Digital Experience Cloud

Episerver Commerce

User Guide

Episerver Commerce User Guide

Release date 2020-10-28

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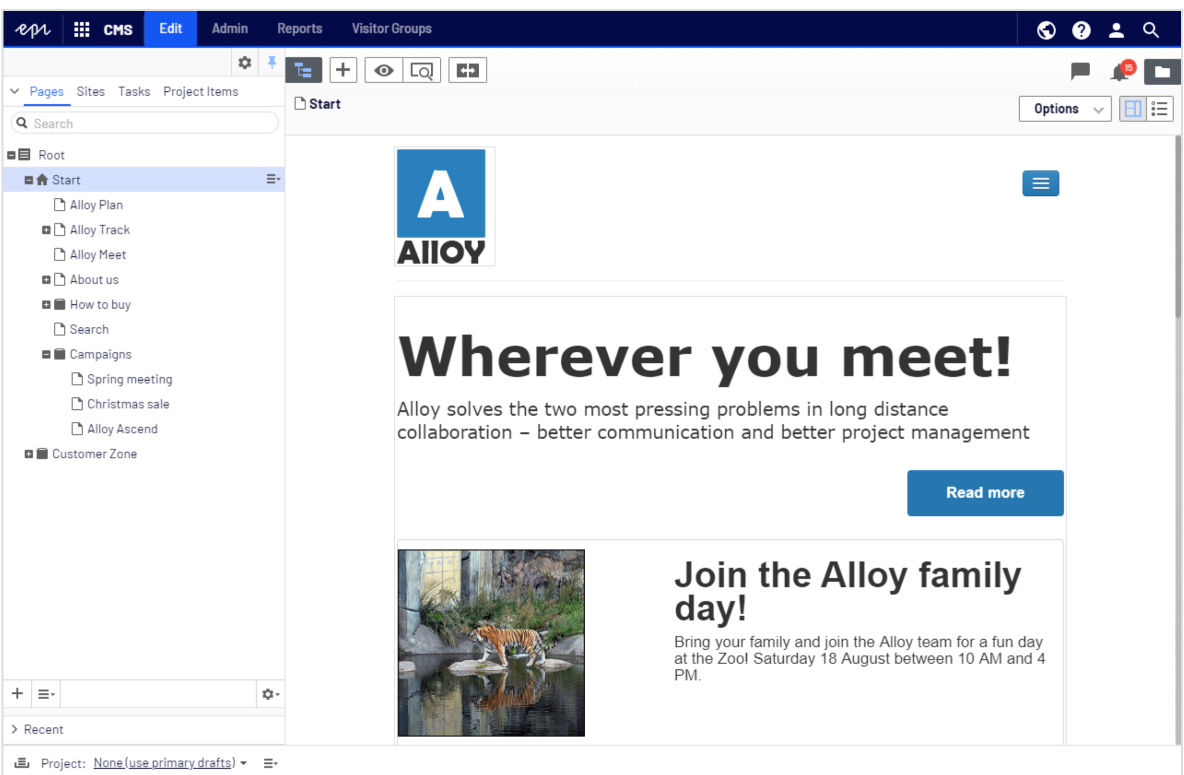
Introduction

Online help describes the features and functionality of the Episerver Digital Experience platform and covers CMS for content management, Episerver Commerce for e-commerce functionality, Episerver Campaign for omnichannel campaigns, Episerver Search & Navigation (formerly Episerver Find) for extended search, Episerver Visitor Intelligence (formerly Episerver Insight) for visitor profiles and customer segments, Product and Email Product Recommendations, and Triggered Messages for personalized product recommendations, and Episerver add-ons.

You access the online help from within the Episerver platform or from Episerver World. The online help is also available in PDF format for users who prefer PDF or want to print the documentation.

This PDF describes the features and functionality of Episerver Commerce, which you can find on Episerver World. Developer guides and technical documentation also are found on Episerver World.

The user guide is intended for editors, administrators, marketers and merchandisers, working with tasks as described in Roles and tasks.



Features, licenses and releases

The user documentation is continuously updated and covers the latest releases for the Episerver platform.

Episerver CMS is the core part of the Episerver platform providing advanced content creation and publishing features for all types of website content. CMS features are available in all Episerver installations.

Episerver Commerce adds complete e-commerce capabilities to the core functionality in CMS. It requires a specific installation and license.

Episerver Campaign lets you orchestrate omnichannel campaigns from a single screen, and send triggered emails based on real-time behavior. Campaign requires additional license activation.

Episerver Search & Navigation adds advanced search functionality to websites. It is included in the Episerver Cloud services; for on-premises installations it requires a specific installation and license.

Episerver Visitor Intelligence is a user interface for viewing and filtering visitor profiles, and creating customer segments that can be used in omnichannel marketing campaigns. It requires a specific installation and license.

Product Recommendations lets you create and configure a merchandising campaign with personalized product recommendations from the personalization portal. It requires a specific installation and license.

Email Product Recommendations lets you include personalized product recommendations in any email, including cart abandonment and retargeting emails, from the personalization portal. You can also work with behavioral triggers to detect on-site behaviors and act upon them through automated, personalized emails. It requires a specific installation and license.

Add-ons extend the Episerver capabilities with features like advanced search, multi-variate testing, and social media integration. Some add-ons are free, others require license activation. Add-ons by Episerver are described in the online help.

> **Note:** Due to frequent feature releases, this user guide may describe functionality that is not yet available on your website. See What's new to find out in which area and release a specific feature became available.

Images and screenshots

The Episerver user guide uses images and screenshots to visually guide you through the features of the Episerver platform. Due to different versions, continuous updates, and specific system permissions, images and screenshots may differ from the actual appearance.

Notes

Three types of notes are color marked throughout the user guide: tips, notes and warnings.

> **Tip:** Green indicates tips that might show you an easier way to perform a task.

> **Note:** Yellow indicates important information that may affect your work and should not be missed.

> **Warning:** Red indicates warnings. If these warnings are ignored, serious errors or problems may occur.

Copyright notice

What's new?

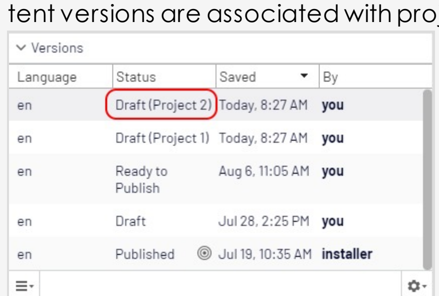
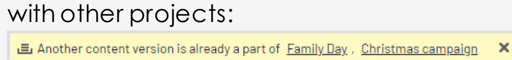
This user guide describes functionality available in the latest release of a standard implementation of the Episerver platform software and services. New features are continuously made available. See Episerver updates.

> **Note:** Due to frequent feature releases, this user guide may describe functionality that is not yet available to you. Contact your system administrator for information about products and versions in your Episerver implementation.

This release of the Episerver User Guide describes features available in Episerver as of 2020-10-28. See release notes (below) for update history. See Archived documentation in the online version of the user guide for previously released user guides and for older release notes.

Release notes 2020

Released	Area	Features and updates
2020-10-28	Personalization	In Product Recommendations, when an editor makes changes to a merchandizing campaign, a reviewer can accept or reject the changes.
2020-10-13	Campaign	Using Web Push, you can send messages that appear in the recipient's web browser without a specific request. (update 338) In the Post-click tracking topic, you can find information on how to create a tracking pixel without cookie.
2020-10-13	Commerce	When searching for line items on the Order Management screen, each search result contains a link to the respective product page on the e-commerce website. (update 336)

Released	Area	Features and updates
2020-10-05	Personalization	A repurchase strategy was added to the daily trigger options.
2020-10-05	Episerver platform	A globe icon has been added to the top menu. This icon takes you to your live sites. (update 335)
2020-09-24	Campaign	See Deliverability basics for information about SMTP codes and error messages.
2020-09-17	Episerver platform	An introduction to the Episerver Labs concept has been added.
2020-09-02	CMS	Improvements to the projects feature (update 328): • The Versions gadget now displays if content versions are associated with projects.  • You are now notified if there are versions of the current content item associated with other projects: 
2020-09-02	Campaign	If you forget your password or PIN, you can reset them without contacting customer support. See Resetting password and PIN. (update 332) In Deep Analytics, you can show the ID instead of the name for the client, mailing and recipient list groupings. (update 332)
2020-08-21	Campaign	You can now use an existing target group as template when creating a new target group. (update 330)

Released	Area	Features and updates
		If you use unsubscribe lists based on recipient lists, you can choose whether to export global unsubscribers that are not assigned to any particular recipient list or unsubscribers that are assigned to one or more recipient lists. See Exporting recipients. (update 330) A video on how to create a double opt-in process has been added.
2020-08-21	Personalization	A Content Recommendations FAQ has been added.
2020-08-12	Commerce	On the Order Management screen, you can create payment plans. (update 328)
2020-08-12	Personalization	Email Content Recommendations is a new Personalization feature that lets you deliver relevant content to your customers by email. (update 326)
2020-08-12	Campaign	See Deliverability basics for information about blacklists and blacklisting.
2020-07-22	Campaign	In the Recipient history, you can now irrevocably delete recipient data according to GDPR regulations. (update 326) Changed user management: You can only assign roles to users, not individual permissions. (update 326)
2020-07-02	Episerver platform	The new topics, Providing product recommendations and Providing content recommendations, have been added.
2020-06-25	Campaign	The new topic Scheduled jobs in the support section informs about the possibilities to set up scheduled import and export jobs and other features using the new online forms on Episerver World.
2020-06-25	Commerce	The beta phase of the Order Management screen has been expired. Customer service representatives can perform common tasks on

Released	Area	Features and updates
		carts, orders and payment plans. On the Order Management screen, you can now add a new shipping address to a customer's order without editing an existing address or adding a new address to the customer's address book. (update 321)
2020-06-12	Languages	Added Connecting to the auto-translation service to Episerver Languages. (update 319)
2020-06-12	Personalization	Personalization user interface has been updated. (update 318)
2020-06-12	Campaign	A new topic, Using marketing segments as target groups for mailing campaigns, has been added. The new E-commerce integration guide section provides an introduction to working with Episerver Campaign, and integrations with e-commerce systems.
2020-05-28	CMS	A new topic, Best practices for organizing assets, has been added.
2020-05-28	Commerce	Several updates to the Order Management screen, including the ability to easily find carts, customers, purchase orders and payment plans. You can now also create purchase orders and exchange orders on the Order Management screen. (update 317)
2020-05-28	Campaign	You can use the extended recipient list connector to address more than 100,000 recipients per campaign with Microsoft Dynamics CRM. Deep Analytics: Pivot tables now support HTML5. As some functionalities changed, the documentation was adjusted accordingly. (update 317) Template Kit: You can now change the image quality of the uploaded image in the image bar

Released	Area	Features and updates
		paragraphs, text/image paragraphs, content interface paragraphs and in the general SWYN settings to adjust the image display in the mailing. In addition, SWYN is now available for WhatsApp and email.
2020-05-14	Forms	You can now disable the replacement of placeholders in rich-text form elements in multi-step forms. (update 315)
2020-05-07	CMS	You can now turn the A/B testing feature on and off from admin view. (update 314)
2020-05-07	Personalization	Content Recommendations anonymously tracks visitor activity on a website to build a profiles for each visitor. Analysis of a unique profile lets you deliver the most relevant content to each visitor.
2020-04-30	Episerver platform	A new topic, Working with search engine optimization, has been added.
2020-04-23	Campaign	You can change the URL of the confirmation page the unsubscribe link points to. See Unsubscribers. (update 312) See Deliverability basics for information about email authentication and encryption.
2020-04-16	Commerce	Customer service representatives can process a return authorization and create a refund for a customer. (update 311)
2020-04-16	Campaign	In the Episerver Campaign start menu, the Episerver Reach menu item has been renamed to **Personalization Portal**. The Personalization Portal lets you access Episerver Product Recommendations and Episerver Email Product Recommendations. The Episerver Insight menu item has been renamed to **Visitor Intelligence**. Episerver Visitor Intelligence lets you view and filter website visitor profiles, and create customer segments. (update 312)

Released	Area	Features and updates
2020-03-20	Add-ons	The ExactTarget Marketing Automation connector is now Salesforce Marketing Cloud (ExactTarget) and the Silverpop Marketing Automation connector is now Watson Marketing (Silverpop).
2020-03-20	Campaign	The new Opt-in processes feature lets you create and manage opt-in processes and its opt-in emails (registration confirmations). (update 308) You can use the **Block** node in transactional mails to exclude recipients who are on a custom blacklist. (update 308)
2020-03-20	Add-ons	Marketing Automation has a new Delivra connector. (update 306)
2020-03-20	Commerce	The scheduled job Collect orders per promotion statistics reworks the collection of order statistics to improve performance. (update 305)
2020-03-20	Search & Navigation	The product Episerver Find has been renamed to Episerver Search & Navigation throughout this user guide. Note that the old product name 'Find' can still occur in the user interface.
2020-03-20	Campaign	In the **Advanced** node of the Marketing Automation, you can filter recipients by Insight segments. (update 306)
2020-03-20	Commerce	On the Order Management screen, you can now process an order return. (update 305)
2020-03-20	Personalization	Email Product Recommendations: You can add an email product description that has a transparent background. When you use a top-up or fallback, a preview appears. (update 306) Product Recommendations: In generated HTML, you can define the default image size that is sent for empty images that have no products. (update 306) Triggered Messages: You can fire triggers

Released	Area	Features and updates
		based on locale so you can send emails to customers in the correct language. When you use the **AddToGroup** or **RemoveFromGroup** ESP actions, there is no limit to the number of triggers fired by **Contact frequency**. You can set a limit for campaigns using the SendMessage ESP action. (update 306)
2020-02-20	Episerver platform	A new section, User scenarios, has been added to the user guide describing common cross-platform user scenarios, such as working with products, optimizing search results, or using visitor groups for personalization.
2020-02-20	Campaign	When configuring a Mobile Push message in Smart Campaigns, you can now upload an image or specify an external image URL. (update 304)
2020-02-20	Campaign	In the **Advanced** node of the Marketing Automation you can limit the number of recipients to whom the mailing is to be sent. (update 302)
2020-02-20	Commerce	On the Order Management screen, you can now view returns. (update 299)
2020-02-20	Personalization	You can now prioritize Triggered Messages campaigns.
2020-01-20	Campaign	The new feature SMS processes lets you create and manage SMS processes such as unsubscribing from marketing SMS by sending the keyword *Stop* or requesting help by sending the keyword *Help*. (update 304)
2020-01-20	Search & Navigation	A new topic, Using Personalized Search & Navigation, provides information about the Personalized Search & Navigation product: its benefits, how it works, and how to enable it.
2020-01-20	Campaign	Several updates to the Microsoft Dynamics CRM integration: You can assign Episerver Campaign

Released	Area	Features and updates
		test lists to check the mailing content before dispatch. The process of preparing the campaign activity for dispatch has been revised. (update 298) Several updates to the Magento 2 integration: Screenshots and names have been adjusted to the new version 1.3.5. (update 298) In the API overview, you can find information about the Episerver Campaign REST API. (update 298)

Archived documentation

If your Episerver implementation is not on the latest version, you can access previous versions of the Episerver User Guide under Archived documentation in the online version of the user guide.

Getting started

This topic describes how to log in to an Episerver website, access features and navigate the different views. The login procedure may be different from what is described here, depending on how your website and infrastructure are set up.

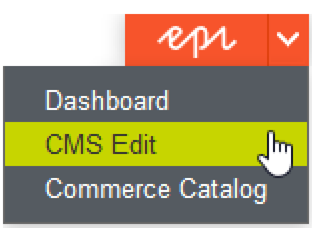
Logging in

As an editor or administrator, you usually log in to your website using a specified URL, a login button or link. Enter your user name and password in the Episerver login dialog box, and click **Log In**.

Accessing features

What you are allowed to do after logging in depends on your implementation and your access rights, since these control the options you see. When logged in, the Episerver quick access menu appears in the upper right corner.

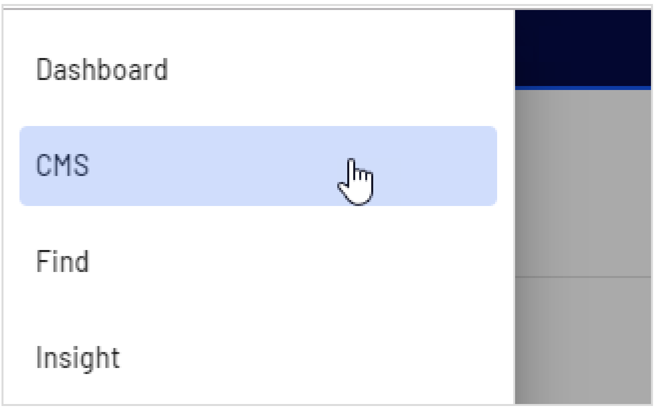
Selecting **CMS Edit** takes you to the edit view and other parts of the system. You can go directly to your personal dashboard by selecting the **Dashboard** option.



Navigation

Navigation within CMS and to other parts of the Episerver platform is done via the **top menu**.

The menu displays a product switcher which opens a product selector area. From the product selector area, you can open products and systems integrated with your website. Select **CMS** (for example) to display available options in the submenu.



> Note: Your menu options vary depending on your access rights. These user guide examples assume that the user has full permissions to all functions in Episerver.

Next steps

- The User interface and Roles and tasks topics describe the different parts of the user interface and the Episerver user roles.
- Creating content in the CMS Editor User Guide describes how to create content with images, blocks, links, and forms.
- Managing content in the CMS Editor User Guide describes how you can translate, preview, and compare content. It also describes how you can structure the website by moving, copying, and sorting pages and so on in the page tree.
- For publishing and collaboration, see Working with versions and Controlling the publishing process in the CMS Editor User Guide.
- Administration interface in the CMS Administrator User Guide to administer and configure settings in Episerver.
- If you have Episerver Commerce installed, see the Commerce User Guide to work with e-commerce tasks.

- If you have Episerver Search & Navigation installed, see the Episerver Search & Navigation User Guide to work with search optimization.

Roles and tasks

Episerver is designed to interact with website visitors, and for collaboration among users of the platform. This tpoic describes typical roles and related tasks used in scenarios. See Setting access rights in the CMS Administrator User Guide to configure user groups and roles in Episerver.

Visitor and customer

A *visitor* is someone who visits a website to find information or to use services. If the website is an e-commerce site, the visitor can be a *customer* with purchasing intentions. A customer can purchase on an e-commerce website "anonymously" (payment and shipping details provided), or by registering an account. Visitors may also contribute to website content as community members, which usually requires registration of an account profile.

Community member and moderator

A *community member* or a visitor can add content, if social features and community functionality are available for the website. This content includes forum and blog postings, reviews, ratings and comments, in which case an editor, or a specific *moderator* role for large websites and online communities may need to monitor this type of content on the website.

Recipient

A *recipient* is an individual who has opted-in to receive emails from a business, for example when purchasing from the website. Recipients and their associated data are managed in recipient lists that are used for omnichannel marketing. You can track and analyze recipient actions, such as clicking links in an email, providing input to website owners and users for further marketing actions.

Website owner

A *website owner* is someone with overall business and/or technical responsibility for the content and performance of one or more websites. The website owner may monitor website activities such as page conversions, customer reviews, or sales progress; rarely creates content but can be involved in the approval of content created by others. A website owner may also have administrative access, and be the owner of mailing clients used for organizing campaign mailings.

User

A *user* is someone who logs in to the Episerver user interface to work with different parts of the platform, and can belong to one or more user groups and roles, depending on which parts of the Episerver platform they use, their tasks, and the size and setup of the organization.

Content editor

A *content editor* is someone with access to the editorial interface who creates and publishes content on the website. Content editors with understanding of the website content work with search optimization for selected content in search results. Editors may also want to follow-up on content with unusually high or low conversion rates to update or delete this content.

Marketer

A *marketer* creates omnichannel campaigns and content with targeted banner advertisements to ensure that customers get a consistent on-site experience. The marketer also monitors campaign KPIs (key performance indicators) to optimize page conversion. A marketer with understanding of the website content may also optimize search for campaigns, and promote content using personalization features.

Merchandiser

A *merchandiser* typically works with stock on an e-commerce website to ensure that the strongest products are put in focus. This role may create landing pages, enrich product content, set product pricing, coordinate cross-product selling, oversee delivery and distribution of stock, and deal with suppliers. A merchandiser may want to identify search queries with unusually high or low conversion rates, to adjust the search. May also work with product promotion using personalization features.

Administrator

An *administrator* configures system settings from the administration user interface, including search, languages, personalization, and user access. Administrators usually have extended access rights compared to other user groups, and can access all parts of the Episerver platform. They may also have administration access to integrated third-party systems. The administrator may also be the contact person for communication with the developers maintaining the website.

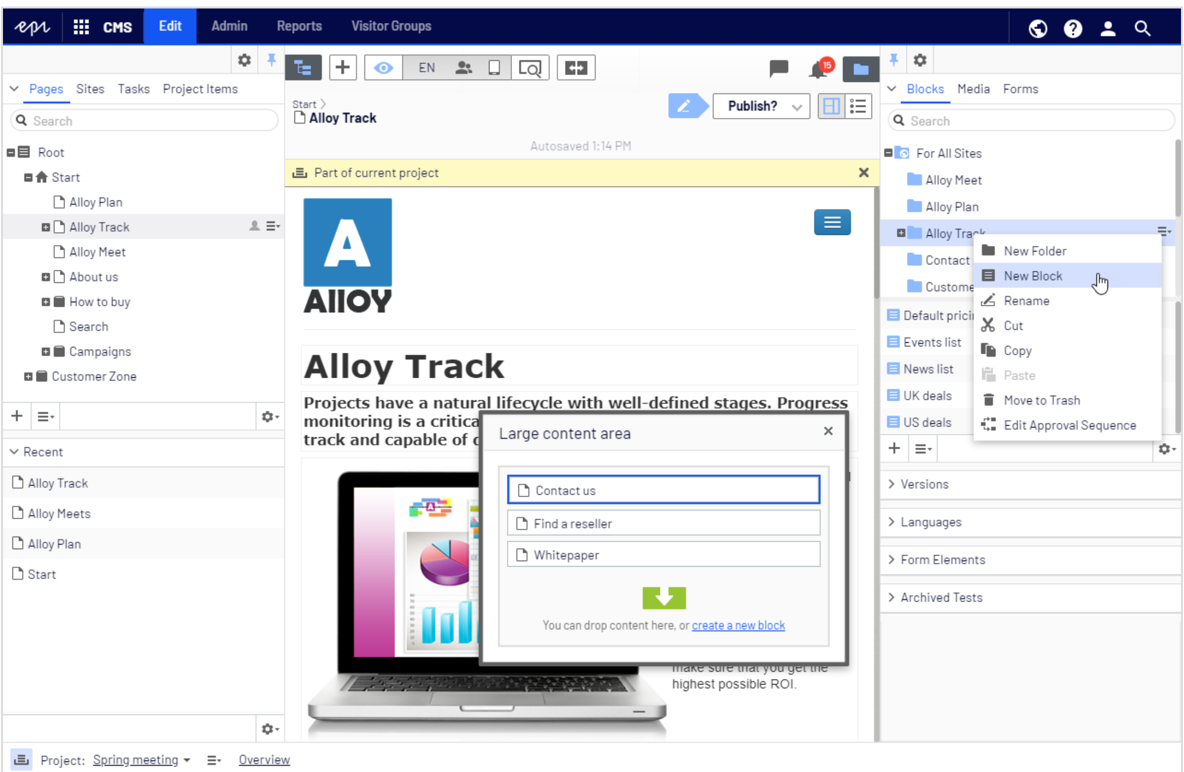
Developer

A *developer* is someone with source code access and programming skills. Developers work with website configuration, implementation, maintenance and development of new functionality. They create the rendering templates for content and product catalogs, configure e-commerce settings, and manage indexing and customized search features. Developers may also install integrations and third-party extensions. Developers may be associated directly with the organization owning the website, or with an external partner company.

User interface

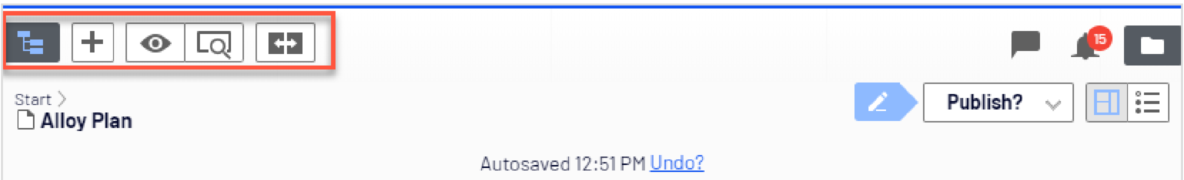
> Note: The Episerver user interface is flexible allowing developers to plug-in customized features when implementing websites. This description refers to Episerver CMS without further customizations.

The **toolbar** and the **panes** in the Episerver edit view provide easy access to functions when working with content. When entering the edit view, you have the top menu and the toolbar at the top, and adjustable panes to the left and right.

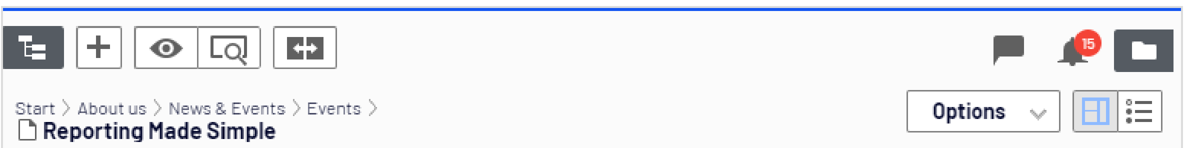


By clicking the product switcher  in the top menu, you can access other products of the Episerver platform. You can also access other parts of Episerver CMS, the live view of your site(s), this user guide, your user settings and a global search from the top menu.

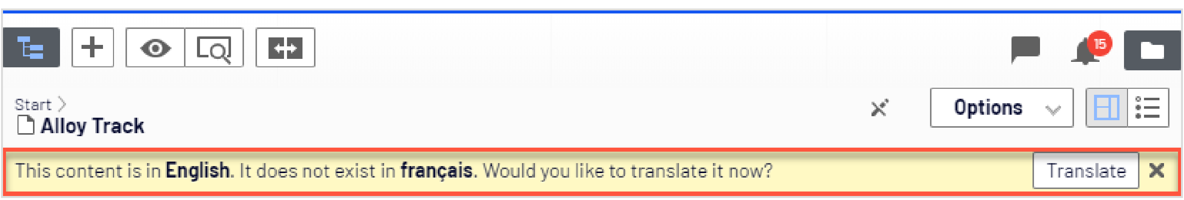
The toolbar contains features like preview and view options, and lets you add items such as pages or blocks.



The page information area below the toolbar displays the page name, the path to the page and when it was last autosaved. If it is possible to undo the latest changes you did to the content, there is also an **Undo** link.



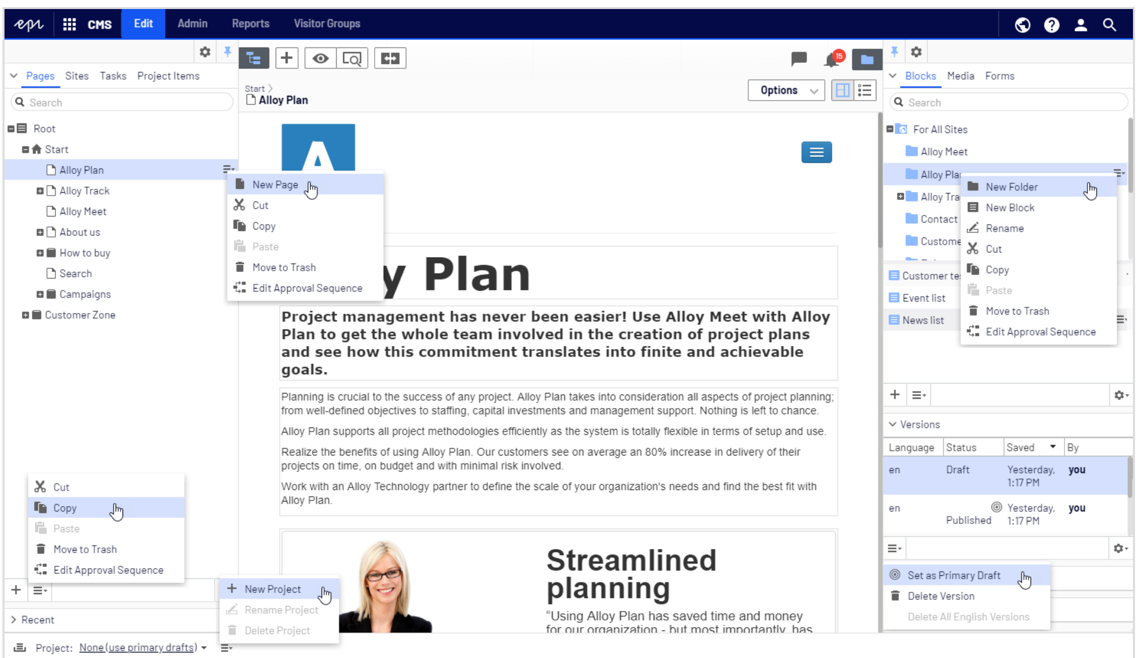
A notification toolbar may be displayed below the toolbar showing confirmation and error messages and such.



General features

- **Context-sensitive actions**. Some features are only available in certain context. The toolbar (for example) presents relevant actions depending on what you are currently doing, and the add (+) button also offers context-sensitive options.
- **Primary actions**. Some actions open in a new window, for example, a page delete confirmation. The background is then dimmed, meaning that you must finish the primary action to continue.
- **Action feedback and notifications**. Successful actions are confirmed by a message in the notification bar. A notification may also appear in case of an error requiring you to take action.
- **Drag-and-drop operations**. Drag and drop is supported in many areas. For example, you can drag pages, media files and blocks into the rich-text area or content areas, or rearrange the page tree structure using drag-and-drop.

- **Tooltips**. Hover over a button or field and a short tooltip appears.
- **Keyboard commands**. Standard keyboard commands are supported in many areas, such as when you move pages in the page tree or in the rich-text editor.
- **Search**. Supported in many areas to locate, such as pages in the page tree or media in the folder structure.
- **Adaptable work environment**. Resize and pin the panes depending on what you are currently doing, and add and remove gadgets of your choice for quick access to functionality.
- **Support for time zones**. Publishing actions in the edit view are done in your local time zone, whereas administrative actions are based on server time.
- **Context menus** are available in many areas, such as in the panes, the page tree and in item listings. The menu displays different available options depending on where in the interface you are and what you are doing.



Panes

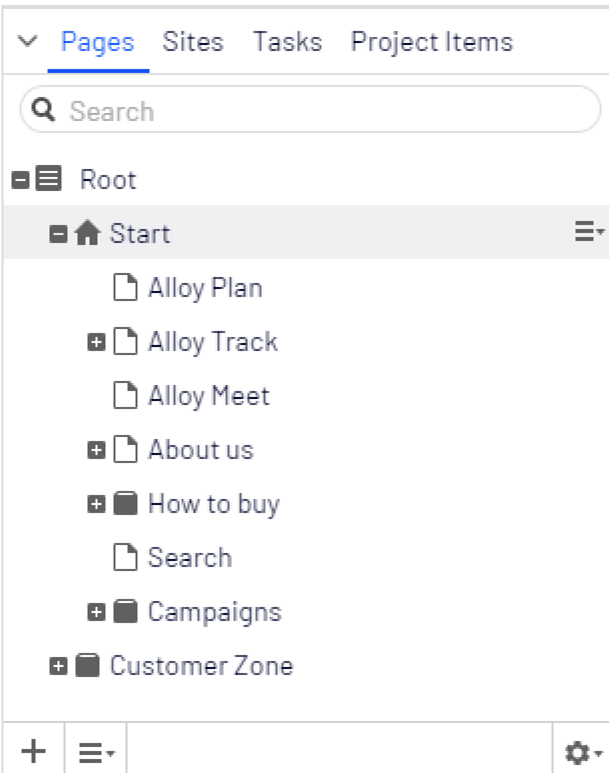
The user interface has a left-hand and a right-hand pane, which can be adjusted and extended with additional gadgets.

 **Pane pin** is used for expanding and locking the panes in an open position.

Settings for a pane or a gadget allow you to configure or remove a gadget, or rearrange gadgets in a pane.

Left-hand navigation pane

Contains the page tree structure (Pages), language branch (Sites) navigation, tasks management (Tasks), and project items (Project Items) by default.

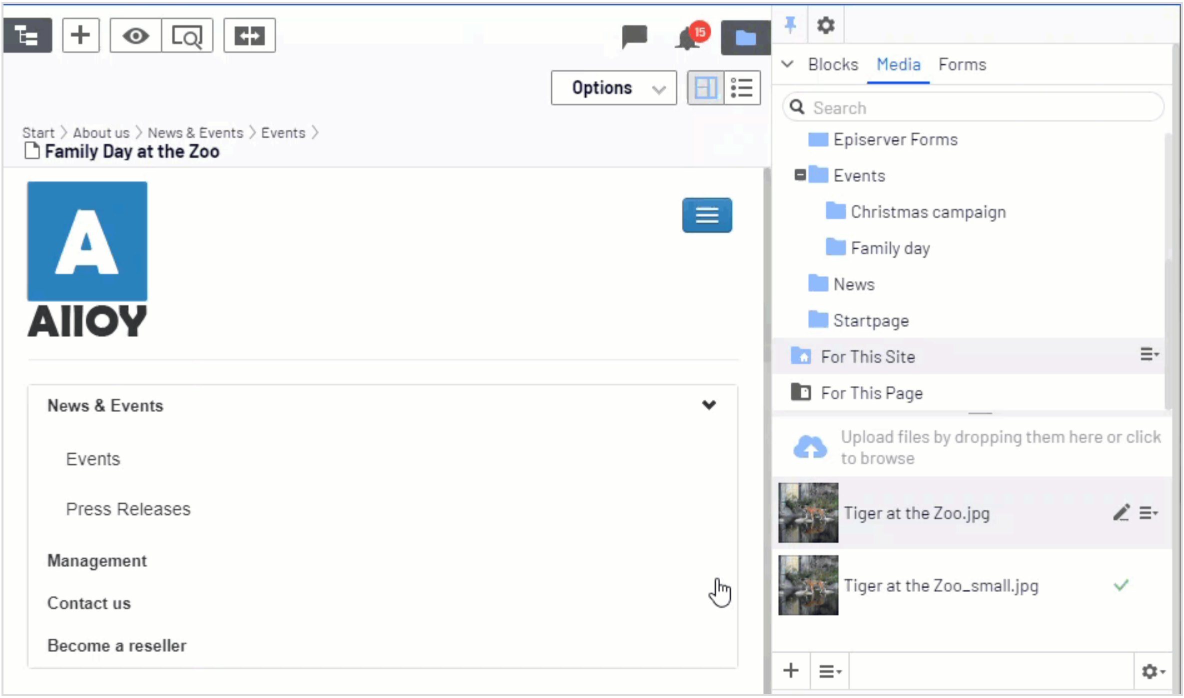


Right-hand assets pane

Contains the Media and Blocks folder structures by default. Drag and drop one or multiple items from the assets pane into the content you are currently working on.

You can also drag and drop multiple items within the assets pane, and delete, cut or copy and paste them, from the context menu or with standard keyboard shortcuts. Any unselected children folders are also moved, copied or deleted.

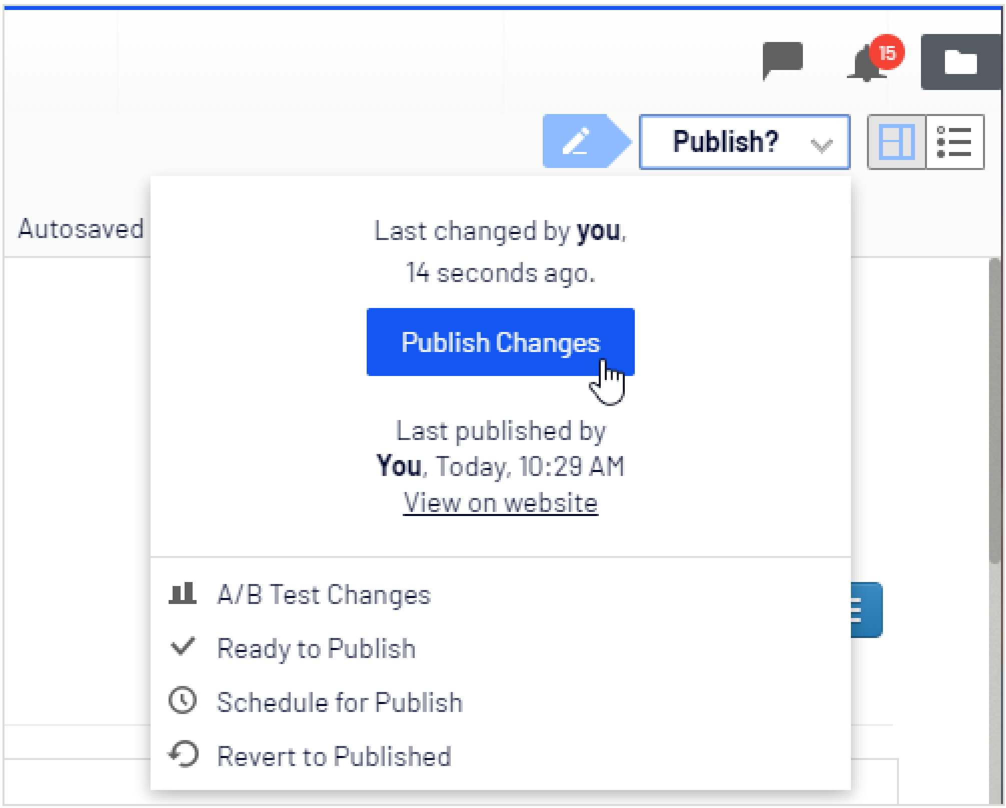
> Note: If you copy and paste multiple folders on different levels, they will be on the same level when pasted.



If you have Episerver Commerce or Episerver Forms installed, the assets pane also displays the Catalogs and Forms gadgets per default.

Editing

The toolbar on top displays an actions menu with context-sensitive publishing options which vary depending on content status and user access rights. During editing, content status and autosave information are displayed.



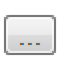
When working with content such as pages and blocks in CMS, or catalog content in Episerver Commerce, there are two editing views, **On-Page Editing** and **All Properties**, with buttons to switch between them.

 On-Page Editing view provides quick access to direct editing of a selection of content properties.

 All Properties view provides access to all available properties including more advanced ones such as access rights and language settings.

When editing content properties, these options are common when adding, deleting, or selecting items:

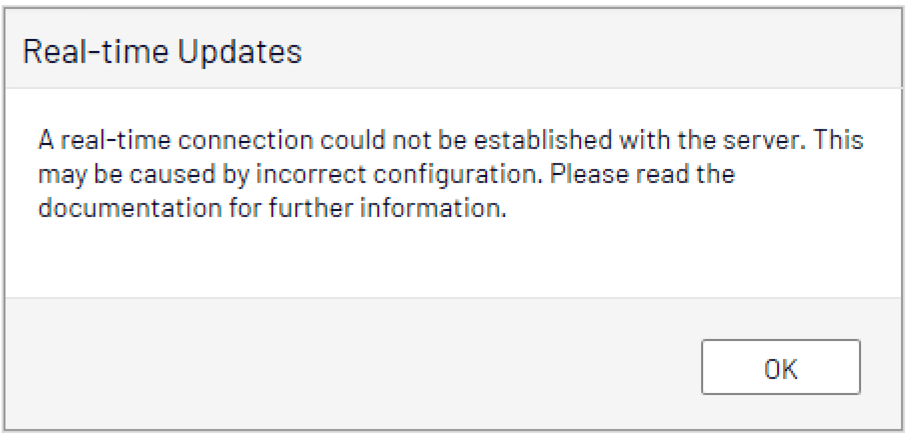
 Click to select (a category, for example).

 Click to select (an image in a media folder, or a page in the page tree).

 Click to remove (a category, for example).

Real-time Updates

Episerver is by default set up to display project comments and changes to projects in the user interface immediately. If Episerver experiences problems with the these immediate updates, the following dialog box appears.



The *Real-time Updates* dialog box can have two main reasons. It appears because Episerver has encountered a network problem and cannot connect to the web server, or because your system does not have the WebSocket protocol enabled, which is used for the real-time updates of the user interface.

Network problems

Network problems occur if there is an error in the web server configuration, or if there are problems with your corporate network or the with Internet connection. As long as there is a problem, you are unable to continue working with Episerver.

Whatever the reason, Episerver will try to reconnect to the web server. If it still cannot connect after a number of attempts, you get an error message saying: "The server has been unavailable for an extended period of time. Please verify the internet connection and refresh the browser."

Contact your IT department or Internet service provider if the problem persists.

WebSocket support

WebSocket is an Internet protocol used to automatically update the Episerver user interface.

If you are using the projects feature, the WebSocket protocol is used to check for new or updated comments and project items from other users. As soon as one of your colleagues adds a comment or project item, Episerver automatically updates your user interface and displays the comment or item (assuming you have the projects interface open).

However, the WebSocket protocol must be enabled for your system by an administrator for the real-time updates to work. If it was not enabled, you can still work with Episerver and with projects and comments but you need to manually refresh the user interface with the **Refresh** button to see new comments or items.

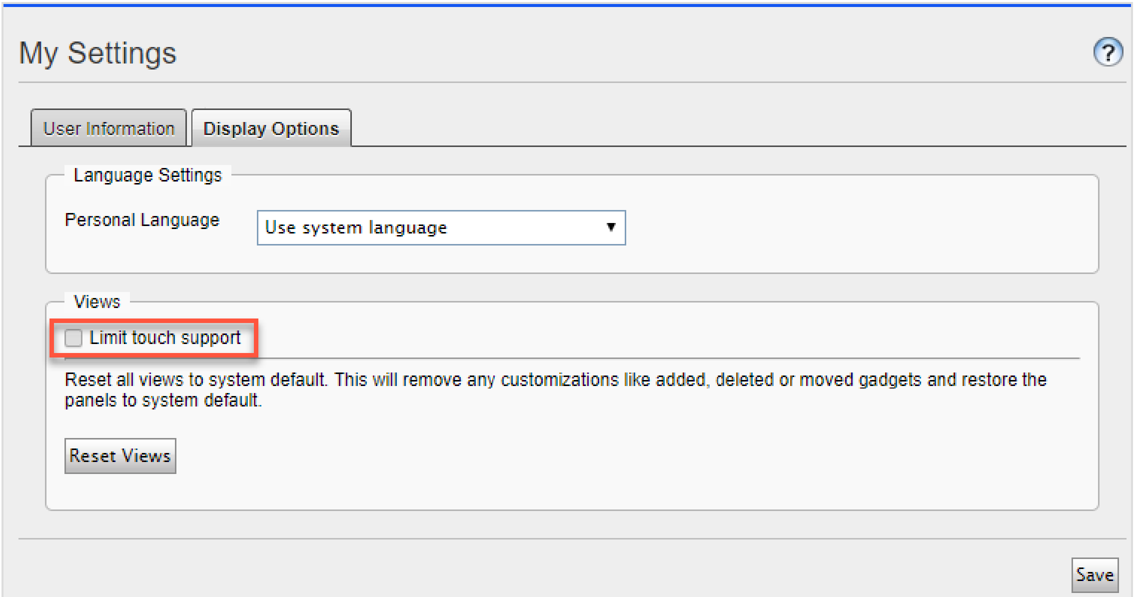
Depending on the system configuration when the WebSocket protocol is disabled, you may or may not see the *Real-time Updates* dialog box.

My settings

Under the top menu > *your user name* > **My settings**, you can change some of your account settings. User name and password are usually set in an external system, such as Windows or an SQL database, and cannot be changed in Episerver in that case.

In the **Display Options** tab, you find the following settings:

- **Personal language**. Select your desired user interface language from the drop-down list. This settings affects the language of the user interface, such as texts in buttons and dialog boxes. It does not affect the language of your website.
- **Limit touch support**. On touch-screen devices, browsers may have difficulties prioritizing between input from the screen and from the computer mouse, which may cause problems such as making it impossible to resize panes using the computer mouse. If you experience problems with Episerver and the touch screen, enable the **Limit touch support** feature. This feature prioritizes computer mouse input over touch screen input and enables the computer mouse for interactions such as drag and drop, resizing of panes, and so on.

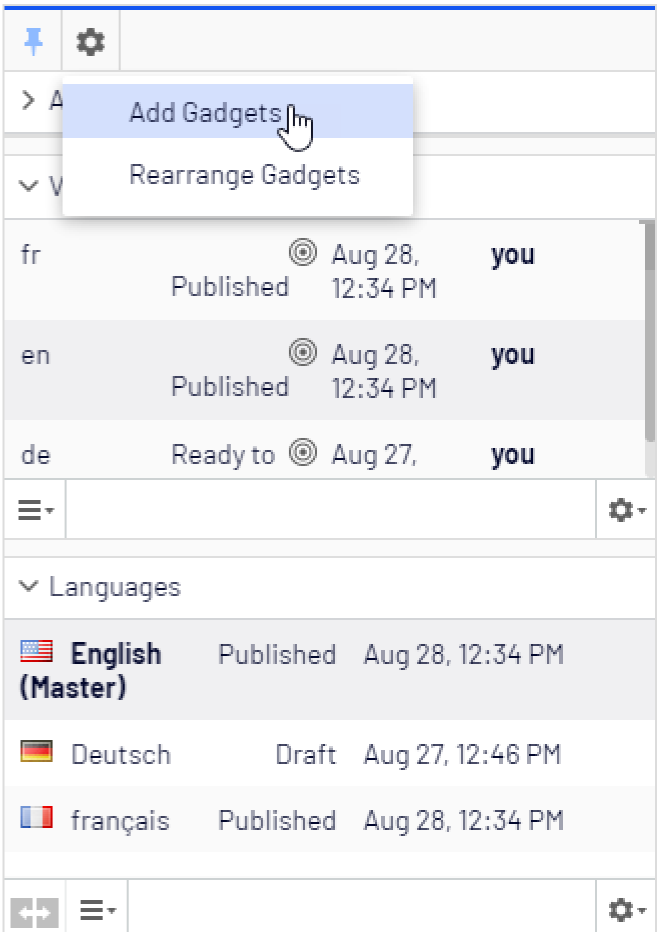


- **Reset all views to system default**. You can reset your user interface views to the settings. If you have changes to the user interfaces, such as added, moved or deleted gadgets, these changes are undone and the default views are displayed.

Add-ons

An add-on is a plug-in or module, developed by Episerver or Episerver partners, to extend the capabilities of Episerver. A developer (or someone with administrative access rights) installs most add-ons. See Episerver World for installation, configuration, and customizing details for each add-on.

When they are installed on the website, you can add some of the add-ons as gadgets to the dashboard or to the navigation or assets panes in edit view.


Add Gadgets
Rearrange Gadgets
fr Published Aug 28, 12:34 PM you
en Published Aug 28, 12:34 PM you
de Ready to Aug 27, you
Languages
English (Master) Published Aug 28, 12:34 PM
Deutsch Draft Aug 27, 12:46 PM
français Published Aug 28, 12:34 PM

Shopping flow

The two most common types of e-commerce websites are:

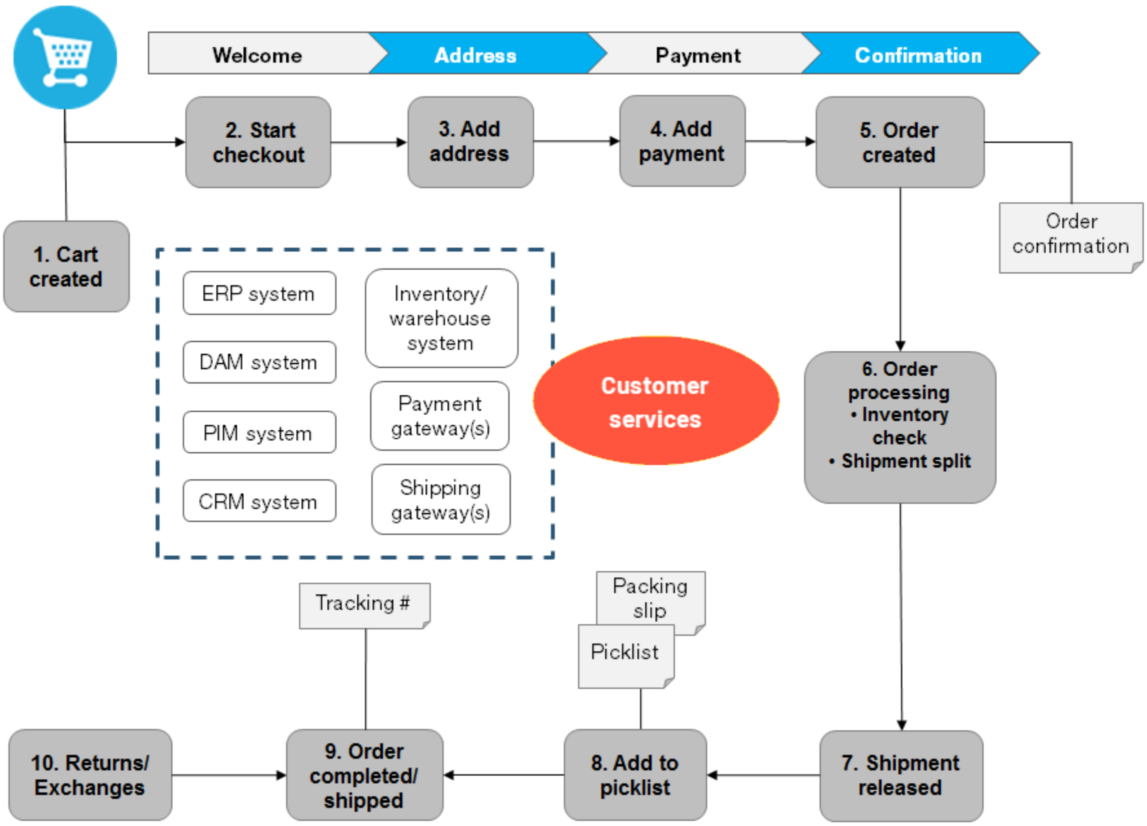
- **Business-to-Consumer (B2C)**: designed for selling goods and services to consumers.
- **Business-to-Business (B2B)**: used to build strategic relationships with other businesses, and to ease the supply and procurement processes that characterize trade among those organizations.

Sites can have multiple roles, and a single site can provide several functions. Episerver Commerce is a flexible platform allowing for seamless integration with external systems such as financial, CRM (customer relationship management), inventory, warehouse, and customer service systems.

A typical B2C shopping flow involves a number of interactions between a site visitor, Episerver Commerce, and any integrated external system. You can automate the shopping flow so that it requires little manual attention. But if needed, you can monitor, access, and manually handle a purchase order from the **Orders** system.

The following example shows a B2C shopping flow and the actions and tasks involved.

Shopping flow example



1. **Cart created.**

   In the shopping flow example, a customer does not need to register on the site to make a purchase. The order process starts when the visitor selects a product and adds it to a shopping cart. A cart (basket) is created and saved in the system, and is viewed in **Order Management** > **Carts**. If the customer does not complete the checkout procedure, the cart remains in the system for a specified time.

   If the customer returns to the website, the cart is available for continued shopping. Already, in this early step, the system performs inventory and pricing checks for warehouse availability and discounts for products in the cart. These checks are updated if the customer returns to the cart.

2. **Start checkout.**

   When the customer completes the purchase and proceeds to checkout, the first step of the checkout procedure is initiated.

3. **Add address.**

   The shipping and billing address information is added together with the preferred type of delivery (First class, Express, and so on). An anonymous customer can add the address information manually; a registered and logged-in customer can populate the address information automatically. You can also set up the system to split shipments and ship to different addresses.

4. **Add payment.**

   The payment is added to the purchase order-to-be. The system calculates the total, including purchase amount and shipping fee. The customer selects a payment method, such as credit card or PayPal. The payment is registered and verified. Payment can happen instantly or after a specified time, depending on how the payment process is set up and the solution type (B2C or B2B). You can also set up split payments, if the system is configured for this.

5. **Order created.**

   Usually, the purchase order is created in the system when the payment is settled. In the last checkout step, a purchase order number is created, the customer confirms the purchase, and an order confirmation is sent to the customer. The shopping cart is converted to a purchase order, which is visible with status **In Progress** in **Order Management** > **Purchase Orders**.

6. **Order processing.**

   After the order is created, order processing starts to check the warehouse and inventory status for the products in the order, and creates the actual shipment. Inventory status for the products may split the order into more than one shipment.

7. **Shipment released.**

   After the shipment is verified, it is released. The purchase order now appears in **Order Management** > **Shipping/Receiving** with the status **Released for Shipping**.

8. **Add to picklist.**

   Warehouse personnel use a picklist to create the physical shipping of the order's products, and produce a packing slip that is attached to the package.

9. **Order completed/shipped.**

   After the system creates picklists with different orders and their respective packing slips, the order is set to **Completed** by creating a shipment validation number that is associated with a tracking number. You can enter the tracking number manually, or automatically if such an integration exists. The tracking number connects the physical package with the shipping provider for the delivery, and tracks the package on its way to the delivery address. The purchase order appears in **Order Management** > **Purchase Orders** again, with status **Completed**.

10. **Return/Exchanges.**

    Only completed orders are subject to a return or exchange. You can create returns automatically or manually by replacing a delivered product with another one in exchange, or a payment refunds, or both. When you create a return, it appears in **Order Management** > **Shipping/Receiving** > **Returns**. Order status may be **Awaiting Exchange**.

    If the return involves replacement of a new product, the shipping procedure is initiated again. The return also may involve receiving a faulty product, in which case a receiving procedure is initiated involving the acknowledgment of a receiving receipt for the returned product.

Integrating with external systems

Episerver Commerce is a flexible platform built for integration with other business systems needed in an e-commerce environment. These systems are typically integrated with various parts of the shopping flow, for exchange of data with Episerver Commerce.

You can integrate the following business systems with Episerver Commerce.

- **Financial system**: Invoice management, payment refunds, and sales reporting.
- **CRM** (Customer Relationship Management): Customer profiles and contact information.
- **ERP** (Enterprise Resource Planning): Pricing, warehouses and inventories, customers, and so on.
- PIM (Product Information Management): Product details for output to different online and print channels.
- DAM (Digital Asset Management): Product-related assets, such as images and videos.
- **Payment gateways**: Payment solutions, such as credit cards and PayPal.
- **Shipping gateways**: Shipping providers and exchange of tracking information.
- **Inventory/warehouse system**: Inventory information exchange in connected warehouses.
- **Customer services**: Order status information.

You can extend your Episerver Commerce solution with additional modules from Episerver and third-party providers. Extension modules are available from the Episerver Add-on Store in episerver.com.

Catalogs

A catalog consists of products and variants (SKUs) organized into a structure based on product categories or *nodes*. Products and variants have associated information such as:

- pricing
- markets
- inventories
- warehouses
- assets, such as images and documents

A product can exist in one or more catalogs. Catalogs are independent from one another. You can create as many catalogs as you want and assign them to one or more websites. And while you often import product catalogs from an externally integrated system, you can create them manually. Further, you can define dates when a catalog is available, so you can prepare future revisions to items, and review them in advance of the release date.

> **Note:** This documentation describes examples from the sample catalog delivered with the Episerver Commerce sample site. Your installation may look different from the sample catalog.

Catalog structure

A catalog is the top-level container for all types of products. You can structure a catalog in a number of ways. For example, your site has several brands or product lines, and each brand or product line has its own catalog. Or, a retailer may have multiple suppliers, and you can segment each supplier into its own catalog. See also: Working with catalog entries.

Catalog meta-classes and meta-fields

You can define meta-classes and meta-fields for both catalogs and orders in the Administration part of Commerce Manager. For example, you create a meta-class called *Wine*. Then, add meta-fields to capture characteristics of wine, such as *color*, *taste*, *vintage* and *maturity*.

Importing and exporting a catalog

You can import a product catalog from an external system into Episerver Commerce. You can also export a catalog.

When to import or export

When setting up an e-commerce site, you need to get the products into the system. You may also need to import a product catalog as new items are added to an external system's catalog. Or, you might want to move or copy catalogs between websites.

While you can manually create a catalog and add catalog entries, that option is less useful with a large catalog. Instead, use one of the import or export methods to efficiently move products into and out of a catalog.

Import and export methods

- **Import/Export feature**. Export a product catalog or import a .zip file into Episerver Commerce.
- **CSV Import**. Manage a product catalog in bulk using the Import via CSV files, which uses an Excel spreadsheet saved as a .csv file. Before the import or export, the product types are mapped to the catalog structure and format. You can use the CSV import feature for your entire catalog, or just portions of it.

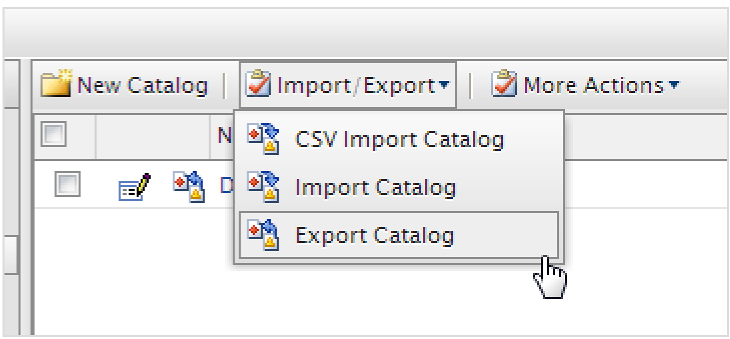
Depending on the import or export setup, you may need to manually edit the information for imported products (such as adding images, documents, and associations) and their variations to complete the task.

Importing or exporting catalog data via a .zip file

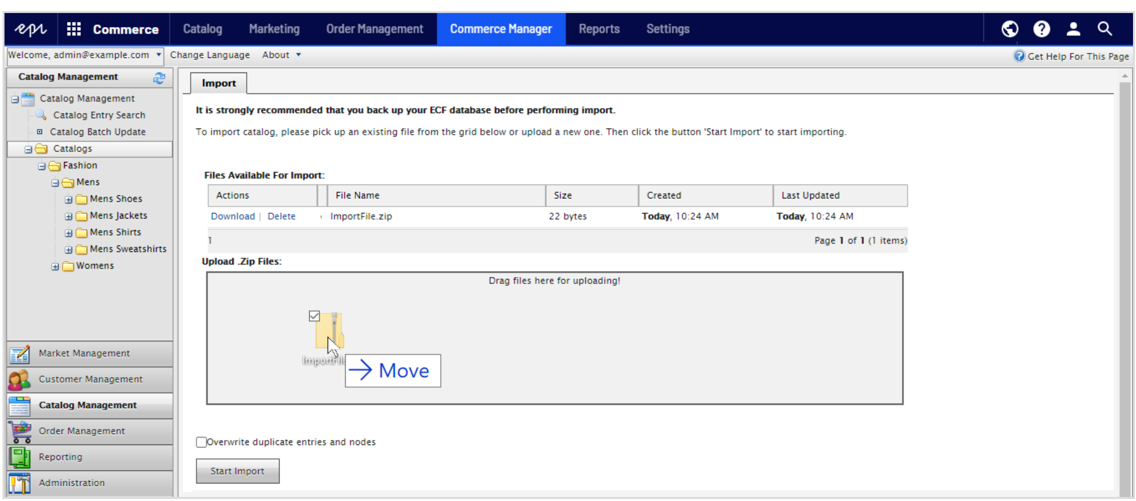
The **Import/Export** feature imports .zip files exported from Commerce Manager. It is a quick way to import catalogs from other websites and start with a base for expanding a catalog.

Importing a catalog

1. Go to **Commerce Manager** > **Catalog management** page.
2. Select **Import/Export** > **Import Catalog**.

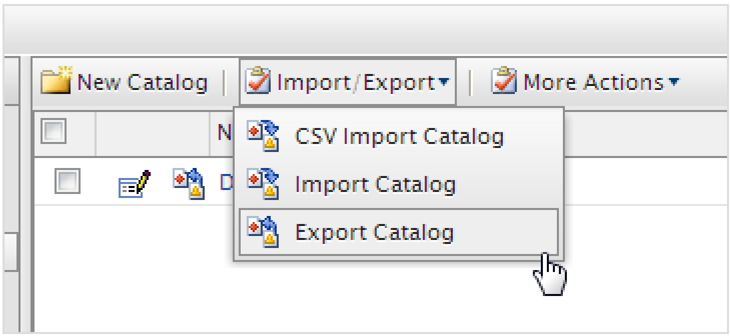


3. Drag and drop the catalog file from the source location. The uploaded files appear in the import list.
4. Click **Start Import**. A progress window shows the status.
5. When the import is complete, close the progress window.

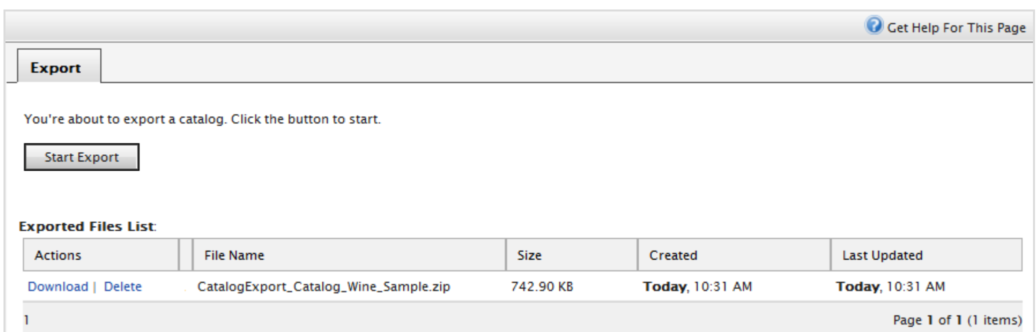


Exporting a catalog

a. Go to **Commerce Manager** > **Catalog management** page.
b. All catalog nodes appear. Select the appropriate ones.
c. Select **Import/Export** > **Export Catalog**. The **Export Catalog** screen appears.



d. Export catalog items in the following ways.
   - To export everything in the catalog node, click **Start Export**. A progress window shows the export status. When the export is complete, close the window.
   - To export selected files, click **Download** next to each item.



e. Click **Download** to copy the exported catalog file to your computer.

Importing a catalog using CSV files

You can import and manage catalog entries in bulk using an Excel spreadsheet (CSV format) as an alternative to manually creating catalog entries, which is tedious when dealing with a large amount of catalog data.

This section explains how to complete these tasks.

- Import .csv spreadsheets to create catalog entries in Commerce Manager.
- Assign catalog items to your category structure.
- Associate an entry with others (such as a variant/SKU appears within a product or a package).
- Edit or delete catalog items.

Using the CSV import feature

Follow these steps to import and set up a new catalog.

1. Create CSV data files (using an Excel spreadsheet or Notepad, for example) with information about categories, entries, and entry relations following the specification below. See also: Sample CSV files.

   ### CSV file format

   - In the first row, insert headers that correspond to data attributes being imported (for example, product name, price, description, image file location).
   - Use the following attributes to identify each item being imported.
     - **Code**. A unique code to identify each category or entry.
     - **Name**. A unique name for each data row.
     - **Entry Type**. (for catalog entries only) In each row, insert one of the following terms to indicate entry type.
       - **Product**
       - **Variation**
       - **Package**
       - **Bundle**
     - **Parent & Child Entry Code** (for entry relations only). Specify the relationship between entries (for example, to display product variations). For example, you want to relate a variant to a product. In this case, the parent entry code is the product's code, and the child entry code is the variant's code.

       For an example of using this attribute, see CSV File Type 3 — Entry relations file.

       You can also use the **Category Code** attribute to create a hierarchy in your catalog.

- **Action**. Specify the import action. See also: Managing content versions during import.
  - **Insert**
  - **Update**
  - **Delete**

  > Note: You must specify a command for each row of the CSV file.
  >
  > If you enter **Insert** for data that already exists, or **Update** if no data exists, an error occurs during import, and those rows are not imported.

- **Category Code** (by comma). Specify the entry's category.
- **SEO URL**. A unique URL for each catalog item.

  > Warning: An error occurs if you import a file that contains more than one occurrence of the same URL.

2. Create necessary meta-fields for the new catalog entries. See also: Creating a catalog meta-class.
3. For each CSV file, create a mapping file, which links data in the CSV file to Commerce Manager attributes.

   Select the type of mapping file you need.

Mapping file type	Used to specify	Example
Category w/ Meta Data	Data for categories or subcategories within a catalog	CSV File type 1 — Category file
Entry w/ Meta Data	Data for catalog entries (packages, products, variant/SKUs, and bundles)	CSV File Type 2 — Entry files
Entry Relation	Relationships between entries. For example, many SKUs to one product, or several SKUs and products to a package.	CSV File Type 3 — Entry relations file

Mapping file type	Used to specify	Example
Entry Association	Associations among entries (such as, advertising other items under text like "You may also be interested in...")	CSV file type 4 — Associations file
Variant w/ Inventory	Information for the **Inventory** tab.	CSV file type 5 — Pricing/inventory file
Sale Price	Information for the **Pricing** tab.	CSV file type 6 — Sale price file

For each mapping file type, the view displays a different set of fields and attributes. You manually assign attributes to each CSV file data column.

4. In **Commerce Manager** > **Catalog Management**, choose an existing catalog folder or create a new one to which to import.
5. Choose **Import/export** > **CSV Import**.
6. Drag and drop the CSV files you created in step 1.
7. Import the CSV files and their corresponding mapping files.

Sample CSV files

CSV File type 1 — Category file

A category file specifies data for categories or subcategories within a catalog.

- The top row has column headers that match metadata fields. The headers can also have different names.
- **Category Code** in column B is important because it specifies where the entry data is stored.
- The code under **Parent Code** (column C) can be used to create subcategories. If **Parent Code** is set to null or root, the category is created in a catalog's root level. Figure 1 shows that *Infants* and *Toddlers* categories are created at the root level, while the *Diapering Supplies* category is located under *Infants* as a subcategory.

CSV file type 1, category file

	A	B	C	D	E	F	G	H	I
1	Action	Category Code	Parent Code	Category Name	Available from	Expires on	Available (True/False)	Sort Order	
2	Insert	Cat1	null	Infants	1/1/2009	6/1/2009	TRUE	1	
3	Insert	Cat2	null	Toddlers	1/1/2009	6/1/2009	TRUE	2	
4	Insert	Cat10	Cat1	Diapering Supplies	1/1/2009	5/1/2009	TRUE	0	
5									

CSV File Type 2 — Entry files

Entry files specify data for catalog entries. The Products, Variant/SKUs, and Packages CSV files for this example are shown in Figures 2, 3, and 4.

CSV file type 2, entry file, products

	A	B	C	D	E	F	G	H	I	J
1	Action	Product Code	Product Name	Entry Type	Category Code	Available from	Expires on	Available (True/False)	Description	
2	Insert	Prod1	Diapers	Product	Cat10	1/1/2009	6/1/2009	TRUE	TestBrand Diapers	
3	Insert	Prod2	Wipes	Product	Cat10	1/1/2009	5/1/2009	TRUE	TestBrand Baby Wipes	
4	Insert	Prod3	Potty Training Pants	Product	Cat2	1/1/2009	6/1/2009	TRUE	TesetBrand Potty Pants	

CSV file type 2, entry file, variations

	A	B	C	D	E	F	G	H	I	J	K
1	Action	Variation Code	Variation Name	Entry Type	Category Code	Available from	Expires on	Available (True/False)	Description	Primary Image	
2	Insert	Var1	Diapers - Newborn size	Variation	Cat10	1/1/2009 6:00	10/1/2012 18:00	TRUE	Disposable newborn diapers	E:\ECF_BabySampleCatalog\BabyCatlaogImages\NBDiapers.jpg	
3	Insert	Var2	Diapers - size 1	Variation	Cat10	1/1/2009 6:00	10/1/2012 18:00	TRUE			
4	Insert	Var3	Diapers - size 2	Variation	Cat10	1/1/2009 6:00	10/1/2012 18:00	TRUE			
5	Insert	Var4	Diapers - size 3	Variation	Cat10	1/1/2009 6:00	10/1/2012 18:00	TRUE			
6	Insert	Var5	Diapers - size 4	Variation	Cat10	1/1/2009 6:00	10/1/2012 18:00	TRUE			
7	Insert	Var6	Training Pants - Blue	Variation	Cat2	1/2/2009 11:00	10/1/2012 18:00	TRUE			
8	Insert	Var7	Training Pants - Pink	Variation	Cat2	1/2/2009 11:00	10/1/2012 18:00	TRUE			
9	Insert	Var8	Training Pants - Yellow	Variation	Cat2	1/2/2009 11:00	10/1/2012 18:00	TRUE			
10	Insert	Var9	Baby Wipes - Portable 80 ct	Variation	Cat10	1/2/2009 11:00	10/1/2012 18:00	TRUE			
11	Insert	Var10	Baby Wipes - 300 ct	Variation	Cat10	1/2/2009 11:00	10/1/2012 18:00	TRUE			
12	Insert	Var11	Baby Wipes - 700 ct	Variation	Cat10	1/2/2009 11:00	10/1/2012 18:00	TRUE			
13											
14											

CSV file type 2, entry file, packages

	A	B	C	D	E	F	G	H	I
1	Action	Package Code	Package Name	Entry Type	Category Code	Available from	Expires on	Available (True/False)	
2	Insert	Package NB	Newborn Package	Package	Cat10	1/1/2009	12/31/2010	TRUE	
3	Insert	Package3to6	3 to 6 mo Package	Package	Cat10	1/1/2009	12/31/2010	TRUE	
4									

CSV File Type 3 — Entry relations file

The entry relations file links one entry to others. In the following example, *Var1* through *Var5* (different diaper sizes) are associated with *Prod1* (Diapers), while *Var9* through

Var11 (different quantity for wipes) are associated with *Prod2* (Wipes), and so on. Some variants are assigned to packages.

> Note: The Prod, Var, and Package codes must be the codes from the entry CSV files (Figures 2, 3, and 4). If you include codes not defined in the entry CSV files, an error occurs when they are imported into Commerce Manager.

CSV file type 3, entry relations file

	A	B	C	D
1	Action	Parent Entry Code	Child Entry Code	
2	Insert	Prod1	Var1	
3	Insert	Prod1	Var2	
4	Insert	Prod1	Var3	
5	Insert	Prod1	Var4	
6	Insert	Prod1	Var5	
7	Insert	Prod2	Var9	
8	Insert	Prod2	Var10	
9	Insert	Prod2	Var11	
10	Insert	Prod3	Var6	
11	Insert	Prod3	Var7	
12	Insert	Prod3	Var8	
13	Insert	Package NB	Var1	
14	Insert	Package NB	Var10	
15	Insert	Package3to6	Var2	
16	Insert	Package3to6	Var10	
17				

CSV file type 4 — Associations file

The associations file creates associations among different entries. In Figure 6, *Var10* is associated to *Var1* as an accessory, and *Var2* to *Var1* as a cross-sell item.

CSV file type 4, associations file

	A	B	C	D	E	F	G
1	Action	Baby Catalog Association Name	Parent Entry Code	Child Entry Code	Sort Order	Association Type	
2	Insert	Accessories	Var1	Var10	1	Optional	
3	Insert	Customers Who Bought This Item Also Bought	Var1	Var2	2	Optional	
4							

CSV file type 5 — Pricing/inventory file

The pricing/inventory file specifies information for each entry's Pricing/Inventory tab.

CSV file type 5, pricing/inventory file

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	Action	Entry Code	Price	Tax Category	Track Inventory (True/False)	Warehouse	Weight	Package	Min Quantity	Max Quantity	In Stock	Reserved	Reorder Min. Qty	Preorder Qty	Backorder Qty	Allow Backorder	Allow Preorder	Inventory Status	Preorder Avail	Backorder Avail	
2	Update	Var1	16.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00	
3	Update	Var2	17.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00	
4	Update	Var3	17.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00	
5	Update	Var4	18.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00	
6	Update	Var5	18.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00	
7	Update	Var6	25.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00	
8	Update	Var7	25.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00	
9	Update	Var8	25.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00	
10	Update	Var9	4.49	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00	
11	Update	Var10	15.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00	
12	Update	Var11	25.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00	
13																					

CSV file type 6 — Sale price file

The sale price file specifies information for the pricing section of the Pricing/Inventory page.

CSV file type 6, sale price file

	A	B	C	D	E	F	G	H	I
1	Action	Entry Code	Sale Type	Sale Code	Unit Price	Currency	Start Date	End Date	
2	Insert	Var1		BBV1	16.99	USD	1/1/2009 6:00	10/1/2009 18:00	
3	Insert	Var2		BBV2	17.99	USD	1/1/2009 6:00	10/1/2009 18:00	
4	Insert	Var3		BBV3	17.99	USD	1/1/2009 6:00	10/1/2009 18:00	
5	Insert	Var4		BBV4	18.99	USD	1/1/2009 6:00	10/1/2009 18:00	
6	Insert	Var5		BBV5	18.99	USD	1/1/2009 6:00	10/1/2009 18:00	
7	Insert	Var6		BBV6	25.99	USD	1/2/2009 11:00	6/3/2009 23:00	
8	Insert	Var7		BBV7	25.99	USD	1/2/2009 11:00	6/2/2009 22:00	
9	Insert	Var8		BBV8	25.99	USD	1/2/2009 11:00	6/1/2009 19:00	
10	Insert	Var9		BBV9	4.49	USD	1/2/2009 11:00	6/2/2009 22:00	
11	Insert	Var10		BBV10	15.99	USD	1/2/2009 11:00	6/2/2009 22:00	
12	Insert	Var11		BBV11	25.99	USD	1/2/2009 11:00	6/2/2009 22:00	
13									

Managing content versions during import

When importing a catalog entry or variant

- If you import via the Service API (application programming interface), you can work with published or draft versions. See Catalog.

- If you import via the XML or CSV format, use the XML input file's **IsActive** attribute to control the status (**Draft** or **Published**) of the imported item. During the import process, choose either **insert** or **update** to begin the process.
- **Insert**. Control the new version's status via the **IsActive** field.
  - If **IsActive**=**True**, the new version's status is **Published**.
  - If **IsActive**=**False**, the new version's status is **Draft**.
- **Update**. Overwrite the current version with data from the input file. Use the **IsActive** field to determine the new version's status.
  - If the catalog has a *published* version and **IsActive**=**False**, the published version is deleted, and the new version's status is **Draft**. All other versions are kept as they were before the import.
  - If the catalog has a *draft* version and **IsActive**=**True**, a new published version is created. All other versions are kept as they were before the import.
  - For all other cases, the existing published or primary draft version is overwritten by the version in the XML/CSV file, and all other versions are kept as before. In these cases, the value of **IsActive** determines the status of the imported entries.
    - If **IsActive**=**True**, the new version's status is **Published**.
    - If **IsActive**=**False**, the new version's status is **Draft**.

Exporting Episerver Commerce Catalog Data to Episerver Campaign

You can set up a periodic transfer of the latest product data from Episerver Commerce to Episerver Campaign. (For more information, see Commerce-Campaign integration.)

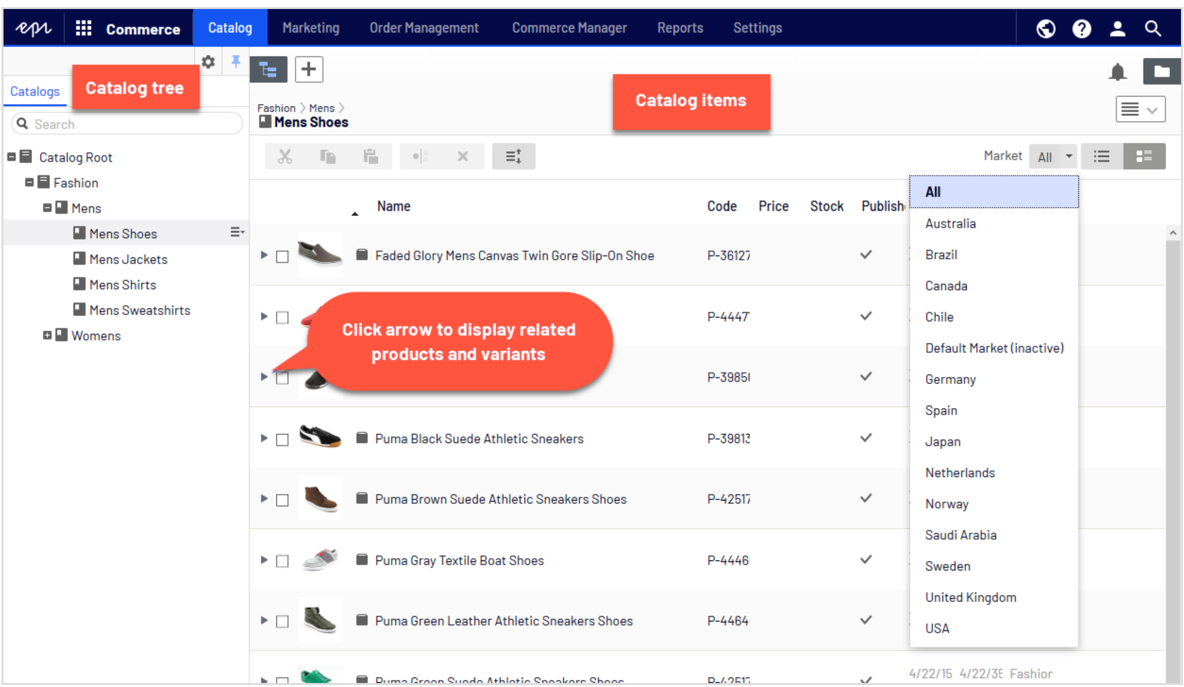
In Episerver Campaign, the Episerver Commerce product data is used in a Content Interface Paragraph. The data can be rendered dynamically based on personal recommendations, or as a static product recommendation rendered for all recipients who get the paragraph in their message. See also: Content interface paragraph in the Episerver User Guide.

Browsing and searching catalogs

Go to **Commerce** > **Catalog** to browse catalogs and their related categories, products, and variants. You can also search for catalog entries.

Browsing catalogs

Click **Catalogs** to browse the list of catalogs. The following image shows multiple catalog nodes containing different types of products.



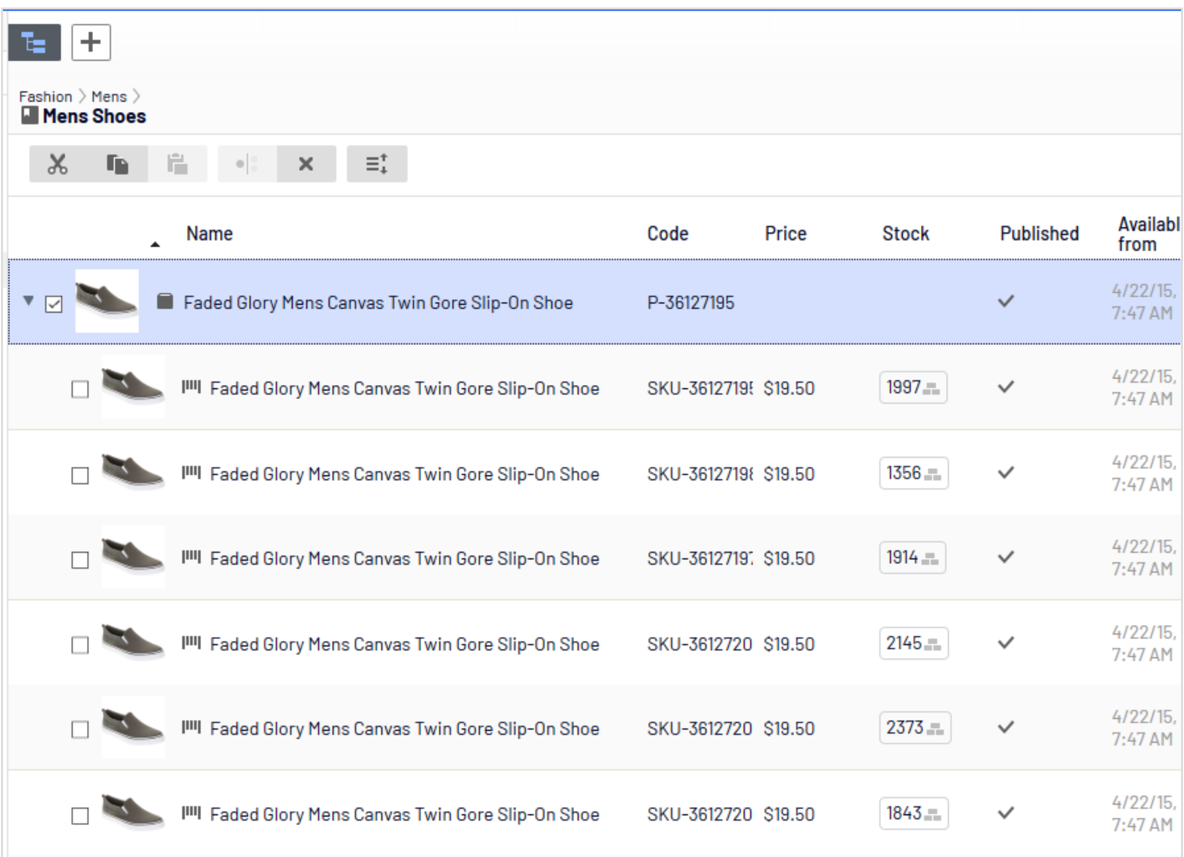
Select a catalog tree node (such as *Books-Art*) to view its categories and catalog entries, which appear in the Catalog item list. The list displays the name, code, price, and availability of products and their variants. To filter an item list by market, use the **Market** selector at the top. You can also display or hide thumbnail images by clicking the **Show as** button in the top right.

Select a category and drill down until you see products, packages, and bundles. Select the arrow next to a product, package or bundle to display related products and variants. Inventory and pricing information appears for variants.

Catalog items have icons, which help you identify their content type.

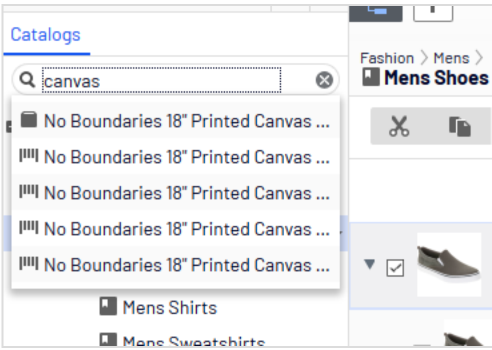
Icon	Meaning
	category
	bundle
	package
	product
	variant

Select a product or variant to view and edit its content. See also: Editing and publishing catalog entries.



Searching for catalog entries

To search for catalog entries from the Catalog tree, enter keywords into the search field. If you enter keywords inside quotation marks (such as *canvas*), the search only returns entries with those exact terms. See also: Search.



Accessing products in CMS

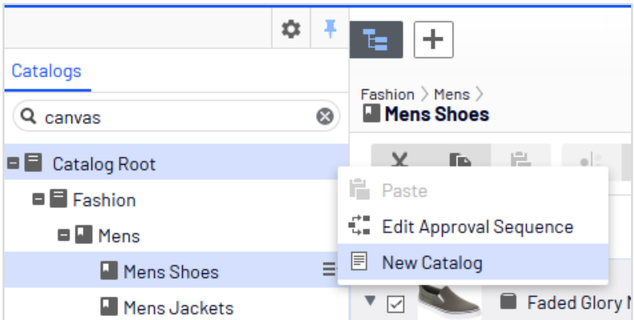
You can also access catalog entries from edit view through the **Catalogs** gadget in the assets pane. The gadget is useful when dragging-and-dropping catalog entries into content areas. See also: Managing content.

Creating and editing a catalog

To manually create a catalog, define its properties then add catalog entries, such as products and variants. You can create a catalog only under the catalog root level. (Alternatively, you can import catalog content from an external source.)

> Note: When creating a catalog structure, carefully consider its maintenance and performance aspects. Do not build hierarchies of categories, products and variants that are too deep. On the other hand, a flat catalog structure with too many entries in the same category can negatively impact performance.

1. In the **Catalog Root** context menu, select **New Catalog**. Or, click **+** > **Catalog** at the top of the screen.



2. Enter the catalog details. The system automatically saves the catalog, but it is not available on the website until published. See Working with versions.
   - **Name**. Enter the name to appear in the catalog listing.
   - **Name in URL**. Automatically created link, based on name and place in the navigation; depends on the implementation if this is visible in links on the site.
   - **Default currency**. Enter the default currency for this catalog's entries. See available currency options.
   - **Default language**. Enter the default (master) language for this catalog's entries.
   - **Base weight**. Enter the standard weight unit applied to catalog entries when calculating weight values for shipping totals in the checkout.
   - **Available languages**. Select languages (in addition to the master language) for this catalog's content. See Managing website languages.

   Catalog properties are global, meaning catalog entries inherit settings from the default (master) language catalog. You can edit properties only from the default (master) language, so if you need to edit properties, switch to the default language. The default language is usually the first language listed next to **Languages** in the header.

   > Note: Changing a catalog's default language is rarely needed. But if you do, some catalog properties might have empty values.

Deleting a catalog

> Warning: Deleting a catalog may cause things to stop working on your site. Before doing so, you may want to export it and save it for future use.
>
> Also, the delete operation may take some time, depending on catalog size.

1. Select the desired catalog in the catalog tree.
2. Click **Delete** in the context menu.
3. Click **Delete Catalog**.

Working with catalog entries

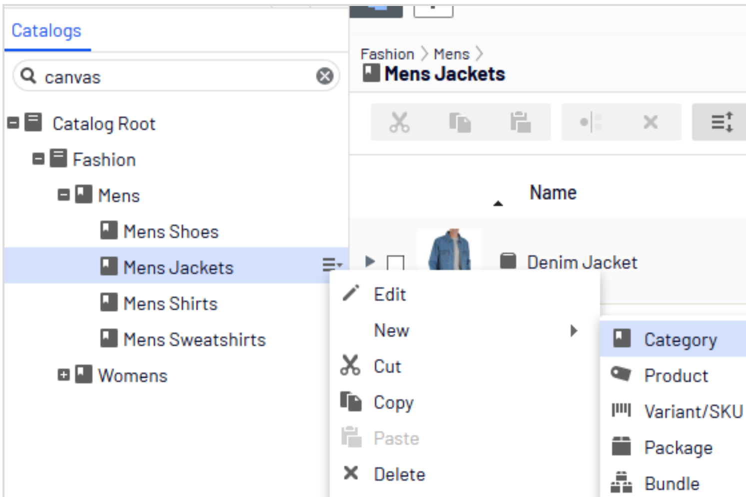
The Catalog interface in Episerver Commerce enables you to work with catalog data. Marketers may want to create new products and variants, and merchandisers may want to enrich products as they are added to e-commerce channels. E-commerce solutions integrated with an external ERP system may have products with core data that only needs to be completed within Episerver Commerce. In other scenarios, you can create new products from scratch.

When working with catalog entries, you typically complete the following tasks.

- Locate incomplete products added from integrated systems, add content and media, then categorize and publish them.
- Create products, add content and media from external sources, then publish them.
- Add missing information to variants: product codes, internal and display names, properties, media, pricing, and inventory information.

Creating a catalog entry

Create a new catalog entry from the catalog tree's context menu or the **Add content** button at top. When you expand the catalog tree, context-sensitive options appear. For example, after selecting a category, you can create a new category, product, variant, package, or bundle. After selecting a product, you can create new products or variants.



The following example shows how to create a catalog entry.

1. Expand the catalog tree and navigate to the desired category.
2. Select the category within which you want to create the catalog entry.
3. From the context menu, select **New > Product**, **Variant/SKU**, **Package**, or **Bundle**. See also: Types of catalog entries.
4. Enter a **name** for the item.
5. If your Episerver Commerce system supports multiple product types, the system suggests a default one based on the context and previous similar actions. Choose a product type.
6. Complete the product's or variant's properties. See also: Catalog entry properties. Episerver Commerce saves the item automatically but it is not available on the website until published.

Because variants belong to the lowest level in the product hierarchy, you cannot add sub-entries for them; you only can edit them.

> Note: The catalog tree does not display products or variants; only category nodes. Use the catalog item list to work with products and variants.

To learn about other catalog entry tasks, such as editing, deleting, moving and so on, see Editing catalog entries

Types of catalog entries

Each catalog entry has a type.

- **Category**. A way to group products, such as *Art Books* or *Cocktail Dresses*. See also: Working with categories.
- **Product**. Merchandise you can display on a front-end site. A product typically consists of several *variants*. Customers purchase a variant.
- **Variant or SKU**. A purchasable product with specific characteristics, such as size, color, sleeve length, and price.
- **Package**. Similar to a variant because it is a purchasable item. For example, a shirt and hat combination is shrink-wrapped together and sold as a unit. Although a package is made up of multiple variants, it has a unique SKU number and appears as a single line item in a shopping cart. See also: Packages and bundles.
- **Bundle**. A collection of variants, allowing customers to purchase two or more items at once. Each item is priced separately. For example, a matching shirt and hat, presented together on the front-end so a user can buy both items at once. Each item appears on its own line in a shopping cart. See also: Packages and bundles.

Editing catalog entries

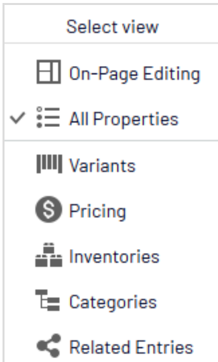
After you import products and variants, you can add to, edit or delete them.

Properties for products and variants are similar, but pricing and inventory information is only defined for variants. See also: Catalog entry properties

> Note: Changes to related entries, pricing and inventory information are immediately published and visible on the website, and are not part of the publishing flow.
>
> Changes to content and assets must be published to become visible on the website. See Working with versions for publishing information.

Catalog-specific editing options

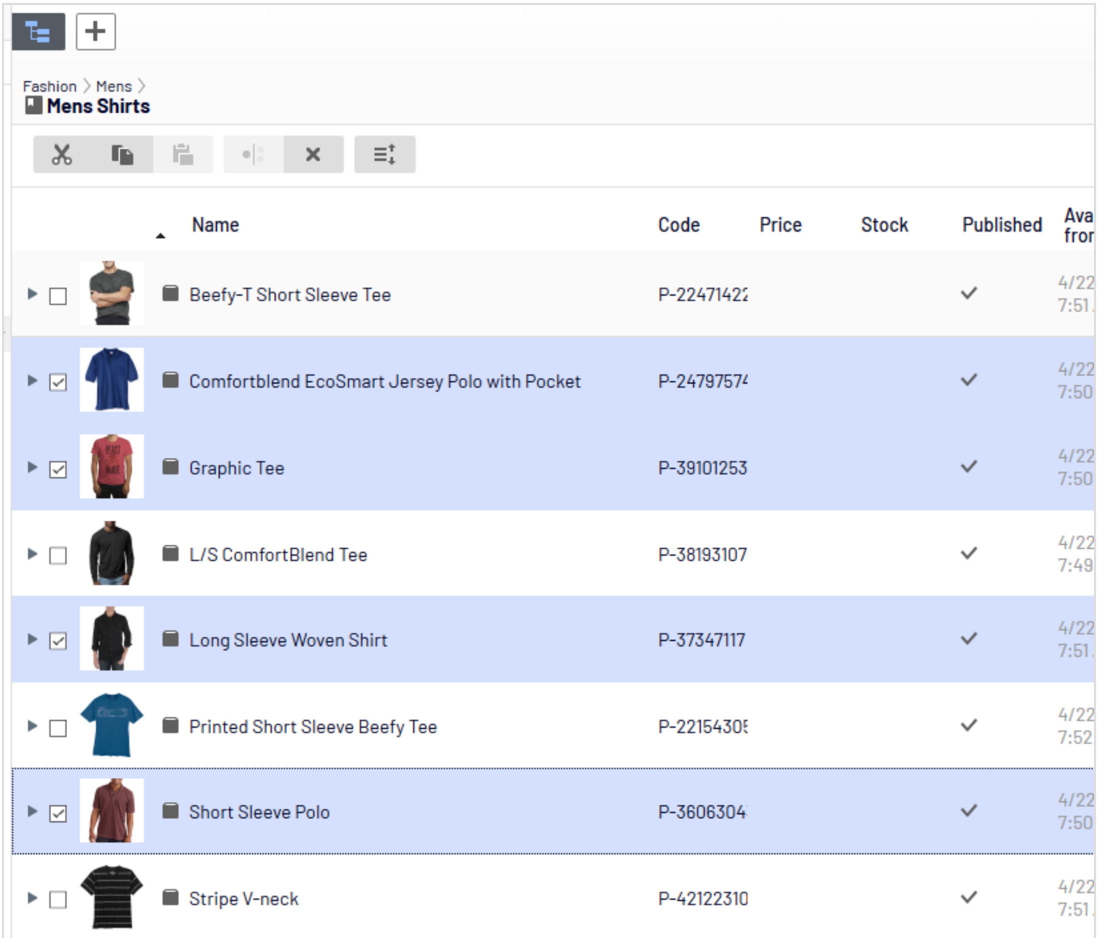
The catalog item list has on the top right a **Select view** with additional editing options. Use these to edit and access the **Pricing**, **Inventory**, **Categories**, or **Related Entries** views.



Editing multiple catalog entries

You can work with several catalog entries at once by

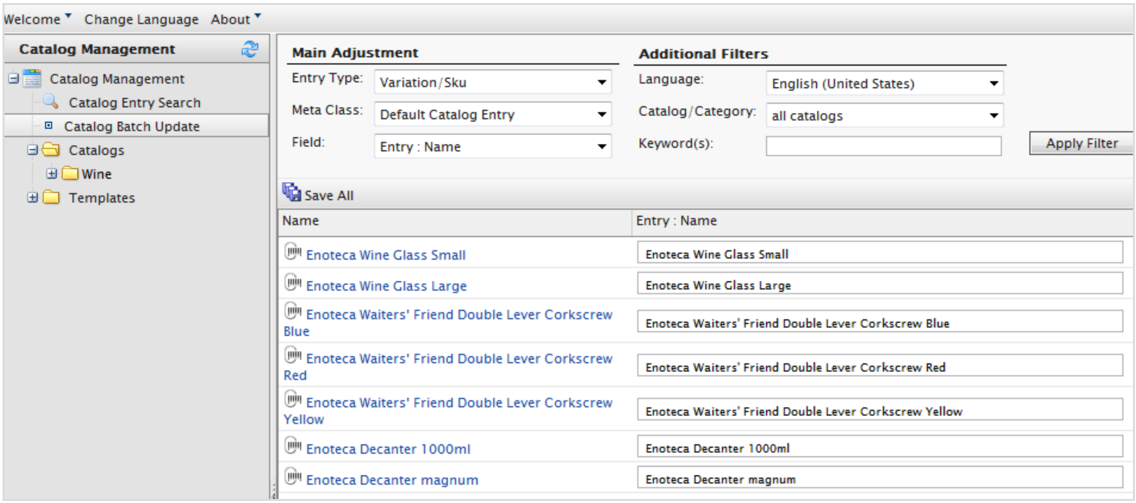
1. Selecting items.
2. Clicking toolbar buttons, such as **cut**, **copy**, **paste**, or **delete**.



Updating multiple catalog entries at once

As a catalog grows larger, use the **Catalog Batch Update** to update multiple catalog entries at once. The option lets you filter items of interest then update several at once.

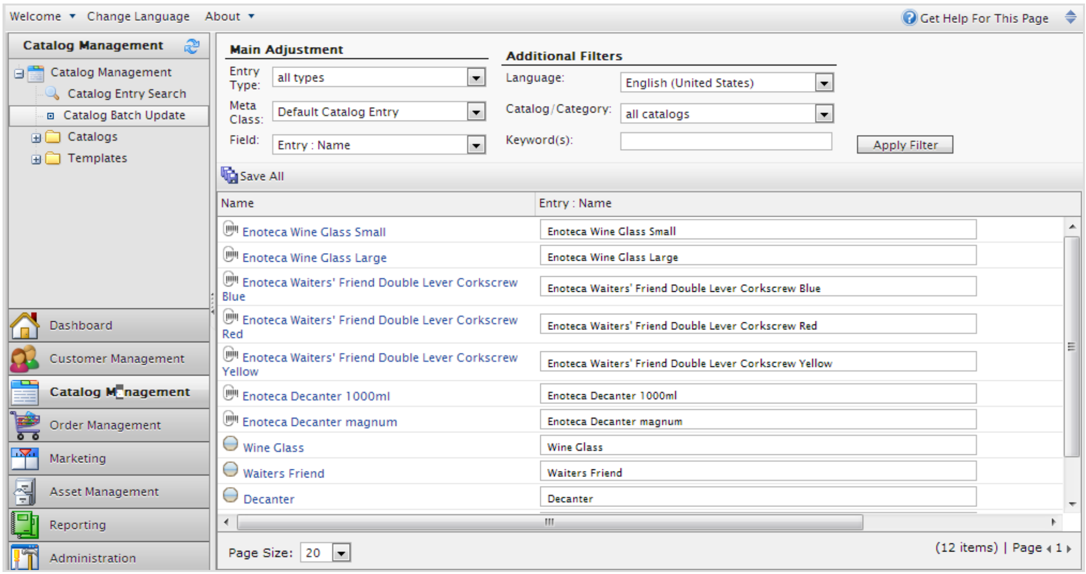
1. Go to **Commerce manager** > **Catalog Management** > **Catalog Batch Update**. The Batch Update screen appears.



- **Main Adjustment**.
  - **Entry Type**. Select **Product**, **Variation/SKU**, **Bundle**, or **Package**.
  - **Meta Class** and **Field** menu items depend on the **Meta Class** you select. Your selection populates the Field drop-down selections.
- **Additional Filters**.
  - Use the **Language** filter to select entries by language.
  - Use the **Catalog** filter to narrow the results to one catalog.
  - Enter keywords, such as *Wine Glass*, to narrow the search further.

2. Within search results, you can:
   - Select a catalog entry and go directly to its edit page.
   - Use the **Field** drop-down to edit a field across several catalog entries. For example, change the **display price** for a group of variants. Using the **Field** drop-down list, choose **Variation: Display Price**. The right column changes, letting you

update the display price for all catalog entries.



3. Click **Save All**.

Sorting catalog entries

Sorting means changing the display order of items in a category. This affects the Catalog view.

Sorting can also change the arrangement of items on your website's pages. When creating your page templates, a developer determines how to arrange the items on a page. Sort order is one option.

To sort catalog entries, follow these steps.

1. Navigate to the category that contains items you want to sort.
2. Click the **Sort** button . This enables *sort mode*.

> Note: When sort mode is enabled, a drag handle appears to the left of every eligible item's check box.

3. Select one or more items whose sort order you want to change.
4. Drag and drop items to the new position.
   Or, to sort a single item, move to its far right, click to open the context menu, and select **Move Up** or **Move Down**.

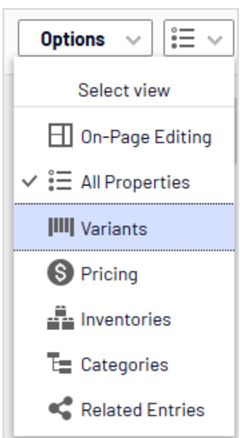
Notes about sorting

- Changing an item's sort order affects it within that category only.
- Sort mode remains enabled until you click the button a second time, even if you navigate to other categories.
- You cannot sort categories.

Sorting variants

To sort a catalog entry's variants, follow these steps.

1. Select the catalog entry whose variants you want to sort.
2. Click **Select view** > **Variants**.



3. Drag and drop variants to a new position.

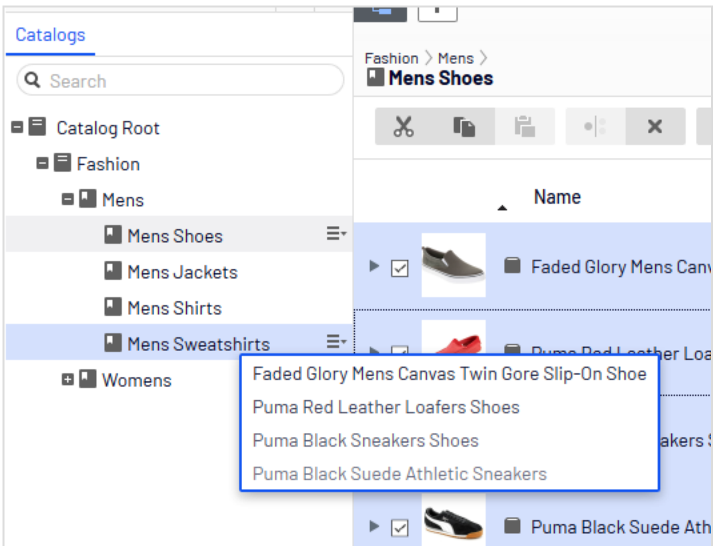
Duplicating catalog entries

You can duplicate an existing entry to create a new entry. If you do, it gets a unique ID, and you can edit the following details. You can then move the new entry to different catalog tree location.

- If you duplicate a *category*, Episerver Commerce creates a new code, name in URL, and SEO URL, based on the original. Name, internal name, and content are the same as the original. Sub-entries in the original category, such as *products* and *variants*, are not duplicated.
- If you duplicate a *product*, *variant*, *package*, or *bundle*, Episerver Commerce creates a new URL name, SEO URL, and product code based on the original. Other information (name, internal name, content, and so on) is the same as the original.

You can duplicate one or several catalog entries. The following example duplicates multiple variants and moves them to a different category.

1. Open the desired catalog or category node, so items you want to duplicate appear in the catalog item list.
2. Pin the catalog tree so it remains open.
3. Select items to be duplicated.
4. Drag selections to the desired catalog tree location.



5. The **Select Action** dialog box appears. Click **Duplicate**. The selected entries are duplicated in the selected location.

> Note: You can also use the **List** menu's **Copy** and **Paste** options to duplicate multiple entries, or the **Context** menu's **Copy** and **Paste** options to duplicate a catalog entry.

Moving catalog entries

Moving a catalog entry is the same as assigning it to a different primary category. See [Changing a catalog entry's primary category](#).

Deleting catalog entries

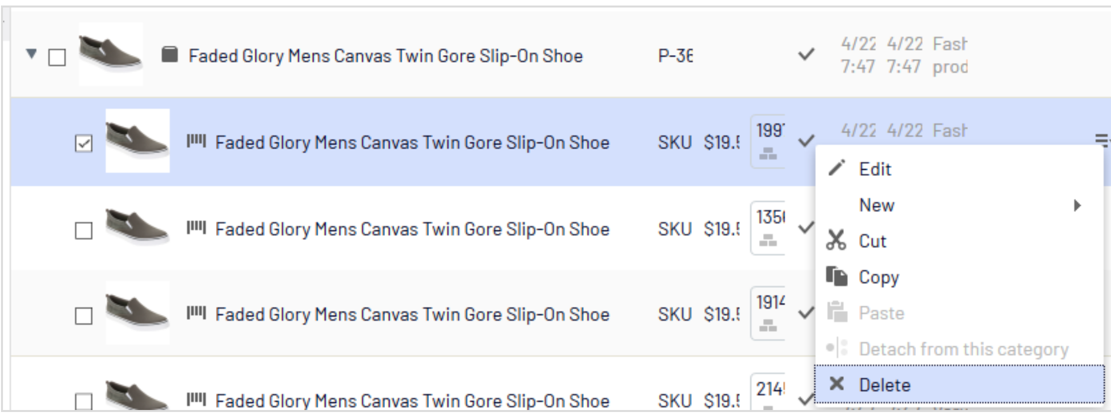
When deleting a product or a variant, the following happens depending on how the deleted entry is related to other catalog entries:

- If a product or variant is deleted, all links from other catalog entries to it are removed.
- If a product with associated variants is deleted, the variants are left associated with the deleted product's category.

See also: Deleting a package or bundle

> **Warning:** You cannot undo the deletion of catalog entries.

To delete a product or variant, select an item, open its context menu, then click **Delete**.

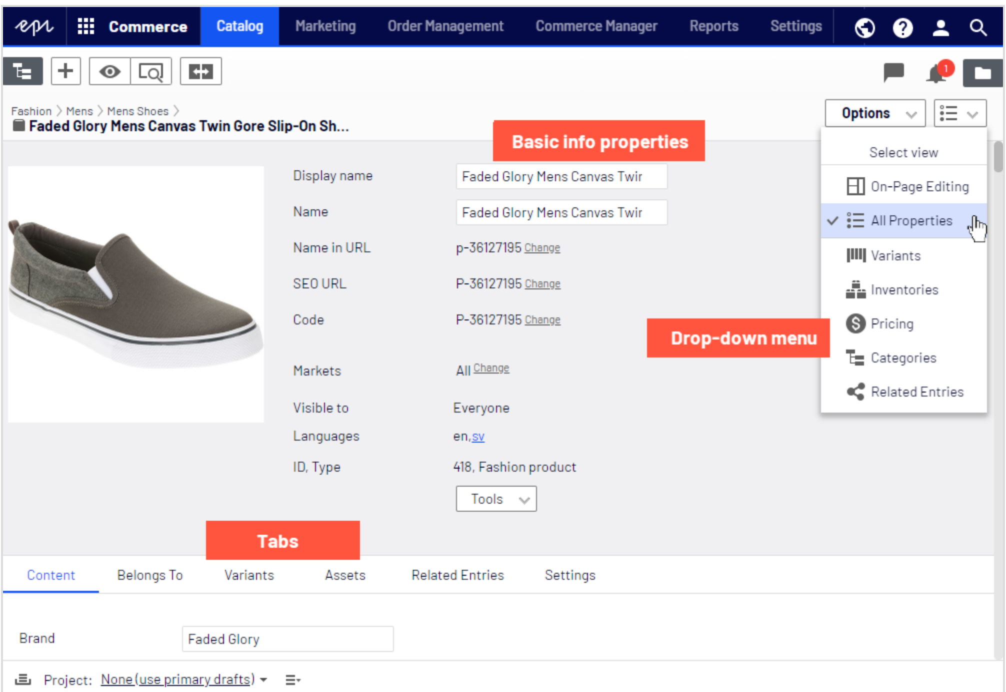


To delete multiple catalog entries at the same time, select the entries then click **Delete** in the toolbar.

Translating catalog entries

Like other types of content, catalog entries can exist in multiple languages. See Multi-language management.

Catalog entry properties



Basic info properties

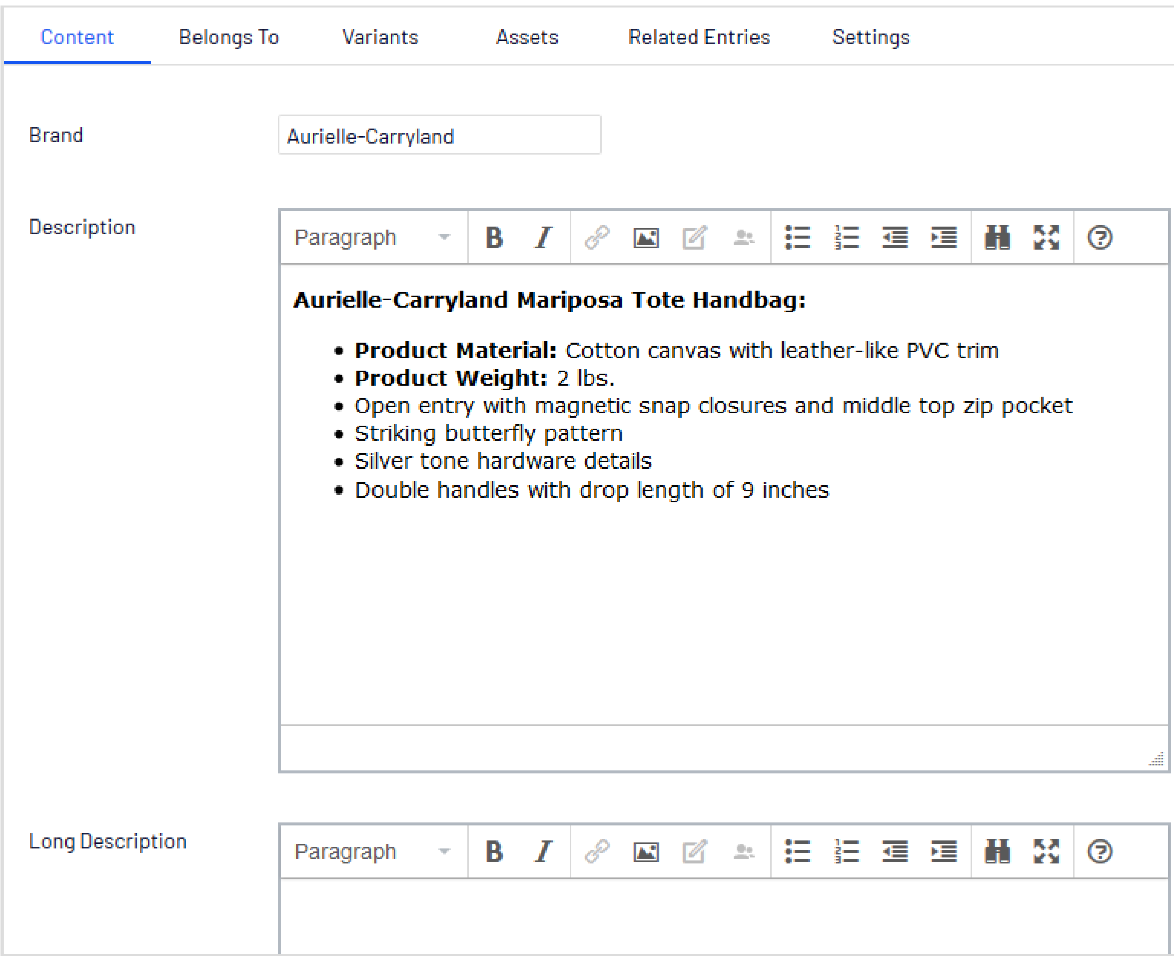
The basic info properties area provides an overview of catalog entry information. Much of it is created automatically and rarely needs to be changed, unless you manually create catalog entries. **Change** appears next to some properties. Click it to edit a property value.

- **Display name**. Name on the content display page.
- **Name**. Name in catalog item list.
- **Name in URL**. URL automatically created, based on name and place in the navigation; whether it is visible in site links depends on implementation.
- **SEO URL.** Automatically created based on **Name**; whether it is visible in site links depends on implementation.
- **Code**. Product code/identification key, often provided by an external system.
- **Market**. Markets where the item is available. By default, a product or variant is available in all markets.

- **Visible to**. Which users and groups can see the item. By default, catalog content is publicly visible and editable by CommerceAdmins group members.
- **Languages**. The content is available in the displayed languages. The active language is *not* underlined.
- **ID, Type**. The ID set by the system; the content type upon which the item is based.

Content

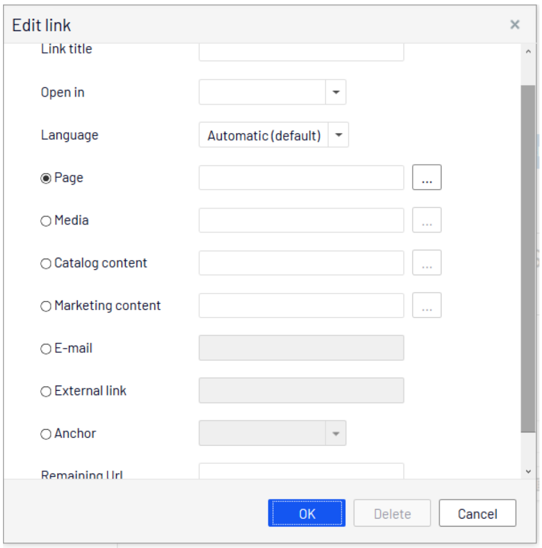
The **Content** tab properties depend on the product or variant.



Descriptions can include formatted text, images, and links, using a rich-text editor.

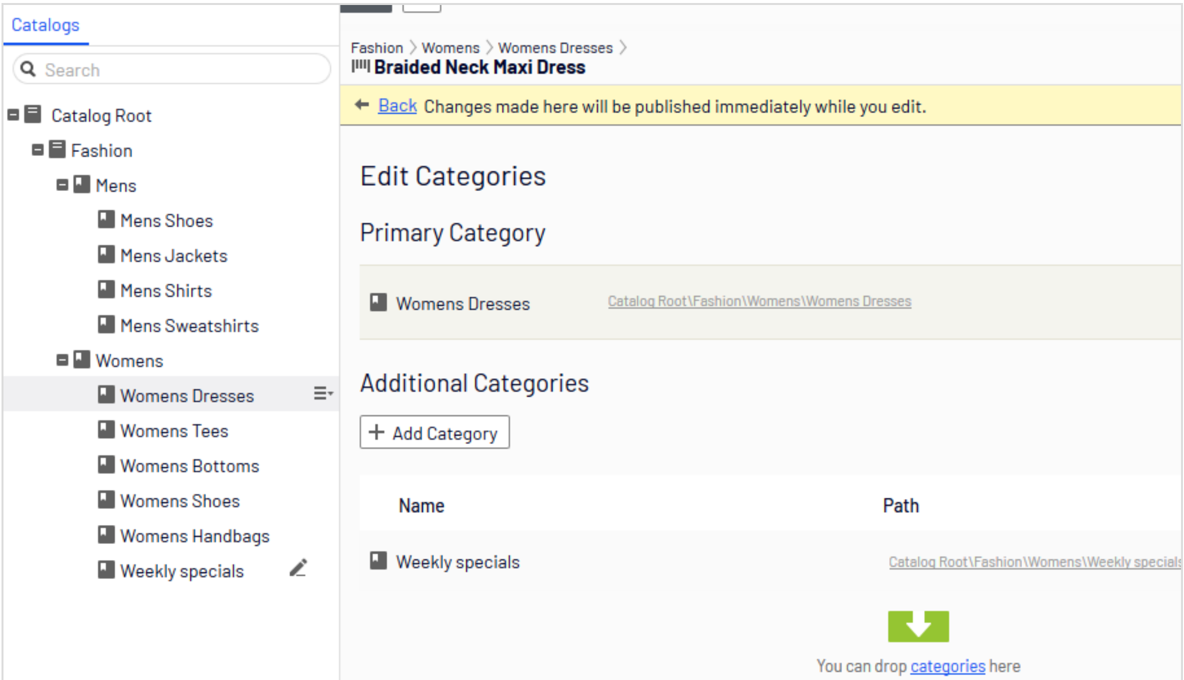
The Links dialog includes the following Commerce-specific properties:

- **Catalog content**. Lets you assign a link to any catalog entity, such as a catalog, category, product, or variant. For example, if you link to a category, when that link is clicked, a page appears listing all products in that category.
- **Marketing content**. Lets you assign a link to any marketing campaign or promotion.



Belongs To

The **Belongs To** tab displays categories and products, packages and bundles to which a product or variant belongs. For example, a variant belongs to a product and has a primary category. Also, an item may be part of a *Weekly specials* category and a *Spring package* category, as the following image shows. See also: Working with categories.



Pricing (for variants)

The **Edit Prices** view lets you view and update pricing for packages and variants. The view displays a compact list of prices, which can be filtered by market or customer group. Market filtering displays both active and inactive markets.

The same item can be available in several markets. For each market, you can define multiple currencies and establish a different price for each one. If you enter no value for any currency, users will not be able to place an order for the item in that currency.

For each product or variant, you can define the following pricing information.

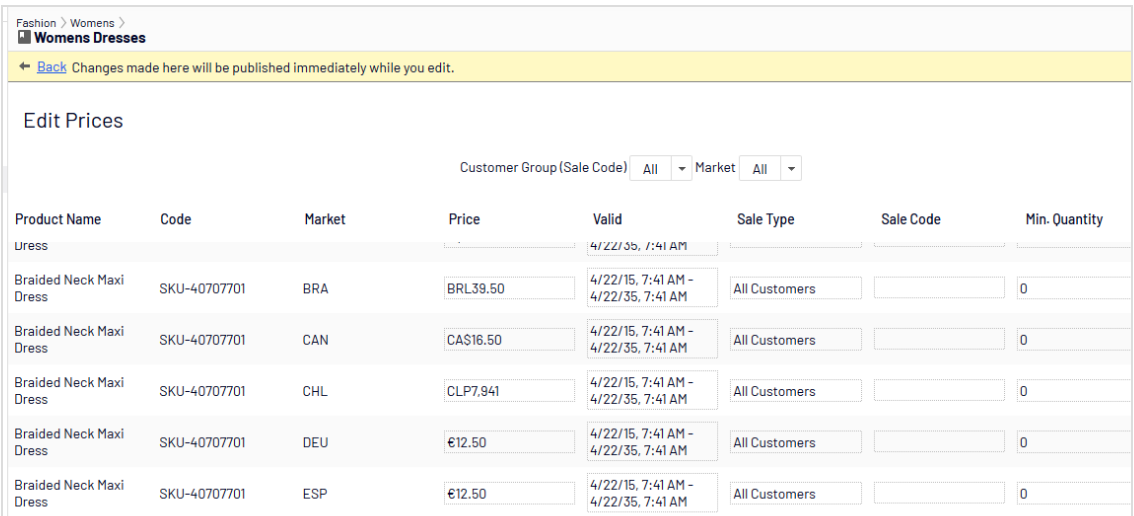
- market
- price
- valid date range
- sale type
- sale code
- minimum quantity

> Tip: In many cases, pricing information comes from an external system, which may prohibit modifications in Episerver Commerce.

> Note: Price changes are immediately available on the website. They are not part of a product's publishing workflow.

Viewing prices

1. In the catalog tree, select a category or product.
2. From the view selector in the upper right corner, click **Pricing**.



3. If desired, use the **Customer Group** and **Market** filters to make it easier to find pricing information.

> Note: Only packages or variants with a price appear on the list.

Adding and editing prices

Follow the steps in Viewing prices to access the **Edit Prices** view. From there, you can complete these tasks.

- To adjust a product's or variant's price information, modify these fields.
  - **Market**. Associate the price with a market.
  - **Price**. The item's price and currency for that market.

    > Note: The list of currencies is determined by those available for the selected market.

  - **Valid**. The time interval when this price is available.
    - To create a future price change.
      1. Select the item.
      2. Click **Duplicate** from the context menu.
      3. Change the new item's pricing information.
      4. Set the new available dates.
  - **Sale Type**. Make the price available to **All Customers**, a specific **Customer**, or a **Customer Price Group**. With the last option, you can create *tiered pricing* (also known as differentiated pricing).
  - **Sale Code**. Use this field to assign a price to a specific customer group. For example, create a new price, select **Customer Price Group** as its **Sale Type**, then insert the customer group name into the **Code** field.
  - **Min. quantity**. The minimum number of units that must be purchased to get the listed price.

    Use this feature to provide a bulk rate. For example if a customer purchases 10 or more, the cost is $50.00 each. If fewer than 10, $60.00 each.

Tops-Tunics-CowlNeck-Black-ExtraLarge	Tops-Tunics-CowlNeck-Black-ExtraLarge	ASEAN	$60.00	Sep 1, 9:00 AM -	All Customers		0
Tops-Tunics-CowlNeck-Black-ExtraLarge	Tops-Tunics-CowlNeck-Black-ExtraLarge	ASEAN	$50.00	Sep 1, 9:00 AM -	All Customers		10

- From a product's or variant's context menu:
  - click **Duplicate** to create a copy of price information, which you can then modify to create a new pricing setup.
  - click **Delete** to remove a set of price information.

    > Warning: You cannot undo the deletion of price information.

Setting customer group pricing

Use Customer Groups to set permissions and create targeted marketing campaigns.

Prerequisite: Customer groups are created in Commerce Manager.

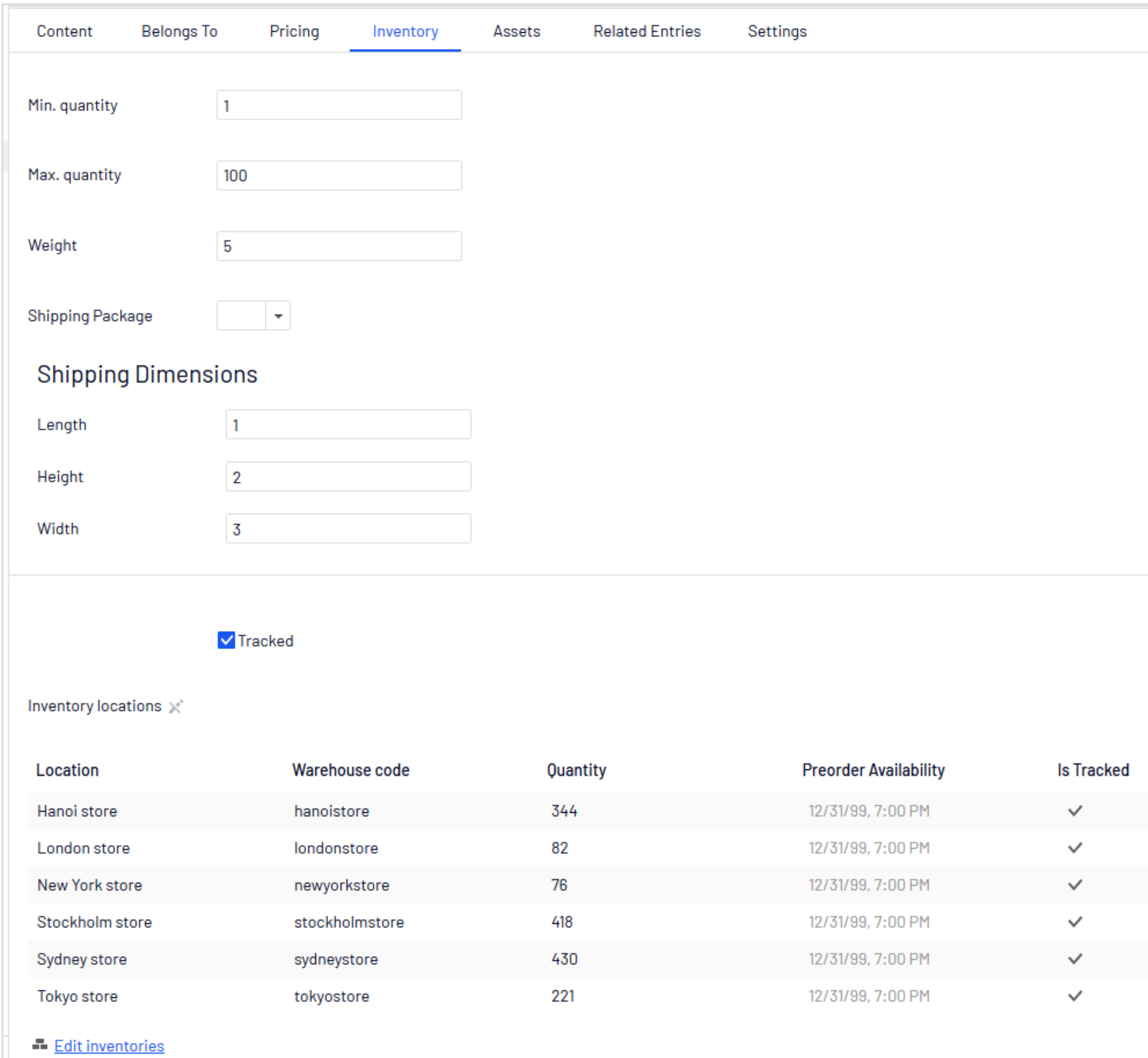
To create a customer group price:

1. Follow the steps in Viewing prices to access the **Edit Prices** view.
2. In the Edit Prices view, click **Add Price**.
3. Click **Customer Price Group**.
4. Select the customer group to which the price applies.

Inventory (for variants)

Inventory information is often transferred from an external system, so you rarely need to change it. Sometimes you cannot edit it. On other sites, you can update quantities but the other information is read-only.

Inventory screen



When first viewing a variant's inventory information, you have access to the following information.

- **Min. quantity**. If desired, set a minimum number of this variant that a customer must buy. If a customer adds fewer than this to a cart, the quantity will be increased to the minimum during cart validation.
- **Max. quantity**. If desired, set a maximum number of this variant that a customer can buy. If a customer adds more than this to a cart, the quantity will be decreased to the maximum during cart validation.

- **Weight**. Enter the variant's weight in your system's weight unit. Weight is used to calculate shipping costs.

> Note: Weight unit (kilograms or pounds) is set in **Administration** > **System Settings** > **Common settings**.

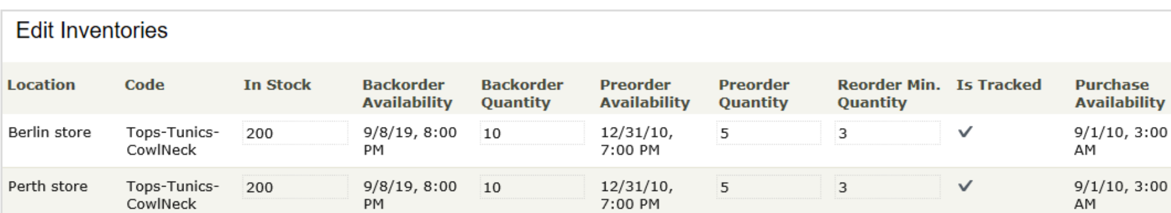
- **Shipping Dimensions**
  - **Length, Height, Width**. Enter the variant's length, height and weight in your system's length unit. These properties may be used to calculate shipping costs.

> Note: Length unit (centimeters or inches) is set in **Administration** > **System Settings** > Common settings

- **Tracked**. If this variant is Tracked, the inventory system is checked for sufficient quantity when someone orders the item. If the variant is not Tracked, orders are filled without referencing the inventory quantity.

  Note that each inventory for this variant also has an **Is Tracked** field. The inventory check is made only if *both* values are true.

Edit inventory screen



Edit Inventories

Location	Code	In Stock	Backorder Availability	Backorder Quantity	Preorder Availability	Preorder Quantity	Reorder Min. Quantity	Is Tracked	Purchase Availability
Berlin store	Tops-Tunics-CowlNeck	200	9/8/19, 8:00 PM	10	12/31/10, 7:00 PM	5	3	✓	9/1/10, 3:00 AM
Perth store	Tops-Tunics-CowlNeck	200	9/8/19, 8:00 PM	10	12/31/10, 7:00 PM	5	3	✓	9/1/10, 3:00 AM

You can view (and possibly edit) the following inventory properties for a product or variant.

- **Location**. The physical stock location of the inventory, as defined in warehouse settings.
- **Code**. Product code/identification key; often provided by an external system. Read only.
- **In Stock**. The quantity of in-stock items for an inventory.
- **Backorder Availability**. If customers can backorder this item, enter the first date when it is possible.
- **Backorder Quantity**. The quantity of this item which may be backordered.

- **Preorder Availability**. If customers can preorder this item, enter the first date when it is possible.
- **Preorder Quantity**. The quantity of this item which may be preordered.
- **Reorder Min. Quantity**. The in-stock quantity level at which items should be reordered. For example, when an inventory location has three or fewer items, it is time to order more.

  The Low Stock Report uses this value to inform a merchandiser that it is time to reorder. Also, a custom implementation could send email or another alert when in-stock quantity reaches this amount.

- **Is Tracked**. If selected, shoppers can only complete orders for this product/variant if you provide inventory information from the Inventory Locations. If **Is Tracked** is not selected, orders can be placed without inventory amounts.

  > Note: Each variant also has an **Is Tracked** field. The inventory check is made only if the variant-level **Is Tracked** field and this one are true.

- **Purchase Availability**. First date and time when this item can be sold from this inventory.

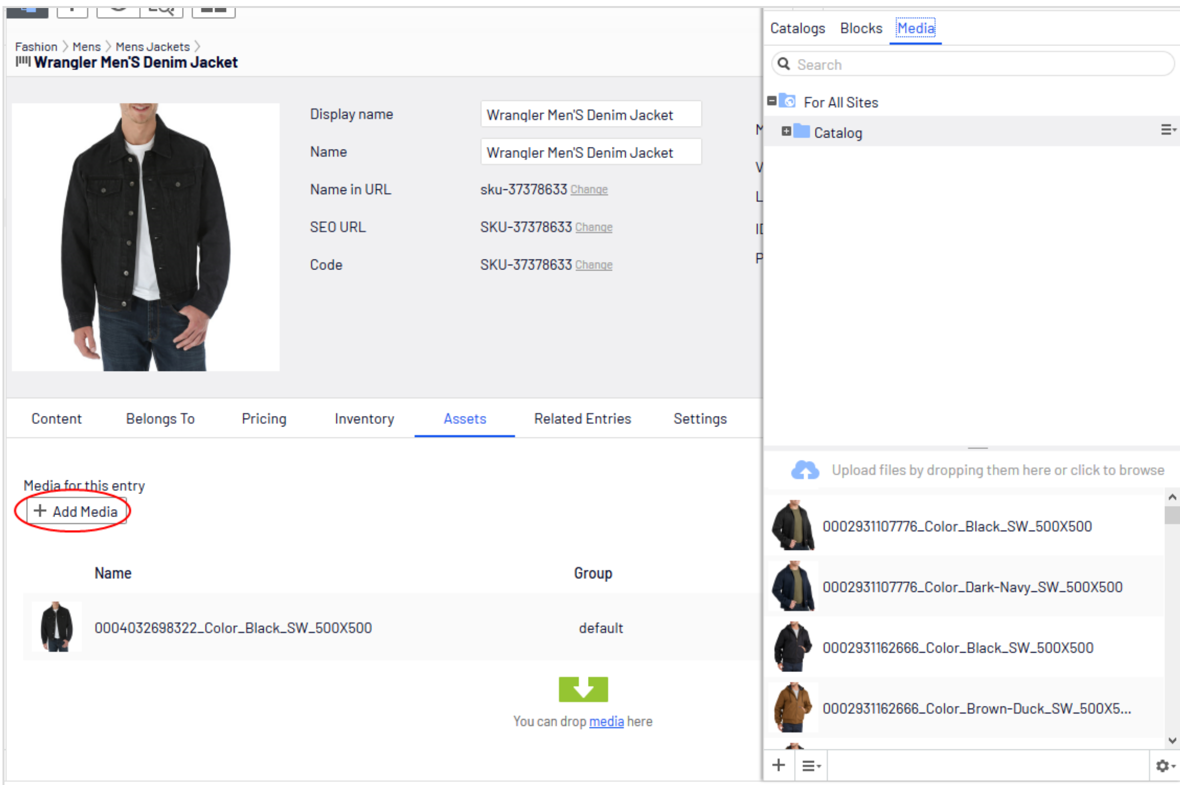
Variants (for products)

A variant is a version of a catalog entry with specific characteristics, such as price, size, and color. You can perform most of the tasks on a variant that you can perform on a catalog entry. See also: Working with catalog entries.

Assets

Use the **Assets** tab to link a catalog entry to a media file, such as an image or a document (PDF for example). For example, you want to assign a picture to a catalog entry to accompany its website description.

To add a media file, open the **Assets** tab, then drag the file from the **Media** tab to the **Assets** tab. Or, click **Add Media** and select the file.



When assigning media files to a variant, you can assign them to a group, such as *Banner*. You can then sort the files by clicking the **Group** column header.

To rearrange items in the list, click **Move Up** or **Move Down** from the context menu.

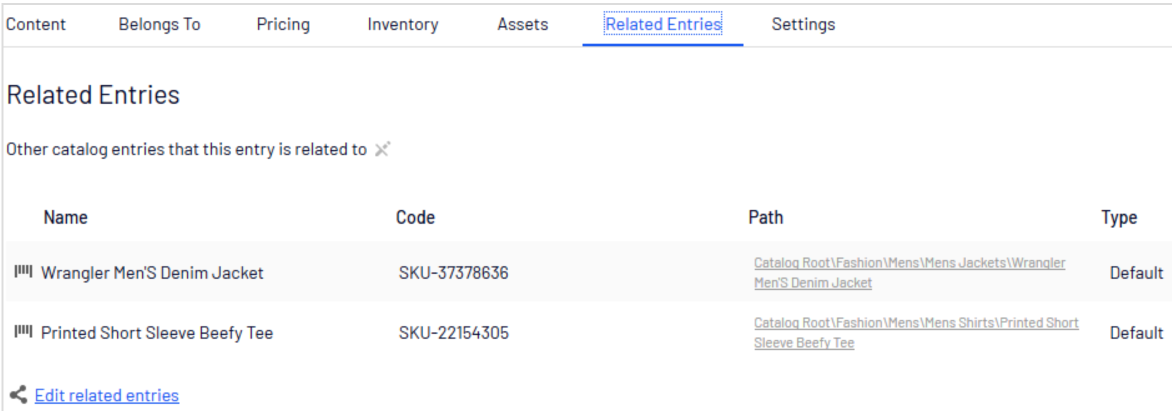
On the sample site, the item assigned to the default group at the top of the list is used for the main display.

Related entries

The **Related Entries** tab lists catalog entries related to the current one. Typical relationship types are cross-sell and upsell. The types are set up by your developer during implementation.

Here is a typical *cross-sell* scenario: If a site customer views a page with a specific television model, a section of that page is titled "People who bought this also bought". That section shows HDMI cables and wall mounts that fit that TV model.

To set up those relations, an Episerver Commerce merchandiser navigates to the television, clicks its **Related Entries** tabs, and adds suitable cables and wall mounts using the type **cross-sell**.



Settings

Settings is a default tab with several built-in, date-related properties that you rarely need to change.

Working with categories

By applying a category to a product, you can adjust a catalog's structure and range to optimize the selling potential of its products. You can also

- Create new categories
- Edit or delete existing categories
- Change a product's primary and secondary categories

> Note: When managing a catalog, consider the maintenance and performance of its structure. Do not create hierarchies of categories, products, or variants that are too deep. On the other hand, a flat catalog structure with too many entries in a category can negatively impact performance.

Categorization involves the following tasks.

- **Move**. Lets you restructure a catalog by moving a catalog entry to another primary category; related products and variants are also moved. Links to other categories and catalog entries are kept intact. See Moving catalog entries.
- **Duplicate**. Creates a copy of a catalog entry in a new catalog location. See Duplicating catalog entries.

- **Link**. Another term for or assigning additional categories. See Assigning additional categories.
- **Detach**. Removes a link.

Creating a category

A category is typically used to organize catalog entries. For example, women's shoes. Categories can also have their own rich content, including assets and descriptions of *wine regions* for a subset of wine products.

1. From the **Commerce** > **Catalog** interface, navigate to the catalog or category node where you want to create the new category.
2. Choose **+** > **Category**. Or, from a catalog node, click to open the context menu and select **New** > **Category**.
3. Enter a **name** for the category.
4. Complete the category properties. See also: Catalog entry properties. The system saves the category automatically, but it is not available on the website until published.

Viewing an item's categories

To view an item's categories, select a catalog entry, click **Properties** then the **Categories** tab.

View items assigned to a category

To view all items assigned to a category, select it from the catalog tree. Its items appear in the center of the screen.

Editing a category

1. In the **Catalog** tree, select the desired category.
2. From the context menu, click **Edit**.
3. Update the category information you want to change, such as the name, SEO information, or description. See Catalog entry properties for information about editable properties.
4. Publish the changes, or schedule for later publishing using the save and publish flow for content.

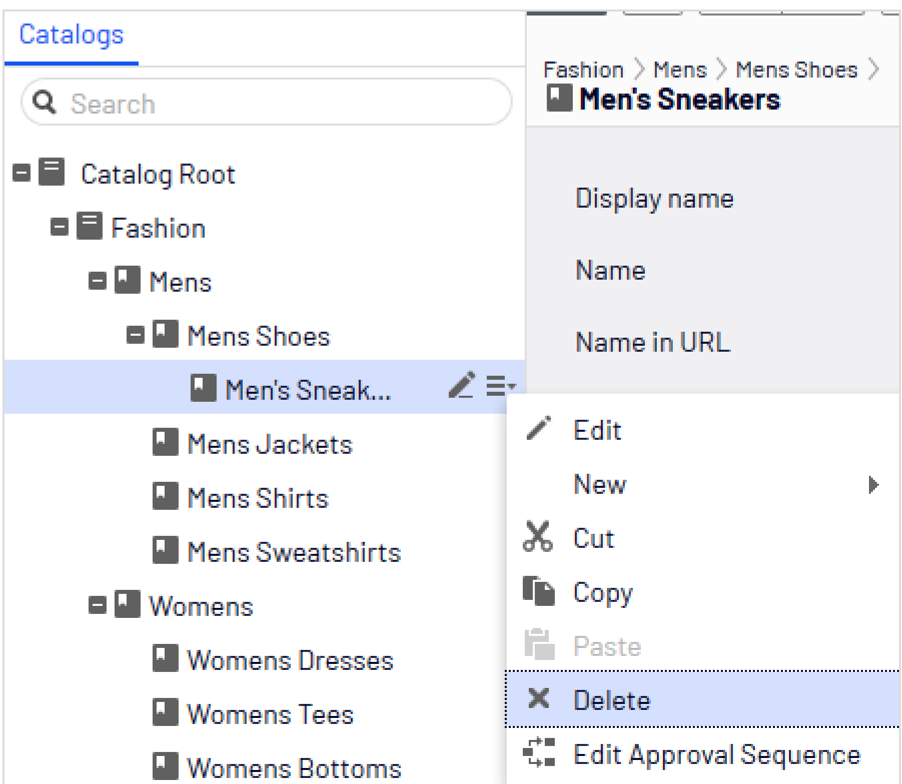
Deleting a category

If you delete a category, the following happens, depending on how the category is linked to catalog entries or other categories.

- If a category is linked to other categories, links to that category are removed, while other category links are left intact.
- Categories, product, and variant that are linked *only* to the category being deleted (and no other categories) are also deleted.

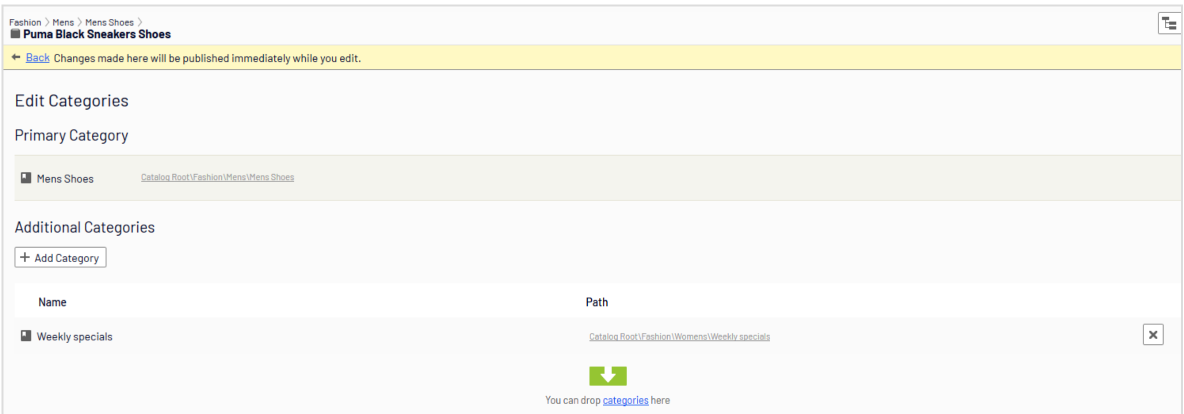
> Warning: After deleting a catalog entry, you cannot recover it.
>
> If you delete a category with many subitems, the deletion may take a while.

To delete a category, select it in the catalog tree, click **Delete** from the context menu, and click **Delete**. Alternatively, you can click **Delete** from the context menu in the catalog item list, or from the upper menu.



Primary and additional categories

You can assign to a catalog entry one primary category and any number of additional categories. They appear on the product's **Categories** and **Belongs to** views.



The primary category is the product's *home* location, which means that the product is located in this category. If a product's URL is based on the **Name in URL** property, the URL uses the primary category path (see example above). If you move a product, its primary category changes, and its URL changes accordingly.

Any product can also be linked to *additional categories*. For example, consider "Men's Black Puma Sneakers." Its primary category is "Men's Shoes". Assume you are running a summer sale and want to include Black Puma Sneakers. To do that, create a "Summer Sale" category and assign "Men's Shoes" to it as an **Additional Category**. If you create a Summer Sale page and place all items in that category on that page, the Black Puma Sneakers will appear.

Assigning a primary category

When Creating a catalog entry, you typically first select its category. That becomes the entry's primary category.

Changing a catalog entry's primary category

Follow these steps to change a catalog entry's primary category.

1. Pin the catalog tree so it does not move.
2. Select the catalog entry whose primary category you want to change.
3. Drag it to the new primary category.
4. The **Select Action** dialog box appears. Click **Move**.

As an alternative, you can

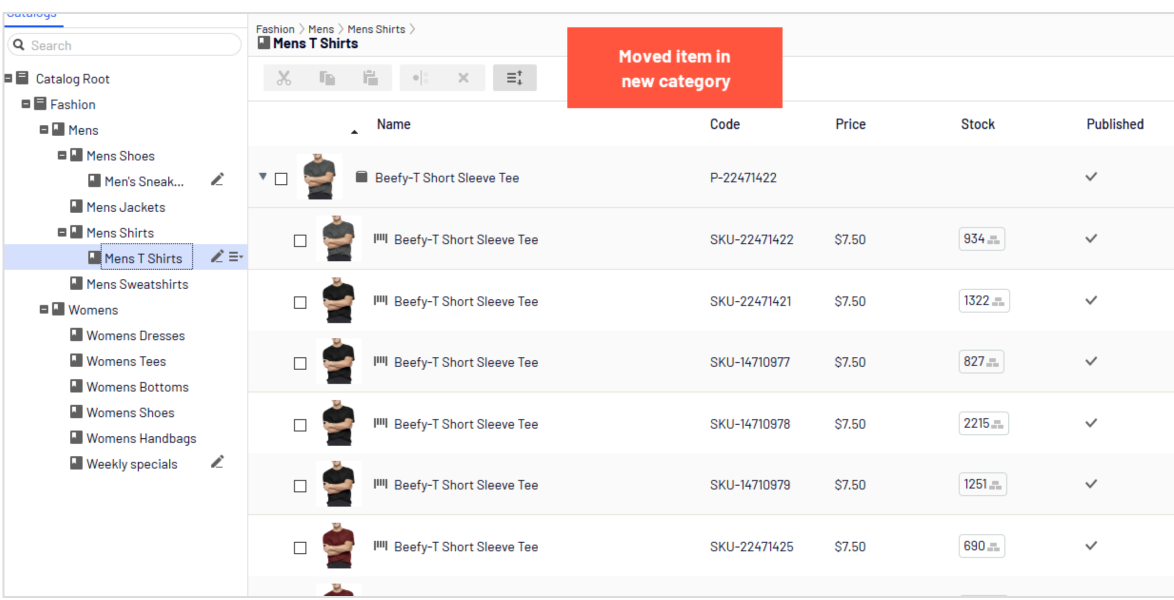
1. Select the catalog entry.
2. Select **Cut**.
3. Move to the new category.
4. Select **Paste**.

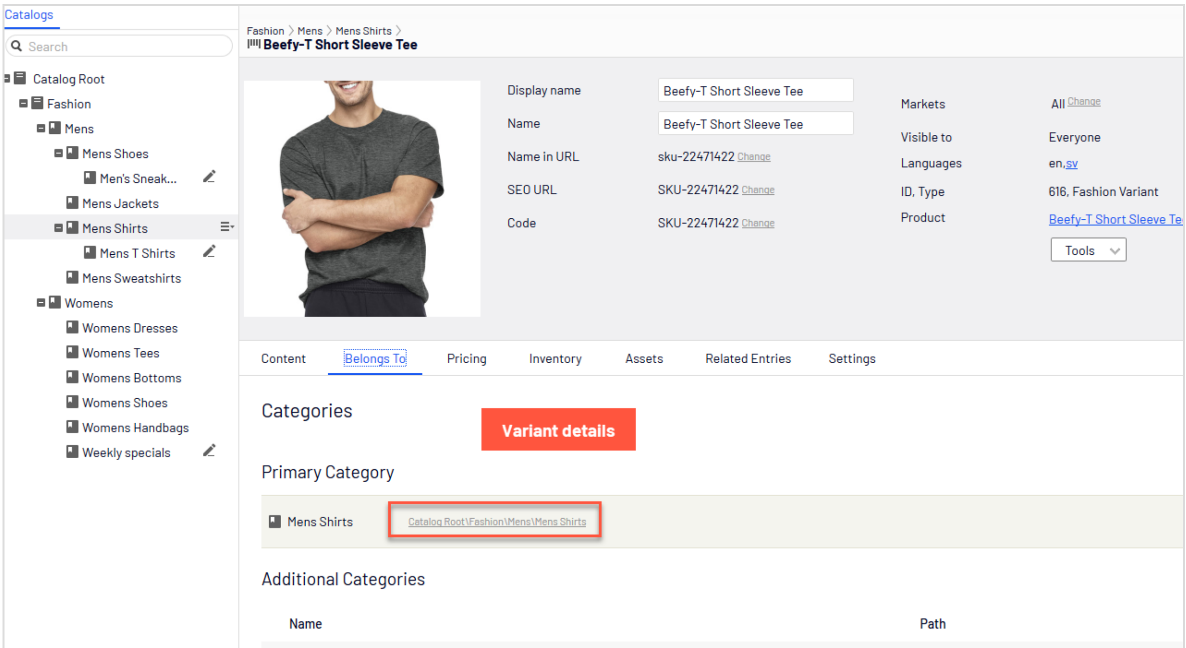
How changing an item's primary category affects its variants

If you move a catalog entry, its variants keep their previous primary category. If you expand the moved catalog entry in its new category, you see its variants, which implies that the variants were also moved to the new primary category. However, the primary category of the variants was not changed.

If you want to move a catalog entry *and* its variants, expand the entry, then select it and all variants before moving.

As shown in the example below, the Beefy-T Short Sleeve Tee was moved from the **Mens Shirts** node to the **Mens T Shirts** node. If you expand Beefy-T Short Sleeve Tee in **Mens T Shirts** node, the variants appear as children. But the primary category of the variants remains **Mens Shirts**.





Assigning additional categories

Any product can be linked to *additional categories*. For background information, see Primary and additional categories.

1. Navigate the category structure until the item to be linked appears in the catalog item list.
2. Click the **Select view** button  then **Categories**.
3. Click **+ Add Category**.
4. Navigate to the category you want to add and click **Add**.

As an alternative, you can

1. Select the catalog entry.
2. Select **Copy**.
3. Move to the new category.
4. Select **Paste**.
5. In the **Select Action** dialog box, choose **Link**.

Editing additional categories

To edit a category entry's additional categories, follow these steps.

1. Navigate to the category entry whose additional categories you want to edit.
2. Click the **Select view** button then **Categories**.
3. To *add* an additional category, click **+ Add Category**.

   To *remove* an additional category, click the corresponding Remove button.

Assigning a category to another category

You can assign a category to another category. If you do, all catalog entries linked to the original category are also linked to the new category. See also: Primary and additional categories.

To assign a category to another category, follow these steps.

1. Navigate to the category to which you want to assign an additional category.
2. Click the **Select view** button then **Categories**.
3. Click **+ Add Category**.
4. Navigate to the category you want to add and click **Add**.

Packages and bundles

Packages and bundles let you combine several items under one "umbrella" item. But their behavior and usage are quite different.

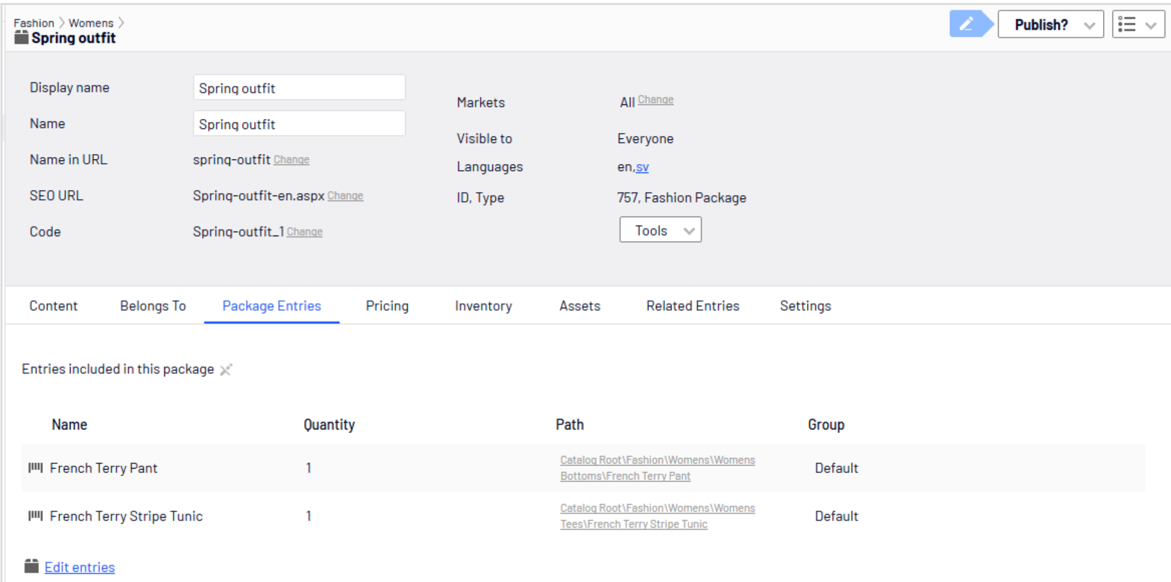
- A package contains one or more variants, other packages or both, and has a *single SKU and price*. A package is a single line item in a shopping cart.
- A bundle is a collection of packages, products, and variants, *each of which is priced individually*, allowing customers to purchase several items at once. Each item in a bundle is a separate line item in a shopping cart. Once added to a cart, a bundle item is treated like any other cart item.

Working with packages

Like other catalog entries, packages have tabs and menu options that let you view and edit their information. To learn about most settings, see Catalog entry properties. Because packages have an SKU and price, the **Pricing** and **Inventory** tabs are available with them.

The **Package Entries** tab, unique to packages, shows the variants and other packages that make up a package. On that tab, click **Edit entries** to update a package's items.

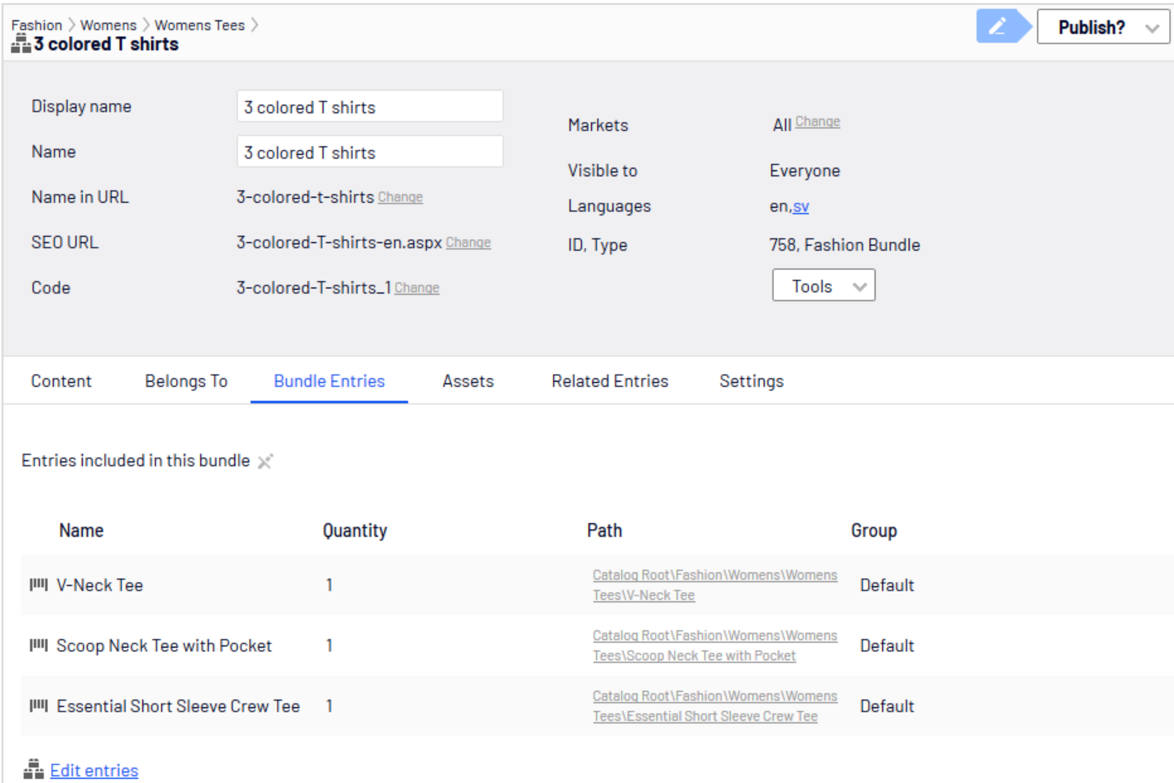
Click **Manage Entry Groups** to add entry groups with which to associate a package's items.



Working with bundles

Like catalog entries, bundles have tabs and menu options that let you view and edit their information. To learn about most settings, see Catalog entry properties. Because bundles do not have an SKU or price, the **Pricing** and **Inventory** tabs are not available with them. You can associate bundle entries with entry groups as you can with packages.

The **Bundle Entries** tab, unique to bundles, shows the entries included in a bundle.



Click **Edit entries** to edit information about a bundle's packages, products, and variants. From that view, click **Add Entry** to add items to a bundle.

Deleting a package or bundle

If you delete a package or bundle, all links to it from related products and variants are removed.

> Warning: After deleting a package or bundle, you cannot recover it.

- To delete a package or bundle:
  1. Open the item's context menu.
  2. Click **Delete**.
  3. Click delete to confirm.
- To delete multiple catalog entries at once, select them from the item list and click **Delete** from the toolbar.

How the Campaigns feature considers packages and bundles

The Campaigns feature treats a package like any other SKU. Since a package has its own price and quantity, any reductions are made to the package. The Campaigns feature ignores the individual items in a package.

The Campaigns feature does not recognize bundles. It only recognizes the individual SKUs that make up a bundle.

Managing multiple content versions

Episerver Commerce handles content versioning in a similar manner to Episerver CMS, but there are important differences.

> Tip: To learn how Episerver CMS handles content versioning, see Working with versions.

Multiple language support

Episerver Commerce generates a version for every enabled language automatically. For example, if you create a catalog entry that supports multiple languages, Episerver Commerce generates a version for each language. In Episerver CMS, to add a language-specific version, you must first translate the content.

Managing content versions during import

See Managing content versions during import.

Determining the number of versions saved

By configuration, the UIMaxVersions attribute defines the maximum number of page versions that Episerver will retain. You can use a scheduled job (Trim Content Versions) to eliminate old catalog versions.

Orders

Order management is a central part of the e-commerce system. Since the majority of orders are created from the front-end site, the ordering process is usually automatic, following an order management workflow. In some cases, orders need to be manually managed. You do this via the Order Management screen

Order Management in Commerce Manager provides shopping cart (baskets), order capture, order fulfillment, payment functions and item return or exchange support.

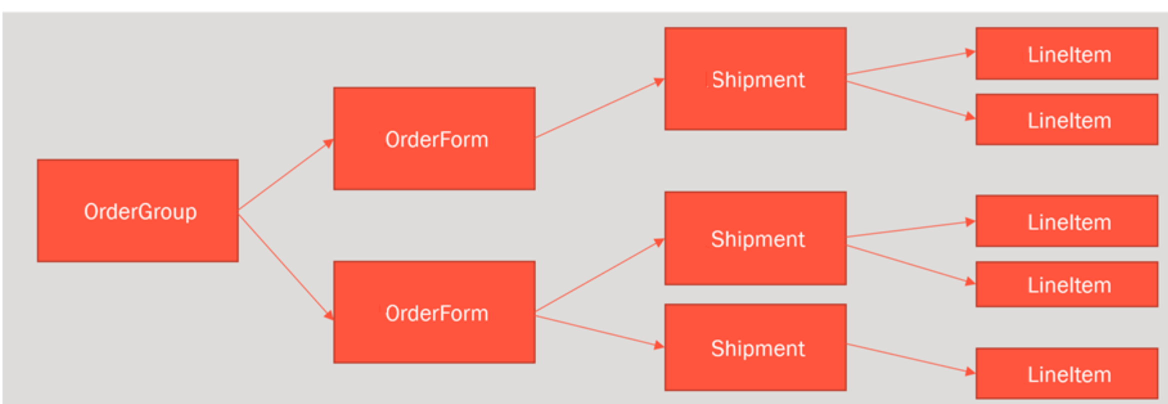
Carts versus orders

A *cart* is for a buyer, who selects items then proceeds to check out.

After the buyer completes payment, the cart is converted to purchase order. At that point, it is processed by the seller, who performs actions such as: arranging shipment via picklists, delivering the product, and completing the order.

Structure of orders

The structure of a shopping cart or order is depicted below.



So, a cart or an order can contain one or more order forms. In most cases, there is only one form per cart or order. As an example of when multiple forms may be used in an order, in some B2B sites, one person places an order for different sections of an organization. Each section has its own form, with separate details.

Each order form can have one or more shipments, and each shipment is made up of one or more line items.

Order meta-classes and meta-fields

You can define your own meta-classes and meta-fields for both product and orders in Commerce Manager. For example, if you create a meta-class called *Wine*, you want to add meta-fields that are characteristic for wine, such as *color*, *taste*, *vintage* and *maturity*.

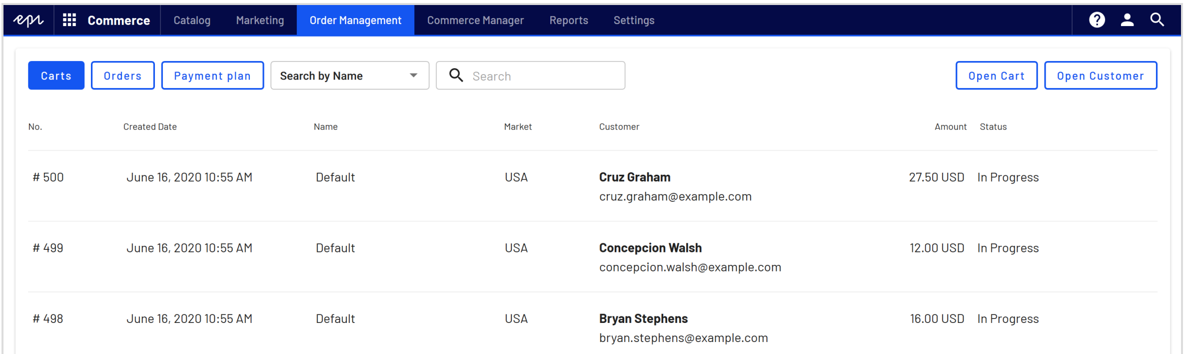
When you create meta-fields and meta-classes, you can use them in the product catalog. Meta-classes and meta-fields for catalogs are defined in the **Catalog System** part of **System Administration**. See also: Catalog meta-classes and meta-fields.

Order Management screen

The Order Management screen lets your order support team identify and perform common tasks on shopping carts and purchase orders. See also: Carts versus orders. For example, you can add or remove line items as well as update their quantity. You can also update customer information and work with payment plans.

> Note: Only members of the Commerce admins groups or the Customer Service Representatives role see this screen. To learn about roles, see Commerce-specific virtual roles.

To access the Order Management screen, click **Order Management** from the Commerce top menu.



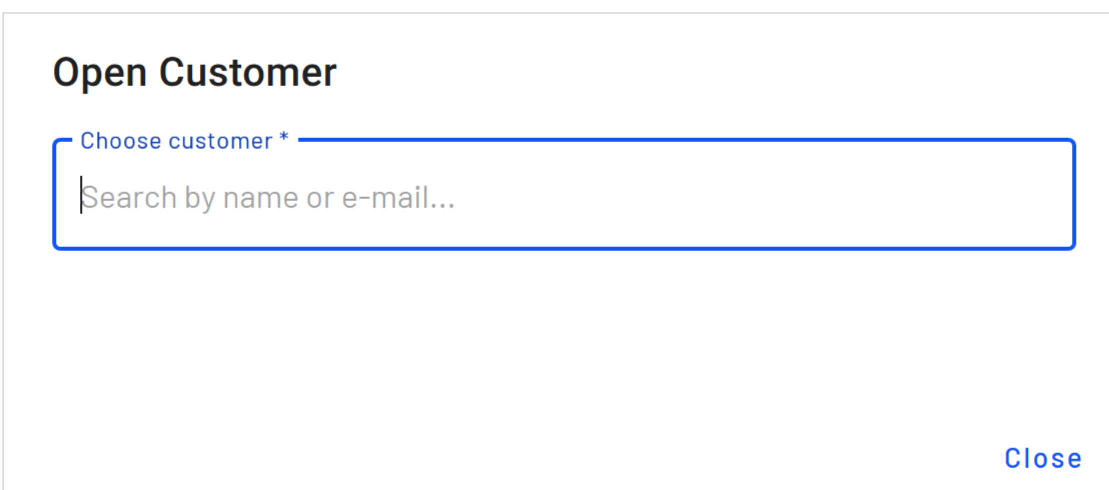
Viewing and updating customer information

This topic describes how to find customers and viewing and updating customer information on the Order Management screen.

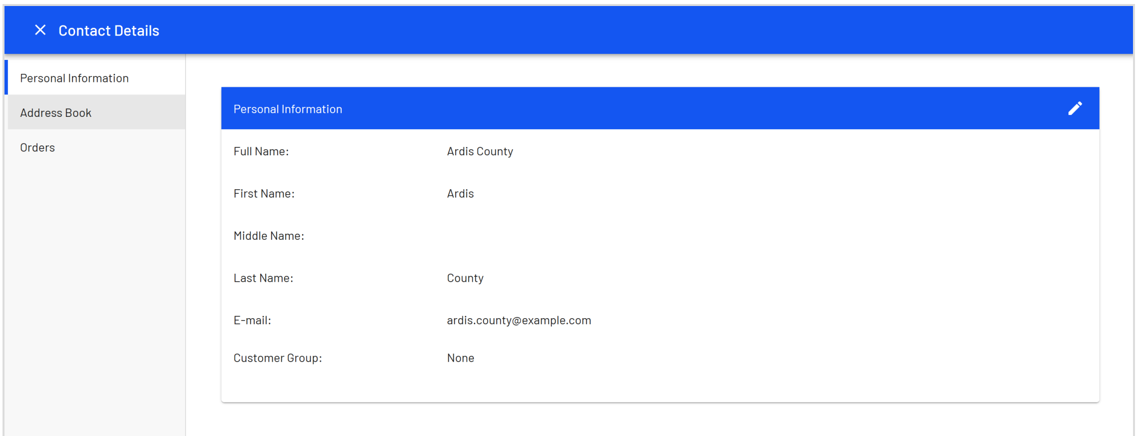
Searching for customers

To quickly find a customer, follow these steps.

1. From the Order management screen, click **Open Customer**.
2. In the **Choose customer** field, enter any portion of the customer's name or email address. As you enter more characters, you get fewer search results.



3. A list of customers whose name or email address include those characters appears.
4. Choose a customer.
5. The **Contact Details** screen for that customer appears.



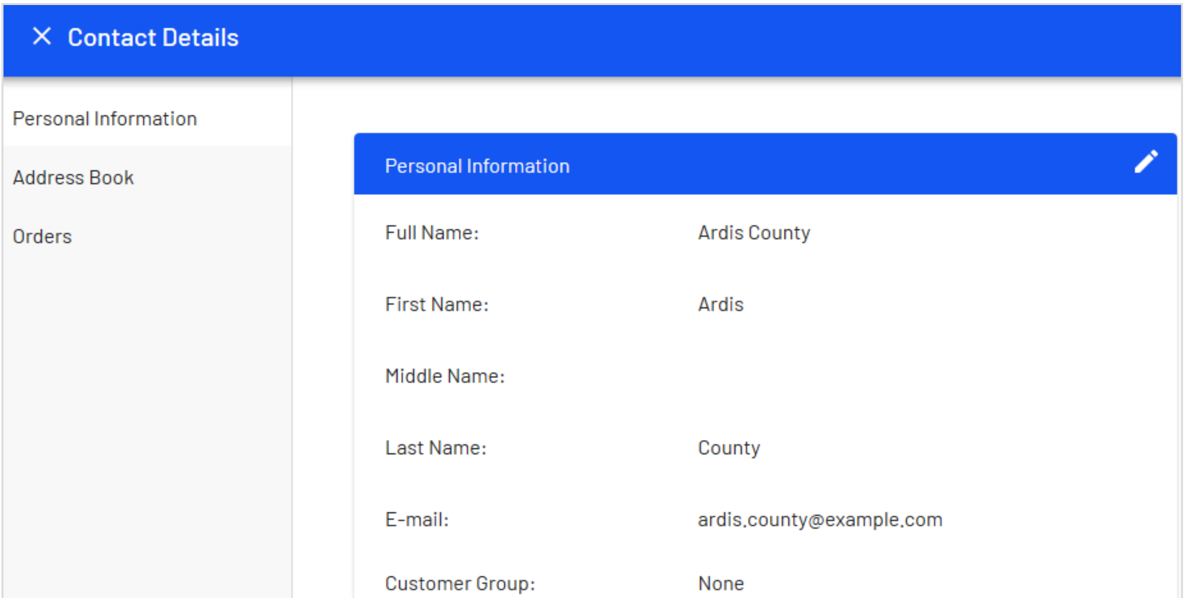
Updating customer information

You can also view and update customer information from the **Contact Details** tab, available from the **Cart Details** and the **Order Details** screens. To do so, click the edit icon next to **Customer Information**.

The **Contact Details** screen appears with three tabs: **Personal Information**, **Address Book**, and **Orders**.

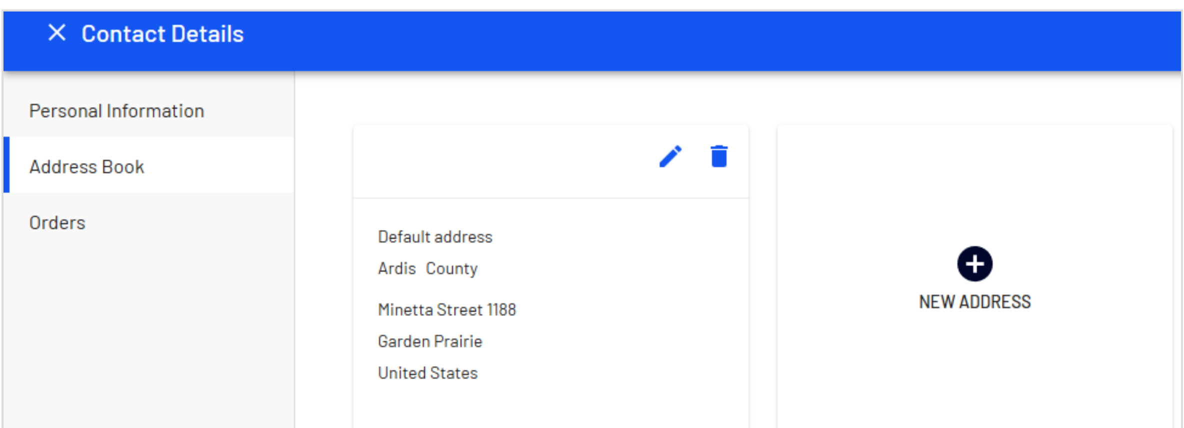
Personal Information tab

You can edit the customer's name, email address, and customer group.



Address Book tab

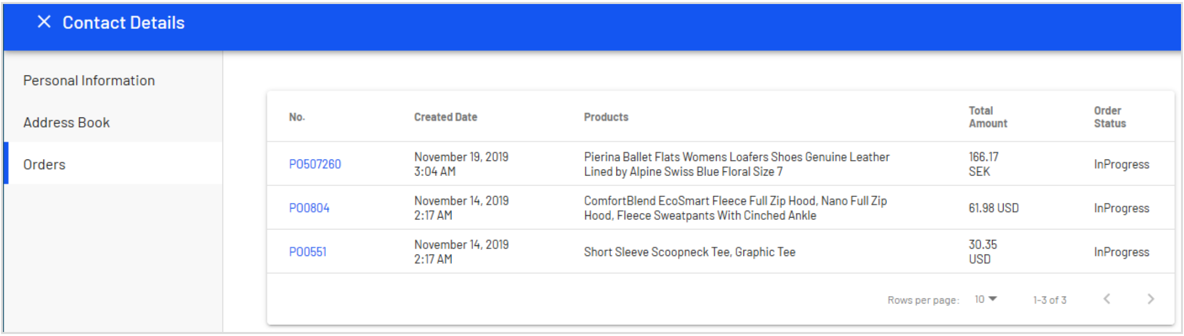
Initially, you see all of a customer's addresses.



You can edit or delete an existing address, or enter a new one. You may designate one address as the preferred billing address, and the same or a different one as the preferred shipping address.

Orders tab

The **Orders** tab shows a customer's order history in reverse chronological order.



You can click any order to see and edits its details. See Working with purchase orders.

Working with carts

This topic describes how to work with carts on the Order Management screen.

A visitor creates a shopping cart when the visitor clicks **Add to basket** option on any page. You can manually create and manage a shopping cart from **Order Management** > **Carts** where you can view registered and anonymous customer carts and manually convert a cart into a purchase order. See also: Shopping process flow.

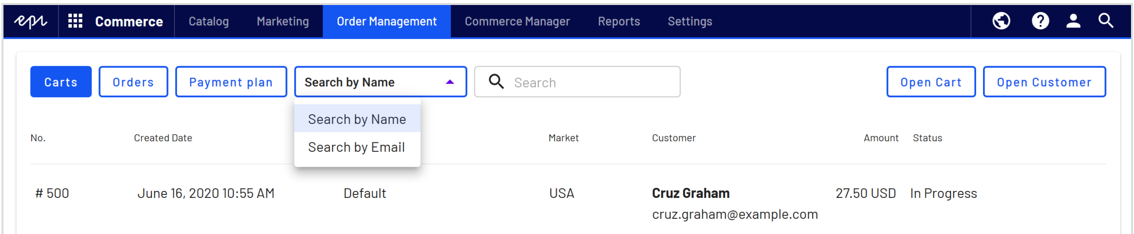
Each shopping cart is unique and has its own ID. A customer can have only one cart open at a time. So, if the customer already has a cart open, the system redirects to the open cart.

When a cart's checkout is complete and payment is submitted, the cart is converted to an order. At that point, the cart disappears from the **Carts** list, and appears in the purchase order list.

Searching for carts

You can search for carts by customer name (partial match) or email address (exact match).

1. In the top left corner of the Order Management screen, click the **Carts** button.
2. In the **Search by** drop-down, select **Search by Name** or **Search by Email**.



- If you chose **Search by Name**, move to the **Search** box and begin entering the customer's first name. For example, if the customer name is *Bryan Stephens*, enter *B*, *Br*, or *Bry*. Press **Enter** to execute the search.
    - You can enter the entire name, but this takes longer.
    - As you enter more characters, you get fewer search results.
    - You cannot find a customer by entering the last name. To continue the example, you cannot find Bryan Stephens by entering *Ste*.
- If you chose **Search by Email**, enter the exact email address. Partial entries are not valid.

3. Carts that match your search criteria appear.

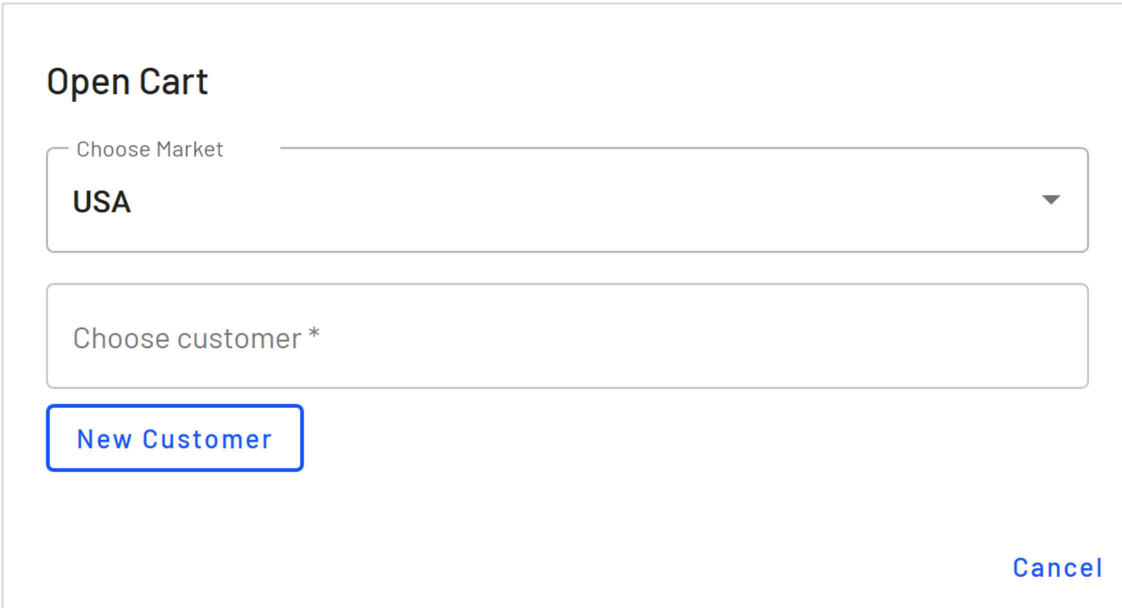
The Order Management screen initially lists all shopping carts in reverse numerical order. Scan the screen to find the cart you are interested in.

Open Cart dialog box

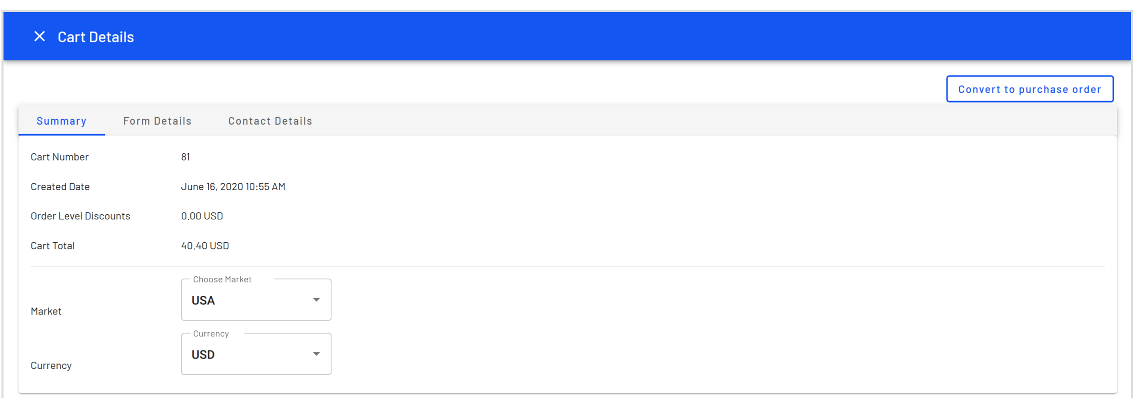
You can also search for shopping carts by customer name or email address:

1. Click **Open Cart**.

2. Select a market for the cart.



3. Enter any part of the customer's name or email address. A list of matching customer names appears.
4. Select the customer.
5. The **Cart Details** screen opens.



Note: If no cart exists for the selected customer and market, you can create one by clicking **Create a cart**.

Viewing a cart

The **Cart Details** screen shows the following information about the selected shopping cart. After viewing this information, you can edit the cart's details.

Information at the top of the screen:

- Cart name
- Market and currency
- Customer name
- Total amount of charges
- Cart status

Summary tab

- Cart number
- Cart created date
- Order level discount amount
- Total amount of charges
- Currency and market

Form Details tab

- The form in the cart (See also: Structure of orders)
  - Shipments in each form
    - Shipping address. See Selecting a shipping address.
    - Shipping method
    - Line items in the shipment

      > **Note:** Changes to an item's quantity can update applicable discounts in real-time.
  - Discounts applied. See also: Viewing and editing discounts.
- Order total
- Order meta-classes and fields that apply to the order, its shipments, and line items.

Contact Details tab

- Customer name and email address

You can update customer information from the **Cart Details** tab by clicking the edit icon next to **Customer Information**. See Viewing and updating customer information.

Editing carts

If you edit a cart's line items, its total is recalculated. Also, if the edits affect applicable discounts for the cart, the **Discounts** display changes.

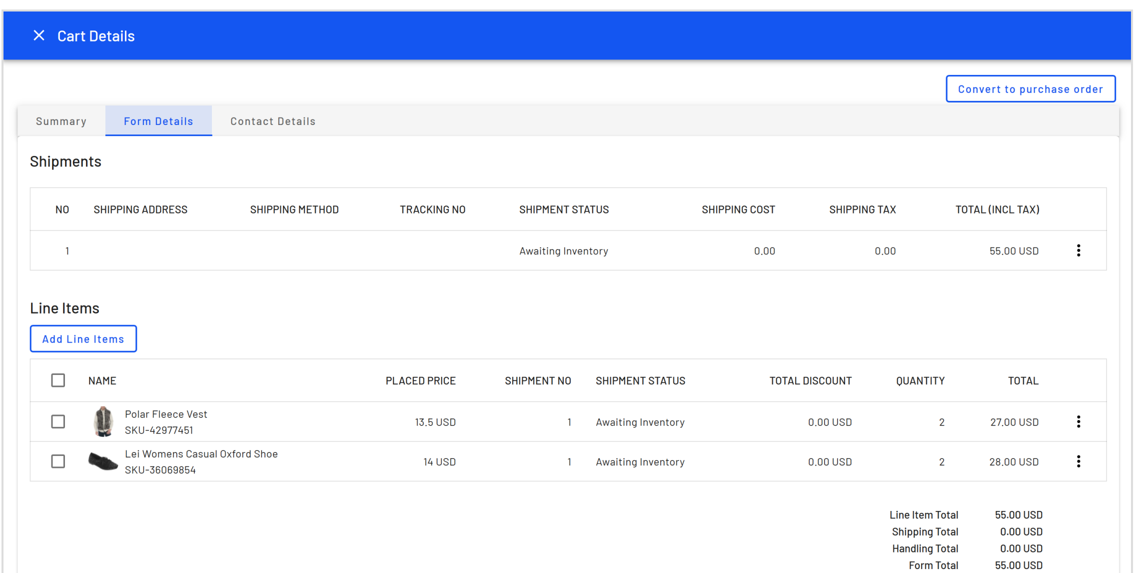
Updating market and currency

Near the top of the screen, you can change a cart's **Market** and **Currency**. Note that changing these values may affect other order information, for example, an item's price, available shipping methods, available promotions, and so on.

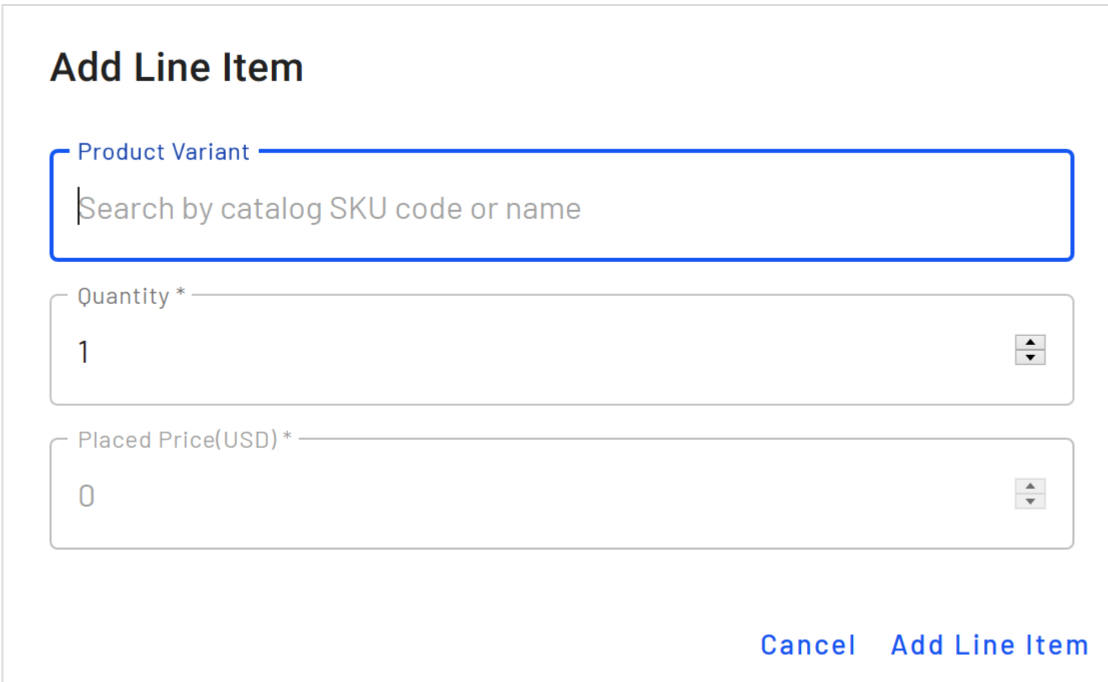
Adding a line item

To add a new line item:

1. Select the cart.
2. Click the **Form Details** tab.



3. Click **Add Line Items** on the left side of the screen.
4. A search window appears. Enter a search phrase of three or more characters. Examples:
   - The entire SKU (stock keeping unit), for example, **44477844**.
   - All or part of the item name or description, for example, **boot**.



5. Search results appear. Select the line item you want to add.

   If the item already exists in the cart, a cart icon with the previously-ordered quantity appears in search results.

   > Tip: To view detailed information of the line item, click **More Details**. The respective product page on your e-commerce website opens in a new tab.

6. Enter a quantity.

   If the item already existed in this cart, the new quantity is added to the existing quantity. A new line item is *not* created.

7. Click **Add Line Item**.

Changing a line item's quantity

To change a line item's quantity by a few nearby numbers (for example, from 2 to 4), use the up/down arrows next to the quantity.

To change quantity by a large amount (for example, from 2 to 50), it is quicker to select the quantity then type in a new one.

Deleting a line item

To delete a line item, click the item's context menu then **Delete**.

Selecting a shipping address

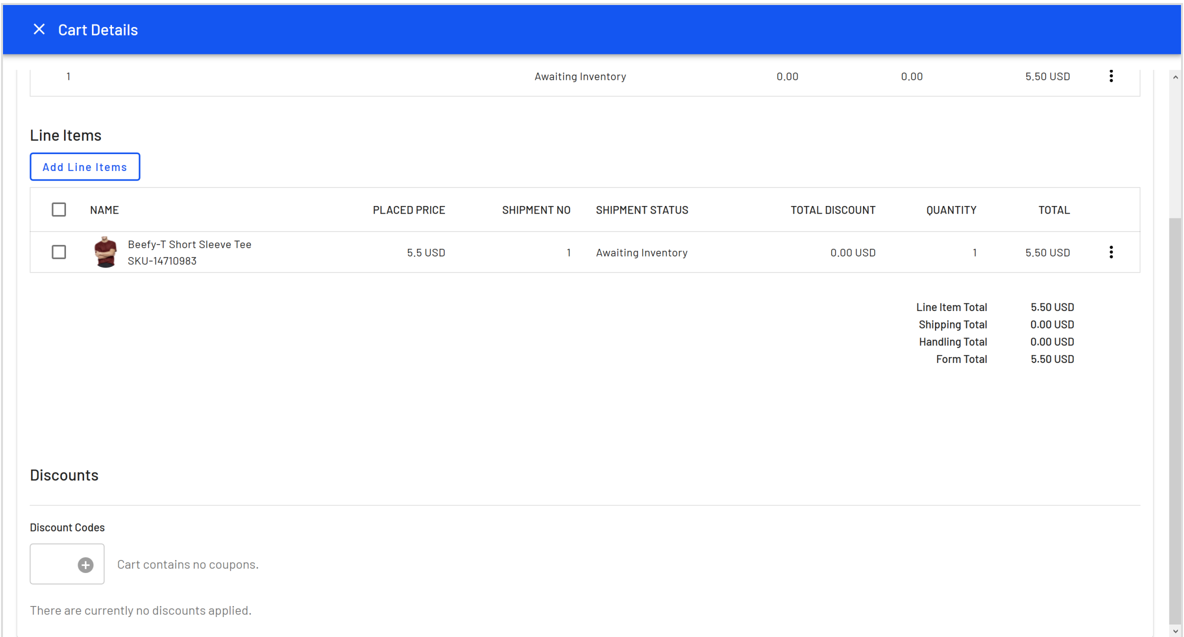
Every shipment needs a shipping address. On the **Cart Details** screen, it appears below the customer information and above the line items.

If a customer has several shipping addresses, use search to find the correct one. You can also enter a new shipping address.

Addresses are stored in and editable from the **Contact Details** screen's Address book tab.

Viewing and editing discounts

Discounts are applied to a cart or line items if their conditions are met. For example, a discount stipulates a $10 reduction for a cart whose total that exceeds $100. As soon as that is true, the $10 discount appears under **Discounts**, and the cart total is adjusted.



Discount codes

A discount code is an additional criterion that you can apply to any discount. For example, customers who enter discount code **CouponABC** during checkout receive 10% off the cart total.

A cart's submitted discount codes appear above the discount list. You can also manually add discount codes to a cart. If a code that you enter satisfies an item's or order's business logic, the discount amount is deducted from the cart total.

For example, men's shoes are 20% off *if* the customer enters the discount code **Shoes** when submitting the order. If a customer places a pair of men's shoes in a cart then enters coupon code **Shoes**, 20% is deducted and displayed in the **Discounts** area.

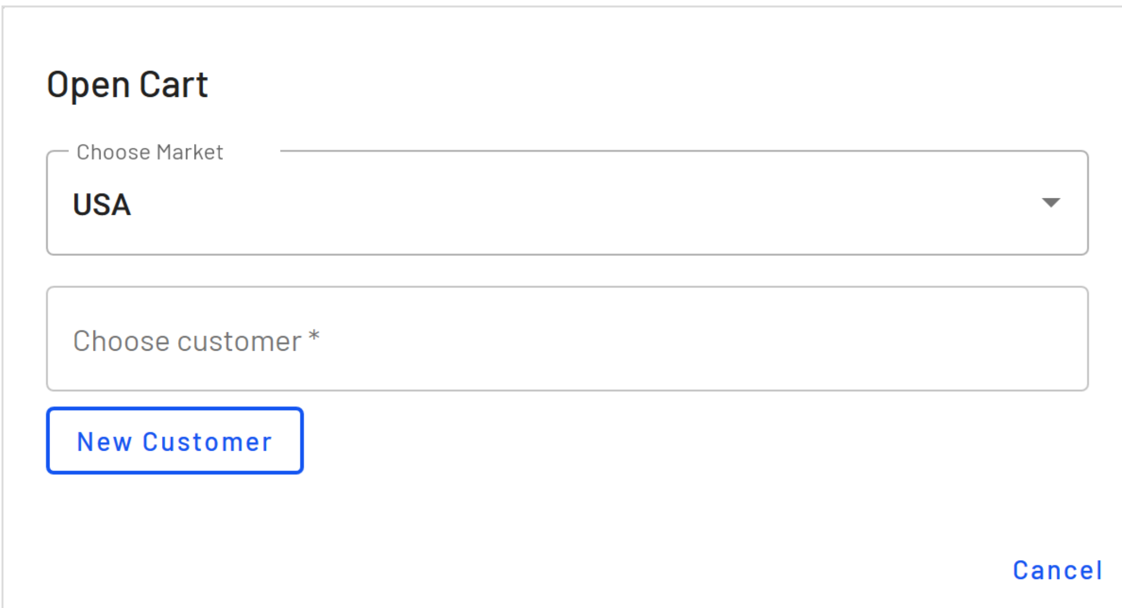
Creating discount codes for customer appreciation

You can create a discount that allows customer service representatives to apply refunds to customer carts for loyalty, compensation for problems, and so on. To do this, create a discount for this purpose, enter a discount amount, and a coupon code. Then, train your CSRs(customer service representatives) to use the code where appropriate to reduce the customer's cart total.

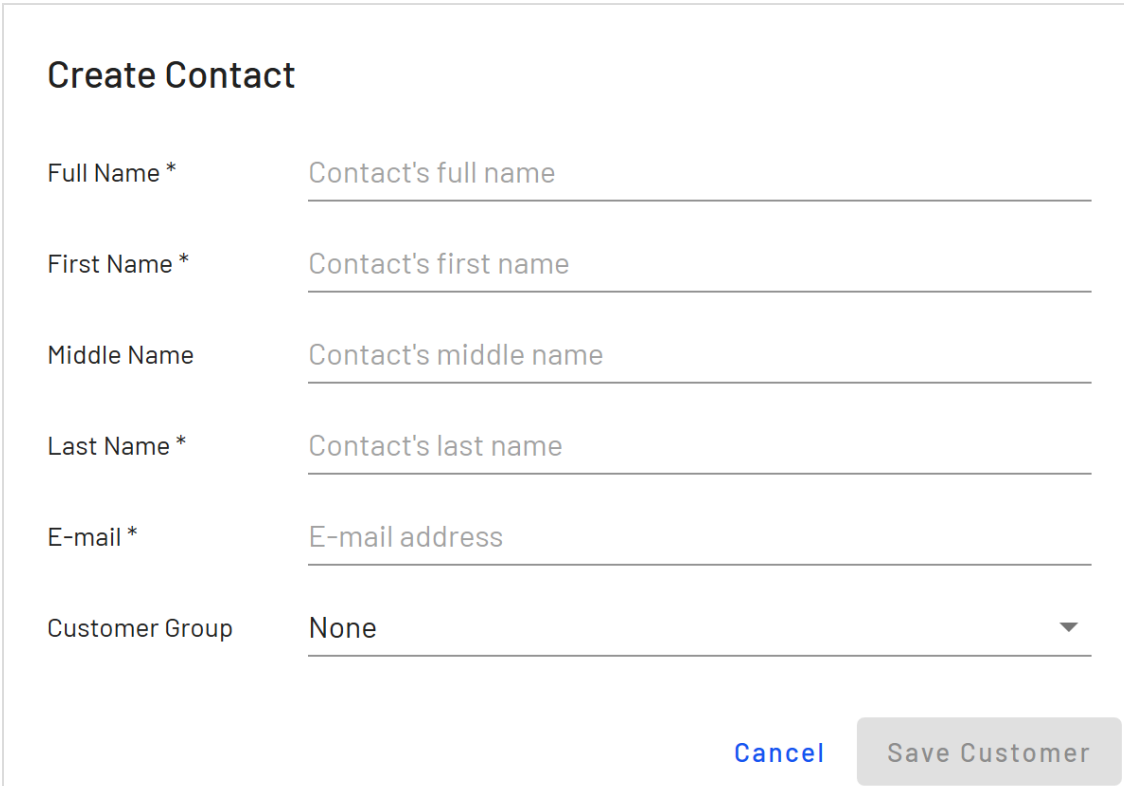
Adding a new customer and cart

You can create a new customer and his or her cart from the **Order Management** screen. Note that if a customer already has a cart for a market, you cannot create another cart for that market.

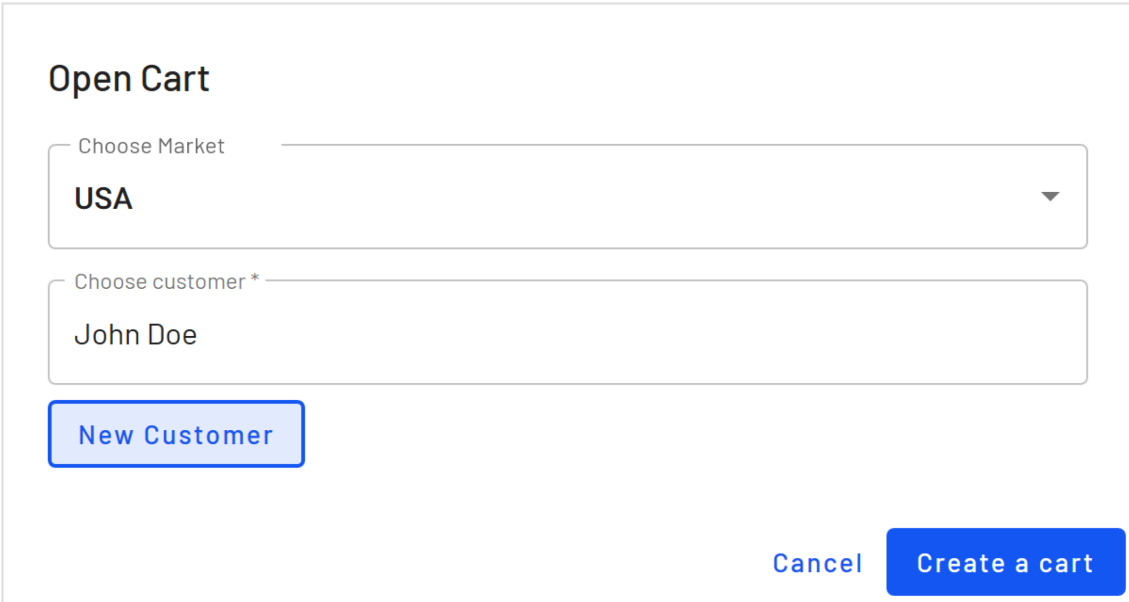
1. Click **Open cart**. The **Open cart** dialog box appears.
2. Select a market for the cart.
3. Click **New Customer**.



4. Enter the name, email, and Customer Group information and click **Save Customer**.



5. Click **Create a cart**.



6. The **Cart Details** screen appears. To learn about working with the cart, see Viewing a cart and Editing carts.

See also: Converting a cart to a purchase order

Working with purchase orders

This topic describes how to work with purchase orders on the Order Management screen.

Once a customer checks out and submits payment, a cart is converted to a purchase order. Alternatively, on the **Cart Details** screen, CSRs (customer service representatives) can convert a cart to a purchase order whether or not payments have been made.

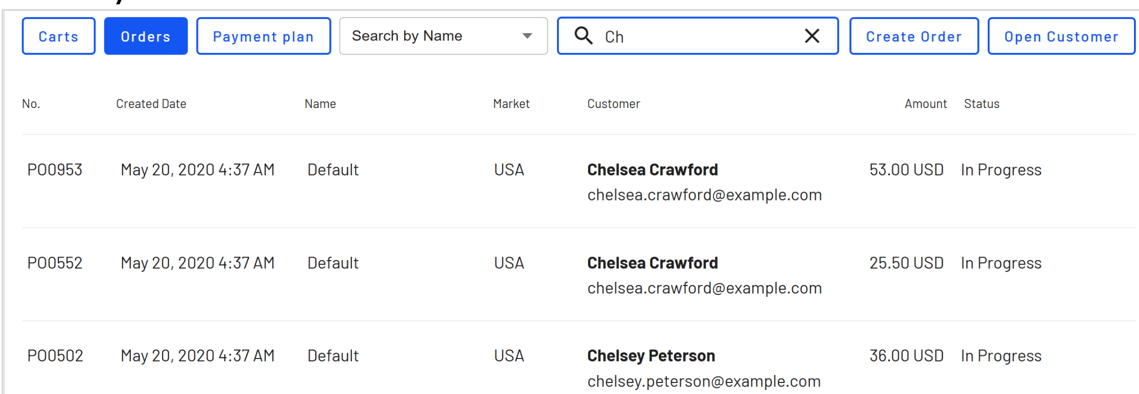
Alternatively, you can create a new purchase order.

While the purchase order's status is **In Progress**, you can edit any of its information (shipping address or method, line items, discounts, and so) on by clicking the **Form Details** tab.

Searching for purchase orders

You can search for purchase orders by customer name (partial match), order number (exact match), or email address (exact match).

1. In the top left corner of the Order Management screen, click **Orders**.
2. In the **Search by** drop-down, select **Search by Name**, **Search by Order Number**, or **Search by Email**.



   - If you chose **Search by Name**, move to the **Search** box and begin entering the customer's first name. For example, if the customer name is *Bryan Stephens*, enter *B*, *Br*, or *Bry*. Press **Enter** to execute the search.
     - You can enter the entire name, but this takes longer.
     - As you enter more characters, you get fewer search results.
     - You cannot find a customer by entering the last name. To continue the example, you cannot find Bryan Stephens by entering *Ste*.
   - If you chose **Search by Order Number**, enter the complete purchase order number. Partial entries are not allowed.
   - If you chose **Search by Email**, enter the exact email address. Partial entries are not allowed.
3. Orders that match your search criteria appear.

Converting a cart to a purchase order

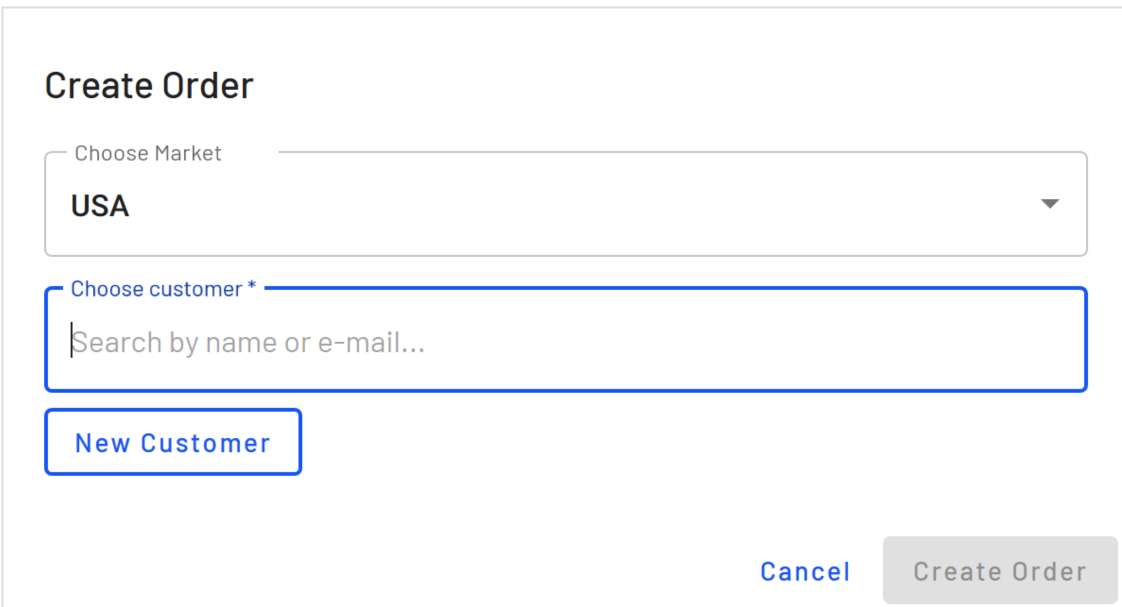
Typically, a shopping cart is converted to a purchase order when a customer proceeds to checkout and finalizes the purchase. However, you may need to manually complete a purchase by converting a shopping cart into an order for further processing. For example, you want to record manual payments towards outstanding balances, such as telephone payments.

Use the **Cart Details** screen to convert a cart to a purchase order.

Creating an order

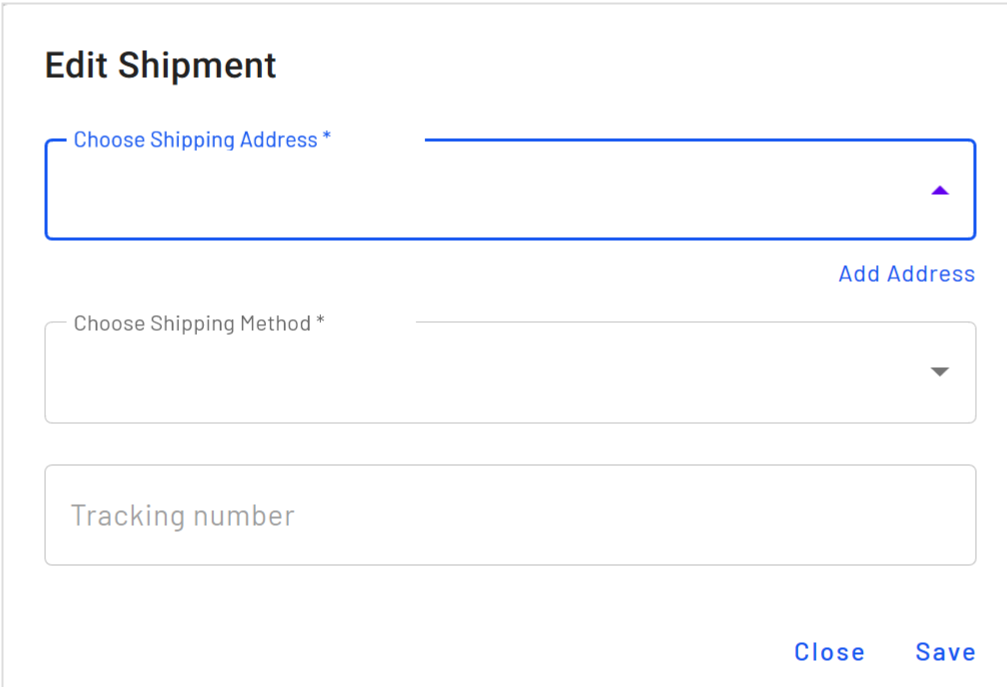
For example, a customer calls on the phone and orders some items. To create a new purchase order in Episerver Commerce, do the following:

1. From the **Order Management** screen, click **Orders** > **Create Order**.
2. Choose the order's market.



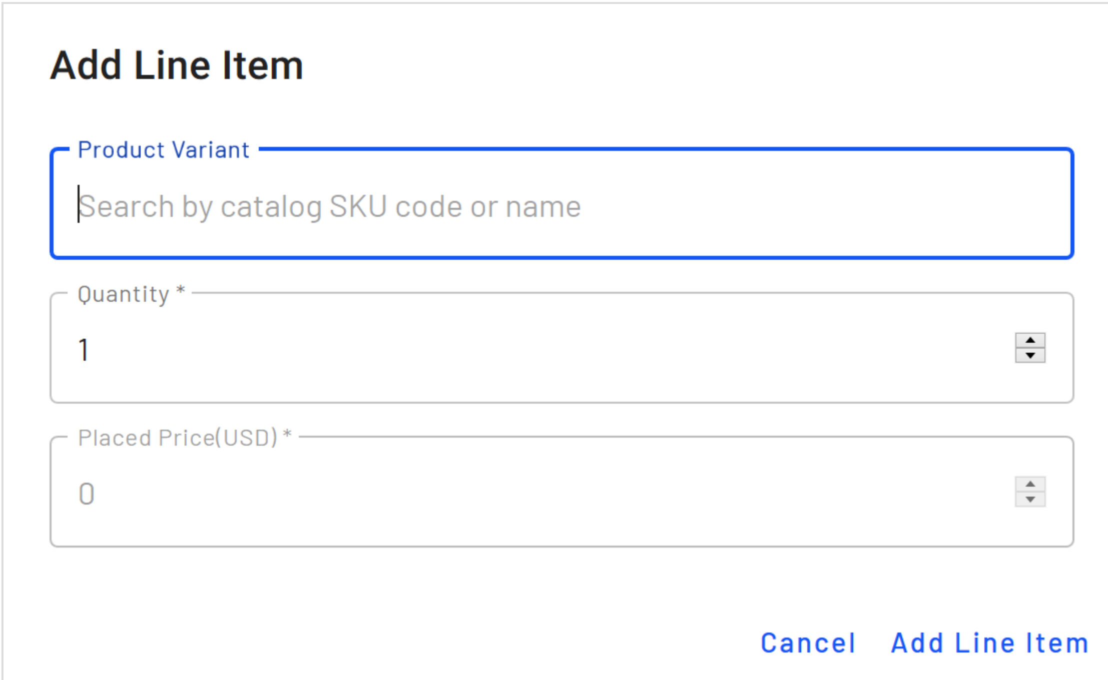
3. Choose an existing customer or create a new one.
   - To find an *existing* customer, enter any part of the customer name or email address. A list of matching customer names appears. Select the customer.
   - To enter a *new* customer, click **New Customer**. The **Create Contact** dialog appears. Enter the customer's name, email address, and customer group.
4. Click **Create Order**.
5. Click the context menu to the right of shipment 1 and click **Edit**.

6. Enter the order's shipping address and shipping method.



> **Tip:** If you want to add a separate shipping address to this order, see Adding a new shipping address to an order.

7. Click **Save**.
8. Click **Add line items**.
9. In the **Product Variant** field, enter a search phrase of three or more characters. Examples:
   - The entire SKU (stock keeping unit), for example, *44477844*.
   - All or part of the item name or description, for example, *boot*.



10. Search results appear. Select the line item you want to add.

    Tip: To view detailed information of the line item, click **More Details**. The respective product page on your e-commerce website opens in a new tab.

11. Choose a quantity and price. The default placed price appears, but you can change it.
12. Click **Add Line Item**.
13. After adding at least one item, click **Create Order**.

Although the order is created, it must be paid before it can be released, as explained in Shipment, order and return statuses. See also: Recording purchase order payments.

Recording purchase order payments

1. From the **Order Management** screen, click **Orders**.
2. Select the order you want to edit.
3. If needed, edit the previously-collected information. See Editing carts.
4. Click the **Form Details** tab.

5. If the full amount has not yet been paid, click **Accept Payment** to add or update payment information.
   - Billing address
   - Payment method
     - Transaction ID and amount
     - Any meta-classes and fields that apply to the order, its shipments, and line items.

Placing an order on hold

When a shopping cart is converted to a purchase order, its status is set to **In Progress**. You may need to place the order on hold for several reasons. As examples: the retailer needs to verify the order, a suspicious order needs attention, inventory is not available, and so on.

To place an order on hold, click **Order Management** and select the order. Then, on the **Order Details** screen, click **Hold**.

While an order is on hold, it cannot be released for shipment nor can it be canceled.

Canceling an order

To cancel an **In Progress** purchase order, click **Order Management** and select the order. Then, on the **Order Details** screen, click **Cancel Order**.

At that point, its order and shipment statuses change to **Canceled**.

Deleting an order

At this time, you can only delete an order through Commerce Manager. See Deleting an order.

Adjusting an order's shipment status

> Note: For information about order status versus shipment status, see Shipment, order and return statuses.

1. When an order is paid in full
   - If the quantity of any item in an order exceeds the available Instock Quantity, its shipment status is set to **Awaiting Inventory**.

     > Note: If you want to support preorders, their shipment status will be set to **Awaiting Inventory**.

   - If the quantity of all items in an order is less than the available Instock Quantity, its shipment status is set to **Inventory Assigned**.
2. When an order is paid and ready for shipping, click the **Form Details** tab and select **Release** from the context menu.
3. To prepare an order for shipping, change the shipment status to **Packing** by clicking **ADD TO PICKLIST**.
4. When the shipment is shipped, change the shipment status to **Shipped** by clicking **COMPLETE**.

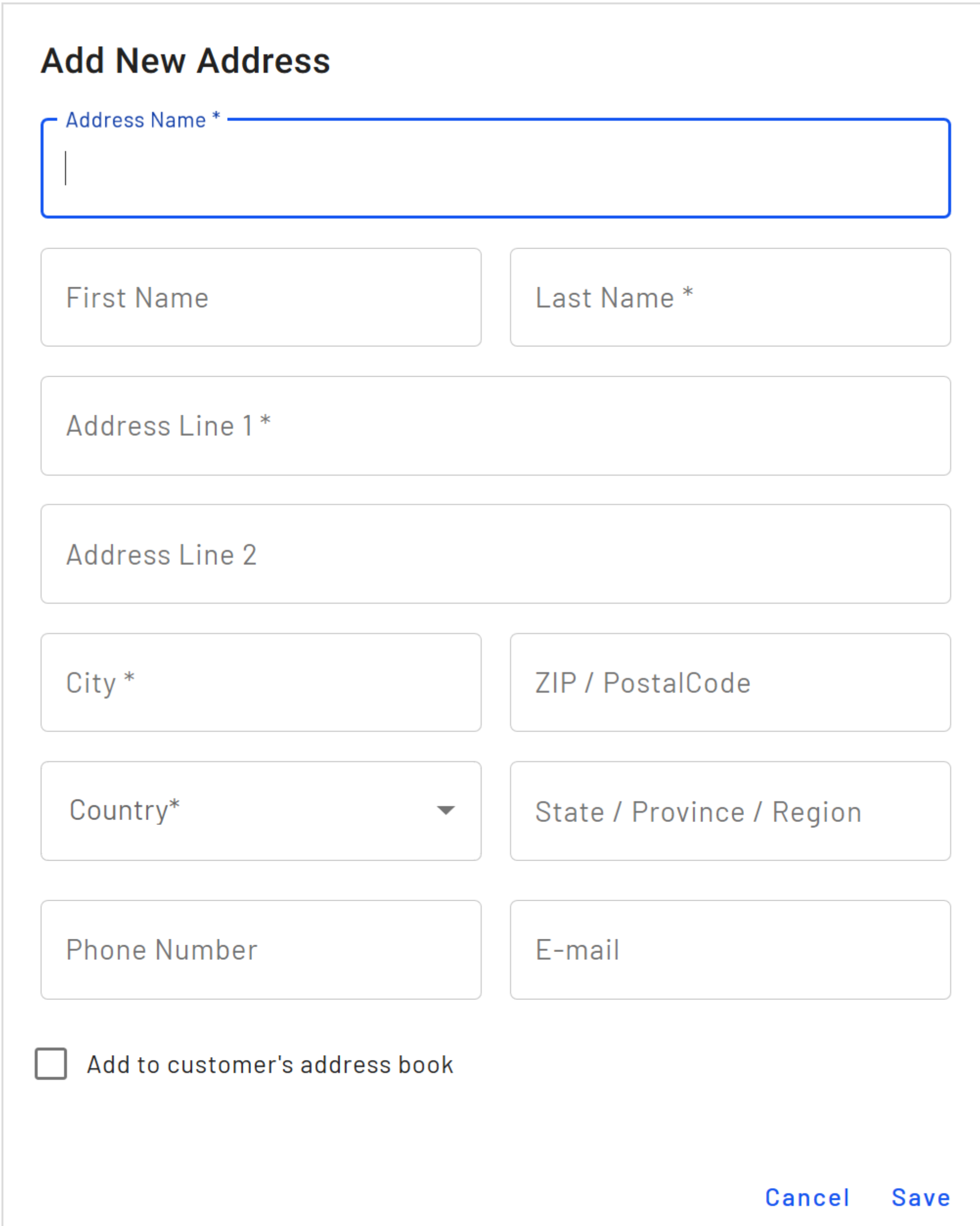
> Note: At this time, you must use Commerce Manager to complete the following shipping tasks:
>
> - Create picklist and print picklist and packing slip
> - Remove items from picklist
> - Delete a picklist
> - View shipments
> - Split a shipment
> - Complete a shipment, that is, record shipment information such as tracking number

Adding a new shipping address to an order

To add a new shipping address to an order without editing an existing address or adding a new address to the customer's address book, do the following:

1. From the **Order Management** screen, click **Orders** and select an order. The **Order Details** screen appears.
2. Open the **Form Details** tab.
3. Click the context menu to the right of shipment 1 and click **Edit**.
4. Click **Add Address**.

5. Enter the address information.



6. If you want to add the new shipping address to the customer's address book to use it for further orders, select the **Add to customer's address book** check box.
7. Click **Save** > **Close**.

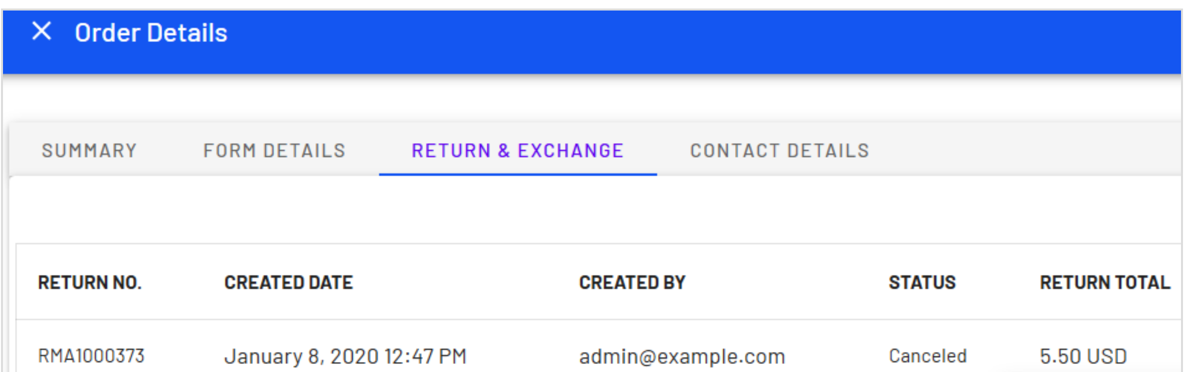
> **Tip:** Changing the customer address does not affect the order's shipping address.

Working with order returns and exchanges

This topic describes how to view, process and cancel order returns on the Order Management screen, and how to process exchange orders.

Viewing order returns

On the Order Management screen, you can view returns by clicking **Orders** > choosing a *Completed* purchase order > **Return & Exchange**. Any returns that have been made against the order appear. Click any return then **View** on the context menu to see its details.

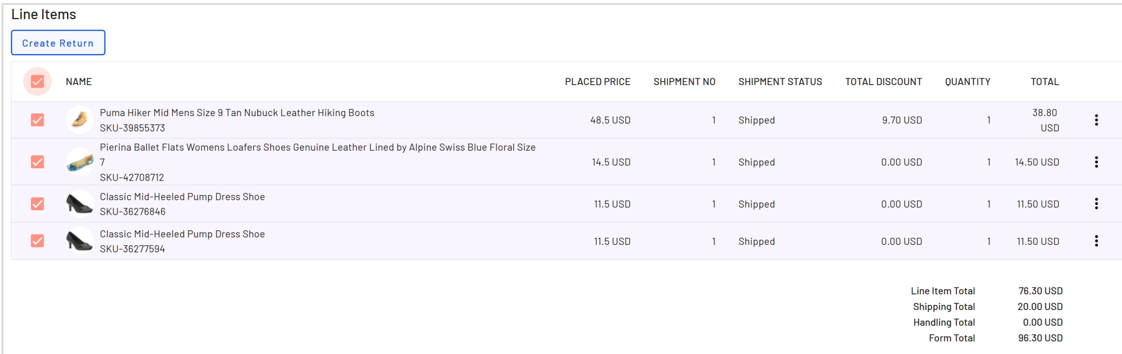


Processing an order return and refund

Prerequisite: The item's shipment status is **shipped**.

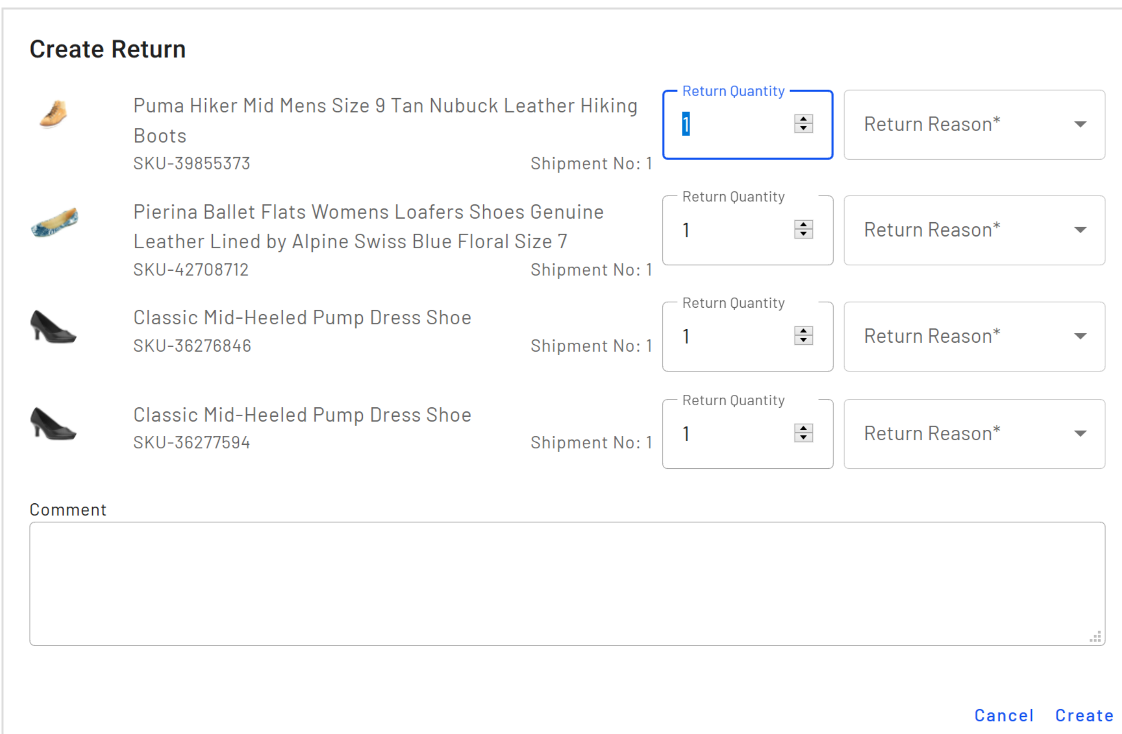
Follow these steps to return one or more order items.

1. From the Order Management screen, select **Orders**.
2. Select the order whose items you want to return.
3. Click the **Form Details** tab.
4. Click in the box to the left of the item(s) you want to return. To return all items, click the box in the column header row.



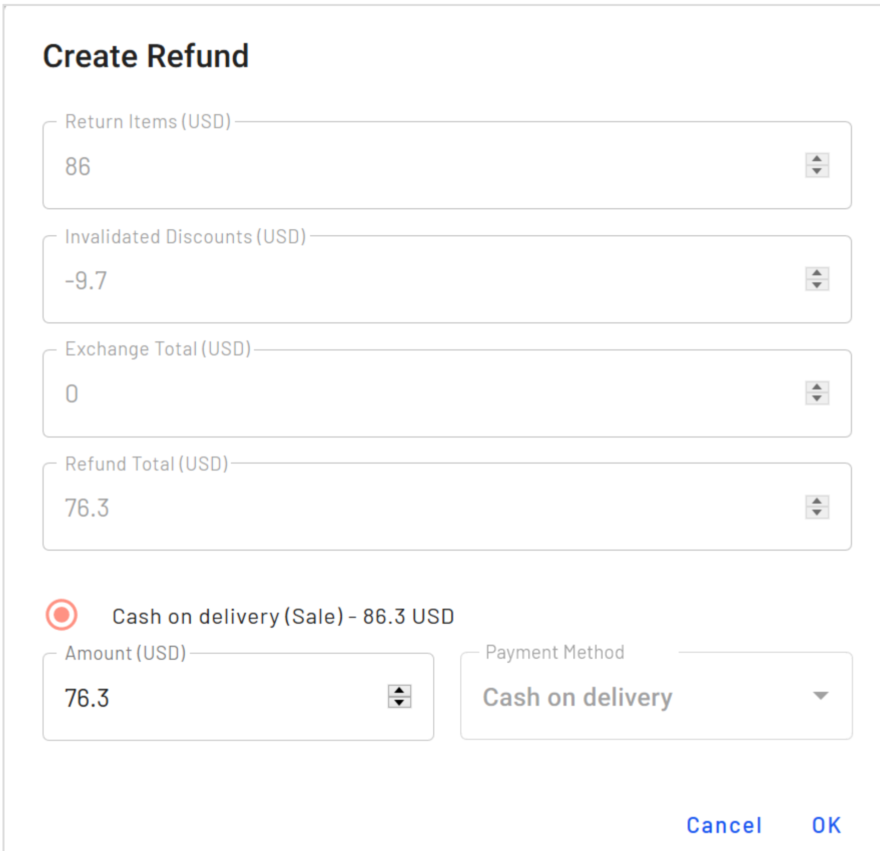
> Note: You can also click the item's context menu then **Create Return**.

5. Click **Create Return**. A window appears, prompting you to choose a **Return Quantity**, Return Reason, and optional text comment for each item.



6. Click **Create**.
7. A new screen appears with the return information. If everything is correct, click **Acknowledge Receipt Items**.

8. Click **Complete Return**. The Create Refund screen appears.
9. Verify that the refund amount is correct, select a payment method and click **OK**. If necessary, you can adjust the refund amount but it cannot exceed the original charge.



Canceling an order return

1. From the Order Management screen, select **Orders**.
2. Select the order whose returned items you want to cancel.
3. Click the **Return & Exchange** tab.
4. Select the order whose return you want to cancel. To view the items being returned, open the context menu and choose **View**.
5. Click **Cancel Return**.

Processing an exchange order

You can create an exchange order if a customer wants to receive the same item or a different item as full or partial compensation for a return. For example, a customer returns a jacket worth $50 because it has a broken zipper. He wants to exchange it for another version of the same jacket.

As another example, a customer returns a jacket worth $50. He wants to exchange it for a shirt worth $25 and a refund of $25.

- If the amount of the exchanged items is *less than* the original order, the customer receives a refund using the original order's payment method.
- If the amount of the exchanged items is *greater than* the original order, the customer is charged the additional amount using the original order's payment method.

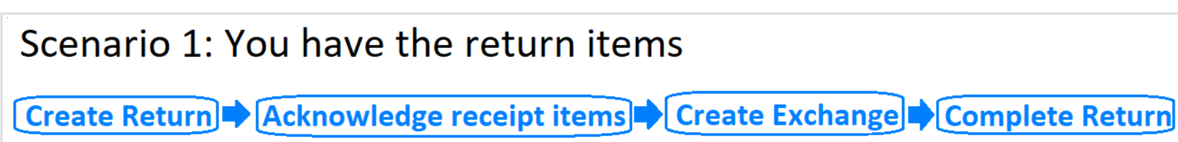
The Order Management screen calculates the refund amount (if any). If the CSR changes the refund amount, a warning appears but the CSR is allowed to complete the transaction.

Creating an exchange order

You can create an exchange order at any time. Initially, its status is **Awaiting Exchange**. When you complete the return, the order's status changes to **In Progress**.

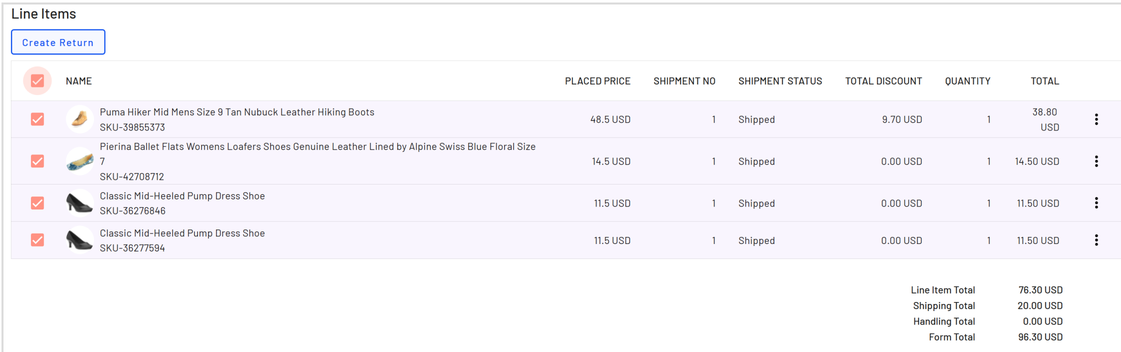
There are two procedures for creating an exchange order. Use Scenario 1 if you have already received the returned items. Use the Scenario 2 if you have not yet received the returns.

Creating an exchange order if you received the returned items



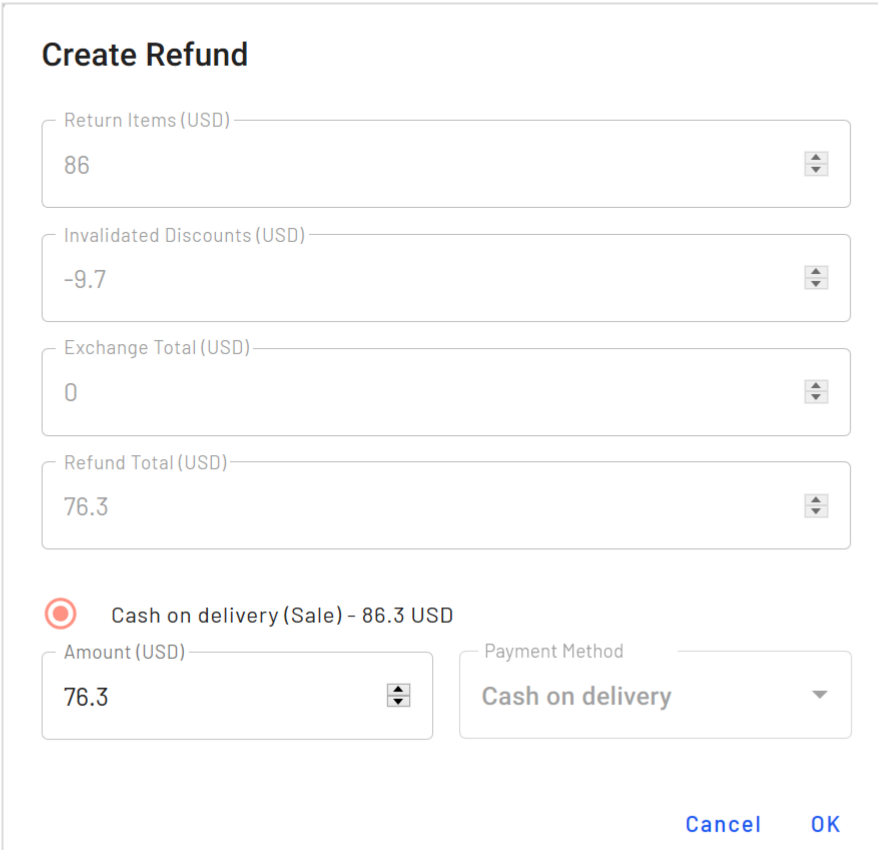
1. Select a *Completed* order and click the **Form Details** tab.
2. Under **Line Items,** select items that you want to exchange.

3. Click **Create Return**.



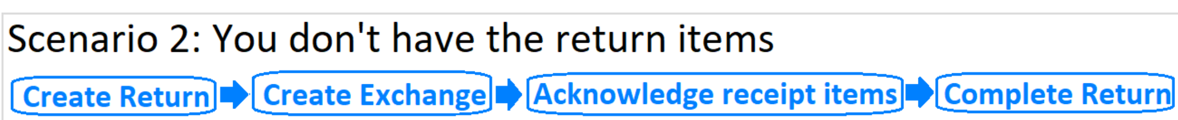
4. Select the **Return Quantity** if necessary.
5. Submit a Return Reason and an optional comment.
6. Click **Create**.
7. Click **Acknowledge Receipt Items**.
8. Click **Create Exchange**. The Prepare Order screen appears.
9. Under **Shipments**, select the shipment and choose **Edit** from the context menu.
10. Enter the customer's shipping address and shipping method then click **Save**.
11. Click **Add Line Items.**
12. Add the items, quantity, and price that the customer will receive as an exchange for the returned items.
13. Click **Add Line Item**.
14. Click **Create Order**. An exchange order is created. Its number begins with an **EO**.
15. Click **Go to original order**.
16. Click the **Return & Exchange** tab.
17. Select the return order and click **View** on the context menu.
18. Click **Complete Return**.

19. If necessary, modify the refund amount.



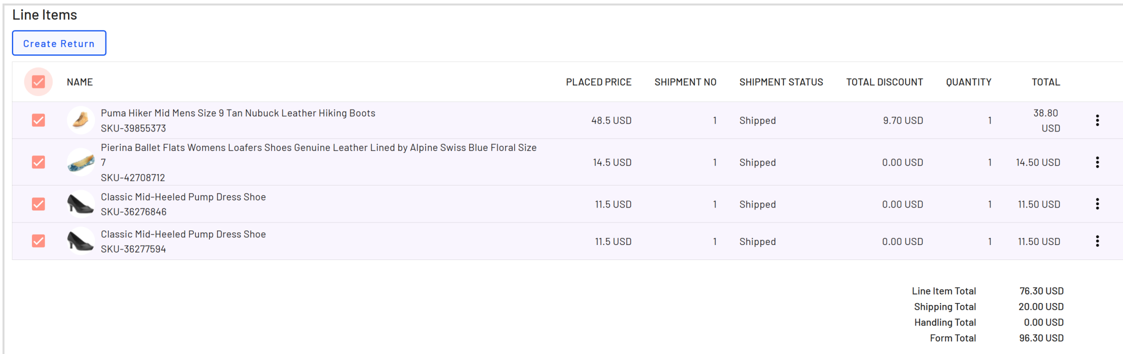
20. Click **OK**.

Creating an exchange order if you have not yet received the returned items



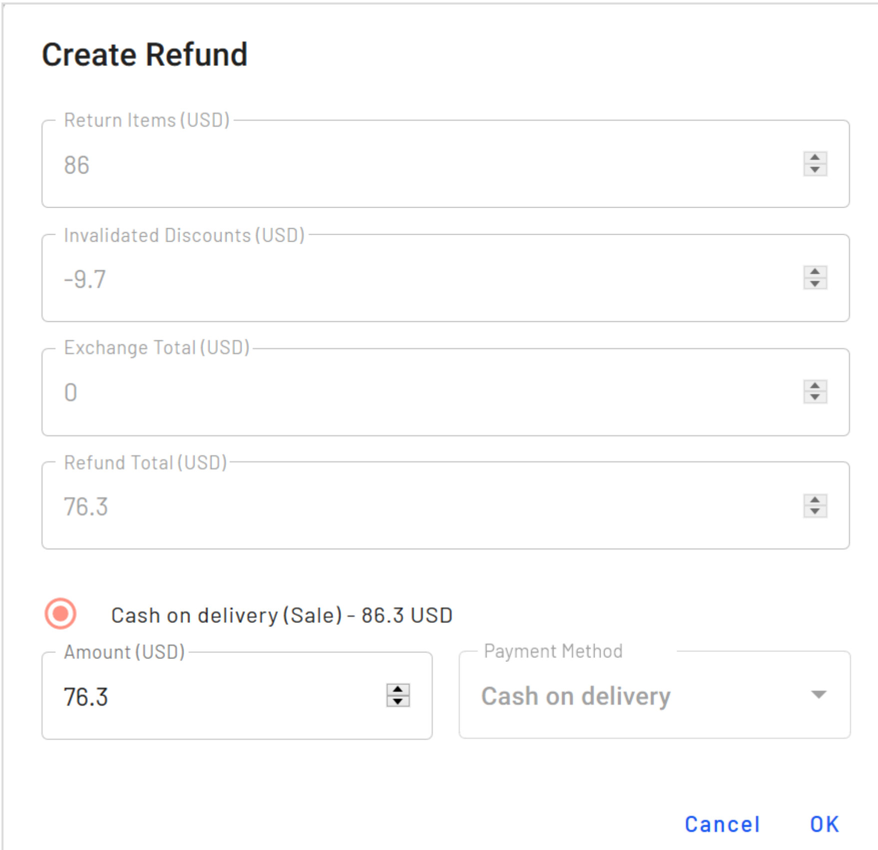
1. Select a *Completed* order and click the **Form Details** tab.
2. Under **Line Items**, select items that you want to exchange.

3. Click **Create Return**.



4. Select the **Return Quantity** if necessary.
5. Submit a Return Reason and an optional comment.
6. Click **Create**. The Return Details screen appears.
7. Click **Create Exchange**.
8. On the **Prepare Order** screen, under **Shipments**, select the shipment and choose **Edit** from the context menu.
9. Enter the customer's shipping address and shipping method then click **Save**.
10. Click **Add Line Items.**
11. Add the items, quantity, and price that the customer will receive as an exchange for the returned items.
12. Click **Add Line Item**.
13. Click **Create Order**. An exchange order is created. Its number begins with an **EO**.
14. When you receive the returned items, open the original order.
15. Click the **Return & Exchange** tab.
16. Select the return order.
17. Click **Acknowledge Receipt Items**.
18. On the **Order Details** screen, select the return order and click **View** from the context menu.
19. Click **Complete Return**.

20. If necessary, modify the refund amount.



21. Click **OK**.

Viewing an exchange order

1. From the Order management screen, click **Orders** and select the original order.
2. Click the **Return & Exchange** tab.
3. Select the returned item.
4. From the context menu, click **View**.
5. Click **View Exchange**.

   On the **Summary** tab, in the top left, the exchange order number appears in the **Order Number** field.

Viewing an exchange order's parent order

1. From the Order Management screen, click **Orders** and select the exchange order. The **Order Details** screen appears.
2. From the top right, click **Go to original order**.

Working with payment plans

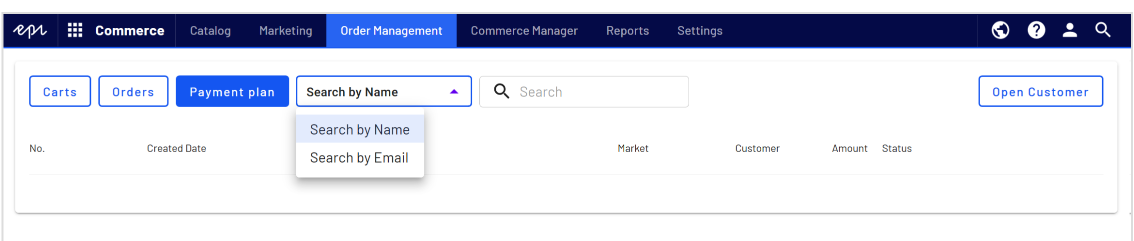
This topic describes how to work with payment plans on the Order Management screen.

A payment plan works exactly like processing an order, except that a payment plan spreads payments over time, giving you flexibility in how you sell your products, and how a customer pays for them. Use a payment plan for large and complicated orders, orders that need to be shipped in sequence, magazine or grocery subscriptions, or expensive items.

A Customer Service Representative (CSR) sets up a payment plan to generate recurring payments. Payment plans are handled in the background through the Subscription payment plan scheduled job.

Viewing payment plans

1. From the Order Management screen, click **Payment plan**. All payment plans appear.
2. To narrow down the list, identify the payment plan's customer by selecting **Search by Name** or **Search by Email**.



- If you chose **Search by Name**, move to the **Search** box and begin entering the customer's first name. For example, if the customer name is *Bryan Stephens*, enter *B*, *Br*, or *Bry*. Press **Enter** to execute the search.

        - You can enter the entire name, but this takes longer.
        - As you enter more characters, you get fewer search results.
        - You cannot find a customer by entering the last name. To continue the example, you cannot find Bryan Stephens by entering *Ste*.

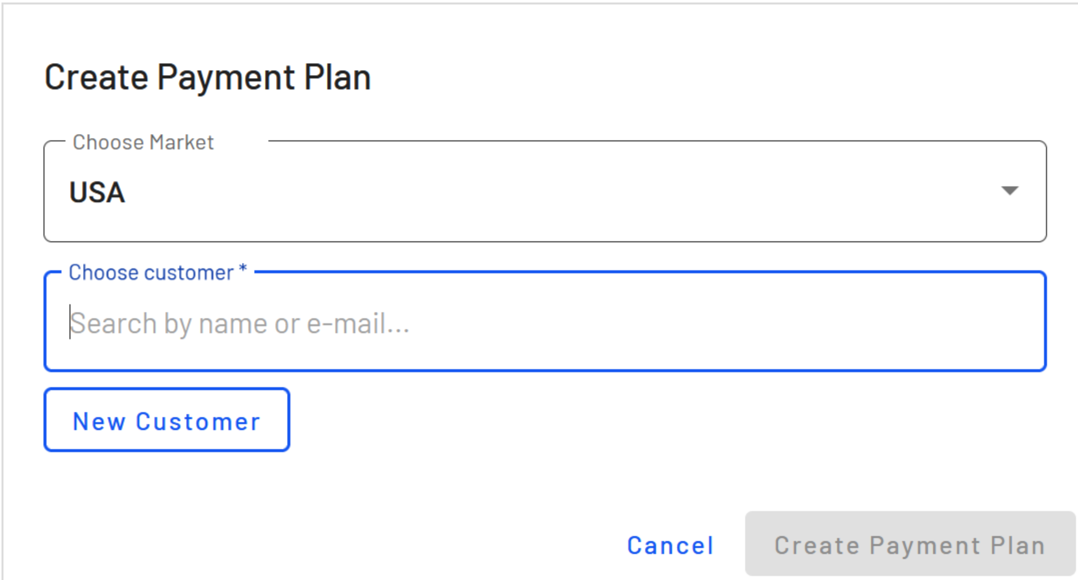
    - If you chose **Search by Email**, enter the exact email address. Partial entries are not allowed.

3. Choose the payment plan that you want to view. The information is displayed in the following tabs:
    - **Summary**. General information, such as market and currency, order number, created date, items, shipping, and discount information.
    - **Form Details**. Shipping address and method, line items, discounts, and payments.
    - **Contact Details**. Customer name and email address. You can view and edit customer information by clicking the edit icon next to **Customer Information**. See Viewing and updating customer information.
    - **Settings**. Information about the payment plan, such as cycle length and start date.

Creating a payment plan

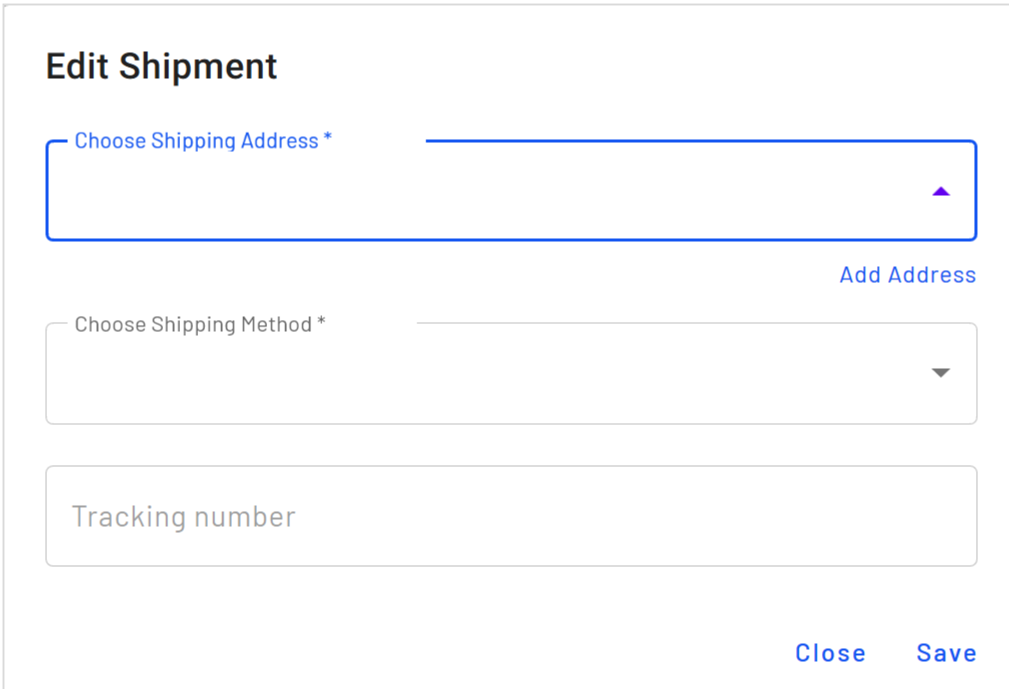
1. From the Order Management screen, click **Payment plan**.
2. Click **Create Payment Plan**.

3. Choose the payment plan's market.

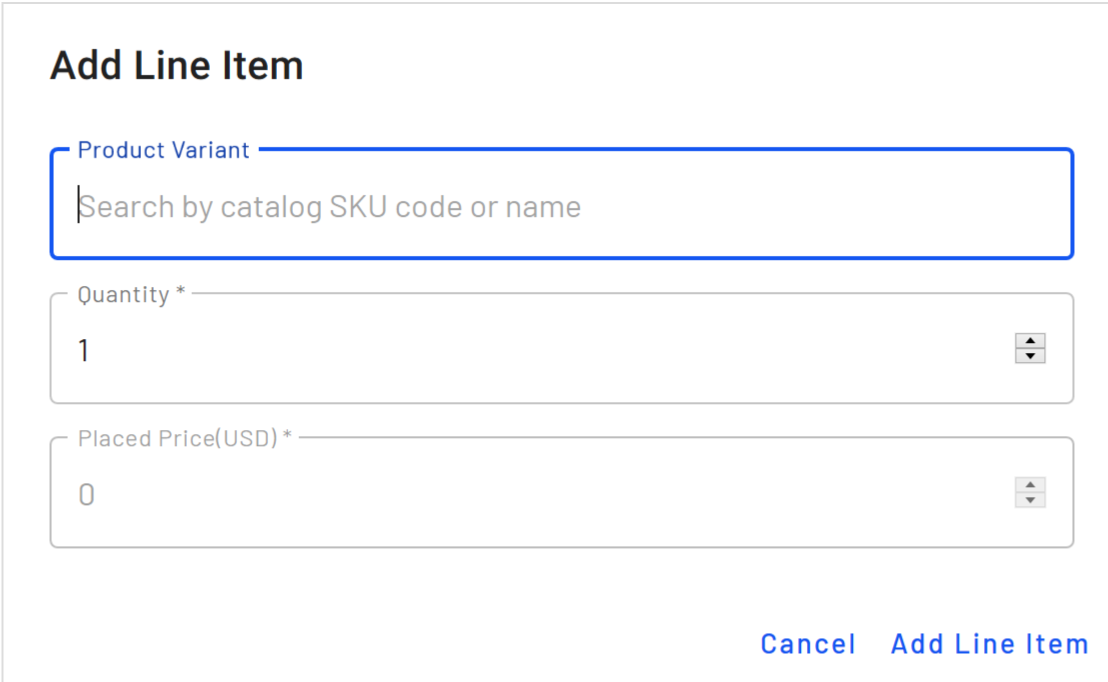


4. Choose an existing customer or create a new one.
   - To find an *existing* customer, enter any part of the customer name or email address. A list of matching customer names appears. Select the customer.
   - To enter a *new* customer, click **New Customer**. The **Create Contact** dialog appears. Enter the customer's name, email address, and customer group.
5. Click **Create Payment Plan**.
6. Click the context menu to the right of shipment 1 and click **Edit**.

7. Enter the payment plan's shipping address and shipping method.



8. Click **Save**.
9. Click **Add Line Items**.
10. In the **Product Variant** field, enter a search phrase of three or more characters. Examples:
    - The entire SKU (stock keeping unit), for example, *44477844*.
    - All or part of the item name or description, for example, *boot*.

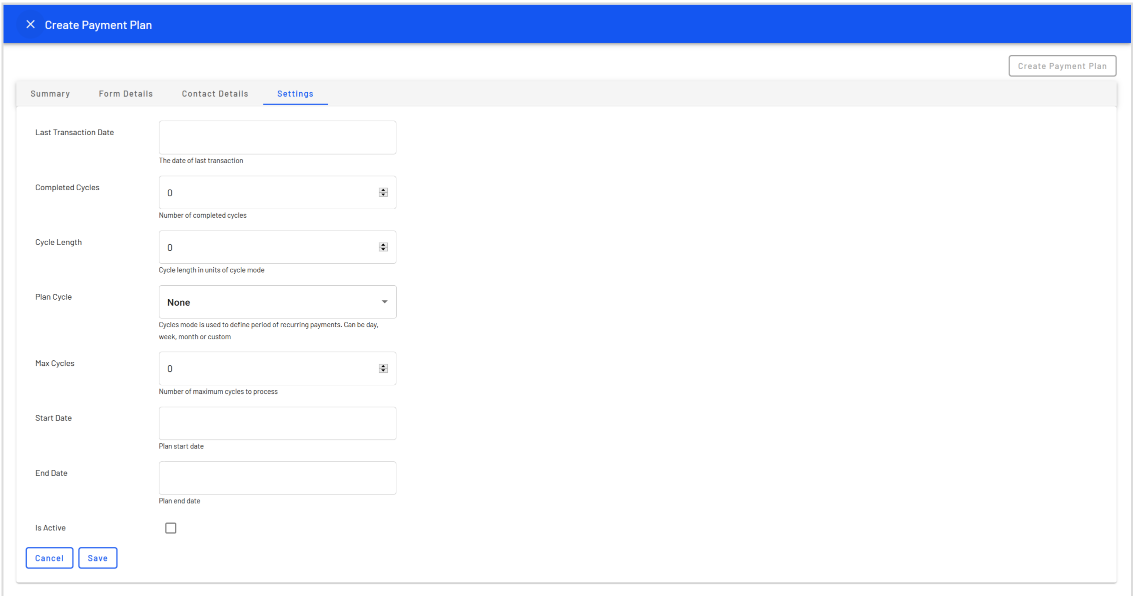


11. Search results appear. Select the line item you want to add.

    > Tip: To view detailed information of the line item, click **More Details**. The respective product page on your e-commerce website opens in a new tab.

12. Choose a quantity and price. The default placed price appears, but you can change it.
13. Click **Add Line Item**.

14. Open the **Settings** tab and set the cycles and parameters of the payment plan.



- **Last Transaction Date**. Logs the last transaction date. Leave the date and time fields as is when you create the payment plan.
- **Completed Cycles**. This tallies the number of completed cycles since the payment plan was created. When initially creating the payment plan, set this field to **0**.
- **Cycle Length**. Entering a value of 1 or higher determines the unit of time for the Plan Cycle. For example, if the Plan Cycle is **Daily**, and the **Cycle Length** is **3**, a transaction occurs every three days. If the Plan Cycle is **Monthly** and the **Cycle Length** is **1**, a transaction occurs each month.
- **Plan Cycle**. (Cycle Mode)

  You can choose from the following plan cycles, which determine how often the customer is charged.

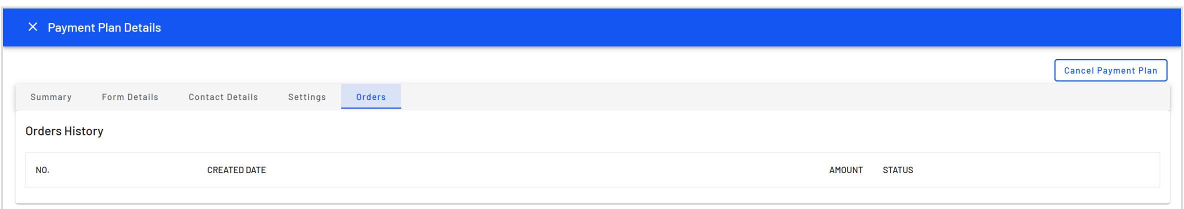
  - **None**. No recurring payment is created. The customer is charged once when the initial purchase order is created.
  - **Days**. Recurring payment happens daily from start date.
  - **Weeks**. Recurring payment happens weekly from start date.
  - **Months**. Recurring payment happens monthly from start date.
  - **Years**. Recurring payment happens annually from start date
  - **Custom1/Custom2**. These are placeholders for developers to create custom cycles within the **Mediachase.Commerce.Orders.PaymentPlanCycle** class.

- **Max Cycles**. Determines the maximum number of cycles to run for this payment plan. For example, if the **Max Cycles** is set to **2**, payment plan stops after two transaction cycles. If you want the plan to go on indefinitely, set **Max Cycles** to **0**.
- **Start Date**. Set the start date and time when recurring transactions begin.
- **End Date**. Set the end date and time when recurring transactions end.
- **Is Active**. To enable the payment plan, enable the check box. To create the payment plan but keep it inactive, leave the check box clear.

15. Click **Create Payment Plan**.

Payment plan orders

After you create a new payment plan, the **Orders** tab appears on the **Payment Plan Details** screen. The **Orders History** shows all processed purchase orders from this payment plan.

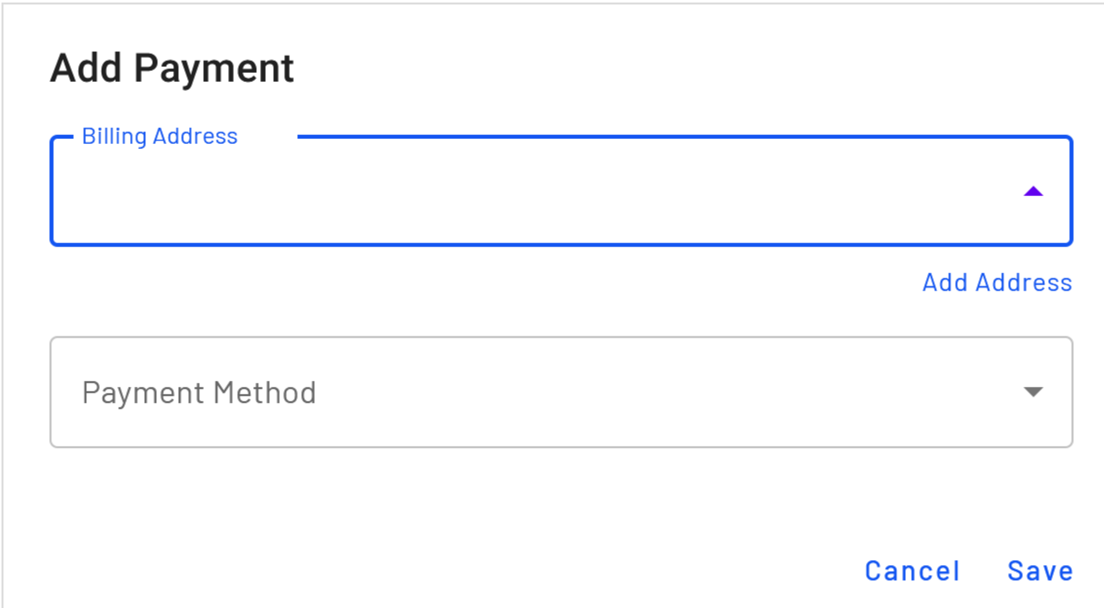


The payment plan begins when the first purchase order is generated. You can create the purchase order manually or automatically by the payment plan scheduled job.

Creating the first purchase order manually

1. From the Order Management screen, click **Payment plan**.
2. Choose the payment plan you want to create the first purchase order for.
3. On the **Payment Plan Details** screen, click the **Form Details** tab.
4. Click **Add Payment**.

5. Select a billing address and payment method.



6. Click **Save**.
7. Click **Create First Purchase Order**.

The **Create First Purchase Order** button disappears after creating the first purchase order manually, or if the payment plan scheduled job runs and generates the first purchase order.

The generated purchase order number includes the parent ID of the payment plan. For example, if the payment plan parent ID is 35, subsequent purchase orders are numbered as PO35XXX.

When a payment is added to a payment plan, the customer is not charged. The payment plan simply collects payment information until converted to a purchase order. The customer is charged once the purchase order is generated for the first time (and through subsequent purchase orders).

Editing a payment plan

1. From the Order Management screen, click **Payment plan**.
2. Click the payment plan you want to edit and make your changes. You can add and edit line items, change the payment plan settings and shipping information.

Canceling a payment plan

1. From the Order Management screen, click **Payment plan**.
2. Click the payment plan you want to cancel.
3. On the **Payment Plan Details** screen, click **Cancel Payment Plan**.

Converting a cart to a payment plan

Typically, a shopping cart is converted to a purchase order when a customer proceeds to checkout and finalizes the purchase. You can also convert a cart to a payment plan for further processing. For example, you want to generate recurring payments for the products added to the cart.

Use the **Cart Details** screen to convert a cart to a payment plan.

Commerce Manager (legacy)

Since the new Order Management screen is now available, this section contains documentation for the older Commerce Manager features. These features are being replaced. The Order Management screen will continue to undergo future development.

Shopping carts

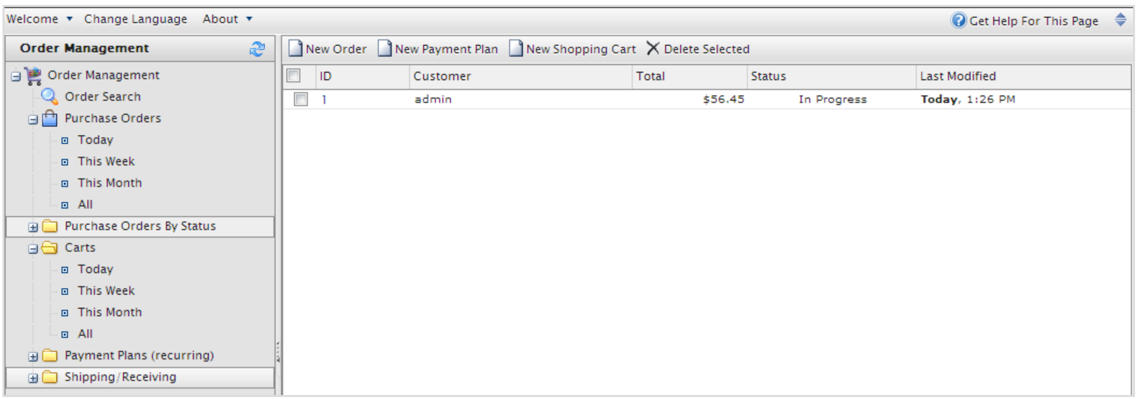
A visitor creates a shopping cart when the visitor clicks **Add to basket** option on any page. You can manually create and manage a shopping cart from **Order Management** > **Carts** where you can view registered and anonymous customer carts and manually convert a cart into a purchase order. See also: Shopping process flow.

Creating a shopping cart

Each shopping cart is unique and has its own ID. A customer can have only one cart open at a time. So, if the customer already has a cart open, the system redirects to the open cart.

When a cart's checkout is complete and payment is submitted, the cart is converted to an order. At that point, the cart disappears from the **Carts** list, and appears in the purchase order list.

1. Go to **Order Management** > **Carts**.
2. Click **New Shopping Cart**.

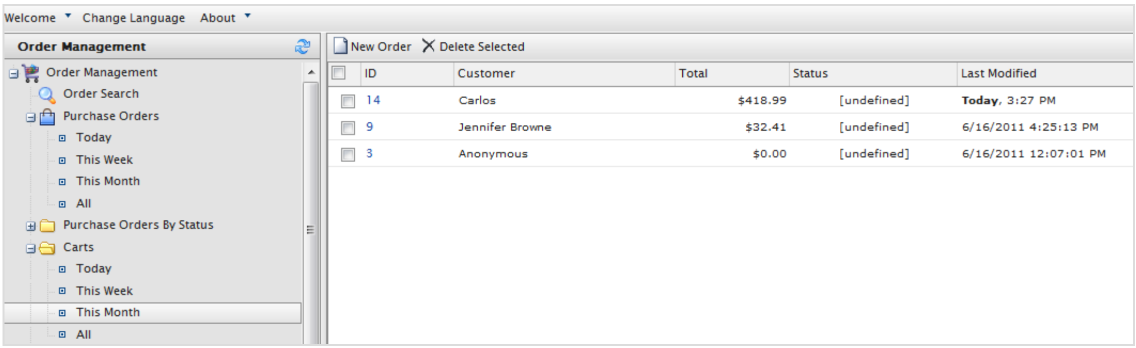


3. Select a customer for whom you want to create the cart. If you do not see the customer in the list, click **More** to search for them.
4. Enter product items to the cart by clicking **New Line Item.**
5. Return to the **Carts** view to verify that the cart is there.

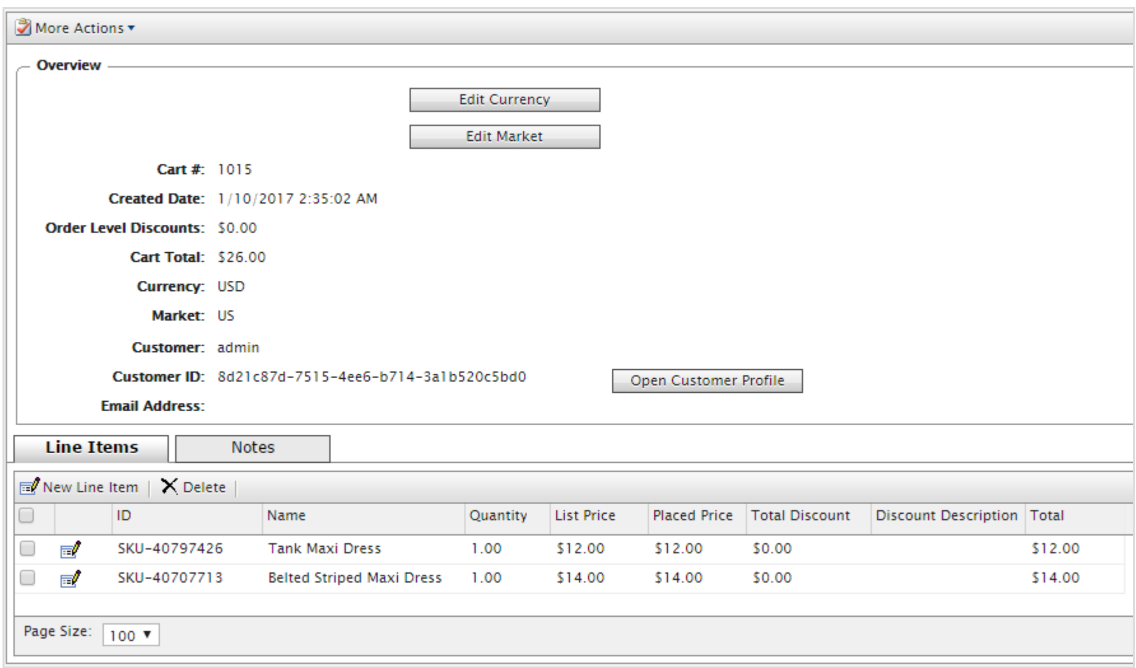
Converting a shopping cart

Typically, a shopping cart is converted to a purchase order when a customer proceeds to checkout and finalizes the purchase. However, you may need to manually complete a purchase by converting a shopping cart into an order for further processing.

1. Go to **Order Management** > **Carts**. You see the **Shopping Carts** list. You can also select **Today**, **This Week**, or **This Month** to filter by date range.

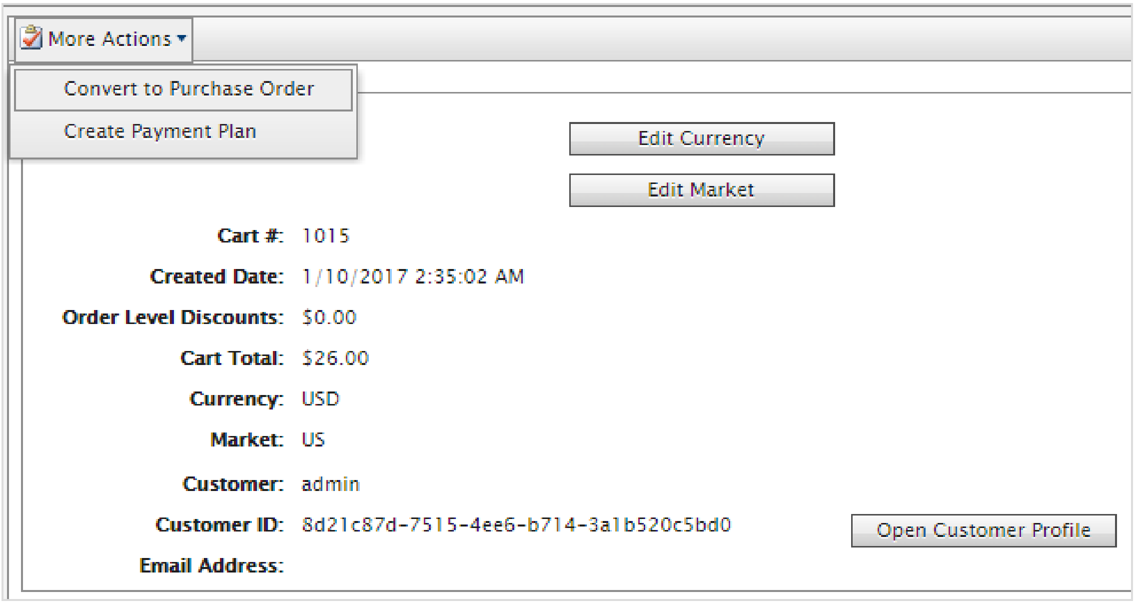


2. Select the **ID** number of the shopping cart you want to convert to a purchase order. The Cart View window appears with customer cart details.



- **Edit Currency**. Change the purchase order's currency.
- **Edit Market**. Change the purchase order's market.
- **Open Customer Profile**. View the profile of the registered customer (not available for anonymous shopping carts).
- **Line Items**. The list of items in the customer's shopping cart, displaying the **Quantity** of each item, **List Price**, and **Total**.
- **Notes**. Add, edit, or delete notes about the shopping cart.

3. Select **More Actions** > **Convert to Purchase Order**. The page refreshes and shows the Order view page for further processing of the purchase order.



Browsing orders

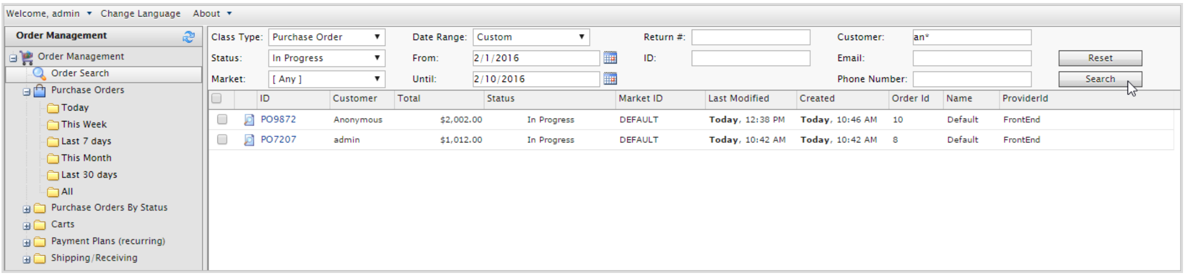
Customers create the majority of orders on the front-end in an web shop, and you likely have a significant amount of orders in your system. Episerver Commerce lets you browse and search orders in several ways.

- Filter and search orders by customer, status, market, date range and other properties.
- Use wildcards to limit search results.
- Preview orders while browsing.
- Viewing orders per market.

Searching and viewing orders

Go to **Commerce Manager** > **Order Management** and click **Order Search**.

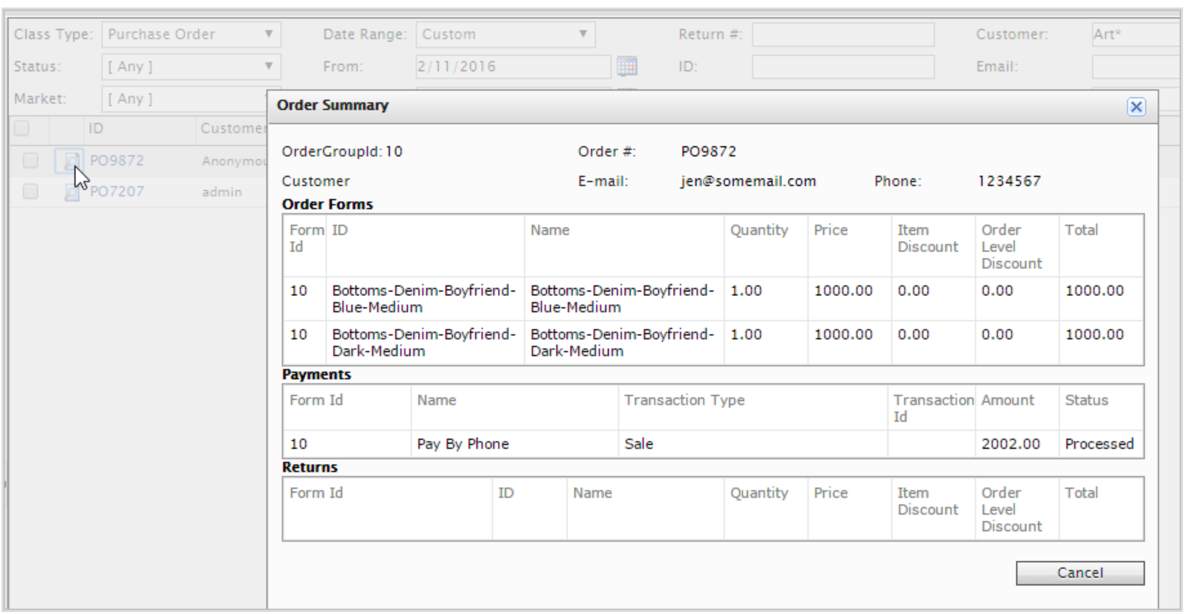
Search filtering options include markets and customer contact details. You can use wildcards ("*") to indicate partial search such as for a customer name. You can click column headers to sort the order list.



When browsing orders, you can for example see information about order creation date, market, and from where the order derives.

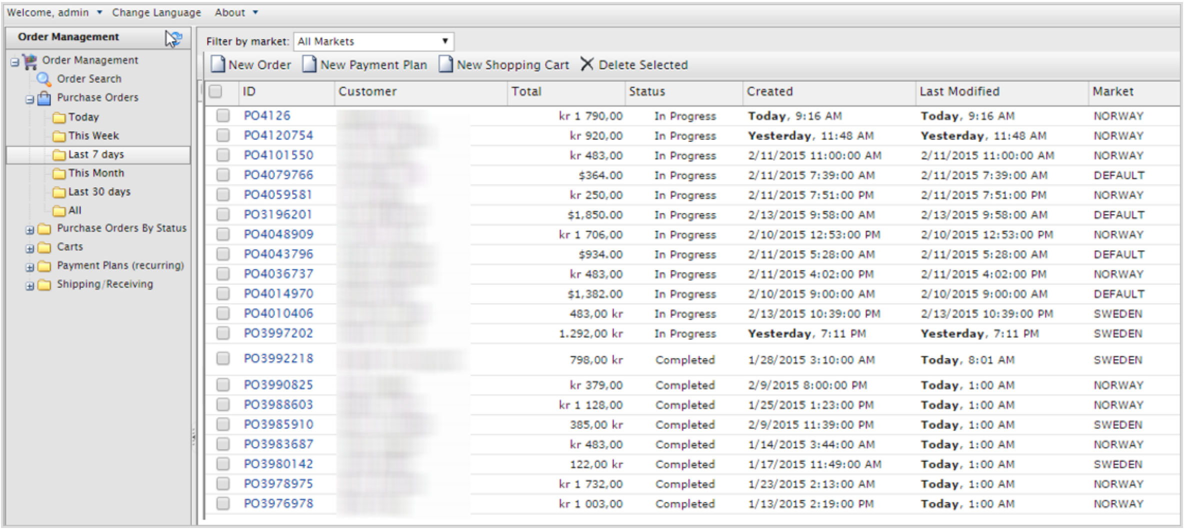
Order summary preview

Click the **Order Summary** icon next to the purchase order ID to display a summary of the order information.



Viewing orders by time range or status

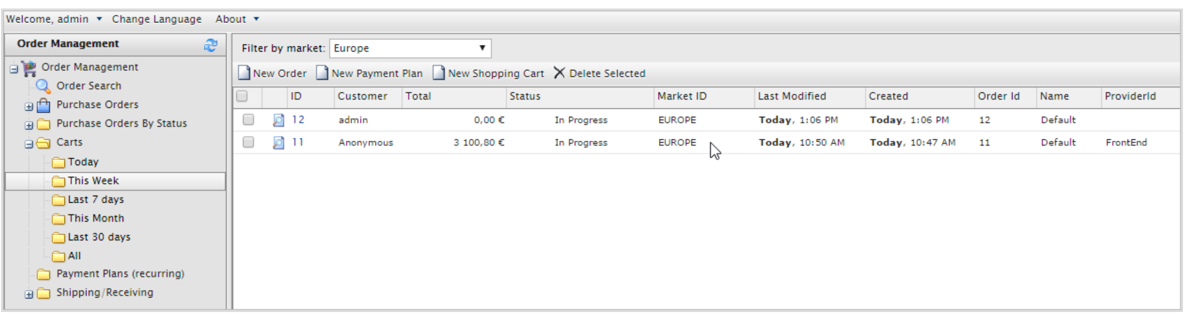
Using the options under **Purchase Orders** in the left column you can view orders by **time range**. You can for example display orders using **Last 7 days** and **Last 30 days**, to see the last orders from the previous month, in the beginning of a month.



Using the options under **Purchase Orders By Status** in the left column you can view orders by **status**.

Viewing orders per market

When viewing purchase orders, carts or payment plans, you can filter all views via a drop-down list per market to work with items for a specific market.



Creating an order

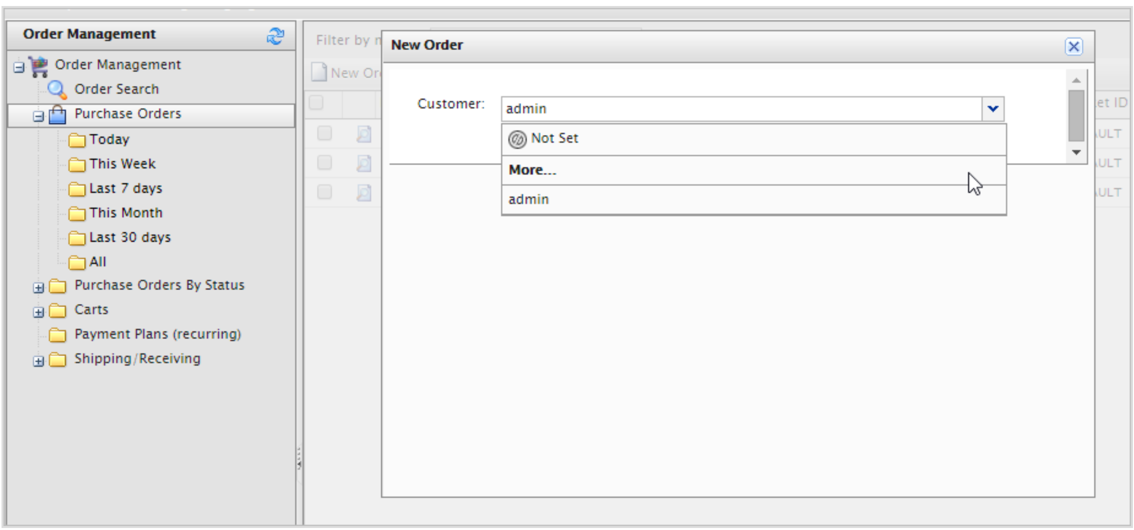
While customers create the majority of orders on the front-end in an web shop, you may sometimes need to manually create an order from Commerce Manager.

You can create orders from within **Order Management** or directly for a **Contact** in Customer Management. The order management option is faster and more common, providing more order alternatives. The Customer Management system, while a bit slower, lets you double-check a customer's information before beginning an order.

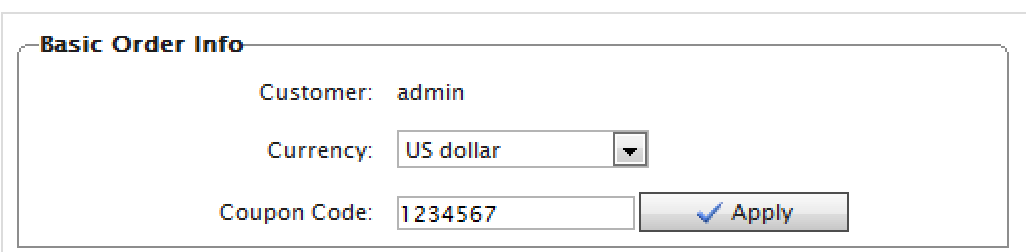
> Note: When you create an order, it appears in the **Purchase Orders** list with an order status of **In Progress**.

Creating an order from order list

1. Go to **Order Management** > **Purchase Orders**.
2. Click **New Order**. A dialog box appears.
3. Select the **Site** and **Customer** to which the new order applies. Select **Customer** > **More** if your customer is not listed.

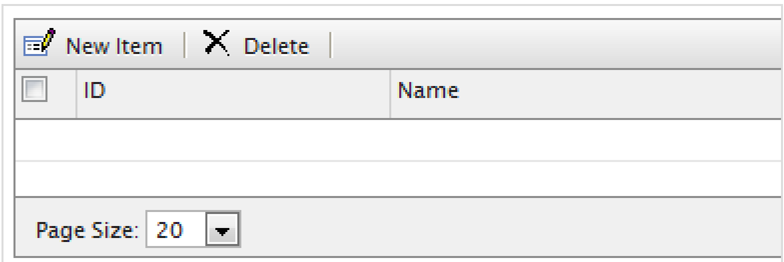


4. Click **OK**. The basic order information appears.
5. Fill out the purchase order and click **Apply**.

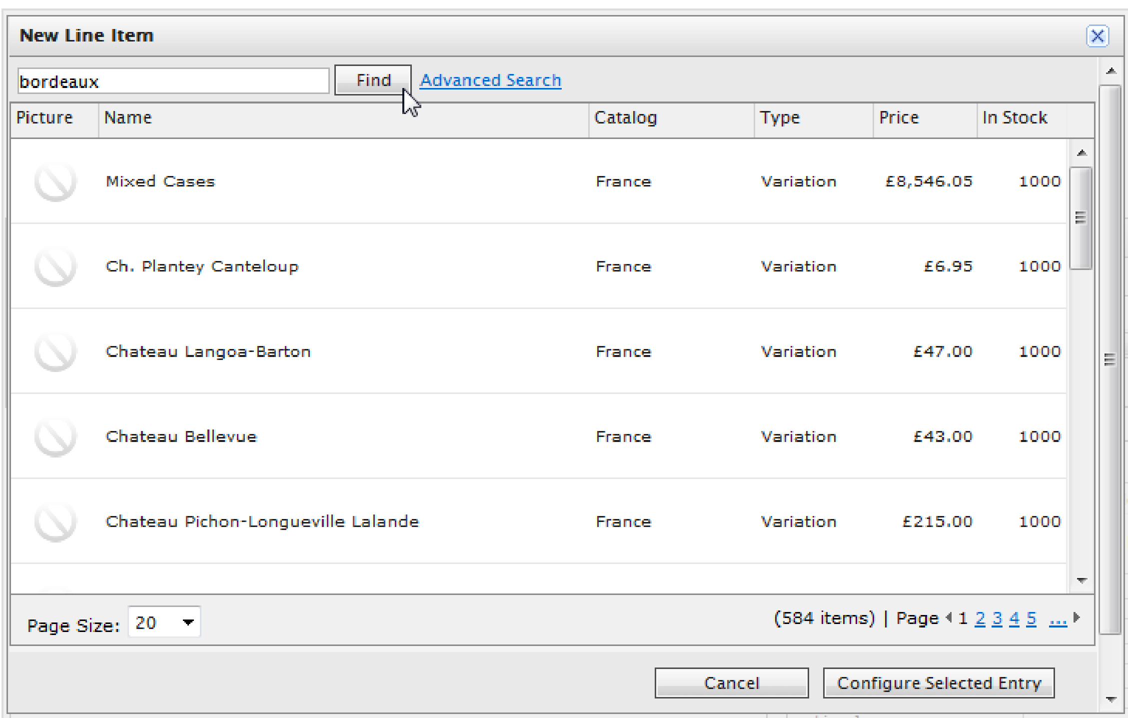


- **Customer**. Enter the name of the contact.
- **Currency**. Select the currency to associate with the purchase order.
- **Coupon**. If applicable, apply a coupon code that was created with a promotion to associate with the purchase order.

6. Click **New Item** to add items from the site catalog to the purchase order. A dialog box appears so you can select items from a site catalog.



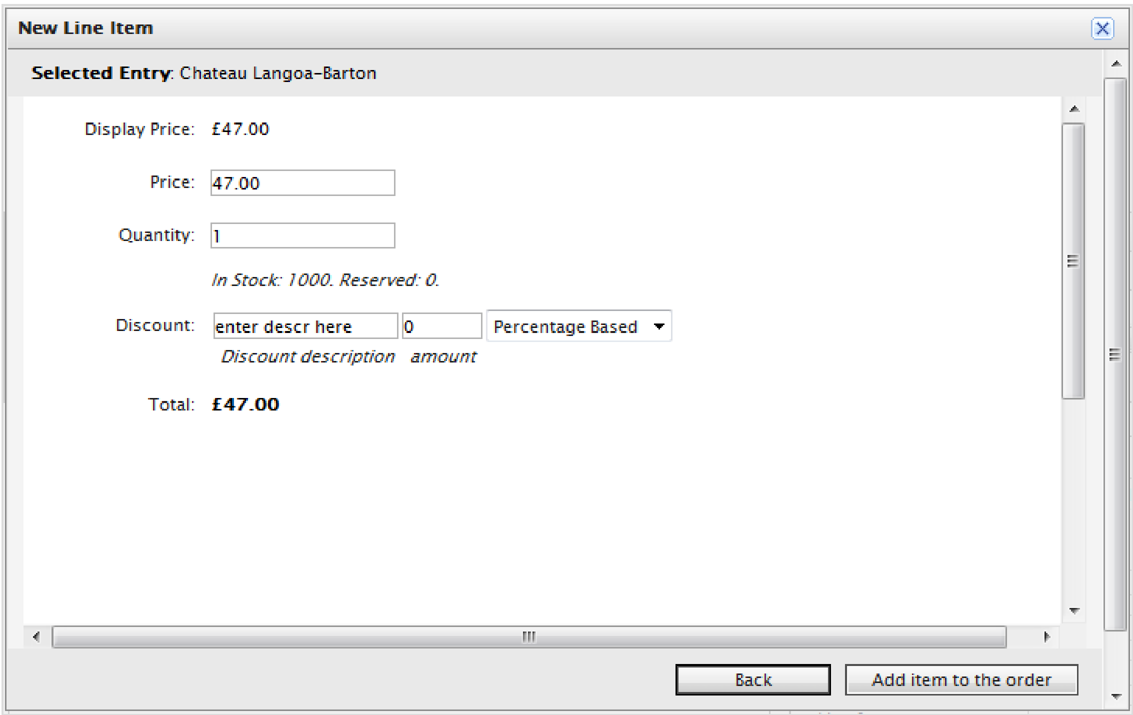
7. Search for items by entering search terms into the search field and clicking **Find.** To sort search results, select the column header.



Use the following fields to refine search results.

- **Select catalog**. Select which catalog to search.
- **Select language**. Select a language (such as German for items described in German).
- **Select entry type**. Select a type of entry, such as variant/SKU or bundle.

8. Select an item from the list and click **Configure Selected Entry**. The **New Line Item** dialog box appears.

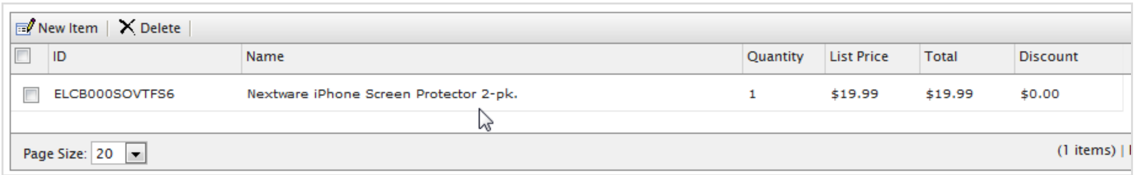


- **Display Price**. The price displayed on the public website. This is set at the catalog-entry level.
- **Price**. The actual cost of the item that is charged when the item is added to the order.
- **Quantity**. Set how many of the item to add to the order.
- **Discount**. You can apply a discount to the item, value or percentage based.

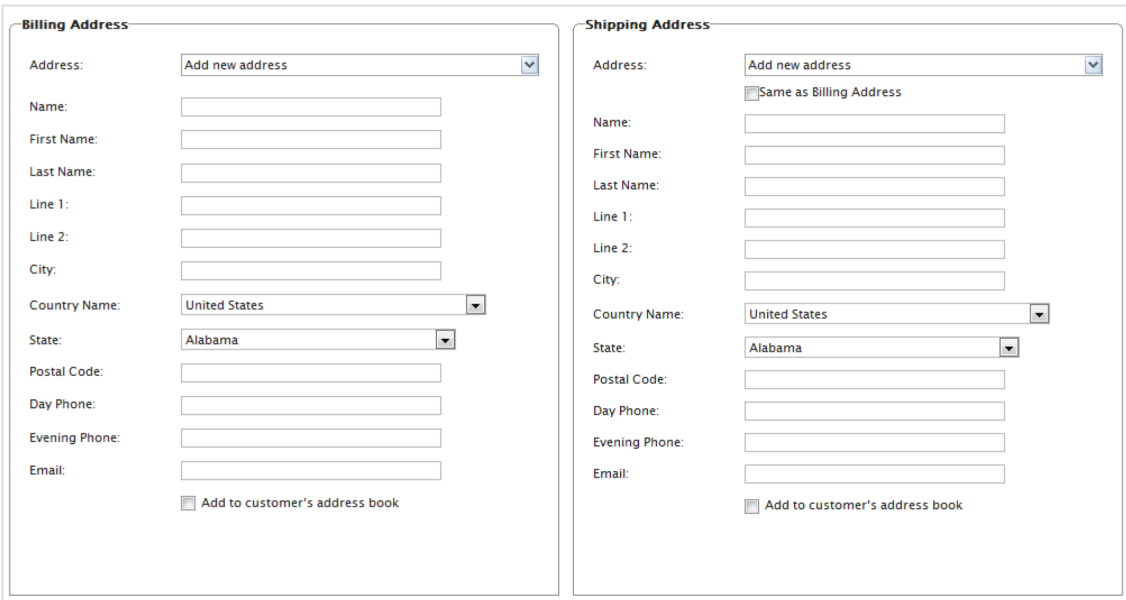
> Note: If you are using the new Discount system, discounts that you manually add to an order are included in the total discount calculations, and are listed under the order's Promotions as **Manual**.

- **Total**. The total is calculated, factoring in the actual price, quantity, and any discounts.

9. Click **Add item to the order**. The item appears on the Purchase Order form.

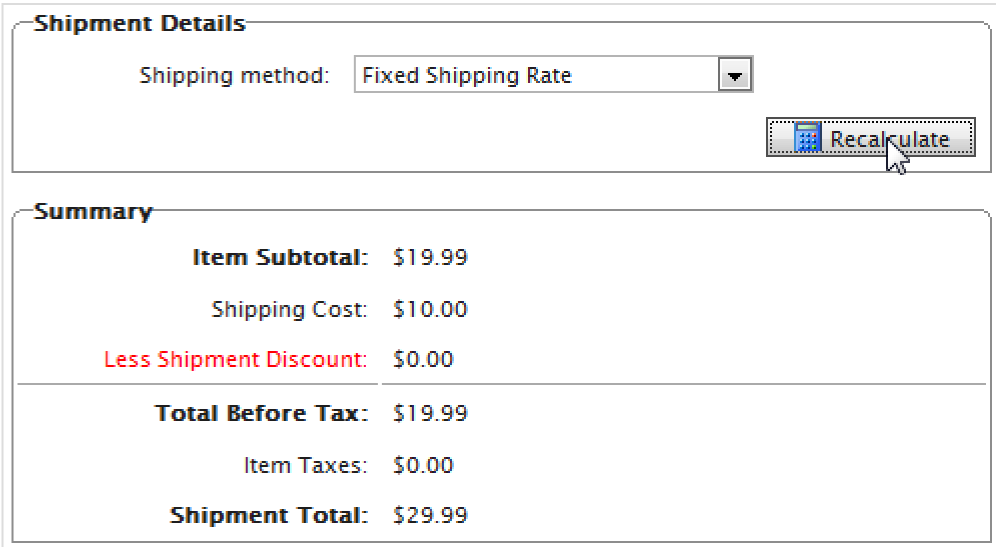


10. Enter a Billing and a Shipping Address. You can select the contact's existing address.



- Select **Add to customer's address book** if you want to save the address with the contact.
- If the Shipping Address is the same as the Billing Address, click **Same as Billing Address**. The Shipping Address form is populated with the Billing Address information.

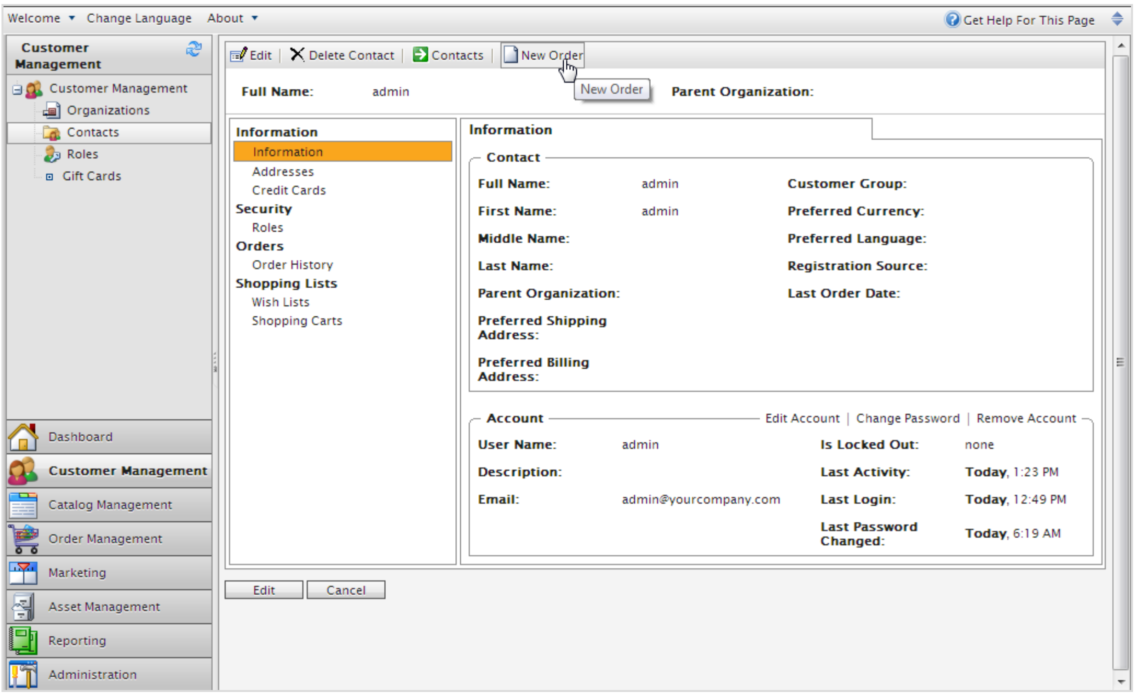
11. Select the order's **Shipping Method**. Select **Recalculate** to generate and display the cost summary.



12. Click **OK** to save the order.

Creating an order within a contact

1. Go to **Customer Management** > **Contacts**. Select a contact. Its details appear.
2. Click **New Order**. The **New Order** dialog box appears.



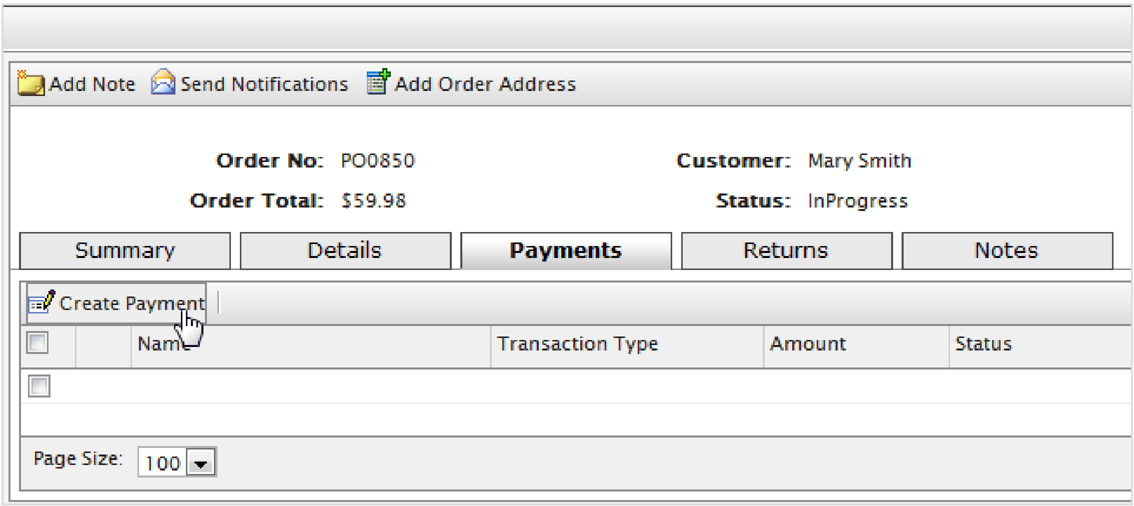
3. Select the site where you want to apply the order and click **OK**. The **Purchase Order New form** appears, prompting you to enter order information.
4. Follow the steps in Creating an order from order list to complete the order.

Processing an order

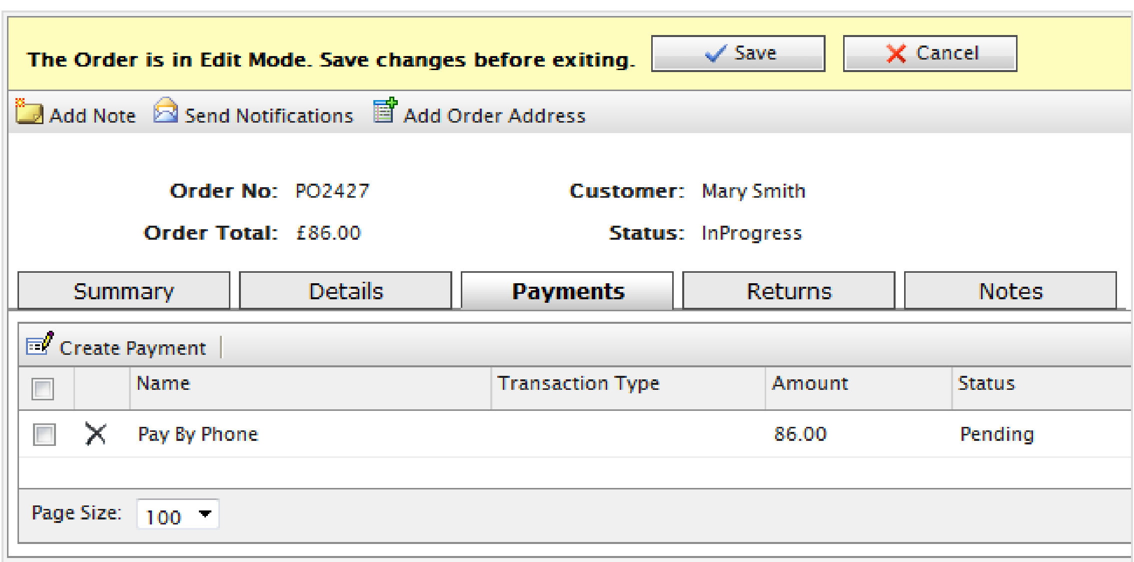
Order processing (or fulfilling) includes adding a payment and releasing the order for shipping. These steps are needed to complete the order and ship it to the customer. When the payment clears, the order is released for packing and shipping. Depending on how your system is set up, this process may be automatically handled by the system. This topic describes how to complete order processing manually.

> Note: When an order is processed and released for shipping, its status is changed to **In Progress** in the order list, and appears in the **Released for Shipping** list under **Shipping/Receiving**.

1. From **Commerce Manager**, go to **Order Management**.
2. Open the order you want to process.
3. To add a payment to the order, click the **Payments** tab then **Create Payment**.

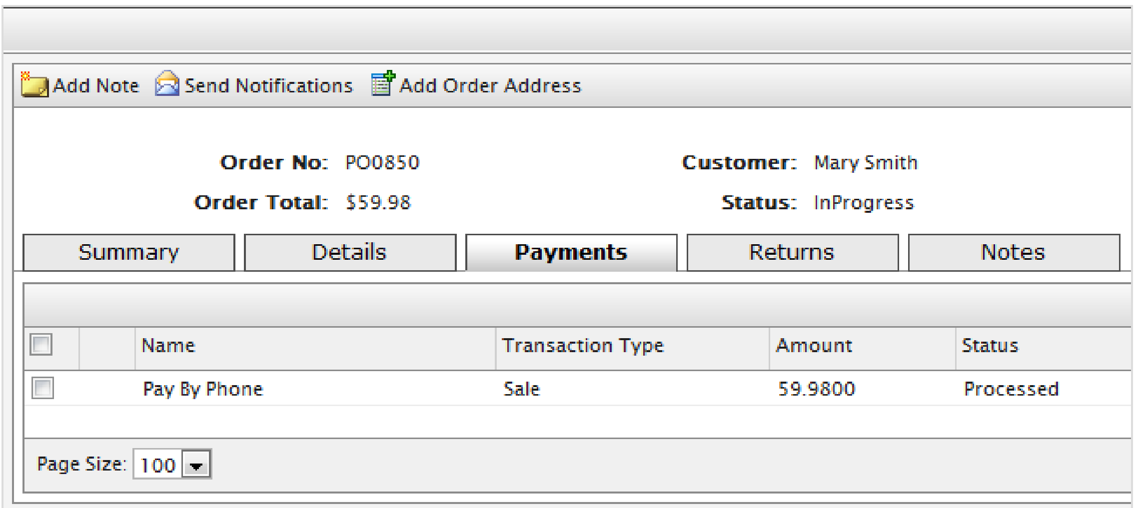


4. Enter the payment amount. The **Amount** field auto-populates the value of the total order, including shipping costs. However, you can change the payment value (for example, to create a split payment between two or more payment methods at the request of the customer).
5. From the drop-down list, select the **Payment Method**.
6. Click **OK**. The order appears in Edit Mode.

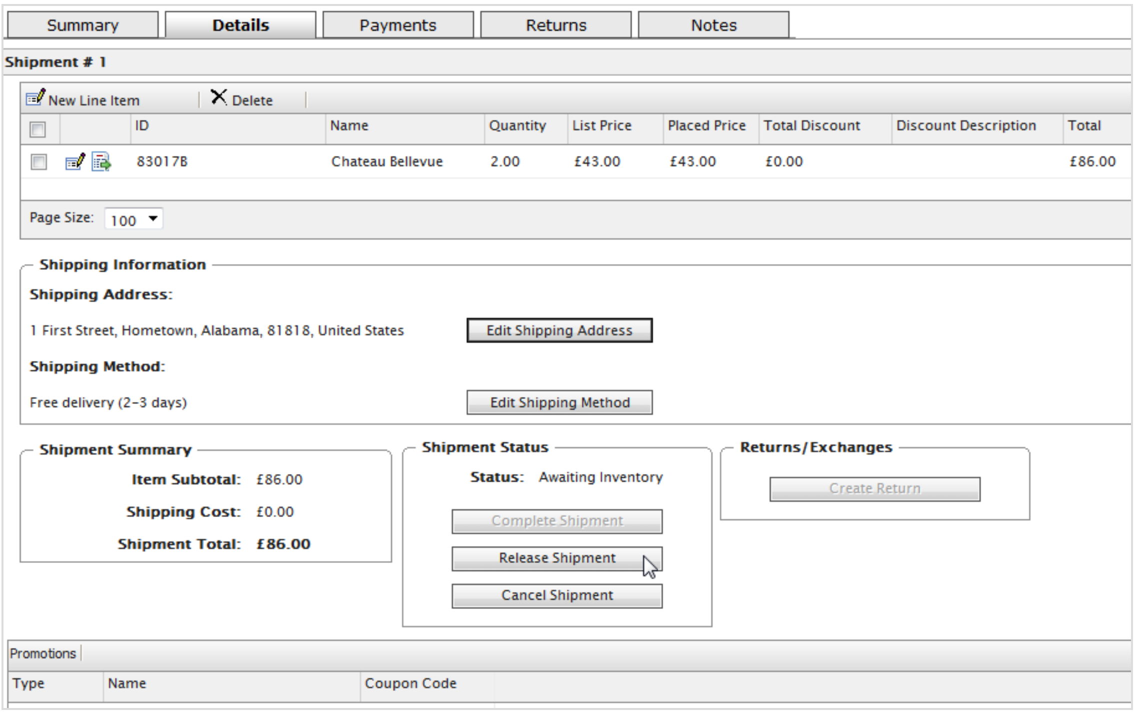


> Note: You can add more payments to the order in Edit Mode. However, if you click **Save**, you finalize the payment. At that point, you can no longer add or delete payments.

7. Click **Save** to exit Edit Mode and save your changes. The payment is processed for the amount specified.



8. Click **Details** to see that the **Shipment Status** is changed to **Awaiting Inventory**. When you determine the item's availability, click **Release Shipment** to release the order to your shipping department.



9. When you click **Release shipment**, the order's status changes to **Released**. To further process the order, your shipping department goes to **Order Management** > **Shipment**.

> Warning: If you click **Cancel shipment**, you cancel the entire order. You cannot undo the cancellation.

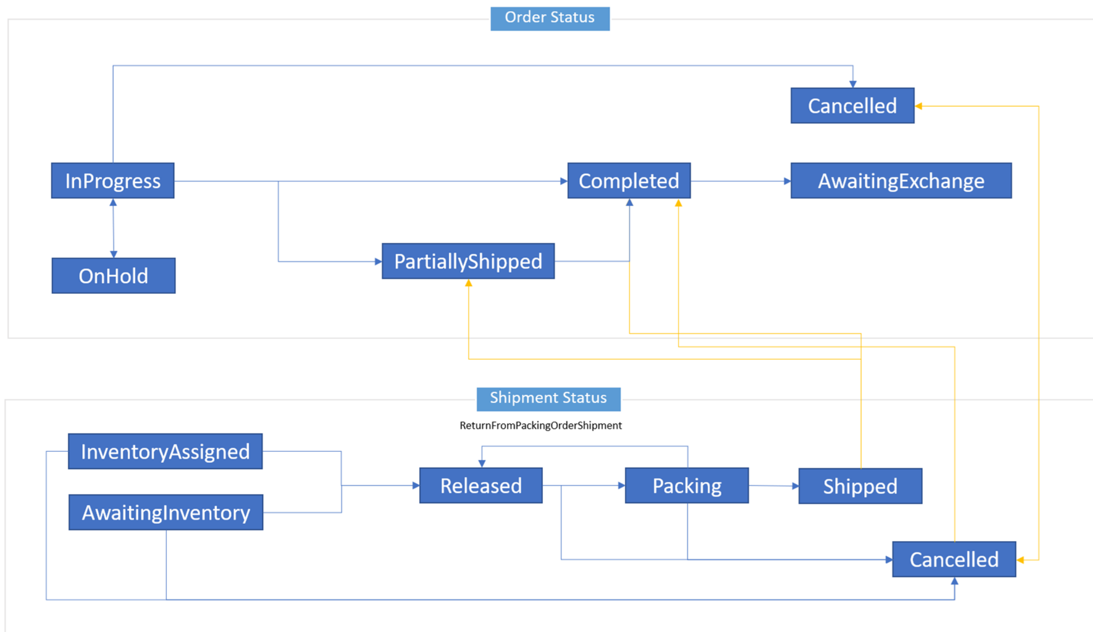
Shipment, order and return statuses

The following table summarizes the events surrounding an order, and lists the corresponding shipment, order and return status of each event.

Event	Shipment status	Order status	Return status
1. Payment pending	Shipment cannot be released. Order is not fully paid.	In progress	
2. Payment completed	• If the order quantity of any item in an	In progress	

Event	Shipment status	Order status	Return status
	order exceeds the available Instock Quantity, its shipment status is set to **Awaiting Inventory**. • If the quantity of all items in an order is less than the available Instock Quantity, its shipment status is set to **Inventory Assigned**.		
3. Release Shipment	Released	In progress	
4. Picklist: Add shipment to picklist	Packing	In progress	
5. Use **Complete Shipment** on the Shipping/Receiving screen	Shipped	Completed/Partially Shipped	
6. Create Return: Select item for return		Completed (Awaiting Return Completion)	Awaiting stock return
7. Acknowledge receipt of items		Completed (Awaiting Stock Return)	Awaiting completion
8. Complete return: Refund amount of returned item		Completed	Completed
Cancel Shipment		Canceled	

Status flow diagram

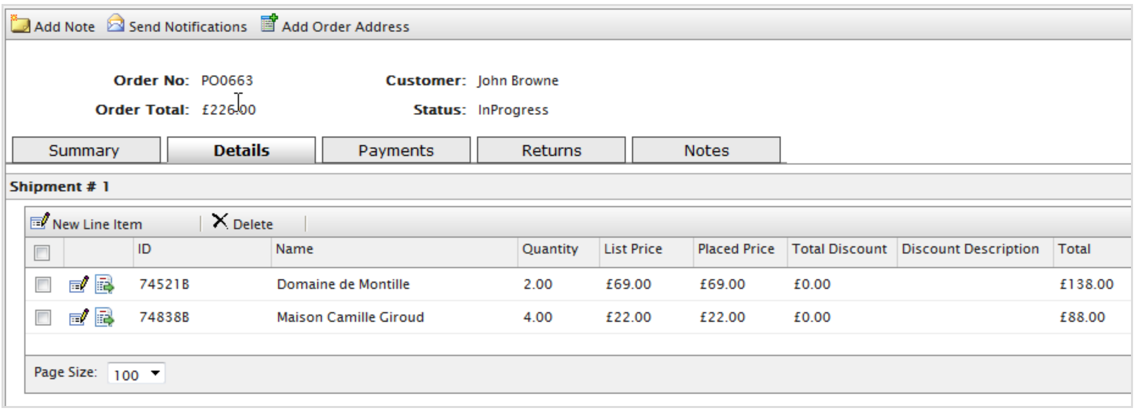


Splitting a shipment

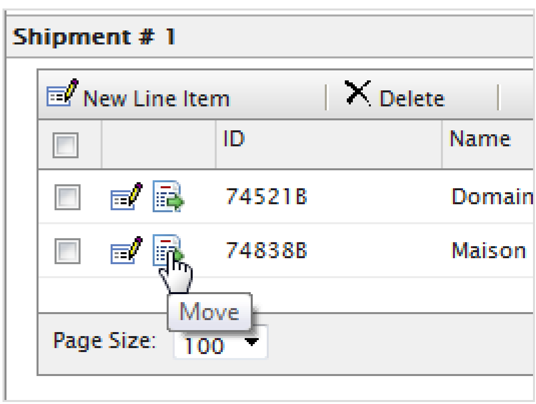
If an order has two or more items, you can split it into separate shipments, up to the number of items in a single order. You may split an order...

- to expedite items that are immediately ready for shipment, while other items require additional shipping lead time.
- to ship multiple heavy items, back-ordered items, or a large volume of items for ease of delivery and pickup.

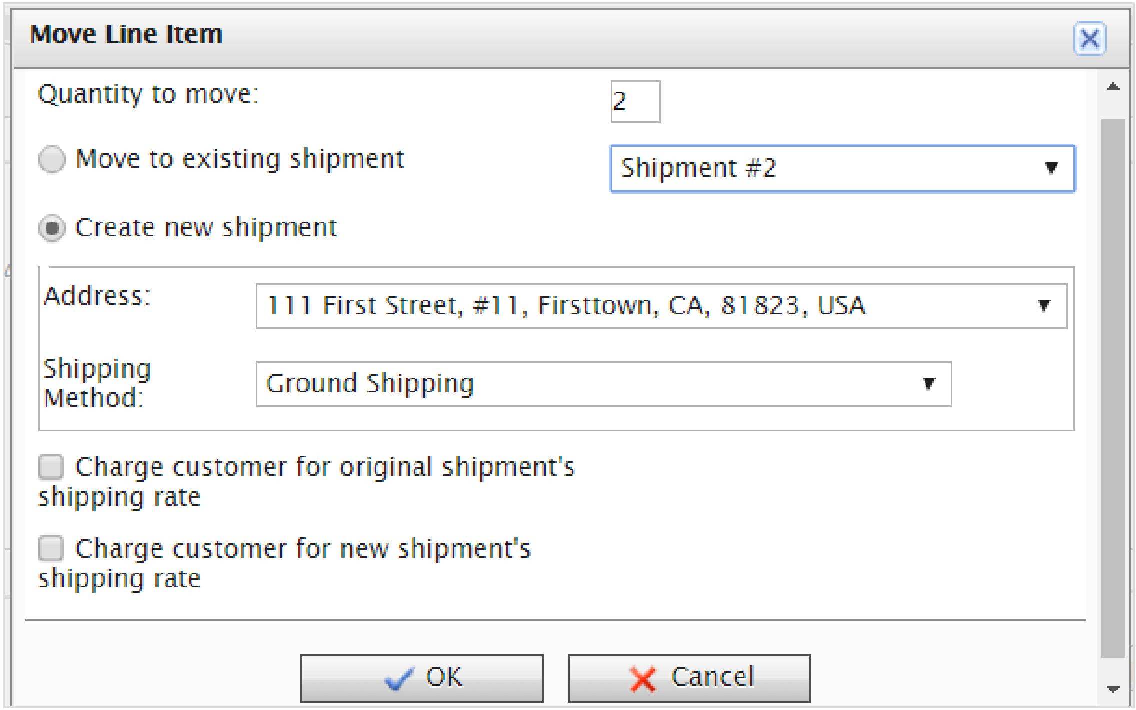
1. In **Order Management**, go to an existing purchase order or create a new one.
2. Click **Details** and look for **Shipment # 1**.



3. Click **Move** next to the item you want to move. The **Move Line Item** dialog box appears.

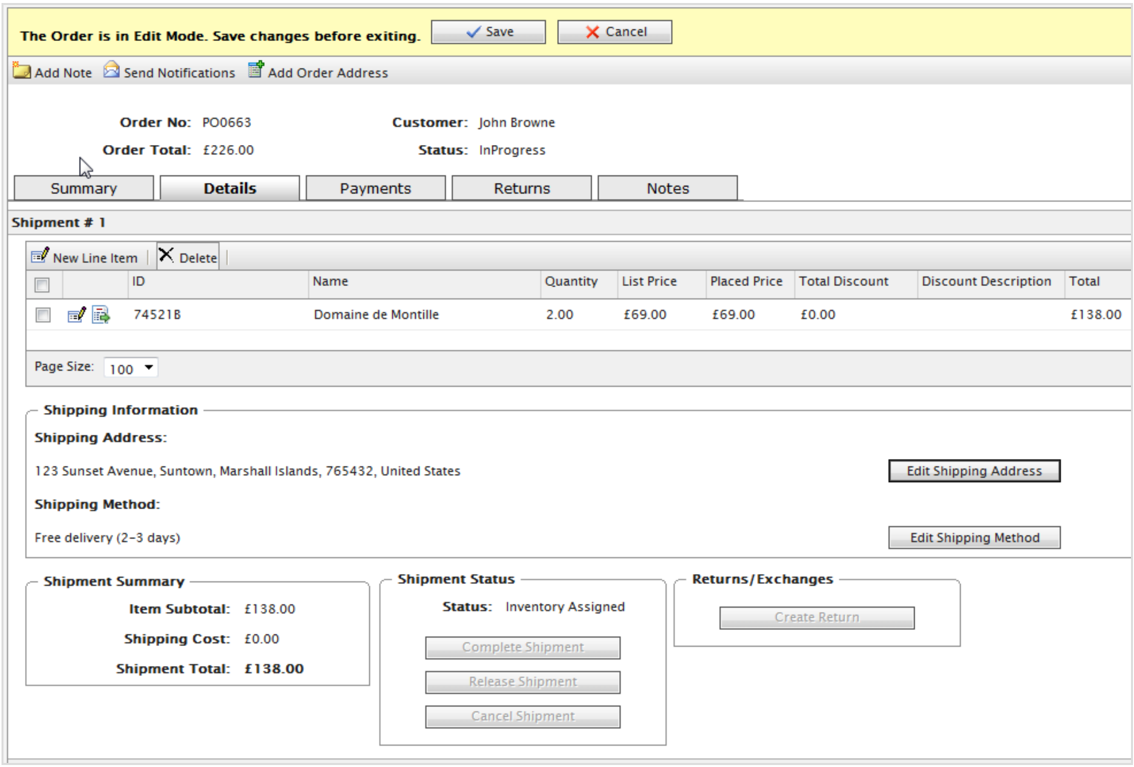


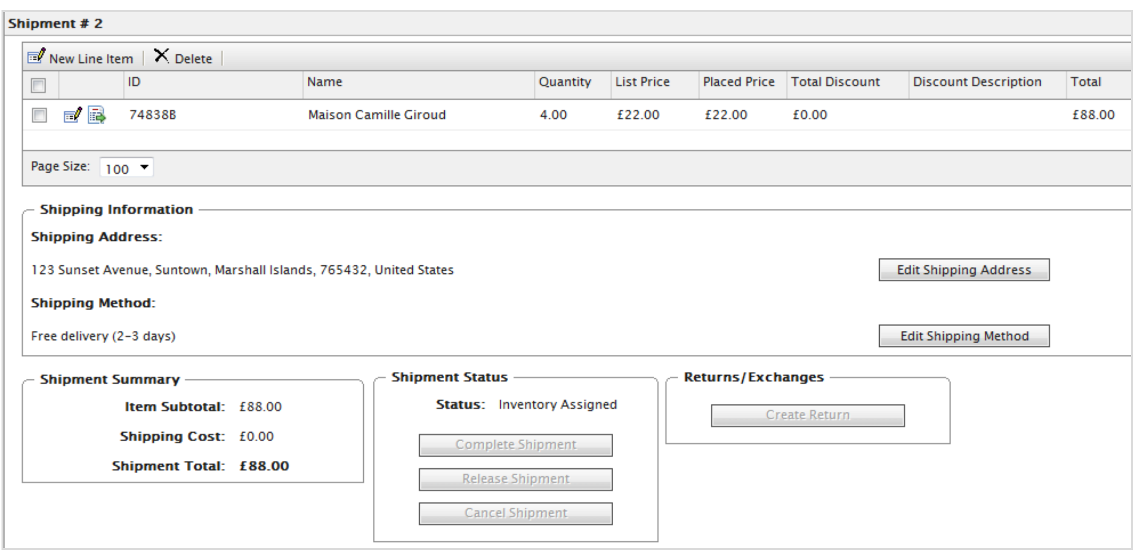
4. Select the data for the line item and click **OK** to save your changes.



- **Quantity to move**. Select the quantity of the item to move.
- **Move to existing shipment**. Select an existing shipment.
- **Create new shipment**.
- **Address**. Select an address.
- **Shipping method**. Select a shipping method.
- **Charge customer for original/new shipment's shipping rate**. Select which shipping rate to charge for.

The **Details** page shows the new shipment, which you can process separately from one another, but tied to a single purchase order.


The Order is in Edit Mode. Save changes before exiting.
Save
Cancel
Add Note
Send Notifications
Add Order Address
Order No: PO0663
Customer: John Browne
Order Total: £226.00
Status: InProgress
Summary
Details
Payments
Returns
Notes
Shipment # 1
New Line Item
Delete
ID
Name
Quantity
List Price
Placed Price
Total Discount
Discount Description
Total
745218
Domaine de Montille
2.00
£69.00
£69.00
£0.00
£138.00
Page Size: 100
Shipping Information
Shipping Address:
123 Sunset Avenue, Suntown, Marshall Islands, 765432, United States
Edit Shipping Address
Shipping Method:
Free delivery (2-3 days)
Edit Shipping Method
Shipment Summary
Item Subtotal: £138.00
Shipping Cost: £0.00
Shipment Total: £138.00
Shipment Status
Status: Inventory Assigned
Complete Shipment
Release Shipment
Cancel Shipment
Returns/Exchanges
Create Return


Shipment # 2
New Line Item
Delete
ID
Name
Quantity
List Price
Placed Price
Total Discount
Discount Description
Total
748388
Maison Camille Giroud
4.00
£22.00
£22.00
£0.00
£88.00
Page Size: 100
Shipping Information
Shipping Address:
123 Sunset Avenue, Suntown, Marshall Islands, 765432, United States
Edit Shipping Address
Shipping Method:
Free delivery (2-3 days)
Edit Shipping Method
Shipment Summary
Item Subtotal: £88.00
Shipping Cost: £0.00
Shipment Total: £88.00
Shipment Status
Status: Inventory Assigned
Complete Shipment
Release Shipment
Cancel Shipment
Returns/Exchanges
Create Return

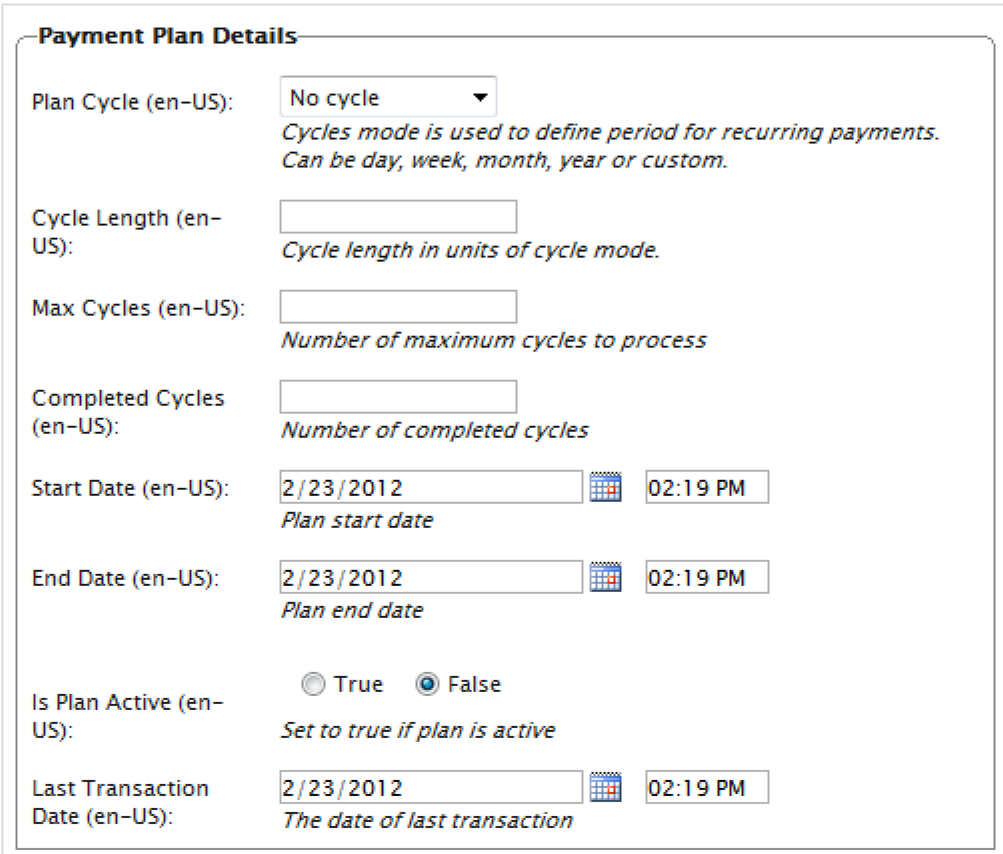
Setting up a payment plan

A payment plan works exactly like processing an order, except that a payment plan spreads payments over time, giving you flexibility in how you sell your products, and how a customer pays for them. Use a payment plan for large and complicated orders, orders that need to be shipped in sequence, magazine or grocery subscriptions, or expensive items.

A Customer Service Representative (CSR) sets up a payment plan to generate recurring payments. Payment plans are handled in the background through the Subscription payment plan scheduled job.

1. Go to **Commerce Manager > Order Management** > **Payment Plans (recurring)**.
2. Open up the **Payment Plans List** and click **New Payment Plan**.
3. Select a customer contact to whom the payment is attached. The **Payment Plan New** page appears.
4. Complete the form as you would when creating an order.

5. Set the cycles and parameters of the **Payment Plan Details**.



- **Plan Cycle**. (Cycle Mode)

  You can choose from the following plan cycles, which determine how often the customer is charged.

  - **No Cycle**. No recurring payment is created. The customer is charged once when the initial purchase order is created.
  - **Daily Cycle**. Recurring payment happens daily from start date.
  - **Weekly Cycle**. Recurring payment happens weekly from start date.
  - **Monthly Cycle**. Recurring payment happens monthly from start date.
  - **Custom1/Custom2**. These are placeholders for developers to create custom cycles within the **Mediachase.Commerce.Orders.PaymentPlanCycle** class.

- **Cycle Length**. Entering a value of 1 or higher determines the unit of time for the Plan Cycle. For example, if the Plan Cycle is **Daily**, and the **Cycle Length** is **3**, a transaction occurs every three days. If the Plan Cycle is **Monthly** and the **Cycle Length** is **1**, a transaction occurs each month.

- **Max Cycles**. Determines the maximum number of cycles to run for this payment plan. For example, if the **Max Cycles** is set to **2**, payment plan stops after two transaction cycles. If you want the plan to go on indefinitely, set **Max Cycles** to **0**.
- **Completed Cycles**. This tallies the number of completed cycles since the payment plan was created. When initially creating the payment plan, set this field to **0**.
- **Start Date**. Set the start date and time when recurring transactions begin.
- **End Date**. Set the end date and time when recurring transactions end.
- **Is Plan Active**. **True** enables the payment plan. Set **False** to create the payment plan but keep it inactive.
- **Last Transaction Date**. Logs the last transaction date. Leave the date and time fields as is when you create the payment plan.

6. Click **OK**.

Payment plan order details screen

The payment plan begins when the first purchase order is generated. You can create the purchase order manually (by clicking **Create First Purchase Order**) or automatically by the payment plans scheduled job.

After you create a new payment plan, a new **Order** page appears. This is slightly altered from the original Order detail page that appears after creating a new order. The changes include:

- Inability to manage shipment (release shipments for further processing).
- An **Orders** tab that shows a history of processed purchase orders from this payment plan.
- A **Create First Purchase Order** button that a CSR clicks to create the first purchase order related to this payment plan. The button disappears after creating the first purchase order manually, or if the payment plan scheduled job runs and generates the first purchase order. The payment plan goes into effect after the first purchase is generated.
- The generated purchase order number includes the parent ID of the payment plan. For example, if the payment plan parent ID is 35, subsequent purchase orders are numbered as PO35XXX.
- When a payment is added to a payment plan, the customer is not charged. The payment plan simply collects payment information until converted to a purchase order. The customer is charged once the purchase order is generated for the first time (and through subsequent purchase orders).

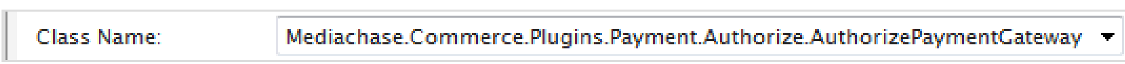
Editing and canceling a payment plan

1. To edit an existing payment plan, go to **Order Management** > **Payment Plans (Recurring)** or **Today/This Week/This Month/All**. Click the payment plan ID number to open the payment plans order details page and make edits.
2. To cancel a payment plan, click **Summary** then click **Cancel Payment Plan**.

Creating a recurring payment plan using Authorize.Net

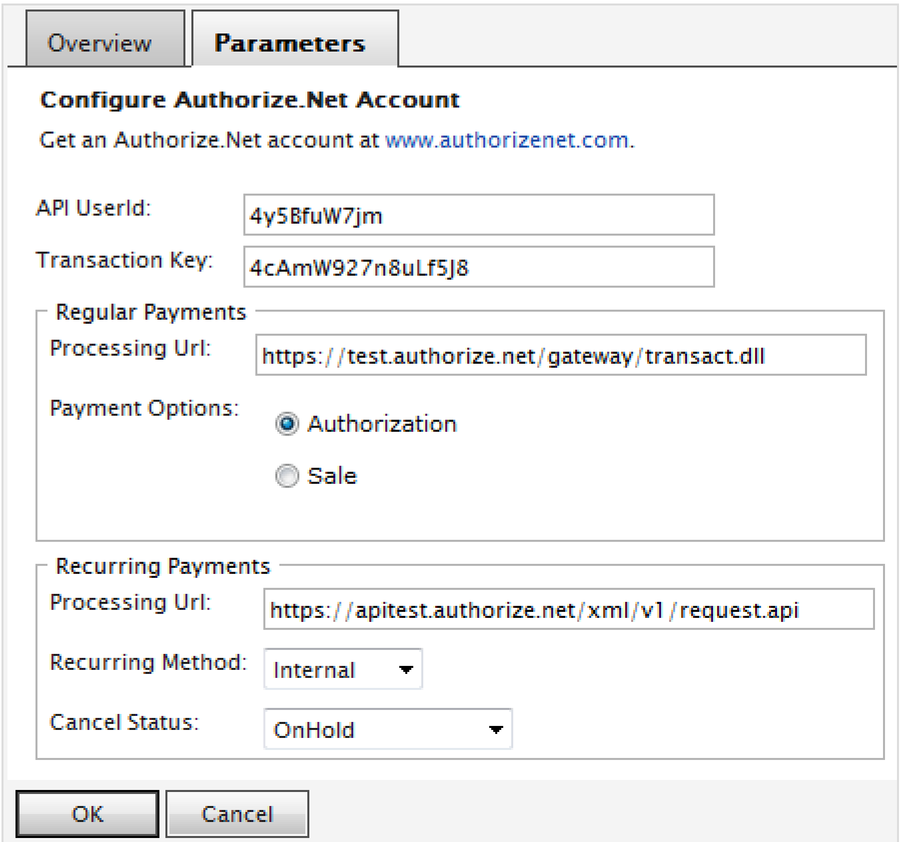
Episerver Commerce supports the **Authorize.Net** recurring payment plan gateway. For information about setting up payment methods, see Payments.

1. Go to **Administration** > **Order System** > **Payments** > **(Language)** and create a new payment method or select an existing payment method (such as **Pay by Credit Card**).
2. When you set up the parameters of the payment method, select the `Mediachase.Commerce.Plugins.Payment.Authorize.AuthorizePaymentGateway` class name.



3. Click **Yes** for **Supports Recurring**.
4. Click **OK**.
5. Click the name of the payment method again and click **Parameters**.
6. Configure your Authorize.Net account for both regular payments and recurring pay-

ments.



Editing, canceling, and deleting orders

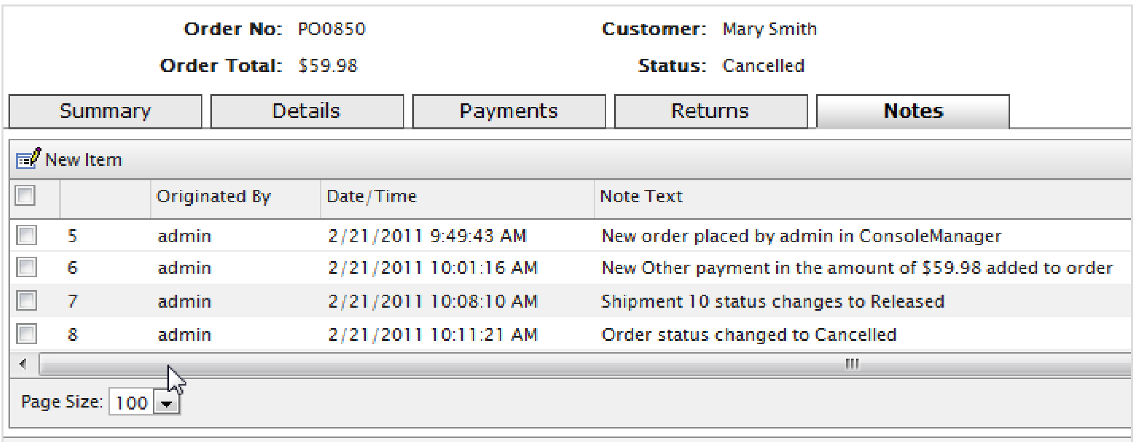
Editing an order

1. Go to **Order Management**.
2. Select the order to edit.
3. Edit the order.
4. Click **Save**.

Canceling an order

1. Go to **Order Management**.
2. Select the order to cancel.

3. Under the **Summary** tab, click **Cancel Order**. The status of the order changes to **Canceled** but it remains in the order list for viewing. The cancellation of the order is logged under the **Notes** tab.



Deleting an order

> Warning: When you delete an order, it is removed from the order list.

1. Go to **Order Management**.
2. Select one or more orders to delete.
3. Click **Delete Selected**.
4. Click **OK**.

Shipping and receiving

Completing the order processing includes these tasks:

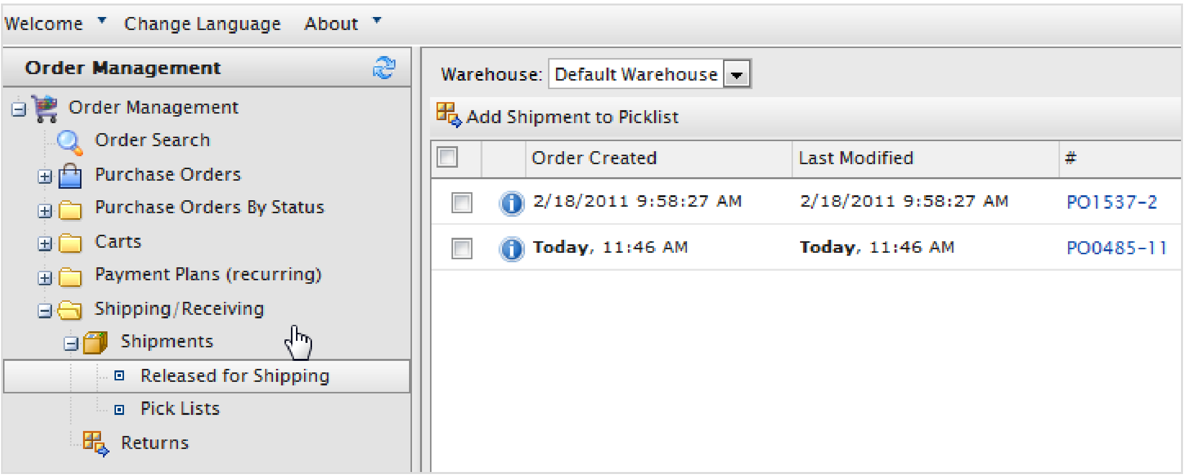
- Completing the shipment by preparing the physical package to be shipped.
- Creating picklists for picking up the physical items in the warehouse.

Shipping and Receiving are split into two areas: shipment and return.

- A shipment controls items released for shipping and picklist, or items that are packed and prepared for shipping or ready for pick up.
- Returns are incoming items that are returned by customers for some reason, such as faulty items that need to be replaced by exchange. Episerver processes returns sim-

ilarly to outgoing shipments, and manages returned items as incoming package. You can track them at **Order Management** > **Shipping/Receiving** > **Shipments** > **Returns**.

The **Shipments** view contains the following information.



- **Order Created**. Specifies when an order was created. This is useful, for example, if you want to ship orders by date and time.
- **Last Modified**. If changes were made to an order, the last modification date appears here.
- **Number #**. The order's ID number. The first number is the unique tracking number. The second number is the unique tracking number assigned to the order for shipping purposes.
- **Customer**. The full name of the customer as it appears on the package. This is useful, for example, if you want to ship orders all together to one customer.
- **Shipping Method**. Specifies the order's shipping method. Shipping methods are specified in the Administration > Shipping methods section of Commerce Manager.
- **Address**. The address that the package is being shipped to.
- **Warehouse**. A warehouse is (most likely) a physical location where you store goods before delivery. You can select any warehouse in the system. Remember to select the correct one when attempting to check for shipments.

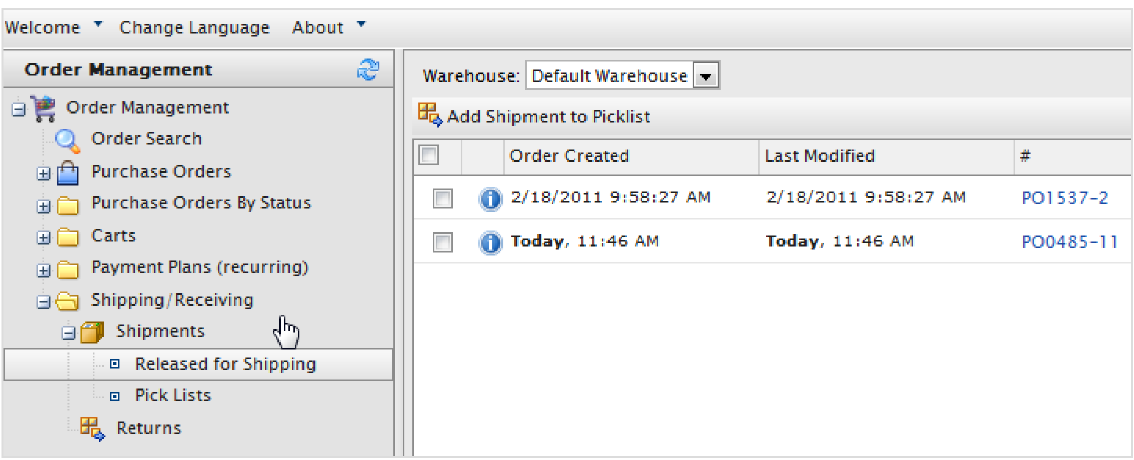
  You can change the **Default Warehouse** in the Administration section of the Commerce Manager. If you have only digital products, the default warehouse is adequate.

Creating a picklist

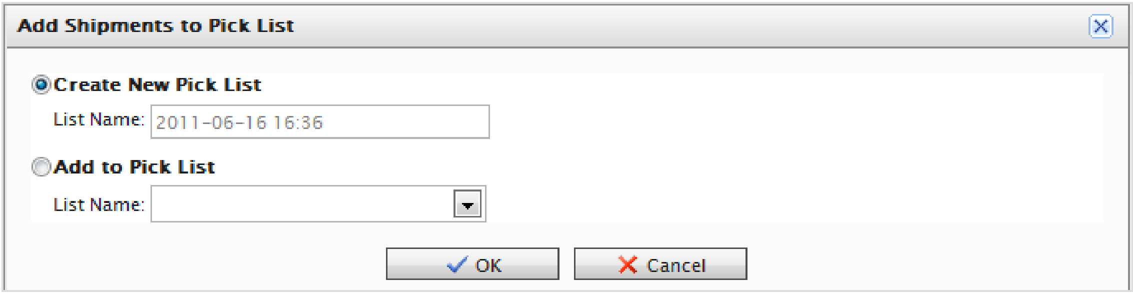
After you create and process an order, its status is **Released for Shipping**. Before you can complete or ship an order, you must add it to an existing picklist or create a new picklist. After adding a shipment to a picklist, you select the warehouse where the physical item is packed and shipped.

> Note: After an order is added to a picklist, its status is **In Progress** in the order list. It disappears from the **Release for Shipping** list and appears in the **Picklist** listing, under **Shipping/Receiving**.

1. Go to **Order Management** > **Shipping/Receiving** > **Shipments** > **Released for Shipping**. The **Released Shipments** list appears.



2. Select a **Warehouse** to determine from where the item is packed and shipped.
3. Select orders to add to the picklist and click **Add Shipment to Picklist**. The **Add Shipments to picklist** dialog box appears.
4. You can create a **New Pick List** (by default, the **List Name** shows the date and time the picklist was generated), or add shipments to an existing picklist.



> Note: You cannot change the name of the picklist.

5. Click **OK**.

Completing a shipment

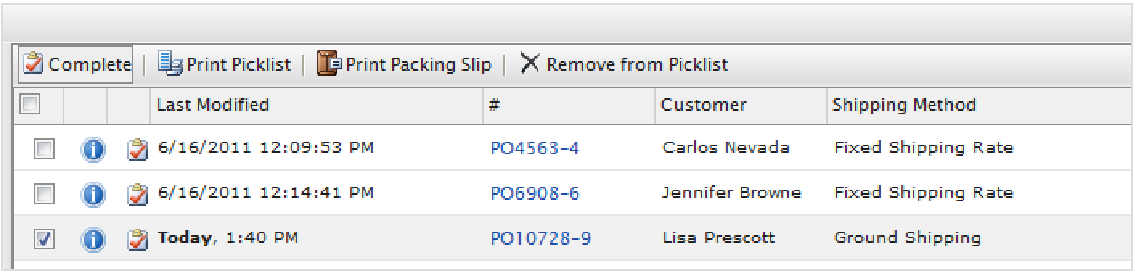
This is the final stage of an order where you prepare the physical shipment by assigning tracking information, preparing a packing slip and sending the package when the order is completed. The order becomes available for creating a return if needed; returns can only be created for completed orders.

> Note: A completed order has the status **Completed** in the order list and disappears from the **Picklist** listed under **Shipping/Receiving**. The picklist remains in the list even if there are no packing shipments remaining.

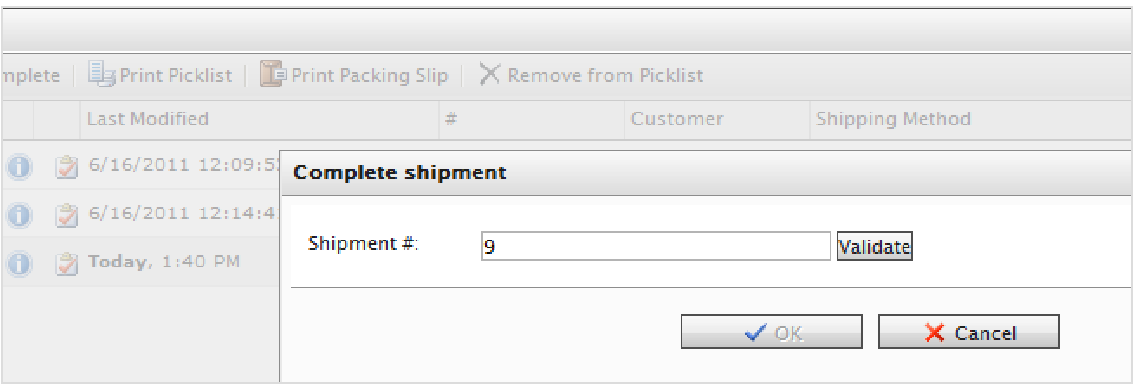
Use the following methods to complete a shipment.

Method 1

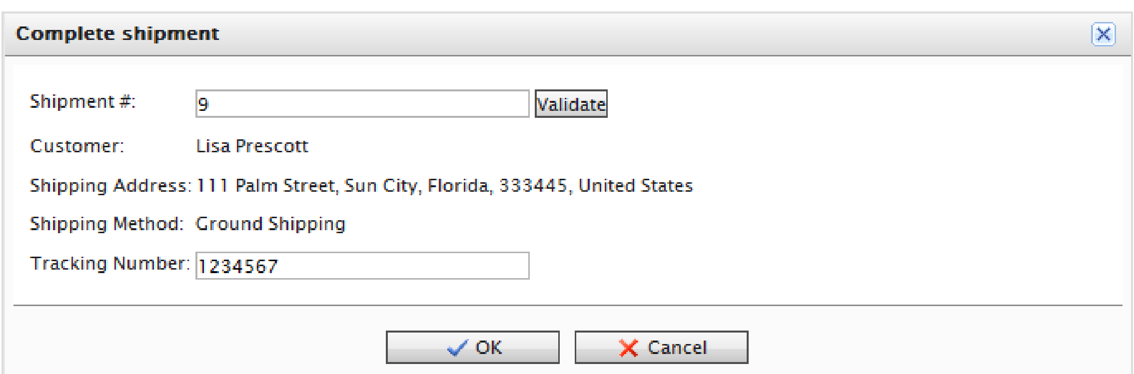
1. Select the box next to the shipment then click **Complete.** The **Complete shipment** dialog box appears.



The default shipment number is based on the number after the purchase order number. For example, in the above image, the PO number for the selected order is PO10728-9. The number after the dash is the number to enter into the text field. In this case, it is **9**.



2. Click **Validate**. When validated, you see the customer name, shipping address, shipping method, and a field to enter the tracking number provided by the shipping provider. Enter a tracking number and click **OK**. The shipment is sent out and completed. The purchase order status changes to **Completed**.

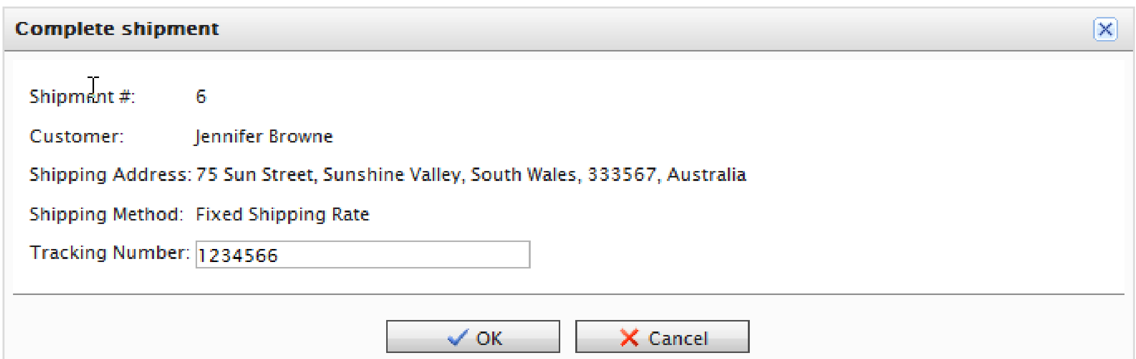


Tip: The **Complete shipment** dialog box appears over the purchase order number. To reference the shipment number without closing the dialog box, move the dialog box so you can see the PO (purchase order) number by hovering over the **Complete shipment** title bar.

Method 2

1. To complete a shipment, click **Complete Shipment** . The **Complete shipment** dialog box appears.

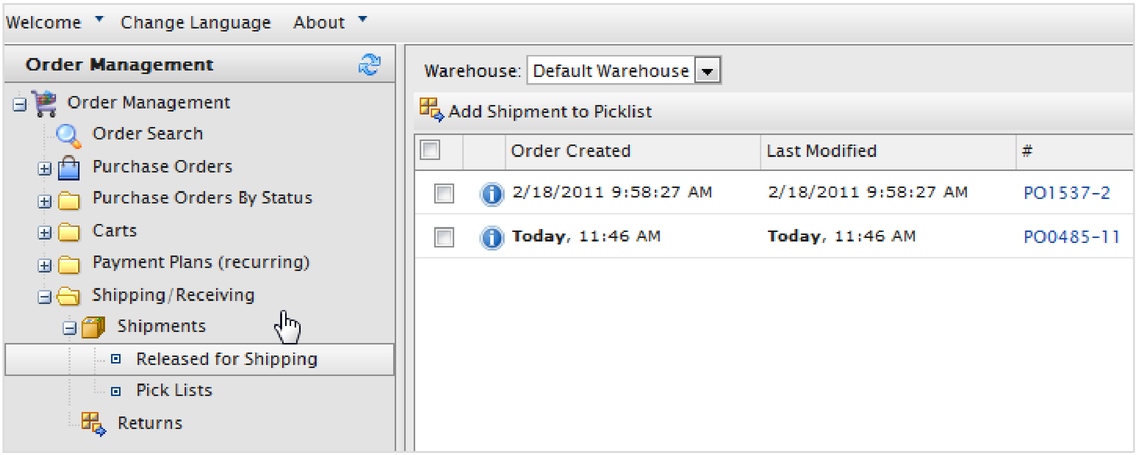
   The shipment number is already validated with the last number of the PO number.



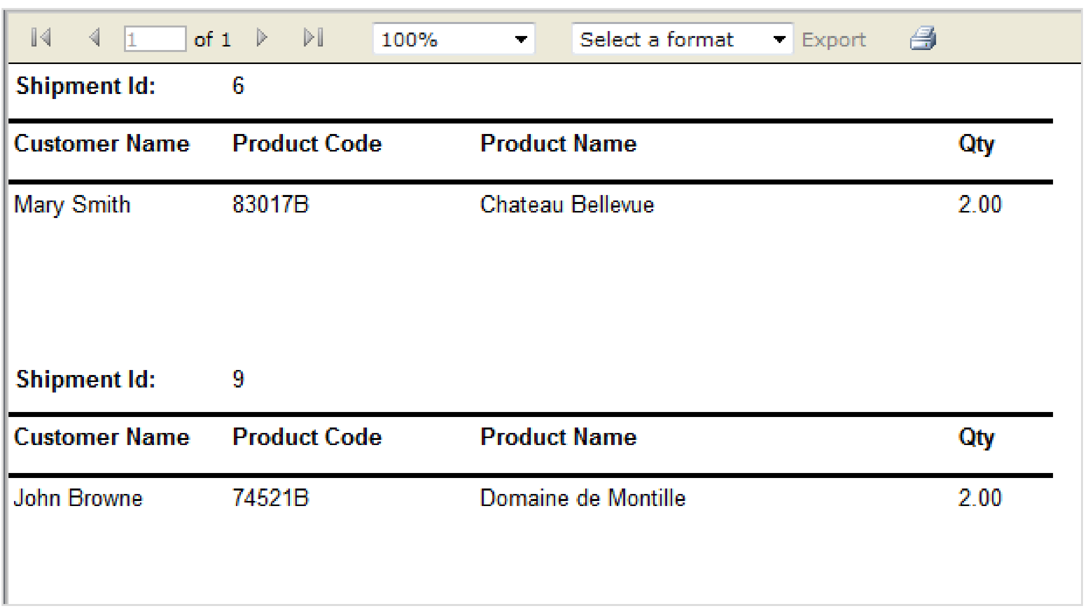
2. Enter a tracking number provided by the shipping provider.
3. Click **OK** to complete the shipment and order.

Printing a picklist and packing slip

1. Go to **Order Management** > **Shipping/Receiving** > **Shipments** > **Pick Lists**. You can filter the view by choosing which warehouse the picklist was generated in. You can also sort existing picklists by **Name**, **Packing Shipments**, **Warehouse**, and **Created By**.



2. Select an existing picklist. The **Packing Shipments** window appears.
   - To print a picklist, select one or more purchase orders and click **Print Pick List** to generate a printable and exportable (Excel or PDF) picklist.



   - To print a packing slip, select one or more purchase orders to include in the packing slip then click **Print Packing Slip**.

Removing items and deleting picklists

Removing items from a picklist

1. Go to **Order Management** > **Shipping/Receiving** > **Shipments** > **Picklists**.
2. Select a picklist to display the related order shipment.
3. Select the shipments you want to remove and click **Remove from Pick List.**
4. Click **OK**.

Deleting picklists

> Note: A picklist must be empty of packing shipments (0 shipments remaining) before you can delete it.

1. Go to **Order Management** > **Shipping/Receiving** > **Shipments** > **Picklists**.
2. Select one or more picklists.
3. Click **Delete Selected**.
4. Click **OK**.

Returns and exchanges

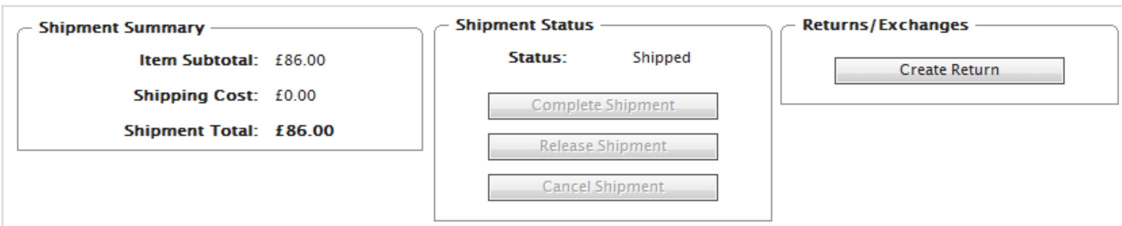
After a package is finalized and shipped out, you can process a return and exchange directly in the order. A return is the actual return of the item. You can refund the customer or offer an exchange of the same product or something else.

A separate exchange order (denoted by EO, instead of PO) is tied to the original purchase order. An exchange order is similar to a purchase order, because it involves payment processing and releasing packages for shipment.

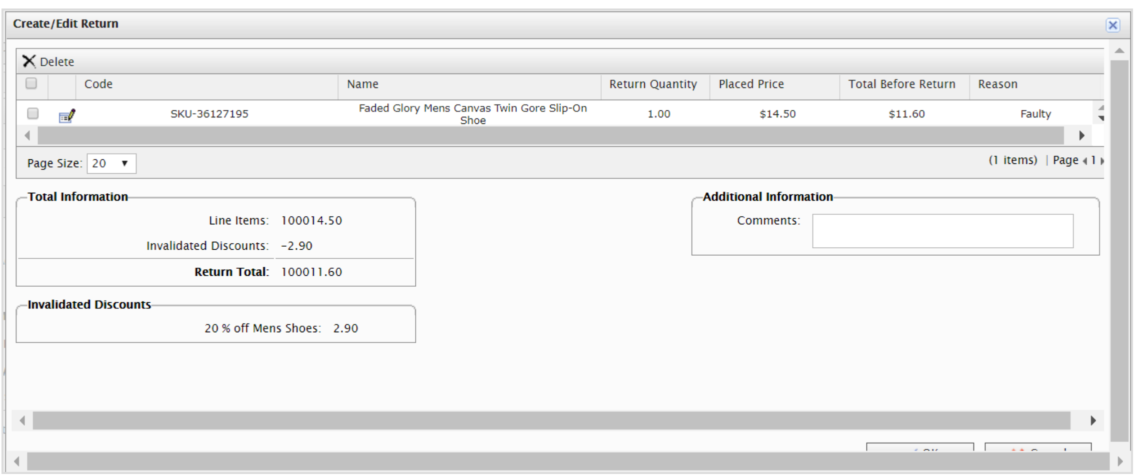
> Note: You can only process a return or an exchange *after* a purchase order's status is **Completed**.

Initiating a return

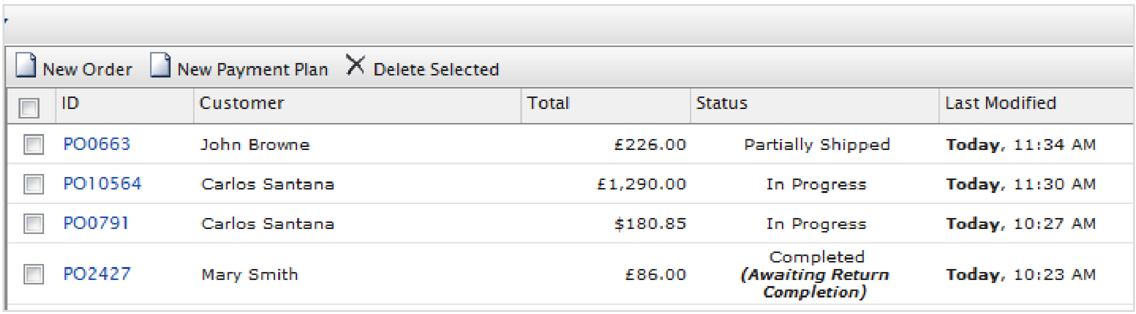
1. Go to a purchase order that is finalized and shipped.
2. Go to the **Details** tab and, under **Returns/Exchanges**, and click **Create Return**. The **Create/Edit Return form** appears.



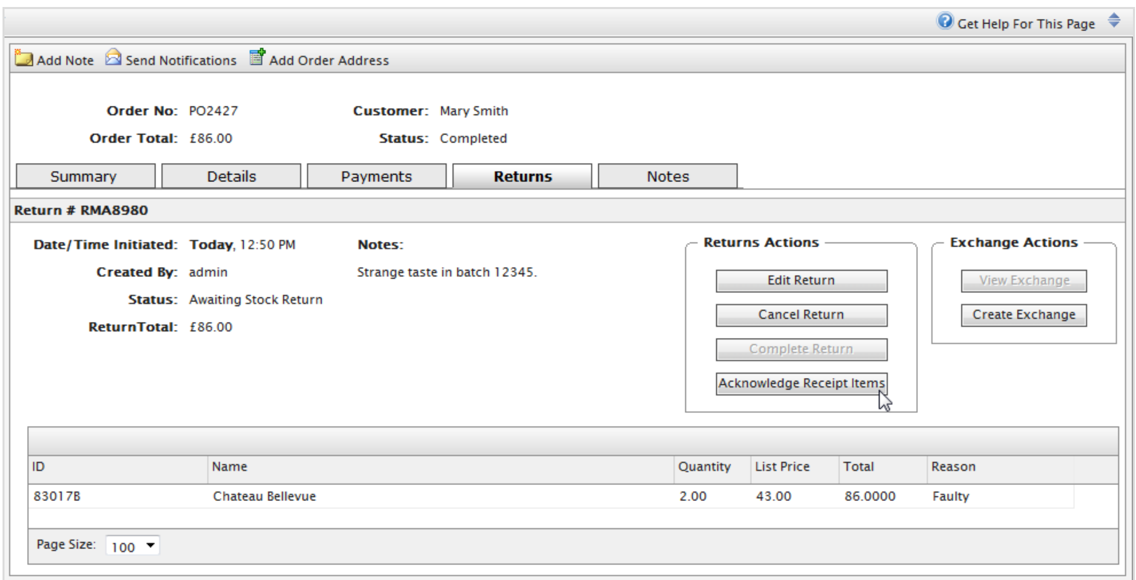
3. Click **New Item** to specify items to be returned. The Line Item drop-down list defaults to items from the original purchase order.
4. Set the **Return Quantity** and the **Return Reason** from the drop-down list. You can also add free text comments.



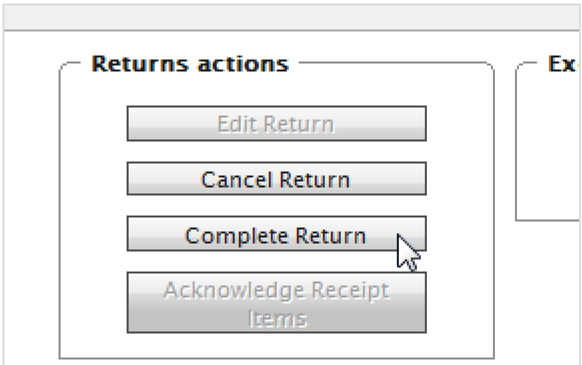
5. Click **OK**. The purchase order goes into **Edit Mode**.
6. Click **Save** to continue the return process. In the **Order List**, the order appears with status **Completed/Awaiting Return Completion**.

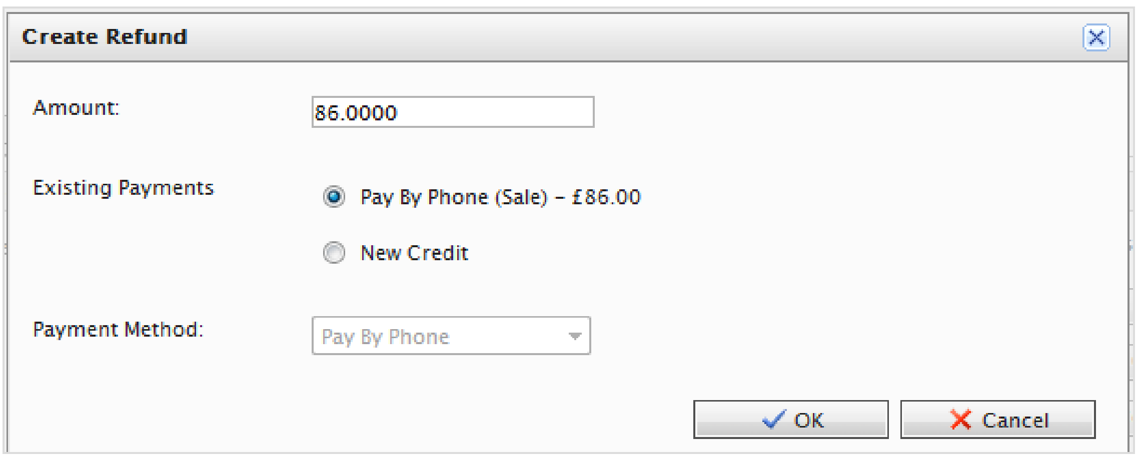


7. Click the **Returns** tab to process the return further. For example, after the shipping department notifies you that they received the returned item.
8. Click **Acknowledge Receipt Items**. (You can also choose to edit the return or cancel the return completely.)



9. Click **Complete Return** to open the **Create Refund** form.





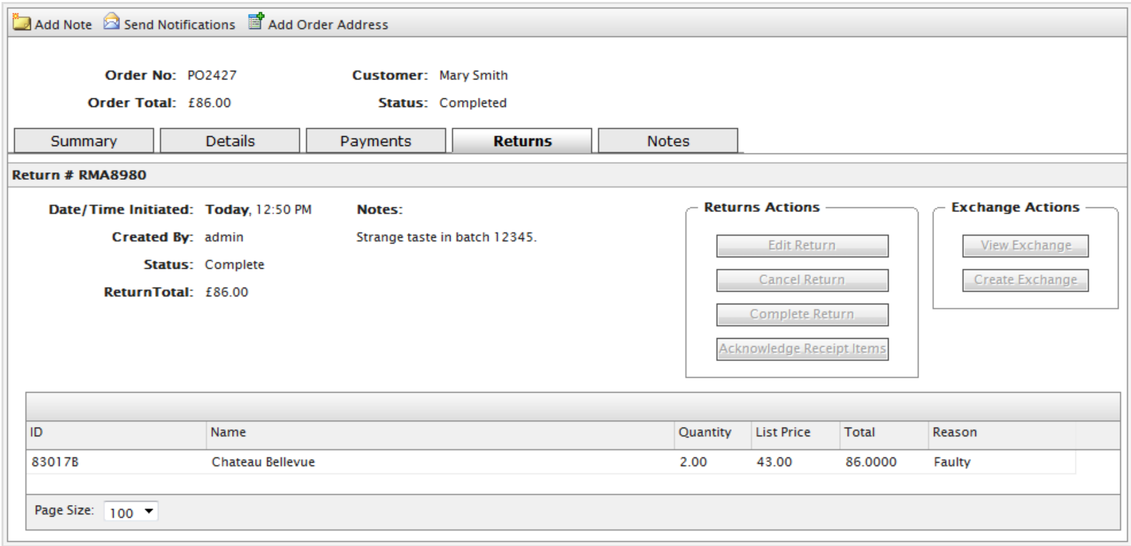
- **Amount**. Defaults to the item's invoice cost (excluding shipping costs). For example, if the item cost $49.99 and the shipping cost was $2, the **Amount** box shows $49.99.

  You can change the refund amount, including the full cost of the order, items plus shipping cost, and so on.

  By default, the refund is deposited based on the payment method the customer used for the order.

- **Existing Payments**. If the customer wants the refund processed and deposited to a different credit card or payment method (such as cash, money order, or electronic transfer), click **New Credit**. Then, enter the alternate credit card or other refund information.
- **Payment Method**. Select the method.

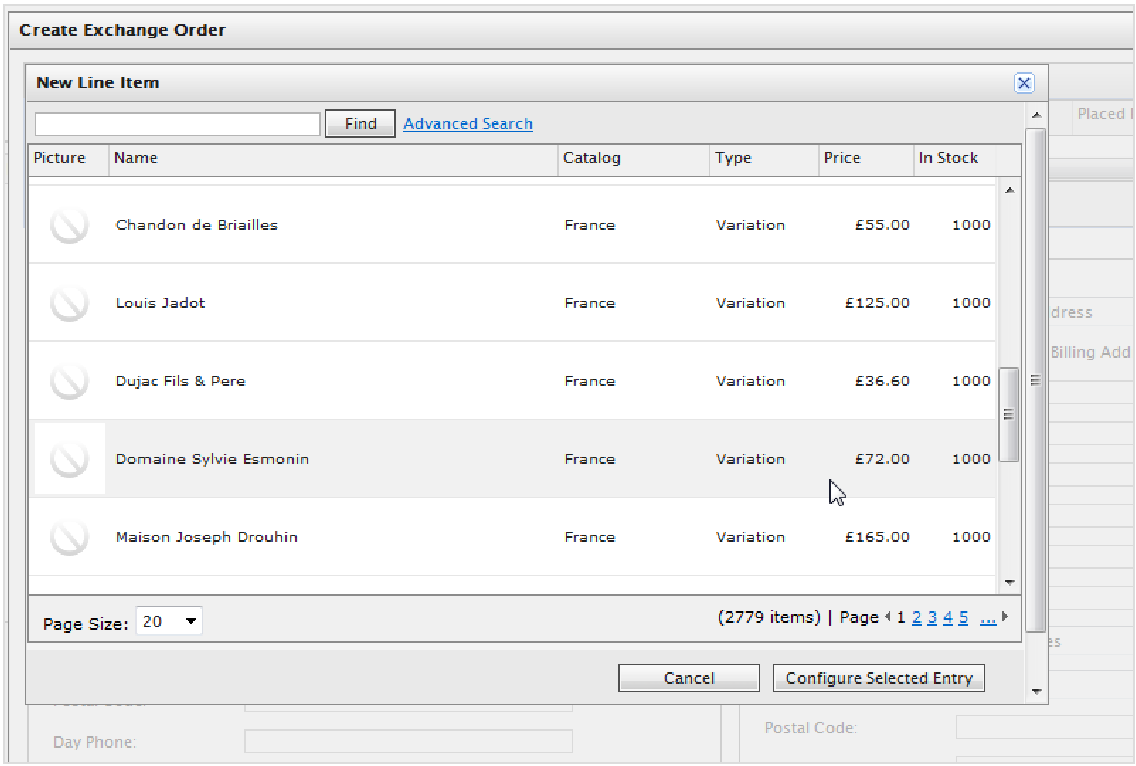
10. Click **OK** to create and process the refund. The status of the purchase order changes to **Completed**.



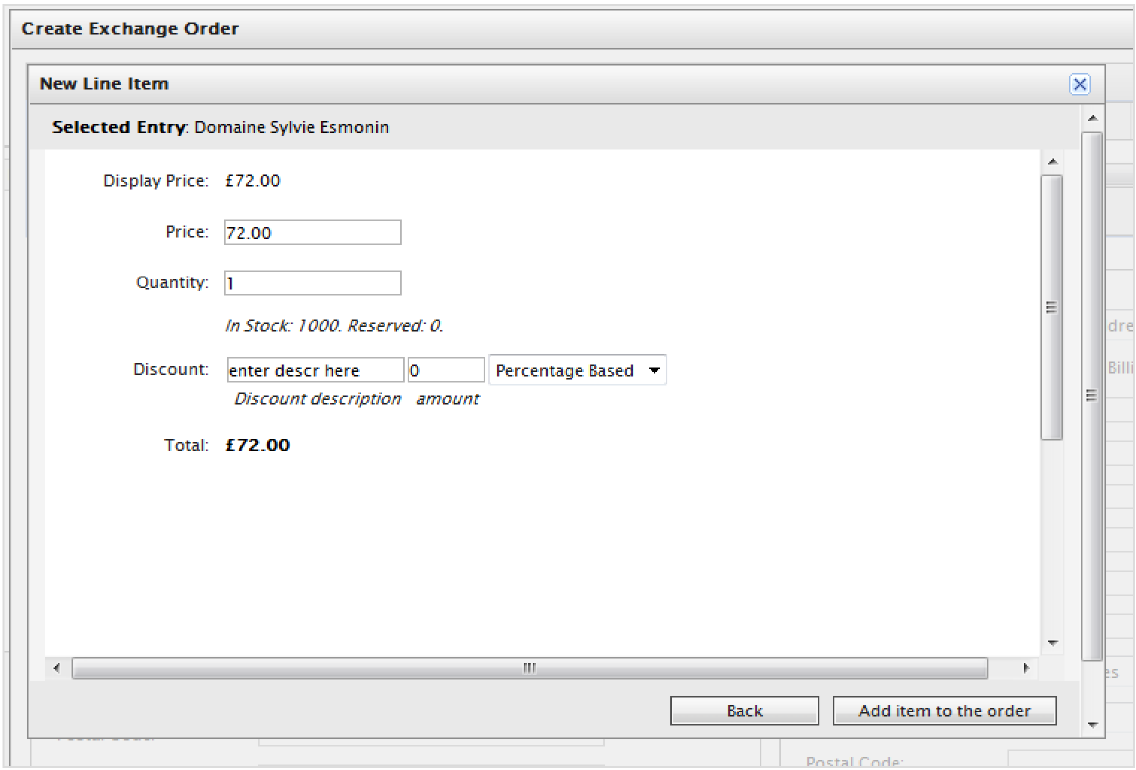
Initiating an exchange order

1. Go to a purchase order, click the **Details** tab, and click **Create Return**.
2. Add the items for exchange.
3. Click the **Returns** tab and click **Acknowledge Receipt Items**.
4. Click **Create Exchange**. The **Create Exchange Order** form appears.
5. Click **New Item.**

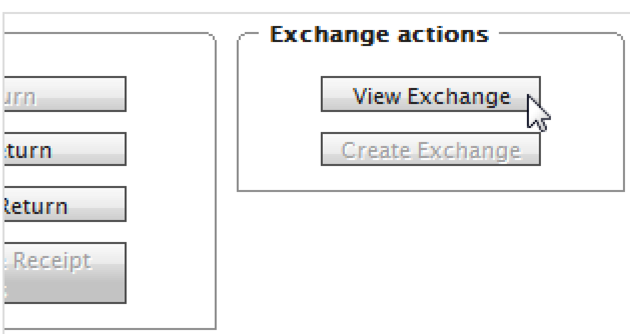
6. Select the item to be exchanged by clicking **Configure Selected Entry**.



You can adjust the price, quantity, and applicable discount. Next, click **Add item to the order** to add the item to the exchange order.

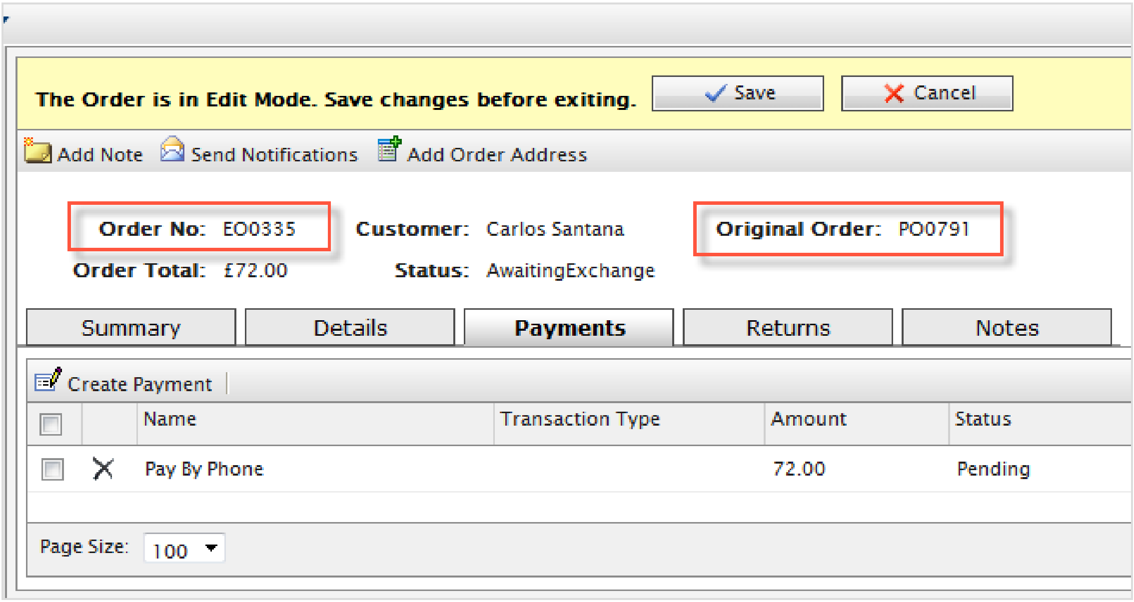


7. Enter a shipping and billing address.
8. Select the shipping method for the exchange order.
9. Click **Recalculate** to adjust the Summary total.
10. Click **OK**.
11. After you create an exchange order (EO), click **View Exchange** to view its details. (An EO is similar to a PO.)

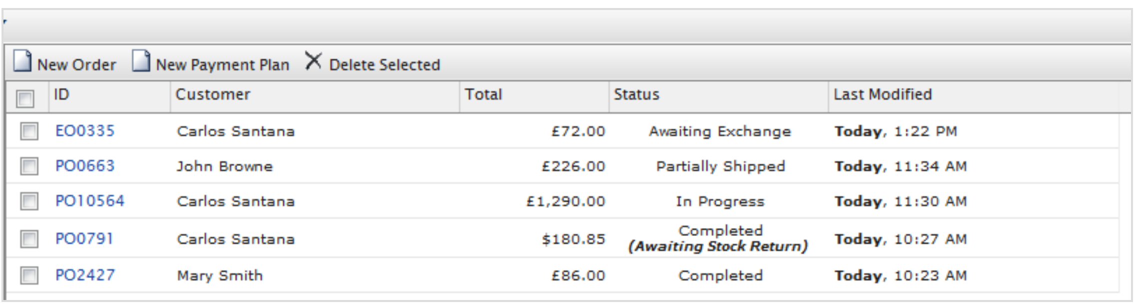


12. Click the **Payments** tab to add a payment to the exchange order.
13. Select a payment method for processing the EO. You can adjust the amount if needed (the default value is based on the item cost plus shipping). The exchange

order enters **Edit Mode**.



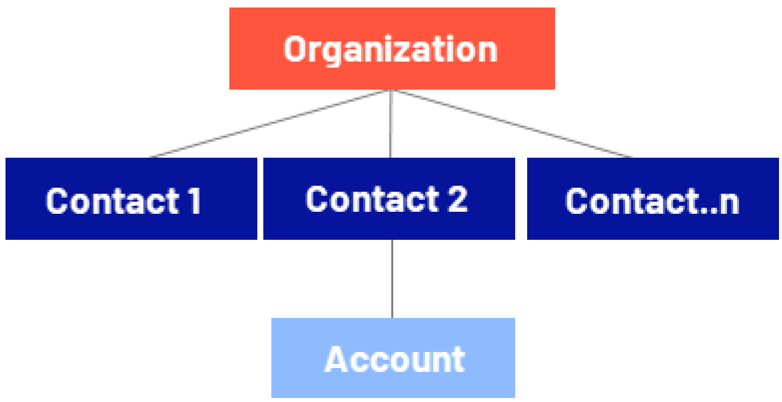
14. Click **Save** to process the payment and the order. The payment Transaction Type changes to **Authorization**. In the **Order List**, there is an exchange order with prefix EO instead of PO, and with a status of **Awaiting Exchange**.



15. Go to the original purchase order and click the **Returns** tab.
16. Click **Complete Return** to enable the Customer Service Representative (CSR) to release the EO shipment. After you release shipment, the CSR repeats the same process as shipping a purchase order.

Customers

The **Customer Management** system in Episerver Commerce is based on contacts and accounts. A contact is a website visitor who registers an account on the front-end site. You can use **organizations** to manage contacts in structures appropriate for your e-commerce business.



Organizations

Create an organization hierarchy by creating parent-child relationships among organizations. For example, you can create a hierarchy of organizations, such as *Administration* > *EU Headquarters* > *EU Management*. You then may associate contacts with the appropriate level of the organization hierarchy. You can set permissions to determine which users can view organizations in the hierarchy.

The same principle applies to creating customer group hierarchies. For example, you have a customers organization with sub-organizations of *Gold*, *Silver*, and *Bronze* levels of customer groups. You can leverage the customer groups to display different prices for each group. See Organizations.

Contacts

When a visitor registers on a site's front-end (for example, to make a purchase), a contact and account are automatically created. You can manage contacts within customer groups and organizations, to which you can apply specific pricing and personalization. See Contacts.

> Note: The default implementation of Episerver Commerce supports anonymous shopping. This means that customers are not required to create an account to purchase. Anonymous customers are not available as contacts.

Organizations

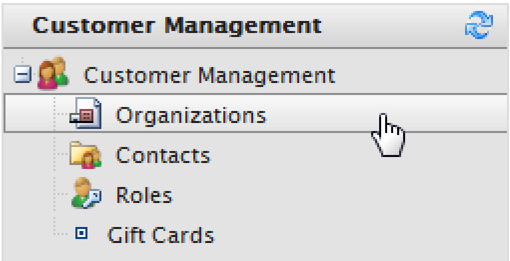
Under **Organizations**, you can create new organizations. Categorize organizations into different types, such as *regional branches* and *departments*, and also business categories, such as *Computer and Electronics* or *Clothing and Accessories*.

You can assign an organization to a customer group, to which you can apply specific pricing and personalization.

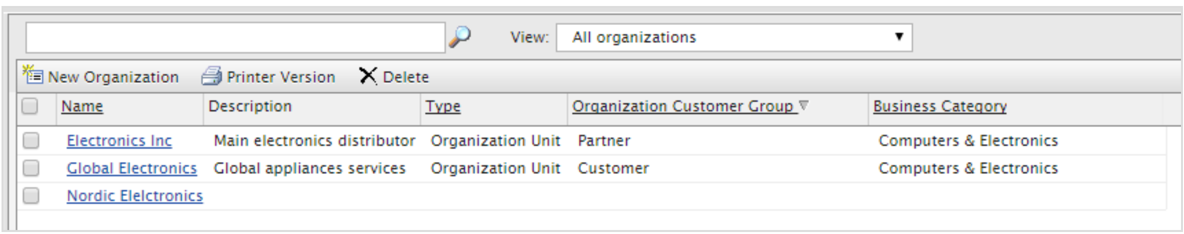
You can structure an organization as a tree, with sub-units and different permissions assigned to each branch. For example, you can set up your company as a parent-level organization while setting up departments, such as *Sales & Marketing*, *IT/Development*, and *Operations*, as organization units. Within this scenario, you can restrict the access of users in each department to appropriate systems, screens, and functionality within Commerce Manager.

Browsing organizations

To browse organizations, go to **Commerce Manager** > **Customer Management** > **Organization**.



The **Organization List** page appears.

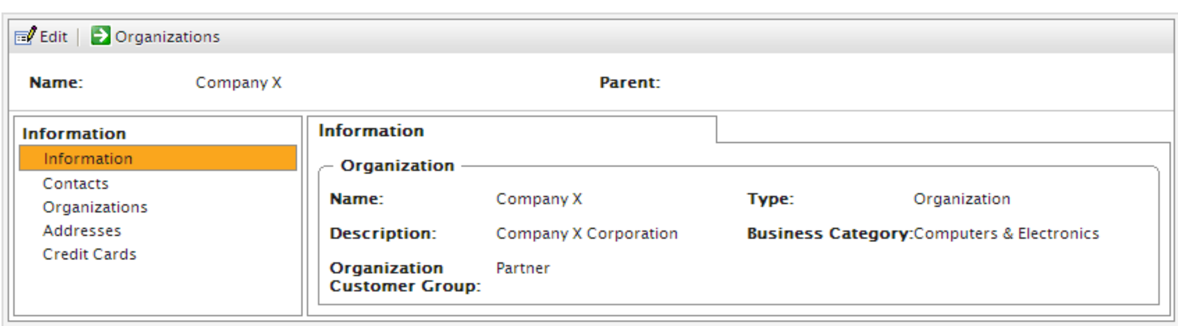


This view provides the following information:

- **Name**. Name of the organization.
- **Description**. Additional details about the organization.
- **Type.** Organization or Organization Unit.
- **Business Category**. Category under which the organization falls.

Viewing organization details

Select an organization in the list to view its type, related contacts, organizations (parent/sub), addresses, and credit cards.



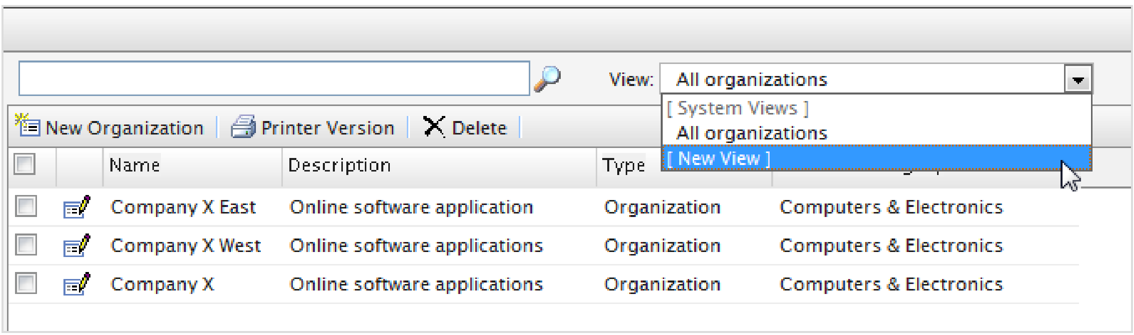
Searching for an organization

Use the search field on top of the **Organization List** to find organizations by name.

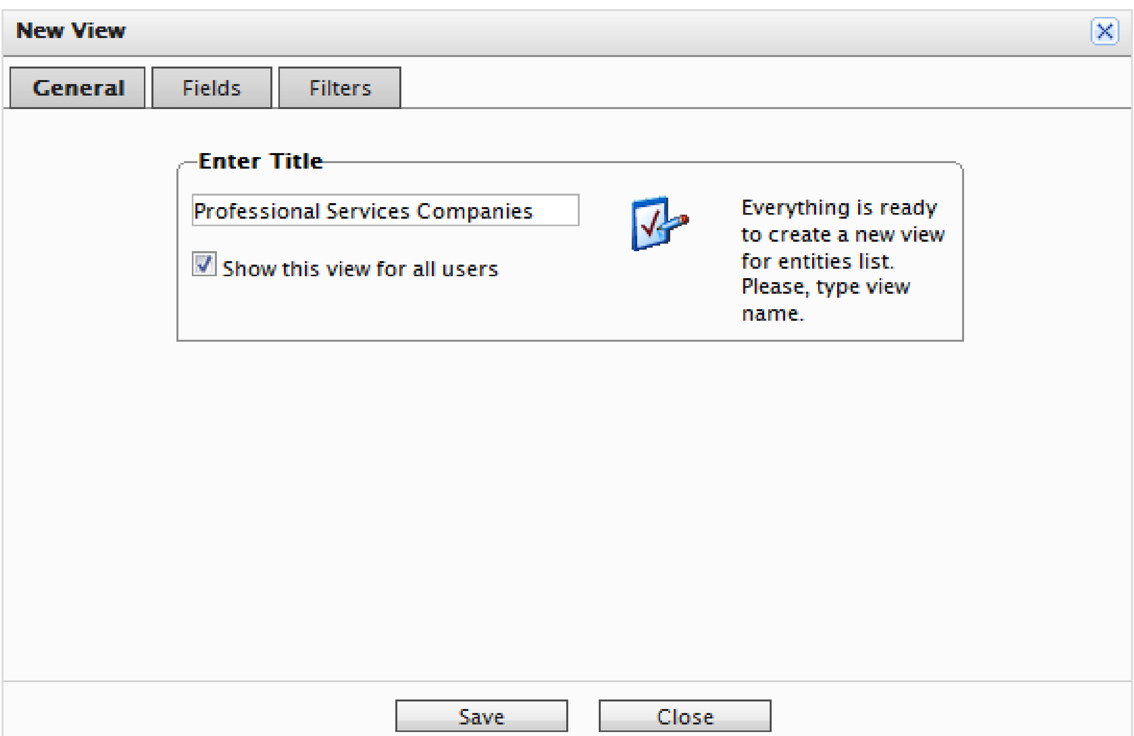
Customizing views for browsing organizations

As an organization list gets longer, you can create and customize views to filter it. Define columns to be displayed for the view, and filters to be applied.

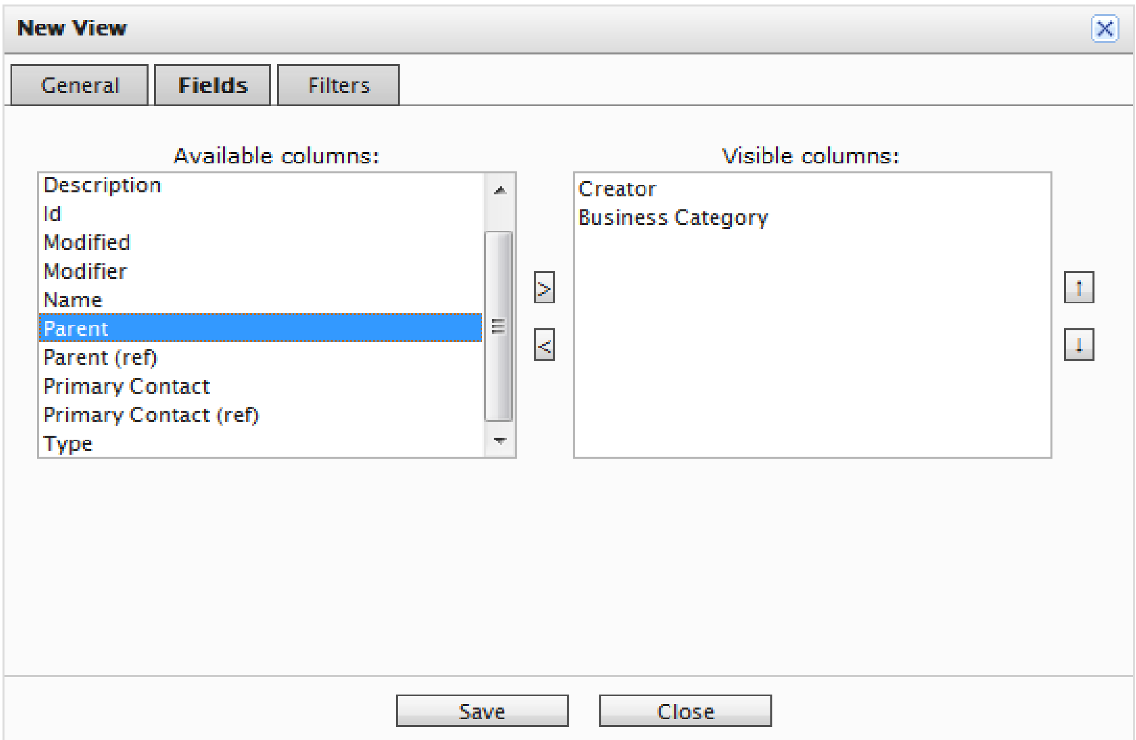
1. Select **View** > **[New View]**. The **New View** dialog box appears.



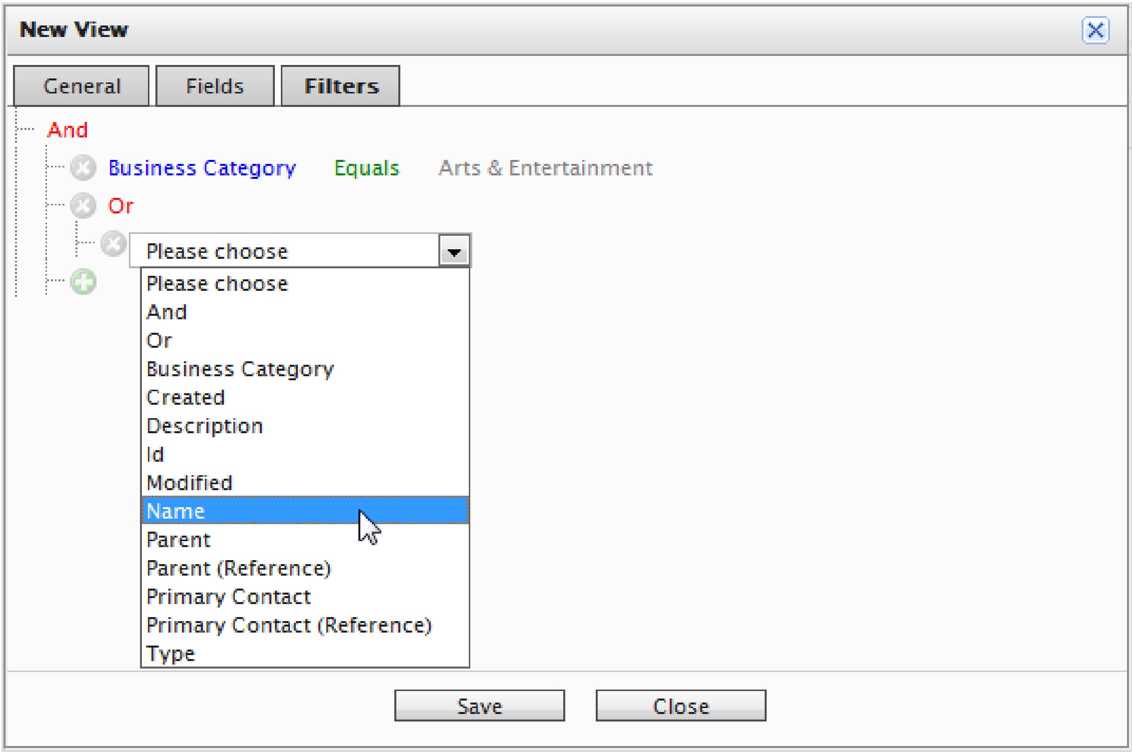
2. On the **General** tab, enter a **Title** for the custom view. Click **Show this view for all users** if you want other users to see this view.



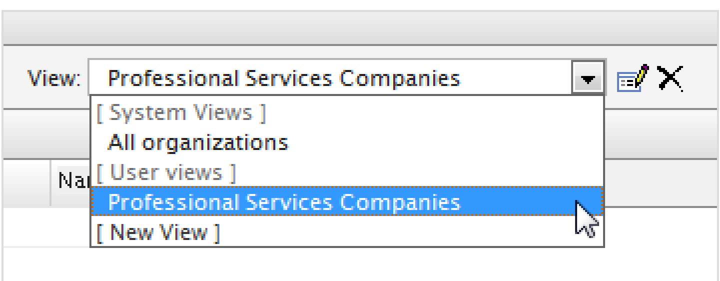
3. On the **Fields** tab, select columns to appear in the custom view. To do so, select an available column then click **Right Arrow** to move it to the **Visible columns** list. To deselect, select a visible column and click **Left Arrow**. To re-order the list, click **Up** and **Down** arrows.



4. On the **Filters** tab, set the view filters. Click **+** to add a filter.

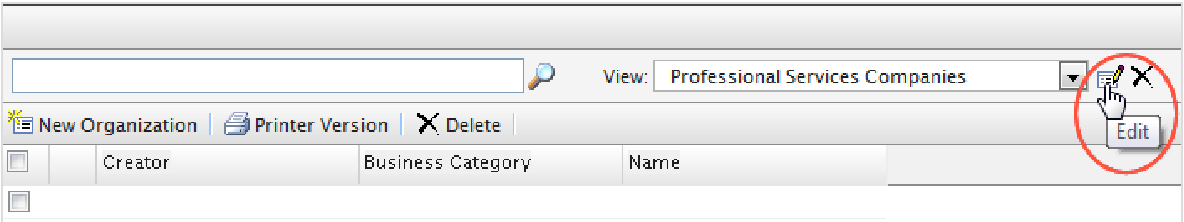


5. Click **Save** to return to the **Organization List** screen. The new view appears in the **View** drop-down list.



Editing and deleting views

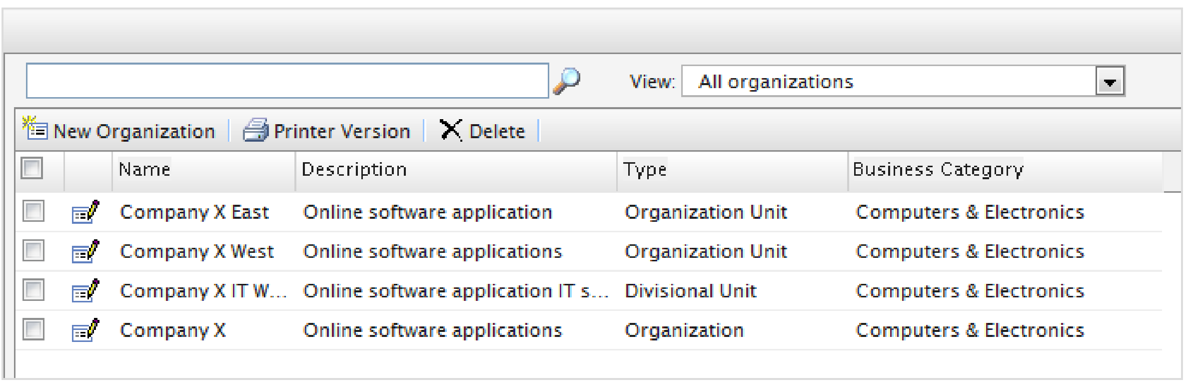
To edit an existing view, select it from the drop-down list and click **Edit**. The **View Editing** dialog box appears, and you can edit all properties.



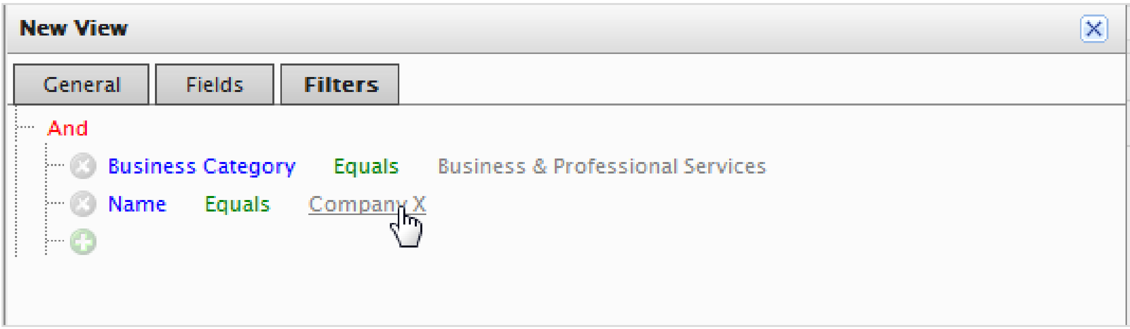
To **delete** a custom view, click **X**.

Customized view example

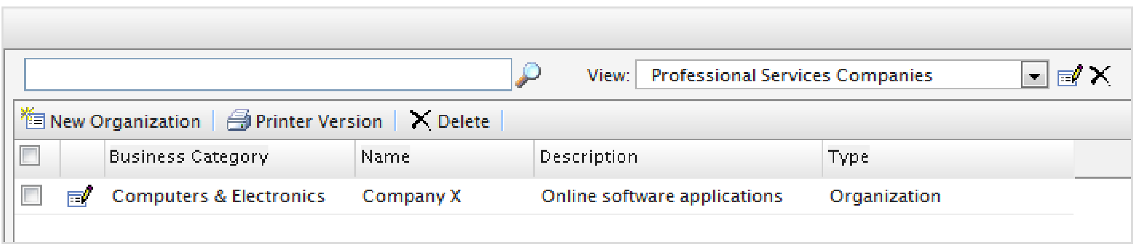
The following example creates a view that shows only organizations that match a business category and organization name. Create a filter condition that displays organizations with a **Business Category** that equals *Business & Professional Services*, and an **Organization Name** that equals *Company X*.



1. In **New View** > **Filters**, click **Add** (**+**) and, from the drop-down list, click **Business Category**. Two fields, which default to **Equals** and **Arts & Entertainment**, appear.
   a. Click **Equals** and a drop-down list appears. Keep the field as "Equals".
   b. Select the field to its right and select a **Business Category** name (such as **Business and Professional Services**).
2. Click the next **Add** (**+**) and click **Name** to add another filter so that the organization matches **Business Category** and **Name**.
   a. Click **Equals**.
   b. In the **Text** field, enter the organization name.



3. Click **Save**.
4. To apply the view, select it from the drop-down list. Your organization list reflects the columns and filters you applied in the **Fields** tab.

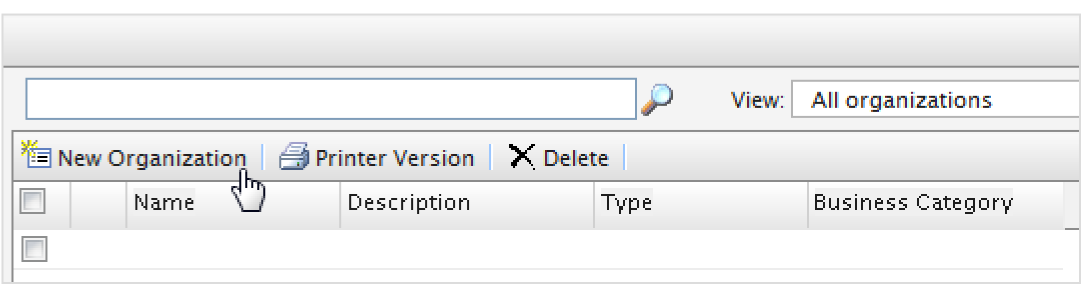


Printing a list of organizations

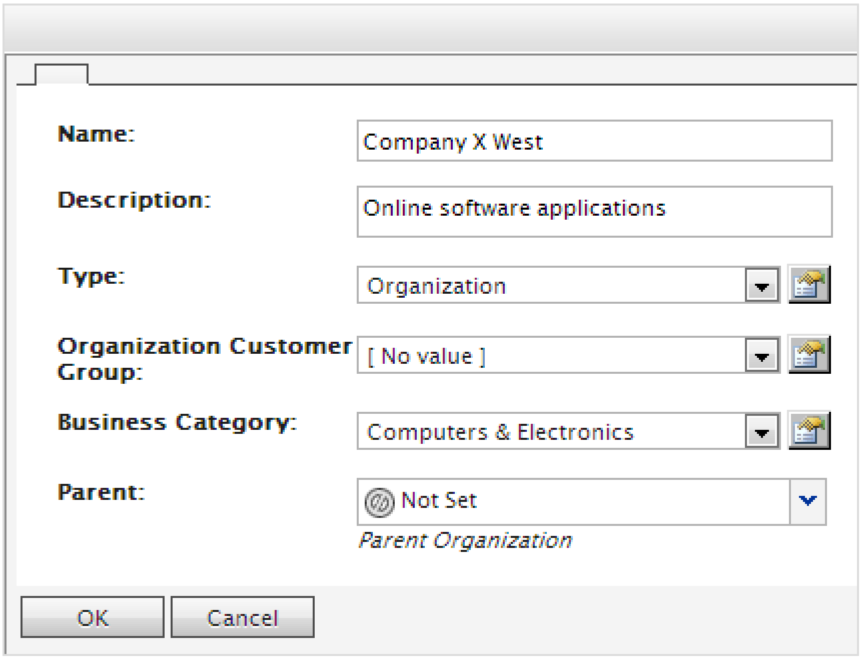
Click **Printer Version** to generate a list of organizations. A new window renders a table suitable for printing.

Creating or editing an organization

1. Go to **Commerce Manager** > **Customer Management** and **Organizations**. The **Organizations** page lists existing organizations.
2. Click **New Organization** or any existing organization. A screen appears.

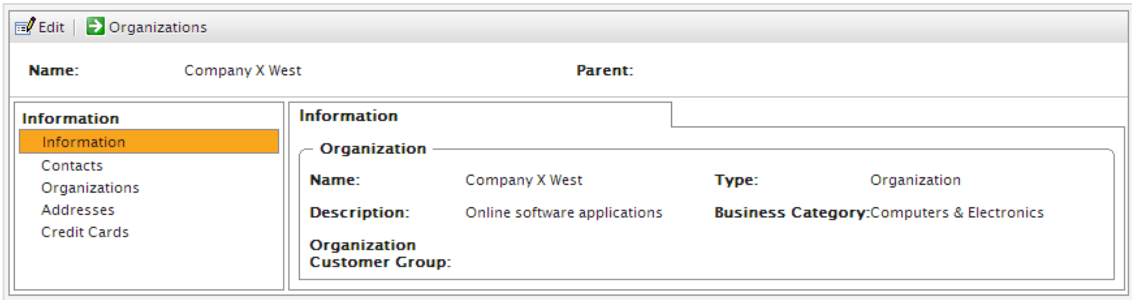


3. Enter data for the new organization.



- **Name**. Enter the organization name. (This is the only required field.)
- **Description**. Enter details about the organization.
- **Type**. Assign a type to the organization. If the organization is a parent organization, click **Organization**. If the organization is a sub-organization, click **Organization Unit**. To add more types to the drop-down list, click the icon.
- **Organization Customer Group**. Select a customer group to assign for the organization, which lets you apply pricing, discounts, and personalization of content to this group.
- **Business Category**. Assign a category to the organization. To add more categories, click the icon.
- **Parent**. You can assign a parent organization to an organization. If the organization you are creating is a sub-unit (child) of a larger organization, select the parent in the drop-down list. If the Organization is not listed on the drop-down list, click **More...**

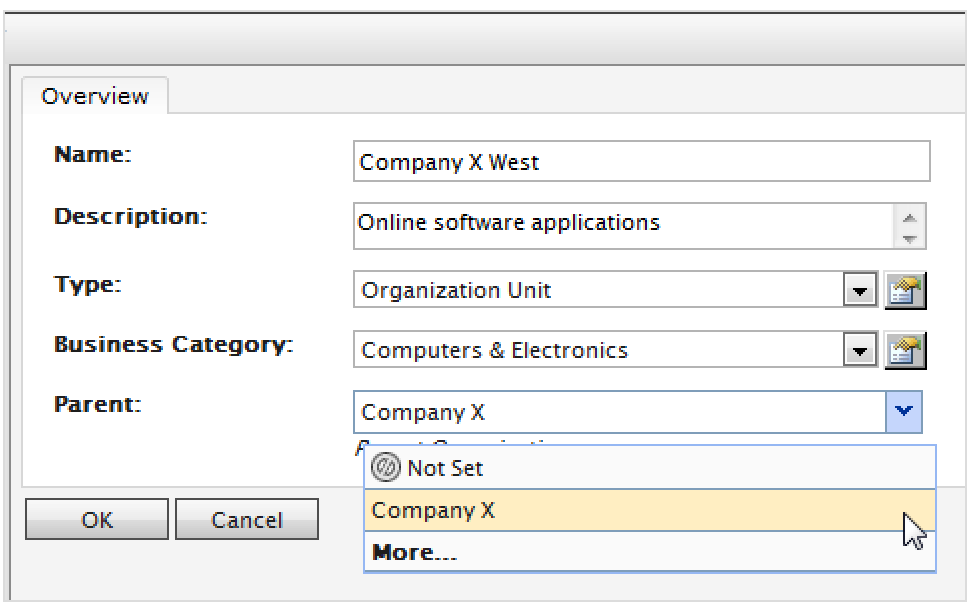
4. Click **OK** to save the organization. The **Organization Info** window appears, where you can view **Information** about the organization you just created. You can also see associated **Contracts**, **Organizations**, **Addresses**, and **Credit Cards** that Episerver provides by default. Click **Edit** to edit the organization. Click **Organizations** to return to the organization List.



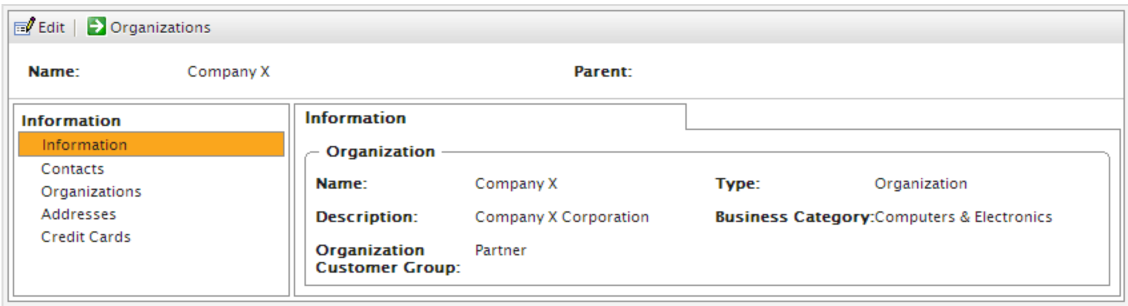
Creating an organizational hierarchy

You can create an organization hierarchy by assigning a parent organization to a child organization and then another organization to the child. You can set permissions to determine which users can view which organizations in the hierarchy. In the following example, *Company X* is the parent organization and *Company X West* is the organization unit.

1. Go to Organizations and click **New Organization**.
2. Enter data for the organization (see previous section).
3. Under the **Parent** option, assign the desired parent organization ("Company X"). If you do not see the organization on the drop-down list, click **More...**



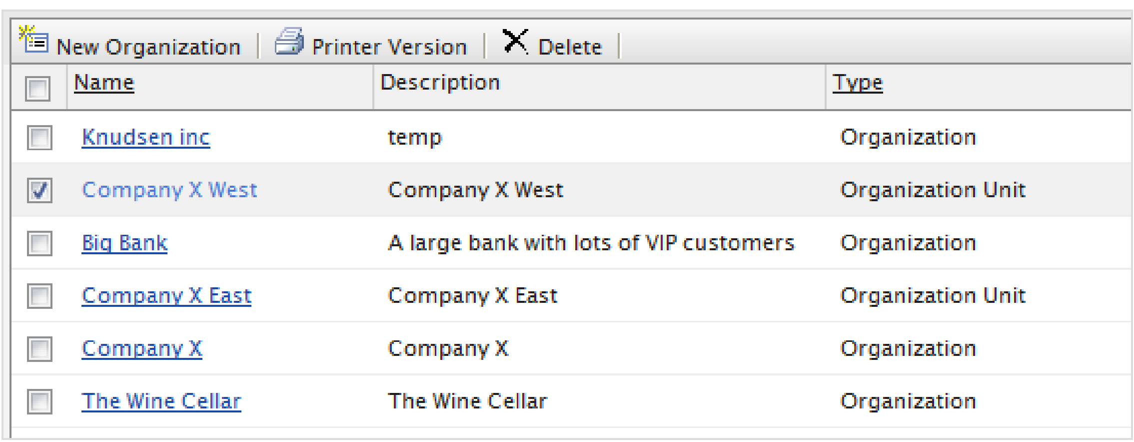
4. Click **OK** to save the organization. In the **Organization Info** page, the organization unit (*Company X West*) becomes the child to the Organization (*Company X*) you selected.



5. Repeat the above steps to create additional organization units for the parent organization.

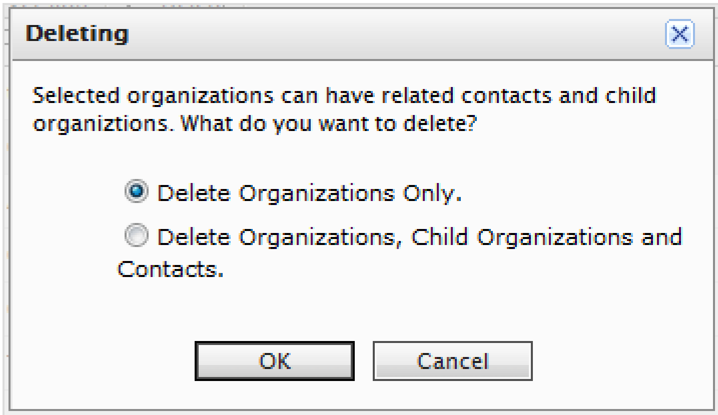
Deleting an organization

1. Go to **Commerce Manager** > **Customer Management** > **Organizations**. The **Organizations** page appears.
2. Select the organization to delete and click **Delete**. A confirmation message appears.



Name	Description	Type
Knudsen inc	temp	Organization
Company X West	Company X West	Organization Unit
Big Bank	A large bank with lots of VIP customers	Organization
Company X East	Company X East	Organization Unit
Company X	Company X	Organization
The Wine Cellar	The Wine Cellar	Organization

3. Select **Delete Organizations Only** or **Delete Organizations, Child Organizations and Contacts** and click **OK** to complete the deletion.



You can delete organizations with children without deleting the child organizations and contacts with no repercussions. This leaves the contacts and child organizations as orphans. You can later reassign them, as described in Creating an organization.

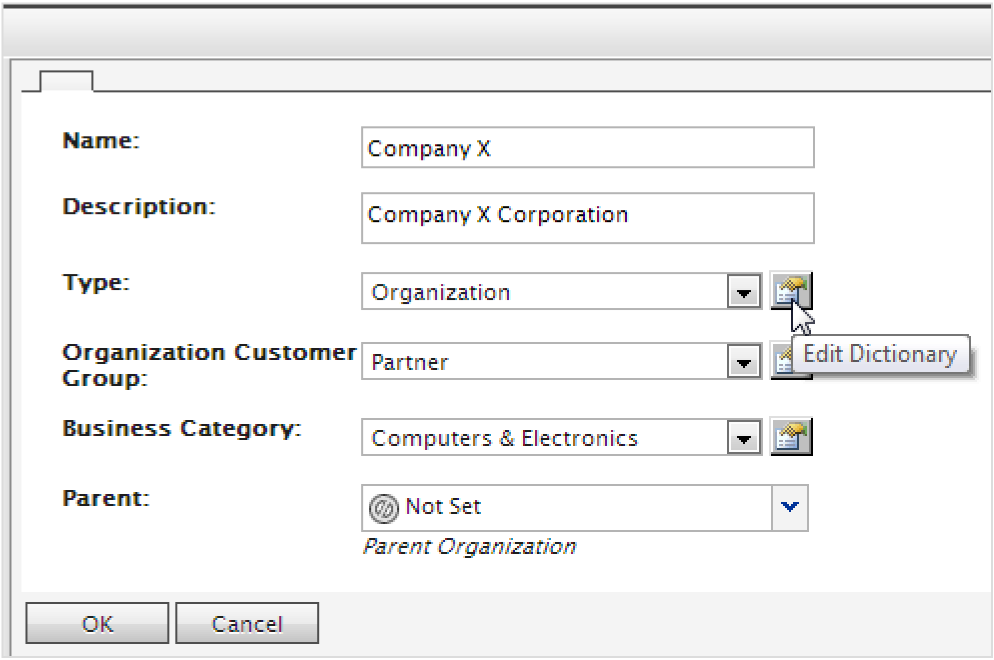
Adding dictionary values for an organization

> **Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

You can create your own organization types, customer groups, and business categories. For example, you can create a customer group called *Partner*, and a business category can be an industry branch called *Automotive* or *Food & Dining*. This type of data is managed in dictionaries. This topic describes how to add dictionary values.

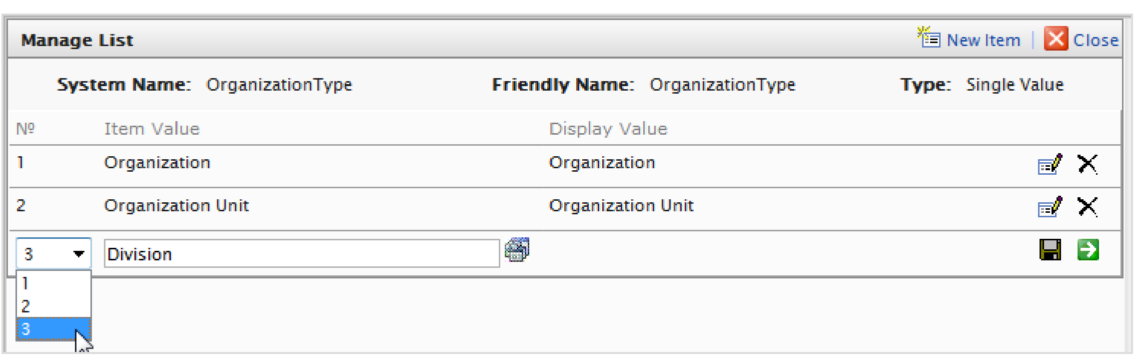
1. In **Commerce Manager** > **Customer Management**, open the **Organization Edit** page by creating a new organization or editing an existing one.

2. Click **Edit Dictionary** next to the **Type** drop-down list.



3. On the dialog box that appears, click **Edit** to modify an existing organization type dictionary. To add a new item to the dictionary, click **New Item**.

4. Select the order of the item from the drop-down list on the left. Enter a name for the item on the field next to the drop-down list.



5. Click **Save**.
6. Click **Close**. You can select the dictionary item in the **Type** drop-down list.

To delete a dictionary item, open the dictionary list and click **Delete** next to the item.

> Note: If you change the number to a position higher in the list, the list is not automatically reordered. You must manually edit the entire list. However, having multiple copies of the same numerical value does not affect the system. So, you can use the numbers as a ranking system or devise your own internal numbering method.

Creating, editing and deleting business categories

Episerver provides a list of categories that you can assign to an organization. You can add categories the same way you add organization types.

1. Click **Edit Dictionary** next to the **Business Category** drop-down list.
2. On the resulting dialog box, click **Edit** to modify existing business categories. Click **New Item** to add a new item to the dictionary. Click **Delete** to delete an item from the list.
3. Select the order of the item from the drop-down list on the left and enter a **name** for the item on the field next to the drop-down list.
4. Click **Save**. You can select the new business category in the **Business Category** drop-down list.

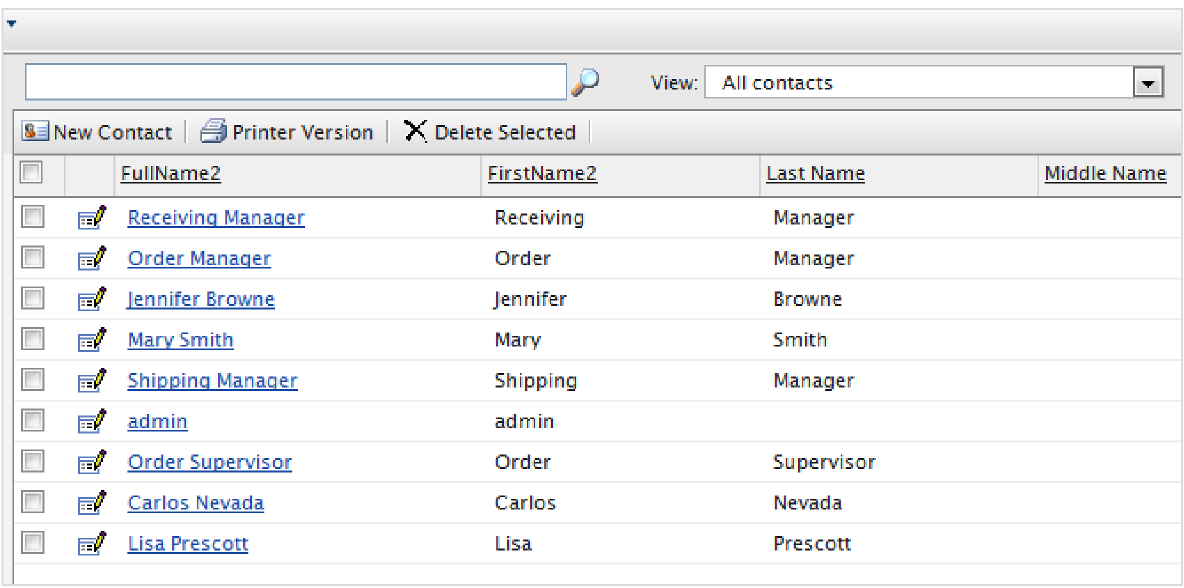
Contacts

A contact and a related account are created automatically when a visitor registers on the public front-end site. You can also manually create a contact from Commerce Manager.

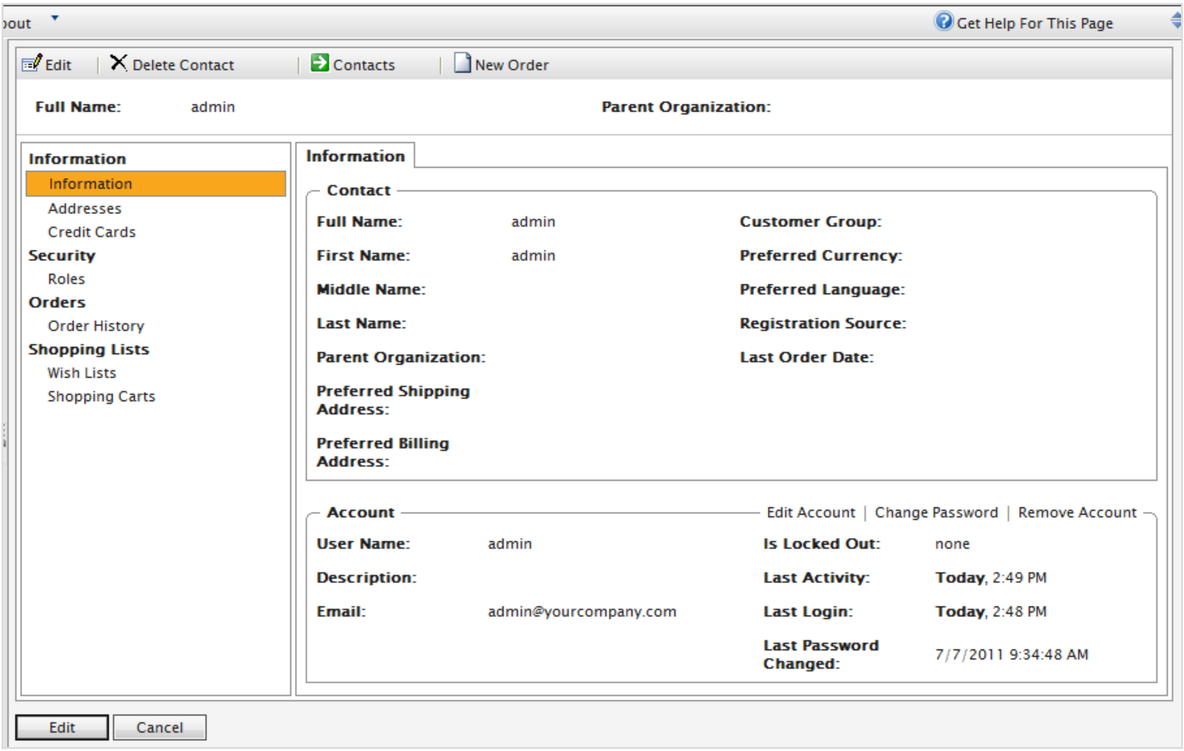
You can assign a contact to customer groups and **organization customer groups**. A customer group is assigned to an organization, which may determine eligibility for prices that are different from other users. A contact in an organization is a member of that organization's customer group, even if the contact is assigned individually to a different customer group.

Browsing contacts

To browse contacts, go to **Commerce Manager** > **Customer Management** > **Contacts**.



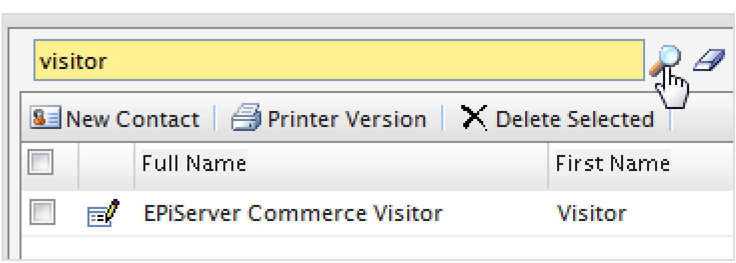
Select a contact to see detailed information about the contact, such as addresses, order history, and so on.



Note: You can add objects or metadata to the default View Form via Business Foundation.

Searching for a contact

On the **Contact Info** page, use the search form to search for a contact. Contacts that match the search criteria appear on the list.

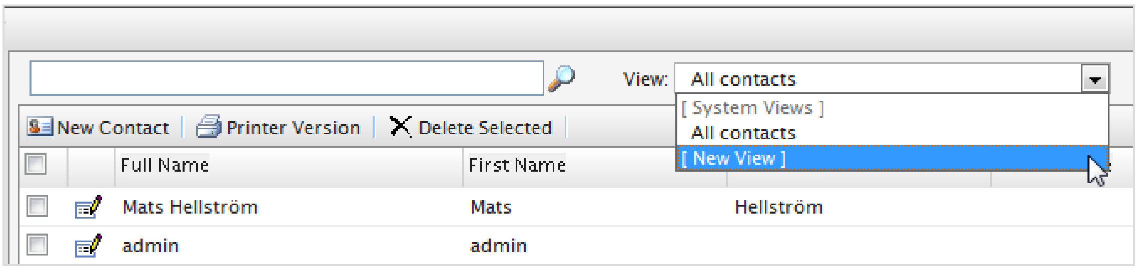


To clear the search and revert back to show all contacts, click **Reset** (eraser).

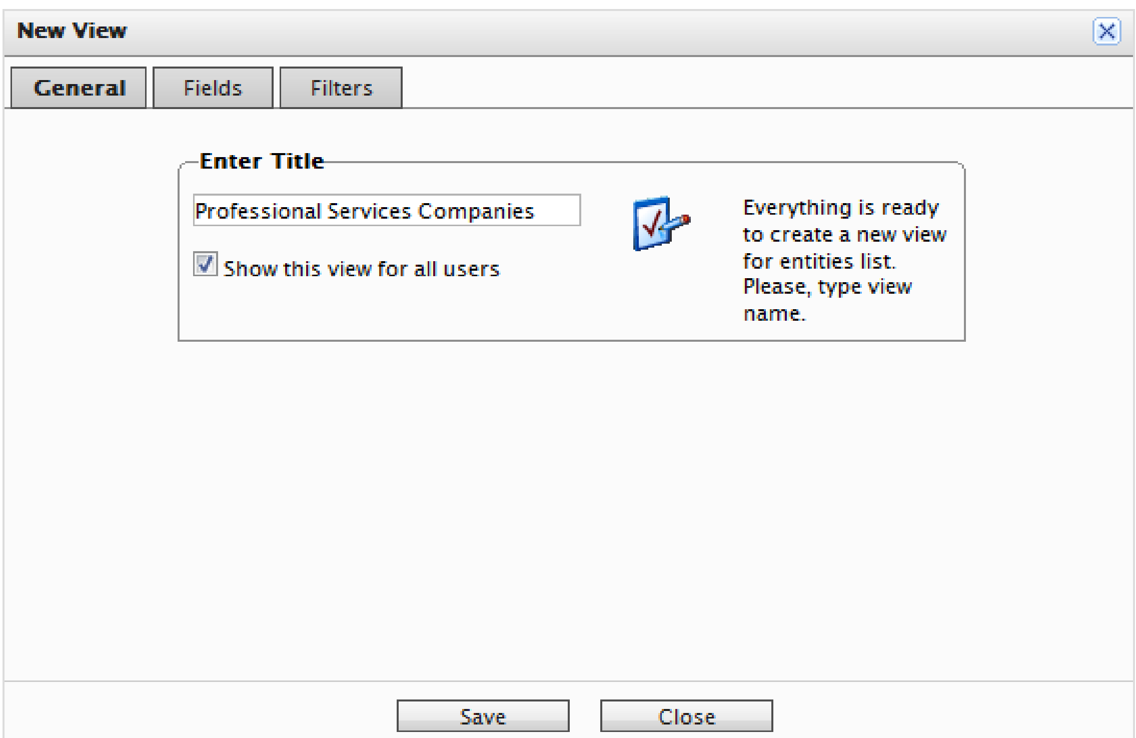
Customizing views for browsing contacts

As an contact list gets longer, you can create and customize views to filter the list. Define columns to be displayed for the view, and the filters to be applied when selecting what to include in the view.

1. Select **View** > **[New View]**. The **New View** dialog box appears.

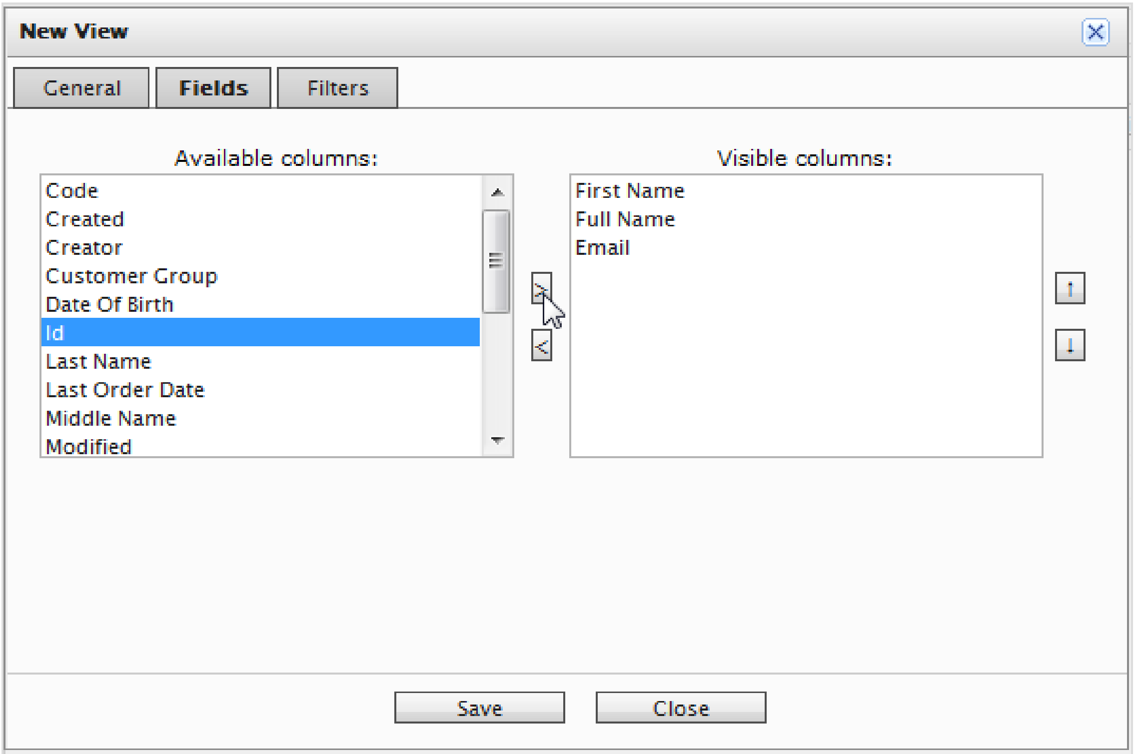


2. On the **General** tab, enter a **Title** for the custom view. Click **Show this view for all users** if you want other users to see this custom view.

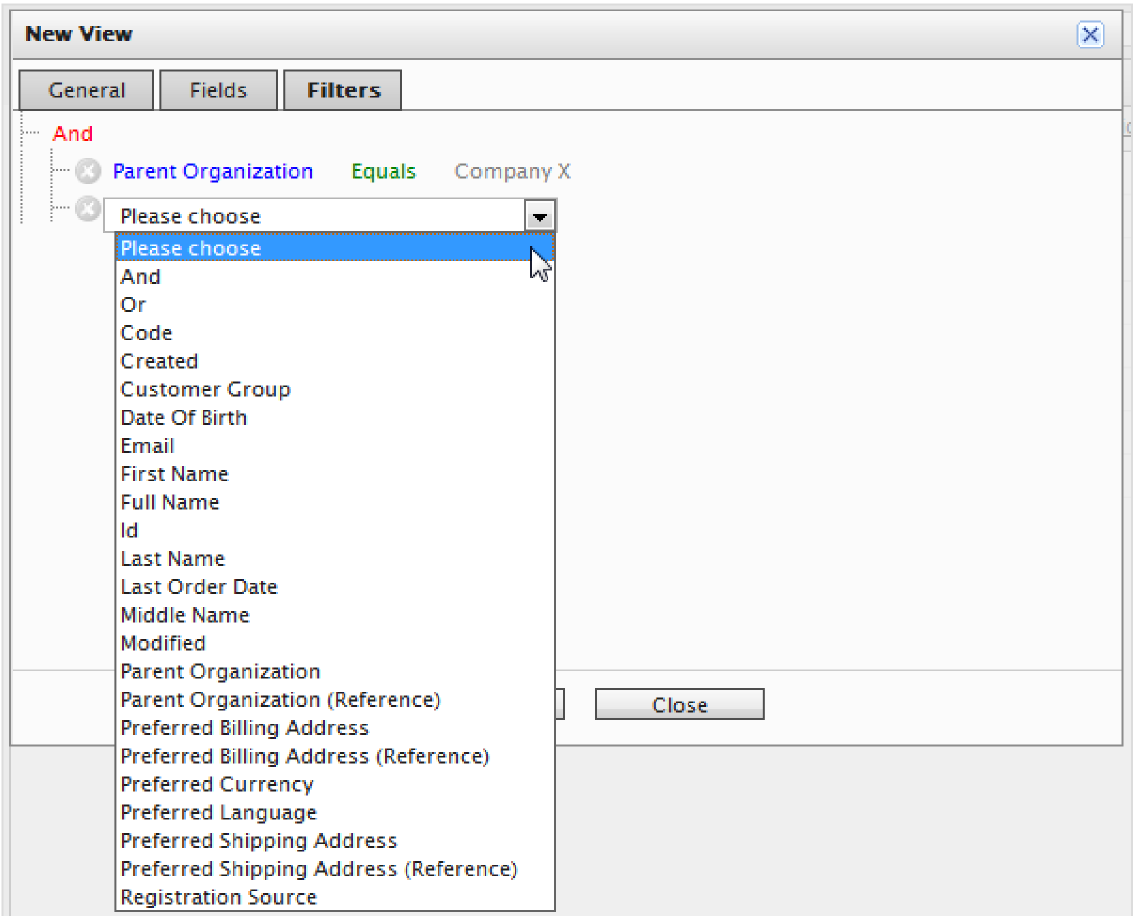


3. On the **Fields** tab, select columns to appear in the custom view. Select an available column then click **Right Arrow** to move it to the **Visible columns** list. To deselect a

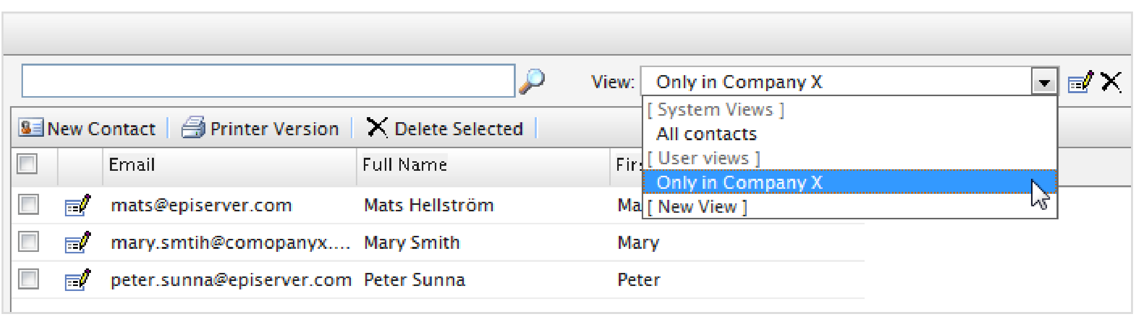
column, select one and click **Left Arrow**. To re-order the list, click **Up** and **Down** arrows.



4. On the **Filters** tab, set the view filters. Click **+** to add another filter.

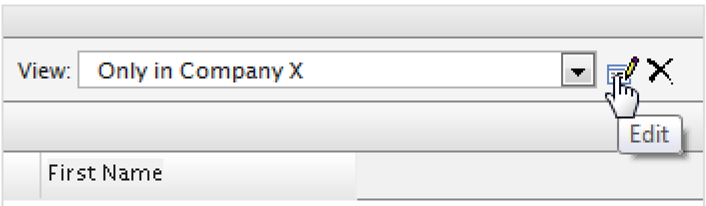


5. Click **Save** to return to the **Contacts List** screen. The new view appears in the **View** drop-down list.



Editing and deleting views

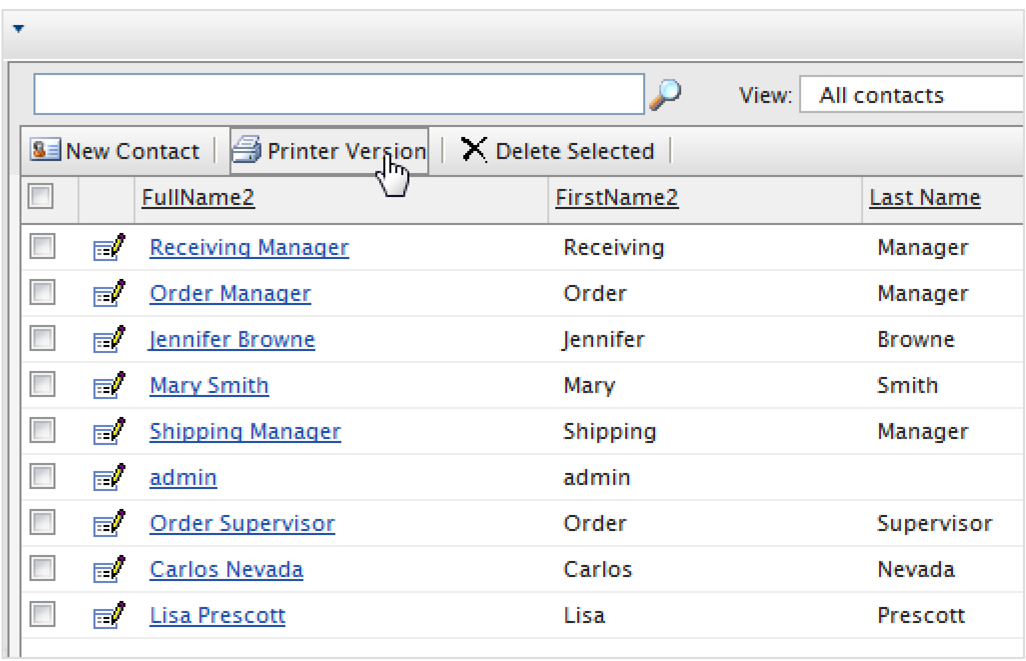
To edit an existing view, select the view from the drop-down list and click **Edit**. The **View Editing** dialog box appears, and you can edit all properties.



To **delete** a custom View, click **X**.

Printing a list of contacts

Click **Printer Version** to generate a table of contacts.



Contact

Full Name	First Name	Last Name	Middle Name	Last Order Date	Customer Group
Receiving Manager	Receiving	Manager			
Order Manager	Order	Manager			
Jennifer Browne	Jennifer	Browne			
Mary Smith	Mary	Smith			
Shipping Manager	Shipping	Manager			
admin	admin				
Order Supervisor	Order	Supervisor			
Carlos Nevada	Carlos	Nevada			
Lisa Prescott	Lisa	Prescott			

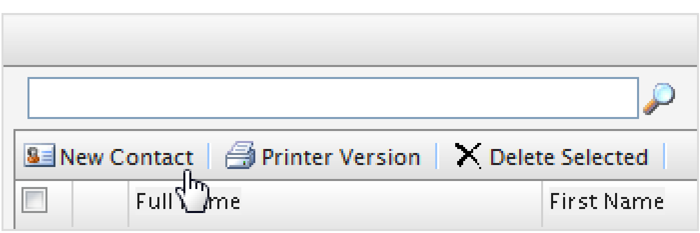
Creating a contact with an account

> Note: Creating **system users** and assigning access rights (roles) to work with Episerver CMS and Episerver Commerce is done from the **CMS admin view**. See Access rights for Episerver Commerce. The procedure described here relates to website visitors and shopping customers.

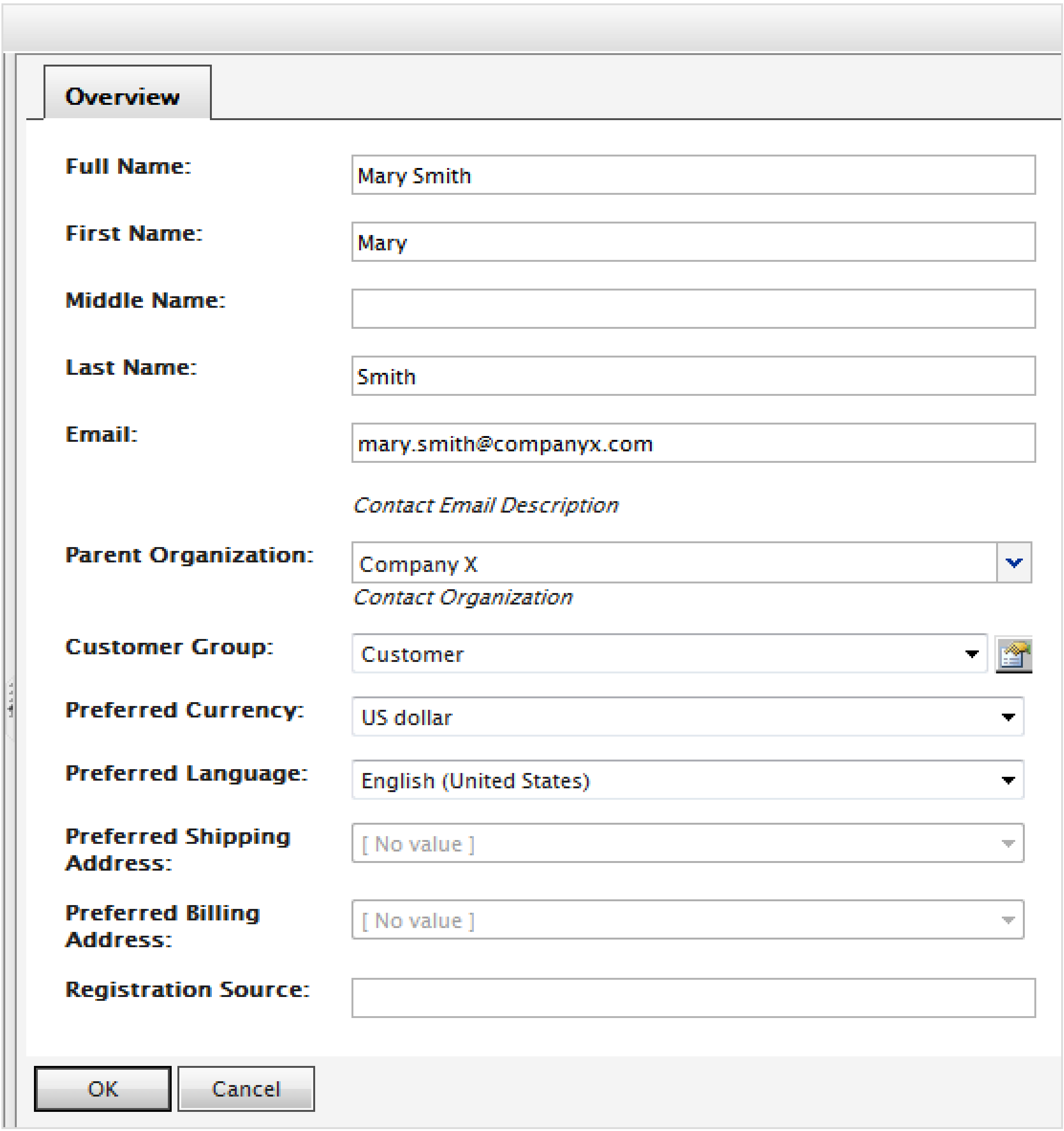
The following procedure creates a contact with an account.

> Note: The Customer Information screen also lets you update some customer information. However, that screen does not let you create an account for a customer.

1. In **Commerce Manager** > **Customer Management**, click **New Contact** on the **Contact List** page. The **Contact Edit** page appears.



2. Enter information about the contact.

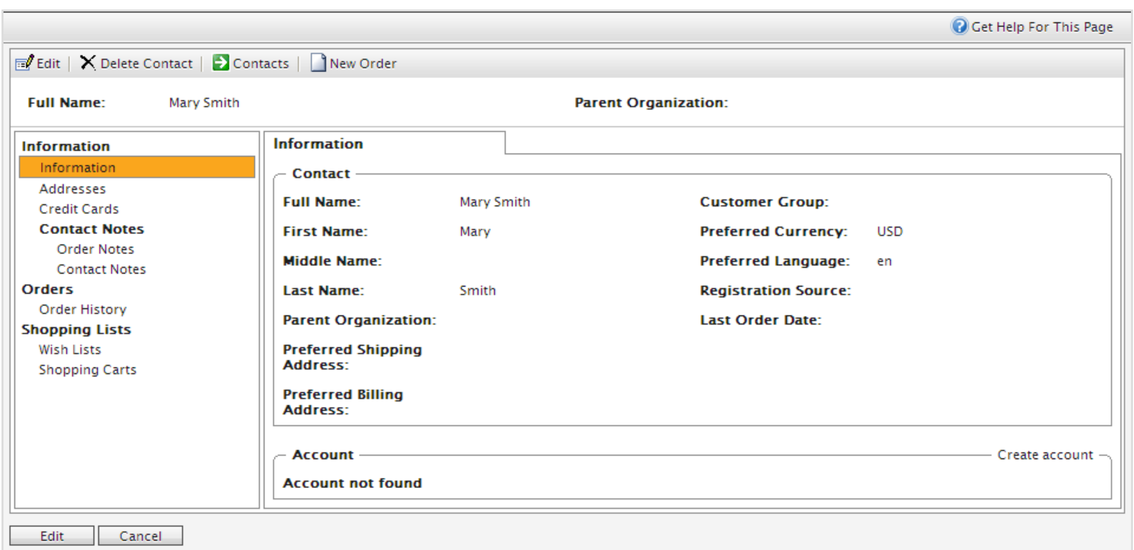


- **Full Name**. Required. Enter the contact's full name.
- **First Name**. Required. Enter the contact's first name.
- **Middle Name**. Optional. Enter the contact middle name.
- **Last Name**. Required. Enter the contact's last name.
- **Email**. Required. Enter the contact's email address.

- **Parent Organization**. Optional. Select a parent organization to which the contact is assigned .
- **Customer Group**. Optional. Select a customer group to which the contact is assigned. You can add customer groups by editing the Customer group dictionaries. Customer groups are useful for targeted Marketing campaigns.
- **Preferred Currency**. Optional. Select a currency for the contact. For example, if the contact is in France, select the Euro currency. You set available currency options in **Administration** > **System Settings** > **Dictionaries** > **Currencies**.
- **Preferred Language**. Optional. Select a language for the contact. You set available languages in **Administration** > **System Settings** > **Dictionaries** > **Languages**.
- **Preferred Shipping Address**. Automatic; related to company accounts.
- **Preferred Billing Address**. Automatic; related to company accounts.
- **Registration Source**. Optional. Enter notes about the contact (such as the website under which the contact is currently registered).

> Note: The **Registration Source** field is automatically filled when a user creates a new account from the public website.

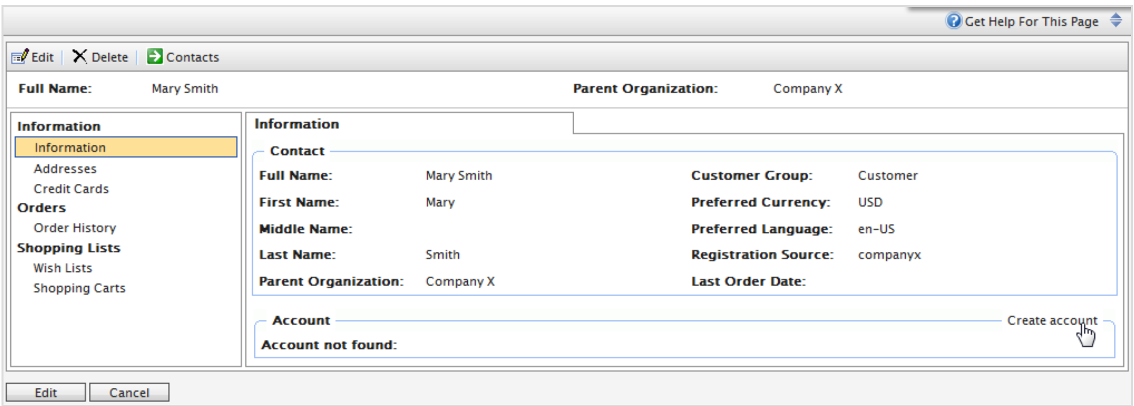
3. Click **OK** to save the contact. The **Contact Information** form appears. To display the Contacts List, click **Contacts** or **Cancel**.



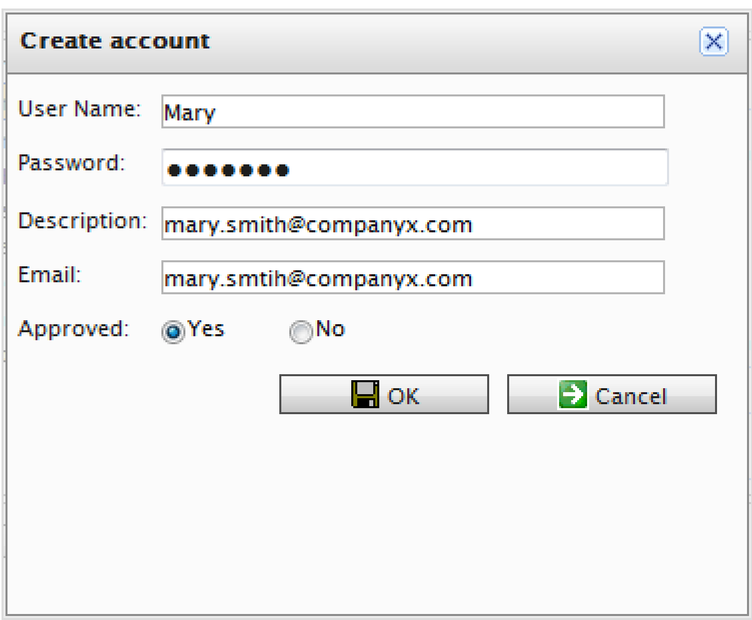
You can enter additional information for the contact, view order history, and add notes for both orders and the contact. You can customize the form using Business foundation.

> **Note:** A customer account is automatically created for a customer who registers from the front-end public website, allowing them to log in and view personalized information. To manually create an account, continue with the procedure.

4. On the **Contact Info** page, click **Create account**. The **Create Account** dialog box appears.



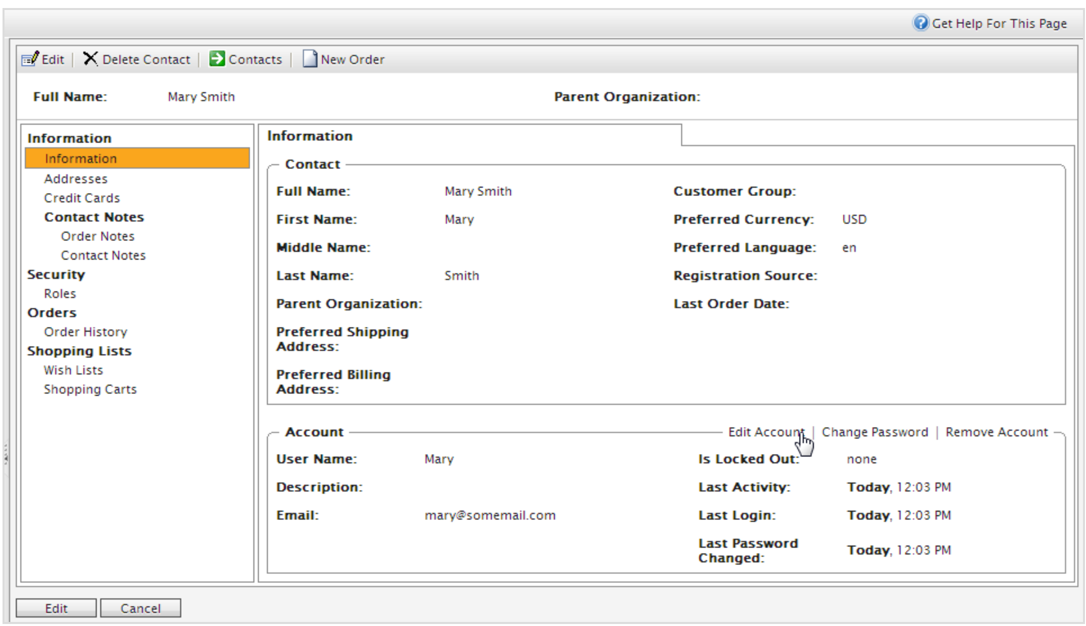
5. Enter data in the **Create account** dialog box.



- **User Name**. Required. Enter a name that may include spaces and special characters.

- **Password**. Required. Enter a password for the account.
- **Description**. Optional. Add information about the contact account.
- **Email**. Enter the contact's email address.
- **Approved**. Click **Yes** to enable. Click **No** to keep the account inactive and inaccessible by the contact.

6. Click **OK** to create the account. User account information appears under the **Account** section of the **Contact Information** form.
    - **Is Locked out**. Last time a user was locked out due to too many failed log in attempts.
    - **Last Activity**. Last time the user logged in or made any changes to the site.
    - **Last Login**. Last time the user logged into his or her account.
    - **Last Password Changed**. Last time the user account password changed.



Editing or deleting a contact and account

Go to **Commerce Manager** > **Customer Management** > **Contacts** to do the following:

- **Edit a contact**. Select the contact in the contact list and click **Edit**. Edit the information and click **OK**.
- **Edit an account**. Select the related contact in the contact list and select the **Edit Account** option in the lower part of the dialog box. Edit the information and click **OK**.

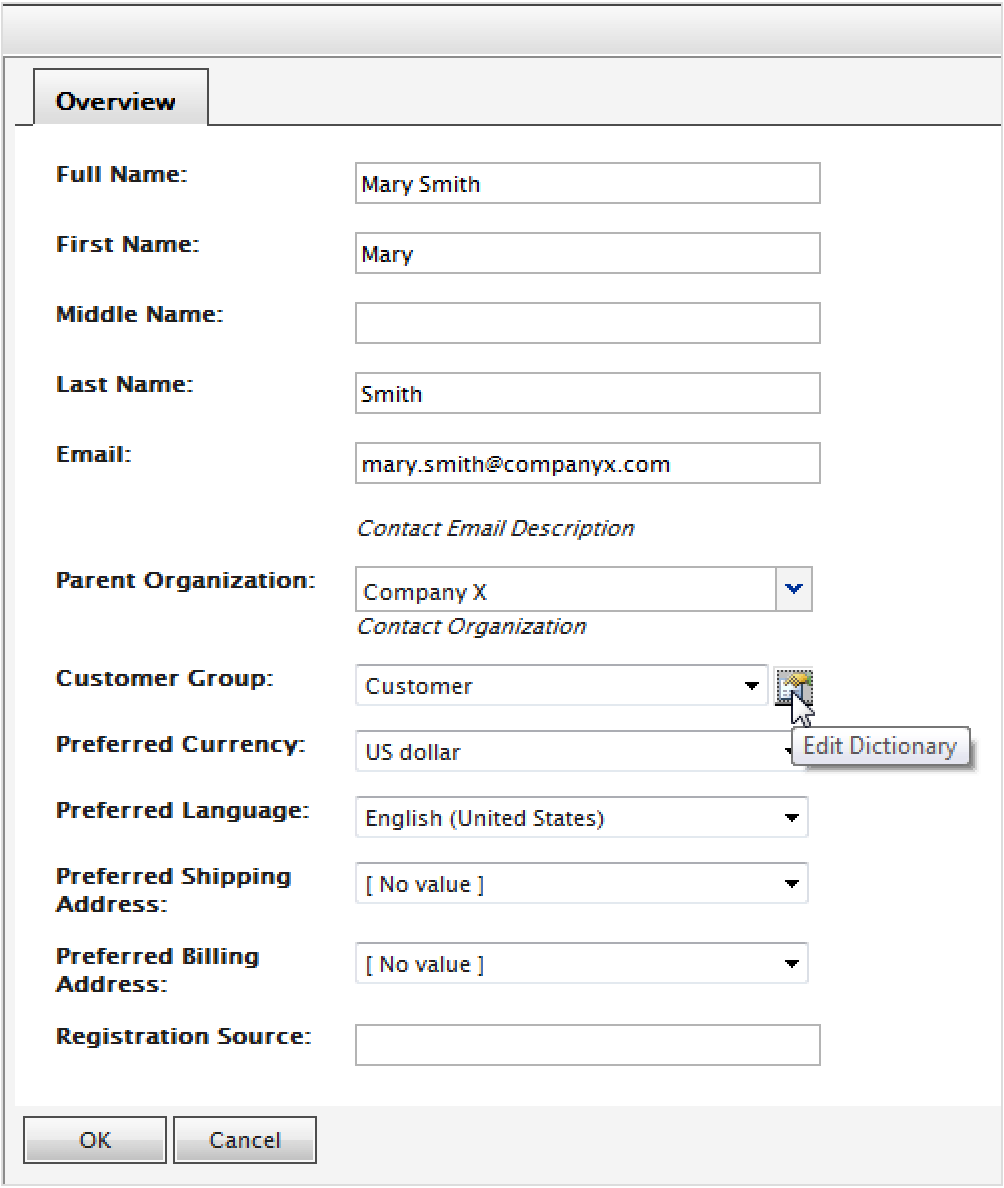
> Note: You cannot change the **User Name** unless you remove the account and recreate the same account again.

- **Delete a contact**. Select the contact in the list of contacts click **Delete**. Click **OK** to confirm.
- **Delete an account**. Select the related contact in the contact list and click **Remove Account** in the lower part of the dialog box.

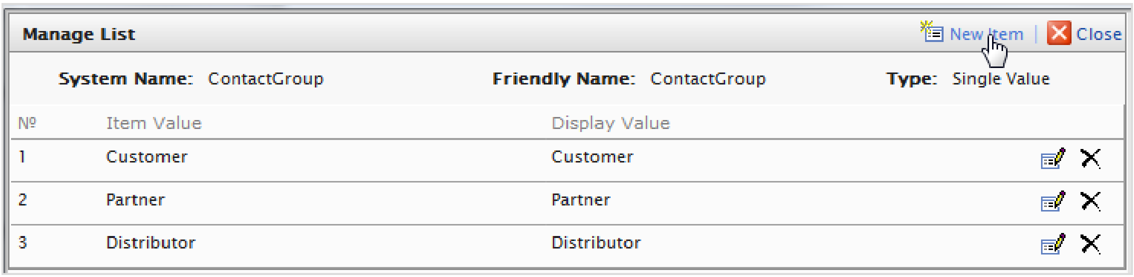
Adding dictionary values for a contact

You can create your own customer (contact) groups that you can apply when you add contacts to your organization. By default, customer groups can be of type **Customer**, **Partner** or **Distributor**. This type of data is managed in dictionaries. You can use customer groups when you define pricing or restrict promotions.

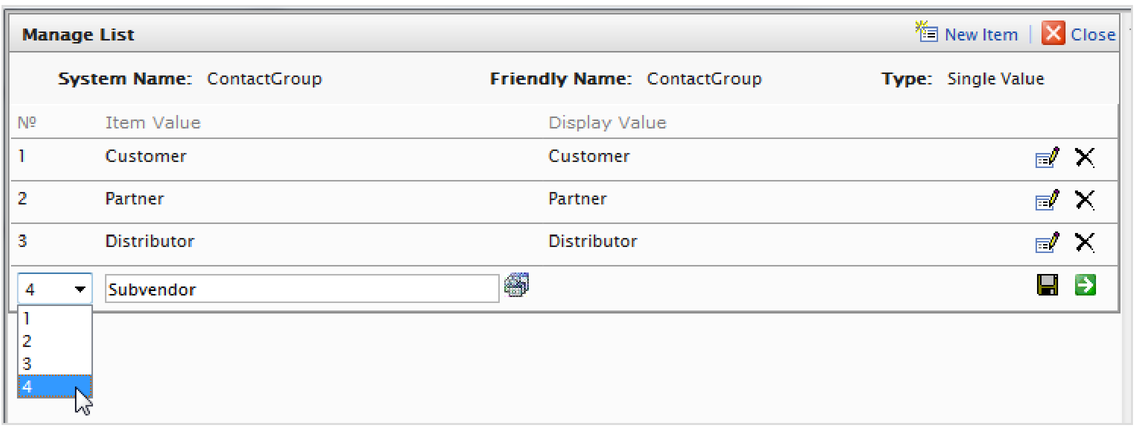
1. In **Commerce Manager** > **Customer Management**, open the **Contacts Edit** page by creating a new contact or editing an existing one. Click **Edit Dictionary** next to the Customer Group drop-down list.



2. On the dialog box that appears, click **Edit** to modify an existing customer group dictionary. To add a new item to the dictionary, click **New Item**.



3. Select the order of the item from the drop-down list on the left and enter a name for the item on the field next to the drop-down list.



4. Click **Save**.
5. Click **Close**. You can select the dictionary item in the **Customer Group** drop-down list.

To delete a dictionary item, open the dictionary list and click **Delete** next to the item.

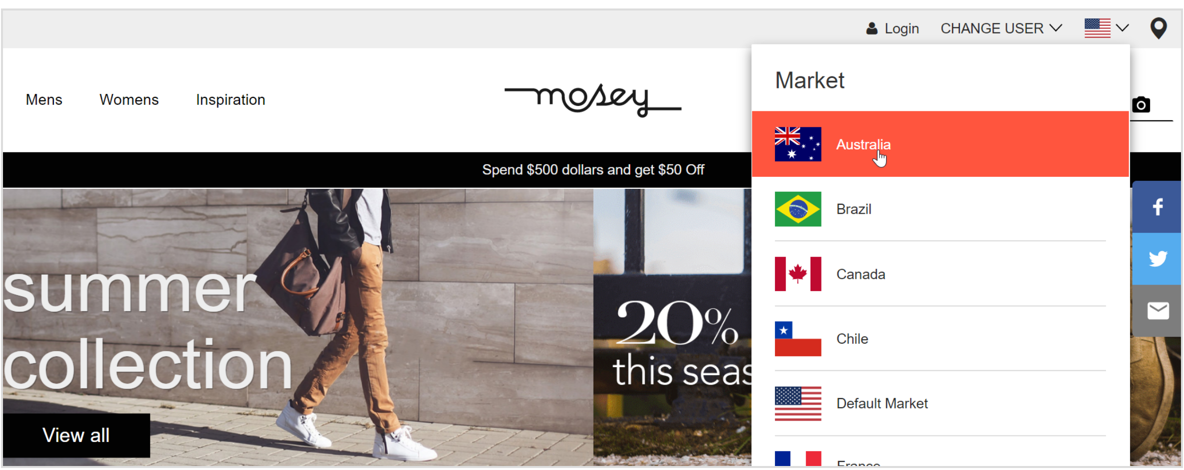
> Note: If you change the number to a position higher in the list, the list is not automatically reordered. You must manually edit the list. However, having multiple copies of the same numerical value does not affect the system. You can use the numbers as a ranking system, or devise your own internal numbering method.

Markets

Markets are designed to help you target merchandising and create more personalized user experiences. For example, you create a 20% off promotion to mark Independence Day in Canada. Only products in the Canadian market are eligible.

A single site can have multiple markets, each with its own product catalog, language, currency, and promotions. The market determines which products and prices a customer sees on the website. When creating a market, you can define a geographic entity (such as region, a country, a group of countries).

Developers implement markets during site creation, and each implementation can be different. Some sites let the customer choose the market (see example below). Others use different URLs for different markets, for example `yoursite.uk` and `yoursite.de`. As another alternative, a site can extract a customer's geographic location from the IP address to determine the appropriate market.



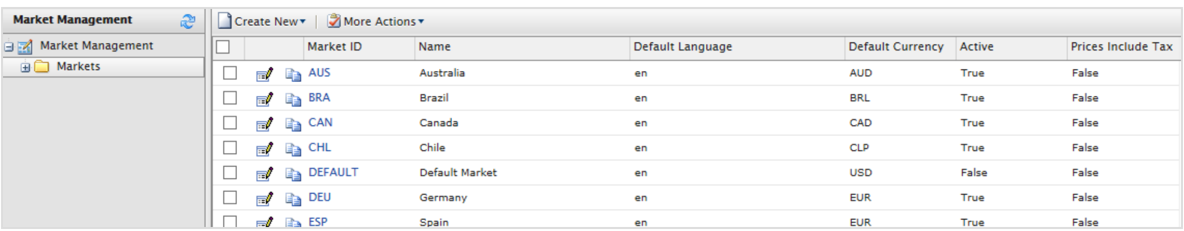
How markets are used

- When browsing in Catalog View, you can filter results by market.
- When viewing a variant.
- When defining a variant's pricing information, you assign a market then its price in an appropriate currency.
- You can filter reports by market.

- As a criterion when creating a customer group.
- Order management objects (purchase orders, shopping carts, payment plans, wish-lists) have a market. You can filter by them.
- Shipping methods and payment options are assigned to markets.

Browsing markets

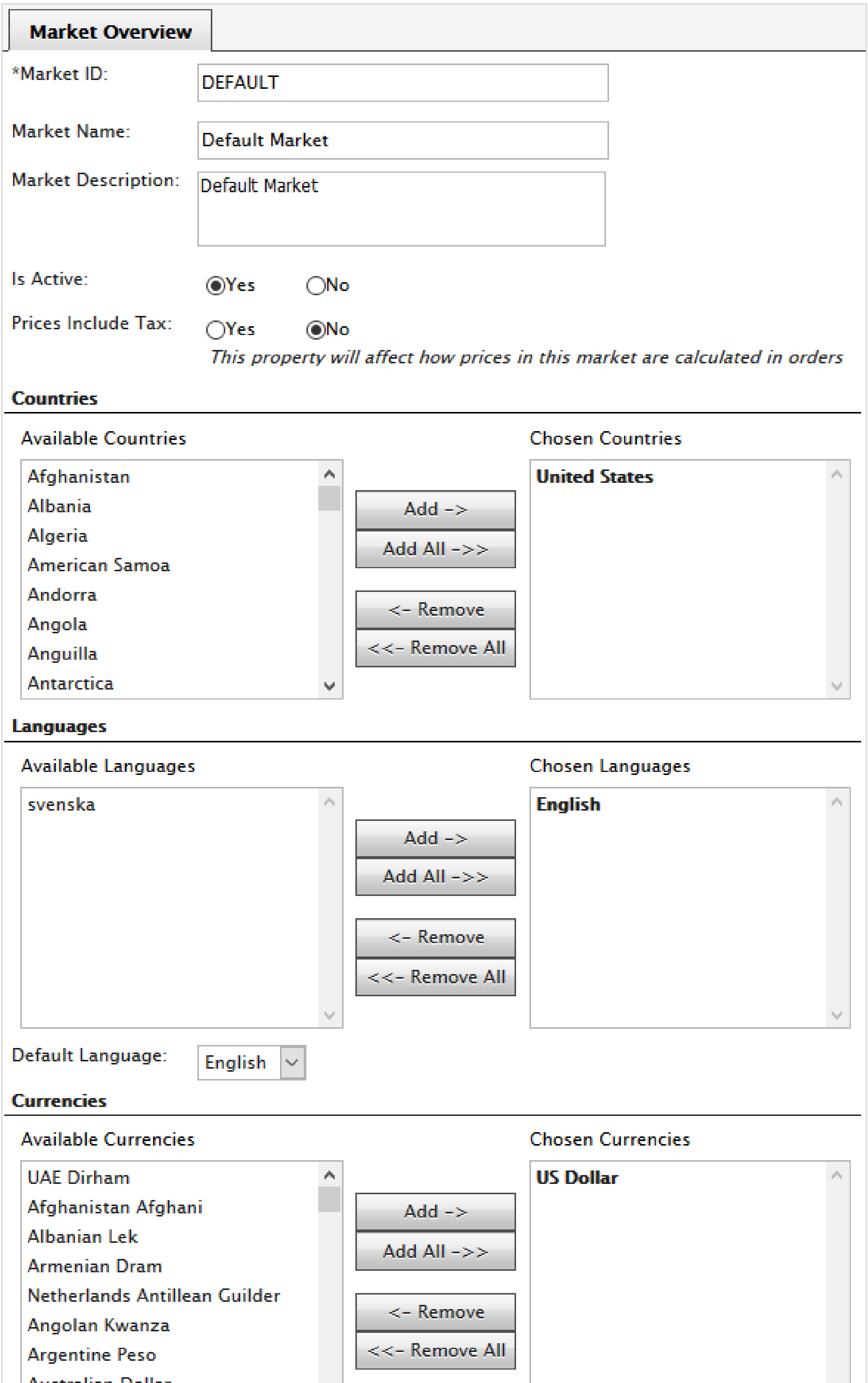
Go to **Commerce Manager** > **Market Management** > **Markets** and expand the markets. The market overview displays existing markets with their languages, currencies and status (active or not), and whether the prices include tax.



> Note: The **Default Market** defines the language and currency used as a fallback for markets that are not specified.

Creating or editing a market

1. Go to **Commerce Manager** > **Market Management** > **Markets**. The markets list appears.
2. Select **Create New** > **New Market**, or select an existing market from the list. The **Market Overview** tab appears.


Market Overview
*Market ID:
DEFAULT
Market Name:
Default Market
Market Description:
Default Market
Is Active:
Yes
No
Prices Include Tax:
Yes
No
This property will affect how prices in this market are calculated in orders
Countries
Available Countries
Afghanistan
Albania
Algeria
American Samoa
Andorra
Angola
Anguilla
Antarctica
Add ->
Add All ->>
<- Remove
<<- Remove All
Chosen Countries
United States
Languages
Available Languages
svenska
Add ->
Add All ->>
<- Remove
<<- Remove All
Chosen Languages
English
Default Language:
English
Currencies
Available Currencies
UAE Dirham
Afghanistan Afghani
Albanian Lek
Armenian Dram
Netherlands Antillean Guilder
Angolan Kwanza
Argentine Peso
Add ->
Add All ->>
<- Remove
<<- Remove All
Chosen Currencies
US Dollar

- **Market ID**. Enter an identifier for the market.
- **Market Name**. Enter the name that appears in the markets list.
- **Market Description**. Enter free-text notes about the market.
- **Is Active**. **Yes** to activate; **No** to deactivate. Only active markets can be used by visitors when shopping.
- **Prices Include Tax**. Check **Yes** to indicate that the prices returned for this market include tax. You would typically do this for markets where customers usually see and shop with prices that include tax (for example, most EU countries).

  You might want to do this to send a tax-included price to the front-end site, so a customer can see the price including tax when shopping. At checkout, when the Episerver Commerce system has enough information to accurately calculate the tax, you can implement business logic to subtract the included tax amount from the actual tax.

- **Countries**. Select each country you want and click **Add**.

  A developer can use a market's country to build site features. For example, you define a Nordics market that includes all European Union countries. If a site visitor's IP address belongs to Sweden, he or she belongs to the EU market.

- **Languages**. Select each language you want and click **Add**.

  A developer can use a market's language to build site features. For example, in the Quicksilver sample site, a site visitor's market determines the default language for that user.

  > Note: A website can support several languages. By defining a market's language, you allow a market to display content in that language.
  >
  > For example, if you select English as the preferred language, it does not automatically mean that a visitor belongs to the US or UK markets. You can provide content in English for a Swedish market, for non-Swedish speaking visitors in Sweden.

- **Currencies**. For each currency you want, select the currency and click **Add**.
- **Default currency**. Set the default fallback currency.

3. Click **OK**.

Deleting a market

1. Go to **Commerce Manager** > **Market Management** > **Markets**. The markets list appears.
2. Check the box next to the market you want to delete.
3. Select **More Actions** > **Delete Selected**.
4. Click **OK**.

Marketing

> Note: The marketing system provides a new Campaigns user interface, in addition to the legacy campaign system, for managing campaigns and discounts.

Use Episerver's **Marketing** system to create discounts and promotions that can be applied to products, orders, or shipping. Typically, promotions are created and managed by marketing and catalog managers, and other users who handle pricing and discounts.

The marketing features allow you to create campaigns with unique and compelling discounts. Discounts are typically based on a percentage or fixed value. You can target discounts to specific customers, time periods, or markets.

Common marketing tasks are listed below. Available tasks depend on whether you are using the new Marketing system, or the legacy marketing system.

Marketing view

- Creating and managing campaigns
- Creating discounts
- Prioritizing discounts
- Discount exclusions
- Built-in discounts

Marketing system in Commerce Manager (Legacy)

- Creating and managing campaigns, which can be targeted to specific groups of users.
- Configuring customer segments, for targeting of promotions to specific groups of users and customers.
- Creating different types of promotions with discounts and coupons.
- Configuring expressions and policies for defining additional rules and promotion types.

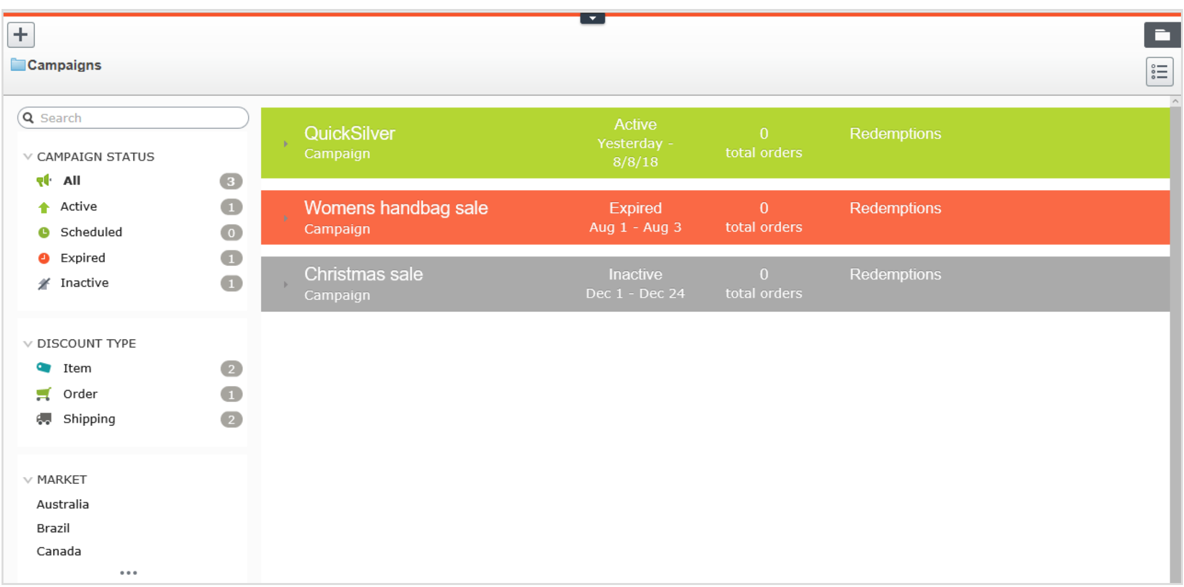
Campaigns and discounts

The Campaigns feature lets you create campaigns to manage discounts when deploying targeted marketing efforts. You can assign a campaign to a specific market, to serve local needs, or to all markets. You can also limit a campaign to members of selected visitor groups.

When setting up a campaign, you define its essential information, such as active date range, target market, eligible visitor groups, and discounts.

Campaign view

To view existing campaigns or create new ones, go to the top menu and select **Marketing**. The Campaign view displays each campaign's status and discounts. From Campaign view, you can perform tasks such as create new campaigns, edit existing ones, create and edit discounts, and so on.



Understanding the Campaign View

The Campaign view sorts campaigns by *status* (identifiable by background color), described below.

- Active (green). **Active** box is checked, **Available from** date is in the past, and **Expires on** date is in the future.
- Scheduled (orange). **Active** box is checked but **Available from** date is in the future.
- **Expired** (red). **Active** box is checked, but **Expires on** date is in the past.
- Inactive (gray). **Active** box is unchecked.

> Note: Below each campaign, its discounts appear on a white background.

On the Campaign view, each discount has an icon that illustrates the discount type.

- Discount applies to entire order.
- Discount applies to items.
- Discount applies to shipping costs.

The Campaign view also displays numbers for each campaign and discount.

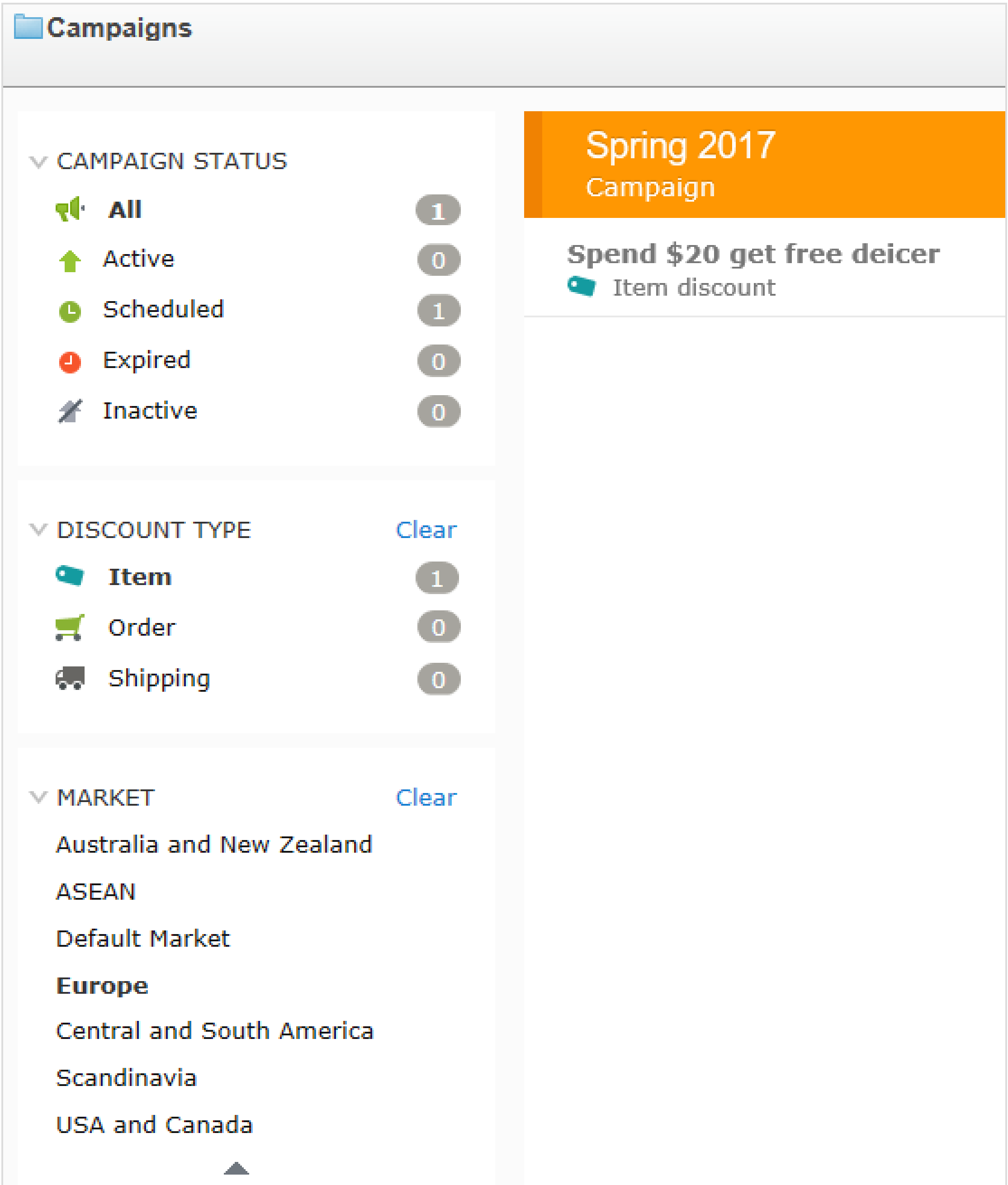
- For each *campaign*, you see the number of orders that include discounts. If an order has multiple discounts that belong to different campaigns, that order increases each campaign's total.
- For each *discount*, the Campaign view displays
    - the total number of orders that include it.
    - *redemptions*, the number of times a discount reduces cost. For example, a discount provides 20% off all sweatshirts.
        - If one order includes three sweatshirts, the redemption for that order is 1.
        - If three orders include one sweatshirt each, the discount for all orders is 3.

These numbers are not updated in real time. They are only updated when the Collect orders per promotion statistics scheduled job runs.

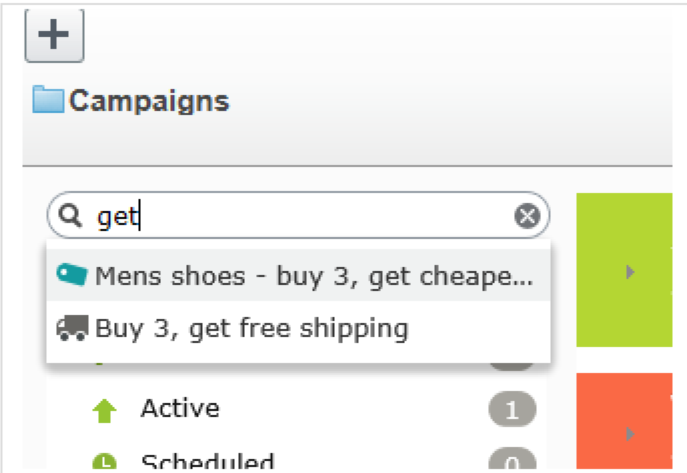
> Note: Canceled orders do not appear on Campaign View.

Campaign View facets and search

The view's left pane displays *facets* and a search. Use facets to filter information by selecting a campaign status, and one or more discount types and market. If you select facets, the view is refreshed, showing only campaigns and discounts that include your selections. Next to each facet is a number indicating how many campaigns and discounts include it.



Campaign View contains a search to help you find campaigns or discounts. The search only examines campaign and discount *titles* — it does not consider other fields.



Search tips

- The search ignores any selected facets.
- You need to enter at least two characters to get results.
- The search includes active and inactive campaigns and discounts.

Creating a campaign

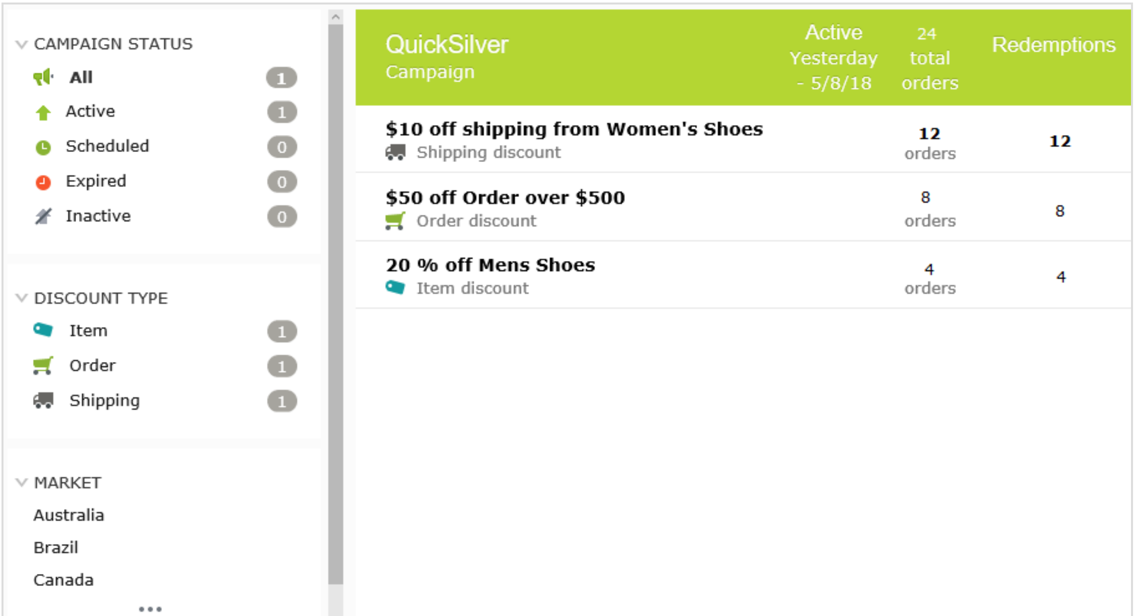
To create a campaign, identify the following:

- Schedule
- State (active or inactive)
- Market
- Revenue goals
- Google tracking code
- Visitor groups
- Discounts

> Tip: You can watch the following demonstration video, Demo of creating a campaign and discount. (4:46 minutes)

1. From edit view, select **Commerce** > **Marketing**.
2. Select **Create +** > **Campaign**.

3. Assign a name to the campaign. The Edit Campaign view appears.



4. Complete its fields using the following information, then click **Save**.

Campaign fields

Field	Description
Name	The campaign name appears. Edit if desired. The name appears on the Campaign view and on dialogs that let users select campaigns.
Description	Enter a description of the campaign. It only appears on this view.
Scheduling and Status	
Available from	Select the date and time when the campaign is available. The campaign is active only if the shopping date/time is between the **Available from** and **Expires on** dates/times *and* the **Active** box is checked. Note: The time refers to local time on the Episerver server. For example, you manage the website from Stockholm, Sweden and set a cam-paign to expire at 11:00 PM. Due to a nine-hour

Field	Description
	time difference, for a customer in California, USA, the campaign expires at 2:00 PM.
Expires on	Select the date and time when the campaign is no longer available.
Active	Select the box to make the campaign active, or clear it to make it inactive. For a campaign to be active, the **Active** box must be selected *and* the shopping date/time must be between the **Available from** and **Expires on** dates/times. **Active check box examples** • When you set up a new campaign (including its discounts), keep **Active** cleared. When everything is correct, select **Active**, and the campaign goes live. • An active campaign is configured incorrectly. Clear **Active** to pause the campaign, correct it, then select **Active** to enable it.
Market and Revenue	
Target markets	Select one or more target markets. If you select no markets, the campaign is effectively inactive. **Effects of choosing markets** • If you choose one or more markets, only customers in those markets are eligible to receive this campaign's discounts. • If you create a discount for this campaign that involves an amount reduction, the list of currencies is determined by the active currencies for countries in the selected market(s).
Revenue goal	Specify a revenue goal for the campaign. Note: Episerver Commerce does not currently use this value—you must manually track campaign revenue.
Tracking Code	Use to enter a tracking code for campaign analytics. This field must be

Field	Description
	specifically implemented for your site. This tracking code is only a data property. So, for example, you can create a Google Analytics tracking code, use that, then save the code for your campaign to map the data later. Episerver Commerce does not use the tracking code for any internal functionality. By default, the code is not stored with the order after checkout. But you can get promotions from `IOrderForm.Promotions`, then get their campaigns and tracking codes.
Personalization	If you want to limit this campaign to certain visitor group, select them. If you do, only group members can use the campaign's discounts. See also: Commerce-specific criteria. **Note**: If more than two visitor groups are selected, hover over the ellipsis to see them all.
Discounts	See Discounts

Editing a campaign

1. From the Campaign view, hover over a campaign. On the far right side, a context menu appears.
2. Select **Edit**.
3. Modify the fields.

Deleting a campaign

1. From the Campaign view, hover over a campaign. On the far right side, a context menu appears.
2. Select **Delete**.

> **Note**: Deleting a campaign cannot be undone, and all discounts created for the campaign are also deleted.

See also:Discounts

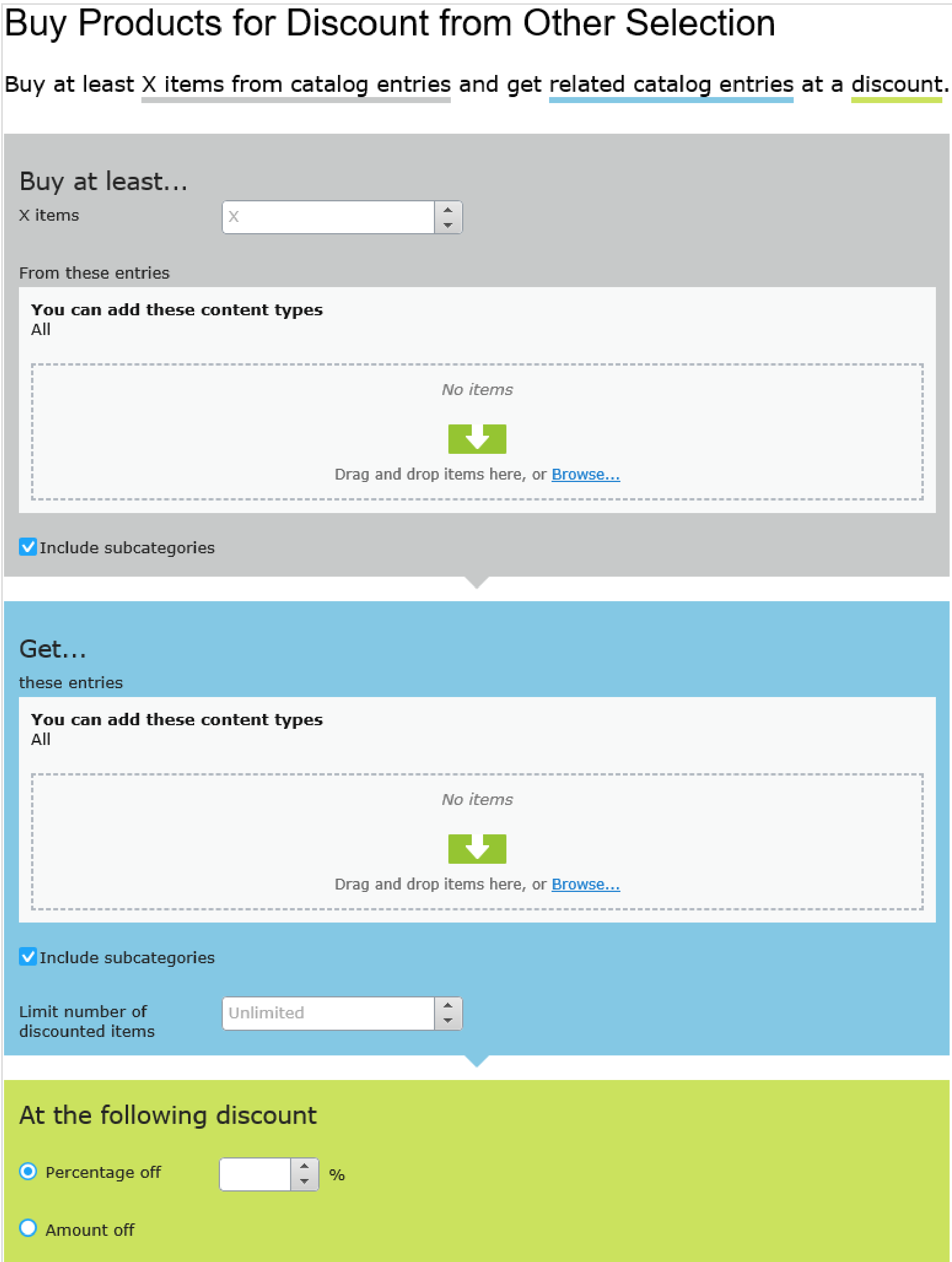
Discounts

Episerver Commerce has a powerful and flexible feature for applying discounts to create targeted campaigns. Episerver Commerce offers a set of standard discounts, featuring the most common setups, which you can easily customize to accommodate specific campaigns.

Discount colors

A discount is color-coded to help you identify its components.

- Gray. Products or categories from which purchases must be made to activate the discount.
- **Blue**. Discounted items.
- **Green**. Discount amount or percentage.


Buy Products for Discount from Other Selection
Buy at least X items from catalog entries and get related catalog entries at a discount.
Buy at least...
X items
X
From these entries
You can add these content types
All
No items
Drag and drop items here, or Browse...
Include subcategories
Get...
these entries
You can add these content types
All
No items
Drag and drop items here, or Browse...
Include subcategories
Limit number of discounted items
Unlimited
At the following discount
Percentage off
%
Amount off

Creating a discount

Discounts are a key component of an effective marketing campaign, for example "buy 3, get the cheapest for free."

> Warning: If you create several concurrent promotions that apply to one line item with quantity greater than one, be sure you understand the impact of all promotions on an order.

Prerequisite: A campaign. If no campaigns exist, **create one**.

Video: Demo of creating a campaign and discount

> Tip: You can watch the following demonstration video, Demo of creating a campaign and discount. (4:46 minutes)

1. Access the Discount view using any method listed below.
   - From the Campaigns view's top left corner, select **Create > Discount**.

     > Note: When using this option, you select a campaign then define the discount.

   - From a campaign's context menu, select **New Discount**.
   - While editing a campaign or creating a new one, select **+ New Discount**.
2. Assign a name to the discount.
3. Choose a discount type. (See Built-in discounts.) The **Edit Discount** view appears.
4. Complete the fields using the following information, then click **Save**.

   Discount fields

Field	Description
Name	Enter the name of the discount.
Description	Enter a description of the discount. The description only appears on this view. Use it to communicate the discount's purpose to other merchandisers.
Banner Image	If you want to use a banner image with this discount,

Field	Description
	upload it to the Episerver media folder, then select it here. Uploading media. The image can illustrate the discount on the web page. Your developer determines how to display the banner.
Scheduling and Status—By default, a discount's start and end dates match its campaign's dates. To change the discount's active dates, click **Different start and end dates, within the campaign dates** and complete the following fields.	
Available from	Select the date and time when the discount is available. The discount is active only if the shopping date/time is between the **Available from** and **Expires on** dates/times, and the **Active** box is selected. **Note**: The time refers to local time on the Episerver server. For example, you manage the website from Stockholm, Sweden and set a campaign to expire at 11:00 PM. Due to a nine-hour difference, for a customer in California, USA, the campaign expires at 2:00 PM.
Expires on	Select the date and time when the discount is no longer available.
Active	For a discount to be active, the shopping date/time must be between the available and expiration dates/times, *and* the active box must be selected. **Active check box examples** • While setting up a new discount, keep **Active** cleared. When everything is correct, select **Active**, and the discount is live. • An active discount is configured incorrectly. Clear **Active** to pause it, correct it, then select **Active** to enable the discount.

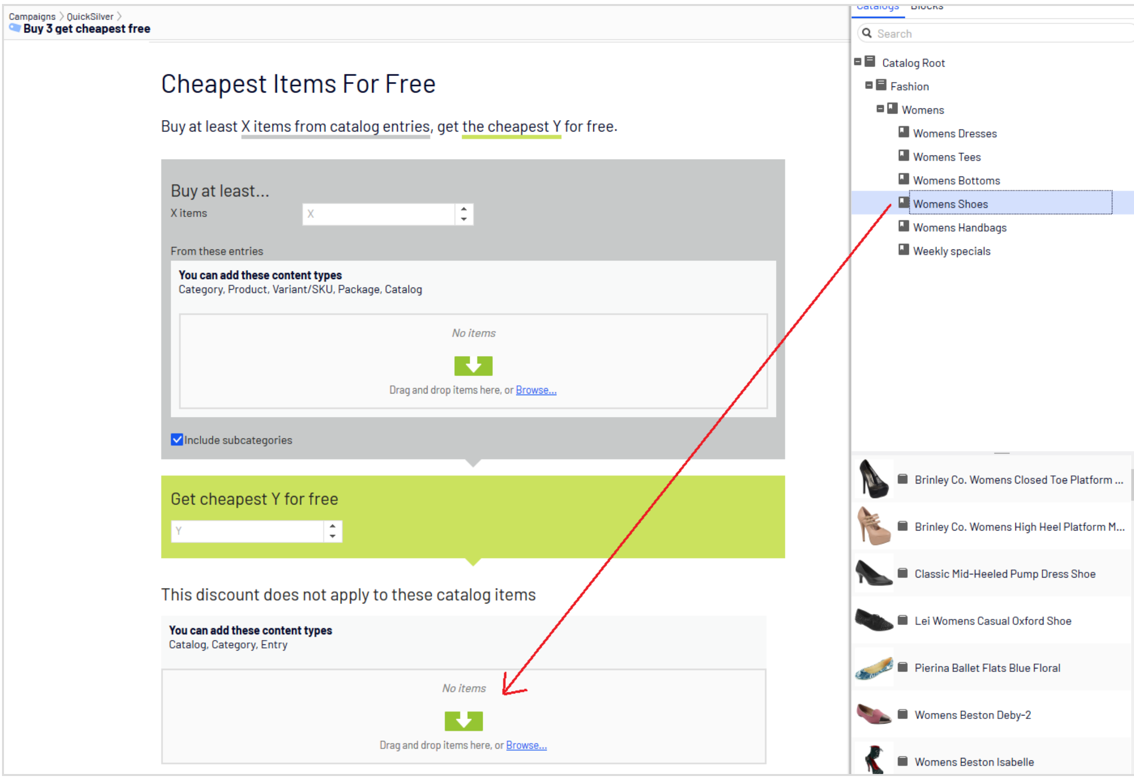
Field	Description
Promotion codes	If applicable, enter a promotion code for this discount. Promotion codes are also known as coupons. See also: Using promotion codes.
Discount Complete the information to define the discount. See Example: Buy three items, get cheapest free and Built-in discounts.	
This discount does not apply to these catalog items	Use this area to exclude catalogs, categories, or catalog entries from a specific discount. See Exclude catalog items from a discount.
Redemption limits	If applicable, enter one or more *redemption limits* for this discount; that is, the maximum number of times a discount can be redeemed. See also: Applying redemption limits.

Example: Buy three items, get cheapest free

Assume you want to implement the following discount: If a customer buys 3 automotive accessories, the least expensive item is free. To create that discount, follow these steps.

Prerequisite: A campaign. If no campaigns exist, **create one**.

1. From the Campaigns view's top left corner, select **Add** > **Discount**.
2. Select the campaign to which the discount will belong.
3. Assign the name **AutoAcc Buy 3 get cheapest free**.
4. For **Type**, select **Get Cheapest for Free**.
5. At the **Scheduling and Status** area, select the discount's beginning and ending dates and whether the discount is active.
6. This example assumes that the discount does not use a **Promotion code**, so ignore that field. See also: Using promotion codes
7. At the **Buy... at least X items** field, enter **3**.
8. From the top right corner of the view, click **Catalogs** .
9. Select **Automotive > Accessories** then drag and drop it to the area below **from these categories/entries**. See also: Selecting discount-eligible items.



10. At the **Get cheapest Y for free** field, enter **1**.
11. Click **Save**.

Selecting discount-eligible items

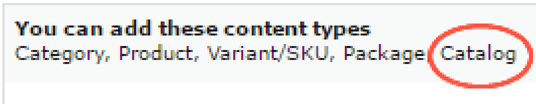
To select discount-eligible items, drag and drop them from the catalog or click **Browse.**

> **Note**: If you select no items, the discount is not applied.

When working in the gray area of the view, you can select:

- One or more categories. Its products are eligible. Use the **Include subcategories** box to determine if products in selected categories' subcategories also are eligible. By default, the box is selected.
- Individual products, SKU, or package.

- Some discounts let you select a catalog. If you can, **Catalog** appears on the view.



> Note: A package counts as one item when calculating the X in **Buy at least X items**.
>
> If a bundle is purchased, its items are treated like they were ordered separately.

Copying a discount

You can copy (or cut) and paste any discount to another campaign using menu options or drag and drop. You can also copy and paste a discount to its current campaign. If you do, a number is appended to its name to distinguish it from the original discount.

Impact of copying on a discount's field values

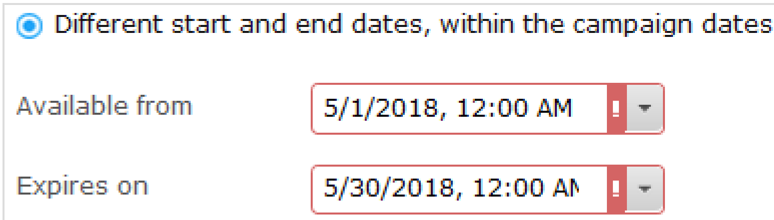
When you copy a discount, all field values from the original discount are copied to the new one with the possible exception of these.

- **Status**. The copied discount is inactive by default.
- **Dates**.

  If the scheduling value is **Same as the campaign**, the value is maintained, and the dates are adjusted to match the "copy to" campaign's active dates.

  If the scheduling value is **Different start and end dates**, those dates are copied to the new discount.

  - If one or both dates are outside of the "copy to" campaign’s date range, a warning appears next to that date. No other warning is issued either initially or if you later edit the discount.



If a conflict exists between a campaign's and a discount's active dates, the campaign's active dates override the discount's active dates. For example, a campaign runs from June 1 until June 30 at midnight, while one of its copied discounts has a begin date of June 15 and an end date of July 15. As of July 1, that discount is no longer active.

Copy procedure

1. From Marketing view, identify the campaign that contains the discount that you want to copy.
2. Expand the campaign to see its discounts.
3. From the discount's context menu, choose **Copy** or **Cut**.
4. Move to the campaign to which you want to copy the discount.
5. Select **Paste** from the campaign's context menu.

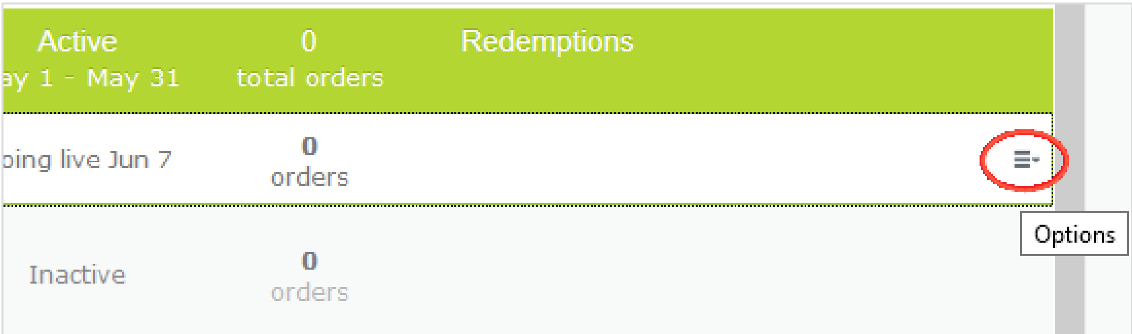
> Tip: You can also drag and drop a discount to another campaign.

Editing a discount

Follow these steps to edit a discount.

1. From Marketing view, identify the campaign that contains the discount that you want to copy.
2. Click the small arrow on the left side of the campaign. Its discounts appear.

3. Hover over the right side of the discount until its menu icon appears.

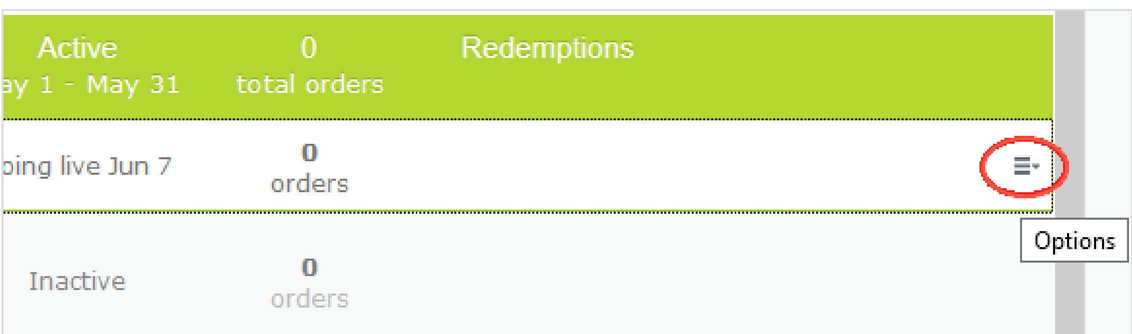


4. Click the icon then **Edit**. To learn about the fields, see Discount fields.
5. Edit the desired information then click **Save**.

Deleting a discount

Follow these steps to delete a discount. You cannot recover a deleted discount.

1. From Marketing view, identify the campaign that contains the discount that you want to delete.
2. Click the small arrow on the left side of the campaign. Its discounts appear.
3. Hover over the right side of the discount until its menu icon appears.



4. Click the icon then **Delete**.
5. Click **Save**.

How Episerver Commerce determines which items to discount

Sometimes, an order has several discount-eligible items but not all can be discounted. For example, if a customers buy 5 shirts, they get a discount on two. Or, the **limit number of discounted items** drop-down restricts how many items get discounted. To determine *which* items are discounted, Episerver Commerce calculates the *maximum customer savings*.

Example

Discount: Buy at least 9 eligible items, and get a 25% discount on three. Assumes no redemption limits.

Sample order before discount

Item	Quantity	Cost per item	Item total
White shirt	5	$5.00	$25.00
Blue shirt	2	$10.00	$20.00
Yellow shirt	2	$15.00	$30.00
			Total cost = $75.00

After discount

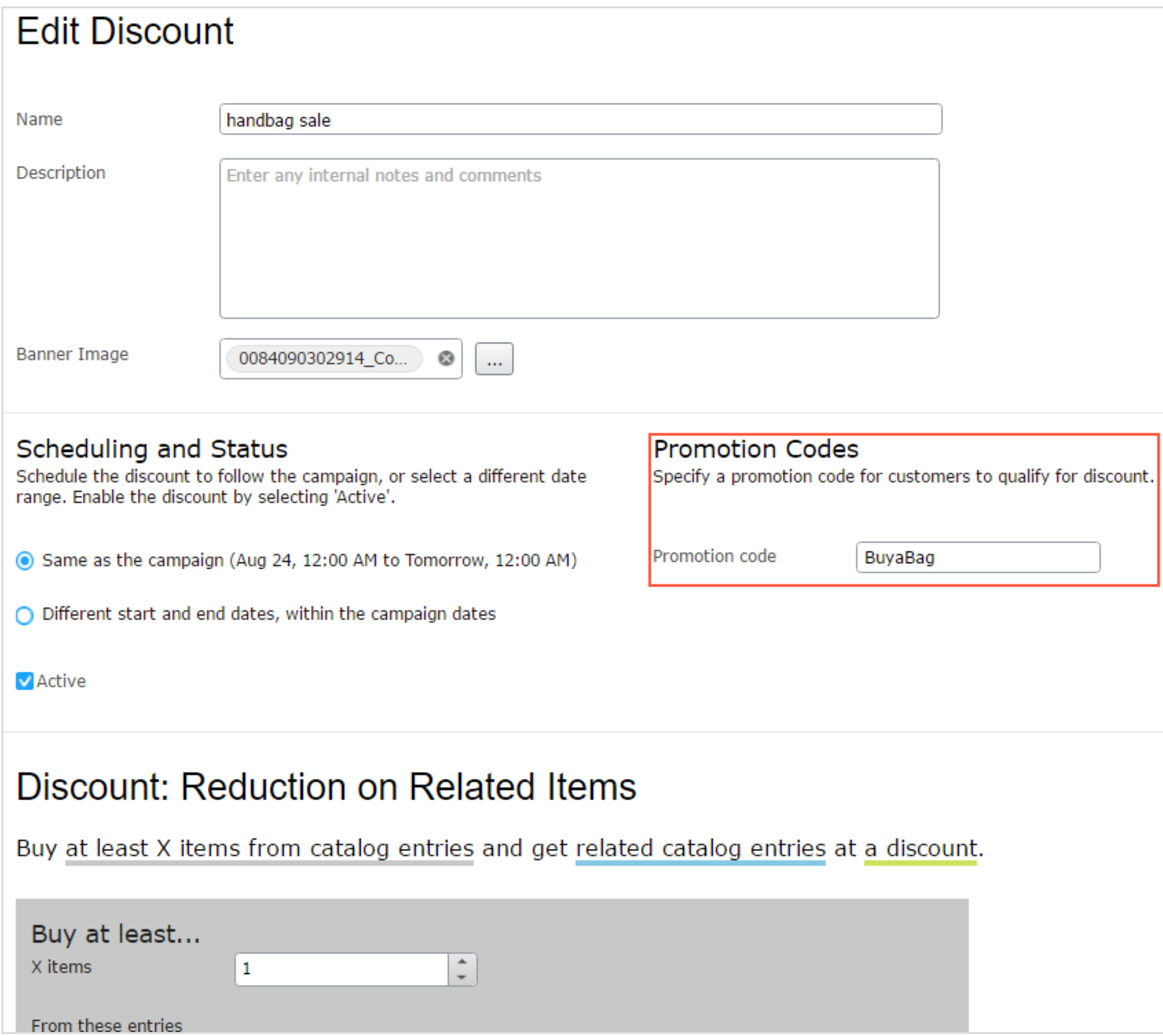
To maximize customer savings, the discount is first applied to the two most expensive items, the yellow shirts. Next, it is applied to one of the next most expensive items, a blue shirt. Since only three items are discounted, the second blue shirt is full price.

Item	Quantity	Cost per item	Line item total
White shirt	5	$5.00	$25.00
Blue shirt	1	$10.00	$10.00
Blue shirt	1	$7.50 (25% discount on 1 item)	$7.50
Yellow shirt	2	$11.25 (25% discount on 2 items)	$22.50
			Total cost = $65.00

Using promotion codes

A promotion code (also known as a *coupon*) is an additional criterion that you can apply to any discount. A typical use case is: customers who enter promotion code **CouponABC** during checkout receive 10% off the order.

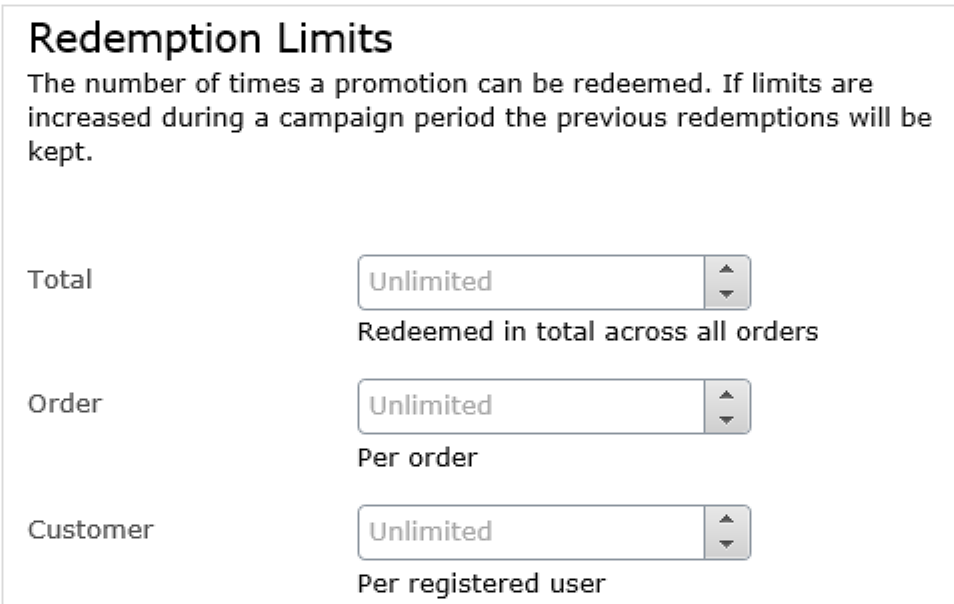
To apply a promotion code to a discount, create the discount as you normally do. Then, in the discount view's **Promotion codes** field, enter a unique promotion code.



If you create such a discount, it is activated if the customer enters the promotion code and the other discount criteria are satisfied (for example, the discount is active, date is within the active date range, eligible products are selected, and so on).

Applying redemption limits

When creating a discount, you can set redemption limits, that is, the maximum number of times a discount can be redeemed on a single order form. Set these limits on the **Edit discount** view. See also: Creating a discount.



There are three types of redemption limits.

- **Total**. The maximum number of times a discount can be redeemed across *all orders and customers*.
- **Order**. The maximum number of times a discount can be redeemed on a single order form.

  > Note: This limit is not available to discounts that apply to an entire order.

- **Customer**. The maximum number of times that one *customer* can redeem a discount. If you set this limit, the discount is not available to anonymous (not logged-in) users.

You can adjust redemption limits at any time during a campaign. If you do, it does not affect the number of redeemed discounts.

> Note: Built-in order and shipping promotions have a default value of one redemption per order.

Combining redemption limits

You can set a redemption limit on the total number of discounts, or per order, or per customer. And, you can combine limits. If you set more than one, during validation, the lowest number of available discounts determines if the discount is still available. For example, a discount has three limits:

- Per discount: 500
- Per customer: 10
- Per order: 5

If a discount was redeemed 497 times, and the logged-in customer has not redeemed it yet, and the discount was not used on this order, the maximum number of redemptions is 3.

To continue the example, once the discount is redeemed 500 times, it is no longer available.

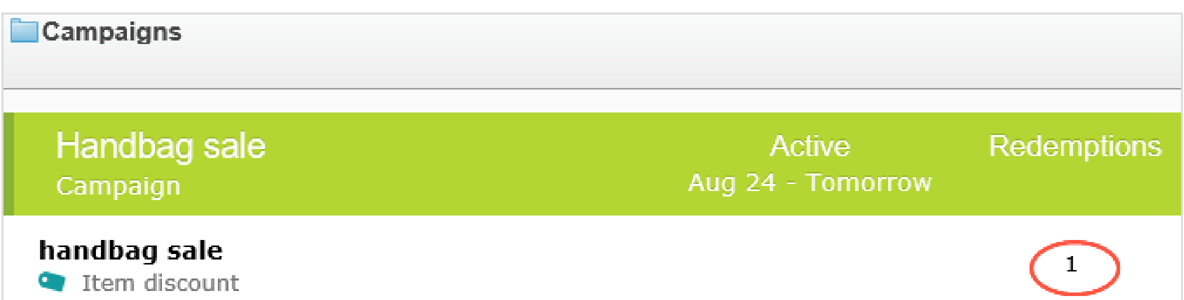
Here is another example.

- Per discount: unlimited
- Per customer: 10
- Per order: 2

If a customer creates an order and tries to apply this discount to three items, only two items (the per order limit) are discounted. The third item is full price.

Viewing the number of redeemed discounts

The Campaign View shows the current number of redemptions for each discount.



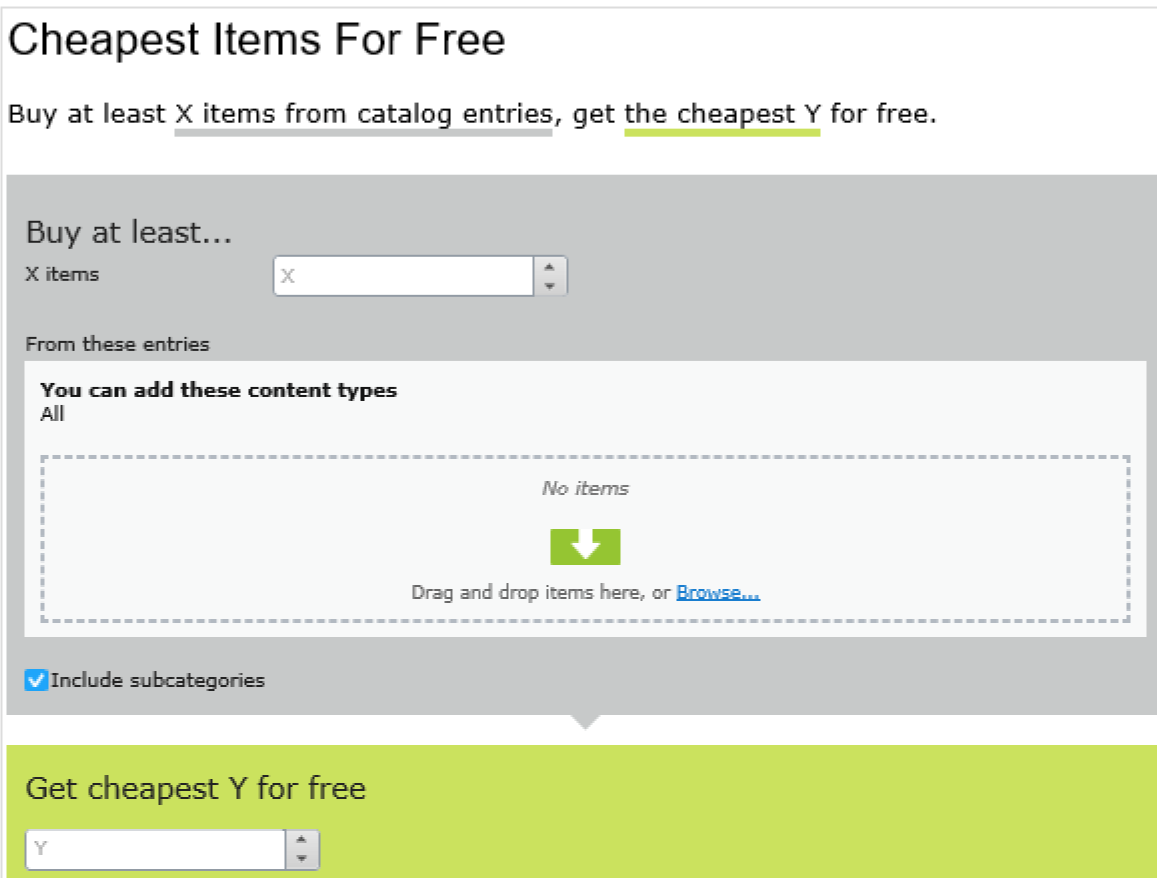
Built-in discounts

Episerver Commerce provides many common discounts out-of-the-box. This topic explains the built-in discounts.

Item discounts

Cheapest items for free

Buy at least **X** eligible items, and get the cheapest **Y** items for free. For example, on an order that has 5 electronic accessories, the cheapest one is free.



Example

Buy at least 10 eligible products, get the cheapest 3 for free. Assumes no redemption limits.

Sample order before discount

Product	Quantity	Cost per product	Line total
White shirt	5	$5.00	$25.00
Blue shirt	3	$10.00	$30.00
Yellow shirt	3	$15.00	$45.00
			Total cost of order = $100.00

After discount

Product	Quantity	Cost per product	Line total
White shirt	5	$5.00	$10.00; 3 of 5 shirts are free
Blue shirt	3	$10.00	$30.00
Yellow shirt	3	$15.00	$45.00
			Total cost of order = $85.00

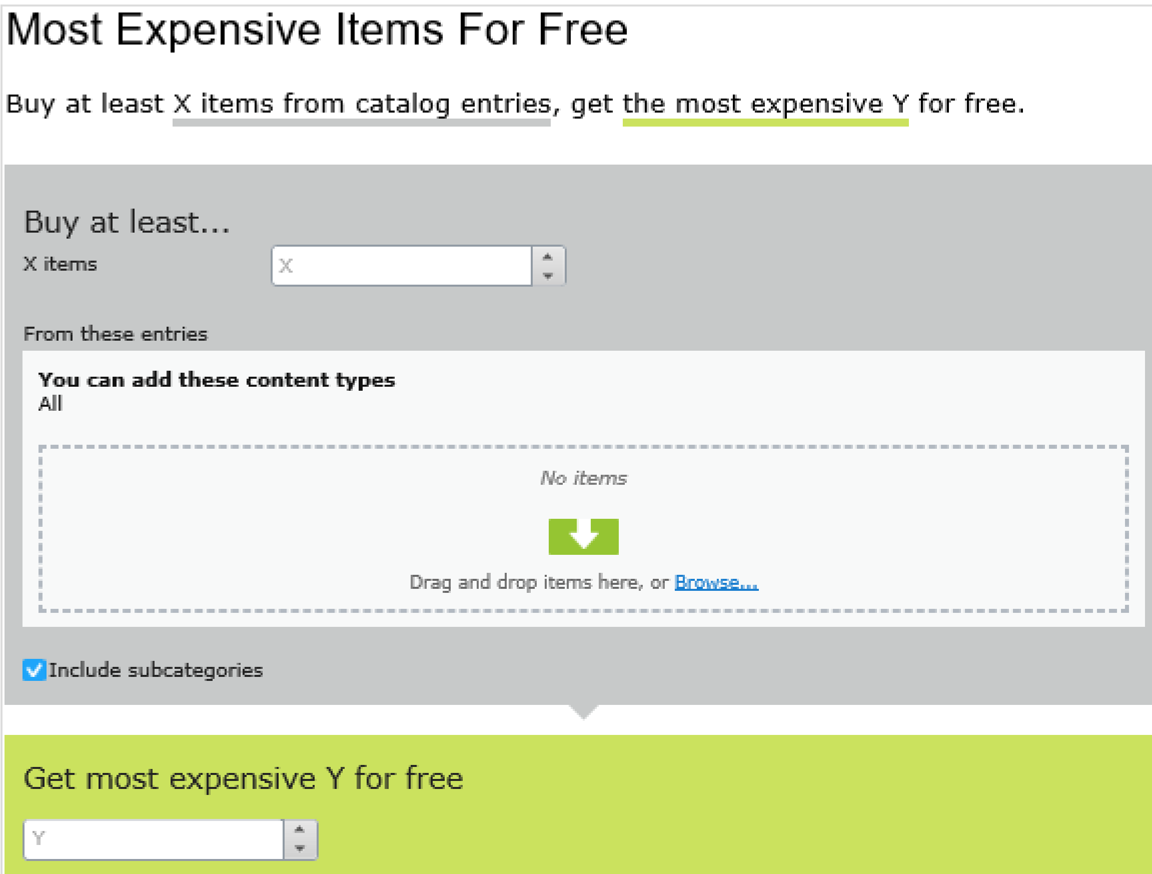
The view has two sections:

- **Buy at least X items....** Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Get the cheapest Y for free**. Enter the number of items to which no charge will be applied at checkout. Only this number of the cheapest items will be free.

This discount supports multiples. That is, if a promotion is "buy at least 5 eligible items, and get the most expensive 1 item for free", and a customer buys 10 items, they get 2 free items. You can limit this factor by applying redemption limits.

Most expensive items for free

Buy at least **X** eligible items, and get the most expensive **Y** items for free. For example, if an order includes 5 hardcover books, the most expensive one is free.



The view has two sections:

- **Buy at least X items…**. Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Get most expensive Y for free**. Enter the number of items to which no charge will be applied at checkout. Only this number of the most expensive items will be free.

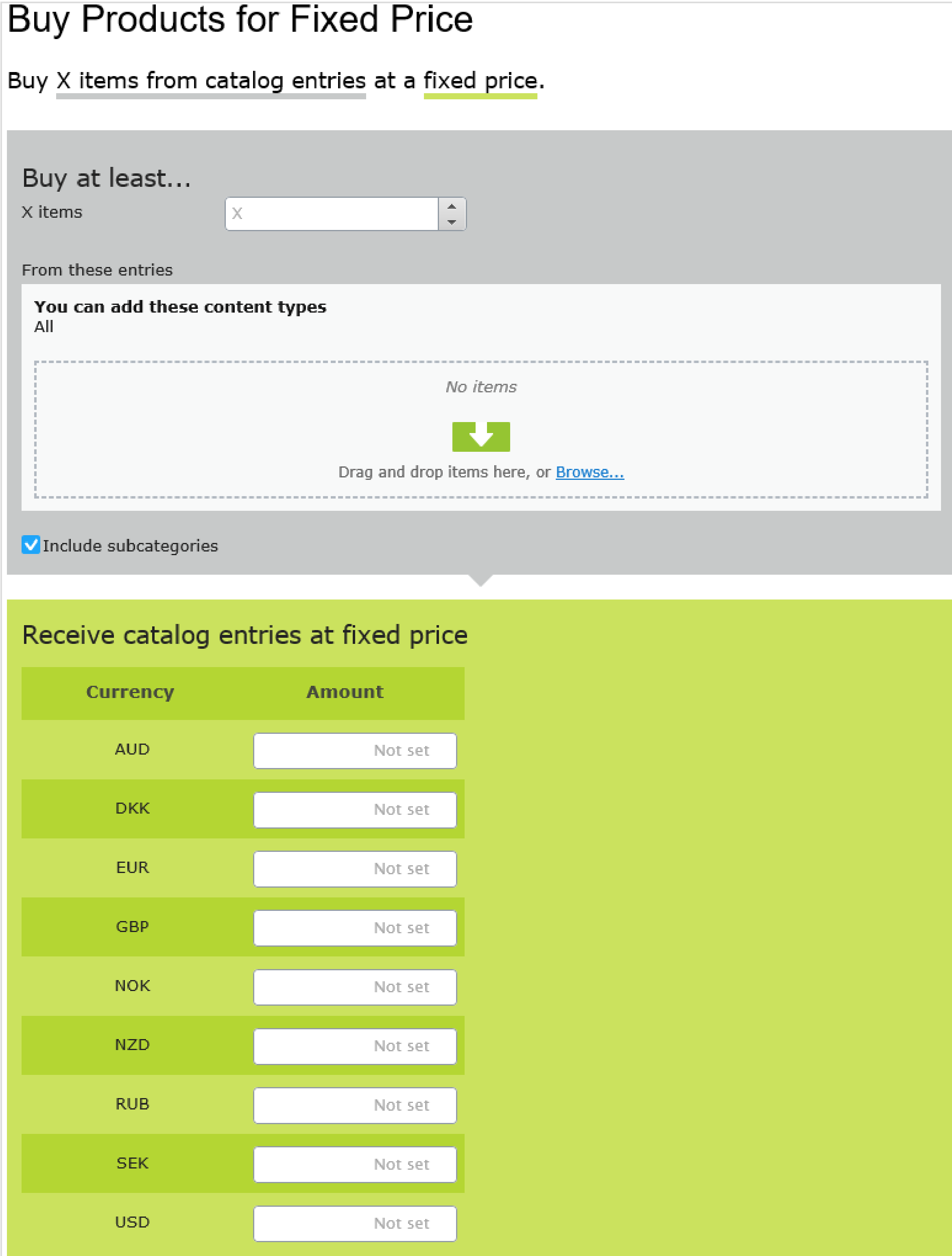
This discount supports multiples. That is, if a promotion is "buy at least 5 eligible items, and get the most expensive 1 item for free", and a customer buys 10 items, they get 2 free items. You can limit this factor by applying redemption limits.

Buy products for fixed price

Buy a fixed number of items from selected categories for a set price. For example, buy 3 men's shirts for £50.

The discount is applied only if the fixed price is less than the items' cost. For example, you create a fixed price discount: **Buy 2 from Top-Tunics for $250**.

- Buyer A selects two Top-Tunics items: $150 each, $300 total. In this case, the discount *is* applied, because the fixed price ($250) is less than the $300 total.
- Buyer B selects two Top-Tunics items: $100 each, $200 total. In this case, the discount is *not* applied, because the fixed price ($250) exceeds the $200 total.


Buy Products for Fixed Price
Buy X items from catalog entries at a fixed price.
Buy at least...
X items
X
From these entries
You can add these content types
All
No items
Drag and drop items here, or Browse...
Include subcategories
Receive catalog entries at fixed price
Currency
Amount
AUD
Not set
DKK
Not set
EUR
Not set
GBP
Not set
NOK
Not set
NZD
Not set
RUB
Not set
SEK
Not set
USD
Not set

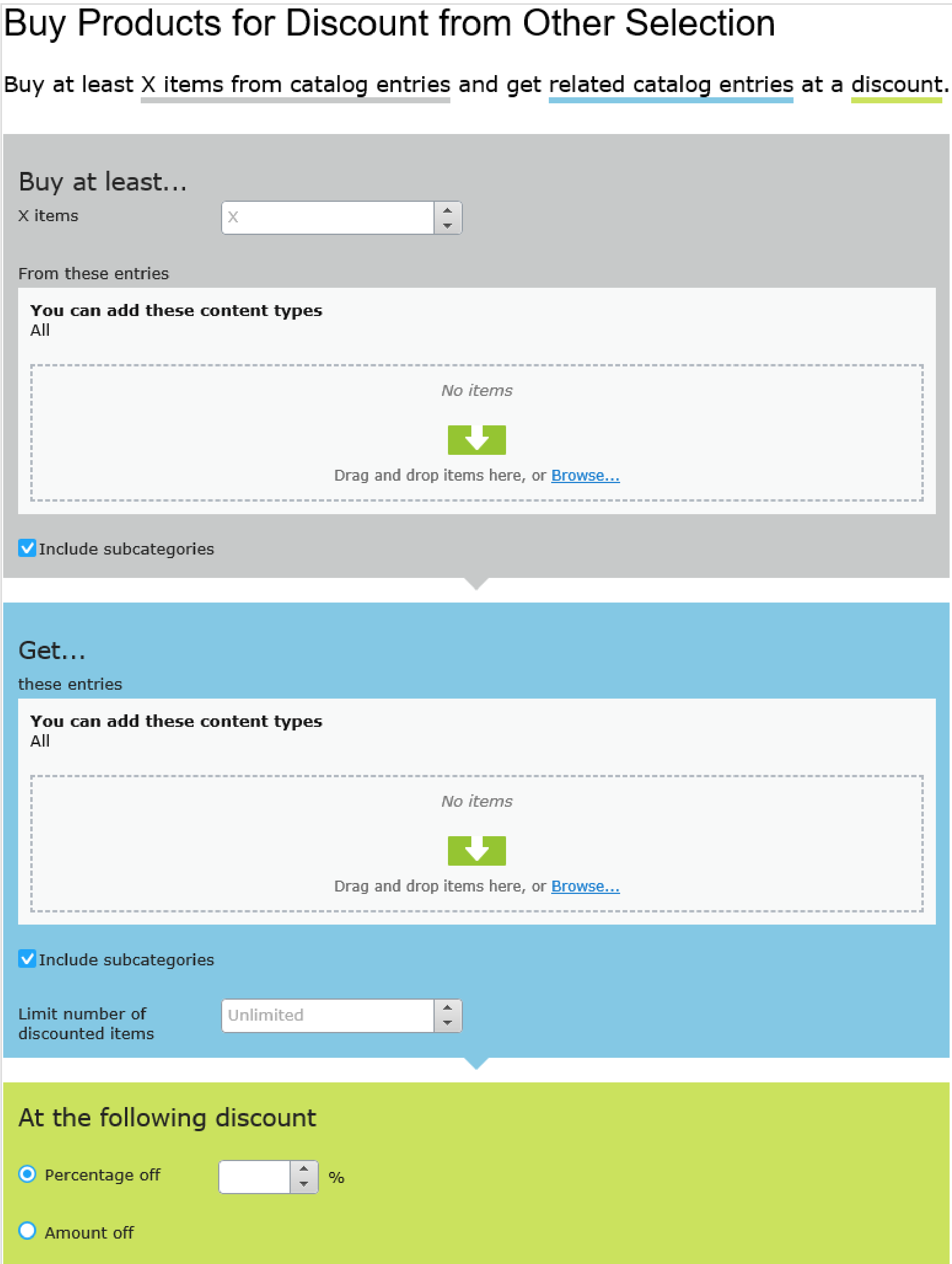
The view has two sections:

- **Buy at least X items…**. Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Receive catalog entries at fixed price**. For the above items, enter a fixed price for each currency. If no amount is entered for a currency, no discount is available for it.

> Note: The list of currencies is determined by the campaign's target market.

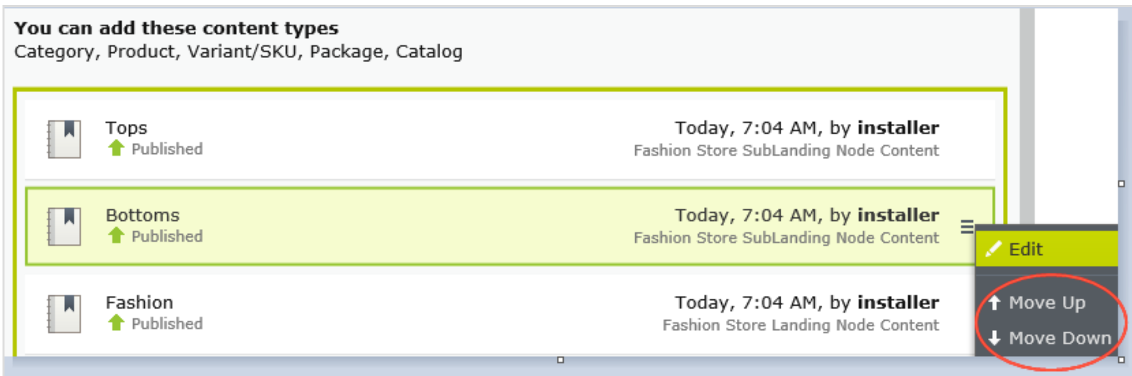
Buy products for discount from other selection

Buy a minimum amount from a group of items to get a discount on a second group of items. For example, customers who purchase a winter coat get a 30% discount on scarves, gloves, and hats. There is no relationship between the first set of items and the second.


Buy Products for Discount from Other Selection
Buy at least X items from catalog entries and get related catalog entries at a discount.
Buy at least...
X items
X
From these entries
You can add these content types
All
No items
Drag and drop items here, or Browse...
Include subcategories
Get...
these entries
You can add these content types
All
No items
Drag and drop items here, or Browse...
Include subcategories
Limit number of discounted items
Unlimited
At the following discount
Percentage off
%
Amount off

The view has three sections:

- **Buy at least X items....** Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Get... these entries**. Select items to be discounted. This area has a context-sensitive menu that includes **Move up** and **Move Down** options for each item. A product's position has no effect on how discounts are processed.

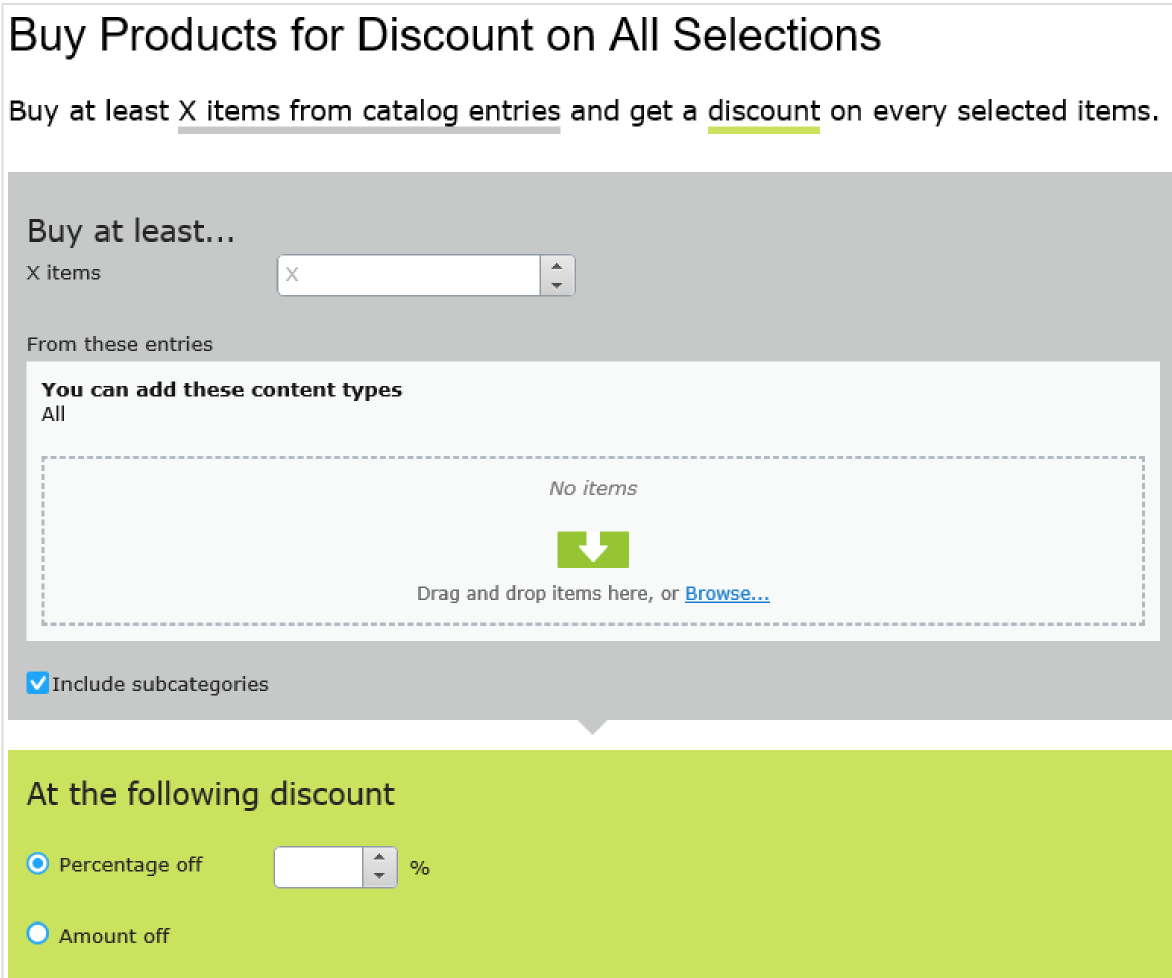


- **At the following discount**. Choose how to calculate the discount.
  - **Percentage off**. Enter the discount as a percentage of the items' cost.
  - **Amount off**. Enter a discount amount for each eligible currency. The discount is only available for currencies with amounts.

> Note: The list of currencies is determined by the campaign's target market.

Buy products for discount on all selections

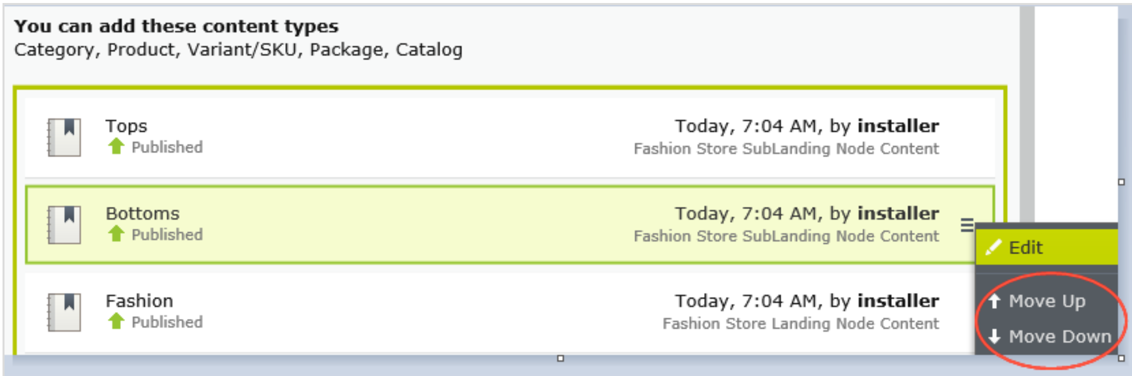
Buy a minimum number of selected items and get a discount on all items. For example, purchase 2 or more long-sleeved shirts and get a 15% discount on all long-sleeved shirts. The discount can be an amount or a percentage.



The view has these sections:

- **Buy at least X items...**. Enter the minimum number of items then the categories, products, and so on from which customers must pick. See also: Selecting discount-eligible items.

  This area has a context-sensitive menu with **Move up** and **Move Down** options for each item. A product's position has no effect on how discounts are processed.



- **At the following discount**. Choose how to calculate the discount.
  - **Percentage off**. Enter the discount as a percentage of the items' cost.
  - **Amount off**. Enter a discount amount for each eligible currency. The discount is only available for currencies with amounts.

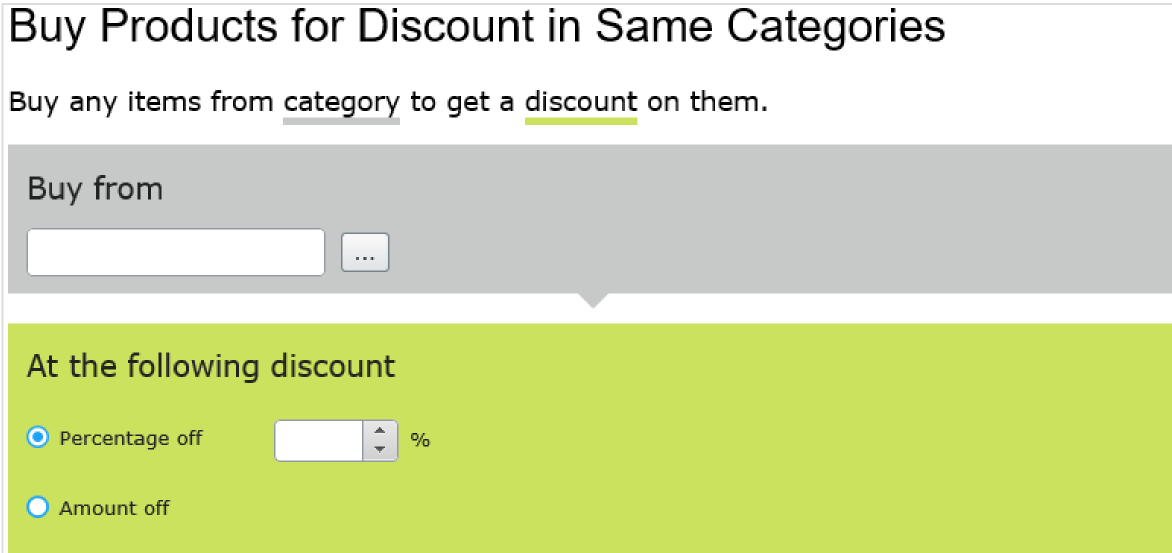
> Note: The list of currencies is determined by the campaign's target market.

Buy products for discount in same categories

When creating this discount, you select a category then a discount amount or percentage. The discount applies to all items in that category and its subcategories.

When calculating redemption limits, this discount counts each eligible item as 1. For example, if the order redemption limit is 5, and a shopper purchases 10 items in the selected category or subcategories, the discount only applies to 5 items. This is different from the way that Episerver Commerce typically handles redemption limits, where item quantity does not affect them.

How Episerver Commerce determines which items to discount explains what happens if only some items are discounted because a redemption limit is reached.



The view has these sections.

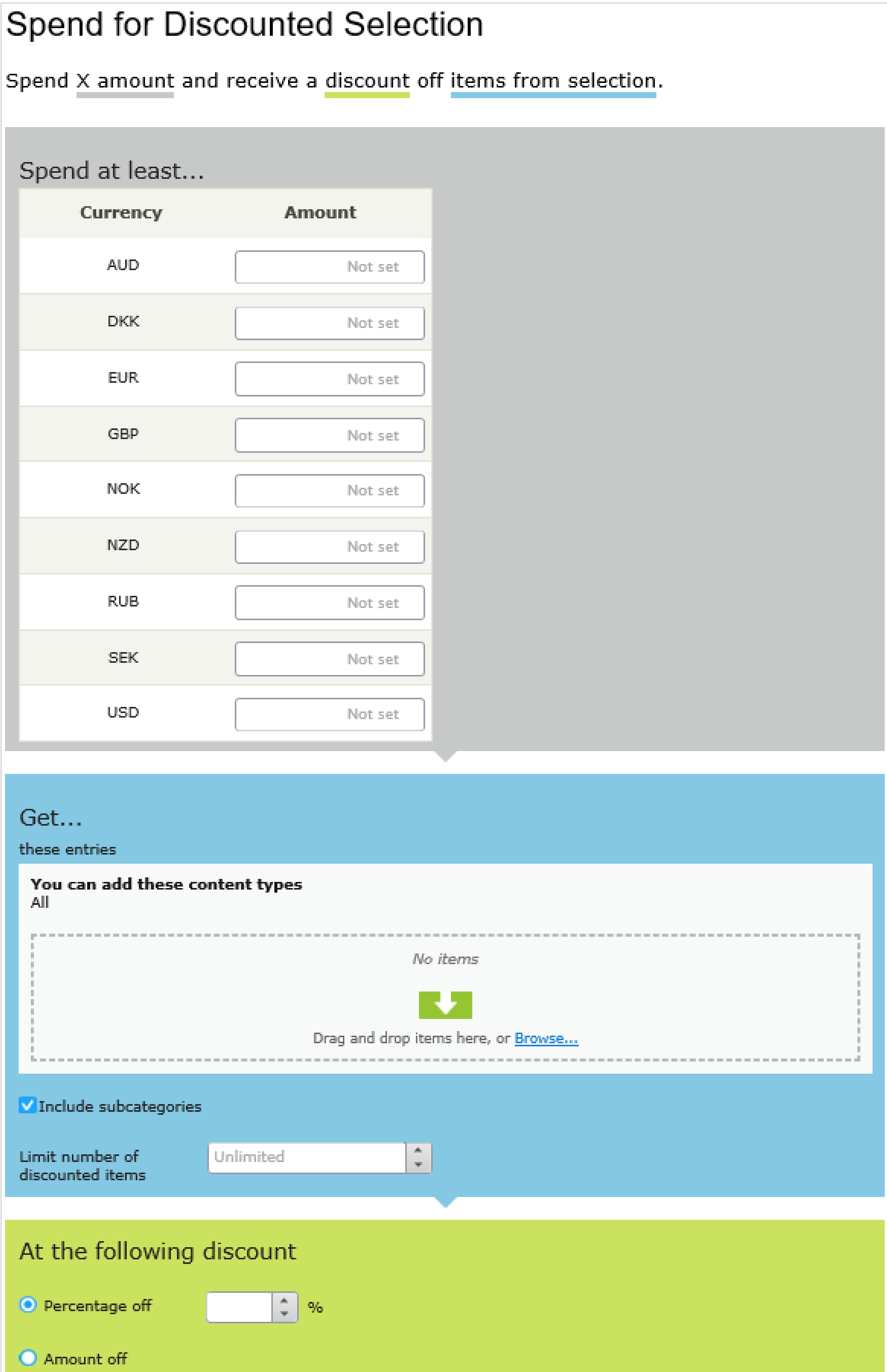
- **Buy from**. Select a category. All items in it and its subcategories are eligible for the discount.
- **At the following discount**. Choose how to calculate the discount.
  - **Percentage off**. Enter the discount as a percentage of the items' cost.
  - **Amount off**. Enter a discount amount for each eligible currency. The discount is only available for currencies with amounts.

> Note: The list of currencies is determined by the campaign's target market.

Spend for discounted selection

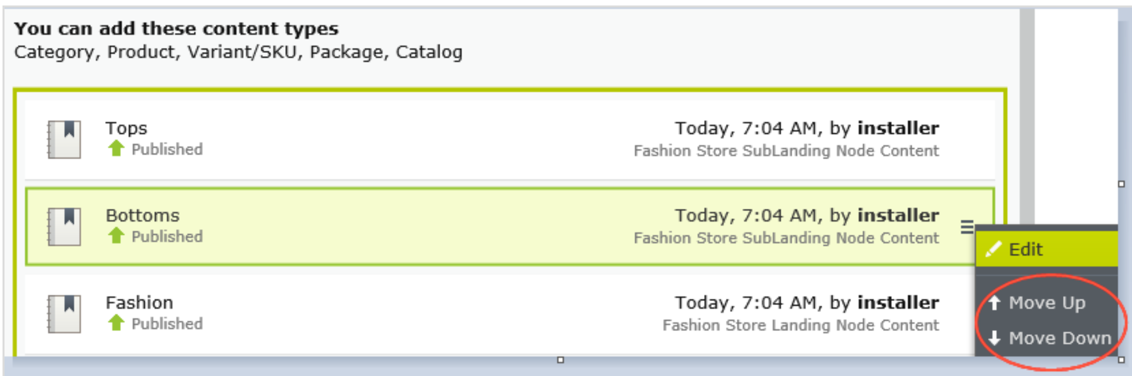
Spend a minimum amount to get a discount on selected items. For example, spend at least €100 and get 10% off all belts. The discount can be an amount or a percentage.

The second group of items is independent of the first group. You have total flexibility in determining both groups.


Spend for Discounted Selection
Spend X amount and receive a discount off items from selection.
Spend at least...
Currency
Amount
AUD
Not set
DKK
Not set
EUR
Not set
GBP
Not set
NOK
Not set
NZD
Not set
RUB
Not set
SEK
Not set
USD
Not set
Get...
these entries
You can add these content types
All
No items
Drag and drop items here, or Browse...
Include subcategories
Limit number of discounted items
Unlimited
At the following discount
Percentage off
%
Amount off

The view has three sections:

- **Spend at least...**. Enter a minimum order amount needed to qualify for the shipping discount. This section displays all currencies for the campaign's target market. Enter a minimum qualifying amount for each eligible currency. If no amount is entered, the discount is not available in that currency.
- **Get... these entries**. Select items to be discounted. This area has a context-sensitive menu that includes **Move up** and **Move Down** options for each item. A product's position has no effect on how discounts are processed.



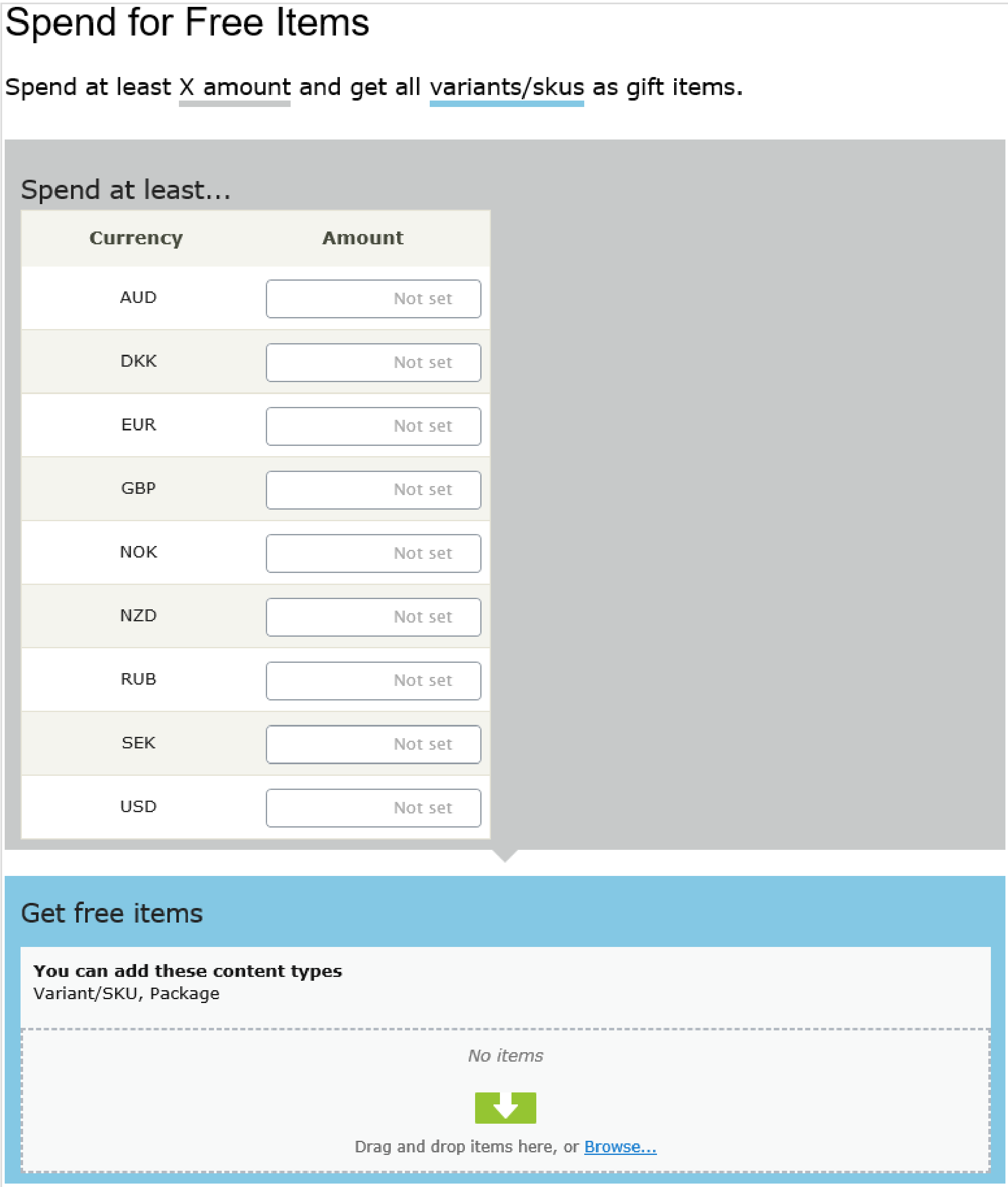
  - The **Get these entries** section also has a **Limit number of discounted items** drop-down that lets you set a maximum number of discount-eligible items, if desired. See also: How Episerver Commerce determines which items to discount.

- **At the following discount**. Choose how to calculate the discount.
  - **Percentage off**. Enter the discount as a percentage of the items' cost.
  - **Amount off**. Enter a discount amount for each eligible currency. The discount is only available for currencies with amounts.

> Note: The list of currencies is determined by the campaign's target market.

Spend for free items

Spend a minimum amount on an order and get free items.



The view has two sections:

- **Spend at least…**. Displays all currencies for the campaign's target market. Enter a minimum qualifying amount for each eligible currency. If no amount is entered, the discount is not available for that currency.
- **Get free items**. Select variants/SKUs or packages that are automatically added to an order when the minimum amount is spent.

  To give away the same product more than once, select it multiple times.

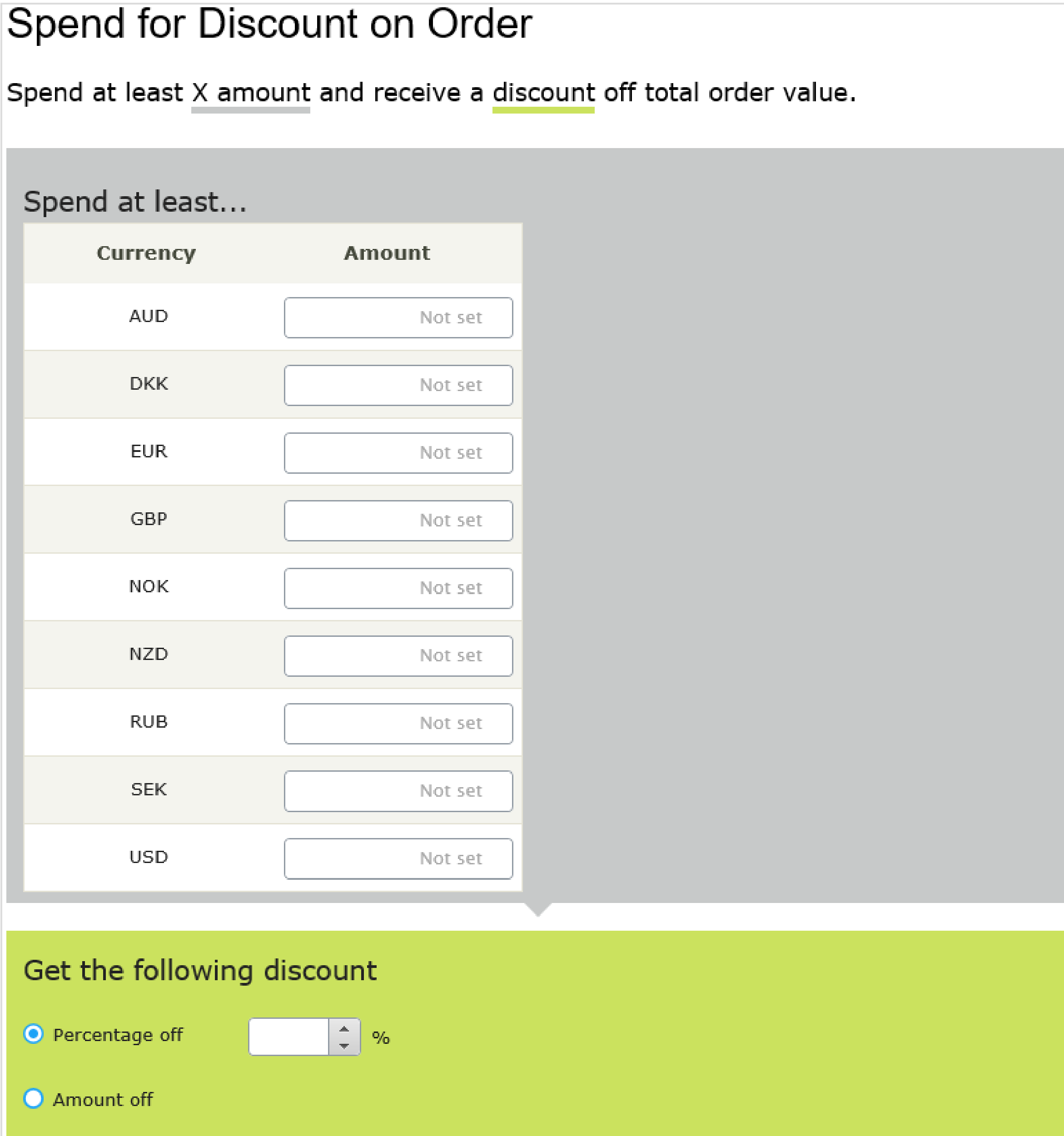
Order discounts

Spend for discount on order

Spend a minimum amount to get a discount on an entire order. For example, spend at least €100 and get 10% off the order total.

Shipping and taxes excluded from the calculation of the order total. Also, if other discounts are applied to an order before this discount which reduce the order total below the minimum, this discount is not applied.

> Note: With this discount, you typically set a redemption limit of 1 per order. See Applying redemption limits.
>
> For example, you create the discount "Spend at least $1000 and get $100 discount off total order amount" but set no redemption limits. If a customer purchases $2000 worth of items, a discount of $200 is applied. To limit the discount to $100, set a redemption limit of 1.



The view has two sections:

- **Spend at least...**. Define a minimum order value for each currency for which you want to provide a discount. If no amount is entered for a currency, no discount is available for it.

- **At the following discount**. Choose how to calculate the discount.
  - **Percentage off**. Enter the discount as a percentage of the items' cost.
  - **Amount off**. Enter a discount amount for each eligible currency. The discount is only available for currencies with amounts.

> Note: The list of currencies is determined by the campaign's target market.

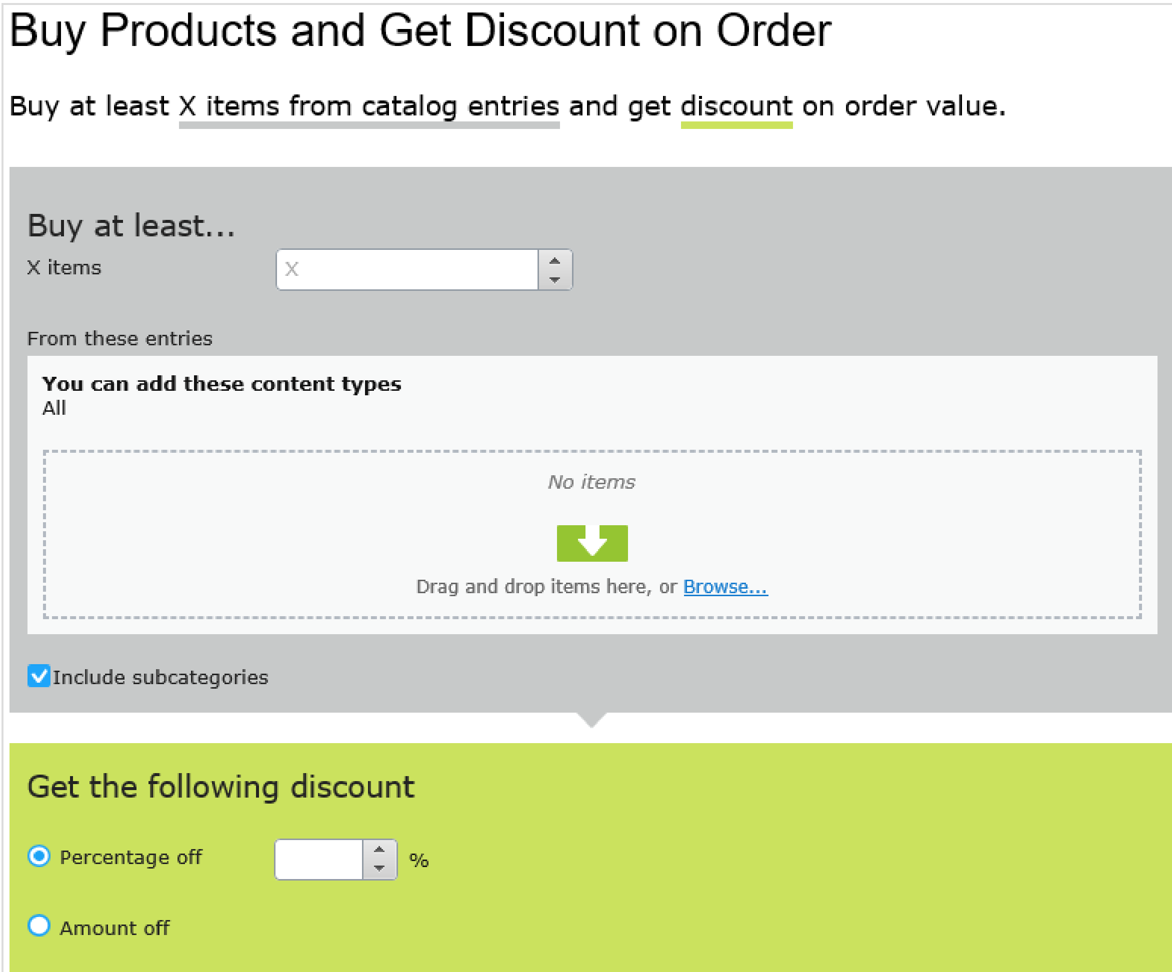
Examples

Spend at least $1000 and get $100 discount off total order amount.

- Customer buys a projector for $1000. There are no shipping costs or taxes. No other discounts or coupons are applied. Customer gets $100 discount, so order total is reduced to $900.
- Customer buys a tablet for $999. The order has a shipping cost of $20 and taxes of $10. Customer does not get the $100 discount because the order total (excluding shipping and taxes) is less than the minimum.
- Customer buys a laptop for $1010. There are no shipping costs or taxes. The order has a promotional code worth $50, which is applied before this discount. Since the adjusted order total, $960, is less than the minimum, the customer does not get the $100 discount.

Buy products and get discount on order

Buy a minimum number of products and reduce the cost of the order. You determine which products are eligible, and whether the discount is an amount or a percentage.



The view has two sections:

- **Buy at least X items…**. Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Get the following discount**. Define the discount as an amount or a percentage
  - If an *amount*, enter an amount for each currency for which you want to provide a discount.

    > Note: The list of currencies is determined by the campaign's target market.
  - If a *percentage*, it applies to all available currencies.

Shipping discounts

Spend for discount on shipping cost

Spend a minimum amount on an order and get discounted shipping costs. The discount can be an amount or a percentage. Also, you choose which shipping methods qualify.

> Note: With this discount, you typically set a redemption limit of 1 per order. See Applying redemption limits.
>
> For example, you create the discount "Spend at least $100 and get 25% off shipping cost" but set no redemption limits. If a customer purchases $200 worth of items, he gets a 25% discount for each $100, so a 50% discount. To limit the discount to 25%, set a order redemption limit of 1.

Spend for Discount on Shipping Cost

Spend at least X amount and receive a discount off selected shipping methods.

Spend at least...

Currency	Amount
AUD	Not set
DKK	Not set
EUR	Not set
GBP	Not set
NOK	Not set
NZD	Not set
RUB	Not set
SEK	Not set
USD	Not set

Get selected shipping methods...

- [x] AUS : Express-AUD
- [x] AUS : Fast-AUD
- [x] AUS : Regular-AUD

At the following discount

- (•) Percentage off %
- ( ) Amount off

The view has three sections:

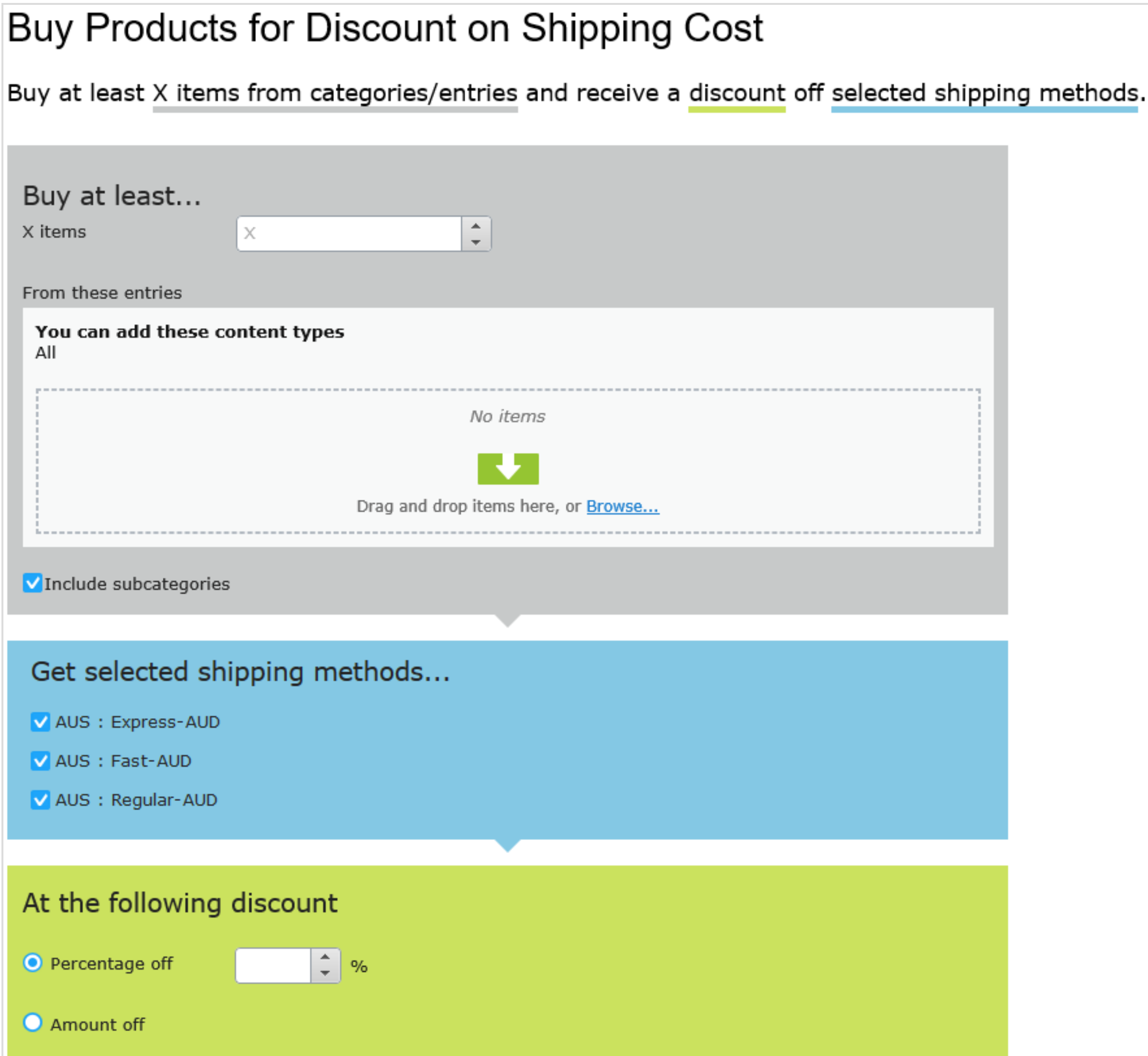
- **Spend at least.**. Enter a minimum order amount needed to qualify for the shipping discount. This section displays all currencies for the campaign's target market. Enter a minimum qualifying amount for each eligible currency. If no amount is entered, the discount is not available in that currency.
- **Get selected shipping methods...**. Select shipping method eligible for a discount. This section displays all enabled shipping methods for a campaign's target market. Preceding each method is its market.
- **At the following discount**. Choose how to calculate the discount.
  - **Percentage off**. Enter the discount as a percentage of the items' cost.
  - **Amount off**. Enter a discount amount for each eligible currency. The discount is only available for currencies with amounts.

> Note: The list of currencies is determined by the campaign's target market.

Buy products for discount on shipping cost

Buy a minimum number of items to get a reduction in shipping cost. For example, buy at least 3 shirts and get 25% off shipping. You determine which shipping methods are eligible, and whether the price reduction is an amount or a percentage.

> Note: With this discount, you typically set a redemption limit of 1 per order. See Applying redemption limits.
>
> For example, you create the discount "Buy at least three items and get 25% off shipping cost" but set no redemption limits. If a customer purchases six items, he gets a 25% discount for each three items, so a 50% discount. To limit the discount to 25%, set a redemption limit of 1.



The view has three sections:

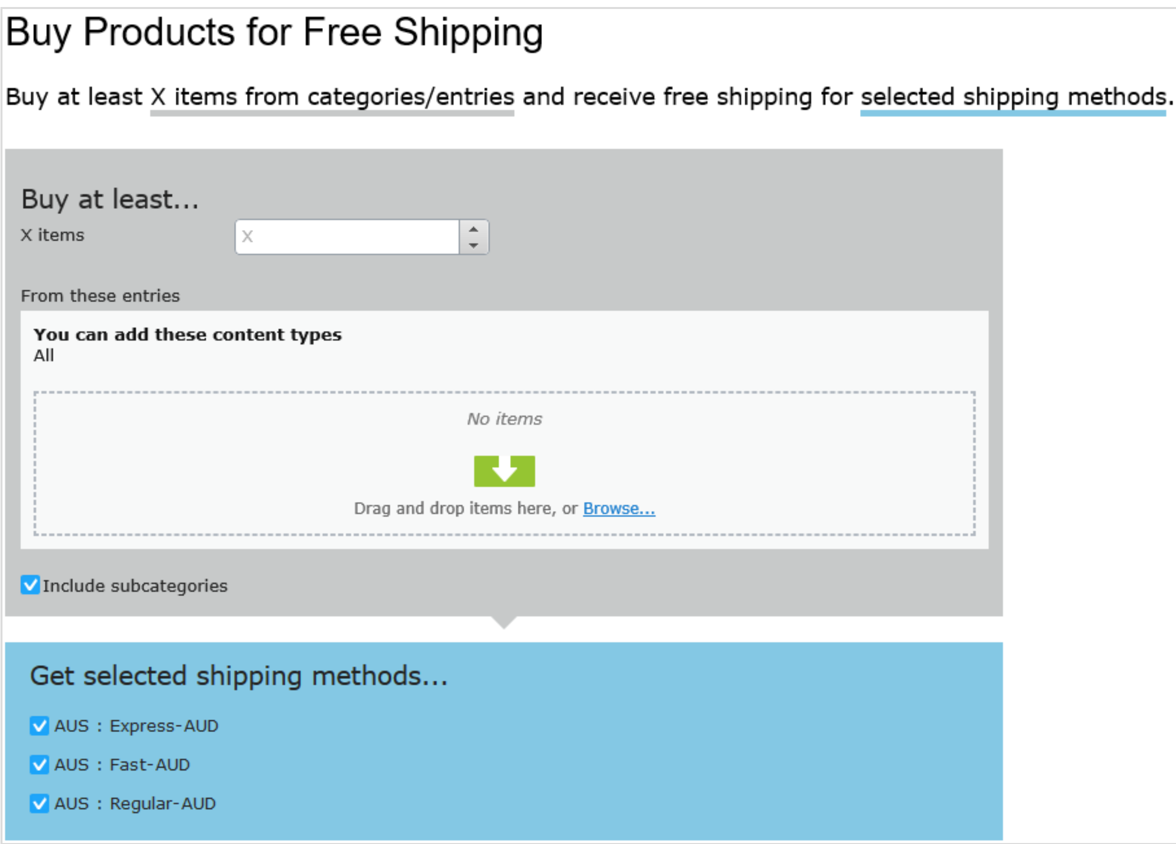
- **Buy at least X items....** Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Get selected shipping methods....** Select shipping method eligible for a discount. This section displays all enabled shipping methods for a campaign's target market. Preceding each method is its market.

- **At the following discount**. Choose how to calculate the discount.
  - **Percentage off**. Enter the discount as a percentage of the items' cost.
  - **Amount off**. Enter a discount amount for each eligible currency. The discount is only available for currencies with amounts.

> Note: The list of currencies is determined by the campaign's target market.

Buy products for free shipping

Buy a minimum number of items to get free shipping. For example, buy at least 3 ties and get free shipping. You determine which shipping methods are eligible.

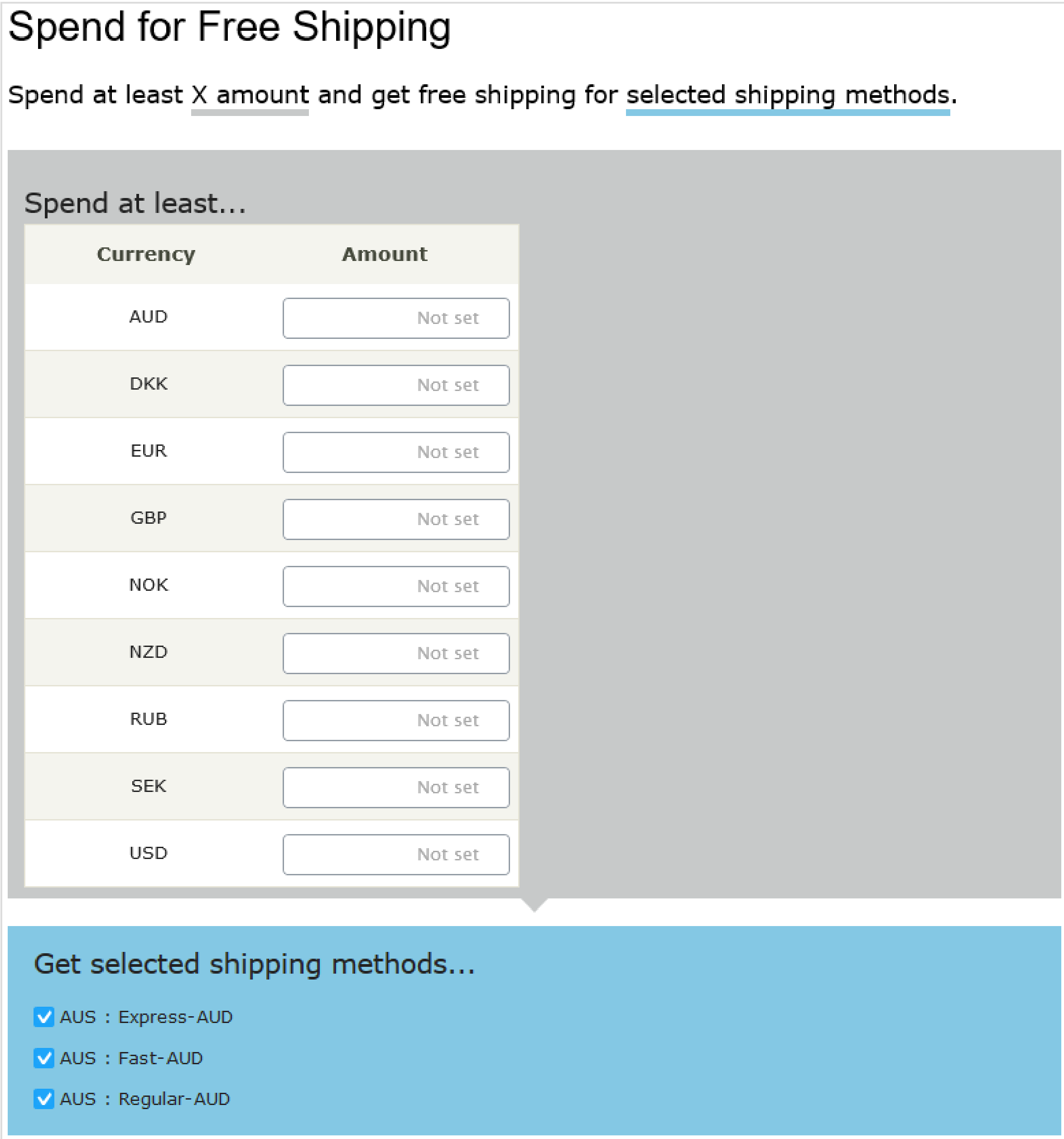


The view has two sections:

- **Buy at least X items…**. Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Get selected shipping methods…**. Select the shipping method that will be free with this discount. This section displays all enabled shipping methods for a campaign's target market. Preceding each method is its market.

Spend for free shipping

Spend a minimum amount of money to get free shipping. For example, spend $100 and get free shipping. You determine which shipping methods are eligible.



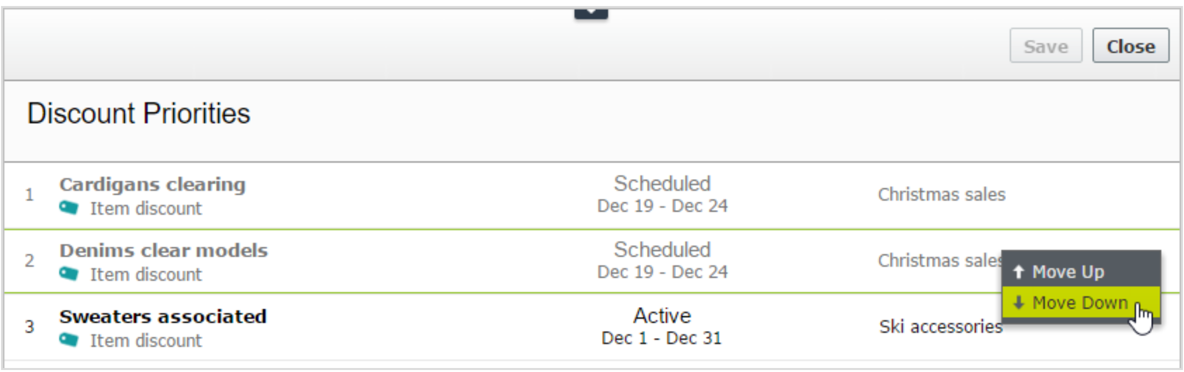
The view has two sections:

- **Spend at least...**. Enter a minimum order amount needed to qualify for free shipping. This section displays all currencies for the campaign's target market. Enter a minimum qualifying amount for each eligible currency. If no amount is entered, the discount is not available in that currency

- **Get selected shipping methods....** Select the shipping method that will be free with this discount. This section displays all enabled shipping methods for a campaign's target market. Preceding each method is its market.

Prioritizing discounts

Marketers often run multiple campaigns and discounts in parallel, with possible overlaps. The **Discount Priority** view lets you prioritize discounts, so you can determine the sequence in which active ones are applied. The view displays discounts in priority order (highest one at top), and includes all statuses (active, inactive, scheduled, and expired).



Adjusting discount priorities

From the Campaign view, click **Discount Priorities and Exclusions** in the top right .

To prioritize discounts, use the context menu or drag and drop them within the list. Click **Save** when done.

How prioritization works

- Only active discounts are applied.
- If multiple discounts apply to a product, the top active discount is applied first, followed by lower ones.
- If two discounts are excluded from being applied simultaneously, the higher priority discount is applied and the lower one is ignored. See also: Discount exclusions.

Examples

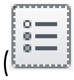
Assumption: Product's original cost is $100.

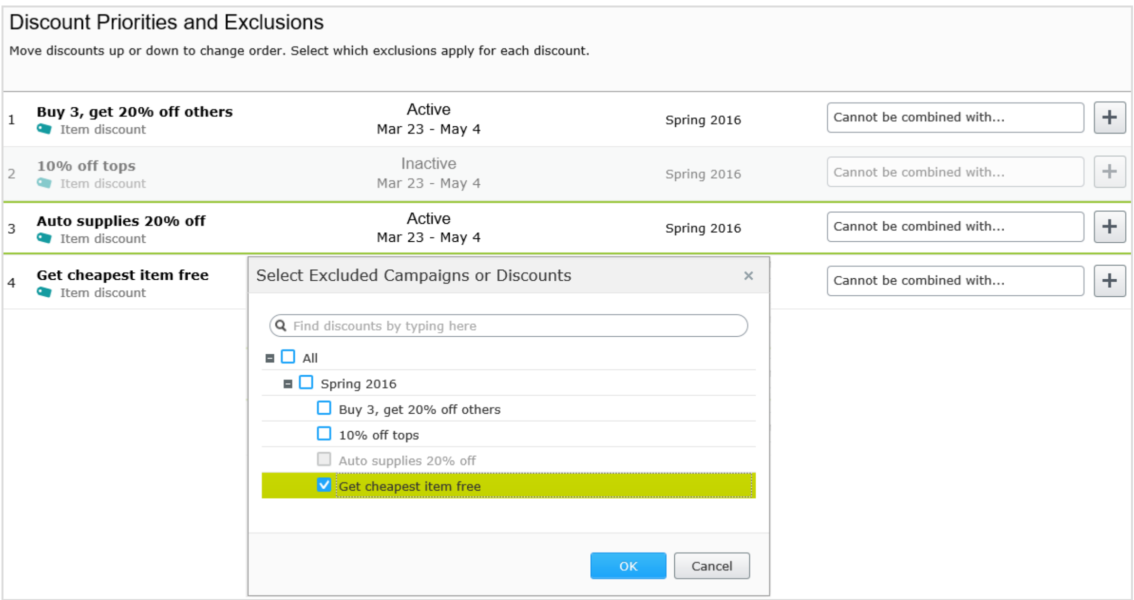
- **Example 1: Two discount percentages**
  - First discount: percentage 20%
  - First discount amount: $20
  - Adjusted price: $80
  - Second discount: percentage 30% (of $80)
  - Second discount amount: $24
  - Final adjusted price: $56
- **Example 2: Two discount amounts**
  - First discount: amount $20
  - Adjusted price: $80
  - Second discount: amount $30
  - Final adjusted price: $50
- **Example 3: One percentage, one amount**
  - First discount: percentage 20%
  - Adjusted price: $80
  - Second discount: amount $30
  - Final adjusted price: $50
- **Example 4: One amount, one percentage**
  - First discount: amount $30
  - Adjusted price: $70
  - Second discount: percentage 20%
  - Second discount amount: $14
  - Final adjusted price: $56

Discount exclusions

To any discount, you can apply *exclusions*: campaigns or discounts that cannot be combined with the current discount. You can apply an exclusion to individual discounts, all discounts in one more campaigns, or all other discounts.

For example, you are running a sale where automotive supplies are 20% off. Customers should not be able to combine this discount with the *Get cheapest item free* discount. To create this exclusion, follow these steps.

1. From Campaign view, click **Discount Priorities and Exclusions** in the top right ().
2. Select the discount to which you will apply exclusions. To continue the above example, select **automotive supplies 20% off**.
3. Click **Add +** to the right of the **Cannot be combined with...** field.

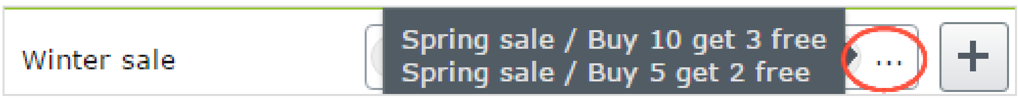


4. Select campaigns or discounts that cannot be combined with the one selected in step 2. To continue the above example, select the **Get cheapest item free** discount.
5. Click **Save** then **Close**.

Additional notes about exclusions

- You can apply an unlimited number of exclusions to a discount.
- If you select a campaign, you exclude *all* of its discounts, both current *and* future.
- The **Cannot combine with** field
  - After you select an exclusion, it appears in the **Cannot combine with** field for reference and possible removal.
  - The **Cannot combine with** field displays campaigns first, followed by discounts.
  - If you select **All** (the campaign root folder), only that tag appears in the **Cannot combine with** field.

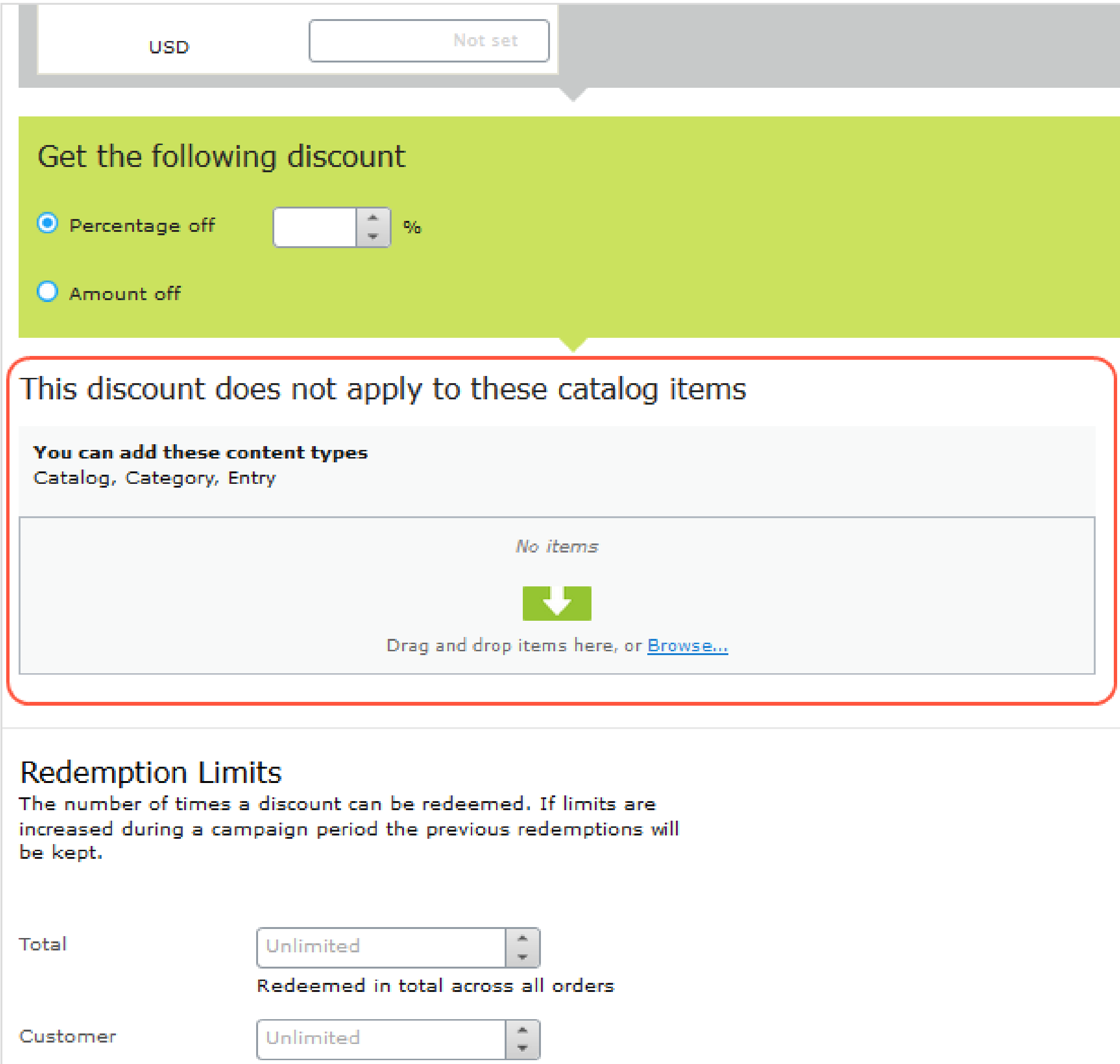
- Similarly, if you exclude a discount then later exclude its parent campaign, the discount's tag is removed from the **Cannot combine with** field. This is because the parent campaign includes the child discount.
- If more than two items are excluded, an ellipsis in the **Cannot combine with** field indicates additional entries. To view all exclusions for that discount, click **Add** or hover over the ellipsis.



Exclude catalog items from a discount

This topic explains how to exclude catalogs, categories, or catalog entries from a specific discount. For example, you want to exclude men's Puma sneakers from a store-wide 25% off sale.

1. Select the campaign then the discount to which you want to apply the exclusion.
2. On the **Edit Discount** view, scroll down to **This discount does not apply to these catalog items**.
3. Choose one or more catalogs, categories, or catalog entries to exclude from the discount.

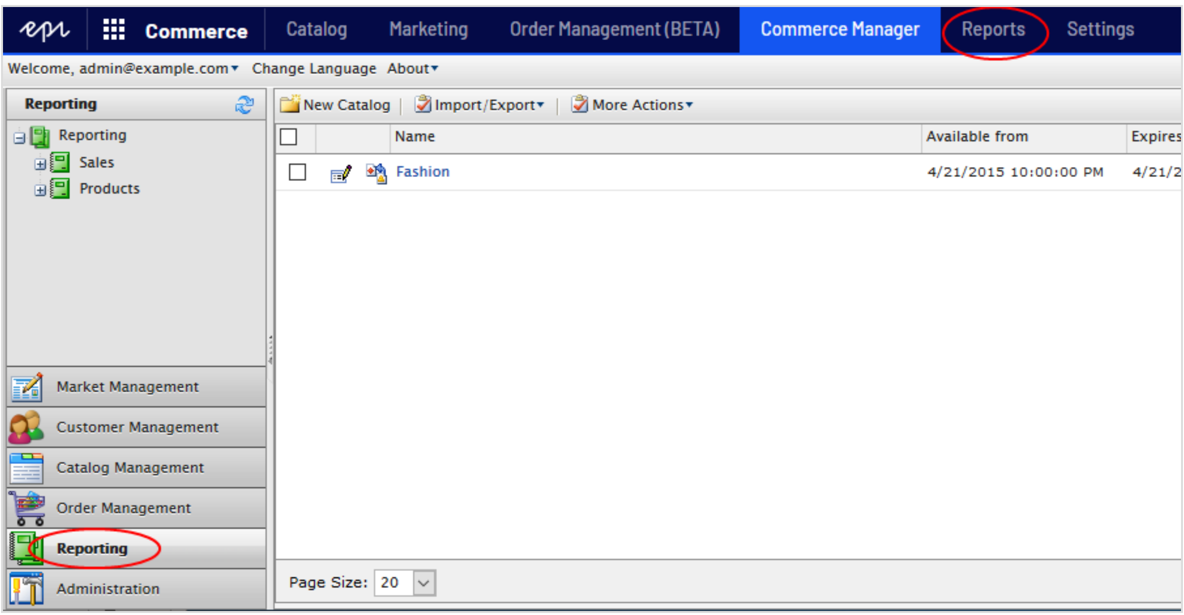


Campaigns (Legacy)

Since the new Campaigns and Discounts system has been available since September, 2016, this Legacy section is being retired. If you want to read the Campaigns (Legacy) documentation, see version 18-5, or earlier, of the user guide.

Reporting

Episerver Commerce provides reports within Commerce Manager as well as from the **Reports** main menu option.



Commerce manager reports

By default, the Commerce Manager user interface provides a set of common types of reports.

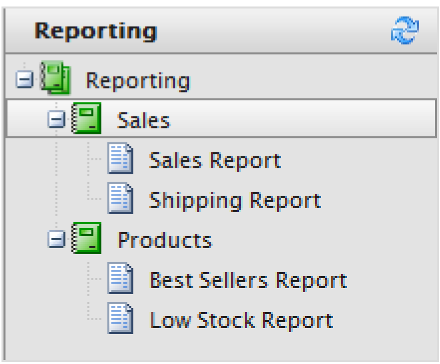
- **Sales Report**. Website sales performance over a time period.
- **Shipping Report**. The shipping method, number of orders, and total shipping cost over a time period.
- **Best Sellers Report**. Products that sell most in terms of quantity and total revenue over a time period.
- **Low Stock Report**. Products that are low in inventory, reported when a product's inventory is less than its reorder minimum quantity.

You can also develop custom reports. See Episerver World.

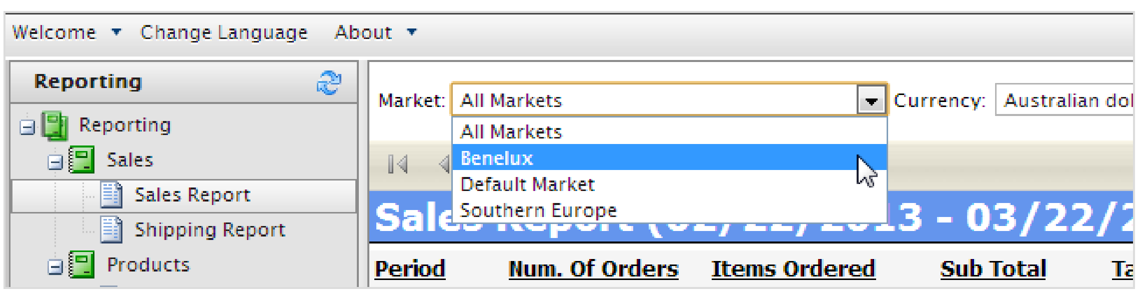
Managing reports

You can do the following tasks with a Commerce report:

- Generate a report by clicking **Reporting** and select one of the default reports available under **Sales** and **Products**: **Sales Report**, **Shipping Report**, **Best Sellers Report** or **Low Stock Report**. The report display is generated.



- Filter a report by date, time, currency, and markets by selecting **Market**, **Currencies** and set the **Start Date** and **End Date** ranges and time. You can also group the report data by **Day**, **Month**, or **Year**. Click **Apply Filter** to filter; click **reload** to regenerate the report after changing the filtering.



- Export a report by selecting **Select a format** > **Export** > **Open** or **Save**. You can export to Excel or PDF.
- Print a report by clicking **Print**.

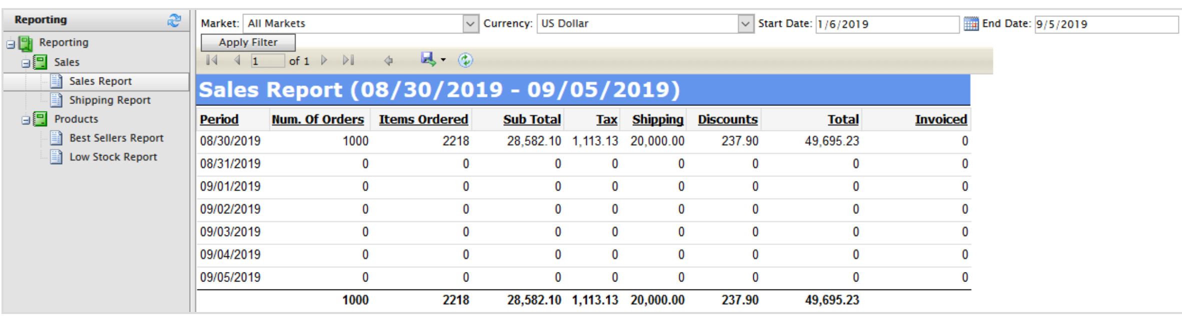
Main menu reports

Sales By Day report (Beta)

> **Note:** This is a Beta feature, which means that it is still in development. Developers can read about how to enable Beta features here.

This report shows the following Episerver Commerce order information for each day. To learn about how this data is collected, see Collect data for reports (Beta).

To compile the data used in this report, run the Collect report data scheduled job.



Period	Num. Of Orders	Items Ordered	Sub Total	Tax	Shipping	Discounts	Total	Invoiced
08/30/2019	1000	2218	28,582.10	1,113.13	20,000.00	237.90	49,695.23	0
08/31/2019	0	0	0	0	0	0	0	0
09/01/2019	0	0	0	0	0	0	0	0
09/02/2019	0	0	0	0	0	0	0	0
09/03/2019	0	0	0	0	0	0	0	0
09/04/2019	0	0	0	0	0	0	0	0
09/05/2019	0	0	0	0	0	0	0	0
	1000	2218	28,582.10	1,113.13	20,000.00	237.90	49,695.23	

Report information

- Date: The order's creation date
- Market, Currency: The order's market and currency. For each combination of market and currency, the following data is provided for the displayed date.
  - The number of orders
  - The number of items in those orders
  - Subtotal (quantity x placed price - entry discount amount)
  - The tax amount for those orders
  - The shipping amount for those orders
  - The discount amount for those orders
  - Total: Total amount spent on those orders (Subtotal + Tax + Shipping Total - Discounts)

Administration

> **Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

You can configure and administer Episerver Commerce through general settings for the entire system, and specific settings for parts of the system, such as Catalog and Order management.

> **Note:** Languages supported by Episerver Commerce are added from the Episerver CMS admin and edit views, as described in Managing website languages in the CMS Administrator User Guide.

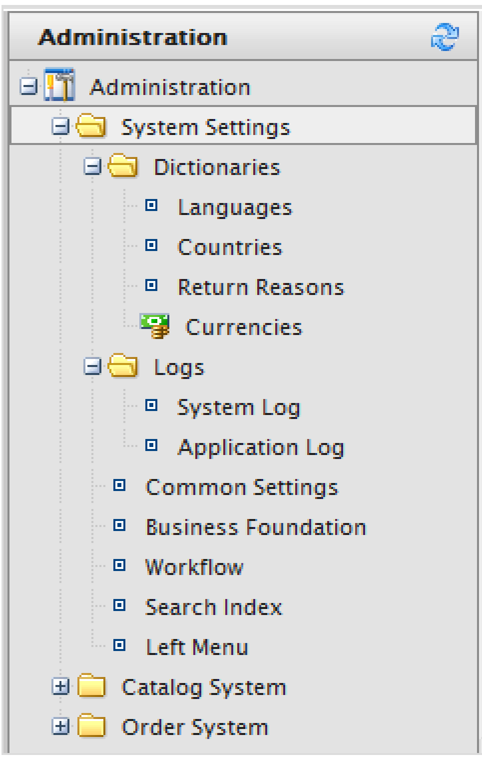
You can do the following from the administration interface:

- Add countries, currencies, and return reasons to the e-commerce system, which is done through Dictionaries.
- Track changes and monitor system activities through the log features.
- Configure common settings such as default language, currency, and length and weight units to be used by Episerver Commerce.
- Customize, create and publish business objects to extend the attributes of the Customer Management system, and provide more flexibility for fields and attributes displayed and collected.
- Update the search index for the website to reflect changes to the product catalog.
- Customize the left menu by adding your own menu items.
- Define warehouses, tax categories, and meta-classes and meta-fields used by the **Catalog Management** system.
- Define payment gateways, shipping methods and providers, and configure taxes used by the Order Management system.
- Manage Commerce-specific scheduled jobs from the Episerver CMS Admin view, as described in Scheduled jobs.

System settings

> **Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

You can set language, currency, units and metadata fields and classes, and many other possible configurations by selecting **Administration** > **System Settings**.



> **Note:** You add languages in Episerver Commerce from the Episerver CMS administration and edit views, as described in Managing website languages in the CMS Administrator User Guide.

Dictionaries

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

Dictionaries and dictionary values enrich data when you work with currencies, countries, customer organization, customer contact groups, return reasons, and catalog content.

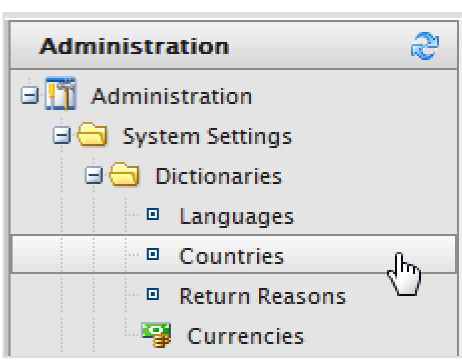
> Note: You add languages in Commerce from the Episerver CMS admin and edit views, as described in Managing website languages in the CMS Administrator User Guide.

Adding a country to dictionaries

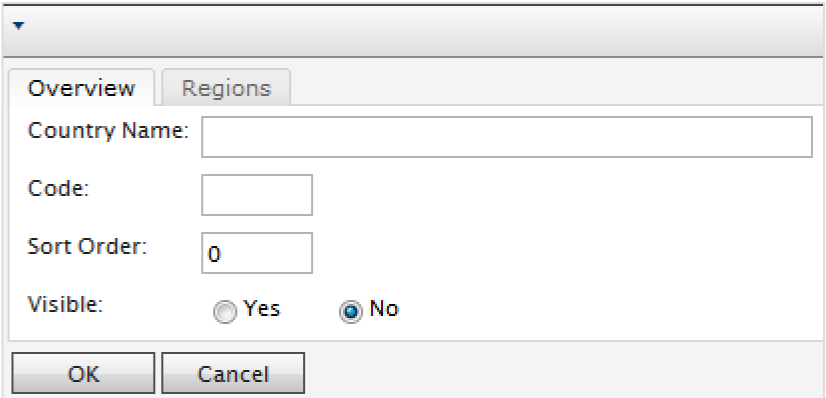
> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

A country helps to define a market.

1. Open Commerce Manager and go to **Administration** > **System Settings** > **Dictionaries** > **Countries**.



2. Click **New Country** and fill in the following:
   - **Overview** tab



     - **Country Name**. Enter a name of the country.
     - **Code**. Enter the country code, which you can get from the MSDN site Table of Country/Region and State/Province Names and Codes [C++] (use the ISO Short Code or ISO Long Code as long as you remain consistent).
     - **Sort Order**. Enter a number starting from 0 (the lower number is listed at the top).
     - **Visible**. Select **Yes** to make the country name visible on the public site; otherwise **No**.

   - **Regions** tab

     - **New Region Name**. Enter a name, such as CA, to identify a state, province, or prefecture. Then click **Add**. You can also select whether the region name is **Visible** on the public site.

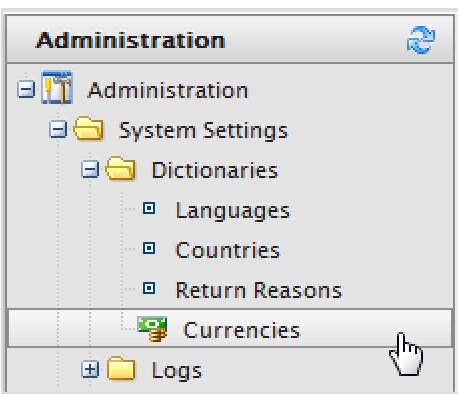
       When you click **Edit**, you can change the **Ordering** of the region. Click **Update** to save those changes.

Adding a currency to dictionaries

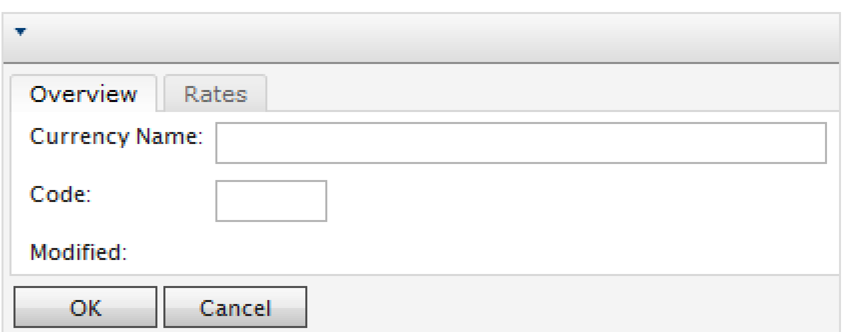
> **Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

A currency helps to define a market and for catalog.

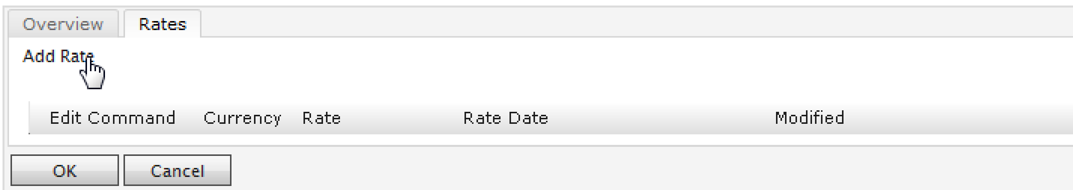
1. Open Commerce Manager and go to **Administration** > **System Settings** > **Dictionaries** > **Currencies**.



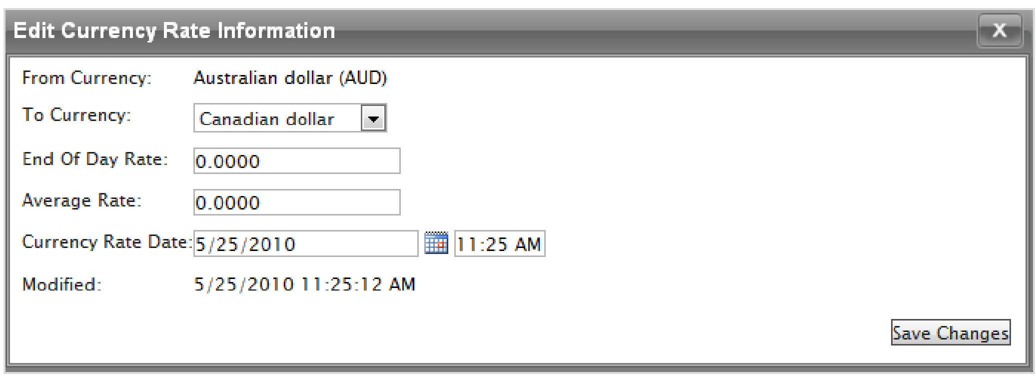
2. Click **New Currency**. The Currency **Overview** tab appears.



- **Overview** tab
  - **Currency Name**. Enter the name of the currency that shows on the public site and various Commerce Manager administration pages.
  - **Code**. Enter the currency code, which you can get from https://en.wikipedia.org/wiki/ISO_4217#Active_codes.
- **Rates** tab



  - **Add Rate**. Select to add a foreign exchange rate when you want to convert from one currency to another. The **Edit Currency Rate Information** dialog box appears.



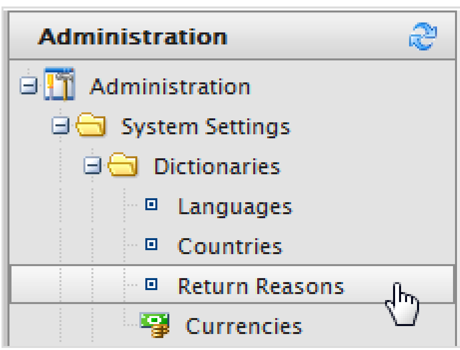
    - **From Currency**. Displays the current currency.
    - **To Currency**. Select the currency to which you want to convert from the current currency.
    - **End of Date Rate**. Enter the end-of-day rate.
    - **Average Rate**. Enter the average rate.
    - **Currency Rate Date**. Enter a currency rate date.

3. Click **Save Changes**.

Creating a return reason

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

Return reasons add data about return in the order management process. The built-in return reasons in Episerver Commerce are **Faulty**, **Incorrect Item**, and **Unwanted Gift**. You can add more return reasons.



1. Open Commerce Manager and go to **Administration** > **System Settings** > **Dictionaries** > **Return Reasons**. The **Return Reasons** screen appears.
2. Click **New Return Reason**. The **Return Reason Edit** dialog box appears.
   - **Return Reason**. Enter a name, such as *Changed Mind*.
   - **Sort Order**. Enter a number. The lower the value, the higher the position the return reason is on the list screen.
   - **Visible**. Select **Yes** to enable to return reason; otherwise **No**.
3. Click **OK**. The new return reason appears on the list.

Deleting a return reason

- To delete an individual return reason, click **Delete**.
- To delete multiple return reasons at one time, select the check boxes next to the return reason and select **More Actions** > **Delete Selected**. Click **OK** to confirm.

Logging

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

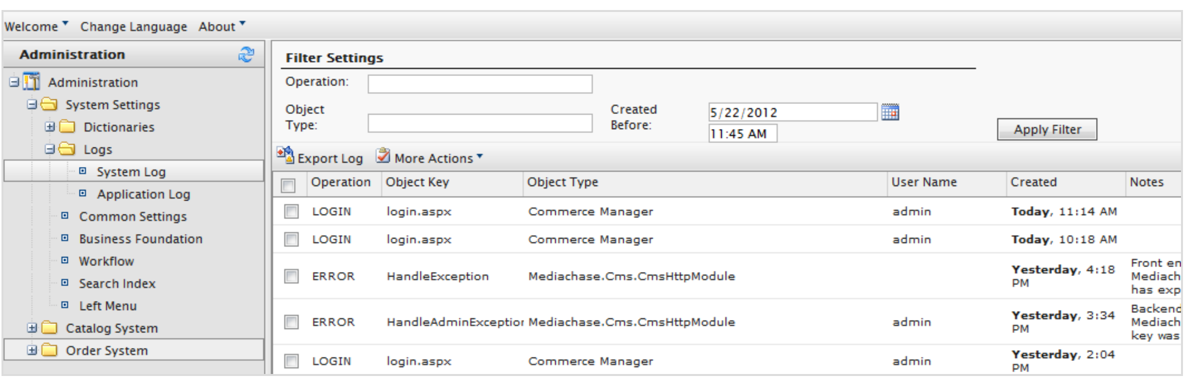
Logs contains the system log and application log. These logs track the activities within the Episerver Commerce system specifically. This is useful when troubleshooting, and to track events and changes in the system during a specific time period.

> Note: There is also a change log for tracking changes to content in the system. See Change Log in the Administrator User Guide.

To access the logs, open Commerce Manager and go to **Administration** > **System Settings** > **Logs**.

System log

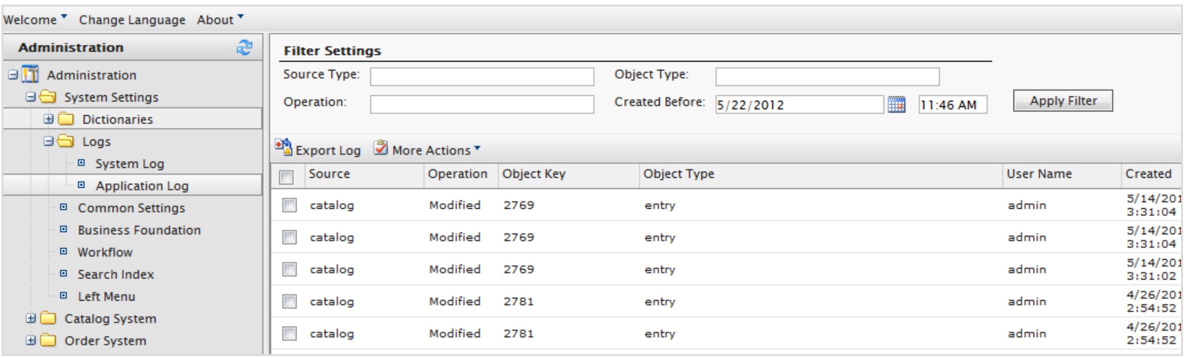
This log tracks system-related activities within Episerver Commerce.



- Filter the logs by **Operation**, **Object Type**, or the **Created Before** date and time and click **Apply Filter**.
- Click **Export Log** to move the content of your filtered records to a csv file.
- Select **More Actions > Delete Selected** or **Delete All** to remove log items.

Application log

This log tracks changes made in the Catalog management system. For example, when you add a SKU to a catalog, it gets logged.

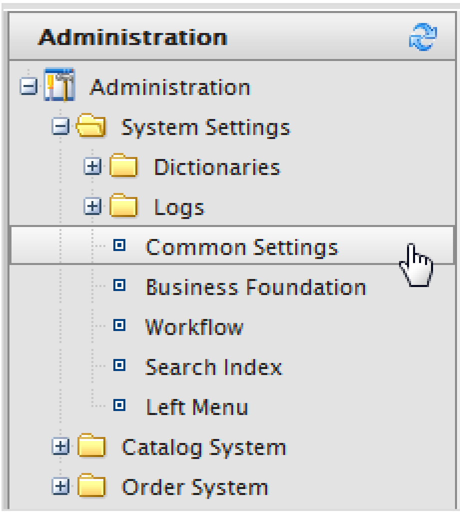


- Filter the logs by **Source Type**, **Operation**, **Object Type**, or the **Created Before** date and time and click **Apply Filter**.
- Click **Export Log** to move the content of your filtered records to a csv file.
- Select **More Actions > Delete Selected** or **Delete All** to remove log items.

Common settings

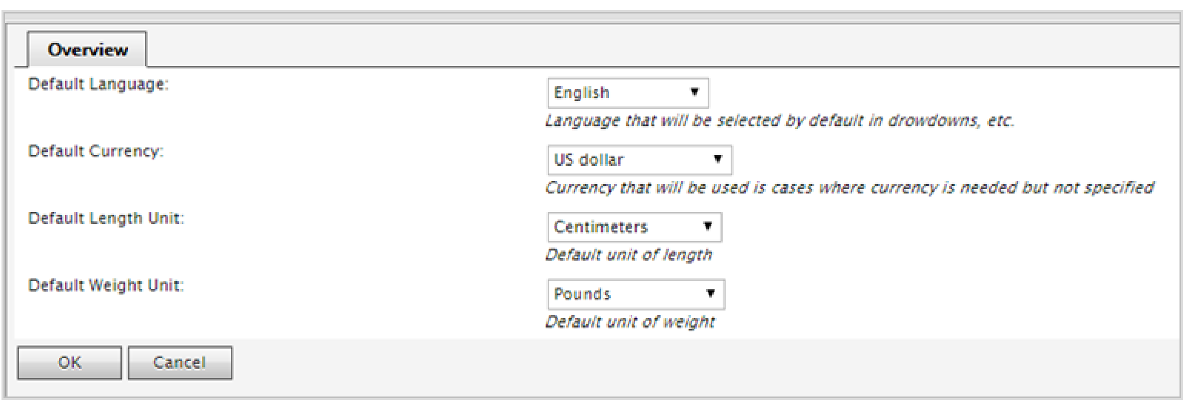
> **Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

Open Commerce Manager and go to **Administration** > **System Settings** > **Common Settings** to select your default language, currency, length unit, and weight unit.



You have the following options:

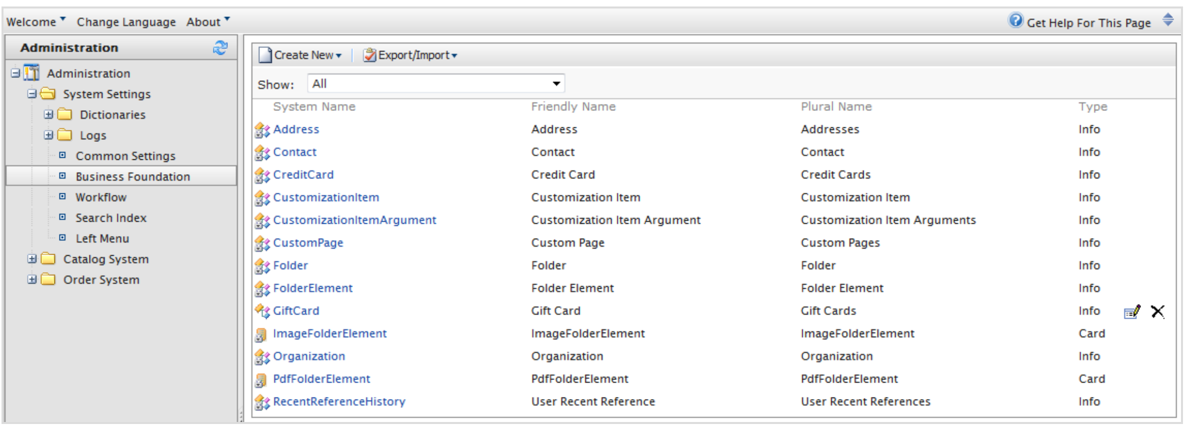
- **Language**. Select from the available languages as defined in the language settings. See also: Multi-language management.
- **Currency**. Select from the available currencies as defined in the currency settings.
- **Length units**. Select **Centimeters** or **Inches**. Length settings are used for calculating shipping costs.
- **Weight units**. Select **Kilograms** or **Pounds**. Weight settings are used for calculating shipping costs.



Business foundation

> **Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

Business Foundation extends the attributes of the Customer and Asset Management systems to give you more flexibility with the displayed and collected fields and attributes. Business Foundation works with the metadata engine to allow no-code customization of the data mode with which you can define new objects and relations between these for the Customer Management system.



You can define the layout of customizable forms and specify the fields you want to display. You can also work with system fields. For example, you can set a standard height and width for an image that is uploaded to the Asset Management system, or create a **Gift Card** field in the Customer Management system to track how much money a customer has on a gift card.

> **Note:** Business Foundation only supports the Customer and Asset Management subsystems. The Asset Management subsystem in Commerce Manager was replaced by the Episerver Asset system.

Creating a business object

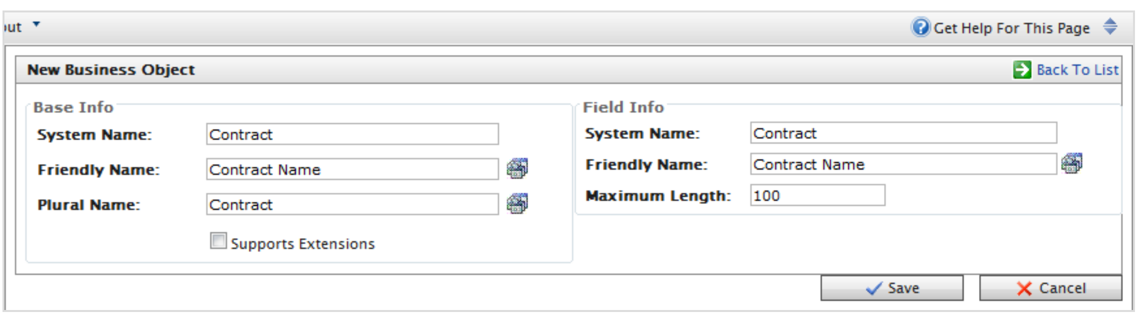
> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

A business object extends customer and asset forms to track and relate types of data. You can create a new business object to support customized business scenarios. The following example shows how to create a Contract business object.

Creating a contract business object

Do the following to add a contract business object:

1. Open Commerce Manager and go to **Administration** > **System Settings** > **Business Foundation**. The **Business Foundation Configuration** page appears.
2. Click **Create New** and click **New Business Object**. The **New Business Object** dialog box appears.



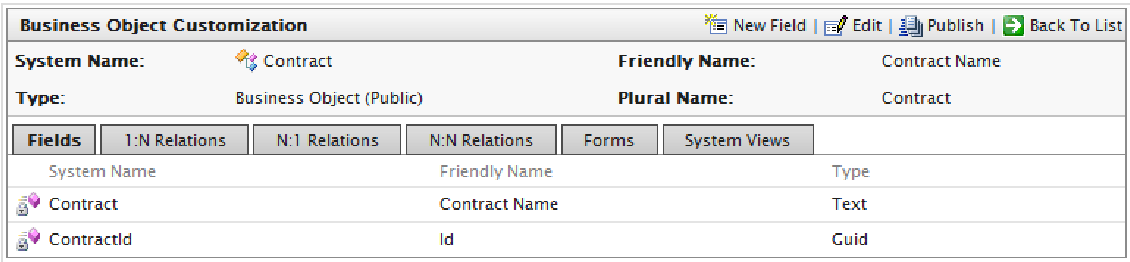
Base Info

- **System Name**. Enter the name of the business object, after which the Friendly Name and Plural Name fields are automatically populated.
- **Friendly Name**. Alternative to the System Name.
- **Plural Name**. Plural version of the system or friendly name, such as *inventories*.
- **Supports Extensions**. Select the check box to extend an existing meta-class with extra properties. For example, you can extend a download class with **imagedownload**, which contains extra parameters such as height and width.

Field Info

- **System Name**. Enter a system name.
- **Friendly Name**. Enter an easy-to-understand name.
- **Maximum Length**. Enter the maximum number of characters allowed in this field.

3. Click **Save**. The details of your newly created business object appear.



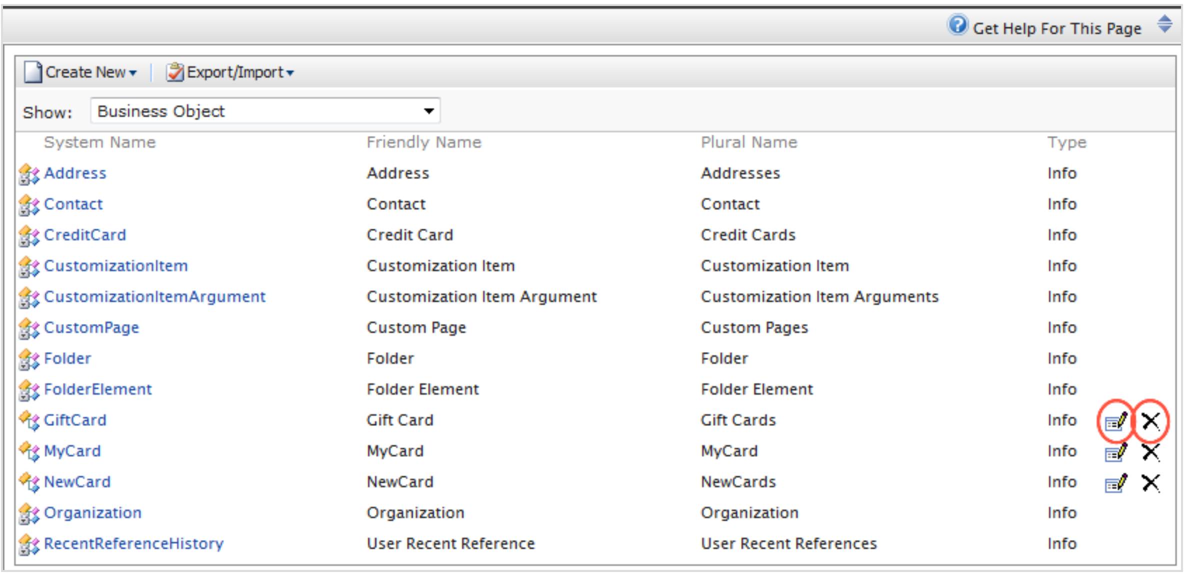
Customizing a business object

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

A good starting point to model business objects for your needs is to customizing an existing business object. Episerver Commerce includes a number of business objects that you can edit and customize.

Editing an existing business object

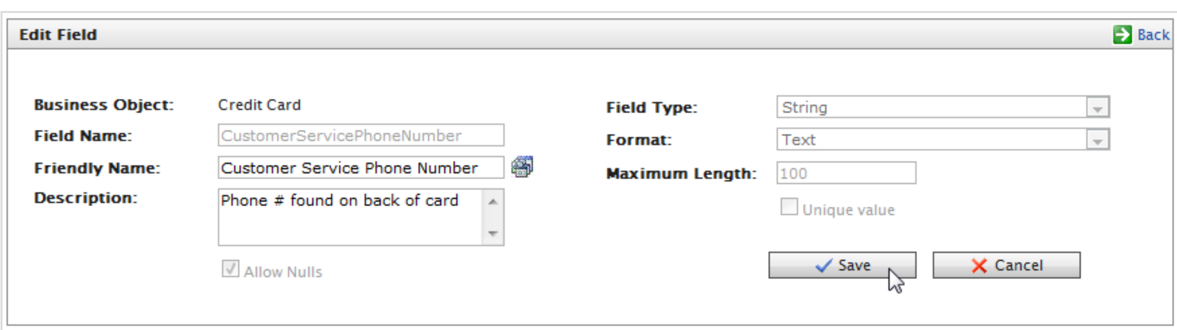
You can edit and delete many, but not all, default business objects and related fields. For example, you can edit but cannot delete the **Address** and **Organization** business objects. Business objects that you can edit and delete have an **Edit** and **Delete** icon next to them.



Editing an existing field of a business object

You can edit or delete fields that have an **Edit** and **Delete** icon next to them.

You cannot edit locked fields such as **Field Name** and **Field Type** (which are grayed out) in the following image.



Update the fields that are unlocked and click **Save** to save the changes to the business object.

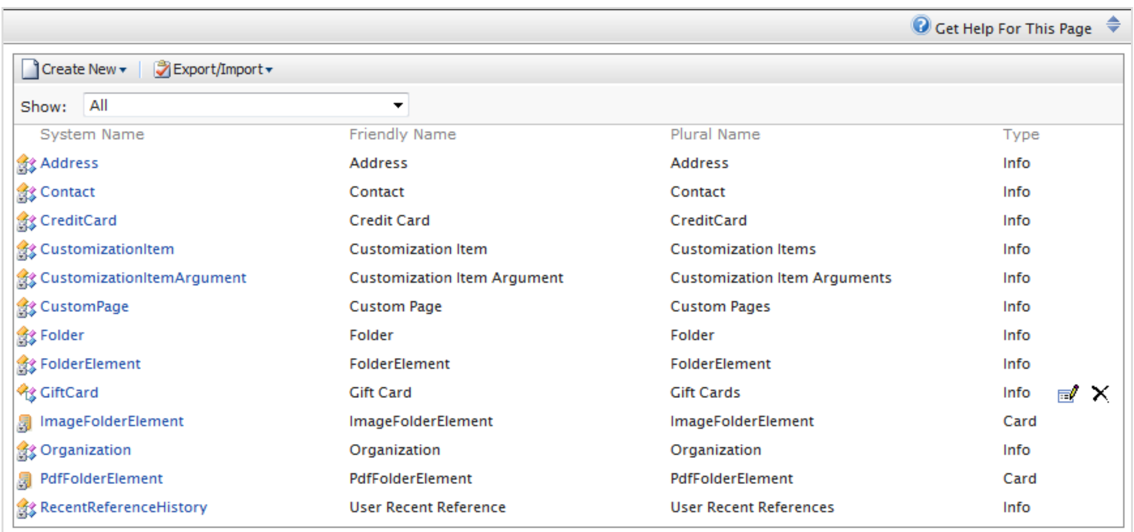
Adding fields to a business object

> **Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

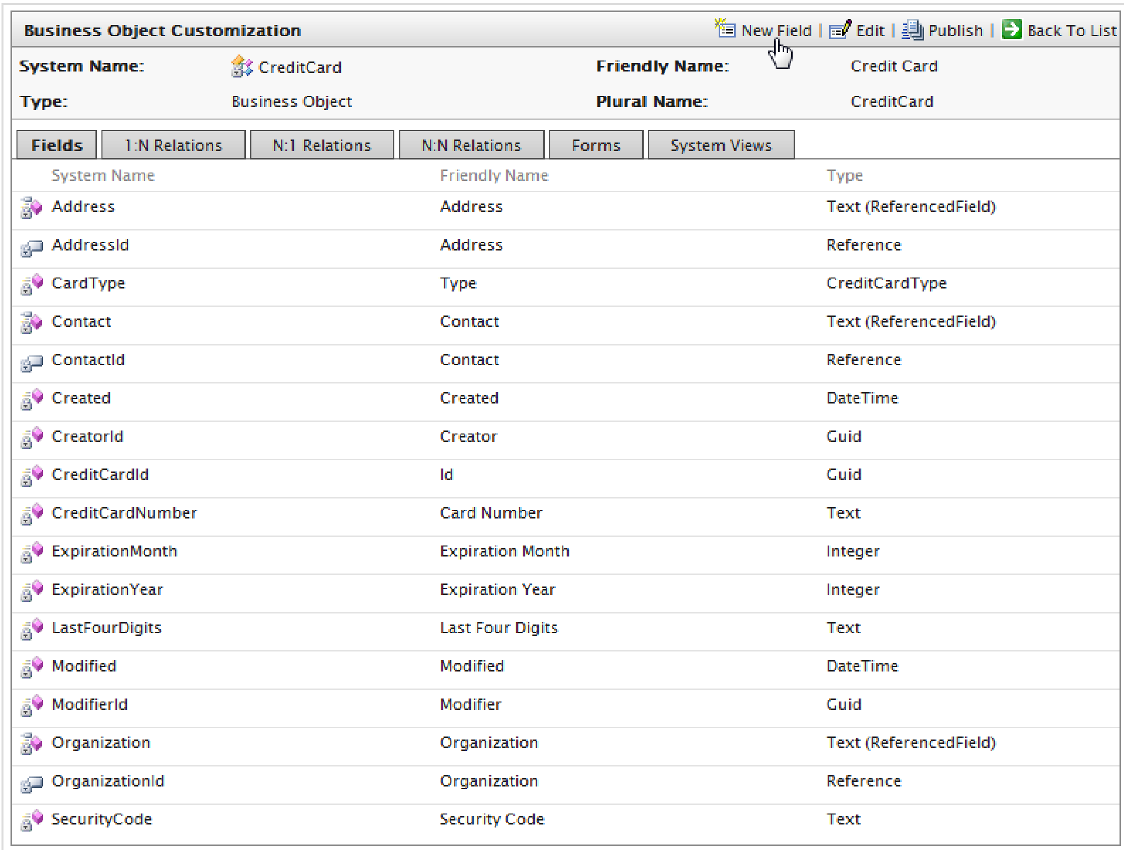
You can customize existing Business Foundation objects to have additional data entry fields. For example, you can add fields to the built-in Commerce Manager **New Credit Card** form.

Do the following to add fields to an existing business object:

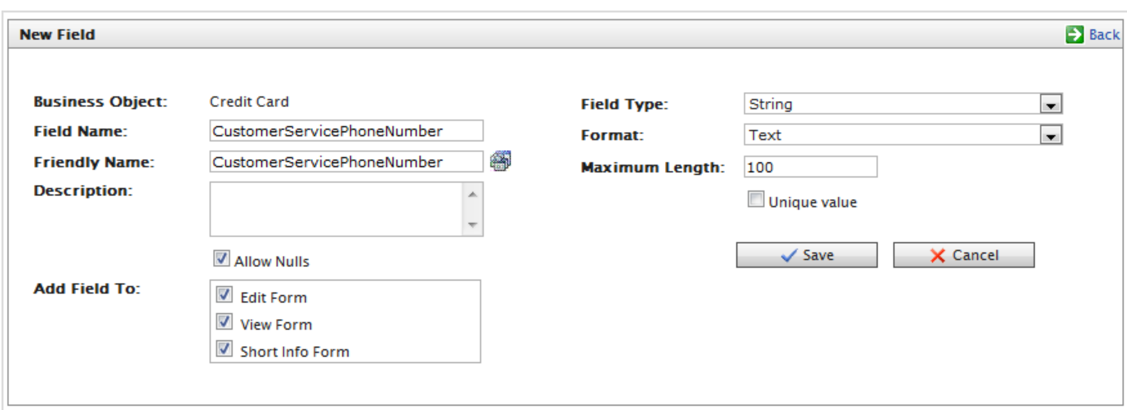
1. Click **Administration**, expand **System Settings**, and click **Business Foundation** to access the list of objects. This example uses the **CreditCard** business object.



2. Select the business object in the list to open it for editing, or click **New Field** to add a new field to the business object.



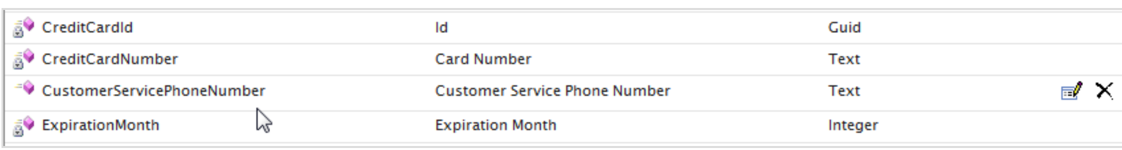
3. Fill out the **New Field** form to specify the type of data field you want created for the business object.



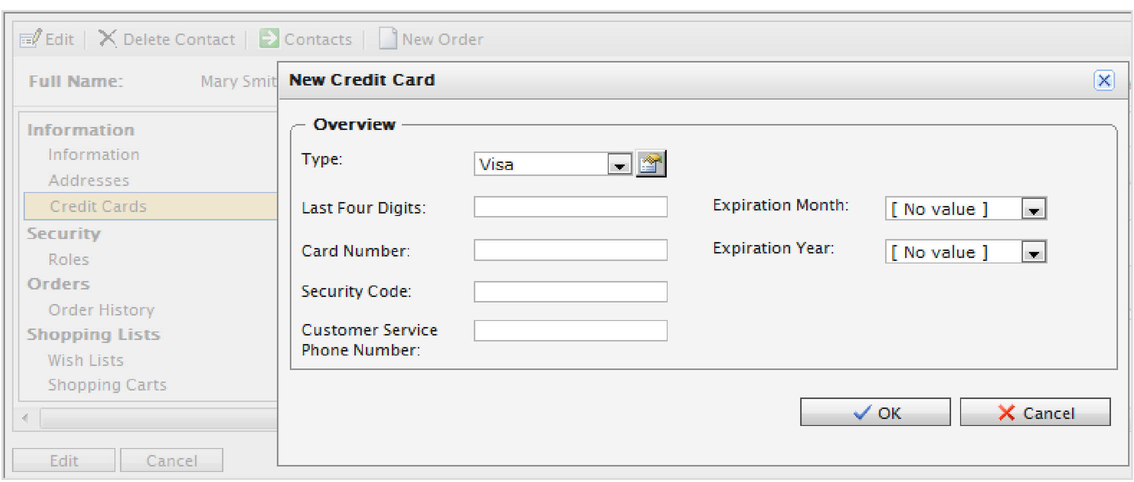
- **Business Object**. Automatically populated with the business object name.
- **Field Name**. Enter the system ID or name of the field. This name automatically populated the **Friendly Name** field.

- **Friendly Name**. Automatically populated using the Field name of the business object. You can change it, but must be unique from an existing field name (special characters and spaces are permitted).
- **Description**. Optionally enter text that appears below the data entry field.
- **Allow Nulls**. Select the box to make this an optional field that the user fills in while editing a form. Deselect the box to make it a required field.
- **Add Field to**. Select the Forms you want the field to render in, such as the **Edit Form** (to enter and submit information) or **View Form** (read information only).
- **Field Type**. Select a field type from the drop-down list, such as **integer**, **URL** or **date**.
- **Format**. Select a format. The drop-down list options depend on your **Field Type** selection.
- **Maximum Length**. The value depends on the Field Type selection.
- **Unique value**. Leave unselected.

4. Click **Save**. The new field appears on the list of fields.



5. To verify the new field, check the form associated with that new field.

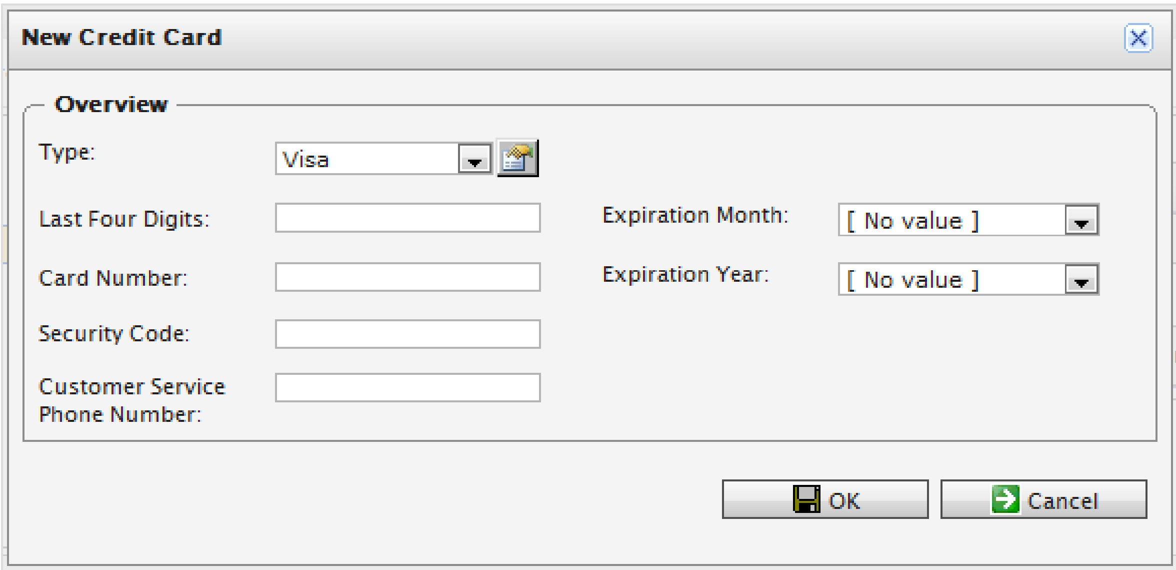


Customizing a form

Note: This topic is intended for administrators and developers with administration access rights in Episerver.

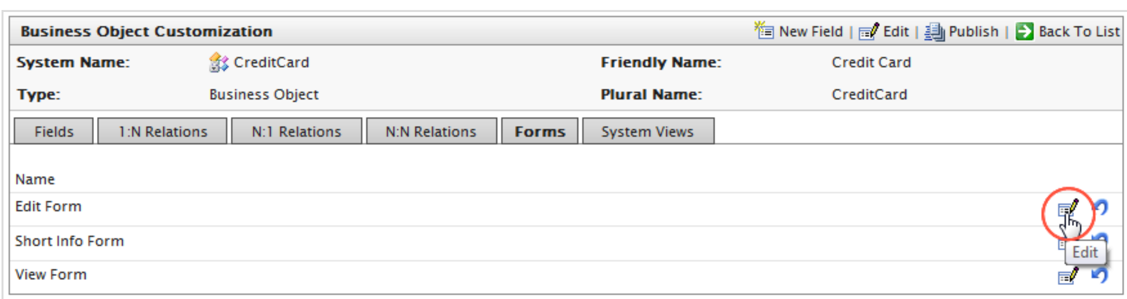
This section describes how to customize and adapt a form for your Episerver Commerce users.

Forms dictate how fields appear to the Episerver Commerce user when viewing and editing information in the system. Every field is associated with a form, and each business object is associated with one or more types of forms. Common types of forms are Edit Forms, Short Info Forms, and View Forms.

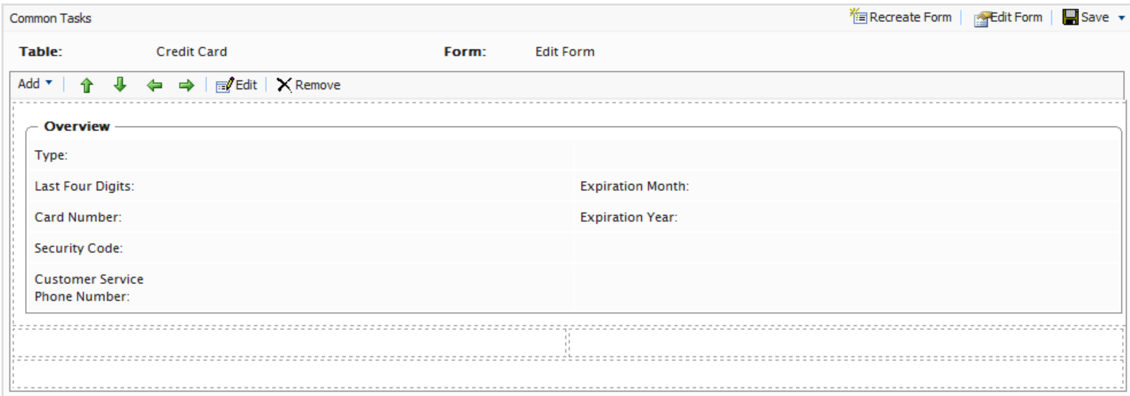


Editing a form

1. Select a **Business Object** and then click the **Forms** tab to see the list of associated forms.

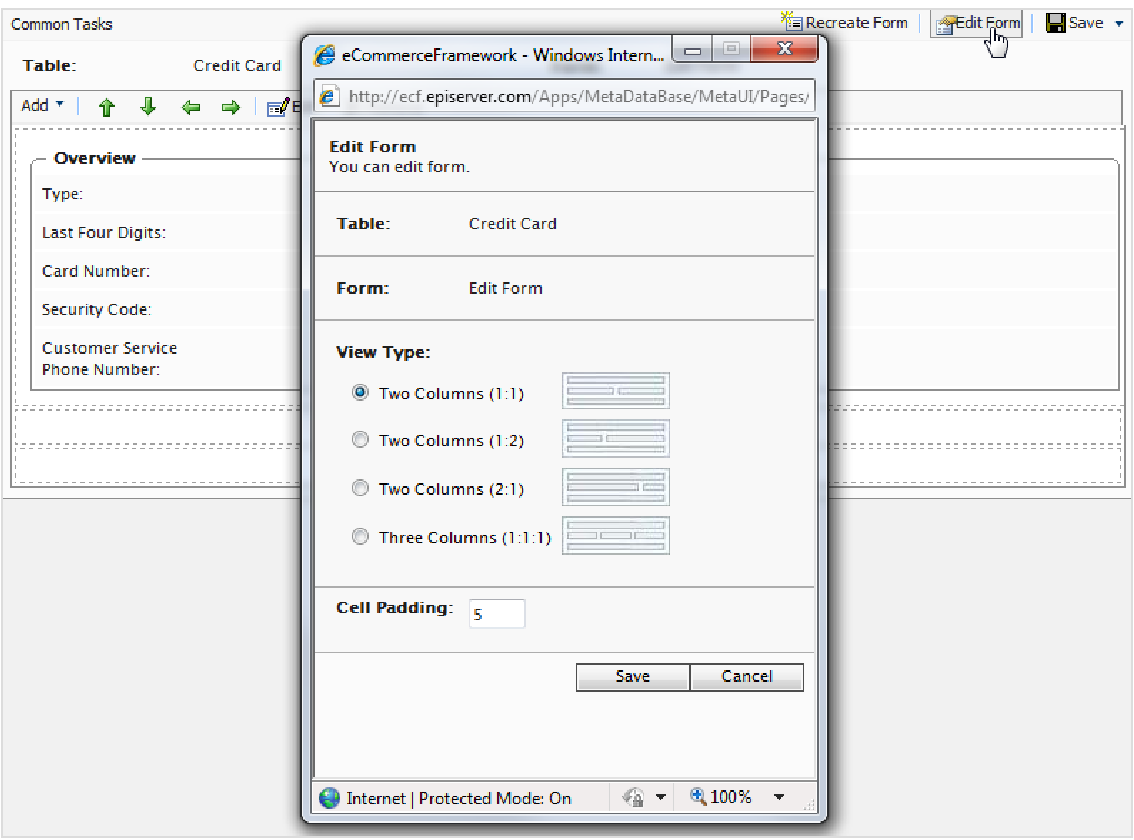


2. Click **Edit** next to the form you want. The form customization window appears.



Editing a form's layout

1. Click **Edit Form**.



a. Select a **View Type** (layout of the form).
   - Two Columns (1:1)
   - Two Columns (1:2)
   - Two Columns (2:1)
   - Three Column (1:1:1)

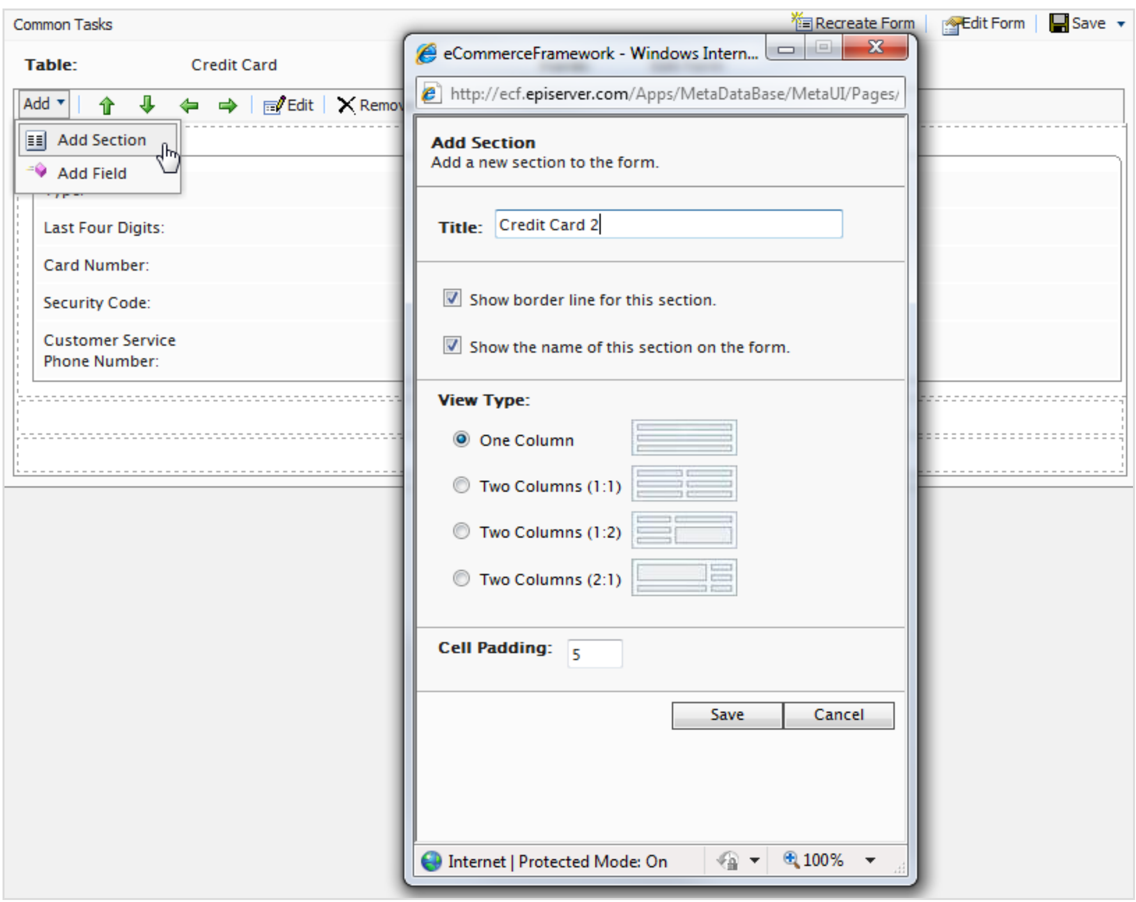
b. Enter in a pixel value for the **Cell Padding** (spaces between each cell).

2. Click **Save**.

Adding a section

A section separates groups of fields on a form with its own header and border. After you set the layout, you can add sections and fields.

1. Select **Add** > **Add Section** to add a new section.

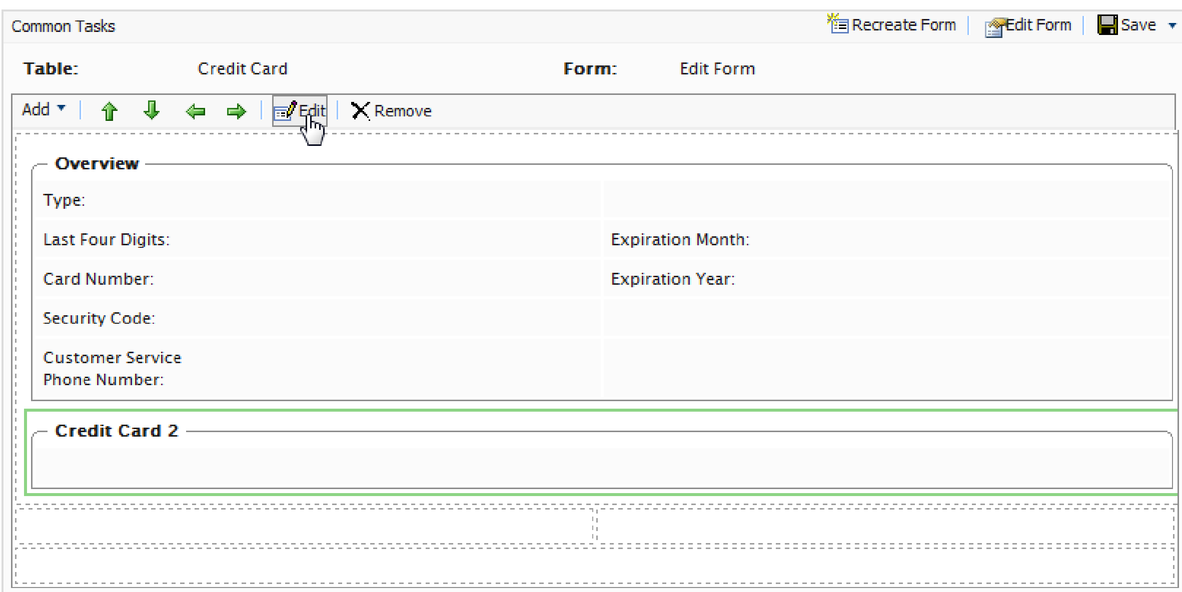


- **Title**. Enter the name of the section to display on the form (if enabled).
- **Show border line for this section**. Select the check box to show the border around section.
- **Show the name of this section on the form**. Select the check box to show the Title of the section on the form.
- **View Type**. Choose one.
    - One Column
    - Two Columns (1:1)
    - Two Columns (1:2)
    - Two Columns (2:1)
- **Cell Padding**. Enter the number of pixels for **Cell Padding** to determine the amount of space between each cell in the section.

2. Click **Save**.

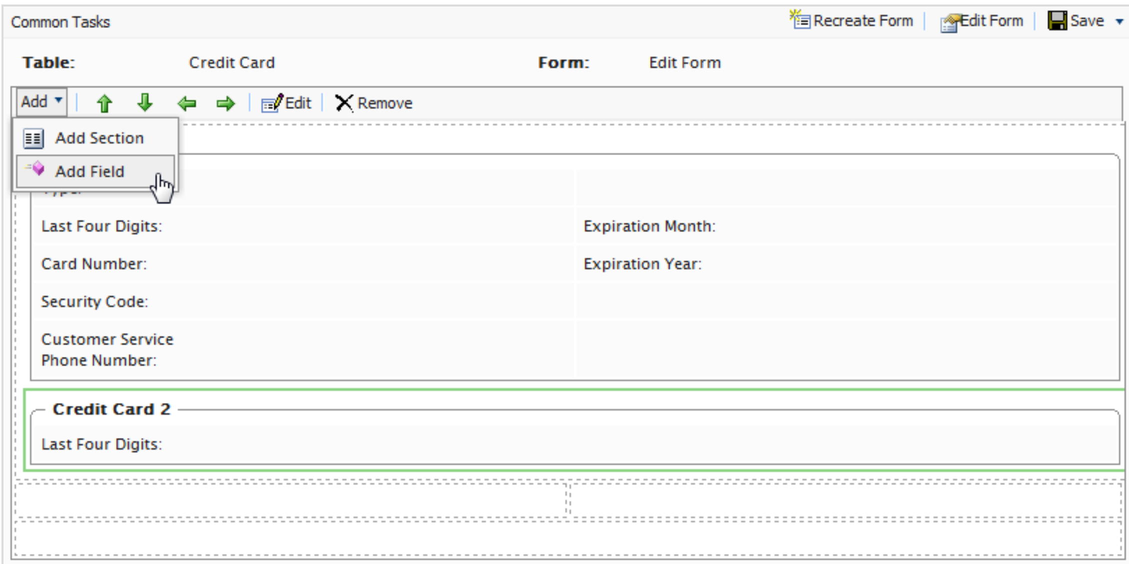
Editing a section

You can edit a section by selecting a section and click **Edit**.

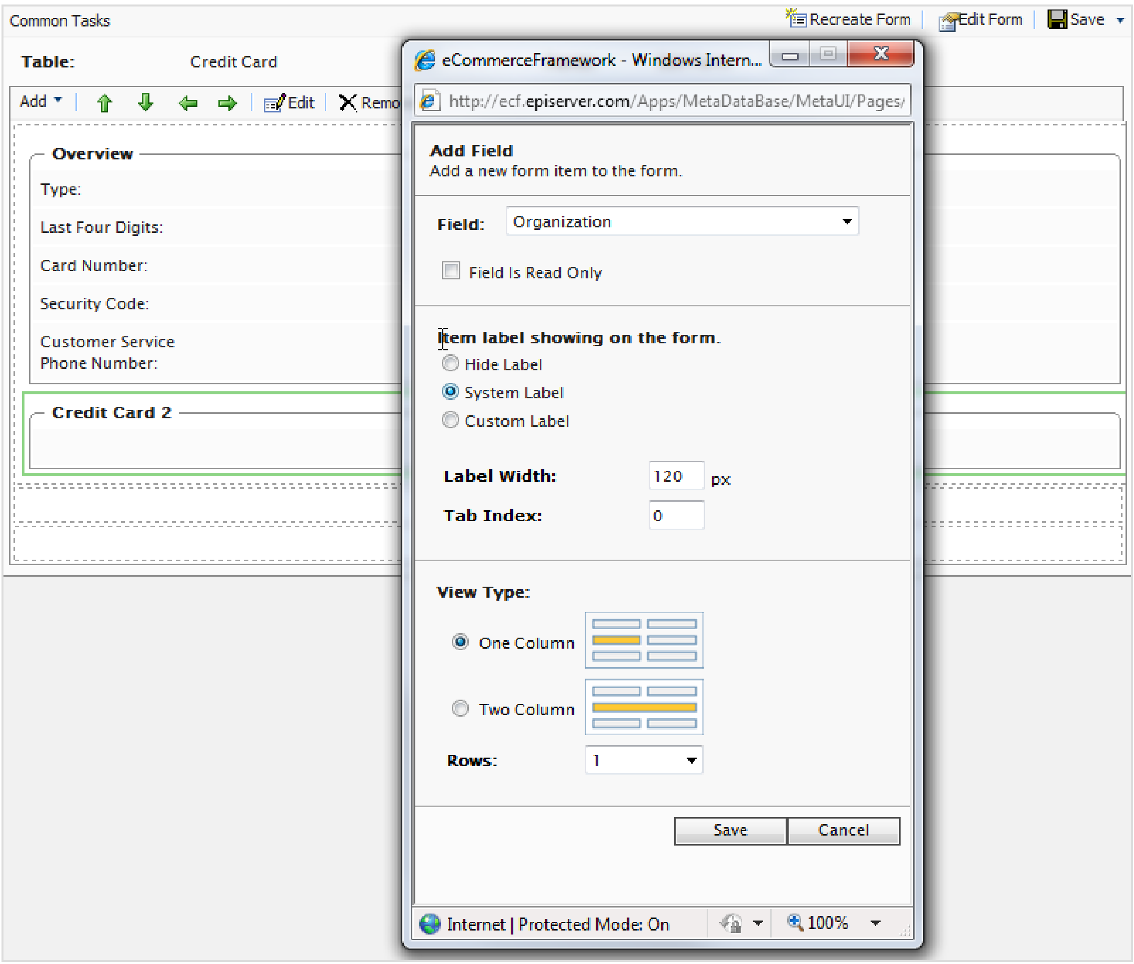


Adding a field to a section

1. Highlight a section and click **Add** > **Add Field**.



2. Select an existing associated field in the drop-down list.

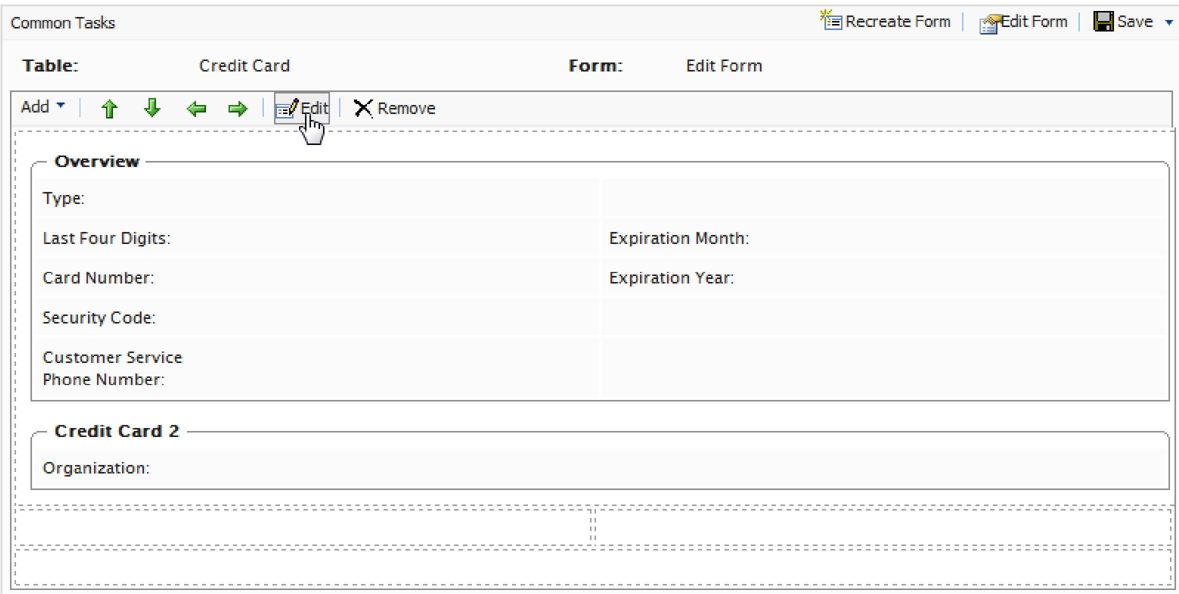


- **Field is Read Only**. Select the check box to make the field unavailable for editing. The field is grayed out on the rendered form.
- **Item label showing on the form**.
  - **Hide Label.** No label appears next to the text box.
  - **System Label.** Shows the system name next text box.
  - **Custom Label.** Enter a custom label.
- **Label Width**. Enter a number. (Default is 120px.)
- **Tab Index**. Enter an index for the tab.
- **View Type**. Select **One Column** or **Two Column**. In the **Rows** drop-down list, select the number of text box rows, up to 3.

3. Click **Save**.

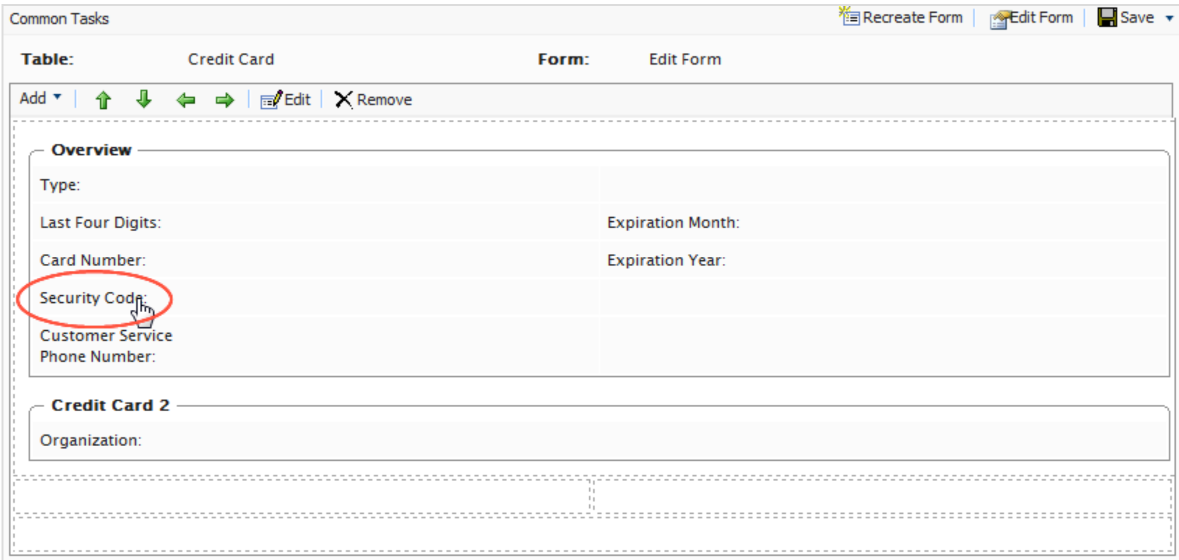
Editing a field

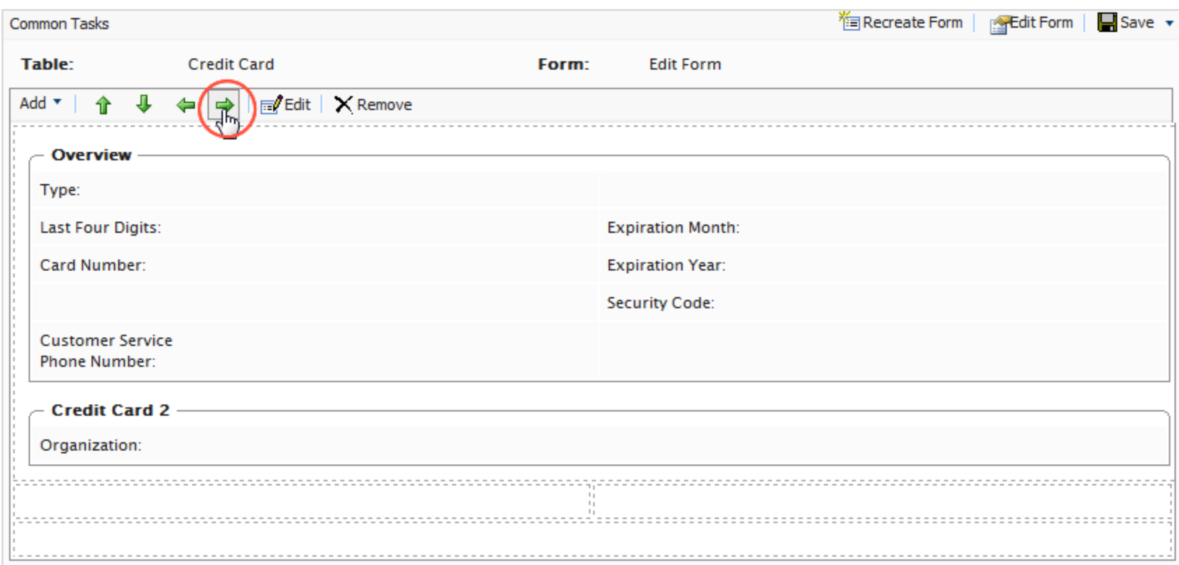
To edit a field, select and highlight the field and click **Edit** to change your previous set-tings.



Re-arranging fields

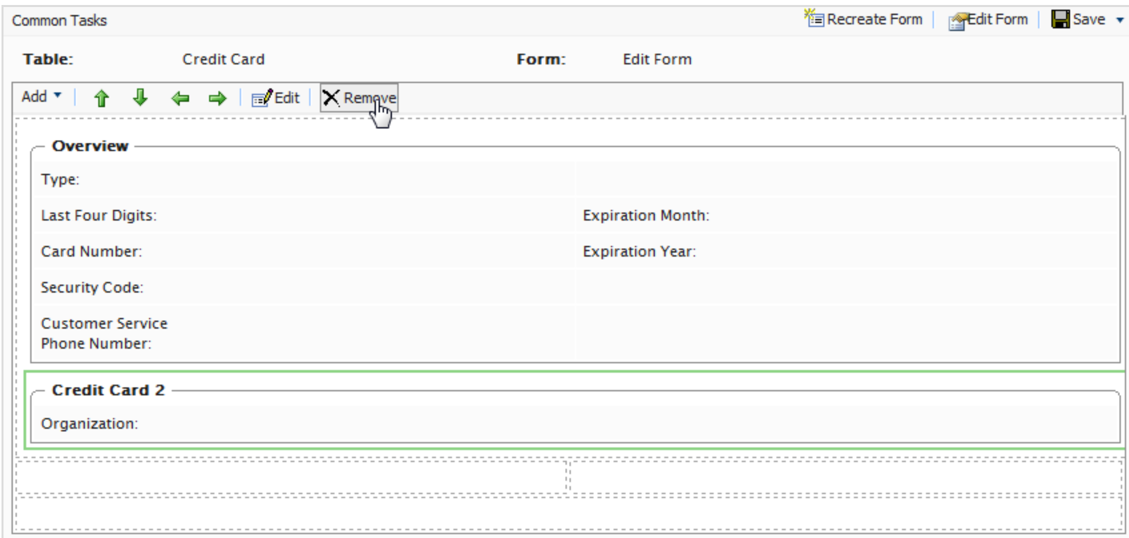
You can rearrange fields on a form using the arrow controls on menu bar. Highlight the field and then click the directional arrow you want the field to move to. In the following example, the **Security Code** field is moved to the right by clicking the right directional arrow. Fields are moved from cell to cell within a section.


Common Tasks
Recreate Form
Edit Form
Save
Table:
Credit Card
Form:
Edit Form
Add
Edit
Remove
Overview
Type:
Last Four Digits:
Expiration Month:
Card Number:
Expiration Year:
Security Code:
Customer Service Phone Number:
Credit Card 2
Organization:


Common Tasks
Recreate Form
Edit Form
Save
Table:
Credit Card
Form:
Edit Form
Add
Edit
Remove
Overview
Type:
Last Four Digits:
Expiration Month:
Card Number:
Expiration Year:
Security Code:
Customer Service Phone Number:
Credit Card 2
Organization:

Deleting a section or field

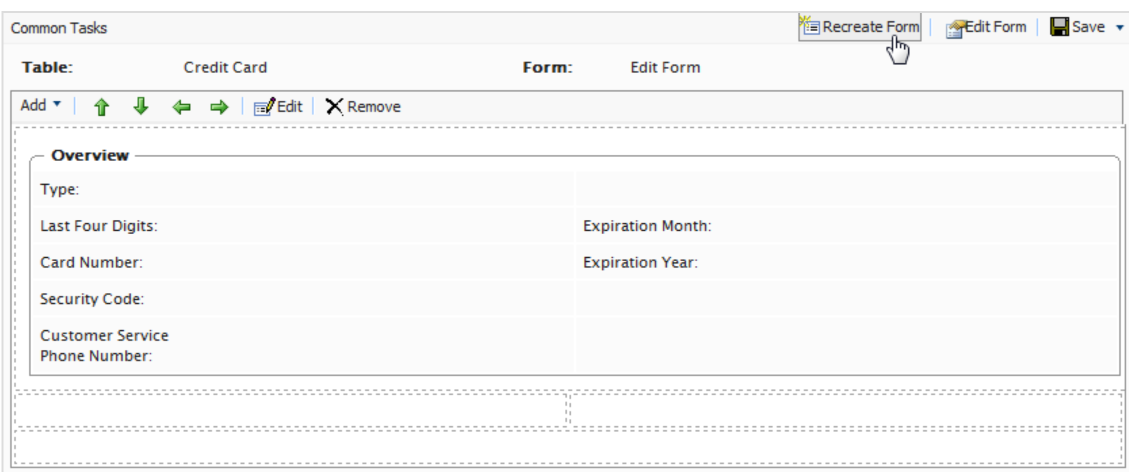
1. Highlight a section or field.
2. Click **Remove**. Click **OK** to confirm.



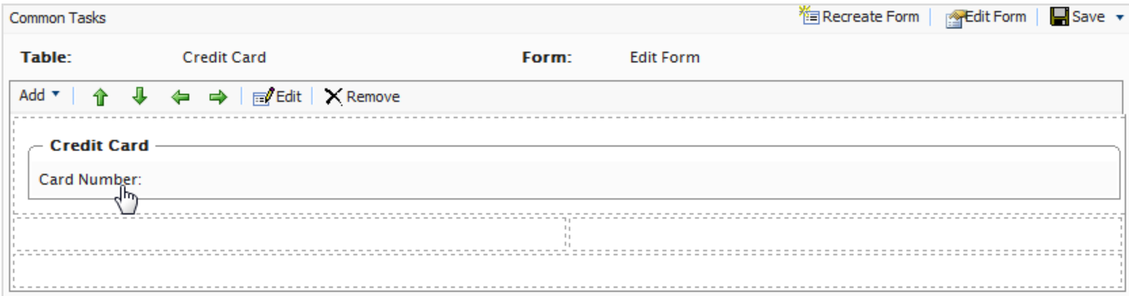
Recreating a form

You can recreating a form with a single field rather than customize a form with all fields already in place.

1. Click **Recreate Form** on the upper right corner of the window. A confirmation dialog box appears.



2. Click **OK** to recreate the form. After you confirm, the fields clear from the form except for the required field.



Relating business objects

Note: This topic is intended for administrators and developers with administration access rights in Episerver.

Business objects must be related to other business objects to connect, track and record relevant data.

You can have the following relationship types:

- **1-to-Many Relationship**. Associate (or relate) one object with multiple object-related data. For example, you can associate one organization with multiple contacts.
- **Many-to-1 Relationship**. Associate multiple object-related data with a single object. For example, you can relate multiple contacts to a single organization.
- **Many-to-Many Relationship**. Associate multiple object-related data with multiple objects. For example, you can associate different SKU (Stock Keeping Unit) with a number of warehouses for tracking and storage.

Adding a one-to-many relationship

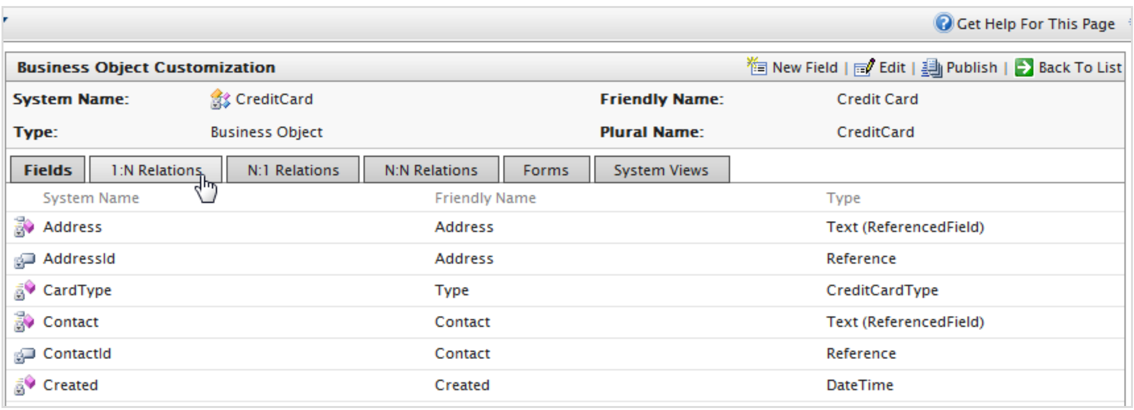
Note: This topic is intended for administrators and developers with administration access rights in Episerver.

You can relate business objects with a one-to-many (1:N) relationships. For example, if you have one organization, you can relate many types of data to that organization, such as multiple contacts, addresses, or organizational units or divisions within an organization. Within a 1:N relationship, the business object you selected will be 1.

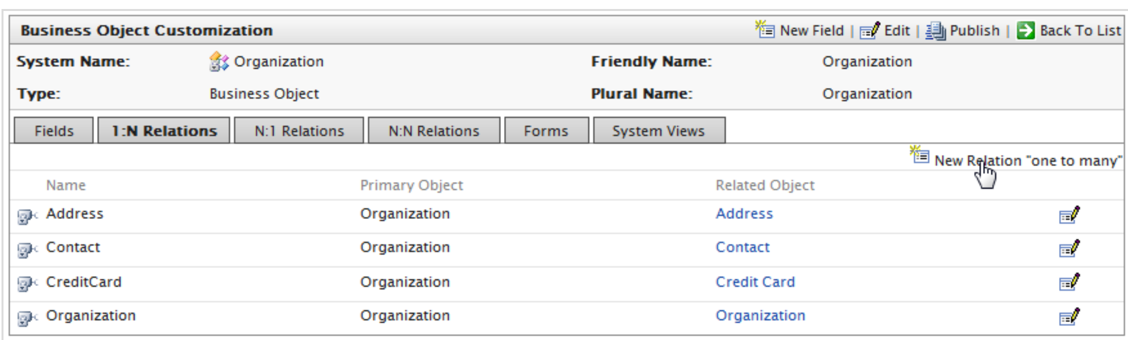
In the following example, 1 = Organization and N = Related Objects such as Address, Contact, CreditCard and so on.

To add a one-to-many relationship to a business object, you need to create a new business object or use an existing one.

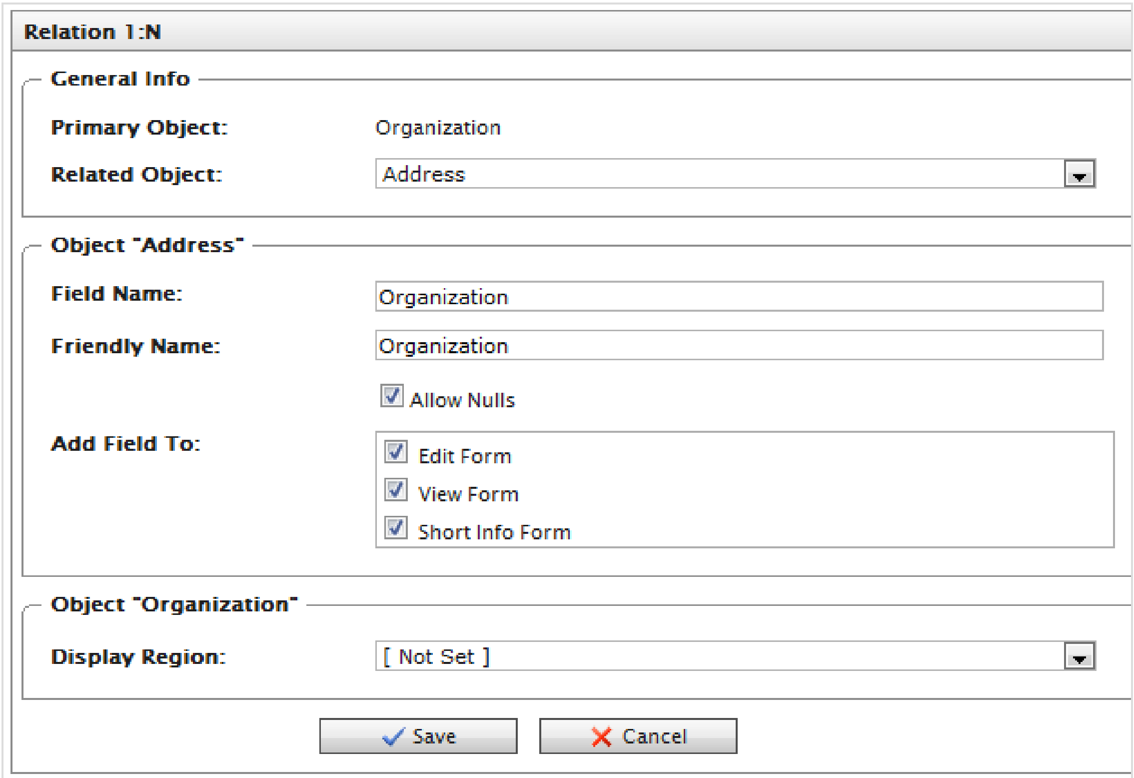
1. On the **Business Object Customization** page, click **1:N Relations.**



2. Click **New Relation "one to many"** to create a new relation.



3. Fill in the **Relation 1:N** dialog box.

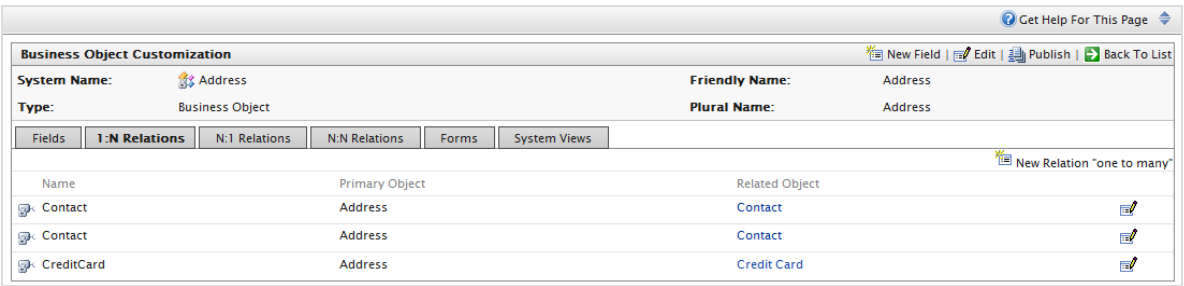


- **Primary Object.** Automatically set to Organization.
- **Related Object**. Select the drop-down item to relate the Organization object.
- **Field Name**. Automatically populated using the system name of the business object, but must be unique from an existing field name. Use only letters, numbers and underscores (_); no spaces or special characters.
- **Friendly Name**. Automatically populated using the system name of the business object. You can change it, but must be unique from an existing field name (special characters and spaces are permitted).
- **Allow Nulls**. Select the box to make this an optional field that the user fills in while editing a form. Deselect the box to make it a required field.
- **Add Field To**. Select the Forms you want the field to render in, such as the Edit Form (to enter and submit information) or View Form (read information only).
- **Display Region**. Select a region in the drop-down list. Additional options, such as **Display Text** and **Display Order**, appear based on your drop-down list selection.

4. Click **Save**.

Note: The Related Object has the Primary Object appear under the opposite relationship (N:1) on its configuration form. For example, if

Organization is the Primary Object and the Related Object is Address, the relationship is automatically generated under the **N:1 Relations** tab in **Address**.



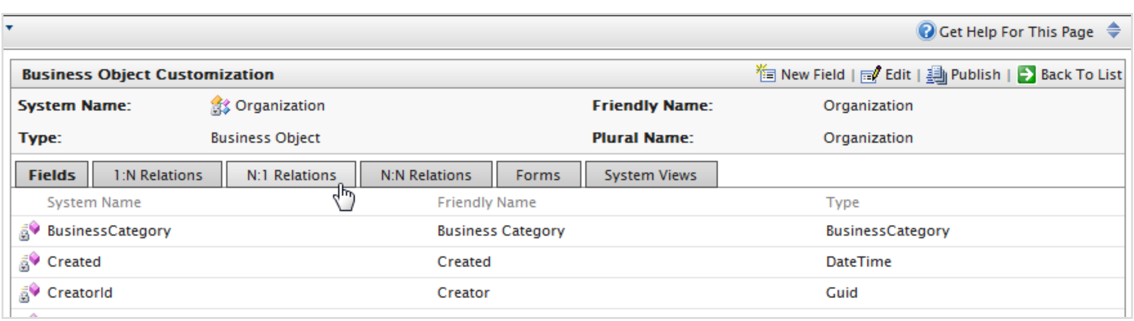
Adding a many-to-one relationship

Note: This topic is intended for administrators and developers with administration access rights in Episerver.

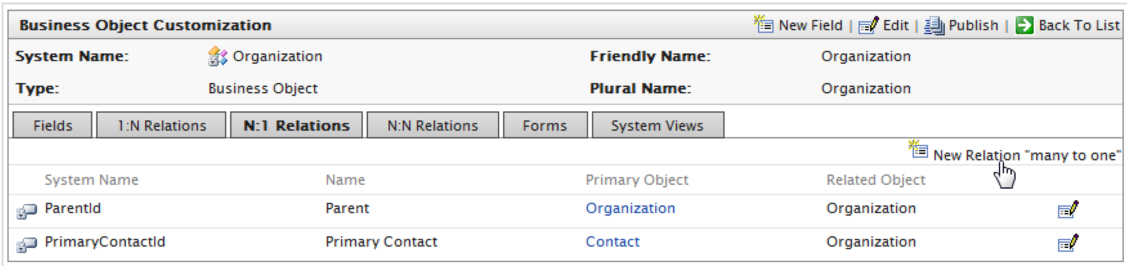
You can relate business objects with a many-to-one (N:1) relationship. For example, you can relate multiple contacts to a single organization or unit.

In the following example, N = Organization and 1 = Related Objects such as ParentId, PrimaryContactId and so on.

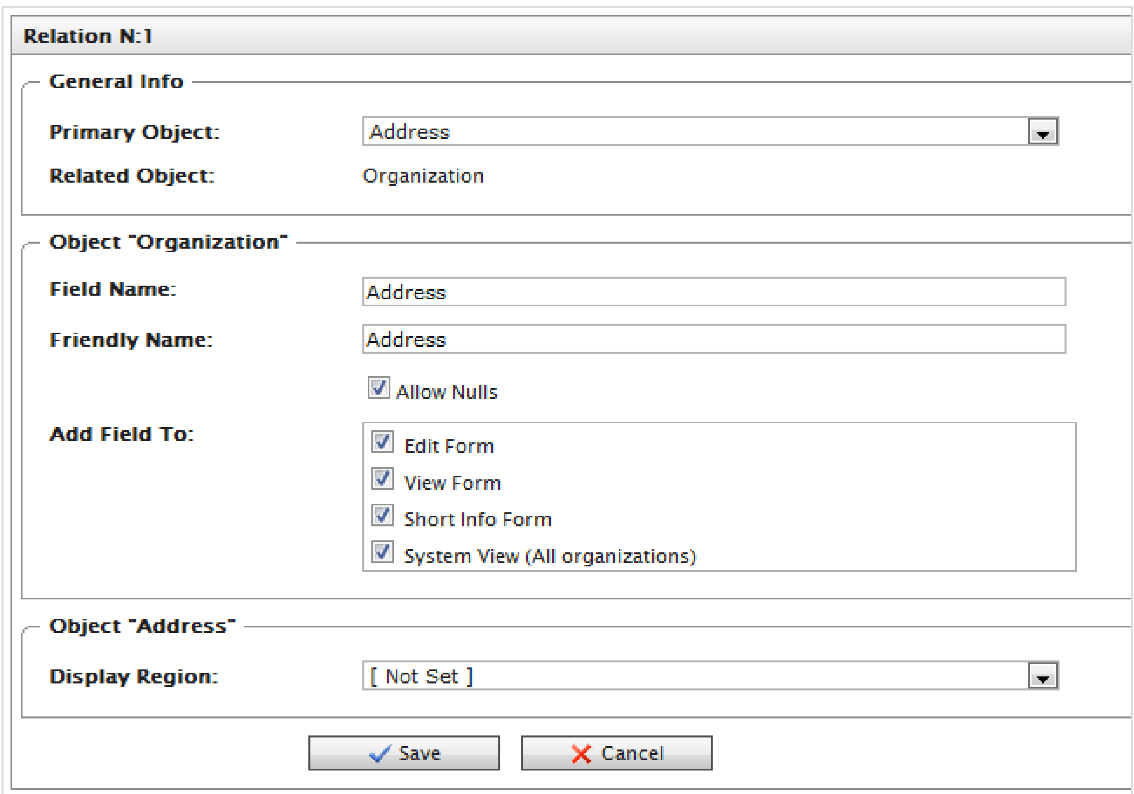
1. To create **many-to-one relationships**, select a business object and click the **N:1 Relations** tab.



2. Click **New Relation "Many to one"** to create a new relationship.



3. Fill in the **Relation N:1** dialog box. (The **Relation N:1** form is very similar to the **Relation 1:N** form, except you can select the Primary Object from the drop-down list, whereas the Related Object defaults to the name of the Business Object.)



- **Primary Object.** Select the drop-down item to relate an the Organization object.
- **Related Object**. Automatically set to Organization.
- **Field Name**. Automatically populated using the system name of the business object, but must be unique from an existing field name. Use only letters, numbers and underscores (_); no spaces or special characters.

- **Friendly Name**. Automatically populated using the system name of the business object. You can change it, but must be unique from an existing field name (special characters and spaces are permitted).
- **Allow Nulls**. Select the box to make this an optional field that the user fills in while editing a form. Deselect the box to make it a required field.
- **Add Field To**. Select the Forms you want the field to render in, such as the Edit Form (to enter and submit information) or View Form (read information only).
- **Display Region**. Select a region in the drop-down list. Additional options, such as **Display Text** and **Display Order**, appear based on your drop-down list selection.

4. Click **Save**.

> Note: Like an 1:N relationship, if you create a N:1 relationship with a Primary and Related Object, a 1:N relationship is automatically generated for the Primary Object on the **1:N Relations** tab.

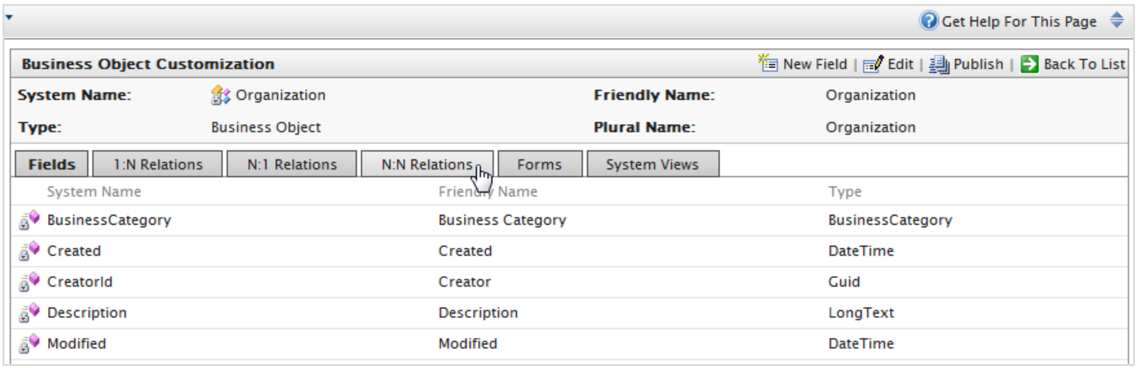
Adding a many-to-many relationship

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

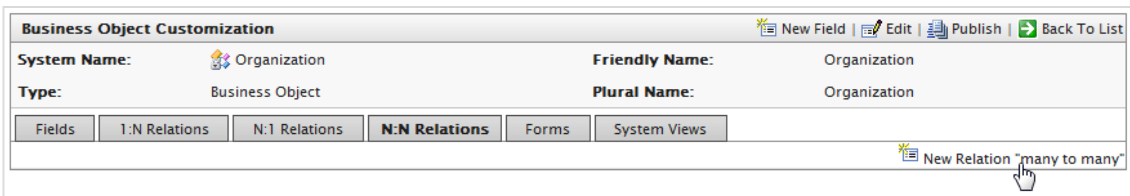
You can create a many-to-many (N:N) relationship with business objects. For example, a many-to-many relationship helps to track many SKUs and their inventory levels with many warehouse locations, or multiple contacts a part of multiple organizations. A many-to-many relationship between two objects is also called a bridge.

In the example both Organization and Organization_Contact = N.

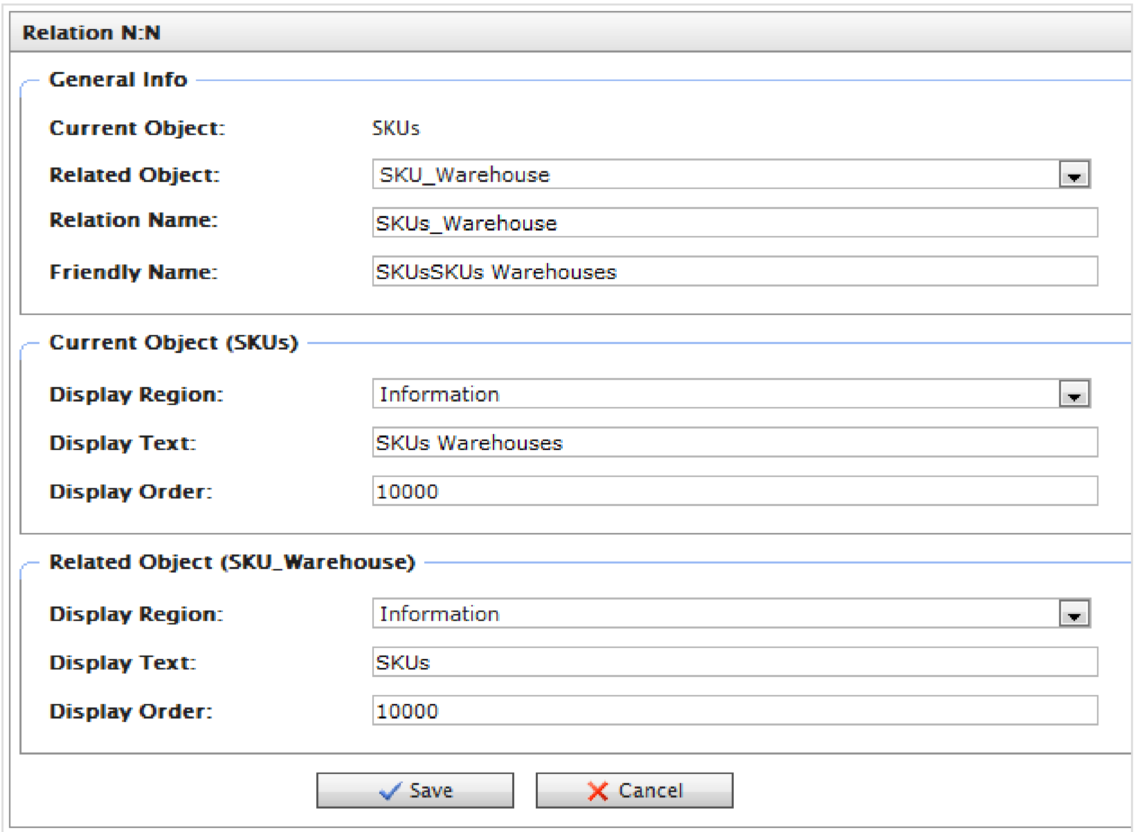
1. To create a many-to-many relationship, select a business object and then click the **N:N Relations** tab.



2. Click **New Relation "many to many"** to create a new N:N relationship.



3. Fill in the **Relation N:N** dialog box.



- **Current Object**. Defaults to the name of the Business Object you are editing.
- **Related Object**. Select an object from the drop-down list.
- **Relation Name**. Automatically populated by*Current Object Name_Related Object Name*. You can change it, but it must be unique and you can use only letters, numbers, and underscores (_); no spaces or special characters.
- **Friendly Name**. Enter a unique name (special characters and spaces are permitted).
- **Display Region**. Select a region where the field appears for the **Current Object (SKU)** and the **Related Object (SKU_Warehouse)** from the drop-down list.
- **Display Text**. Enter the text associated with the objects.
- **Display Order**. Enter the number associated with the objects.

4. Click **Save**.

> Note: A many-to-many relationship is automatically generated for the related object when you click its N:N tab on its configuration form.

Publishing business objects

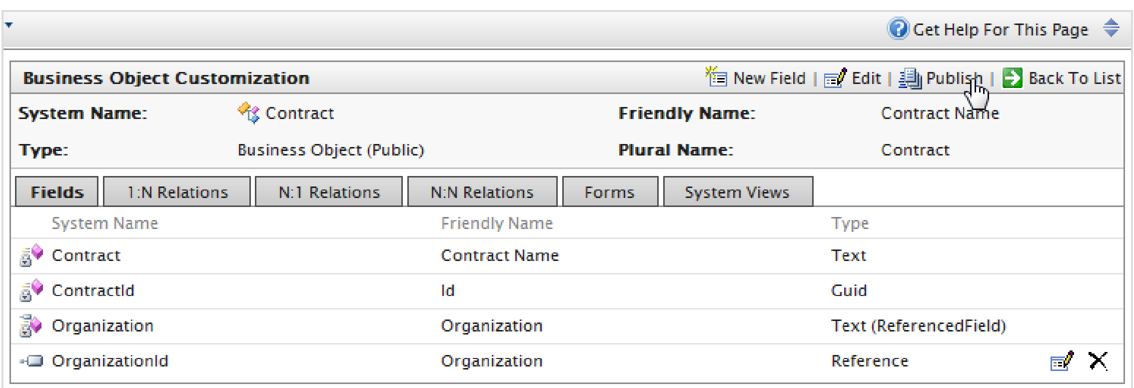
> **Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

When you publish a business object, you can do the following actions.

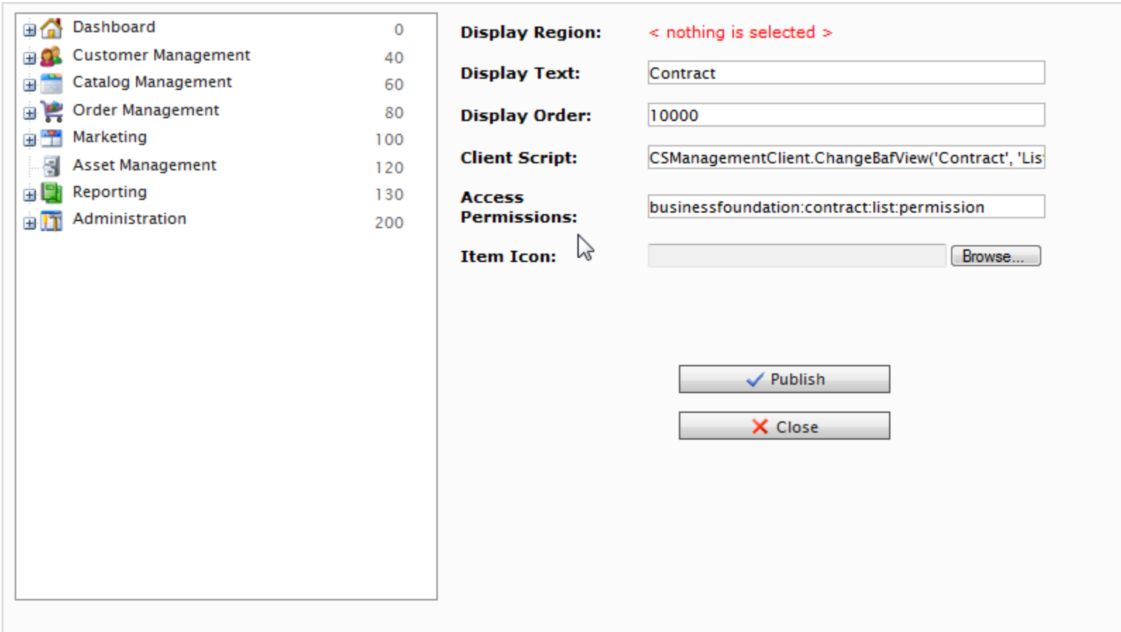
- Publish objects as a node in the left navigation in Commerce Manager.
- Add functionality to a specific system without modifying code.
- Set access permissions for the business object, controlling which user groups have access to use it.

See also: Customizing the left menu.

1. Click **Publish** on the **Business Object Customization** page.



2. You can set permissions by customizing **Access Permissions**. This string is auto-generated. To change it, you can copy and paste string values from other objects.



3. Click **Publish**.

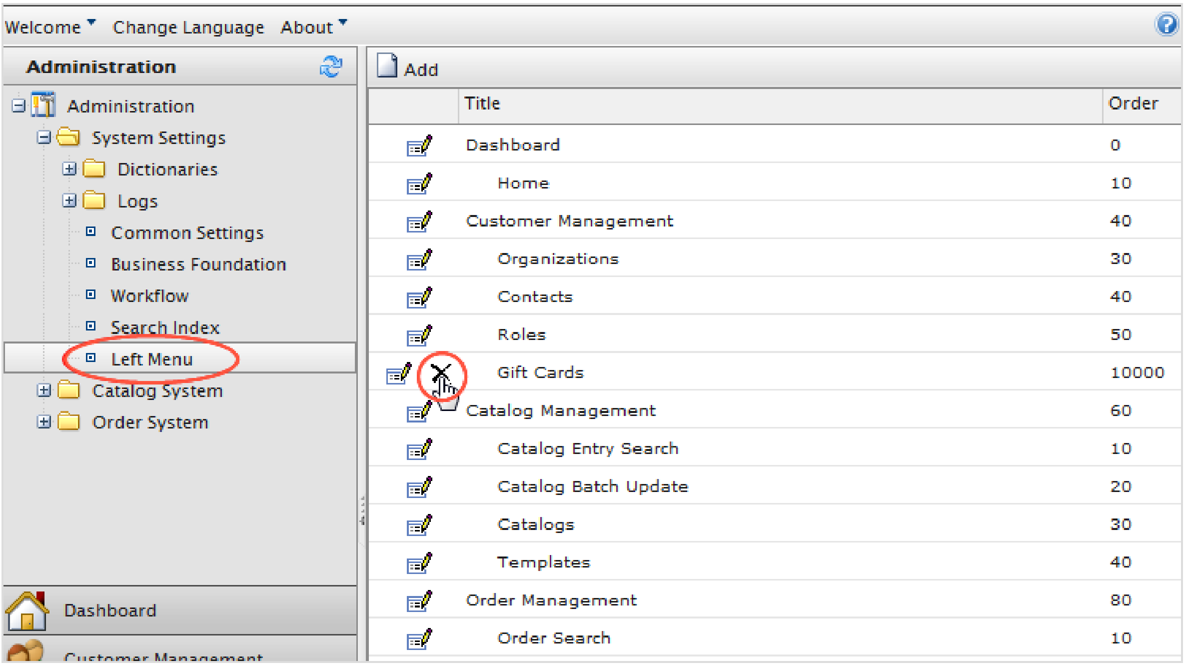
> Note: Refresh your browser after you publish a business object to make it appear in the left hand navigation.

Deleting business objects

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

Go to **Administration** > **System Settings** > **Business Foundation** to delete any customized business object that was published.

To remove an object from the left menu, go to **Administration** > **System Settings** > **Left Menu** and click **Delete**.



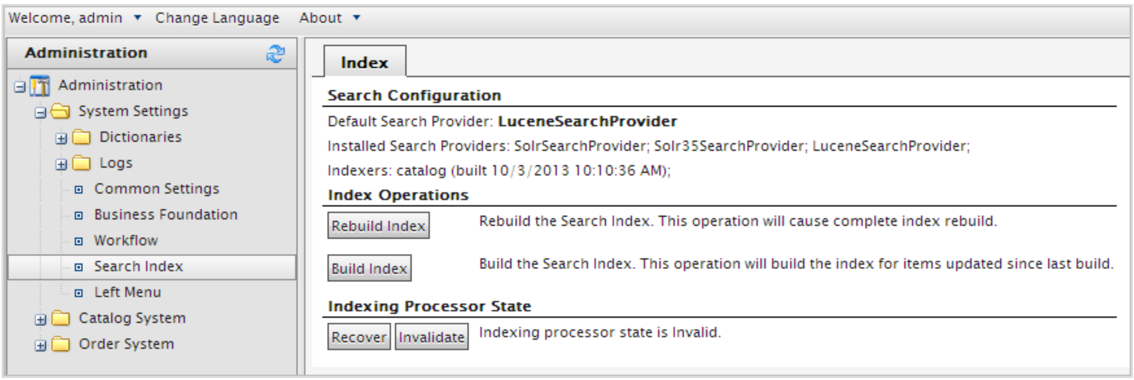
Updating a catalog search index

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

Indexing a catalog ensures that your search results are accurate and up-to-date. You can index a catalog in the following ways:

- **Build**. Indexes items that have changed since the previous build.
- **Rebuild**. Indexes everything in a catalog. Do this after creating a new catalog or making structural changes to a catalog (such as moving categories or renaming products).

1. Open Commerce Manager and go to **Administration** > **System Settings** > **Search Index**.



2. Click **Rebuild Index** or **Build index**. After performing the operation, you see the changes or additions reflected in your search results.

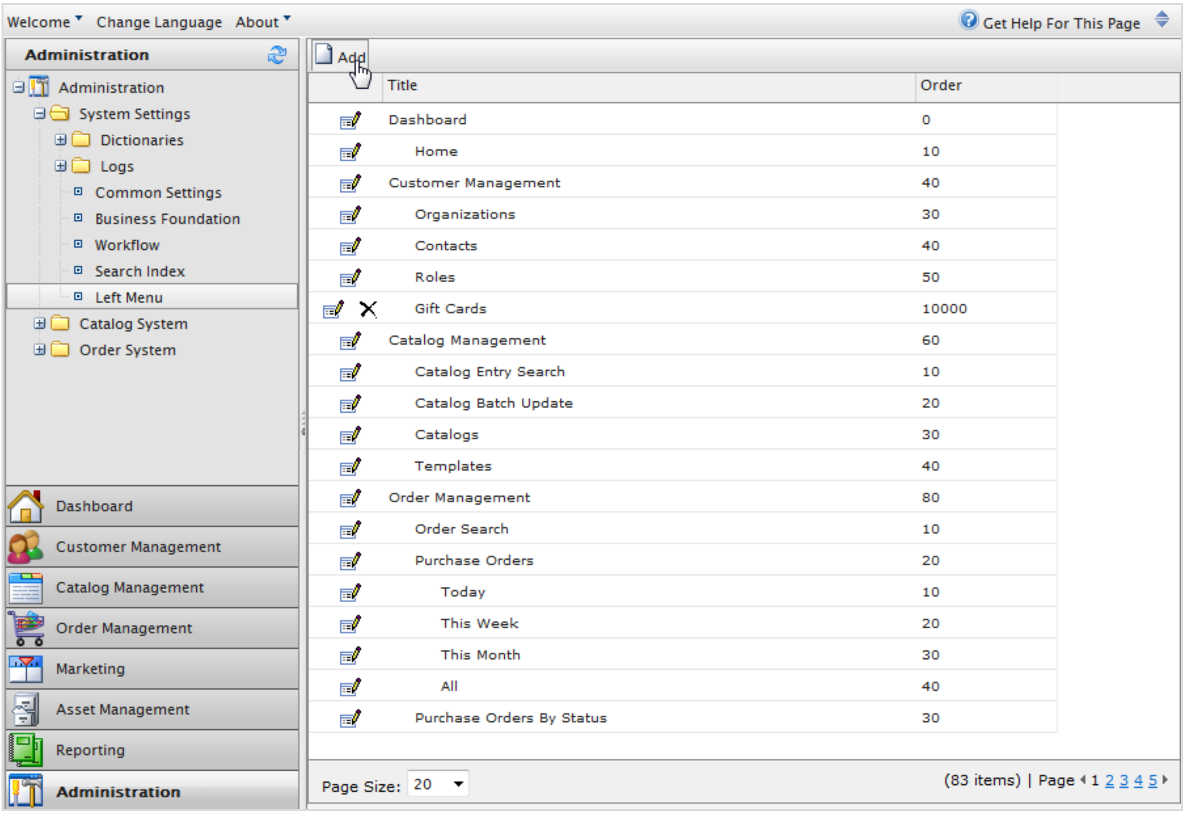
Customizing the left menu

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

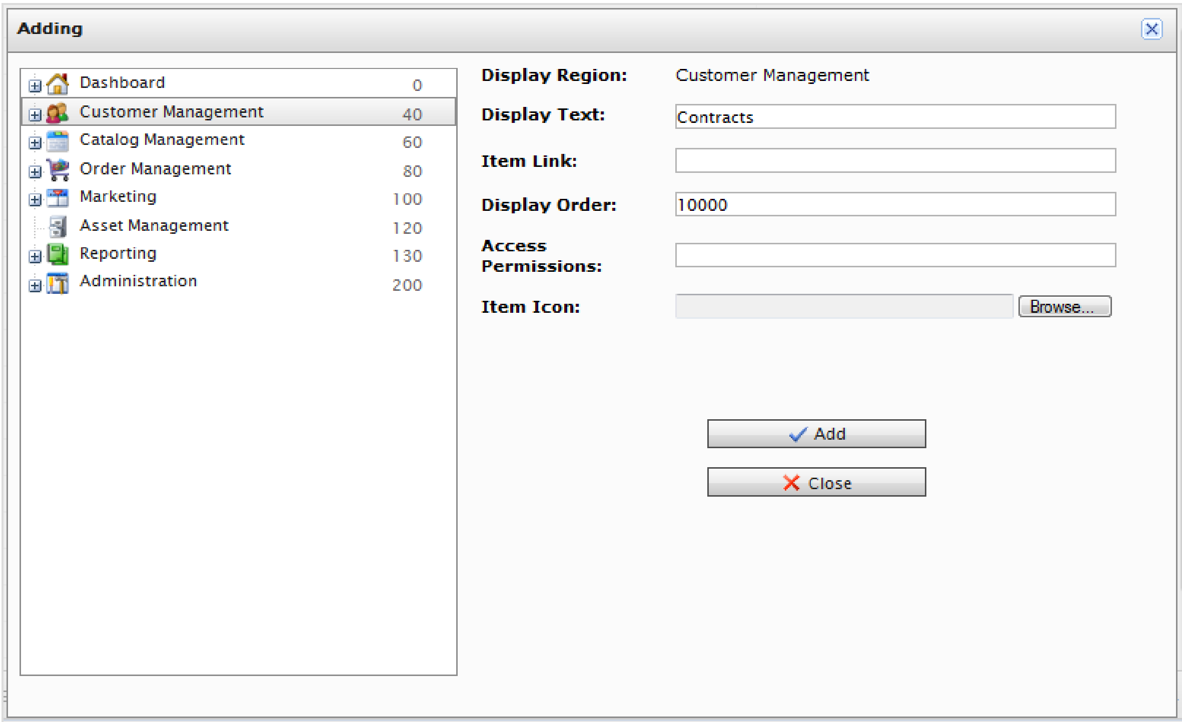
You can customize the left navigation frame in Commerce Manager by adding business objects. Before you customize, see Publishing business objects, which describes setting permissions and publishing of business objects.

Adding a left menu item

To add a **Left Menu** item, you can configure the entire menu item first within **Business Foundation**, or you can add an empty container by clicking **Add** and then going back to **Business Foundation** to fill in the page contents (objects).



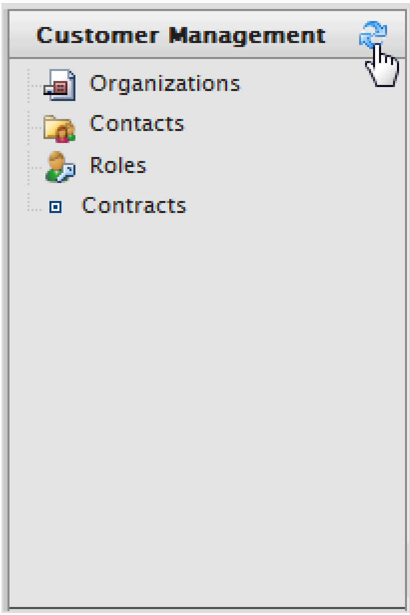
A dialog box appears for publication settings.



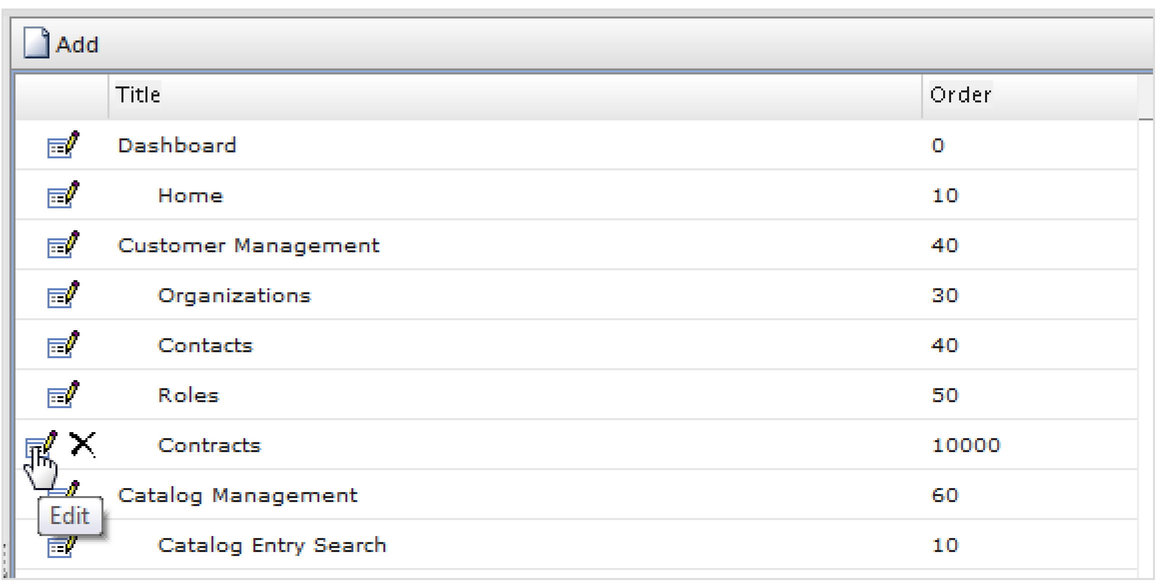
- **Display Region**. Select on an item in the navigation tree to display the parent node of the new left menu item.
- **Display Text**. Defaults to the system name of the Business Object. You can rename it.
- **Item Link**. Enter a URL to display when the new left menu item is selected.
- **Display Order**. Defaults to 10000. You can change the value to determine the position of the node.
- **Access Permissions**. Automatically populated (if the menu item was created in Business Foundation). See also: Access rights. If you are creating a new menu item, you can leave the field blank, or copy permissions from other menu items.
- **Item Icon**. Click **Browse** to upload an icon that represents the menu item.

Click **Add** to add the menu item under the Display Region item in the left menu.

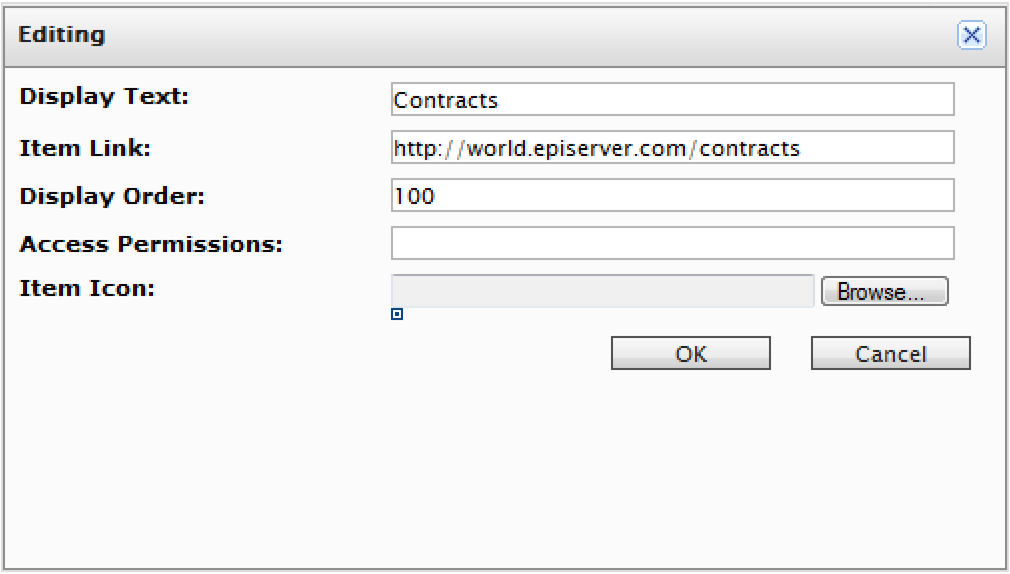
To verify if the object was published, go to the Display Region where you specified the object to be published. Click **Refresh** on the left navigation frame.



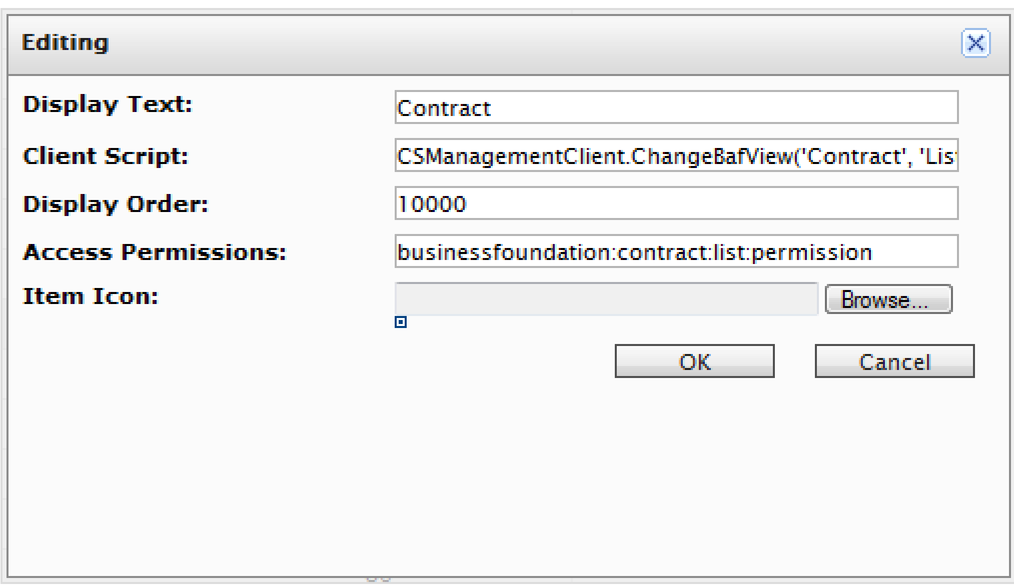
To edit a user-generated node in the left menu, click **Edit**.



If the left menu item was created via the **Left Menu** page, the following dialog box appears.



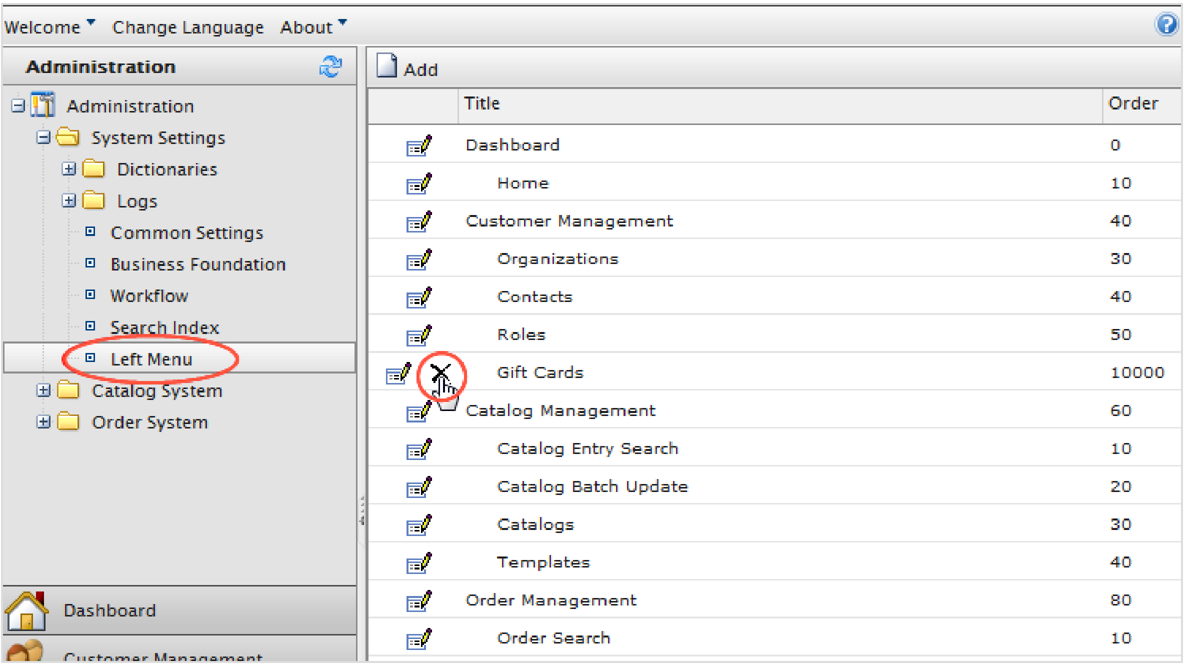
If the left menu item node was created using **Business Foundation**, the following dialog box appears.



To change the sort order of the left menu item, adjust the numerical value in **Display Order**. The lower the value, the higher the position of the item within the navigation tree relative to items with a higher Display Order value.

To save changes, click **OK**.

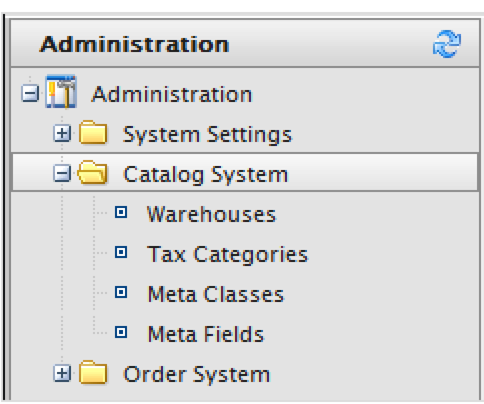
To delete a left menu item, click **X**.



Catalog system administration

Note: This topic is intended for administrators and developers with administration access rights in Episerver.

Go to **Administration** > **Catalog System** to set up warehouses, tax categories, and catalog specific meta-fields and meta-classes.

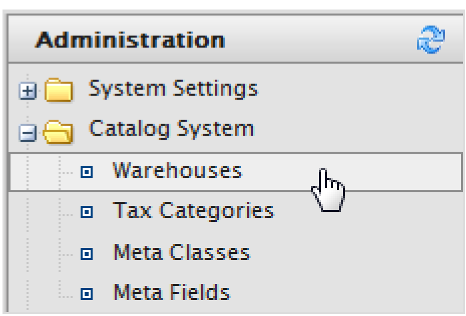


Warehouses

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

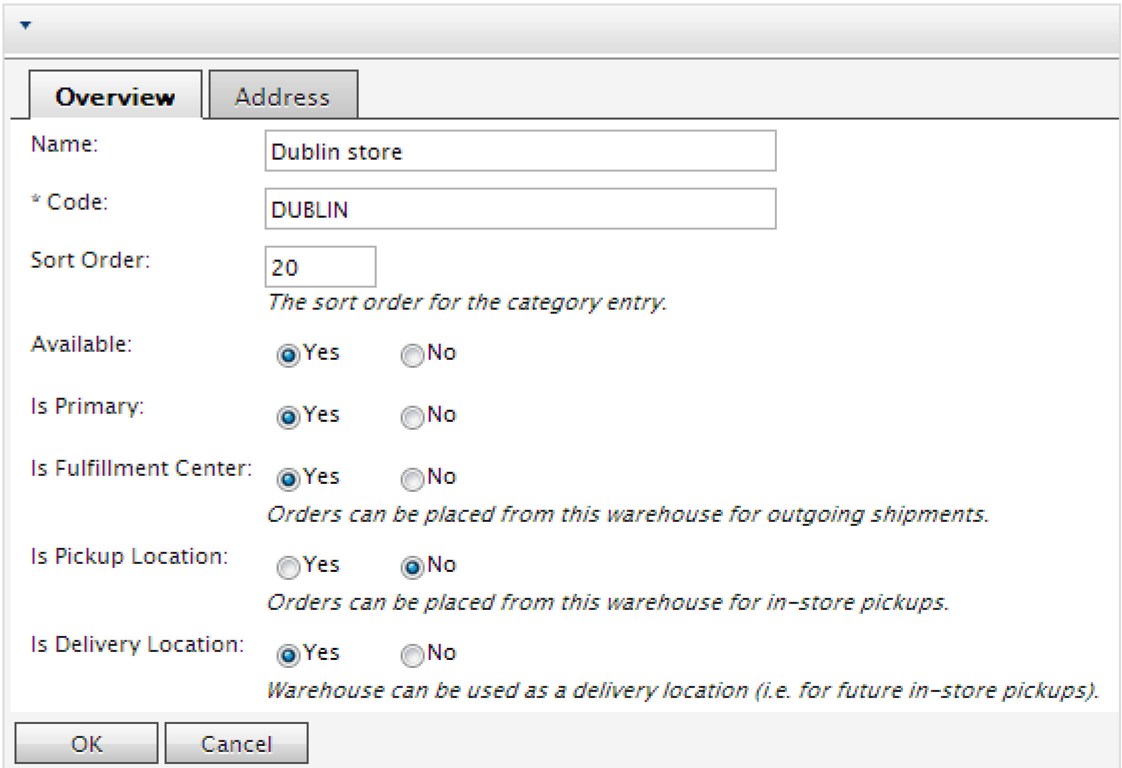
A warehouse is the physical inventory location with an address from where product items are shipped or picked up by customers. As an e-commerce manager in an organization with many fulfillment centers, you can define and manage physical store locations, multiple stock locations, stock figures for a product variant (SKU) by warehouse, and total product availability among warehouses. Depending on how you set up warehouses, you can check in-store stock, reserve and pick up in-store, and deliver to store. When you create a product variant, you specify the warehouse where the item is being stored.

1. Open Commerce Manager and go to **Administration** > **Catalog System** > **Warehouses**. The warehouse list appears.

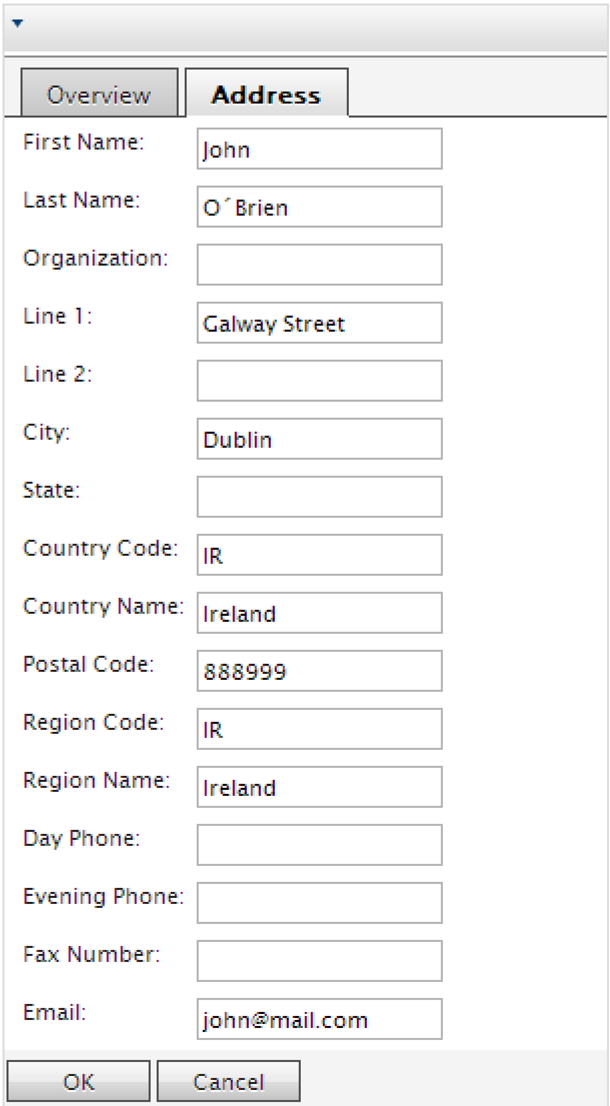
2. Click **New Warehouse**.

3. Enter information for the **Overview** tab.



- **Name**. Enter the name of the warehouse.
- **Code**. Enter the location code for the warehouse.
- **Available**. Select **Yes** to make the warehouse available; otherwise **No**.
- **Is Primary**. Select **Yes** to make this a primary warehouse; otherwise **No**.
- **Is Fulfillment Center**. Select **Yes** to make this a fulfillment center where you can place orders for outgoing shipments; otherwise **No**.
- **Is Pickup Location**. Select **Yes** to make this a pickup location where you can place orders for in-store pickups; otherwise **No**.
- **Is Delivery Location**. Select **Yes** to make this a delivery location that you can use for future in-store pickups; otherwise **No**.

4. Enter information for the **Address** tab.



5. Click **OK** to save your changes. The warehouse appears in the list.

Deleting a warehouse

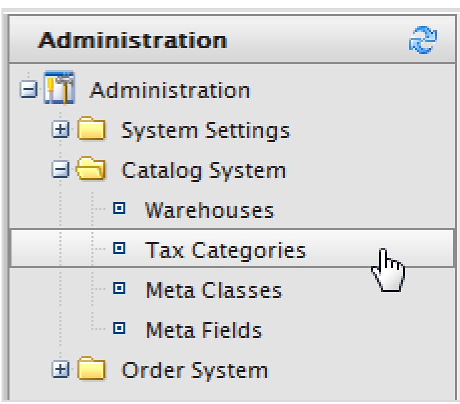
Select the warehouse and select **More Actions** > **Delete Selected**. Click **OK** to confirm.

Tax categories

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

A tax category for a catalog works in coordination with your tax configuration setup for orders, which includes specific taxes such as state, local, and federal taxes. You can add a *luxury items* tax category for specific product, or VAT (value-added tax) for different regions. See Tax configuration.

1. Open Commerce Manager and go to **Administration** > **Catalog System** > **Tax Categories**. A list of existing tax categories appears.



2. Click **New** to create a new category. A dialog box appears. In the **Tax Category Name** field, enter a name and click **OK** to save the tax category.

Deleting a tax category

To delete a tax category, click the **Delete** icon next to the item in the **Tax Categories List**. To delete multiple items, select the check boxes next to items, click **More Actions** > **Delete Selected**.

Catalog meta-classes and meta-fields

> **Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

You can extend the metadata of catalog items and order forms. For example, if you create a meta-class called *Wine*, add meta-fields that are characteristic for wine, such as *color*, *taste*, *vintage*, and *maturity*.

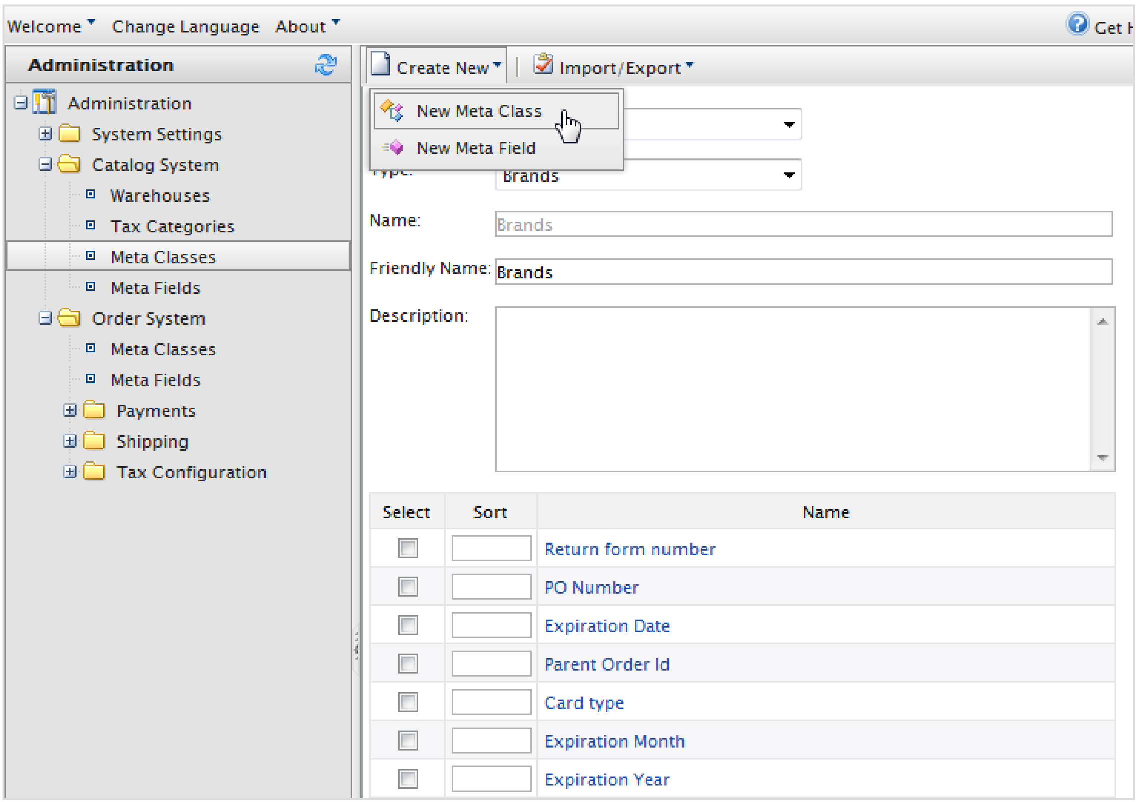
You can also define single and multiple dictionary types of value selectors with options. This results in a drop-down selector where editors can select values for product properties, such as *fabric types* for clothing, or *genre* for media.

After you create meta-classes and meta-fields in Commerce Manager, others can use them when working with catalog entries in the product catalog.

Creating a catalog meta-class

1. Open Commerce Manager and go to **Administration** > **Catalog System** > **Meta Classes**. The **Meta Classes** page appears.

2. Select **Create New** > **New Meta Class** and fill in the fields.



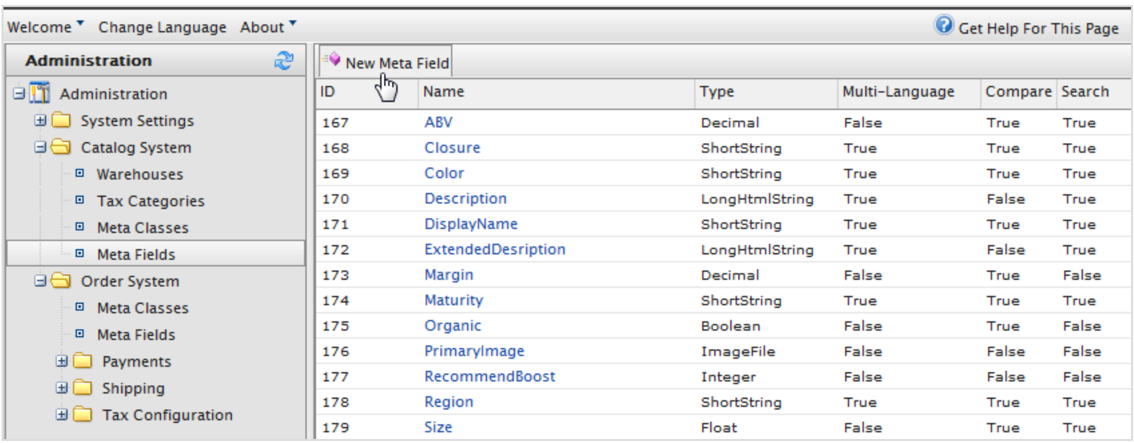
- **Name**. Enter the name of the meta-class used in your code. Spaces are not allowed.
- **Friendly Name**. Enter the name of the meta-class displayed for practical use in Catalog Management.
- **Description**. Enter a description of the meta-class.
- **Object Type**. Select the type of catalog entity to which this class applies: **Catalog Node** or **Catalog Entry**.

3. Click **OK**. The newly created meta-class appears in the **Type** drop-down list.

If you select the meta-class, you see available meta-fields listed but with none selected.

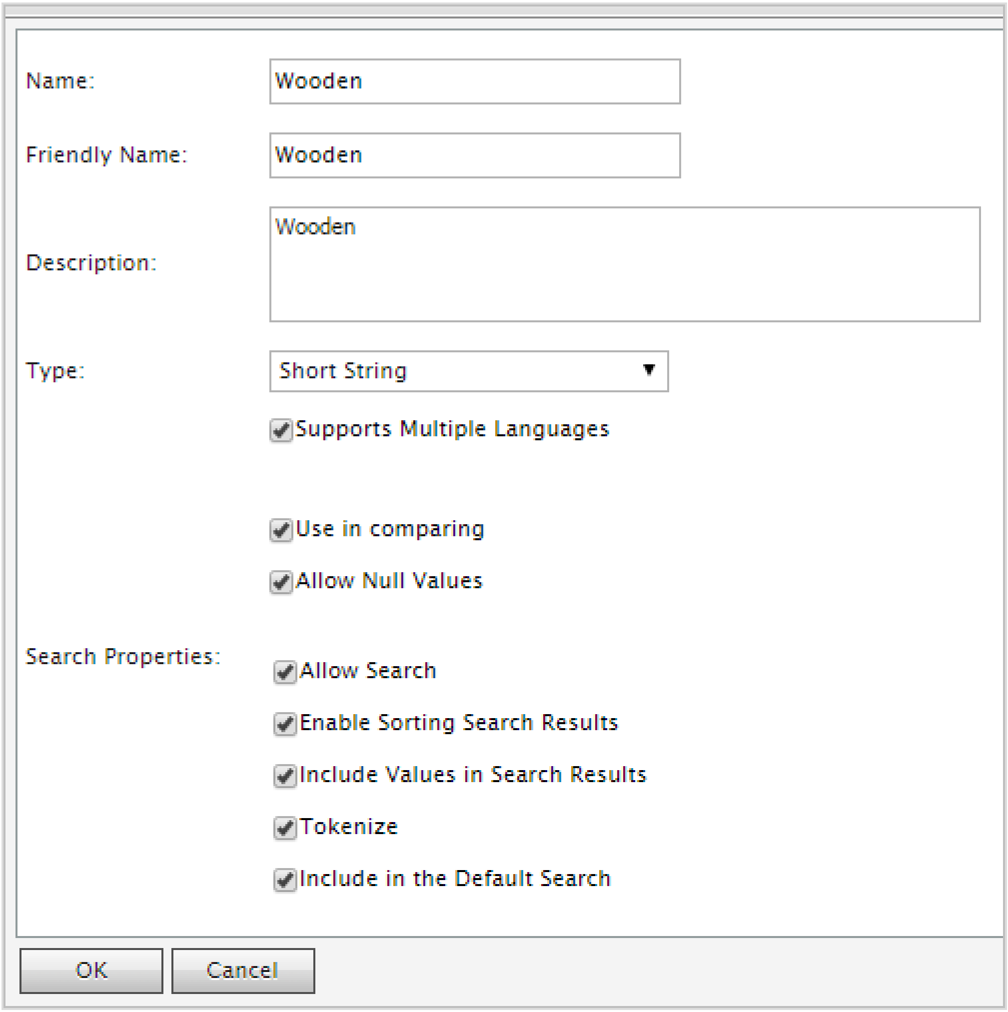
Creating a catalog meta-field

1. Go to **Administration** > **Catalog System** > **Meta Fields**. The **Meta Fields** page appears.
2. Click **New Meta Field**. The Meta Field edit page appears.



You can also select **Create New** > **New Meta Field** on the **Meta Classes** page.

3. Enter **Meta Fields** details.



- **Name**. Enter a system name without spaces or special characters (such as **NumberMegapixels**).
- **Friendly Name**. Enter a user-friendly name seen by users on the back and front-end (such as **Number of Megapixels**).
- **Description**. Enter information about the meta-field.
- **Type**. The drop-down list shows the following field types.
  - datetime
  - decimal
  - float

    - money
    - Integer
    - Boolean
    - Date
    - Email
    - URL
    - Short String
    - Long String
    - Long Html String
    - String Dictionary
    - File
    - Image File
    - Dictionary (single and multiple line dictionary type option selector)
    - **Supports Multiple Languages**. Select if the meta-field can appear in two or more languages.
    - **Use in comparing**. Select to compare items (only works if you have compare functionality on the front-end site).
    - **Allow Null Values**. Allows a null value for this field.

  - **Search Properties**. Depending on the data field type selected, you may have the option to set the search properties of the data field. The options are:

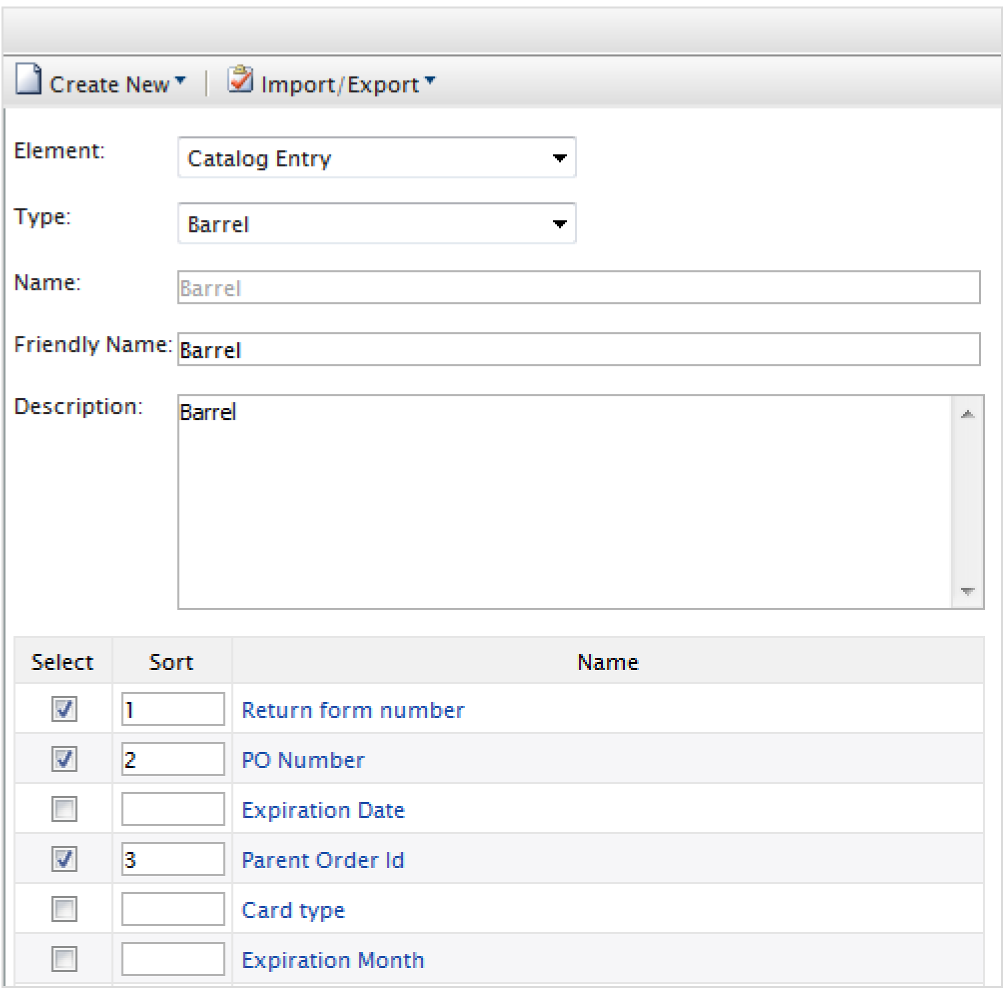
    - **Allow search**. Permit searching on this meta-field.
    - **Enable Sorting Search Results**. Enable sorting of search results on this meta-field.
    - **Include Values in Search Results**. Include the original value of this meta-field in the search results.
    - **Tokenize**. Prepare individual words (word breaking) in a long product description property.
    - **Include in the Default Search**. Tokenize and combine meta-field values for search from the front-end site.

4. Click **OK** to save your changes. The newly added meta-fields appear in the meta-fields list.

> Tip: If newly created meta-fields are not immediately visible, go to the next page or set the **Page Size** to display more entries.

Applying meta-fields to a meta-class

1. Go to **Administration** > **Catalog System** > **Meta Classes**. The Meta Classes page appears.
2. Select **Element** > **Catalog Entry**.
3. Select the desired meta-class from the **Type** drop-down list. The **Name**, **Friendly Name**, and **Description** fields are populated with default values.
4. Apply a meta-field to a meta-class by selecting the check box next to the meta-field. If you want to sort the order of the meta-fields in the catalog entry, enter a number into the **Sort** field.

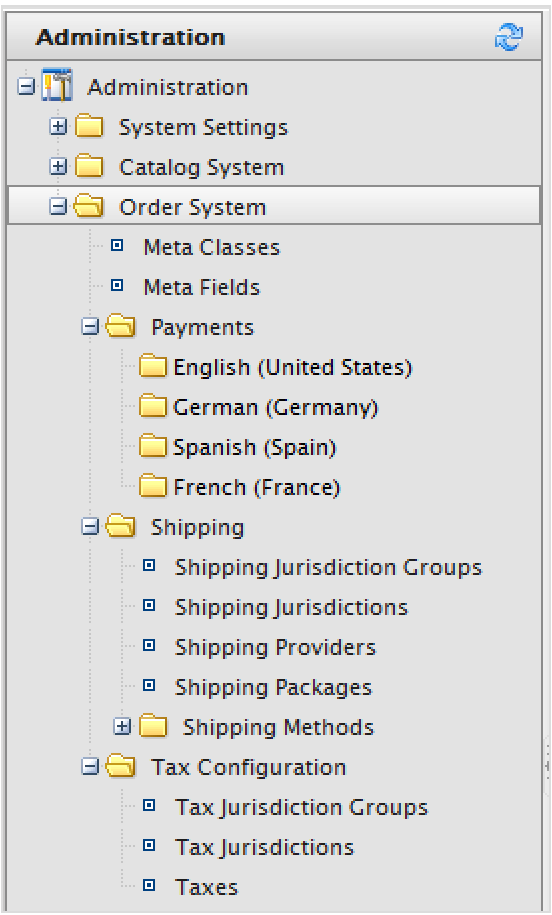


5. Click **OK**.

Order system administration

> **Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

Go to **Administration** > **Order System** to set up payment methods, shipping methods, providers, configure specific taxes, and order-specific meta-fields and meta-classes.



Payments

> **Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

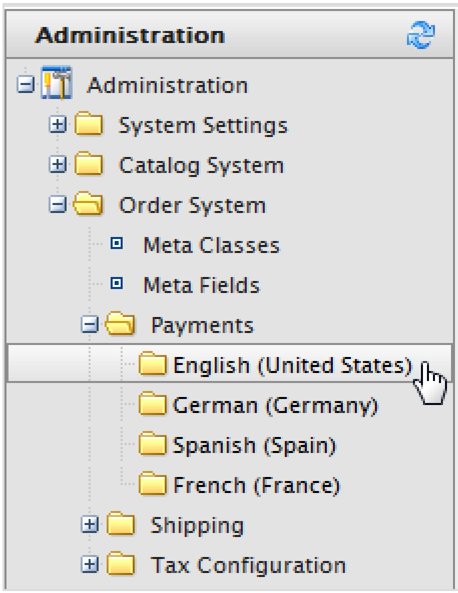
You need to create three components for payment in Episerver Commerce. You can also give customers several payment options and customize methods for specific markets.

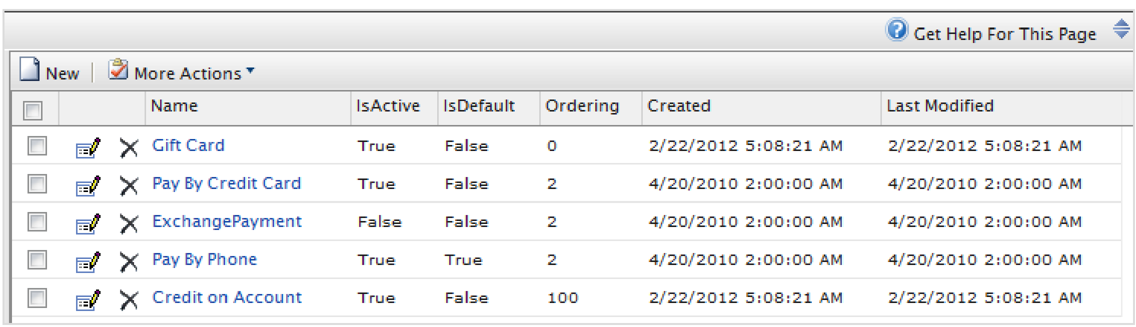
- **Payment type**. A meta-class that contains the properties for a particular payment type. For example, a credit card payment type contains credit card number, card expiration date, and card type. Episerver provides the following payment types:
  - Payment by phone
  - Exchange payment
  - Credit card payment
  - Other Payment

  Additional payment providers are available as modules for Episerver Commerce.
- **Payment gateway**. Provides an interface to the system that provides payment processing. A payment type is passed to the payment gateway and the gateway executes the payment transaction with the payment system (such as PayPal). One payment type is associated with each payment gateway.
- **Payment method**. Contains information about the way the customer views a payment option and has a payment gateway associated with it.

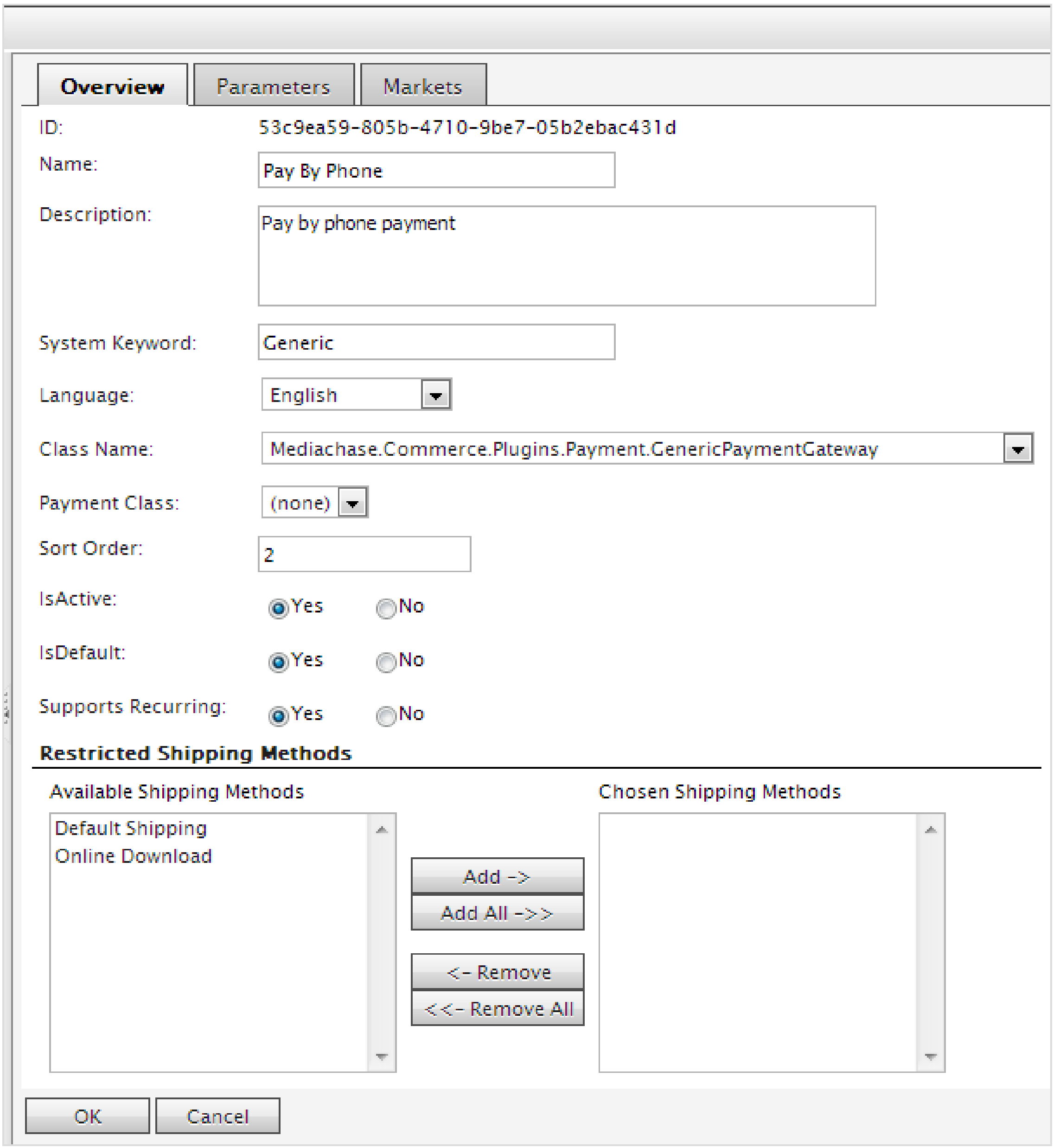
Setting up a payment

1. Open Commerce Manager and go to **Administration** > **Order System** > **Payments** and select a language in the list. The **Payment Methods** window appears, displaying available payment methods for the selected language.



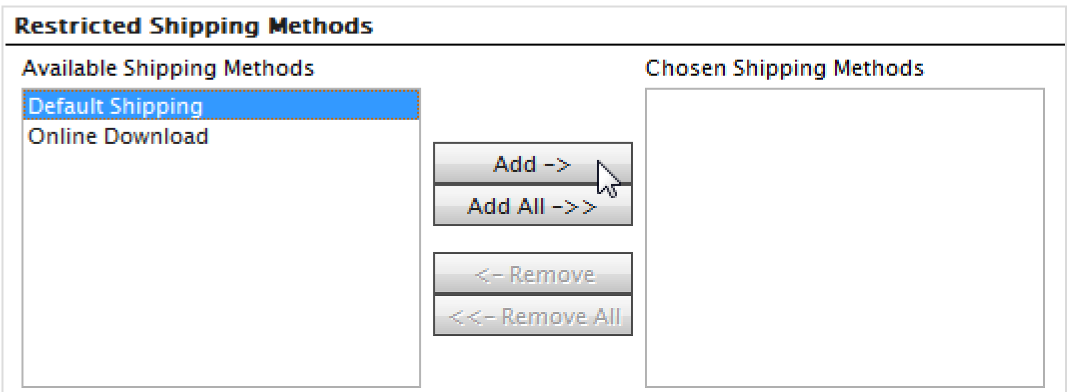


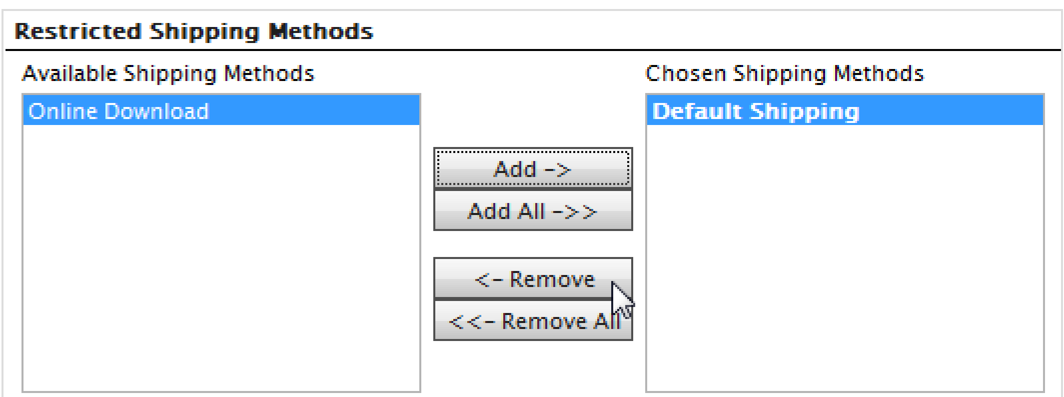
2. On the **Payment Methods** window, click **New** to create a new payment method. The **Payment Method Edit** screen appears.



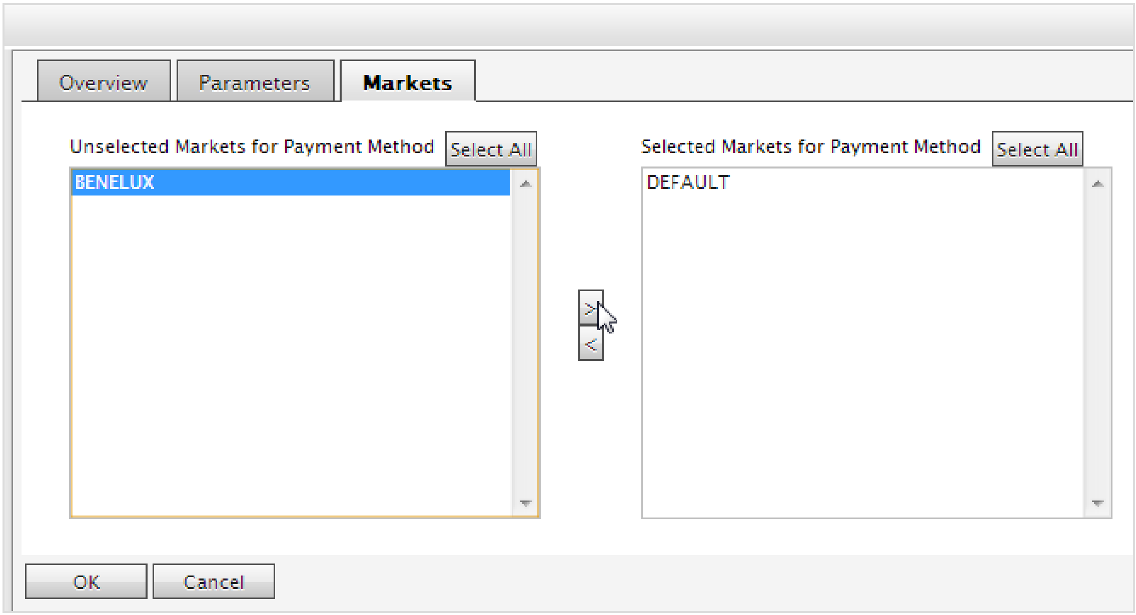
- **ID**. The system-assigned unique identifier for the payment gateway.
- **Name**. Enter the name displayed to the user.
- **Description**. Enter a description that appears to the user.
- **System Keyword**. Enter a unique name for each instance of the gateway; new non-unique keywords do not save to the database. This keyword is not editable after a gateway is created.

- **Language**. Select a language for the payment gateway.
- **Class Name**. Name of the gateway class to be associated with the payment.
- **Payment Class**. Name of the gateway payment to be associated with the payment.
- **Sort Order**. Enter a number to order the payment method on the list of payment methods page.
- **IsActive**. Select **Yes** to activate the payment method; otherwise **No**.
- **IsDefault**. Select **Yes** to make this payment method the default; otherwise **No**.
- **Supports Recurring**. Select **Yes** to support recurring payment, such as a subscription; otherwise **No**.
- **Restricted Shipping Methods**.





3. On the **Markets** tab, select the markets where the payment method are available. You must define a market before it can be selected.

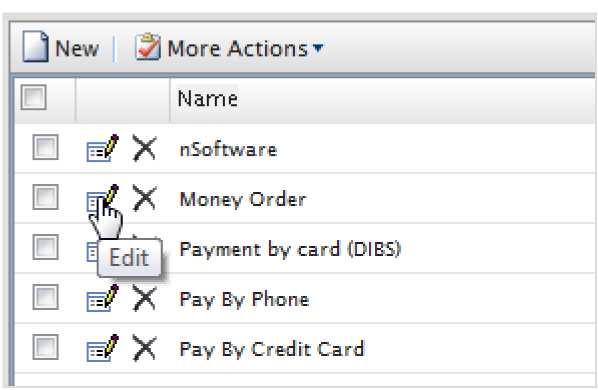


4. Click **OK**. The payment method appears in the list of Payment Methods.

> Note: For a payment method to appear it has to be **all** of: (1) assigned to the market, (2) assigned to a language that is valid for the market, **and** (3) assigned to a language that is valid for the site.

Editing payment methods

To edit an existing payment method, click **Edit**.



The **ID** is automatically generated. You can change the other fields (except **System Keyword**). Click **OK** to save your changes.

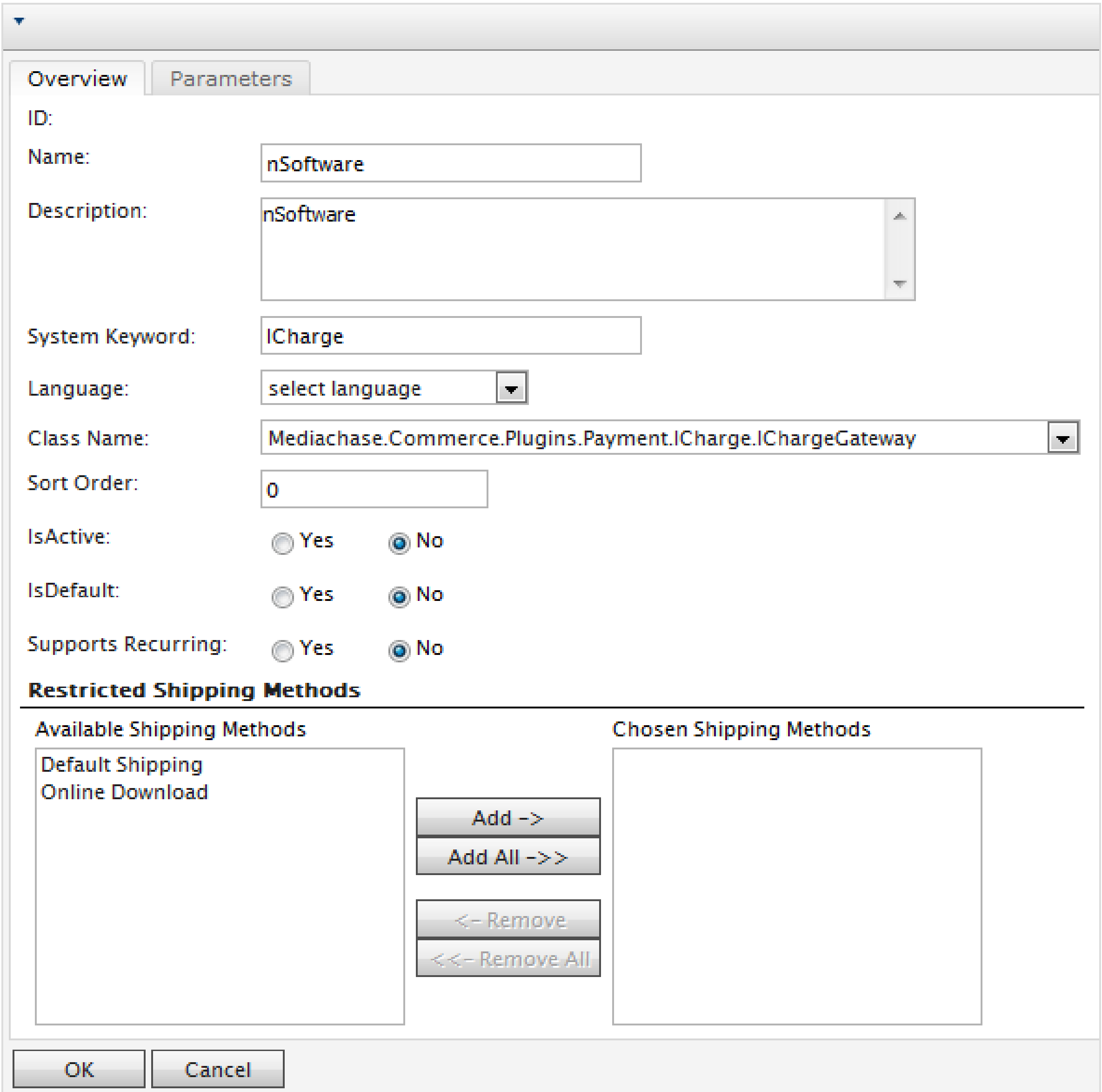
Deleting payment methods

To delete **Payment Methods**, click **X** and click **OK** to confirm.

To delete multiple payment methods at once, select each payment method you want to delete, then select **More Actions** > **Delete**. Click **OK** to confirm.

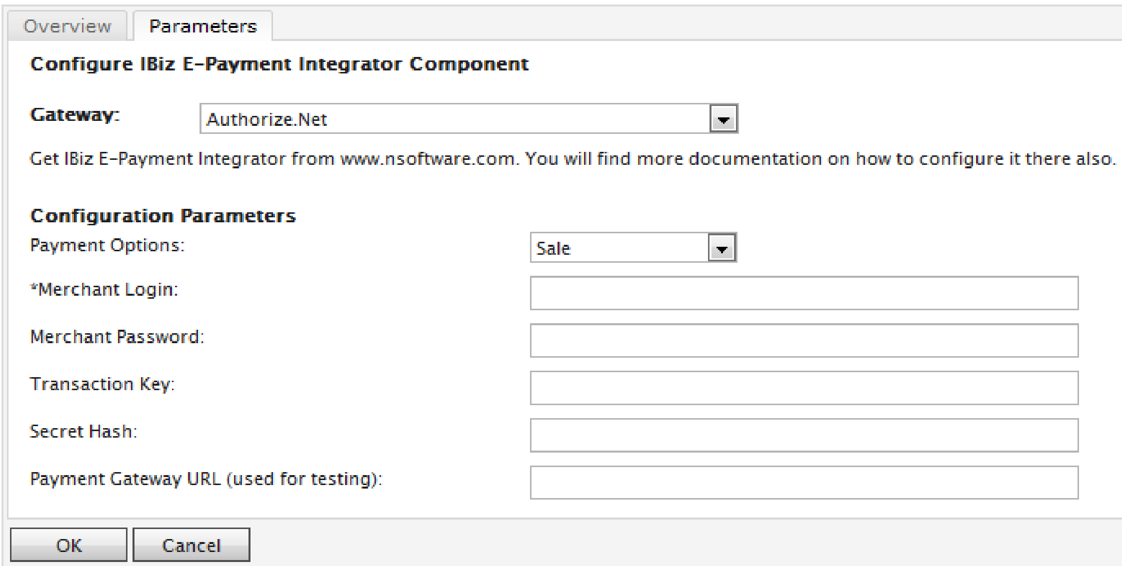
Using nSoftware-provided payment gateways

Episerver Commerce supports multiple payment gateways using **nSoftware** where an end user can set up a new payment method. The following procedure shows how to enable an nSoftware-supported gateway.



1. Create a new payment method.
2. Enter a **Name**, such as nSoftware.
3. Enter a **Description**.
4. Enter the **System Keyword** as **ICharge**.
5. Select a **Language**.
6. Select the **Class Name: Mediachase.Commerce.Plugins.Payment.ICharge.IChargeGateway**.
7. Select **Yes** for **IsActive**.

8. Change the **Sort Order**, **IsDefault**, and **Supports Recurring** as needed.
9. Click **OK** to save changes.
10. Click the payment gateway again to go back to the **Payment Method Edit** page.
11. Click the **Parameters** tab. The **Configure IBiz E-Payment Integrator Component** appears.



12. You can select from the most popular payment gateways in the **Gateway** drop-down list. The **Configuration Parameters** change depending on the gateway you select, such as Authorize.Net.
13. Enter your credentials and other relevant information to activate the gateway and click **OK.**

Shipping

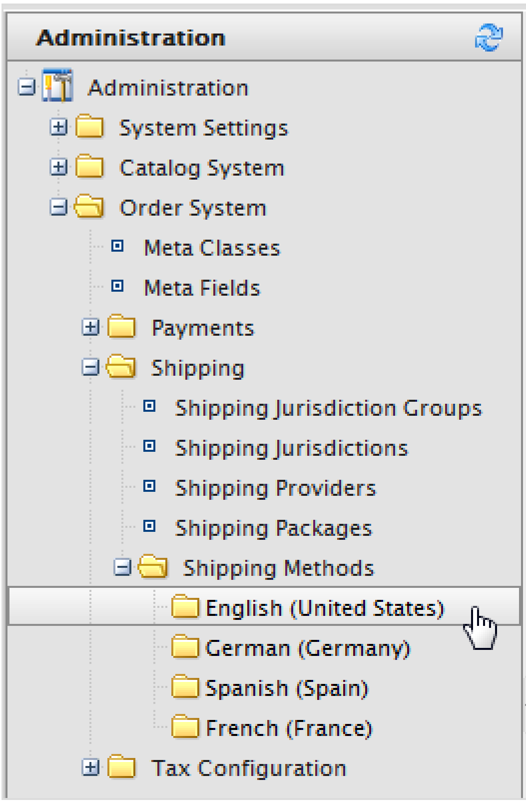
> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

Shipping is the physical delivery of product to e-commerce customers. Just as for payments, you can set up shipping methods and providers. Episerver provides the following shipping gateways:

- **Generic Gateway** (fixed shipping rate)
- **Weight/Jurisdiction** Gateway (base price + additional fee that is calculated based on the weight and shipping location)

To create a customized shipping gateway, see Shipping gateways and providers in the Developer Guide for Episerver Commerce.

To create a shipping method, open Commerce Manager and go to **Administration** > **Order System** > **Shipping**.



Shipping methods

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

A shipping method manages information and rules that determine shipping cost. The method is displayed on the front-end site when a customer adds an item to a shopping cart. The shipping cost is added to the total purchase price.

A shipping method is mapped to a shipping provider that is visible to a backend administrator in Commerce Manager. This mapping lets the public site display a friendly name to the customer, such as *Ground Shipping*, while connecting the method to a provider, such as *UPS*.

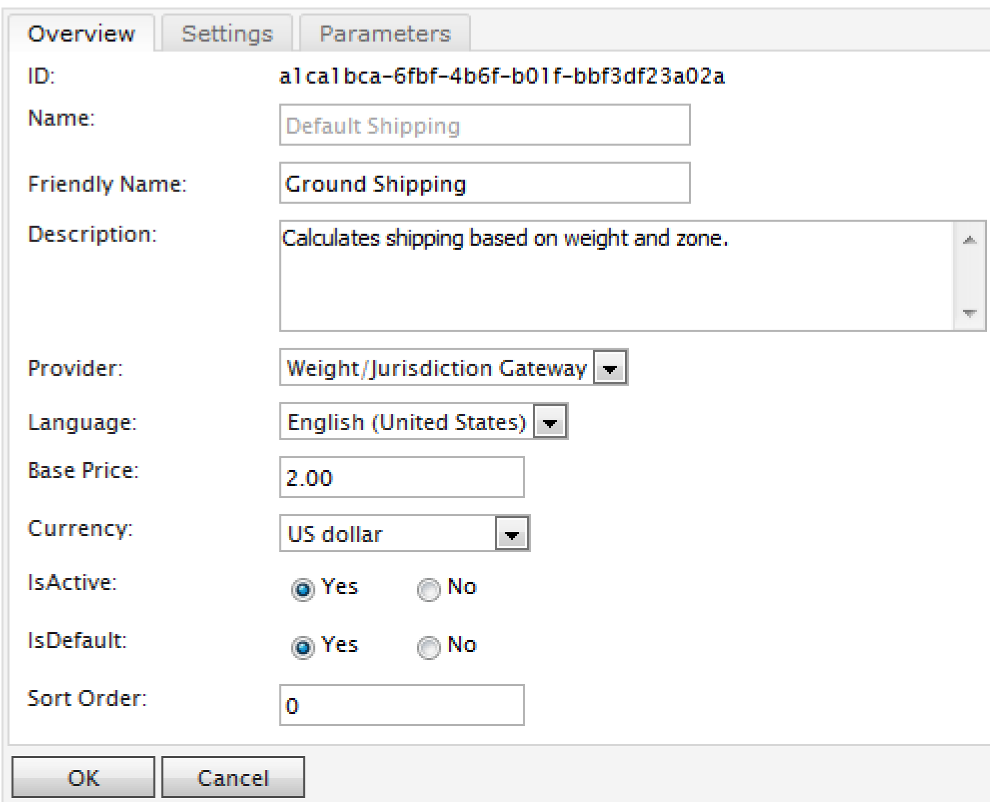
Customizing shipping methods

Episerver provides the following standard shipping methods.

- Ground Shipping
- Fixed Shipping

To create a custom shipping method, follow these steps.

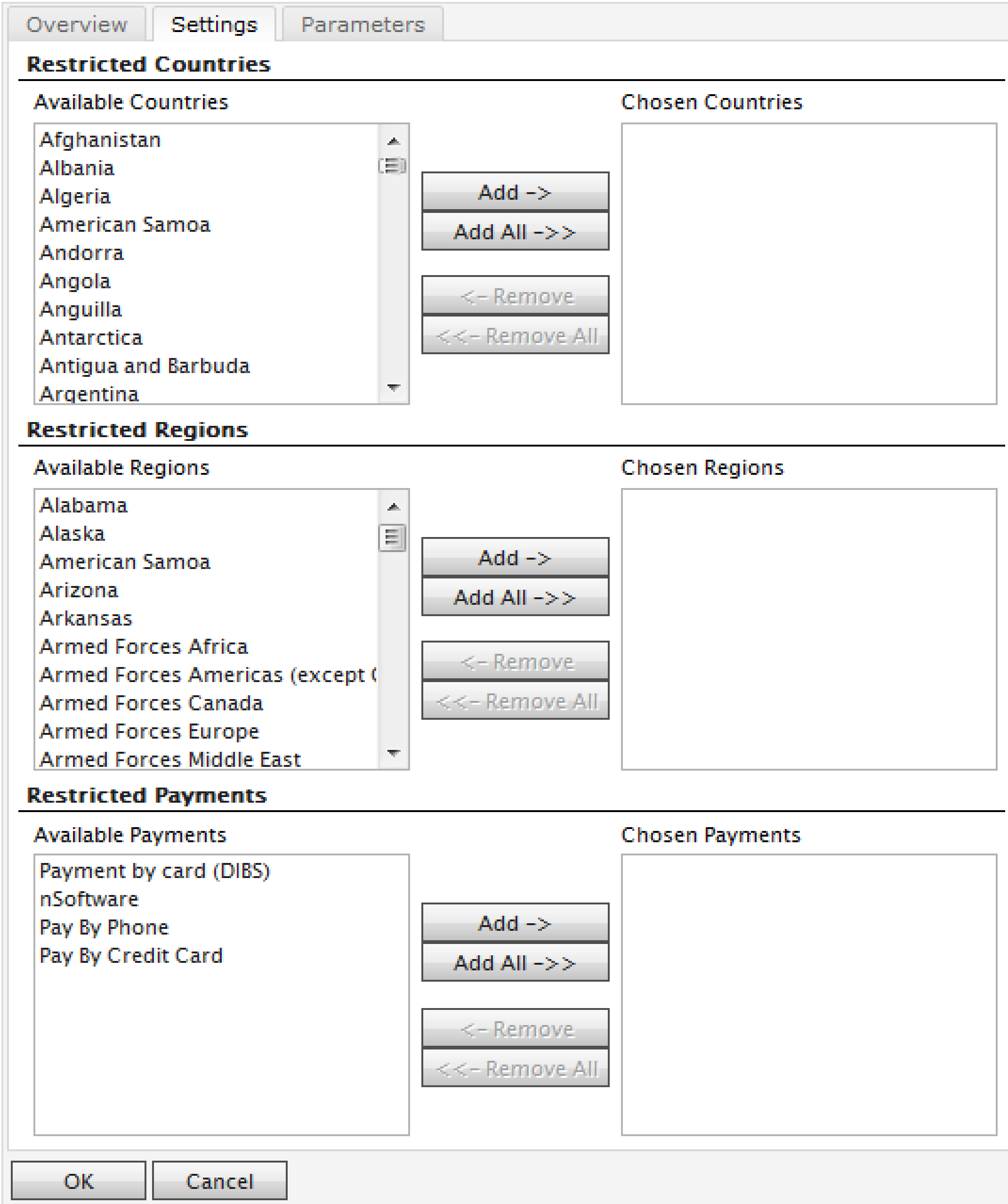
1. Go to **Administration** > **Order System** > **Shipping** > **Shipping Methods** > **English (United States)** or any other language. The **Shipping Methods List** screen appears.
2. Click **Edit** for the available methods. The **Overview** tab appears.



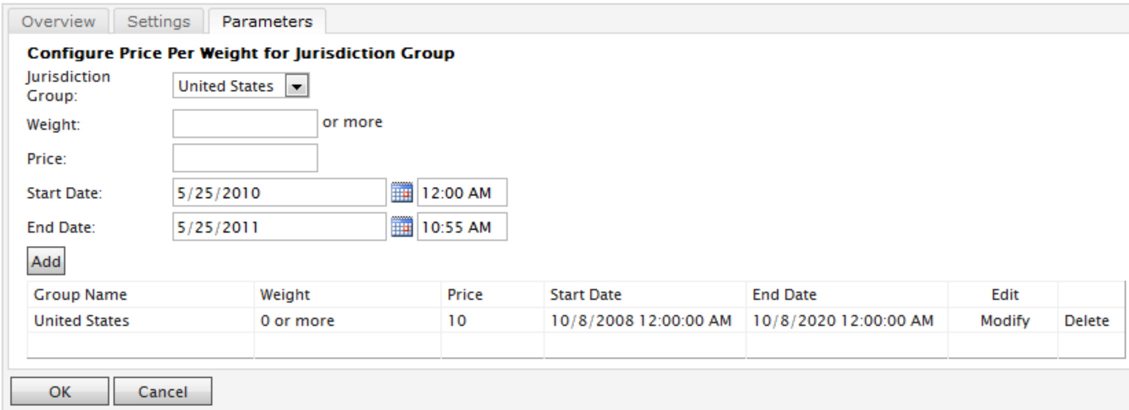
- **ID**. Automatically generated after saving the new shipping method.
- **Name**. Enter a name without spaces or special characters. The name is not displayed in the public site. Episerver Commerce users see the name when working with shipping methods.

- **Friendly Name**. Enter a friendly name, which is seen by customers when purchasing the item. It can have spaces and special characters.
- **Description**. Enter a description (optional).
- **Provider**. Select a provider, which is created in the Shipping providers screen.
    - Select **Generic Gateway** for a fixed shipping fee specified in **Base Price**.
    - Select **Weight/Jurisdiction Gateway** for a shipping fee calculated from the weight and shipping location.
- **Language**. Select a language.
- **Base Price**. Enter the base price that becomes the fixed shipping fee for the Generic Gateway option, or part of the Weight/Jurisdiction Gateway option.
- **IsActive**. Select **Yes** to enable the shipping method; otherwise **No**.
- **IsDefault**. Select **Yes** to make this shipping method the default; otherwise **No**.
- **Sort Order**. Enter a number to order the payment method on the list of shipping methods page.

3. Click the **Settings** tab to exclude countries, regions, and payments from a shipping method. To exclude a selection, highlight the items in the **Available** boxes on the left and click **Add** to move them to the **Chosen** boxes.



4. Click the **Parameters** tab to set conditions for the shipping fee. This screen only appears if you select the **Weight/Jurisdiction Gateway** in the **Provider** field in the **Overview** tab.



- **Jurisdiction Group**. Select a jurisdiction group to apply the current shipping method (for example, *United States*. You can set up the options on the **Shipping Jurisdictions** and **Shipping Jurisdiction Groups** screen.
- **Weight**. Enter a numerical value for the weight. You select the units for the weight in the Common Settings screen.
- **Price**. Enter a price that is added to the base price (**Overview** tab) when the weight and jurisdiction group conditions are met.
- **Start Date**. Enter a start date and time for the shipping method to take effect.
- **End Date**. Enter a end date and time for the shipping method to expire.

5. Click **Add** to save the condition.
6. Click **OK** to save changes.

Deleting shipping methods

1. Check box(es) next to the shipping methods you want to delete.
2. Select **More Actions** > **Delete**. You can also click **X** next to the shipping method to delete an individual method.
3. Click **OK**.

Shipping providers

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

A shipping provider class interacts with a shipping service, such as USPS, UPS, or FedEX by retrieving shipping price information. A provider can present specific scenarios with one or more services, such as price by weight or ground shipping.

The **Shipping Providers** page manages the list of providers and types.

Customizing a shipping provider

1. Go to **Administration** > **Order System** > **Shipping** > **Shipping Providers**. Edit one of the two providers listed.
2. Edit **Name** and **Description**.
3. **System Keyword (no spaces)** and **Classes** are something that your developers need to code and provide.
4. Click **OK** to save changes. The revised shipping provider appears in the **Shipping Providers** page.

> Note: The **Parameters** and **Packages** tabs are partially implemented to let developers fully customize those features.

Deleting shipping providers

1. Go to the **Shipping Providers** page.
2. Select the check box that corresponds to the shipping providers you want to delete. (You can also click **X** to delete an individual shipping provider.)
3. Select **More Actions** > **Delete**.
4. Click **OK**.

Configuring taxes

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

Configure taxes so that rates are calculated and added to the total price during the checkout process. You can combine and apply multiple taxes (such as federal, state and local tax) to a purchase. Set up and maintain taxes with the following methods:

- Creating or editing tax controls manually
- Importing data with a CSV file
- Exporting taxes to a CSV file

Configuring taxes manually

To set up your taxes manually, open Commerce Manager and go to **Administration** > **Tax Configuration** (**Tax Categories**, **Tax Jurisdiction Groups**, **Tax Jurisdictions**, and **Taxes**) and use the configuration pages for each catalog item.

1. **Create and configure Countries and Regions** (Go to **Administration** > **System Settings** > **Dictionaries** > **Countries**): In the Countries section, create the countries you plan to sell your products in and set appropriate country codes. For country codes, it is important to use the **ISO Short** code provided at MSDN site Table of Language Culture Name, Codes, and ISO Values Method [C++]. Using the **ISO Long** code or anything else does not correctly calculate taxes during checkout.
2. **Create new Tax Categories** (Go to **Administration** > **Catalog System**): Create tax categories that are used to associate your catalog items with the tax rates you define. For example, you create categories such as *General Sales*, *Food*, and *Luxury* Items depending on the tax regulations for your item types. The categories you create are selectable on the Page **Details** of your items (**Variations/SKU Edit** page) and on the **Tax Edit** page.
3. **Create and configure Tax Jurisdictions** (Go to **Administration** > **Order system** > **Tax Configuration**): Specify particular tax jurisdictions for a particular region by specifying zip codes, country codes, and so on. Tax rates are applied to whatever level of information you specify for each jurisdiction. For example, if you specify only the country code as US, customers with a US address (regardless of state, county and so on) are included in this jurisdiction.

    > Note: Country Code and Region Code that you enter in the **Jurisdictions Edit** page must match the codes you used in step 1.

4. **Create and configure new Tax Jurisdiction Groups** (Go to **Administration** > **Order system** > **Tax Configuration**): You can include multiple tax jurisdictions in the new Tax Jurisdiction Groups.
5. **Create and configure Taxes** (Go to **Administration** > **Order System** > **Tax Configuration**): Specify tax rates and also associate the Tax Categories and Jurisdiction groups created in Steps 2 and 4.
6. **Associate Catalogs to the Tax Categories** created in Step 2 (Go to **Catalog Management** > **Catalogs**): Go to the Catalog Management subsystem and link specific catalog items to the appropriate tax categories from the **Pricing/Inventory** page within each **Variation/SKU Edit** page.

Configuring taxes using CSV import

CSV Tax Import can update tax data in bulk. Creating a CSV tax file with a specified format (see Example Scenarios) lets you complete steps 2 through 5 of Configuring taxes manually in one shot. While you can complete step 6 of that procedure manually, you can also use CSV import in the Catalog Management subsystem to associate catalogs with tax categories.

To import your CSV tax file into Commerce Manager, follow these steps.

Prerequisite: A CSV tax file.

1. In Commerce Manager, click the **Administration** tab.
2. In the navigation tree, go to **Order System** > **Taxes Configuration** > **Taxes**.
3. Click **Import/Export** menu > **Import Taxes**.
4. Click **Add New File** and then **Browse** to select and upload your CSV tax file. The path of your chosen file appears in the field.
5. Click **Upload File** and then **Save The File**. The CSV tax file appears in the **Files Available for Import** section.
6. Select and highlight the CSV file and click **Start Import**. The import process begins and completes in a dialog box. You can now view your tax setup in the Commerce Manager.

To edit the existing setup, repeat the steps with a modified CSV file.

> Warning: Re-importing a CSV file only edits existing information or adds new data - nothing is deleted. If you delete an entire row of data in the CSV file, you must manually delete those entries in the Commerce Manager. You can delete all the tax data and perform the CSV tax import from scratch.

Exporting taxes to a CSV file

CSV Tax Export can extract selected tax data from Episerver Commerce to a CSV file. You can use the file to copy tax data among sites. The format of CSV file matches the CSV file used to import taxes.

To export tax data from Commerce Manager, follow these steps:

1. In Commerce Manager, click the **Administration** tab.
2. In the navigation tree, go to **Order System** > **Taxes Configuration** > **Taxes**.
3. Select the tax value that you want to export.

4. Click **Import/Export** menu > **Export Taxes**.
5. Click **Start Export**.
6. The export process begins and completes in a popup dialog box. You can download or delete the CSV file.

The exported taxes CSV file appears in the Exported Files List, located in *[App_Data] \ImportExport\[ApplicationName]\taxexport* .

Sample CSV files and scenarios

Example 1: Single tax per catalog item based on a single jurisdiction

If your variable is State, then you can specify the tax rate on a state-level. For example, CA is 9% and MA is 6%. If you placed an order from California, then 9% sales tax is applied during checkout.

Jurisdiction	Jurisdiction Group	Tax Rate	Tax Category
California	CA Tax Group	9%	General Sales
Massachusetts	MA Tax Group	6%	General Sales

See TaxCSVSample1.csv in this sample .zip file.

Example 2: Two or more taxes per catalog item based on more than one jurisdiction

If you have a luxury item that requires State and Federal tax, then you can specify tax rates on a state and federal level. For example, a luxury item purchased in CA has a 9% state tax rate and a federal tax rate of 3%. Both taxes are applied during checkout.

Jurisdiction	Jurisdiction Group	Tax Rate	Tax Category
California General	CA GS Tax Group	9%	General Sales
Massachusetts General	MA GS Tax Group	6%	General Sales
California Luxury	CA LX Tax Group	9%	Luxury Sales
Massachusetts Luxury	MA LX Tax Group	6%	Luxury Sales

Jurisdiction	Jurisdiction Group	Tax Rate	Tax Category
US Federal Luxury	US LX Tax Group	3%	Luxury Sales

See TaxCSVSample2.csv in this sample .zip file.

Example 3: Tax CSV file with tax type specified

You can specify the tax type. Episerver provides **Sales Tax** and **Shipping Tax**.

Jurisdiction	Jurisdiction Group	Tax Rate	Tax Category
California	CA Tax Group	9%	Sales tax
Massachusetts	MA Tax Group	6%	Shipping Tax

See TaxCSVSample3.csv in this sample .zip file.

Order meta-classes and meta-fields

> Note: This topic is intended for administrators and developers with administration access rights in Episerver.

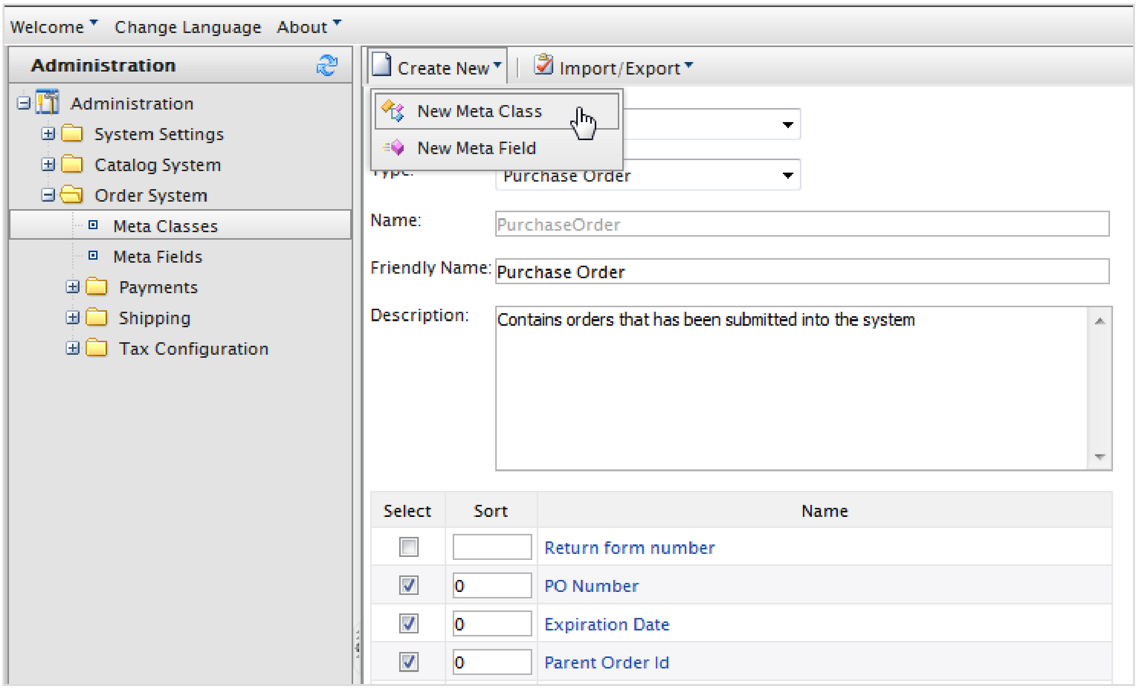
You can extend the metadata of catalog items and order forms. For example, if you create a meta-class called *Wine*, add meta-fields that are characteristic for wine, such as *color*, *taste*, *vintage*, and *maturity*.

> Note: Default order meta-fields that are used by the ordering process are built into the system and are not available from the administration interface. However, you can add your own meta-fields to extend the attributes of your orders.

Creating an order meta-class

1. Navigate to **Administration** > **Order System** > **Meta Classes**. The **Meta Classes** page appears.

2. Select **Create New** > **New Meta Class** and fill in the fields.



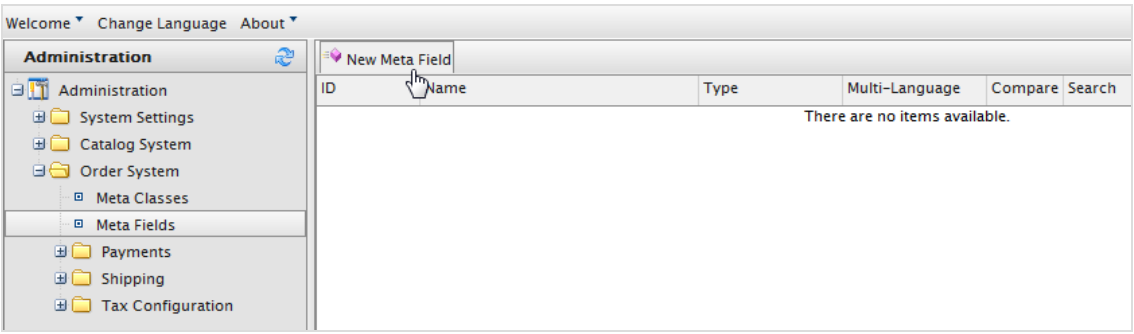
- **Name**. Enter the name of the meta-class used in your code, this cannot have any spaces.
- **Friendly Name**. Enter the name of the meta-class displayed for practical use in Order Management.
- **Description**. Enter a description of the meta-class.
- **Object Type**. Select **Order Group**, **Order Form**, **Shipment**, **LineItem**, **Order Group Address**, or **Order Form Payment**.

3. Select **OK**. The newly created meta-class appears in the **Type** drop-down list.

If you select the meta-class, you see available meta-fields listed but with none selected.

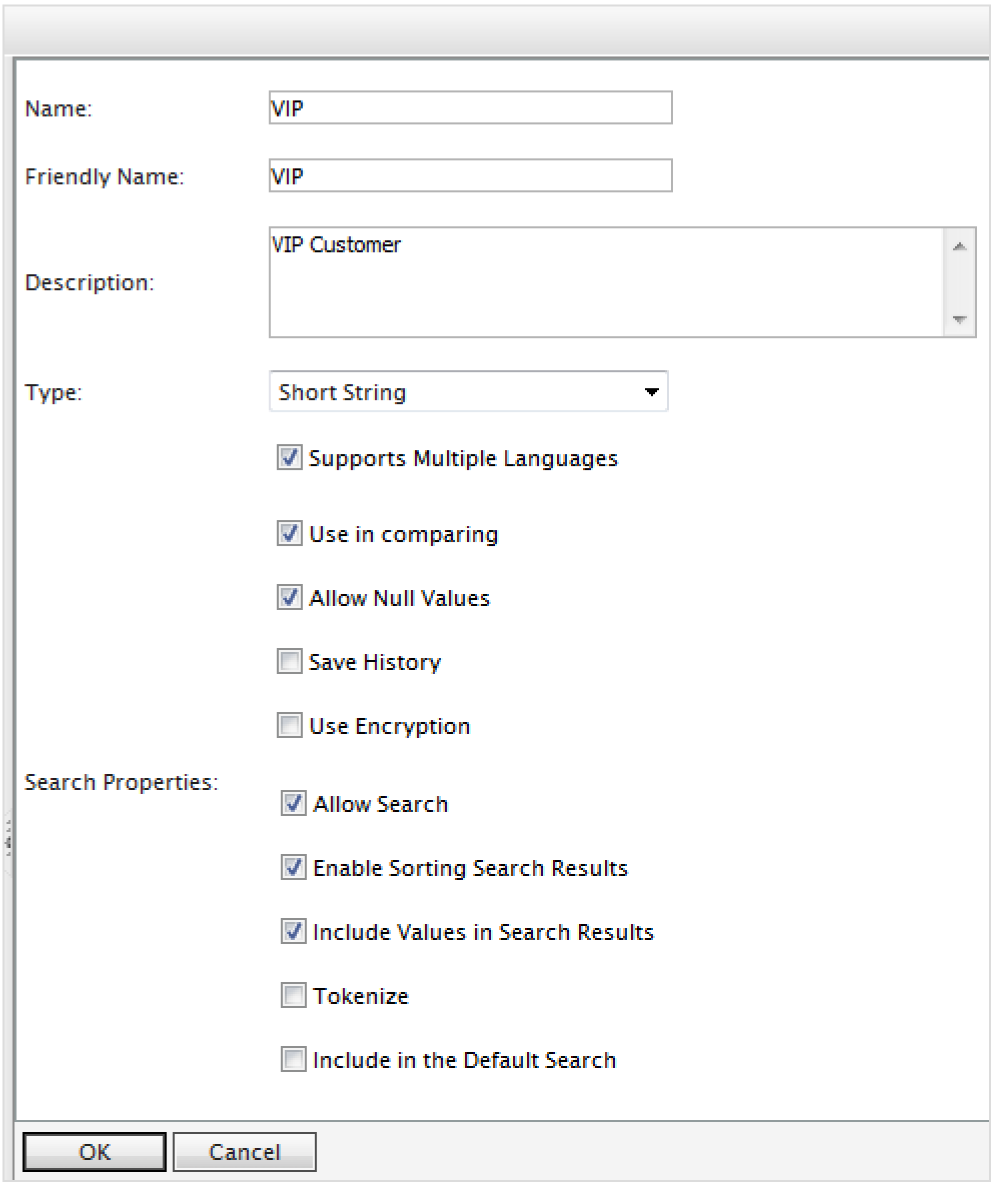
Creating an order meta-field

1. Go to **Administration** > **Order System** > **Meta Fields**. The **Meta Fields** page appears.
2. Select **New Meta Field**. The Meta Field edit page appears.



You can also select **Create New** > **New Meta Field** on the **Meta Classes** page.

3. Enter **Meta Fields** details.



- **Name**. Enter a system name without spaces or special characters (such as **NumberMegapixels**).
- **Friendly Name**. Enter a user-friendly name seen by end-users on the back and front-end (such as **Number of Megapixels**).
- **Description**. Enter information about the meta-field.

- **Type**. The drop-down list shows the following field types.
  - datetime
  - decimal
  - float
  - money
  - Integer
  - Boolean
  - Date
  - Email
  - URL
  - Short String
  - Long String
  - Long Html String
  - String Dictionary
  - File
  - Image File
  - Dictionary (single and multiple line dictionary type option selector)
  - **Supports Multiple Languages**. Select if the meta-field can appear in two or more languages.

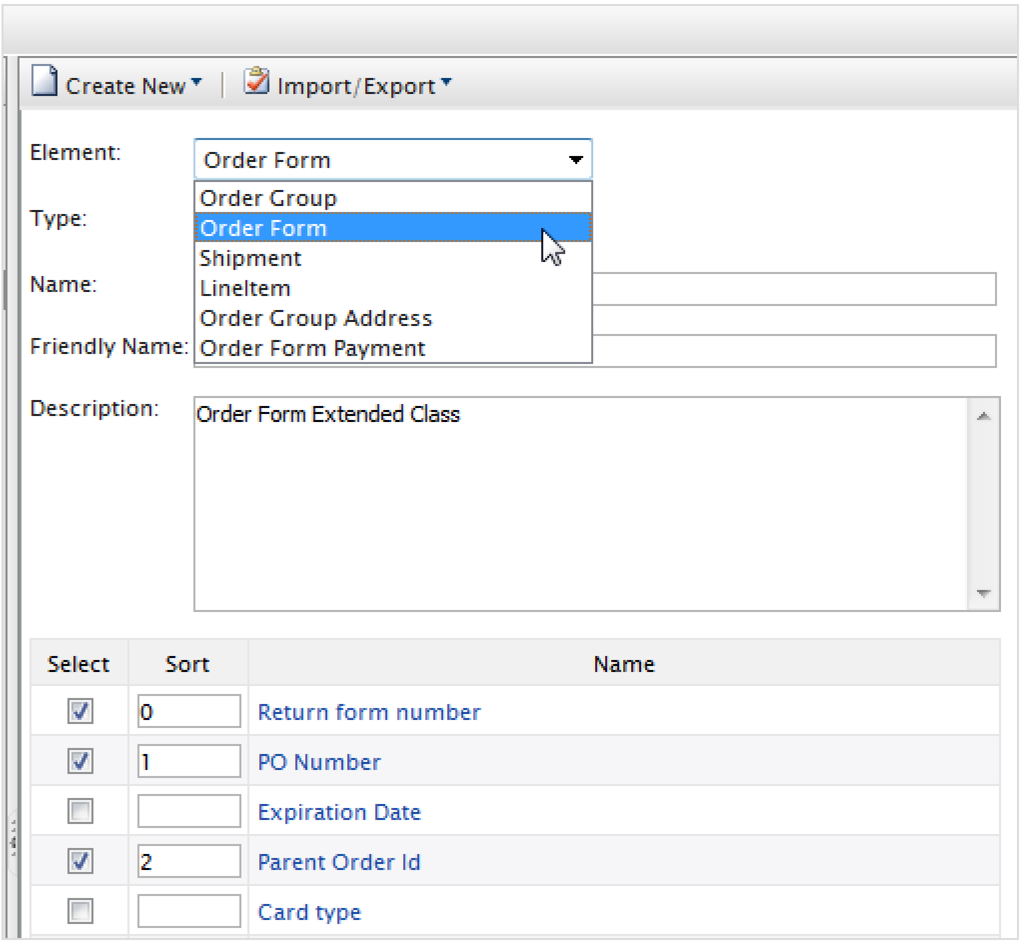
    Use in comparing. Select to compare items (only works if you have compare functionality on the front-end site).
  - **Allow Null Values**. Allows a null value for this field.
- **Search Properties**. Depending on the data field type selected, you may have the option to set the search properties of the data field. The options are:
  - **Allow search**. Select the box to permit searching on this meta-field.
  - **Enable Sorting Search Results**. Select the box to enable sorting of search results on this meta-field.
  - **Include Values in Search Results**. Select the box to include the original value of this meta-field in the search results.
  - **Tokenize**. Select the box to prepare individual words (word breaking) in a long product description property.
  - **Include in the Default Search**. Select the box to tokenize and combine meta-field values for search from the front-end site.

4. Select **OK**. The newly added meta-fields are listed in the meta-fields list.

> **Tip**: If newly created meta-fields are not immediately visible, go to the next page or set the **Page Size** to display more entries.

Applying meta-fields to a meta-class

1. Go to **Administration** > **Order System** > **Meta Classes**. The **Meta Classes** page appears.
2. Select **Element** > **Catalog Entry**.
3. Select the desired meta-class from the **Type** drop-down list. The **Name**, **Friendly Name**, and **Description** fields are populated with default values.
4. Apply a meta-field to a meta-class by selecting the check box next to the meta-field. If you want to sort the order of the meta-fields in the catalog entry, enter a number into the **Sort** field.



5. Click **OK**.

Scheduled jobs

> **Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

A scheduled job performs a specific task automatically when set to a date and time. An administrator can manually execute a scheduled job at any time. See Scheduled jobs in the CMS Administrator User Guide.

The following Commerce scheduled jobs are available via the administration interface.

Subscription payment plans

Ensures that recurring payments are regularly generated as a background process. Used for payment plans, such as magazine or grocery subscriptions, generating recurring payments.

Remove expired carts

Removes carts that are *expired*, that is, not accessed for a specified number of days. The default is **30**. You can configure this value in the appSettings file's **ExpiredCartJobDays** property.

You can also control the name of cart to be excluded from removal via the appSetting **episerver:ExpiredCartsRemovalJobExcludedCartName**. The default value is "Wishlist".

Full search index

Performs a full indexing of content in product catalogs.

Incremental search index

Performs an incremental indexing of content in product catalogs.

Draft store migration

Used for migration of previously published content versions, when upgrading to the version management introduced with Commerce 9. See Episerver World for technical details.

Find catalog URI conflicts

Analyzes the database to find entries and categories that have the same **Name in URL** under the same parent category. If conflicts are found, they are logged as warnings, output to the Scheduled Job Log, and sent to email addresses specified in the **episerver:commerce.UriSegmentConflictsEmailRecipients** AppSetting. For details, see URL segment and SEO URL.

Shipment releasing

Searches for releasable shipments in active orders. If the difference between the shipment creation time and the current time is greater than the configured time span, the order's shipment status is changed to **Released**.

By default, this job is not active. If the job is active, order shipments are released one day after an order is placed by default. A developer can change the default value in the <*Siteroot*>/*Configs*/*ecf.order.config* file by editing the **shipmentAutoReleaseTimeout** element.

Rotate encryption keys

Sensitive customer data is secured with encryption keys that are set in meta-fields. This job rotates the encryption keys used by the system. See Episerver World for technical details.

Export product feed

Exports your product feed (catalog) to Episerver Product Recommendations to provide accurate and valuable recommendations.

Export product feed incrementally

Exports your product feed (catalog) to Episerver Product Recommendations incrementally. This job keeps Episerver Personalization up-to-date with product changes without exporting the entire catalog.

Because this job only exports added/updated products, it provides better performance and is faster than the Full Export Catalog Feed job. So, it can be run more frequently. But, the incremental job does not replace the Full Export Catalog Feed job because it excludes the deletion of products and edits to asset and inventory information.

Maintain database indexes

To reduce fragmentation in the CMS and Commerce database indexes, this job rebuilds or reorganizes them. You can run the job manually any time that you notice a degradation in performance. Or, you can schedule it to run at regular intervals.

> Note: Run this job at times of low usage if possible.

Further, you can set the following parameters to launch the job automatically when specified fragmentation levels are met.

When the job is launched (manually or automatically), it rebuilds or reorganizes depending on the current fragmentation percentage.

Parameter	Description	Default value	To change default
HighFragmentationThreshold	If the `avg_fragmentation_in_percent` of an index is larger than this value, the index is *rebuilt*.	30%	Add a setting to the web.config's appSettings section using the key `episerver::HighFragmentationThreshold`.
LowFragmentationThreshold	If the `avg_fragmentation_in_percent` of an index is larger than this value, and smaller than or equal to HighFragmentationThreshold value, the index is *reorganized*.	10%	Add a setting to the web.config's appSettings section using the key `episerver::LowFragmentationThreshold`.
DataBaseIndicesJobCommandTimeOut	The maximum number of seconds for which you want the job to run. If the job does not finish within that time, an exception is generated.	30 seconds	Add a setting to the web.config's appSettings section using the key `episerver::DataBaseIndicesJobCommandTimeOut`. Within this appsetting setting, set the `value` to the maximum number of seconds for which you want the job to run.

Export product data to Episerver Campaign

This job collects product data and saves it to a .csv file for transfer to Episerver Campaign. For more details about this process, see Commerce-Campaign integration.

Collect report data

This job compiles the data used in the Sales By Day report (Beta).

Remove old Service API uploaded files and directories

> **Note:** This job is only available after installing the Service API.

This job removes temporary uploaded files and directories that are older than a number of configured days.

The configuration setting is web.config file > **appSettings** > **episerver:serviceapi:uploadRetentionPeriod**. If there is no configuration value, the default is 30 days.

Background: Developers can use the Service API to import large files, such as Commerce catalogs. The Service API provides a method for deleting uploaded files that are no longer needed. Use this scheduled job to clean up obsolete files in case a developer overlooks the Delete chunk uploaded method.

Collect orders per promotion statistics

Background information

The Marketing screen displays all campaigns. For each campaign, the screen displays

- its discounts
- the number of orders that use each discount
- the total number of orders that include discounts

The scheduled job **Collect Orders Per Promotion Statistics** reworks the collection of these statistics to improve performance.

Using the scheduled job

To migrate your promotions system to the new optimization, run the Commerce scheduled job, **Collect Orders Per Promotion Statistics**. If campaigns have too many orders, you may get a timeout exception when running the job. If you do, add an appSettings key named `episerver:commerce.OrderPerPromotionReportDataTimeout`, and set the timeout in seconds.

By default, this optimization ignores inactive and expired campaigns and promotions (although they are migrated along with active campaigns and promotions). If you want to force the refreshing of their data, add an appSettings key named `episerver:commerce.ReportForInactivePromotionItems` and set it to **true**.

Managing content

Content on an e-commerce website is usually products from the product catalog, which are exposed through types of categorization, faceted navigation or filtering.

In Episerver Commerce, content is information entered into CMS pages and blocks, and information related to e-commerce catalog entries such as categories, products and variants. Catalog content often is based on data retrieved from external systems.

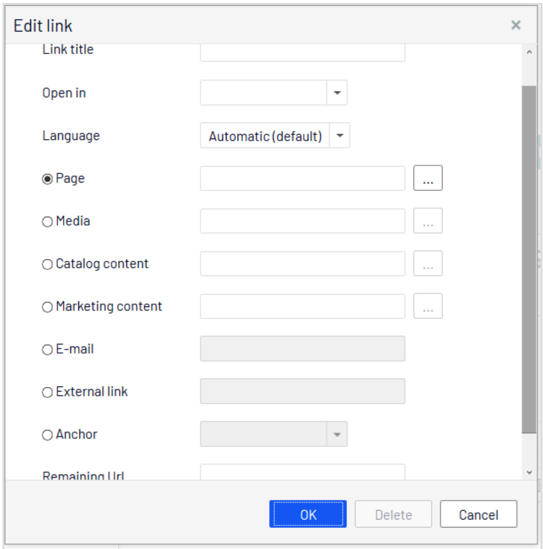
Different user groups update content. For example, merchandisers organize the product catalog, manage pricing and enrich the product information, whereas marketers and editors create campaign pages and promote products.

Catalog content

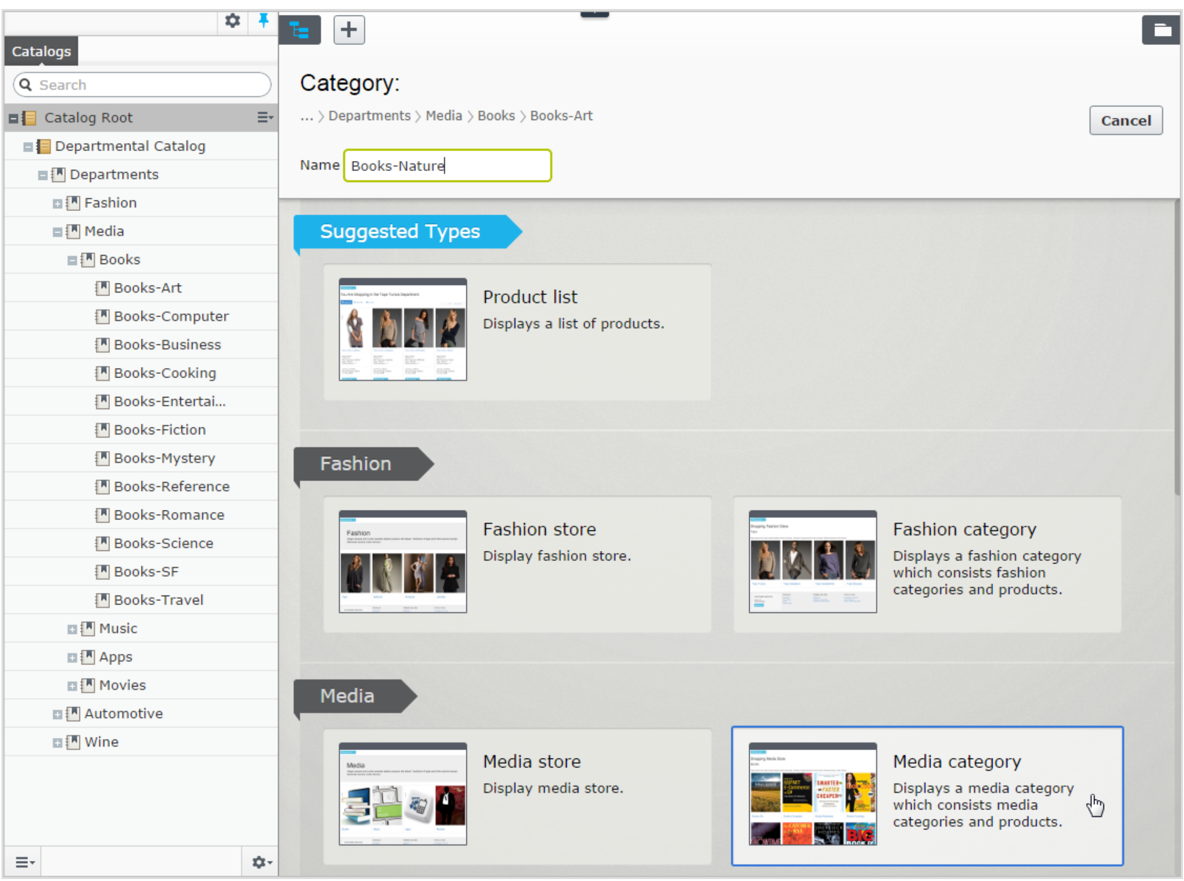
Catalog content consists of various types of catalog entries, such as categories, products, variants, package and bundles. The **Catalog** view lets you:

- Create new categories and add products and variants to these in the product catalog structure. See Working with categories.
- Browse the catalog tree to see the structure of catalog entries, and the content types on which they are based.
- Create relationships between catalog entries using drag-and-drop functionality.
- Edit catalog entries such as categories, products and variants from the **On-Page Editing** or the **All Properties** editing views.
- Add text, media such as images and videos, and links to properties in different content types such as adding a product description. See Managing content in the CMS Editor User Guide.
- Manage pricing across products, markets and customer groups, compare prices filtered by markets and customer groups, and make adjustments as needed. See Managing pricing.
- Create a link to an entity in the product catalog using the Link tool. From the Create Link dialog in the editor or a link property in the content, you can create a link to a catalog, a category, catalog entry, or a variant.

- Create a link to a marketing campaign or promotion using the **Marketing content** field.

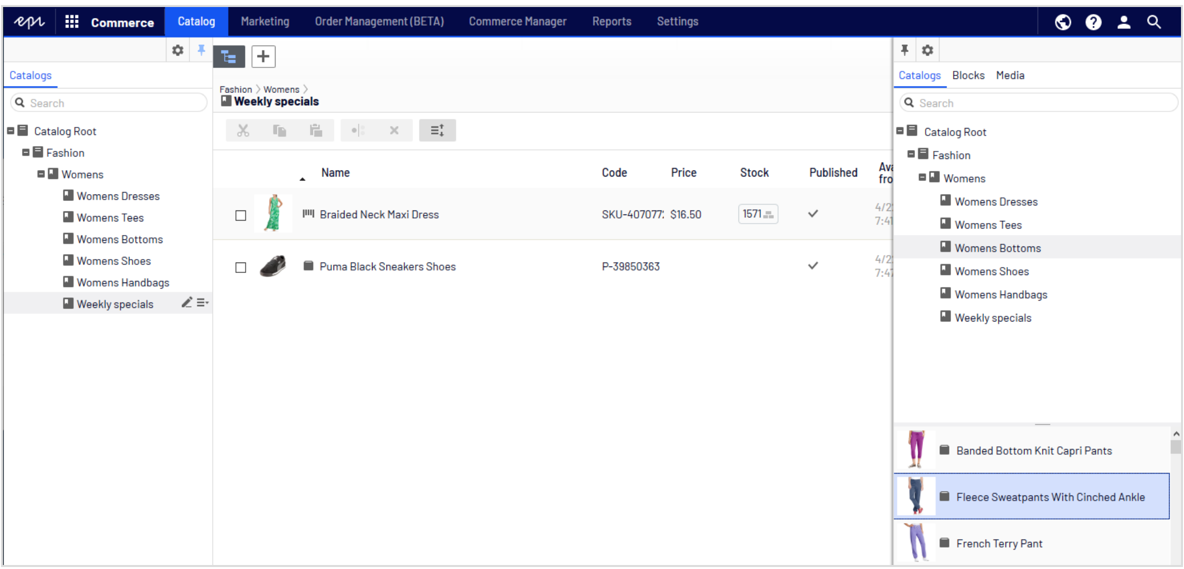


- Publish changes directly on the website, or schedule it for later publishing.



Catalogs gadget

You can access the **Catalogs** gadget in the CMS and Episerver Commerce asset pane. Use the gadget to drag catalog entries into the rich-text editor or a content area of a CMS page or block, to display and promote product information, such as a campaign page.



You can also use the **Catalogs** gadget to create relation links between catalog entries by dragging catalog items into the **Relations** tab of other catalog entries. See Related entries.

> Note: To properly display product information when used in other types of content, the rendering templates must be adapted to display catalog content.

Episerver Commerce-specific gadgets

This legacy section is being retired. If you want to read the Episerver Commerce Orders gadget (Legacy) documentation, see version 19-2, or earlier, of the user guide.

Multiple language content

E-commerce businesses often exist in multiple markets that require your website to be available in several languages. You can manage catalog content in multiple languages, and also activate multiple languages for the Episerver Commerce user interface. See Multi-language management.

Personalized content

The personalization feature in Episerver CMS targets content to specific visitor groups. For example, you can design campaigns based on recent orders or the total spent amount for a customer. The personalization option is available in the rich-text editor, and is also applied to available block on your website. See Commerce personalization criteria.

Episerver Search & Navigation and best bets for catalog content

If you have Episerver Search & Navigation (formerly Episerver Find) installed on your website, you can promote content in your product catalog by adding best bets to the search results. See Episerver Search & Navigation.

Managing languages in Episerver Commerce

Usually, a website has a default or *master* content language set up during installation. You can set up languages for catalog entry content, such as product (SKU) descriptions, for your website at the catalog level. This means that when you configure a language for a catalog, you define catalog entry descriptions in that language.

To work with multiple languages for Episerver Commerce content, first enable the languages in the CMS admin and edit views. Next, language-specific fields appear, ready for translation in edit view; product descriptions that are not yet translated appear empty if they are displayed on the front-end site.

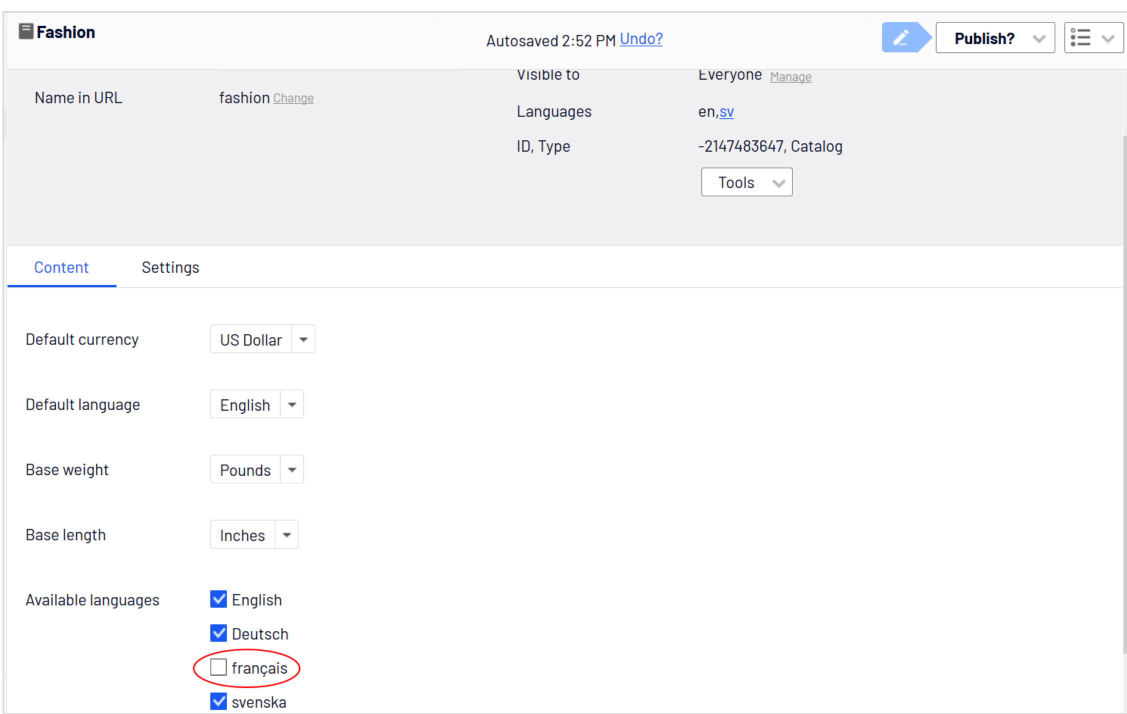
Translating catalog content is similar to translating CMS content, such as pages and blocks. Episerver uses specific language settings for catalogs, markets, and payment and shipping methods in Episerver Commerce.

Enabling a language for catalog content

1. Activate the language in the CMS admin and edit view, as described in Managing website languages.

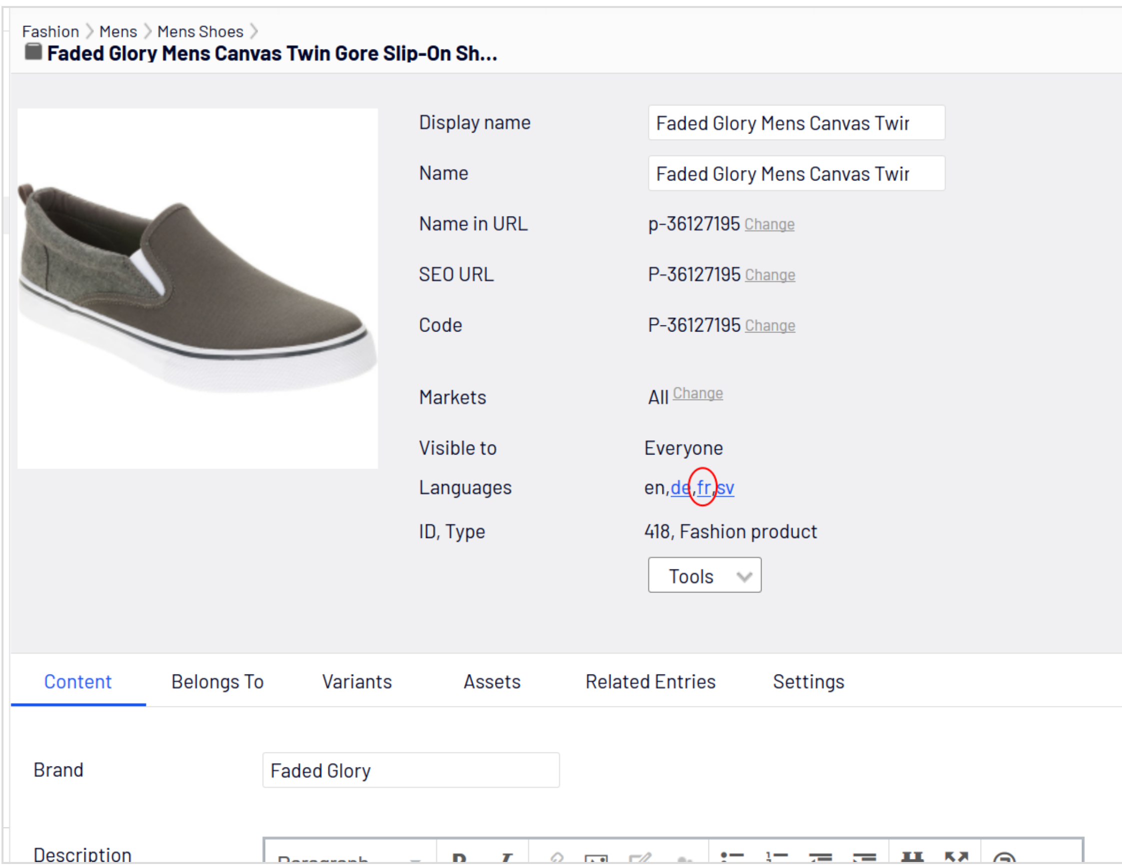
   > **Note:** Enable the language in edit view to make it available for editors to translate content, *and* to make the website's start page available in that language, for proper display of translated content.

2. Enable the language for the catalog to which you want to apply the new language:
   a. In the **Catalog** edit view, open the catalog for which you want to add a language in the **All properties** editing view.
   b. In **Available languages**, select the newly-added language.
   c. Publish the catalog changes.



Translating content for catalog entries

1. In the **Catalog** view, select the desired catalog entry to translate in the catalog tree.
2. Click **Edit** in the context menu for the selected entry, or select the entry to open the **All Properties** editing view.
3. In the header next to **Languages**, select the desired language for translation. (Enabled languages are listed.).



4. Edit the available properties, and follow the content publishing flow to save and publish the translated catalog entry information.

> Tip: When you translate content, have the original content open in another browser window for comparison. You can also copy and paste the original content into the text area where you are working, as reference.

Switching language and viewing language versions

When editing translated content in the All properties editing view, you can switch languages by selecting the desired language in the **Header**. The user interface reloads, displaying the content in the selected language. See Translating content.

Editing global properties

Depending on your implementation, some properties may be globally shared and can only be edited in the master language. See Translating content.

Setting the user interface language

- To set the user interface language for **Catalogs** and **CMS**:
  1. Select your user profile name in the upper right corner.
  2. Click **My Settings** then the **Display Options** tab.
  3. Select the language of your choice and click **Save**.
- To set the user interface language for **Commerce Manager**:
  1. In the upper menu of Commerce Manager, click **Change Language**.
  2. Select the language.
  3. Click **OK**.

Commerce-specific criteria

Episerver Commerce provides custom visitor group criteria so you can personalize content based on product and order information. Personalization helps you to strategically sell exactly the right products to the right customers, instead of showing the same products to everyone.

> Note: You need administration access rights to create and edit a visitor group. Existing visitor groups are available for editors in edit view.

To see available visitor groups, in the top menu, click **CMS** > **Visitor Groups**. Click **Create** to define a visitor group. Then add personalization criteria as desired.

Personalization examples

You can use Visitor Groups to determine which content is appropriate to show. If you use a CRM system with segments to guide your business practices, duplicate this segmentation in Episerver Commerce via Visitor Groups. Then, create a special home page for each customer segment.

As another example, create visitor groups that place customers in vertical segments, such as service stations, car repair shops, spare parts dealers, and so on. If product data is maintained in Episerver, different customers should see different product descriptions. A retail customer (service station) could see primarily commercial data about a product, while an end-user (car repair shop) would see technical details about the same product. So, you can use visitor groups to optimize the user experience by meeting the unique needs of each customer.

Commerce-specific criteria

These criteria are available by default in an Episerver Commerce installation, in addition to the CMS-specific criteria. See also: Visitor groups in the CMS Administrator User Guide.

- **Customer properties**. Personalize content based on age or geographic location:
  - **Date of Birth**. Format mm/dd/yyyy.
  - **Customer group**. Select **Customer**, **Partner**, or **Distributor**.
  - **Registration source**. Enter the source of registration.
  - **Country**. Select a country from the list.
  - **Region code**. Select a region code based on the address region in addresses.
  - **Address postal code**. Select a postal code from the list (based on state selected).
  - **State**. Select a state from the list.

  > Note: You can select only one property type with a related value for a criterion, but you can define several customer properties criteria for a visitor group.

- **Market**. Personalize content based on the market to which a visitor website belongs.
  - **Market**. Select a market.

- **Recent Orders**. Personalize content based how often a customer orders:
  - **Order times**. Select the number of times an order is placed.
  - **Number of days**. Select the number of days over which the number of orders must occur. For example, 4 times in the last 2 days.
- **Product in cart or wish list**. Identify customers that have placed a product of a certain type or brand in their cart or wish list.
  - **Specified product code**. Enter the desired product code.
  - **Product from a specified category**. Select the desired product category.
  - **Product has a specified property and value**. Enter the desired product property and value, such as *brand* and *Sony*.

  > Note: You can select only one property type with a related value for a criterion, but you can define several add several criteria of the type **Products in Cart or Wish List** to a visitor group.

- **Total spent**. Personalize content for visitors who spent a specified amount of money (in a specified currency) on the site in the last number of days.
  - **Spent at least**. Select amount and currency.
  - **Number of days**. Select the number of days.

How visitor groups are used

When creating a campaign, you can limit it to members of selected visitor groups.

Episerver Commerce gadgets

This legacy section is being retired. If you want to read the Episerver Commerce Orders gadget (Legacy) documentation, see version 19-2, or earlier, of the user guide.

Access rights

This section describes how to manage access rights for users such as administrators, marketers, and merchandisers working in Episerver Commerce. When a user is created, you assign appropriate access rights depending on whether the user will work with CMS, catalog content, Commerce Manager, or all parts.

> Note: To manage users and access rights, you need administrative access rights in CMS. This description refers to a default implementation of Episerver Commerce. Your website may be configured differently, and have customized user and user group management.

Managing users and groups

You manage which users can access various parts of the system from the CMS admin view.

For easier and safer maintenance, it is recommended to base access rights on groups rather than individual users. Then, provide access rights to users by adding them to appropriate groups. See Managing users and user groups in the CMS Administrator User Guide.

> Note: Be aware that both contacts (visitors registering on your public site or manually created in Commerce Manager) and system users created from the CMS admin view are visible in the same listing in CMS admin view and Commerce Manager. By default, contacts belong to the "Everyone" and "Registered" groups.

Groups and access rights

In addition to the **default groups** described in Access rights in the CMS Administrator User Guide, Episerver Commerce has its own groups that you use to assign access rights for Commerce functions.

You must manually create the **CommerceAdmins**, **CommerceSettingsAdmins** and **CatalogManagers** groups before adding users to them. To do this, go to **CMS** > **Admin** > **Access Rights** > **Administer Groups**.

CMS groups for controlling access to Episerver Commerce

Group	Provides access to	Comment
Administrators	All parts of the system, including Administration in Commerce Manager.	Usually restricted to developers for implementation and maintenance. A built-in user group created when Episerver CMS is installed.
WebAdmins	• All editing and administration views in Episerver CMS and Episerver Commerce. • All parts of Commerce Manager except Administration.	Usually restricted to very few users. A built-in user group created when Episerver CMS is installed.
WebEditors	The ability to edit Episerver Commerce content. Required for all users (if not members of WebAdmins or Administrators).	Catalog editors need additional editing access rights in the catalog page tree (see Controlling access to catalogs and categories). A built-in user group created when Episerver CMS is installed.
Everyone	Derived from Windows, this group provides “anonymous” visitors with read access to content. All unregistered visitors to a public website are anonymous, meaning that they cannot be identified by the system.	A built-in user group created when Episerver CMS is installed.

Episerver Commerce groups for controlling access to user interface areas

Group	Provides access to
CommerceAdmins	All parts of Commerce Manager *except* Administration and the CMS admin view.
CatalogManagers	The **Catalog** user interface.
MarketingManagers	The **Marketing** user interface.
CommerceSettingsAdmins	The Commerce **Settings** tab, which allows editing of dictionary property values for Commerce content.

Episerver Commerce groups for controlling access to order management functions

Group	Provides access to
Order Supervisor	All order management procedures.
Order Managers	• Creating returns and exchanges • Viewing and editing orders • Sending notifications • Processing payments and split shipments
Receiving Manager	• Viewing shipments • Receiving returns
Shipping Manager	Viewing, packing, and completing shipments.

To determine more granular access rights to Commerce Manager functions for any standard group, custom group, or individual users, use the permissions for functions screen. See Customizing group access to functions.

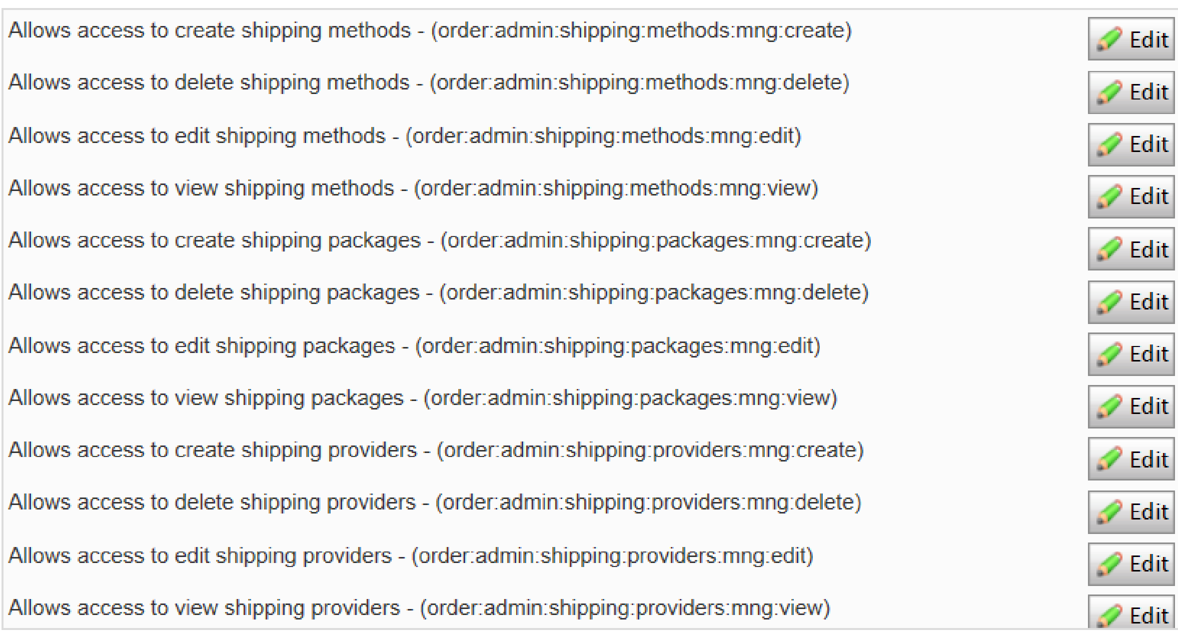
Customizing group access to functions

You can customize which groups and users can perform Episerver Commerce functions beyond the levels listed in Groups and access rights. For example, you can grant the Receiving Manager group the ability to allow refund credits, even though that group cannot access that function by default. Or, you can remove from the Order Managers group the ability to add, edit, delete payments for orders.

> Note: Permissions for Functions are only applied in Commerce Manager, not in the Catalog user interface.

To do this

1. Go to **CMS admin** view > **Config** > **Security** > **Permissions for Functions**.
2. Select a function.
3. Assign or remove users or groups to/from that function.



See Permission for functions in the CMS Administrator User Guide.

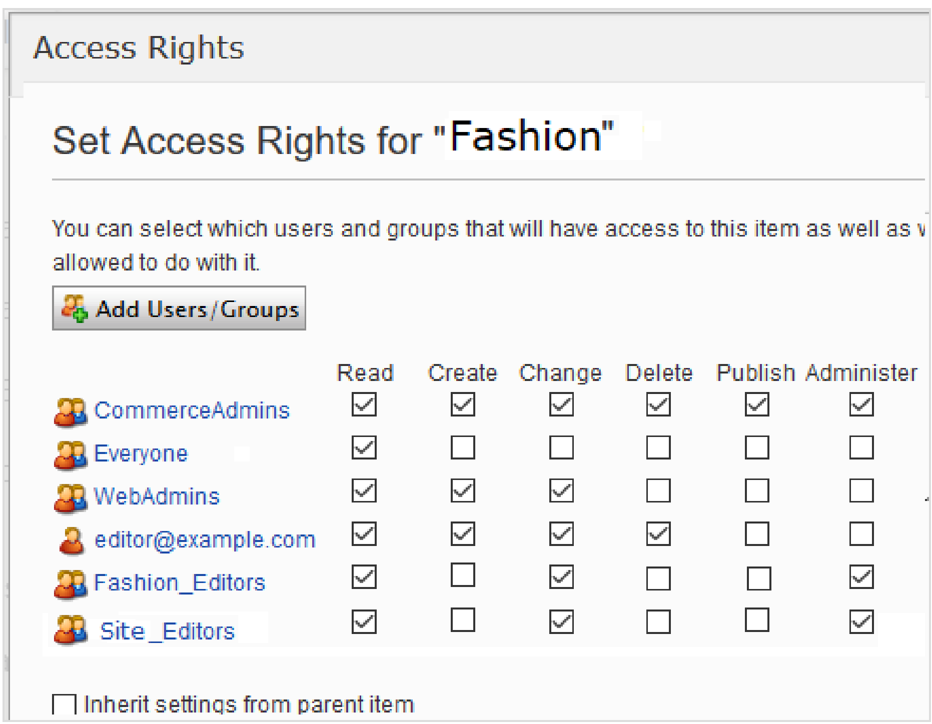
Controlling access to catalogs and categories

Members of user groups have default access rights to catalog content, as described in Groups and access rights. You can override these settings, and grant predefined groups and users access to individual catalogs and categories. You can also create custom groups then assign to their members the ability to perform various tasks on products in any category or catalog.

For example, a **Site_Editors** group has change permission for the entire catalog structure, while members of the **Fashion_Editors** group only have change permission for the Fashion catalog, and **Automotive_Editors** group members only have change permission for the Automotive catalog.

Note that you *cannot* set access rights for individual products. Products inherit permissions from their direct parents (but not "linked" parents).

> Note: Access rights set in the Catalog do not carry over to Commerce Manager (CM). So, users with CM access can still edit entries there despite the catalog settings. You can restrict access to CM through Customizing group access to functions. However, most users who edit catalogs cannot access CM.



To control access to catalogs or categories, follow these steps.

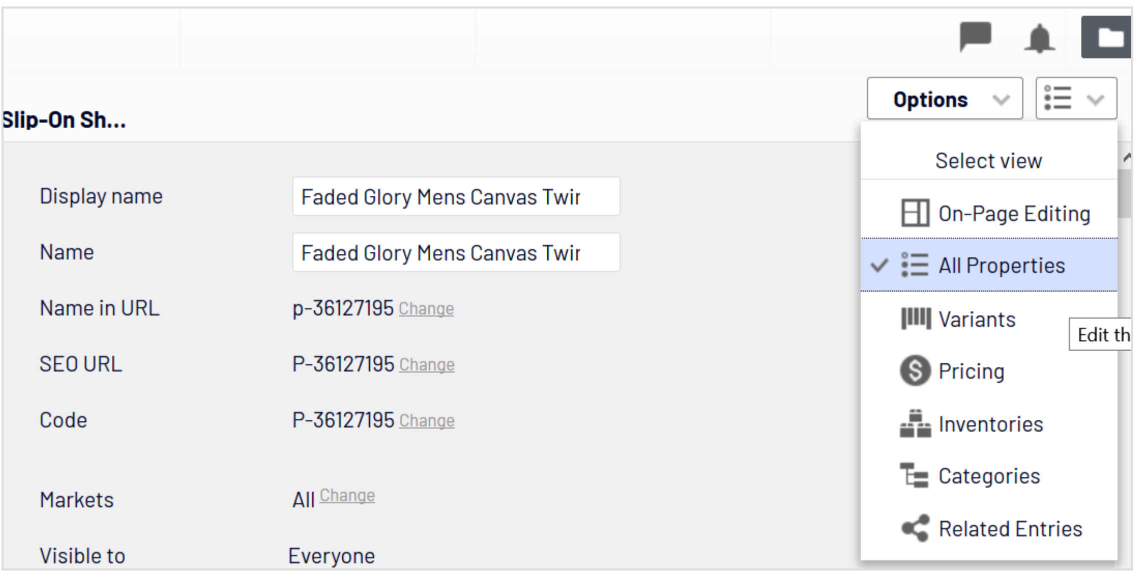
Prerequisite: To work with catalog and categories, users must belong to the WebEditors and CatalogManagers user groups.

Part 1: Create custom groups

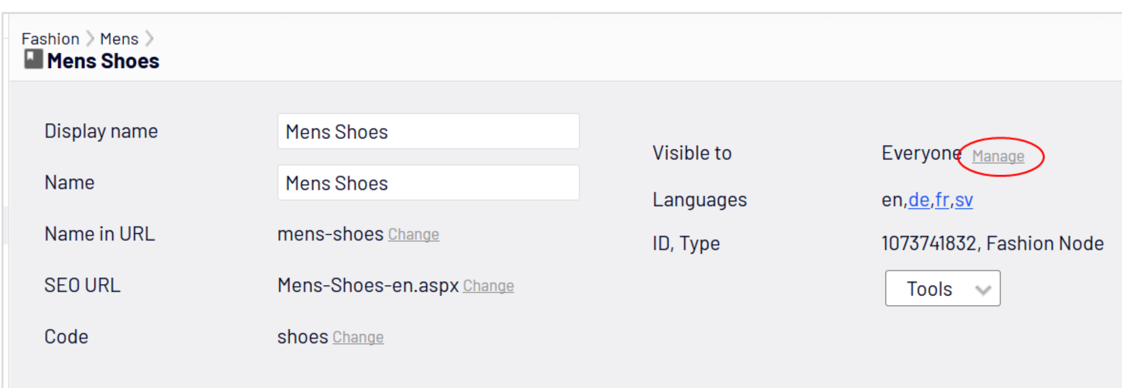
Set up user groups that will have edit access to specific catalogs. See Managing users and user groups in the CMS Administrator User Guide.

Part 2: Assign groups to catalogs/categories

1. In the Catalog, navigate to the catalog or category for which you want to grant access to groups or users.
2. Go to **All properties** view.



3. Next to **Visible to**, click **Manage**. The Set Access Rights screen appears.



4. Uncheck **Inherit settings from parent item**.
5. Assign groups and users to appropriate actions for the catalog or category. If you do not see a group or user for which you want to assign access rights, click **Add Users/Groups**.

   To learn about the access levels, see Access rights in the CMS Administrator User Guide.

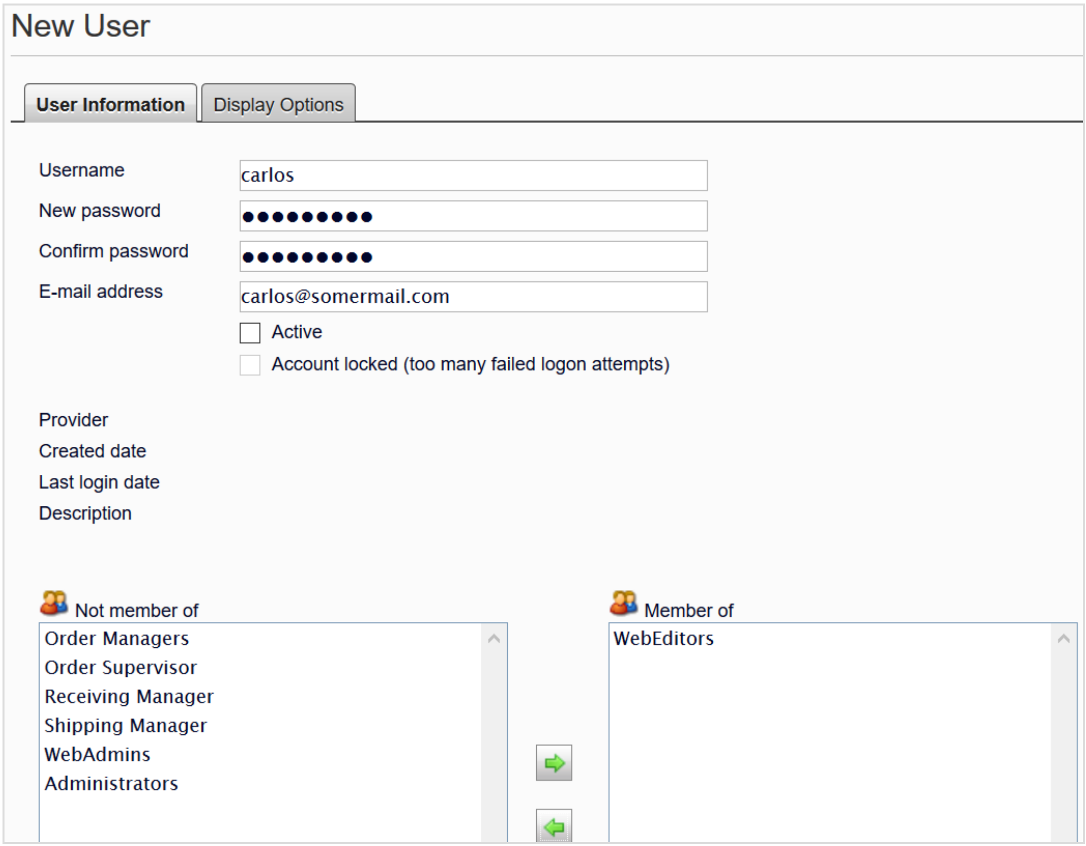
The image below illustrates an editor's ability to edit the **Mens Shoe** category but no other categories under the parent.

Example: Creating a user with access rights in Episerver CMS and Episerver Commerce

In this example, you create a user who enriches product information and landing pages in Episerver CMS, catalog content in Episerver Commerce, and all parts of Commerce Manager.

1. In the CMS admin view, go to **Access Rights** > **Create User**.
2. Enter the user information, select **Active**, and add the user to the desired groups. In this example:
   - *WebEditors* provides access to editing views
   - *CommerceAdmins* provides access to Commerce Manager.
   - *Site_Editors* structure group provides access the entire catalog structure (as illus-

trated in the above image).



3. Click **Save**.
4. Log in as the user to verify that proper access rights are applied.

Access rights for the Episerver platform

See Managing permissions for information about managing access rights for other parts of the Episerver platform.

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Episerver Customer-Centric Digital Experience Platform (DXP)™

The Episerver Customer-Centric Digital Experience Platform (DXP)™ unifies digital content, commerce and marketing in one platform, including omnichannel solutions for intelligent campaigns. The platform uses artificial intelligence and behavioral analytics to deliver personalized experiences everywhere. With our secure, reliable platform you can quickly increase engagement, revenue and productivity, while getting the fastest time to value.

About Episerver

At Episerver, we believe digital transformation is a journey. We have been guiding customers for more than 20 years in providing standout digital experiences. Today our network of 880 partners, in 30 countries, supports 8,000 customers and over 30,000 websites. Founded in 1994, Episerver has offices in the US, UK, Sweden, Australia, Germany, Denmark, Finland, Norway, Poland, the Netherlands, Spain, South Africa, Singapore, Vietnam and the UAE.

For more information, visit **episerver.com**.