



Episerver Commerce

User Guide





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Episerver Commerce User Guide

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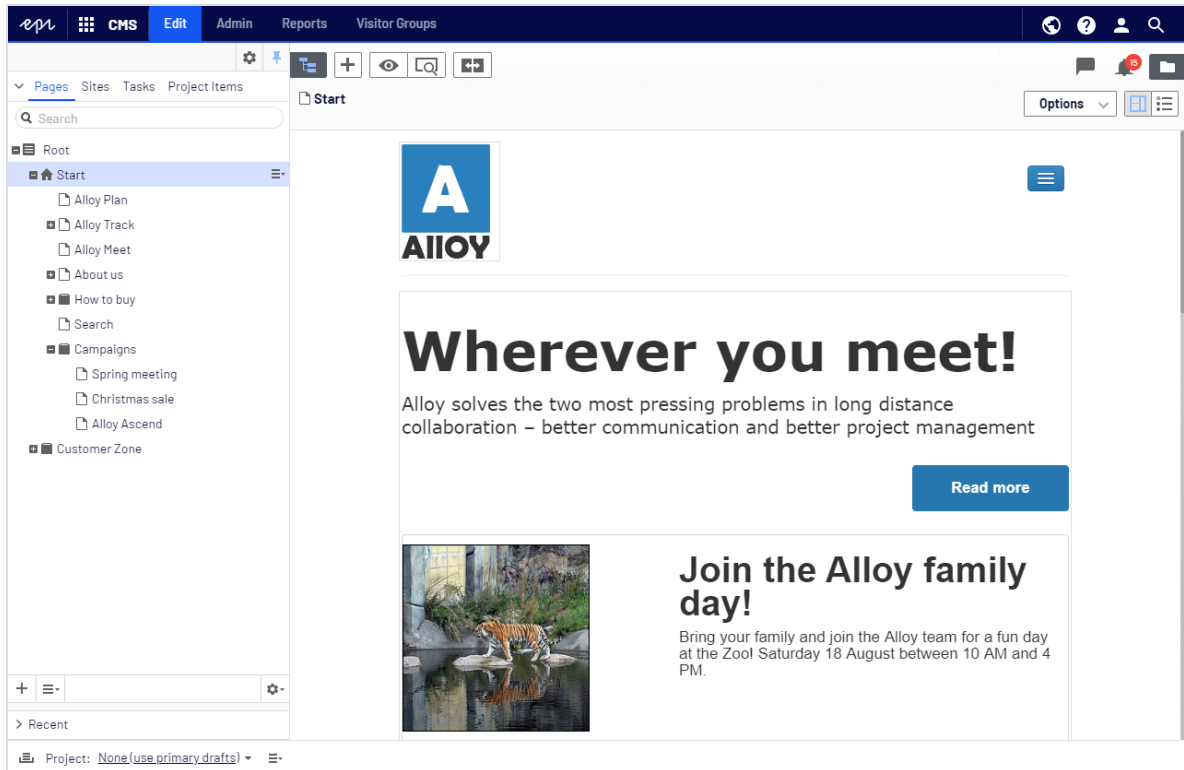
Introduction

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

You access the online help from within the Optimizely platform or from [Optimizely 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 Optimizely Commerce, which you can find on [Optimizely World](#). Developer guides and technical documentation also are found on [Optimizely 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 Optimizely platform.



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



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



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



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



Optimizely 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 Optimizely 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 Optimizely 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 Optimizely user guide uses images and screenshots to visually guide you through the features of the Optimizely 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.

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What's new?

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

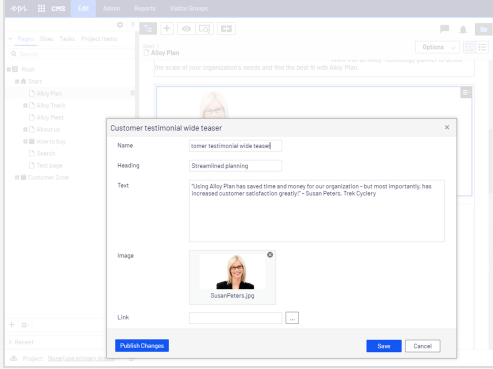
This release of the Optimizely User Guide describes features available in Optimizely as of 2021-06-24. See release notes (below) for update history. See Archived documentation in the online version of the user guide for previously released user guides and for older release notes.

Release notes 2021

Released	Area	Features and updates
2021-06-24	Campaign	If you use the coupon system, you can now optionally create QR codes. You can also use field functions to generate QR codes that refer to specific recipient list fields.
2021-06-17	Campaign	See Deliverability basics for information about the BIMl email authentication standard.
2021-06-14	B2B Commerce	Spire roles documented.
2021-06-09	B2B Commerce	Adyen payment gateway plug-in documented.
2021-05-27	Marketing automation connectors	Fields were added to the Acoustic (Silverpop) Connector setting screen to include database lists. (update 368)

Released	Area	Features and updates
2021-05-13	Campaign	In Deep Analytics, you can use separate groupings for the name and ID of mailings, recipient lists, and clients. See Groupings. (update 366)
2021-04-29	Triggered Messages	A new feature was added to the Targeted Discount daily trigger to enable the trigger to fire if products were added to a basket but not purchased within the last 30 days.
2021-04-22	Campaign	You can now create webhooks for the <i>bounce</i> event. (update 364) See Deliverability basics for information about list bombing and learn how to recognize these cyberattacks and protect yourself.
2021-04-15	Campaign	See Deliverability basics for a glossary of the most important terms related to deliverability.
2021-03-31	Campaign	The beta phase of the webhook feature has been expired. You can now create webhooks for the <i>sent</i> event and optionally submit the Basic HTTP Authentication header. You can also verify and update webhooks via REST API. See Webhooks. (update 362) You can now display background images in grouping paragraphs and sidebars in the mobile newsletter version. You can also automatically stretch or crop the image to fill the entire paragraph area. See Grouping paragraph. (update 362) The beta phase of the A/B tests for transactional mails feature has been expired. This feature is now available for all users on request.
2021-03-25	Visitor Intelligence	Visitor Intelligence now comes with a set of

Released	Area	Features and updates
		built-in filter definitions. It is also possible to add time and occurrence filters to segments to further limit matching profiles. See Creating a segment based on filter definition . (update 360)
2021-03-25	Campaign	<p>In the Optimizely Campaign start menu under Scheduled jobs, you can find an overview of the scheduled jobs configured in your client. (update 360)</p> <p>If you use the coupon system, you can generate bar codes based on the values of your recipient list fields via field functions.</p>
2021-02-18	Campaign	In the Marketing Automation's Advanced node, you can specify which recipients are passing through the Marketing Automation campaign at which time. You can now define even more precisely when Optimizely Campaign should check the criteria. For example, if you set the interval to <i>Every 2 months, each 1st from 14:00</i> , Optimizely Campaign checks the criteria on the first day of every second month at 14:00. (update 355)
2021-02-04	Campaign	If you use the recipient list management, you can now change the field name of recipient list fields. See Editing recipient list fields . (update 352)
2021-01-21	B2B Commerce	The end user documentation for B2B Commerce and Optimizely PIM has now been integrated in this user guide. See sections Optimizely B2B Commerce and Optimizely PIM .
2021-01-21	CMS	Edit and publish blocks in a quick edit view, which lets you edit relevant block properties without leaving the current context. (update 350)

Released	Area	Features and updates
		
2021-01-21	Commerce	Customer service representatives can create <i>notes</i> associated with carts, orders, and subscriptions (update 349).
2021-01-21	Personalization	<ul style="list-style-type: none"> • Create reusable email templates • Export CSV data in localized format for the selected language • Users (with authorization) can change the currency selection
2021-01-21	Campaign	You can now run A/B tests for transactional mails to send different variants of a transactional mail and check which variant performs better.

Archived documentation

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

Getting started

This topic describes how to log in to an Optimizely 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.

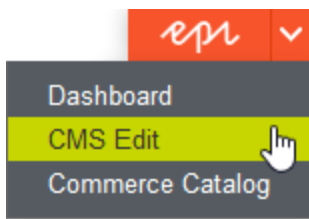
Logging in

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 Optimizely login dialog box, and click **Log In**.

Accessing features

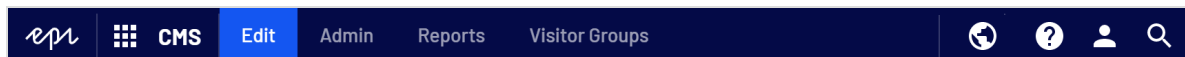
What you are allowed to do after logging in depends on your implementation and your access rights, since these control the options you see. When logged in, the Optimizely quick access menu appears in the upper right corner.

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.

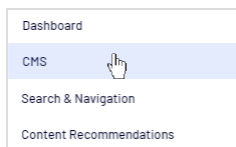


Navigation

Navigation within CMS and to other parts of the Optimizely 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 Optimizely.

Next steps

- The User interface and Roles and tasks topics describe the different parts of the user interface and the Optimizely 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 Optimizely.
- If you have Optimizely Commerce installed, see the Commerce User Guide to work with e-commerce tasks.
- If you have Optimizely Search & Navigation installed, see the Optimizely Search & Navigation User Guide to work with search optimization.

Roles and tasks

Optimizely is designed to interact with website visitors, and for collaboration among users of the platform. This topic 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 Optimizely.

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.

User

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

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 reports for 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.

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.

Customer Service Representative

A *customer service representative* (CSR) works in the Optimizely Commerce order management user interface. Tasks may include updating or creating orders, updating customer information, and managing subscriptions and payments. The manual order work is often initiated by customers through a support function.

Administrator

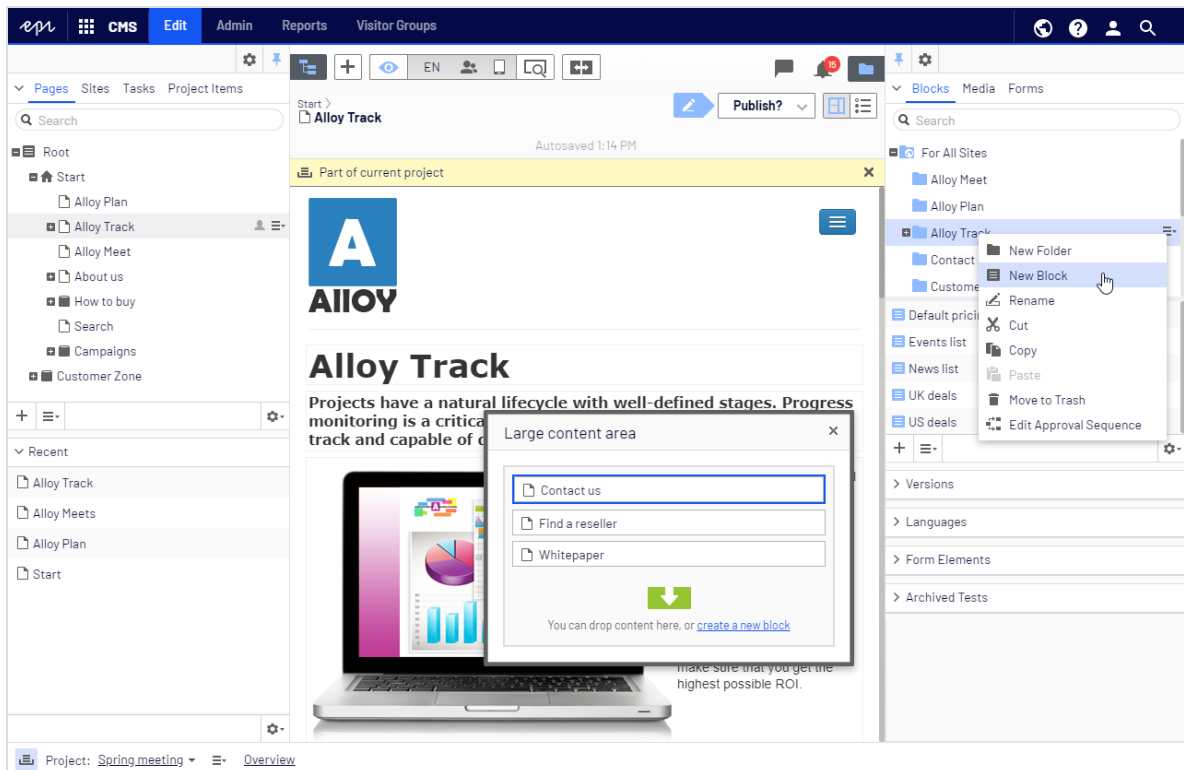
An *administrator* configures system settings from the administration user interface, including search, languages, personalization, and user access. Administrators usually have extended access rights compared to other user groups, and can access all parts of the Optimizely platform. They may also have 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

The **toolbar** and the **panes** in the Optimizely 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.

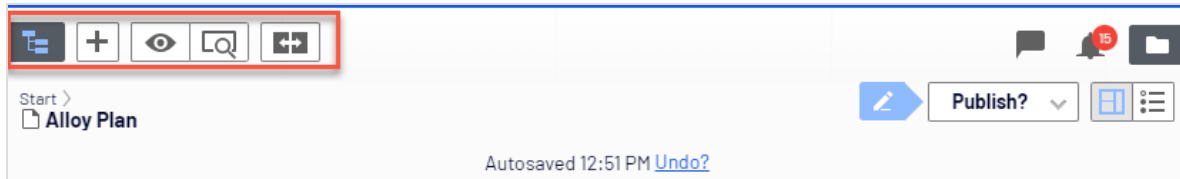


Note: The Optimizely user interface is flexible allowing developers to plug-in customized features when implementing websites. This description refers to Optimizely CMS without further customizations.

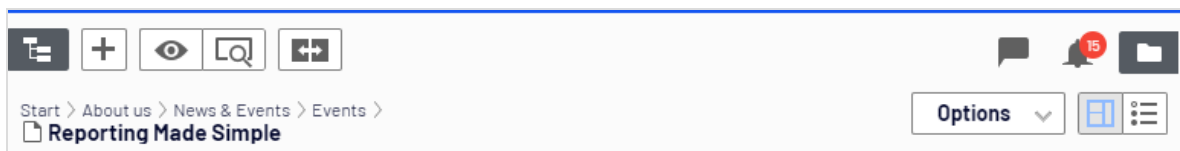
By clicking the product switcher  in the top menu, you can access other products of the Optimizely platform. You can also access other parts of Optimizely CMS, the live view of your site(s), this user guide, your user settings and a global search from the top menu.



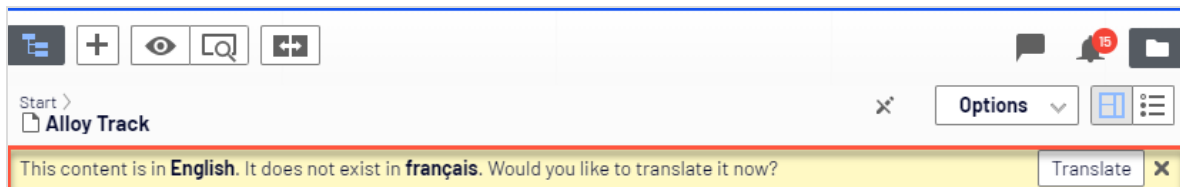
The toolbar contains features like preview and view options, and lets you add items such as pages or blocks.



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.



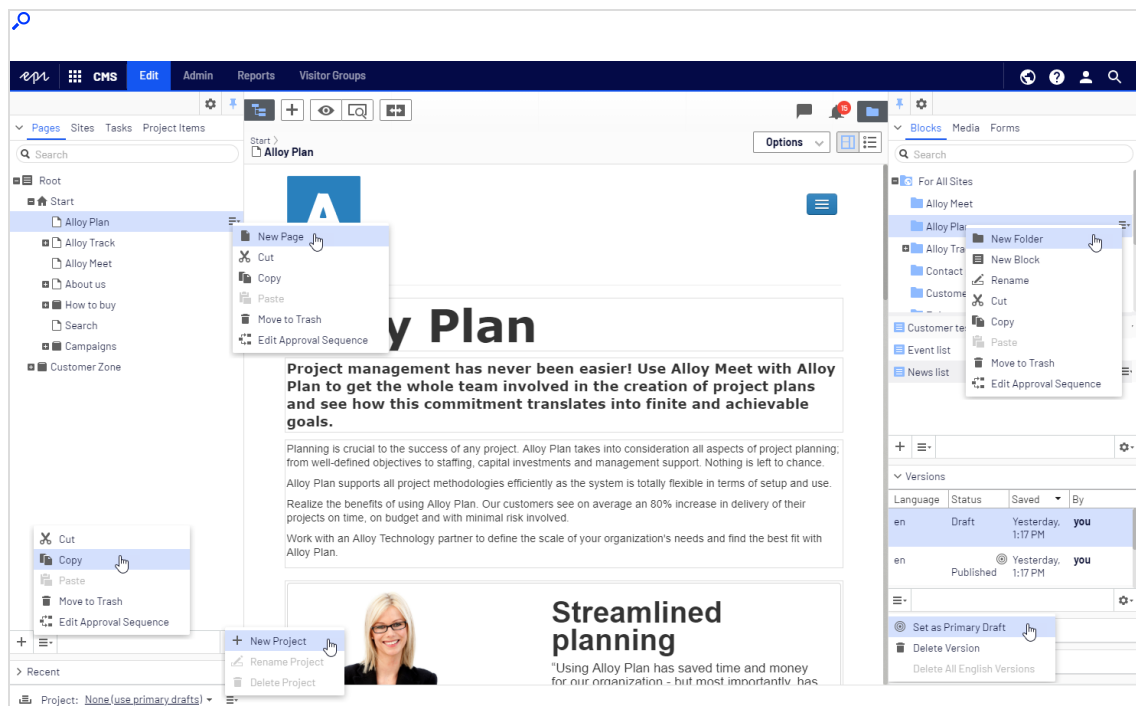
A notification toolbar may be displayed below the toolbar showing confirmation and error messages and such.



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.



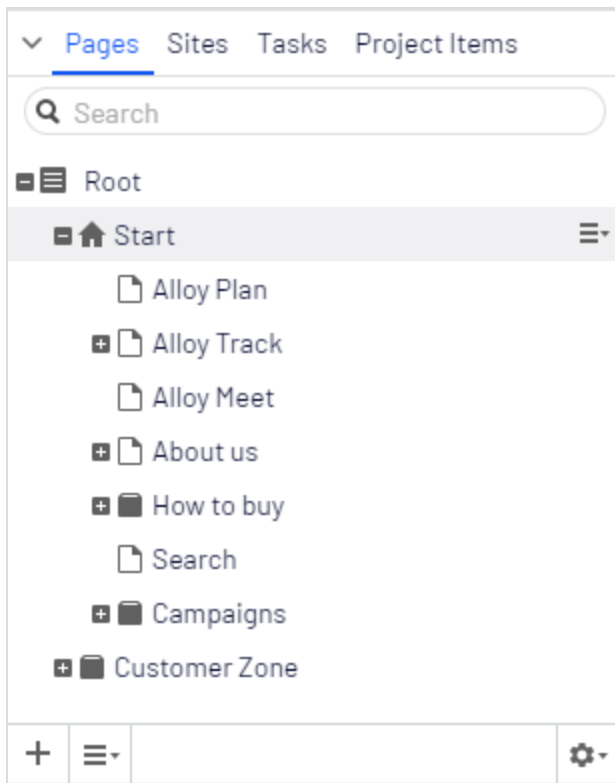
Pane pin is used for expanding and locking the panes in an open position.



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.

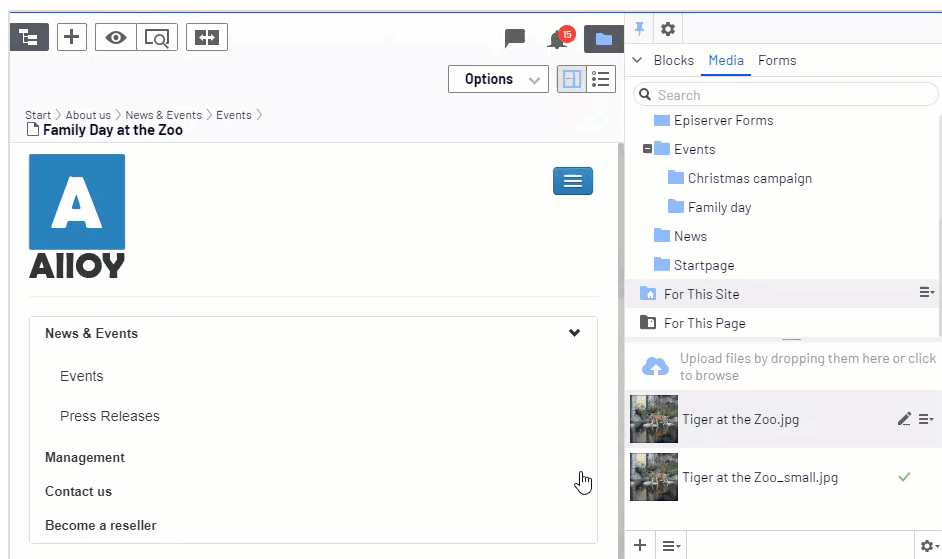


Right-hand assets pane

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.

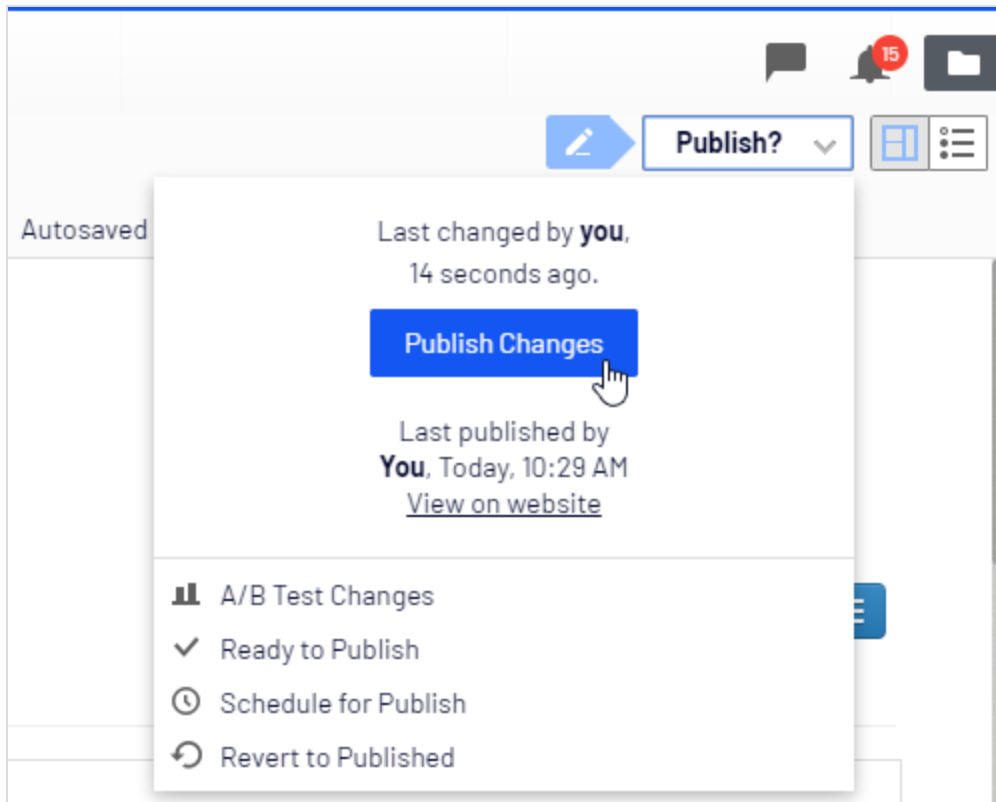
Note: If you copy and paste multiple folders on different levels, they will be on the same level when pasted.





If you have Optimizely Commerce or Optimizely 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 Optimizely Commerce, there are two editing views, **On-Page Editing** and **All Properties**, with buttons to switch between them.

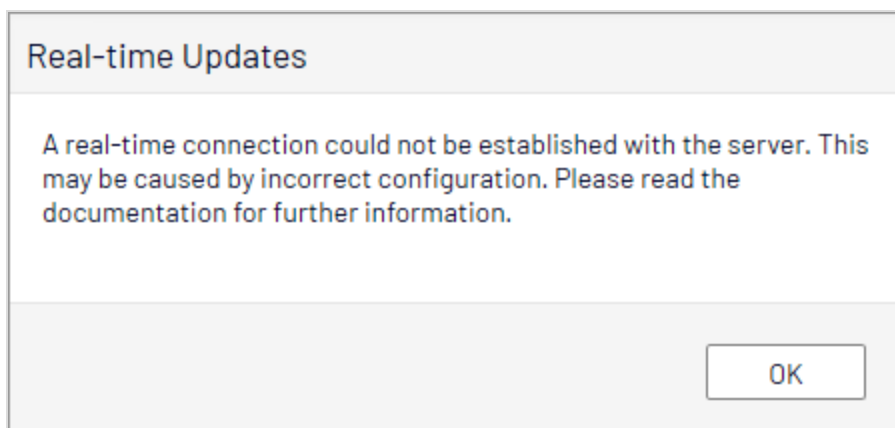
-  On-Page Editing view provides quick access to direct editing of a selection of content properties.
-  All Properties view provides access to all available properties including more advanced ones such as access rights and language settings.

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

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



The *Real-time Updates* dialog box can have two main reasons. It appears because Optimizely 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 Optimizely.

Whatever the reason, Optimizely 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 Optimizely 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, Optimizely 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 Optimizely 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 Optimizely 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 Optimizely 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.

My Settings

User Information Display Options

Language Settings

Personal Language Use system language

Views

Limit touch support

Reset all views to system default. This will remove any customizations like added, deleted or moved gadgets and restore the panels to system default.

Reset Views

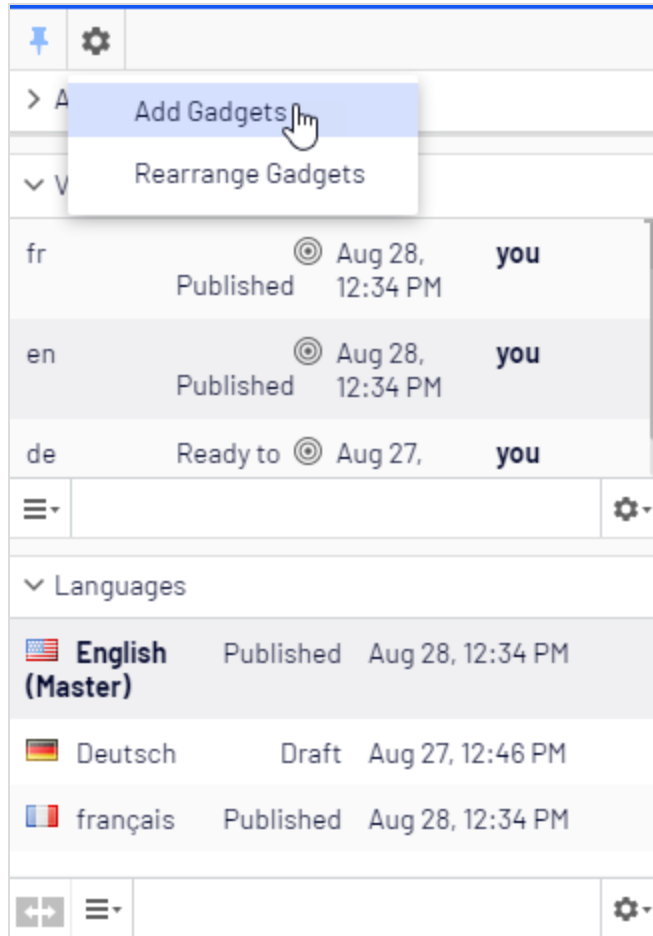
Save

- **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 Optimizely or Optimizely partners, to extend the capabilities of Optimizely. A developer (or someone with administrative access rights) installs most add-ons. See [Optimizely 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.



Shopping flow

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

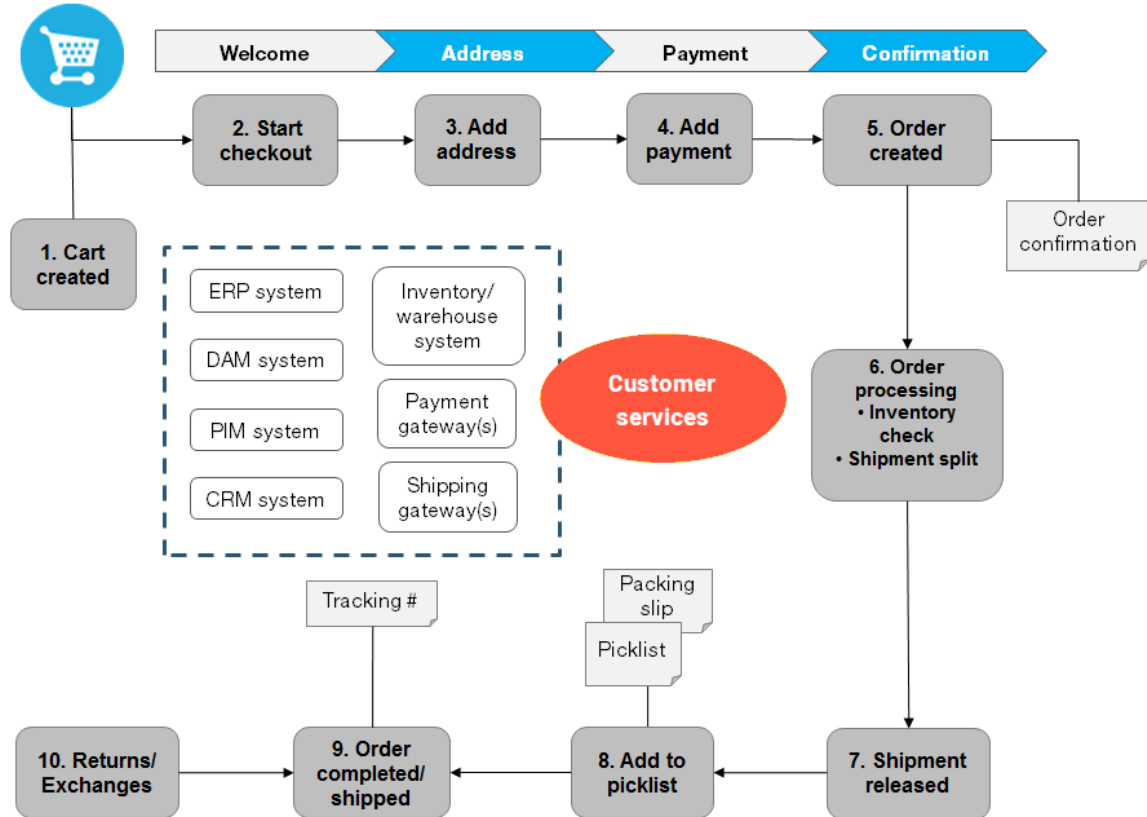
- **Business-to-Consumer (B2C):** designed for selling goods and services to consumers.
- **Business-to-Business (B2B):** used to build strategic relationships with other businesses, and to ease the supply and procurement processes that characterize trade among those organizations.

Sites can have multiple roles, and a single site can provide several functions. Optimizely 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, Optimizely 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

Optimizely 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 Optimizely Commerce.

You can integrate the following business systems with Optimizely 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 Optimizely Commerce solution with additional modules from Optimizely and third-party providers. Extension modules are available from the Optimizely 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 Optimizely 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 Optimizely 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 Optimizely 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.

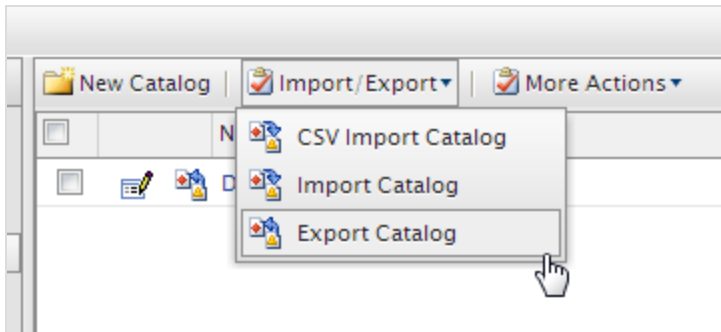
Depending on the import or export setup, you may need to manually [edit the information](#) for imported products (such as adding images, documents, and associations) and their variations to complete the task.

Importing or exporting catalog data via a .zip file

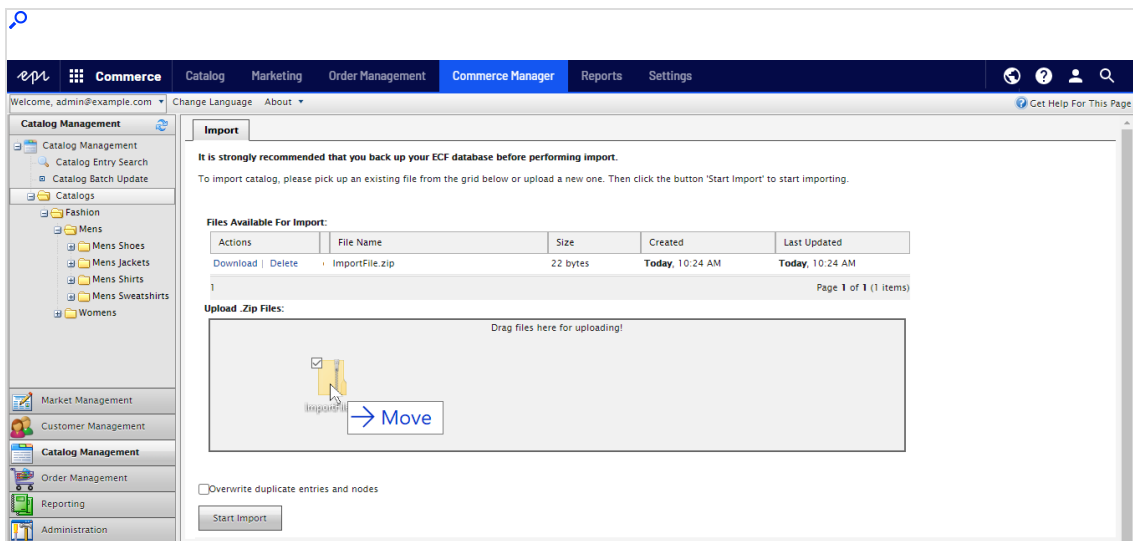
The **Import/Export** feature imports .zip files exported from Commerce Manager. It is a quick way to import catalogs from other websites and start with a base for expanding a catalog.

Importing a catalog

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



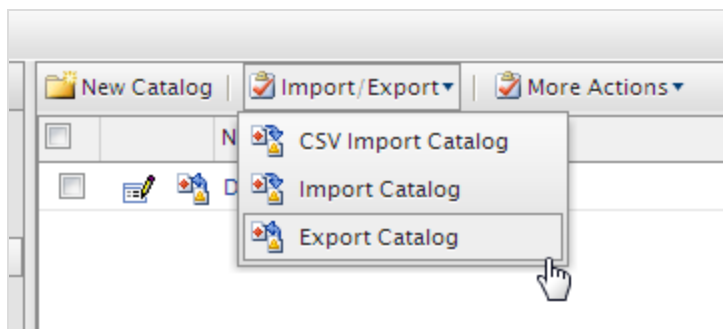
3. Drag and drop the catalog file from the source location. The uploaded files appear in the import list.
4. Click **Start Import**. A progress window shows the status.
5. When the import is complete, close the progress window.



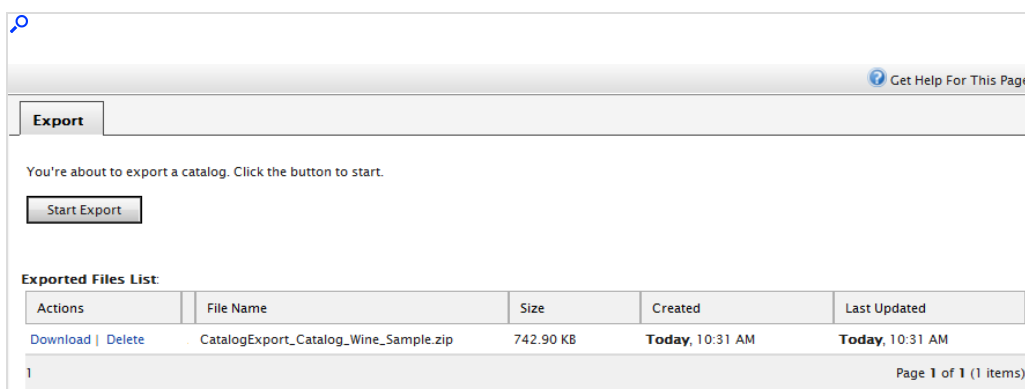
Exporting a catalog

- 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
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/	Information for the Inventory tab.	CSV file type 5 — Pri-

Mapping file type	Used to specify	Example
Inventory		cing/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	TestBrand Potty Pants	
5										

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\BabyCatalogImages\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
					Track Inventory								Reorder			Allow	Allow	Inventory			
1	Action	Entry Code	Price	Tax Category	(True/False)	Warehouse	Weight	Package	Min Quantity	Max Quantity	In Stock	Reserved	Min. Qty	Preorder Qty	Backorder Qty	Backorder	Preorder	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 Optimizely Commerce catalog data to Optimizely Campaign

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

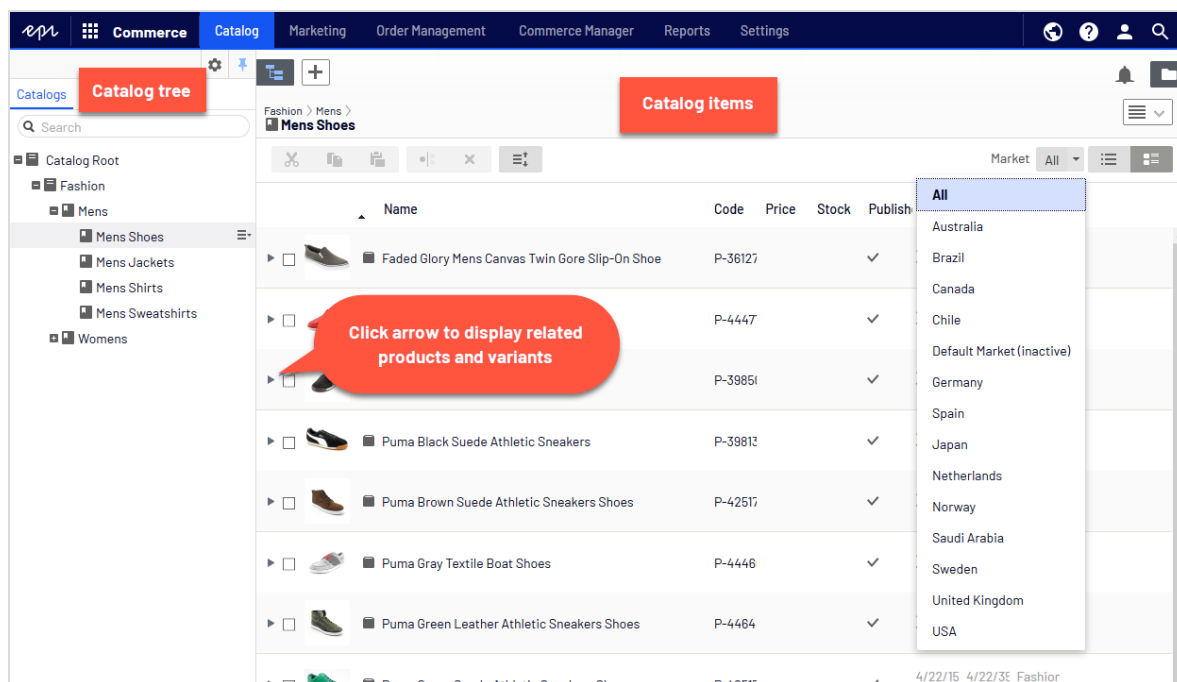
In Optimizely Campaign, the Optimizely Commerce product data is used in a Content Interface Paragraph. The data can be rendered dynamically based on personal recommendations, or as a static product recommendation rendered for all recipients who get the paragraph in their message. See also: Content interface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

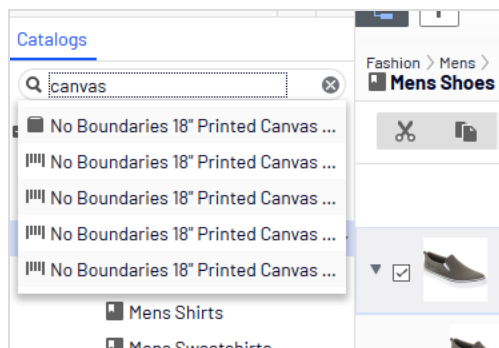
Icon	Meaning
	package
	product
	variant

Select a product or variant to view and edit its content. See also: [Editing and publishing catalog entries](#).

Fashion > Mens > Mens Shoes						
Name	Code	Price	Stock	Published	Available from	
<input checked="" type="checkbox"/>  Faded Glory Mens Canvas Twin Gore Slip-On Shoe	P-36127195			✓	4/22/15, 7:47 AM	
<input type="checkbox"/>   Faded Glory Mens Canvas Twin Gore Slip-On Shoe	SKU-36127195	\$19.50	1997 	✓	4/22/15, 7:47 AM	
<input type="checkbox"/>   Faded Glory Mens Canvas Twin Gore Slip-On Shoe	SKU-36127195	\$19.50	1356 	✓	4/22/15, 7:47 AM	
<input type="checkbox"/>   Faded Glory Mens Canvas Twin Gore Slip-On Shoe	SKU-36127195	\$19.50	1914 	✓	4/22/15, 7:47 AM	
<input type="checkbox"/>   Faded Glory Mens Canvas Twin Gore Slip-On Shoe	SKU-3612720	\$19.50	2145 	✓	4/22/15, 7:47 AM	
<input type="checkbox"/>   Faded Glory Mens Canvas Twin Gore Slip-On Shoe	SKU-3612720	\$19.50	2373 	✓	4/22/15, 7:47 AM	
<input type="checkbox"/>   Faded Glory Mens Canvas Twin Gore Slip-On Shoe	SKU-3612720	\$19.50	1843 	✓	4/22/15, 7:47 AM	

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

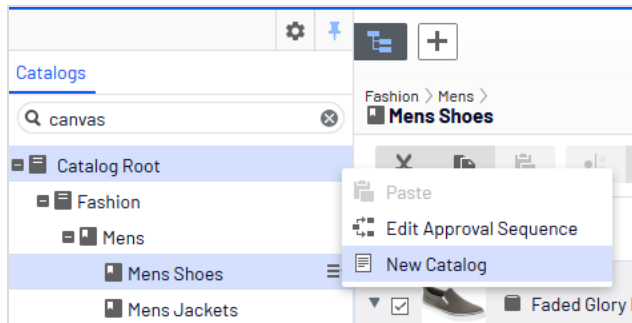
You can also access catalog entries from edit view through the **Catalogs** gadget in the assets pane. The gadget is useful when dragging-and-dropping catalog entries into content areas. See also: [Managing content](#).

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

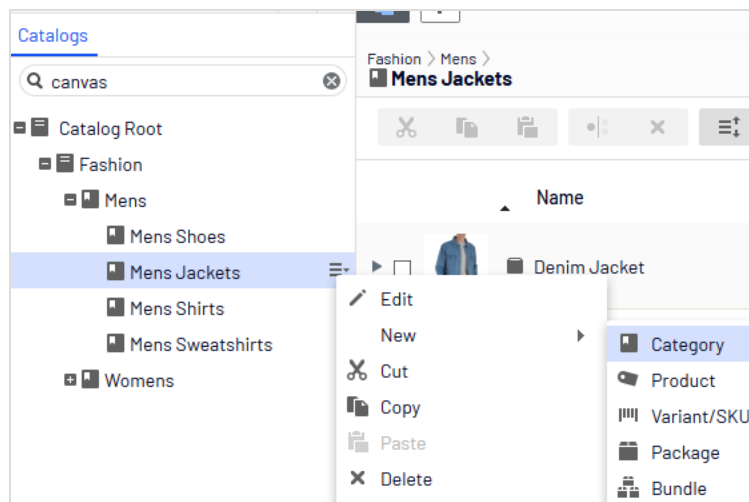
The Catalog interface in Optimizely Commerce enables you to work with catalog data. Marketers may want to create new products and variants, and merchandisers may want to enrich products as they are added to e-commerce channels. E-commerce solutions integrated with an external ERP system may have products with core data that only needs to be completed within Optimizely 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 go 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 Optimizely 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](#). Optimizely 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.

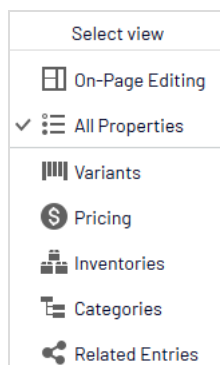
Properties for products and variants are similar, but pricing and inventory information is only defined for variants. See also: [Catalog entry properties](#)

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

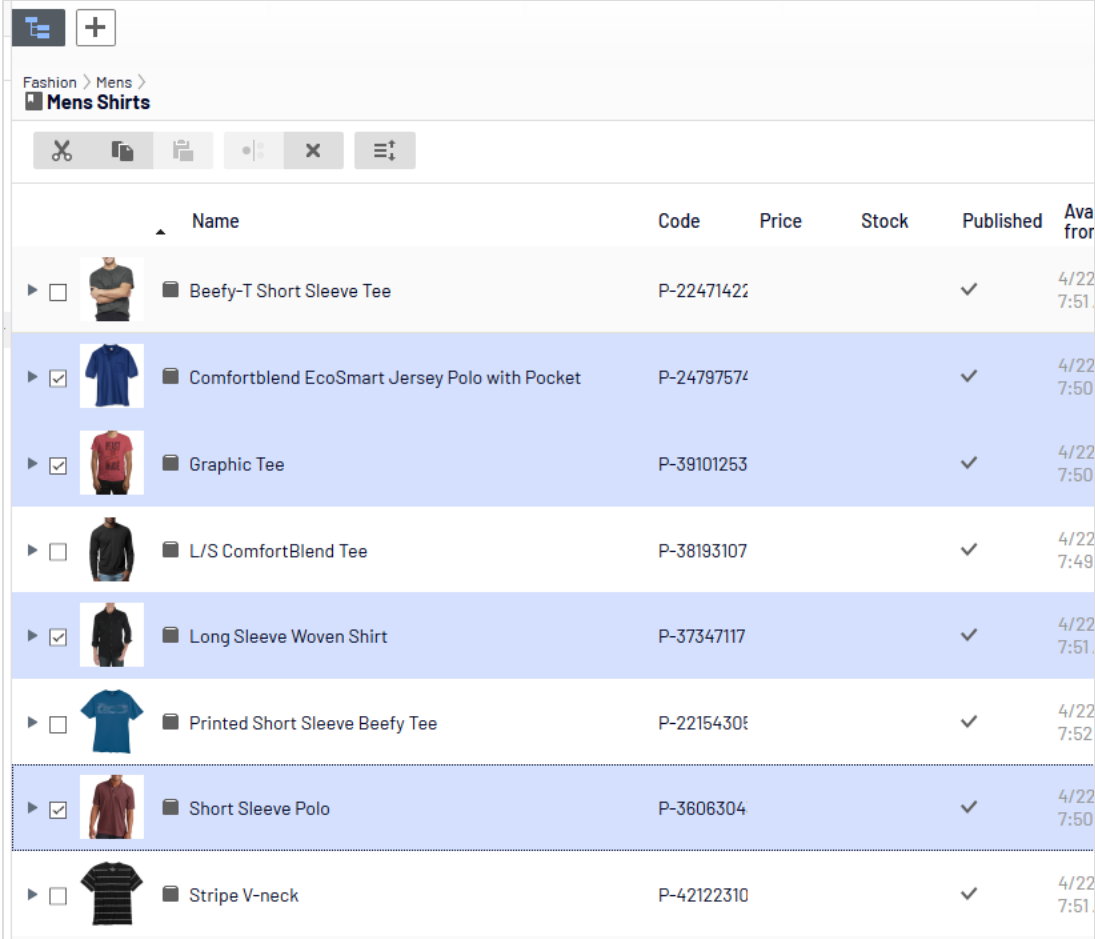
The catalog item list has on the top right a **Select view** with additional editing options. Use these to edit and access the **Pricing**, **Inventory**, **Categories**, or **Related Entries** views.



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**.



	Name	Code	Price	Stock	Published	Availability
<input type="checkbox"/>	Beefy-T Short Sleeve Tee	P-22471422			✓	4/22 7:51
<input checked="" type="checkbox"/>	Comfortblend EcoSmart Jersey Polo with Pocket	P-24797574			✓	4/22 7:50
<input checked="" type="checkbox"/>	Graphic Tee	P-39101253			✓	4/22 7:50
<input type="checkbox"/>	L/S ComfortBlend Tee	P-38193107			✓	4/22 7:49
<input checked="" type="checkbox"/>	Long Sleeve Woven Shirt	P-37347117			✓	4/22 7:51
<input type="checkbox"/>	Printed Short Sleeve Beefy Tee	P-22154308			✓	4/22 7:52
<input checked="" type="checkbox"/>	Short Sleeve Polo	P-3606304			✓	4/22 7:50
<input type="checkbox"/>	Stripe V-neck	P-42122310			✓	4/22 7:51

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.

The screenshot shows the 'Catalog Management' interface. On the left is a navigation tree with 'Catalog Management', 'Catalog Entry Search', 'Catalog Batch Update', 'Catalogs', 'Wine', and 'Templates'. The main area is divided into 'Main Adjustment' and 'Additional Filters'. Under 'Main Adjustment', 'Entry Type' is set to 'Variation / Sku', 'Meta Class' is 'Default Catalog Entry', and 'Field' is 'Entry : Name'. Under 'Additional Filters', 'Language' is 'English (United States)', 'Catalog / Category' is 'all catalogs', and 'Keyword(s)' is empty. Below these filters is a 'Save All' button and a table of search results.

Name	Entry : Name
Enoteca Wine Glass Small	Enoteca Wine Glass Small
Enoteca Wine Glass Large	Enoteca Wine Glass Large
Enoteca Waiters' Friend Double Lever Corkscrew Blue	Enoteca Waiters' Friend Double Lever Corkscrew Blue
Enoteca Waiters' Friend Double Lever Corkscrew Red	Enoteca Waiters' Friend Double Lever Corkscrew Red
Enoteca Waiters' Friend Double Lever Corkscrew Yellow	Enoteca Waiters' Friend Double Lever Corkscrew Yellow
Enoteca Decanter 1000ml	Enoteca Decanter 1000ml
Enoteca Decanter magnum	Enoteca Decanter magnum

- **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.

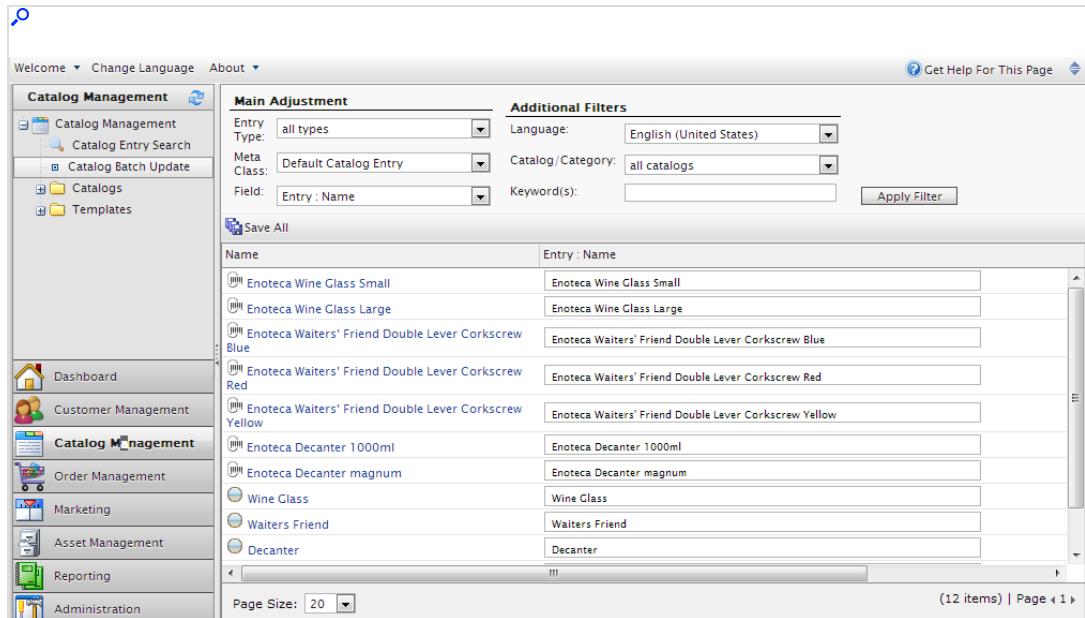
- **Additional Filters.**

- 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. Go 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**.

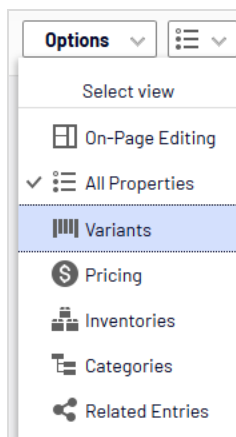
Notes about sorting

- 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 go 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.

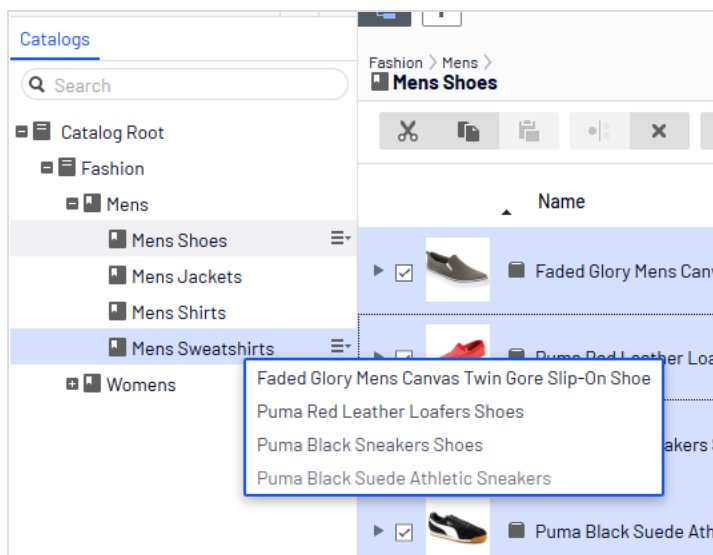
Duplicating catalog entries

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*, Optimizely 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*, Optimizely 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

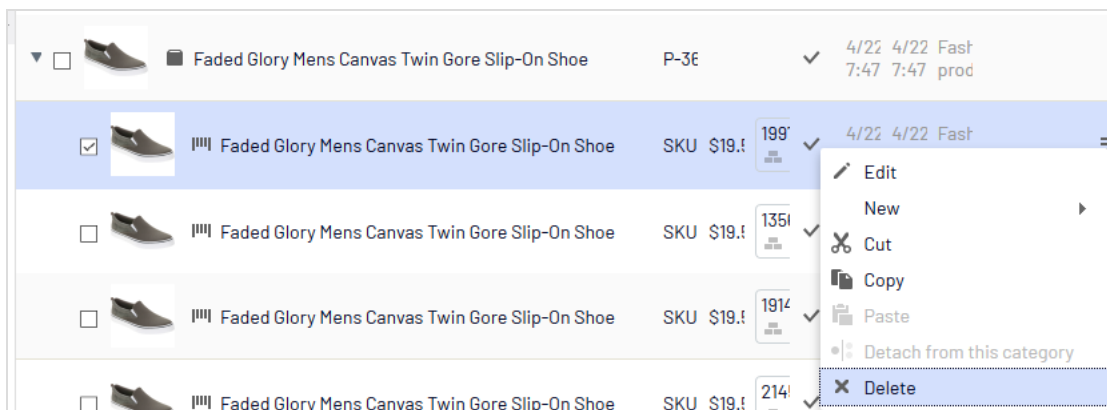
When deleting a product or a variant, the following happens depending on how the deleted entry is related to other catalog entries:

- 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

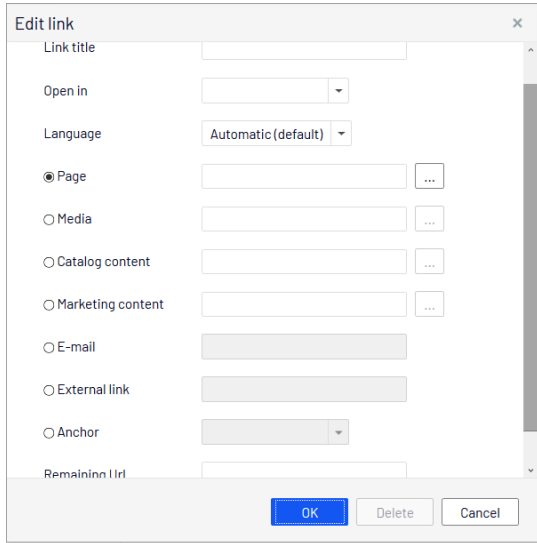
The **Content** tab properties depend on the product or variant.

Content	Belongs To	Variants	Assets	Related Entries	Settings
Brand	<input type="text" value="Aurielle-Carryland"/>				
Description	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Paragraph B <i>I</i>            </div> <p>Aurielle-Carryland Mariposa Tote Handbag:</p> <ul style="list-style-type: none"> • Product Material: Cotton canvas with leather-like PVC trim • Product Weight: 2 lbs. • Open entry with magnetic snap closures and middle top zip pocket • Striking butterfly pattern • Silver tone hardware details • Double handles with drop length of 9 inches </div>				
Long Description	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Paragraph B <i>I</i>            </div> </div>				

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

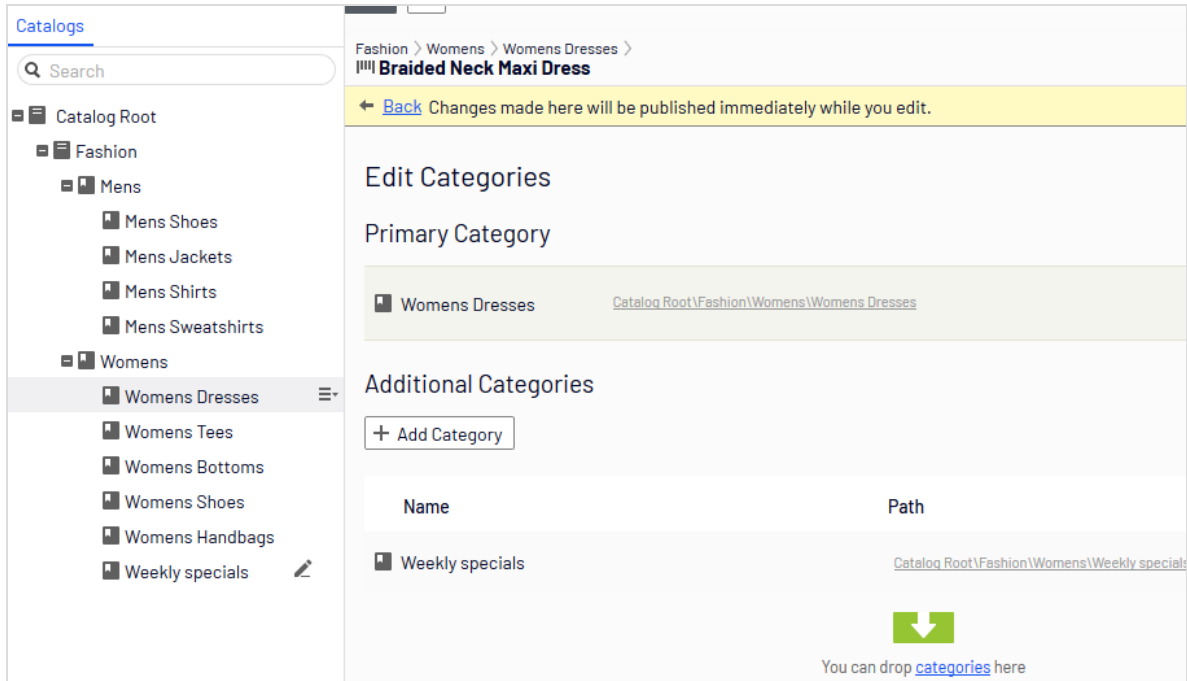
The Links dialog includes the following Commerce-specific properties:

- **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 Optimizely 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**.

Product Name	Code	Market	Price	Valid	Sale Type	Sale Code	Min. Quantity
Uress				4/22/35, 7:41 AM			
Braided Neck Maxi Dress	SKU-40707701	BRA	BRL39.50	4/22/15, 7:41 AM - 4/22/35, 7:41 AM	All Customers		0
Braided Neck Maxi Dress	SKU-40707701	CAN	CASH16.50	4/22/15, 7:41 AM - 4/22/35, 7:41 AM	All Customers		0
Braided Neck Maxi Dress	SKU-40707701	CHL	CLP7,941	4/22/15, 7:41 AM - 4/22/35, 7:41 AM	All Customers		0
Braided Neck Maxi Dress	SKU-40707701	DEU	€12.50	4/22/15, 7:41 AM - 4/22/35, 7:41 AM	All Customers		0
Braided Neck Maxi Dress	SKU-40707701	ESP	€12.50	4/22/15, 7:41 AM - 4/22/35, 7:41 AM	All Customers		0

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

Content	Belongs To	Pricing	<u>Inventory</u>	Assets	Related Entries	Settings
Min. quantity		<input type="text" value="1"/>				
Max. quantity		<input type="text" value="100"/>				
Weight		<input type="text" value="5"/>				
Shipping Package		<input type="text" value=""/>				
Shipping Dimensions						
Length		<input type="text" value="1"/>				
Height		<input type="text" value="2"/>				
Width		<input type="text" value="3"/>				
<input checked="" type="checkbox"/> Tracked						
Inventory locations ✕						
Location	Warehouse code	Quantity	Preorder Availability	Is Tracked		
Hanoi store	hanoistore	344	12/31/99, 7:00 PM	✓		
London store	londonstore	82	12/31/99, 7:00 PM	✓		
New York store	newyorkstore	76	12/31/99, 7:00 PM	✓		
Stockholm store	stockholmstore	418	12/31/99, 7:00 PM	✓		
Sydney store	sydneystore	430	12/31/99, 7:00 PM	✓		
Tokyo store	tokyostore	221	12/31/99, 7:00 PM	✓		
Edit inventories						

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.

The screenshot displays the 'Assets' tab for a product named 'Wrangler Men'S Denim Jacket'. The top section shows the product image and metadata fields: Display name (Wrangler Men'S Denim Jacket), Name (Wrangler Men'S Denim Jacket), Name in URL (sku-37378633), SEO URL (SKU-37378633), and Code (SKU-37378633). Below this is a navigation bar with tabs for Content, Belongs To, Pricing, Inventory, Assets (selected), Related Entries, and Settings. The 'Media for this entry' section features a circled '+ Add Media' button. A table below lists media items with columns for Name and Group. The first item, '0004032698322_Color_Black_SW_500X500', is assigned to the 'default' group. On the right, a media library shows a list of files with thumbnails and names like '0002931107776_Color_Black_SW_500X500'.

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 Optimizely Commerce merchandiser navigates to the television, clicks its **Related Entries** tabs, and adds suitable cables and wall mounts using the type **cross-sell**.

Content	Belongs To	Pricing	Inventory	Assets	<u>Related Entries</u>	Settings
Related Entries						
Other catalog entries that this entry is related to ✕						
Name	Code	Path	Type			
👕 Wrangler Men'S Denim Jacket	SKU-37378636	Catalog Root\Fashion\Mens\Mens Jackets\Wrangler Men'S Denim Jacket	Default			
👕 Printed Short Sleeve Beefy Tee	SKU-22154305	Catalog Root\Fashion\Mens\Mens Shirts\Printed Short Sleeve Beefy Tee	Default			
← Edit related entries						

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 cat-](#)

egories.

- **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, go 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.

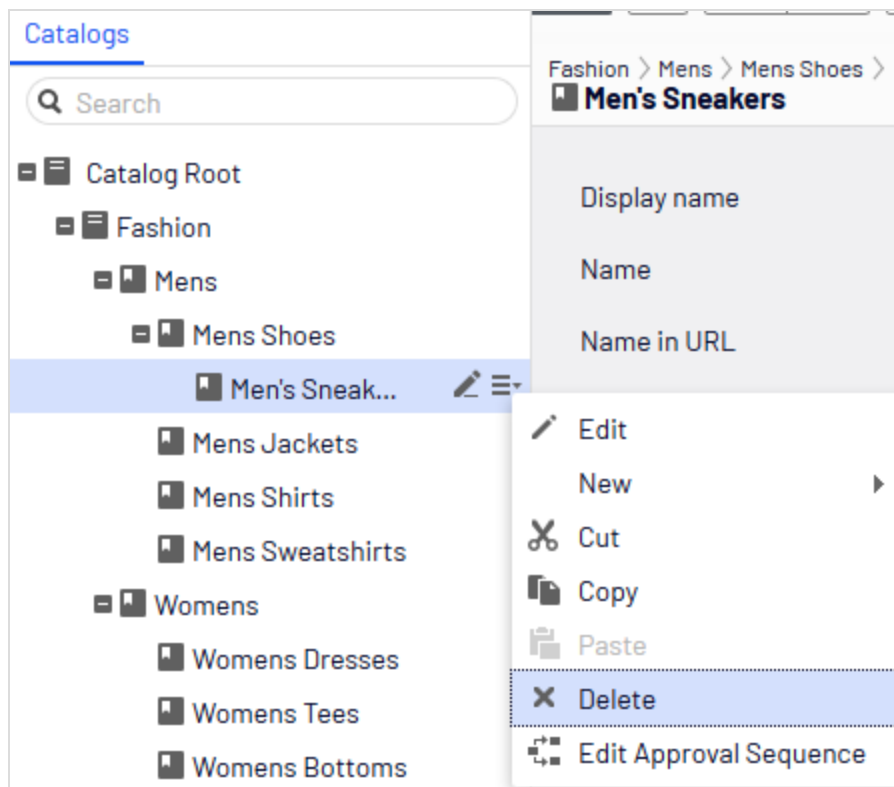
Deleting a category

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.

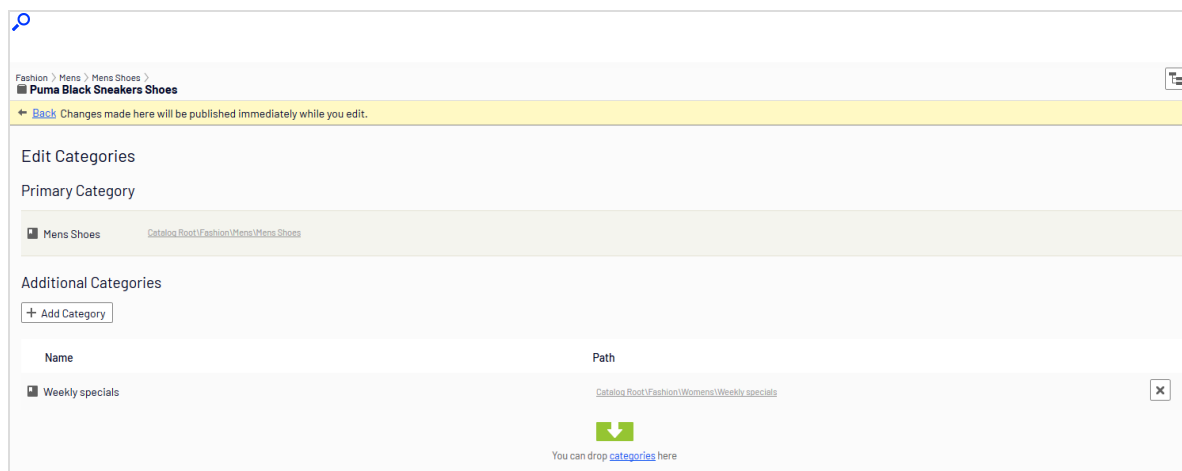
Warning: After deleting a catalog entry, you cannot recover it.
If you delete a category with many subitems, the deletion may take a while.

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

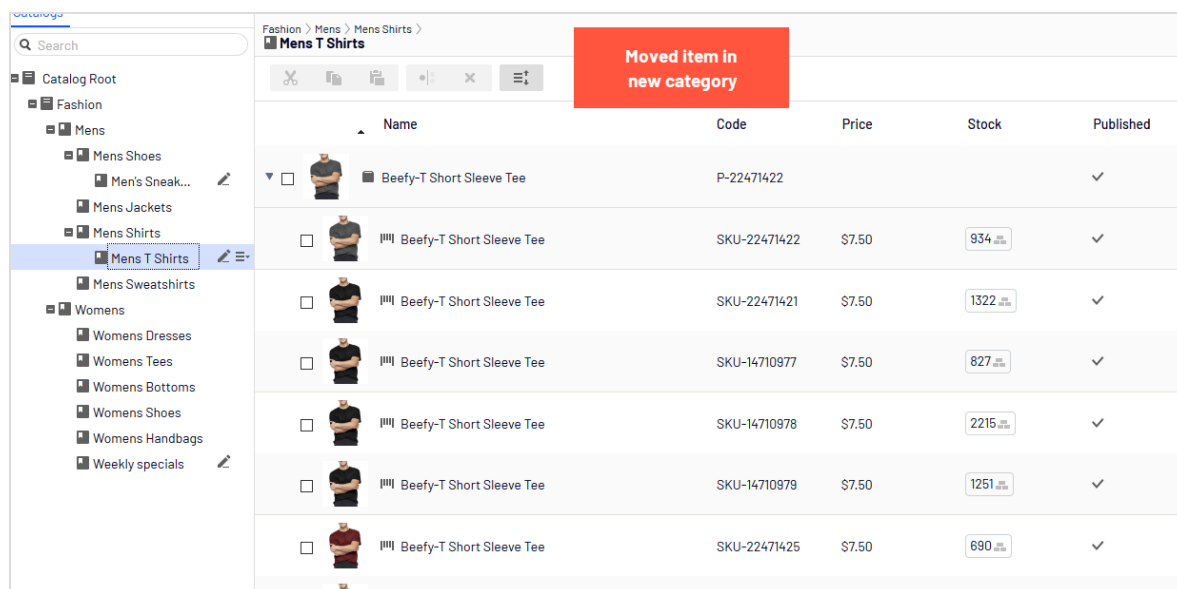
1. Select the catalog entry.
2. Select **Cut**.
3. Move to the new category.
4. Select **Paste**.

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**.




Name	Code	Price	Stock	Published
Beefy-T Short Sleeve Tee	P-22471422			✓
Beefy-T Short Sleeve Tee	SKU-22471422	\$7.50	934	✓
Beefy-T Short Sleeve Tee	SKU-22471421	\$7.50	1322	✓
Beefy-T Short Sleeve Tee	SKU-14710977	\$7.50	827	✓
Beefy-T Short Sleeve Tee	SKU-14710978	\$7.50	2215	✓
Beefy-T Short Sleeve Tee	SKU-14710979	\$7.50	1251	✓
Beefy-T Short Sleeve Tee	SKU-22471425	\$7.50	690	✓

The screenshot shows the product management interface for 'Beefy-T Short Sleeve Tee'. On the left is a navigation tree with categories like 'Fashion', 'Mens', 'Mens Shoes', 'Mens T Shirts', etc. The main area displays product details: 'Display name' and 'Name' are 'Beefy-T Short Sleeve Tee'; 'Name in URL' is 'sku-22471422'; 'SEO URL' is 'SKU-22471422'; and 'Code' is 'SKU-22471422'. There are also fields for 'Markets', 'Visible to', 'Languages', 'ID, Type', and 'Product'. Below the details are tabs for 'Content', 'Belongs To', 'Pricing', 'Inventory', 'Assets', 'Related Entries', and 'Settings'. The 'Belongs To' tab is active, showing 'Categories' with a 'Variant details' button. Under 'Primary Category', 'Mens Shirts' is selected with a path 'Catalog Root\Fashion\Mens\Mens Shirts' highlighted in a red box. Below is a table for 'Additional Categories' with columns for 'Name' and 'Path'.

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. Go 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. Go 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. Go 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. Go 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.

The screenshot shows the admin interface for a bundle named "Spring outfit". At the top, there are navigation breadcrumbs "Fashion > Womens" and a "Publish?" button. Below this is a settings panel with the following fields:

- Display name: Spring outfit
- Name: Spring outfit
- Name in URL: spring-outfit [Change](#)
- SEO URL: Spring-outfit-en.aspx [Change](#)
- Code: Spring-outfit_1 [Change](#)
- Markets: All [Change](#)
- Visible to: Everyone
- Languages: en, sv
- ID, Type: 757, Fashion Package
- Tools: Tools (dropdown)

Below the settings panel is a tabbed interface with tabs for "Content", "Belongs To", "Package Entries" (selected), "Pricing", "Inventory", "Assets", "Related Entries", and "Settings". Under the "Package Entries" tab, there is a section "Entries included in this package" with a table:

Name	Quantity	Path	Group
French Terry Pant	1	Catalog Root\Fashion\Womens\Womens Bottoms\French Terry Pant	Default
French Terry Stripe Tunic	1	Catalog Root\Fashion\Womens\Womens Tees\French Terry Stripe Tunic	Default

At the bottom of the table, there is an "Edit entries" link.

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.


Fashion > Womens > Womens Tees > **3 colored T shirts** Publish? ▾

Display name	<input type="text" value="3 colored T shirts"/>	Markets	All Change
Name	<input type="text" value="3 colored T shirts"/>	Visible to	Everyone
Name in URL	3-colored-t-shirts Change	Languages	en,sv
SEO URL	3-colored-T-shirts-en.aspx Change	ID, Type	758, Fashion Bundle
Code	3-colored-T-shirts_1 Change		<input type="button" value="Tools"/> ▾

Content Belongs To **Bundle Entries** Assets Related Entries Settings

Entries included in this bundle ✕

Name	Quantity	Path	Group
 V-Neck Tee	1	Catalog Root\Fashion\Womens\Womens Tees\V-Neck Tee	Default
 Scoop Neck Tee with Pocket	1	Catalog Root\Fashion\Womens\Womens Tees\Scoop Neck Tee with Pocket	Default
 Essential Short Sleeve Crew Tee	1	Catalog Root\Fashion\Womens\Womens Tees\Essential Short Sleeve Crew Tee	Default

 [Edit entries](#)

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:
 - Open the item's context menu.
 - Click **Delete**.
 - 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

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

Tip: To learn how Optimizely CMS handles content versioning, see [Working with versions](#).

Multiple language support

Optimizely Commerce generates a version for every enabled language automatically. For example, if you create a catalog entry that supports multiple languages, Optimizely Commerce generates a version for each language. In Optimizely 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 Optimizely 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.

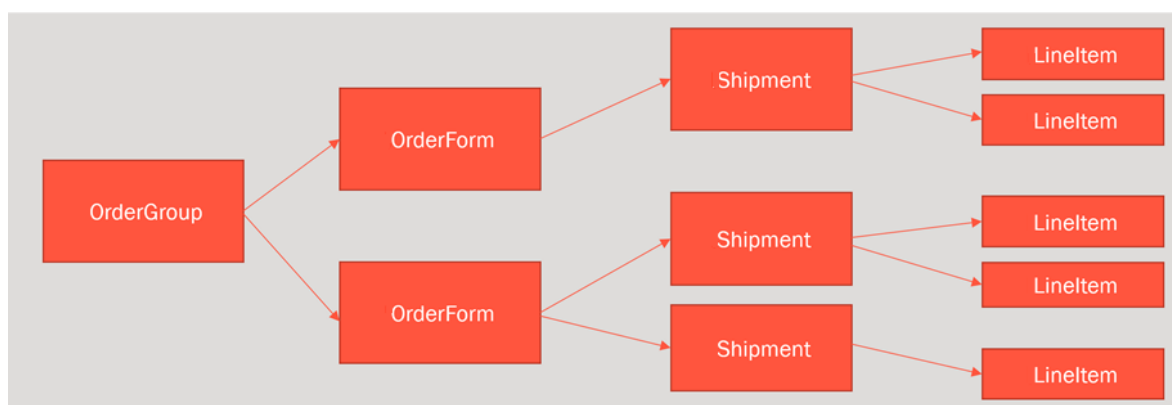
Carts versus orders

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*.

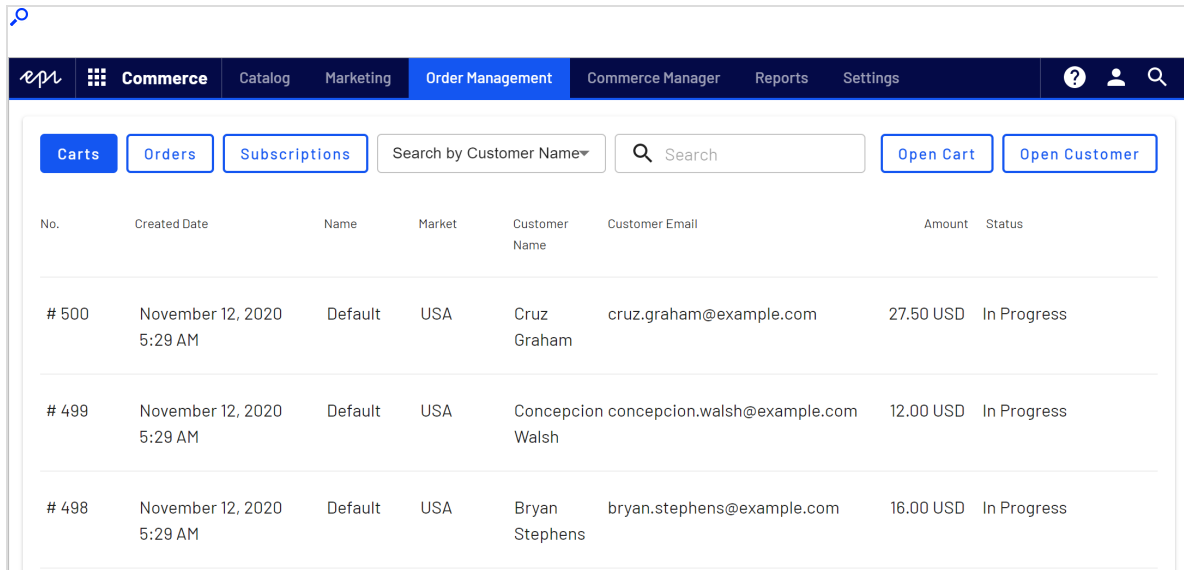
When you create meta-fields and meta-classes, you can use them in the product catalog. Meta-classes and meta-fields for catalogs are defined in the **Catalog System** part of **System Administration**. See also: [Catalog meta-classes and meta-fields](#).

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.



The screenshot shows the Order Management interface. At the top, there is a navigation bar with tabs for Catalog, Marketing, Order Management (selected), Commerce Manager, Reports, and Settings. Below the navigation bar, there are buttons for Carts, Orders, and Subscriptions. A search bar is present with the text "Search by Customer Name" and a search icon. To the right of the search bar are buttons for "Open Cart" and "Open Customer". Below these elements is a table with the following columns: No., Created Date, Name, Market, Customer Name, Customer Email, Amount, and Status. The table contains three rows of data.

No.	Created Date	Name	Market	Customer Name	Customer Email	Amount	Status
# 500	November 12, 2020 5:29 AM	Default	USA	Cruz Graham	cruz.graham@example.com	27.50 USD	In Progress
# 499	November 12, 2020 5:29 AM	Default	USA	Concepcion Walsh	concepcion.walsh@example.com	12.00 USD	In Progress
# 498	November 12, 2020 5:29 AM	Default	USA	Bryan Stephens	bryan.stephens@example.com	16.00 USD	In Progress

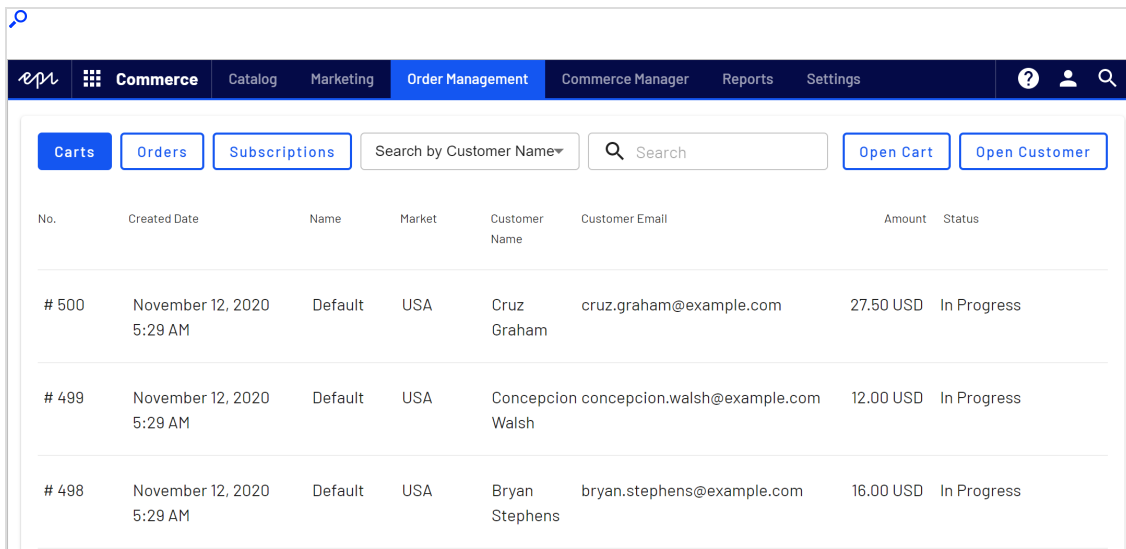
Viewing and updating customer information

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

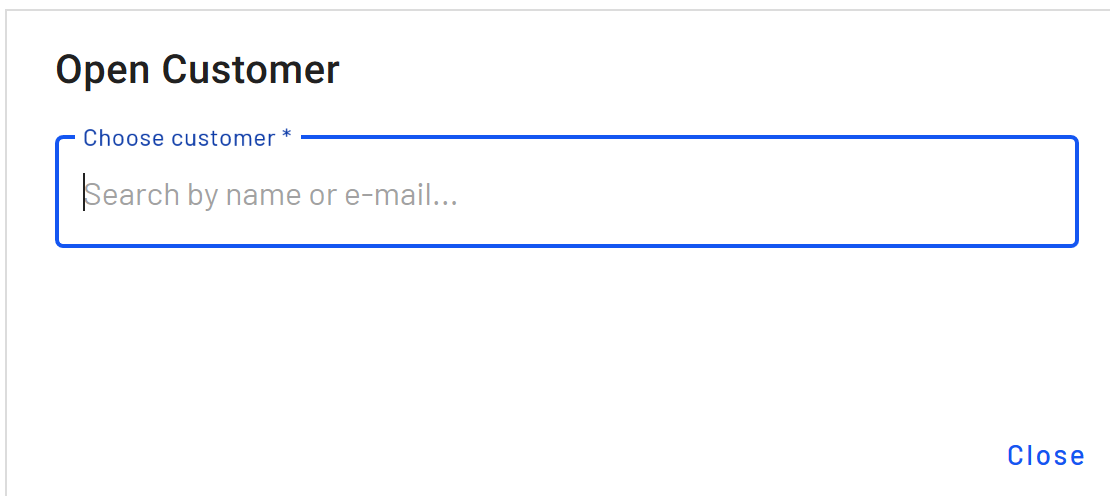
Searching for customers

To quickly find a customer, follow these steps.

1. From the Order management screen, click **Open Customer**.

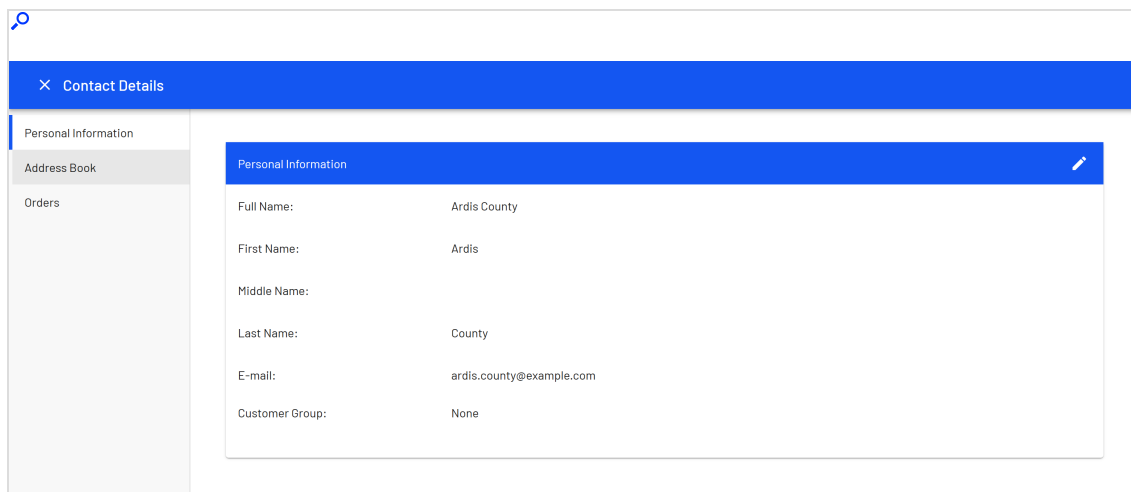


2. In the **Choose customer** field, enter any portion of the customer's name or email address. As you enter more characters, you get fewer search results.



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.



The screenshot shows a web interface for 'Contact Details'. On the left is a sidebar with three tabs: 'Personal Information' (selected), 'Address Book', and 'Orders'. The main content area has a blue header 'Personal Information' with an edit icon. Below the header, the following information is displayed:

Full Name:	Ardis County
First Name:	Ardis
Middle Name:	
Last Name:	County
E-mail:	ardis.county@example.com
Customer Group:	None

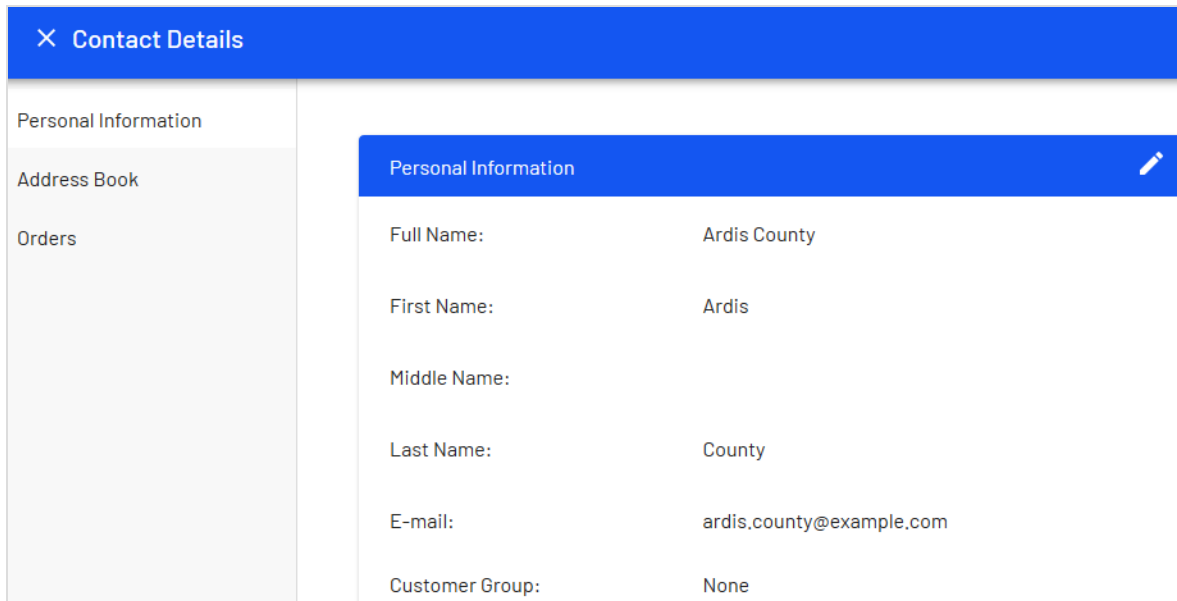
Updating customer information

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**.

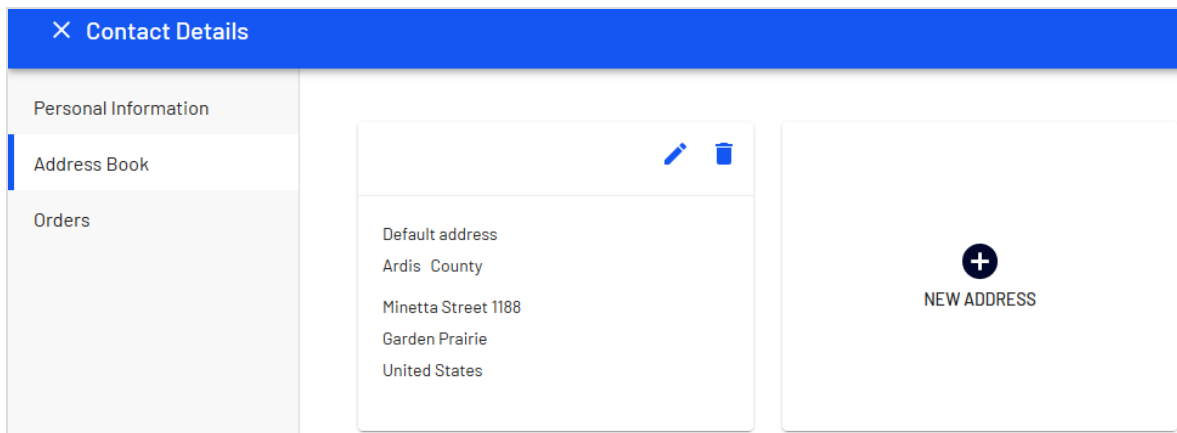
Personal Information tab

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



Address Book tab

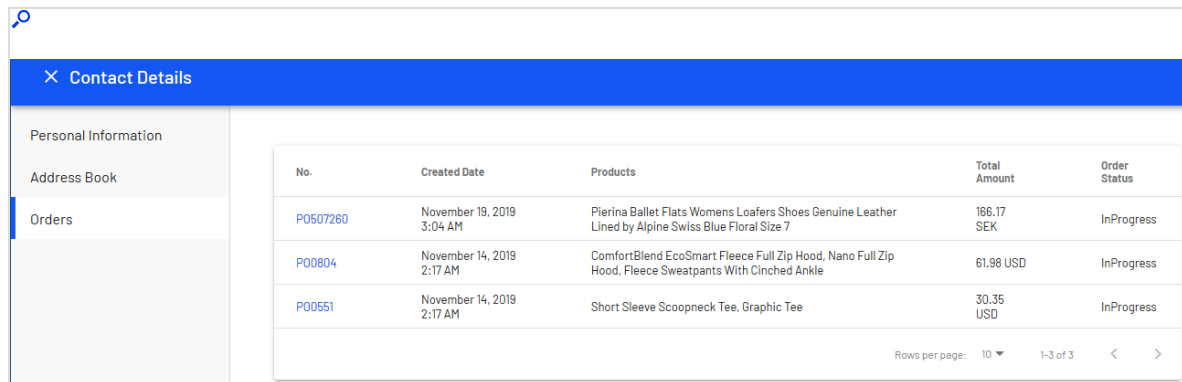
Initially, you see all of a customer's addresses.



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.



No.	Created Date	Products	Total Amount	Order Status
P0507260	November 19, 2019 3:04 AM	Pierina Ballet Flats Womens Loafers Shoes Genuine Leather Lined by Alpine Swiss Blue Floral Size 7	166.17 SEK	InProgress
P00804	November 14, 2019 2:17 AM	ComfortBlend EcoSmart Fleece Full Zip Hood, Nano Full Zip Hood, Fleece Sweatpants With Cinched Ankle	61.98 USD	InProgress
P00551	November 14, 2019 2:17 AM	Short Sleeve Scoopneck Tee, Graphic Tee	30.35 USD	InProgress

Rows per page: 10 1-3 of 3

You can click any order to see and edit its details. See [Working with purchase orders](#).

Working with carts

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

A shopping cart is created when a visitor clicks **Add to cart** for example on a product page. If needed, you can manually manage shopping carts from **Order Management > Carts** where you can view carts, and convert them into a purchase order or [subscription](#). 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.

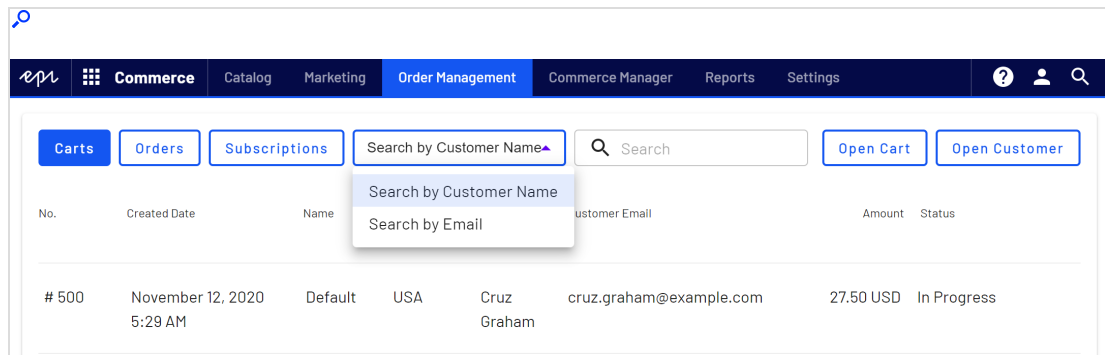
When a cart's checkout is complete and payment is submitted, the cart is converted to an [order](#). At that point, the cart disappears from the **Carts** list, and appears in the purchase order list.

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

You can also search for shopping carts from the **Open Cart** dialog:

1. Click **Open Cart**.

The screenshot shows the 'Order Management' section of a commerce platform. At the top, there is a navigation bar with 'Order Management' selected. Below the navigation, there are tabs for 'Carts', 'Orders', and 'Subscriptions', with 'Carts' being the active tab. A search bar labeled 'Search by Customer Name' is present, along with a search icon and a search input field. To the right of the search bar are two buttons: 'Open Cart' and 'Open Customer'. Below these elements is a table with the following data:

No.	Created Date	Name	Market	Customer Name	Customer Email	Amount	Status
# 500	November 12, 2020 5:29 AM	Default	USA	Cruz Graham	cruz.graham@example.com	27.50 USD	In Progress
# 499	November 12, 2020 5:29 AM	Default	USA	Concepcion Walsh	concepcion.walsh@example.com	12.00 USD	In Progress
# 498	November 12, 2020 5:29 AM	Default	USA	Bryan Stephens	bryan.stephens@example.com	16.00 USD	In Progress

2. Select a market for the cart.

The screenshot shows the 'Open Cart' modal form. It has a title 'Open Cart' at the top. Below the title is a dropdown menu labeled 'Choose Market' with 'USA' selected. Below the dropdown is a text input field labeled 'Choose customer *'. At the bottom left of the form is a blue button labeled 'New Customer'. At the bottom right is a blue link labeled 'Cancel'.

- 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.

Cart Details

Convert to Purchase Order Convert to Subscription

Summary Form Details Contact Details Notes

Cart Number	496
Created Date	January 4, 2021 7:58 AM
Order Level Discounts	0.00 USD
Cart Total	23.50 USD

Market: Choose Market USA

Currency: USD

Close

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](#).

Notes tab

You can add *notes* associated with both carts, [orders](#), and [subscriptions](#). Notes are listed by creation date under the **Notes** tab, where you can access details like description and note creator.

× Cart Details

Convert to Purchase Order Convert to Subscription

Summary Form Details Contact Details **Notes**

New Note

CREATED BY	CREATED DATE	TITLE	DESCRIPTION
admin@example.com	January 4, 2021 9:40 AM	Splitting of order	Contact this customer regarding splitting of order, there was a special request.

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.

Cart Details

Convert to Purchase Order Convert to Subscription



Summary **Form Details** Contact Details Notes

Shipments

NO	RECIPIENT NAME	SHIPPING ADDRESS	SHIPPING METHOD	TRACKING NO	SHIPMENT STATUS	SHIPPING COST	SHIPPING TAX	TOTAL (INCL TAX)
1					Awaiting Inventory	0.00	0.00	23.50 USD

Line Items

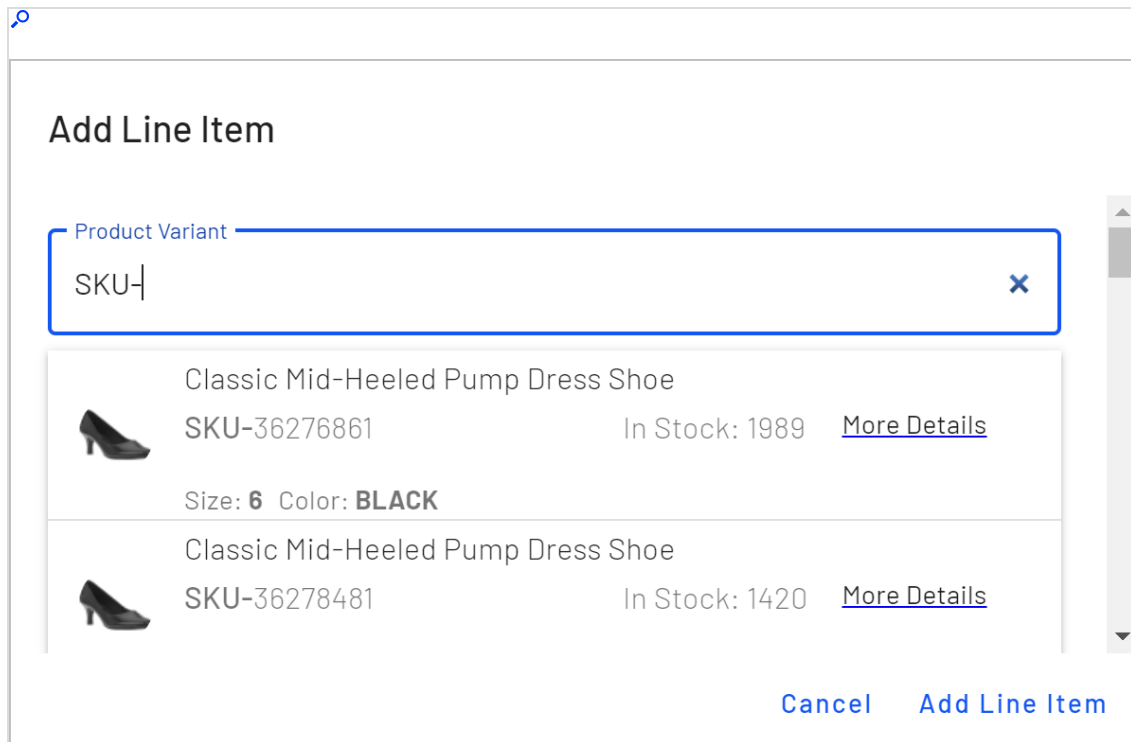
Add Line Items

<input type="checkbox"/>	NAME	PLACED PRICE	SHIPMENT NO	SHIPMENT STATUS	TOTAL DISCOUNT	QUANTITY	TOTAL
<input type="checkbox"/>	 Chevron Stripe Essential Tank Maxi Dress SKU-41136690	10 USD	1	Awaiting Inventory	0.00 USD	2	20.00 USD
<input type="checkbox"/>	 Short Sleeve Crew Tee SKU-38426376	3.5 USD	1	Awaiting Inventory	0.00 USD	1	3.50 USD

Line Item Total 23.50 USD
Shipping Total 0.00 USD

Close

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

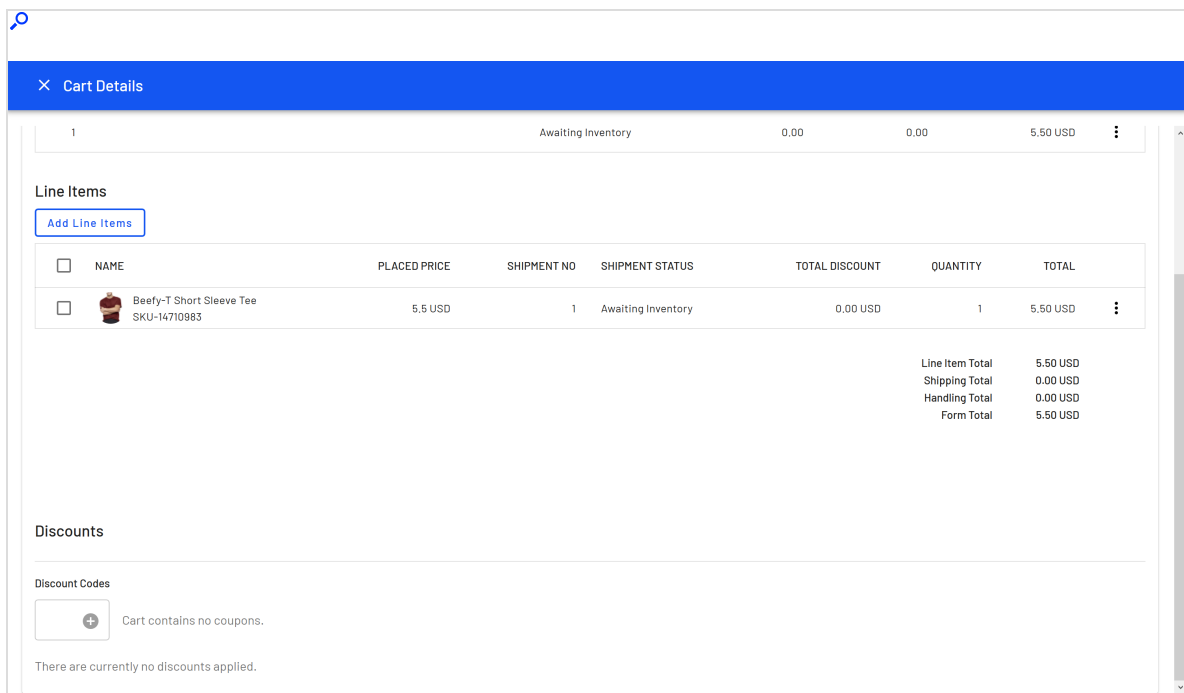
Every shipment needs a shipping address. On the **Cart Details** screen, it appears below the customer information and above the line items.

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.



The screenshot shows the 'Cart Details' screen. At the top, there is a blue header with a search icon and the text 'Cart Details'. Below the header, there is a table with one row showing a quantity of 1, the status 'Awaiting Inventory', a price of 0.00, a quantity of 0.00, and a total of 5.50 USD. Below this is a section titled 'Line Items' with an 'Add Line Items' button. A table lists the line items with columns for NAME, PLACED PRICE, SHIPMENT NO, SHIPMENT STATUS, TOTAL DISCOUNT, QUANTITY, and TOTAL. The first item is 'Beefy-T Short Sleeve Tee' with SKU-14710983, a price of 5.5 USD, quantity 1, and status 'Awaiting Inventory'. Below the table is a summary table with columns for Line Item Total, Shipping Total, Handling Total, and Form Total. The values are 5.50 USD, 0.00 USD, 0.00 USD, and 5.50 USD respectively. At the bottom, there is a 'Discounts' section with a 'Discount Codes' area that says 'Cart contains no coupons.' and 'There are currently no discounts applied.'

NAME	PLACED PRICE	SHIPMENT NO	SHIPMENT STATUS	TOTAL DISCOUNT	QUANTITY	TOTAL
Beefy-T Short Sleeve Tee SKU-14710983	5.5 USD	1	Awaiting Inventory	0.00 USD	1	5.50 USD

Line Item Total	5.50 USD
Shipping Total	0.00 USD
Handling Total	0.00 USD
Form Total	5.50 USD

Discounts

Discount Codes

Cart contains no coupons.

There are currently no discounts applied.

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**.

Open Cart

Choose Market

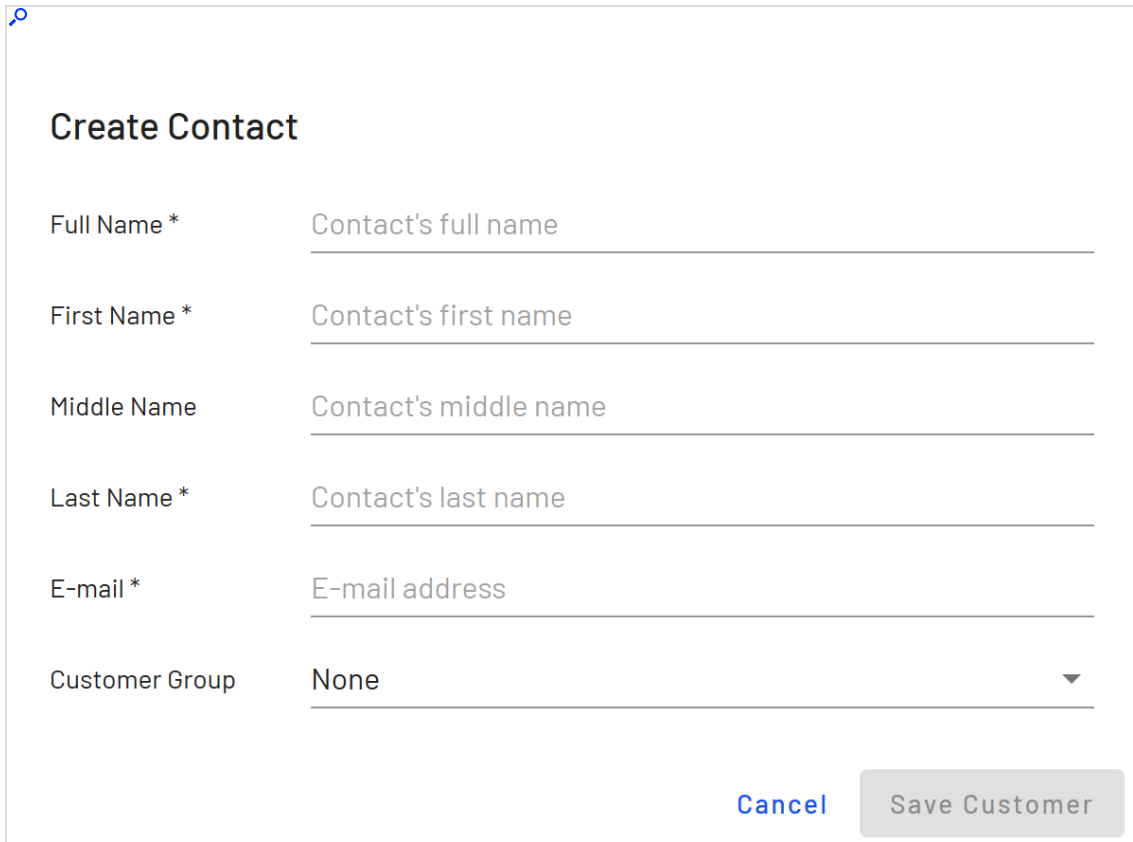
USA ▼

Choose customer *

New Customer

Cancel

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



Create Contact

Full Name *	Contact's full name
First Name *	Contact's first name
Middle Name	Contact's middle name
Last Name *	Contact's last name
E-mail *	E-mail address
Customer Group	None ▼

[Cancel](#)

5. Click **Create a cart**.

Open Cart

Choose Market
USA

Choose customer *
John Doe

New Customer

Cancel 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](#) and [Converting a cart to a subscription](#).

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, the [cart](#) is converted to a purchase order. If needed, you can manually convert a cart to a purchase order from **Cart Details**. Alternatively, you can create a new purchase order.

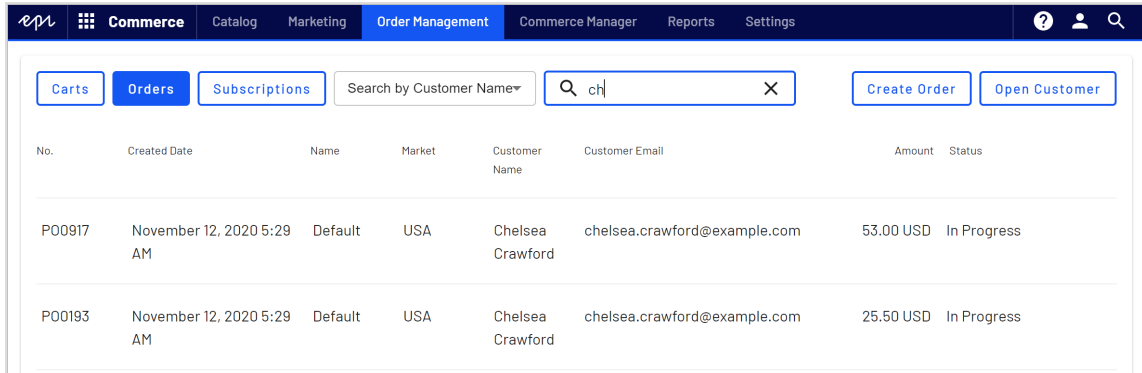
While the purchase order's status is **In Progress**, you can edit any of its information (shipping address or method, line items, discounts, and so) on by clicking the **Form Details** tab.

You can add *notes* associated with an order. Notes are listed by creation date under the **Notes** tab, where you can access details like description and note creator.

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.

✕ Cart Details

Convert to Purchase Order Convert to Subscription

Summary Form Details Contact Details Notes

Cart Number	496
Created Date	January 4, 2021 7:58 AM
Order Level Discounts	0.00 USD
Cart Total	23.50 USD

Market Choose Market

USA ▼

Currency Currency

USD ▼

Creating an order

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

1. From the **Order Management** screen, click **Orders > Create Order**.

The screenshot shows the 'Order Management' section of the Optimizely Commerce interface. The navigation bar includes 'Commerce', 'Catalog', 'Marketing', 'Order Management', 'Commerce Manager', 'Reports', and 'Settings'. Below the navigation, there are tabs for 'Carts', 'Orders', and 'Subscriptions', along with a search bar and buttons for 'Create Order' and 'Open Customer'. The main content area displays a table of orders with the following data:

No.	Created Date	Name	Market	Customer Name	Customer Email	Amount	Status
P01001540	November 16, 2020 9:09 AM	Default	USA	Lakendra Patterson	lakendra.patterson@example.com	13.00 USD	Completed
P00302	November 16, 2020 3:42 AM	Default	USA	Cruz Graham	cruz.graham@example.com	59.50 USD	In Progress

2. Choose the order's market.

Create Order

Choose Market
USA

Choose customer *
Search by name or e-mail...

New Customer

Cancel Create Order

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.

Edit Shipment

Choose Shipping Address *

Rose's Street 627, Derry, Ireland ▲

Rose's Street 627, Derry, Ireland Add Address Edit Address

Express USD (1 day)(en) ▼

Close Save



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*.

Add Line Item

Product Variant

✕

	Classic Mid-Heeled Pump Dress Shoe	SKU-36276861	In Stock: 1989	More Details
		Size: 6 Color: BLACK		
	Classic Mid-Heeled Pump Dress Shoe	SKU-36278481	In Stock: 1420	More Details

Cancel
Add Line Item

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

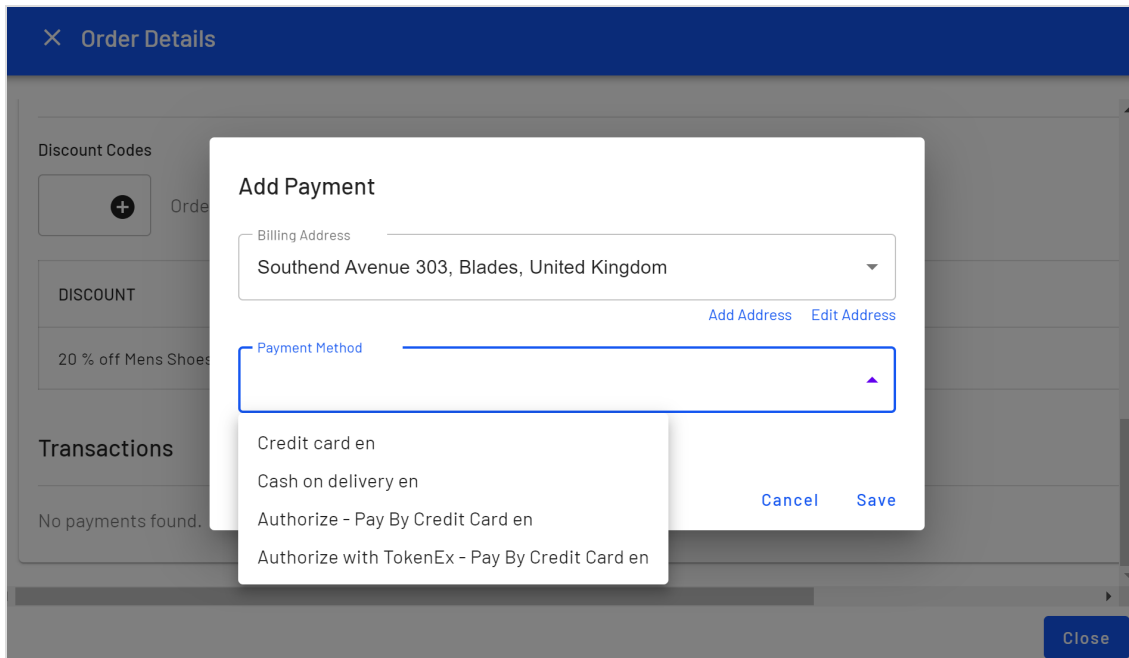
Tip: To view detailed information of the line item, click **More Details**. The respective product page on your e-commerce website opens in a new tab.

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](#).

Adding a payment method

1. From the **Order Management** screen, click **Orders**.
2. Select the order you want to edit.
3. Click **Form Details** and then **Add Payment** at the bottom of the form.
4. Select the appropriate payment method from the list of payment methods available for your site. Available payment methods are site-specific.

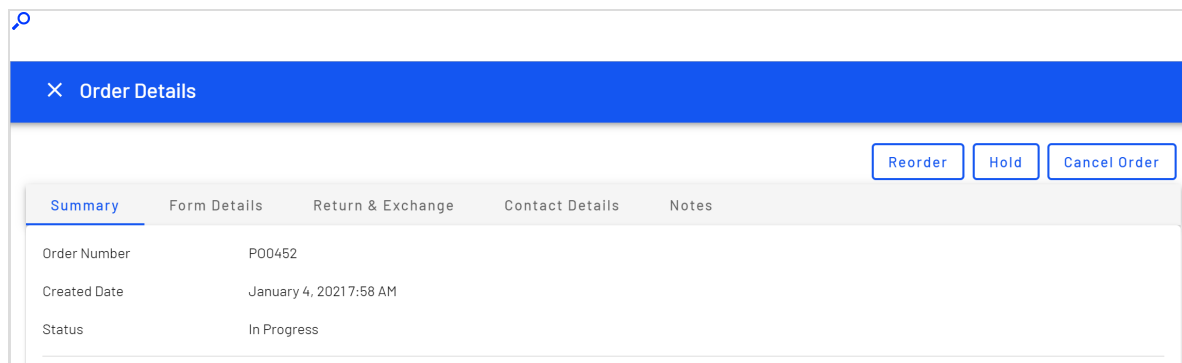


5. Click **Save**.

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.

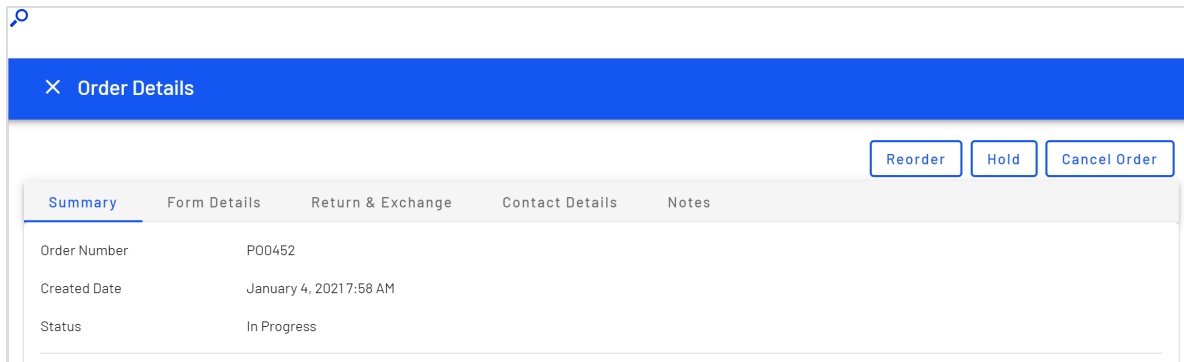
To place an order on hold, click **Order Management** and select the order. Then, on the **Order Details** screen, click **Hold**.



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](#).

Repeating an order

You can repeat past orders basing the new order on the information available in a previous order.

1. Go to **Order Management** and select the order, either from the **Orders** list, or by opening the customer.
2. Click **Reorder**. A new draft order is created with the same address, shipping method, and line item information. Should items not be available anymore you will see a notification in the order summary.
3. Update the information if needed and click **Create Order**.

Note: If the base order has coupon code, the new draft order will also apply the coupon discount. Ensure to validate that the coupon has not expired.

The screenshot shows the 'Order Details' page with a blue header and a navigation bar. The 'Form Details' tab is active. The 'Shipments' section contains a table with one row of shipment data. The 'Line Items' section contains a table with one row of item data.

NO	RECIPIENT NAME	SHIPPING ADDRESS	SHIPPING METHOD	TRACKING NO	SHIPMENT STATUS	SHIPPING COST	SHIPPING TAX	TOTAL (INCL TAX)
1	Sherril It	Herbet Street 1409, Dublin, Ireland	Express USD (1 day)		Awaiting Inventory	20.00	0.00	31.50 USD

NAME	PLACED PRICE	SHIPMENT NO	SHIPMENT STATUS	TOTAL DISCOUNT	QUANTITY	TOTAL
Classic Mid-Heeled Pump Dress Shoe SKU-36278480	11.5 USD	1	Awaiting Inventory	0.00 USD	1	11.50 USD

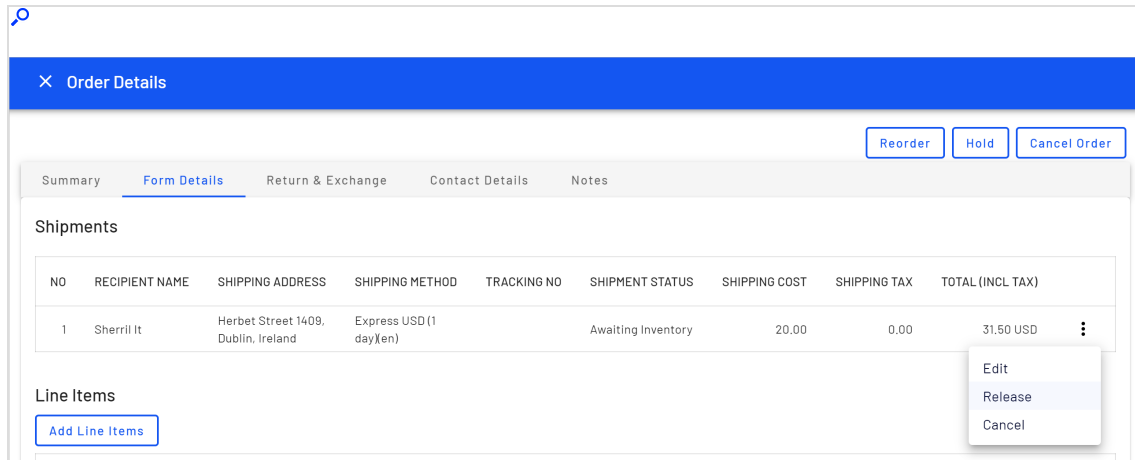
Adjusting an order's shipment status

Note: For information about order status versus shipment status, see [Shipment, order and return statuses](#).

- 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**.
- 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.

 **Add New Address**

Address Name *

First Name Last Name *

Address Line 1 *

Address Line 2

City * ZIP / PostalCode

Country* State / Province / Region

Phone Number E-mail

Add to customer's address book

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

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.

<input type="checkbox"/>	RETURN NO.	CREATED DATE	CREATED BY	STATUS	RETURN TOTAL
<input type="checkbox"/>	RMA976415	January 11, 2021 1:42 PM	admin@example.com	Awaiting Completion	9.00 USD





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.





- 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.

Line Items							
Create Return							
<input checked="" type="checkbox"/>	NAME	PLACED PRICE	SHIPMENT NO	SHIPMENT STATUS	TOTAL DISCOUNT	QUANTITY	TOTAL
<input checked="" type="checkbox"/>	 Puma Hiker Mid Mens Size 9 Tan Nubuck Leather Hiking Boots SKU-39855373	48.5 USD	1	Shipped	9.70 USD	1	38.80 USD
<input checked="" type="checkbox"/>	 Pierina Ballet Flats Womens Loafers Shoes Genuine Leather Lined by Alpine Swiss Blue Floral Size 7 SKU-42708712	14.5 USD	1	Shipped	0.00 USD	1	14.50 USD
<input checked="" type="checkbox"/>	 Classic Mid-Heeled Pump Dress Shoe SKU-36276846	11.5 USD	1	Shipped	0.00 USD	1	11.50 USD
<input checked="" type="checkbox"/>	 Classic Mid-Heeled Pump Dress Shoe SKU-36277594	11.5 USD	1	Shipped	0.00 USD	1	11.50 USD
						Line Item Total	76.30 USD
						Shipping Total	20.00 USD
						Handling Total	0.00 USD
						Form Total	96.30 USD

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

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

Create Return

	Puma Hiker Mid Mens Size 9 Tan Nubuck Leather Hiking Boots SKU-39855373	Shipment No: 1	<input checked="" type="checkbox"/> Return Quantity 1	Return Reason*
	Pierina Ballet Flats Womens Loafers Shoes Genuine Leather Lined by Alpine Swiss Blue Floral Size 7 SKU-42708712	Shipment No: 1	<input type="checkbox"/> Return Quantity 1	Return Reason*
	Classic Mid-Heeled Pump Dress Shoe SKU-36276846	Shipment No: 1	<input type="checkbox"/> Return Quantity 1	Return Reason*
	Classic Mid-Heeled Pump Dress Shoe SKU-36277594	Shipment No: 1	<input type="checkbox"/> Return Quantity 1	Return Reason*

Comment

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

- 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.

Create Refund

Return Items (USD) 86

Invalidated Discounts (USD) -9.7

Exchange Total (USD) 0

Refund Total (USD) 76.3

Cash on delivery (Sale) - 86.3 USD

Amount (USD) 76.3

Payment Method Cash on delivery

Cancel OK

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**.

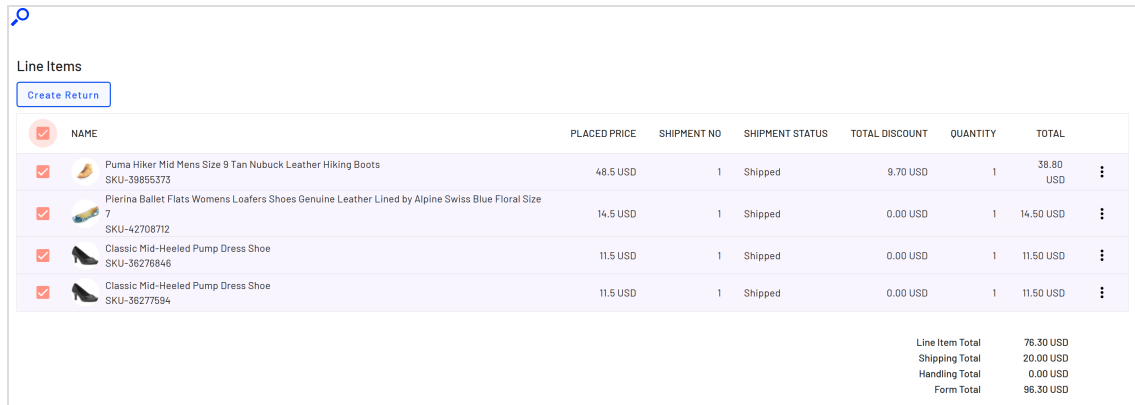
There are two procedures for creating an exchange order. Use [Scenario 1](#) if you have already received the returned items. Use the [Scenario 2](#) if you have not yet received the returns.





Creating an exchange order if you received the returned items

Scenario 1: You have the return 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**.


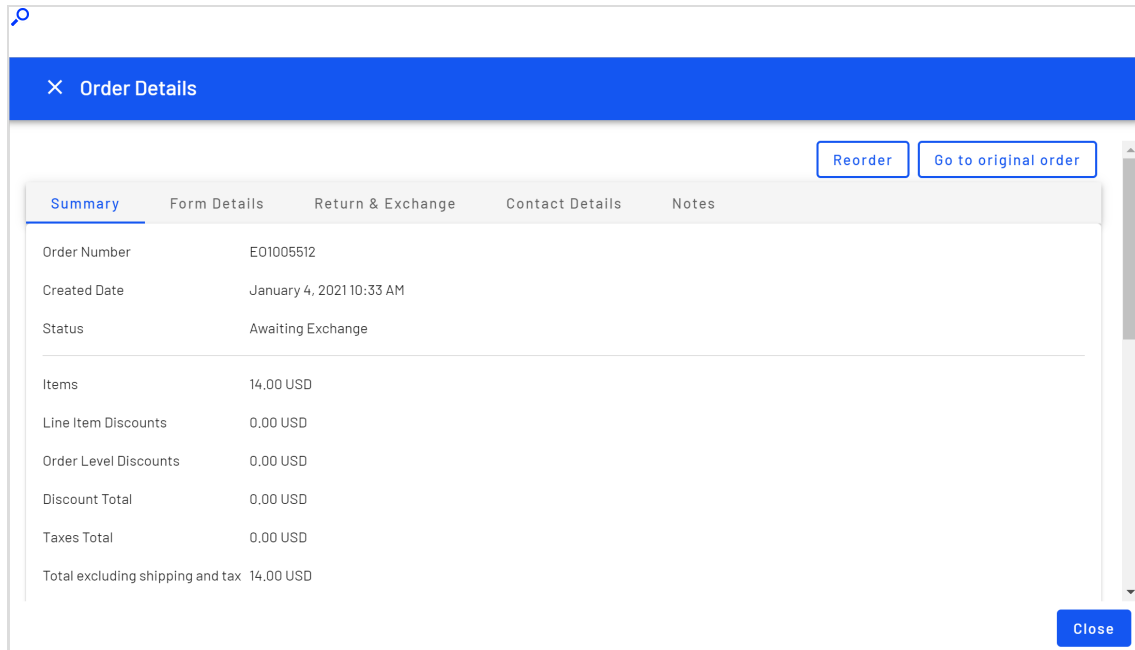
NAME	PLACED PRICE	SHIPMENT NO	SHIPMENT STATUS	TOTAL DISCOUNT	QUANTITY	TOTAL	
 Puma Hiker Mid Mens Size 9 Tan Nubuck Leather Hiking Boots SKU-39855373	48.5 USD	1	Shipped	9.70 USD	1	38.80 USD	
 Pierina Ballet Flats Womens Loafers Shoes Genuine Leather Lined by Alpine Swiss Blue Floral Size 7 SKU-42708712	14.5 USD	1	Shipped	0.00 USD	1	14.50 USD	
 Classic Mid-Heeled Pump Dress Shoe SKU-36276846	11.5 USD	1	Shipped	0.00 USD	1	11.50 USD	
 Classic Mid-Heeled Pump Dress Shoe SKU-36277584	11.5 USD	1	Shipped	0.00 USD	1	11.50 USD	
						Line Item Total	76.30 USD
						Shipping Total	20.00 USD
						Handling Total	0.00 USD
						Form Total	96.30 USD

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**.



The screenshot shows a modal window titled "Order Details" with a blue header. Below the header, there are two buttons: "Reorder" and "Go to original order". The main content area has a tabbed interface with five tabs: "Summary" (selected), "Form Details", "Return & Exchange", "Contact Details", and "Notes". The "Summary" tab displays the following information:

Order Number	E01005512
Created Date	January 4, 2021 10:33 AM
Status	Awaiting Exchange
Items	14.00 USD
Line Item Discounts	0.00 USD
Order Level Discounts	0.00 USD
Discount Total	0.00 USD
Taxes Total	0.00 USD
Total excluding shipping and tax	14.00 USD

A "Close" button is located in the bottom right corner of the modal.

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.

Create Refund

Return Items (USD)
86

Invalidated Discounts (USD)
-9.7

Exchange Total (USD)
0

Refund Total (USD)
76.3

Cash on delivery (Sale) - 86.3 USD

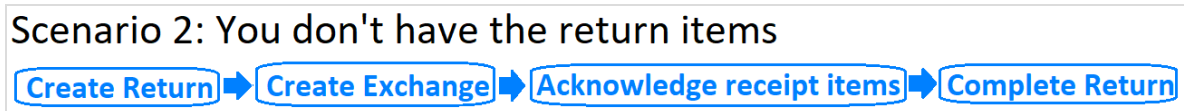
Amount (USD)
76.3

Payment Method
Cash on delivery

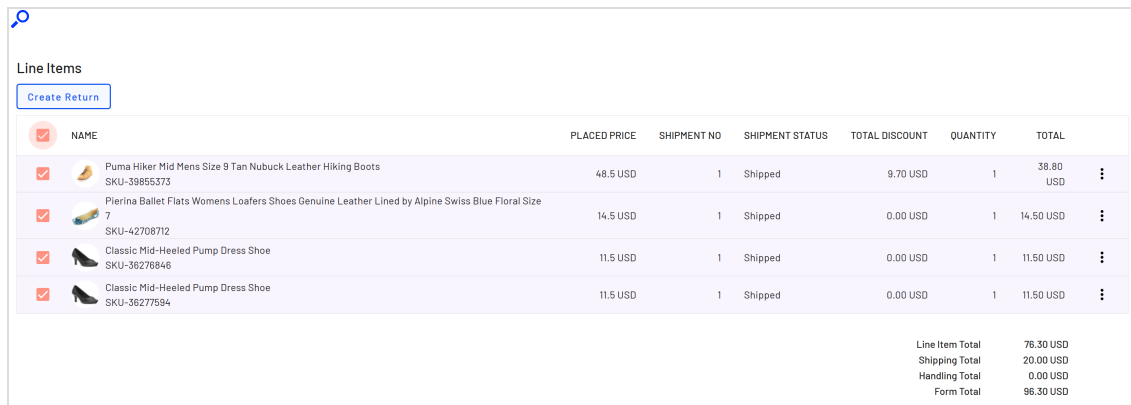
Cancel OK





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**.


NAME	PLACED PRICE	SHIPMENT NO	SHIPMENT STATUS	TOTAL DISCOUNT	QUANTITY	TOTAL
 Puma Hiker Mid Mens Size 9 Tan Nubuck Leather Hiking Boots SKU-39855373	48.5 USD	1	Shipped	9.70 USD	1	38.80 USD
 Pierina Ballet Flats Womens Loafers Shoes Genuine Leather Lined by Alpine Swiss Blue Floral Size 7 SKU-42708712	14.5 USD	1	Shipped	0.00 USD	1	14.50 USD
 Classic Mid-Heeled Pump Dress Shoe SKU-36276846	11.5 USD	1	Shipped	0.00 USD	1	11.50 USD
 Classic Mid-Heeled Pump Dress Shoe SKU-36277584	11.5 USD	1	Shipped	0.00 USD	1	11.50 USD
					Line Item Total	76.30 USD
					Shipping Total	20.00 USD
					Handling Total	0.00 USD
					Form Total	96.30 USD

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.

Create Refund

Return Items (USD) 86

Invalidated Discounts (USD) -9.7

Exchange Total (USD) 0

Refund Total (USD) 76.3

Cash on delivery (Sale) - 86.3 USD

Amount (USD) 76.3

Payment Method Cash on delivery

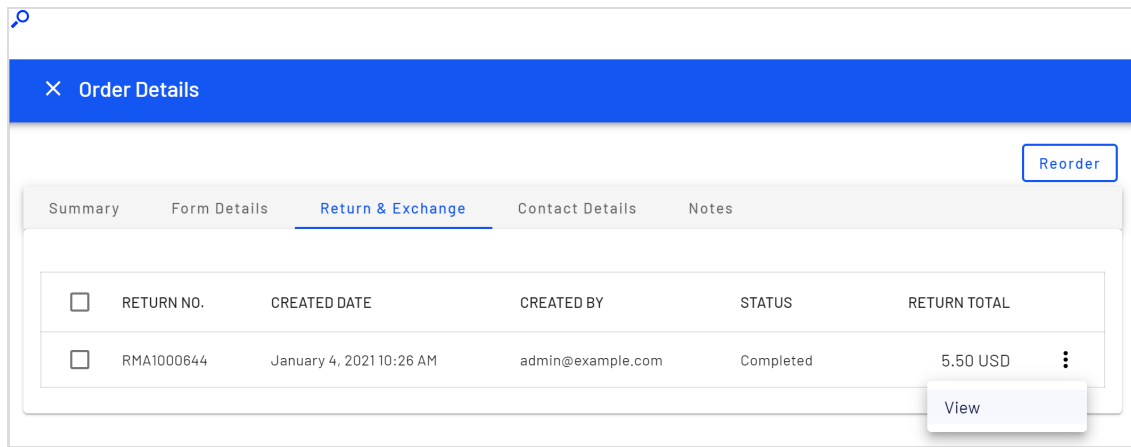
Cancel OK

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.

- From the context menu, click **View**.



- Click **View Exchange**.

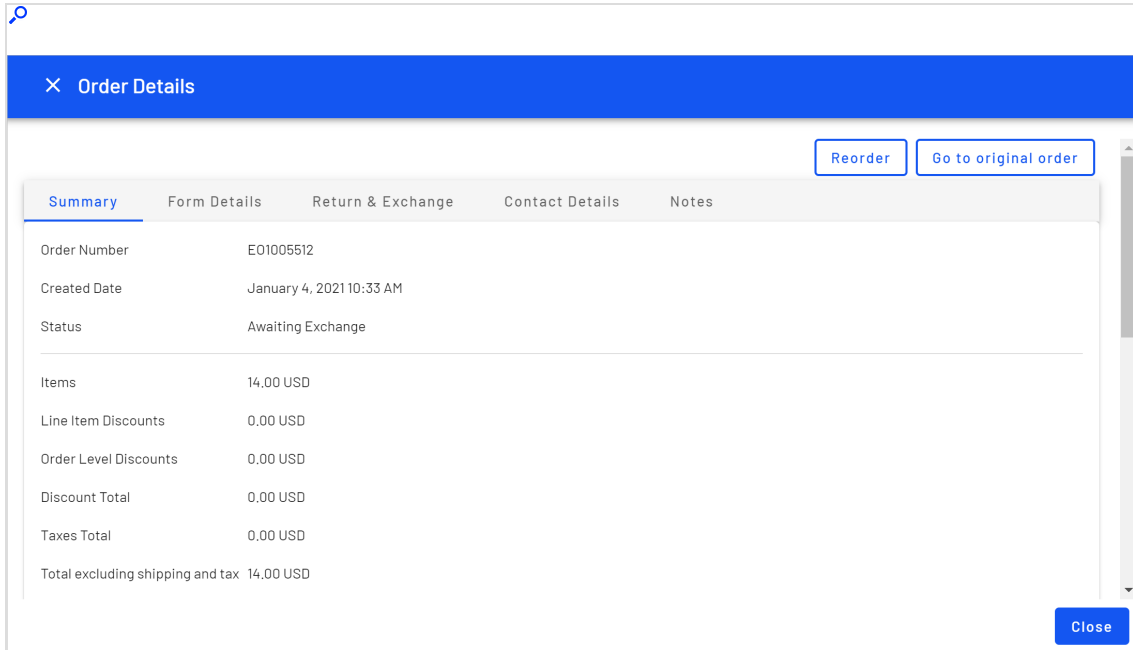


On the **Summary** tab, in the top left, the exchange order number appears in the **Order Number** field.

Viewing an exchange order's parent order

- From the Order Management screen, click **Orders** and select the exchange order. The **Order Details** screen appears.

- From the top right, click **Go to original order**.



Working with subscriptions

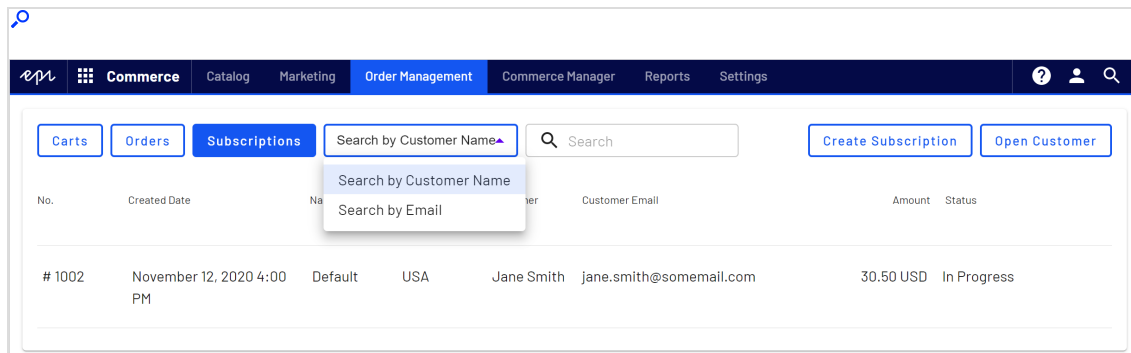
This topic describes how to work with subscriptions on the Order Management screen.


A subscription allows for recurring orders, and for payments to be spread over time, providing flexibility in how you sell your products. Use subscriptions 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 subscription to generate recurring payments. Subscription processing is handled through the Subscription payment plans scheduled job.

Viewing subscriptions

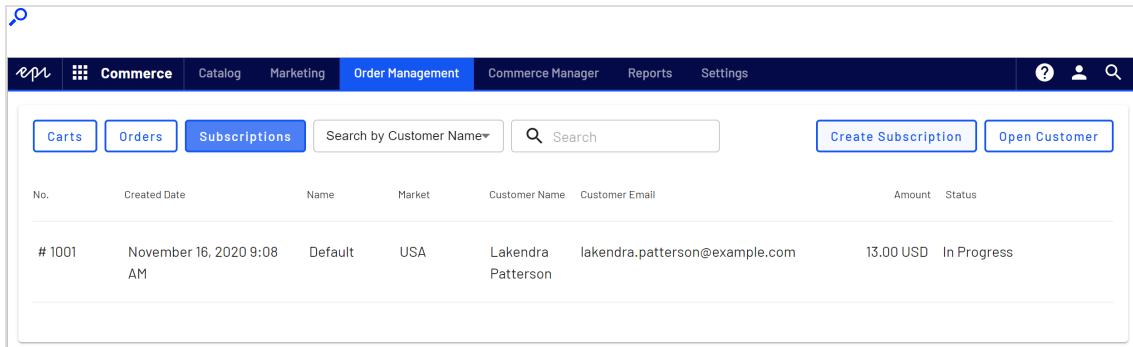
- From the Order Management screen, click **Subscriptions**. All subscriptions appear.
- To narrow down the list, identify the subscription customer by selecting **Search by Name** or **Search by Email**.



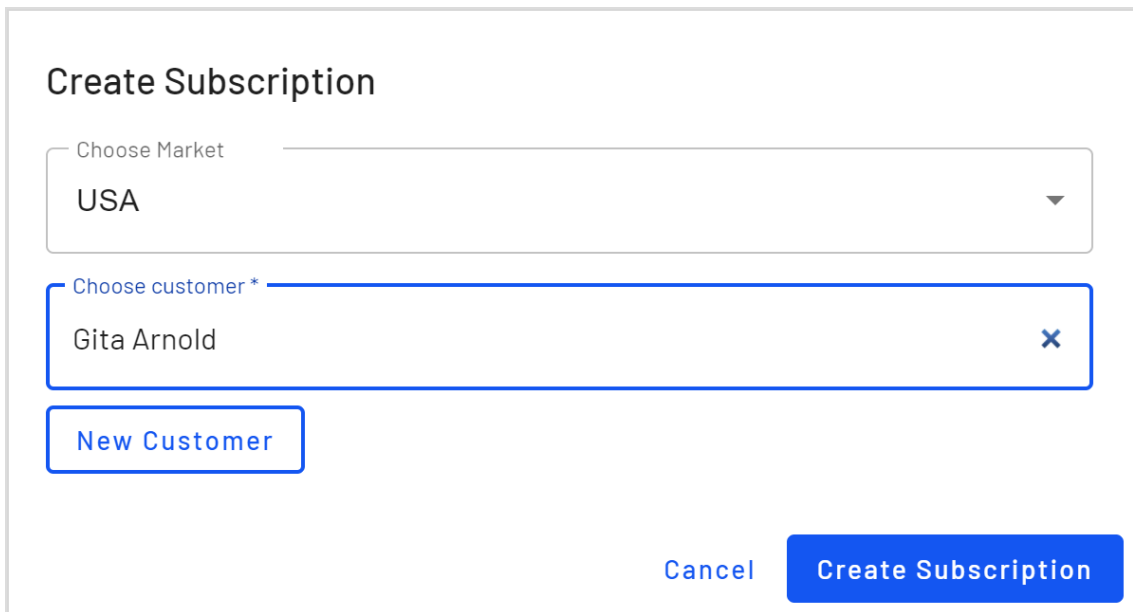
- If you chose **Search by Name**, move to the **Search** box and begin entering the customer's first name. For example, if the customer name is *Bryan Stephens*, enter *B*, *Br*, or *Bry*. Press **Enter** to execute the search.
 - You can enter the entire name, but this takes longer.
 - As you enter 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 subscription 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 subscription, such as cycle length and start date.

Creating a subscription

1. From the Order Management screen, click **Subscriptions**.
2. Click **Create Subscription**.



3. Choose the subscription 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 Subscription**.

- Click the context menu to the right of shipment 1 and click **Edit**.

The screenshot shows the 'Create Subscription' form with the 'Form Details' tab selected. The 'Shipments' section contains a table with the following data:

NO	RECIPIENT NAME	SHIPPING ADDRESS	SHIPPING METHOD	TRACKING NO	SHIPMENT STATUS	SHIPPING COST	SHIPPING TAX	TOTAL (INCL TAX)
1					Awaiting Inventory	0.00	0.00	0.00 USD

A context menu is open over the first row, showing an 'Edit' button. Below the shipments table is the 'Line Items' section with an 'Add Line Items' button and a table with columns: NAME, PLACED PRICE, SHIPMENT NO, SHIPMENT STATUS, TOTAL DISCOUNT, QUANTITY, and TOTAL. The 'Line Item Total' is 0.00 USD. A 'Close' button is at the bottom right.

- Enter the subscription shipping address and shipping method.

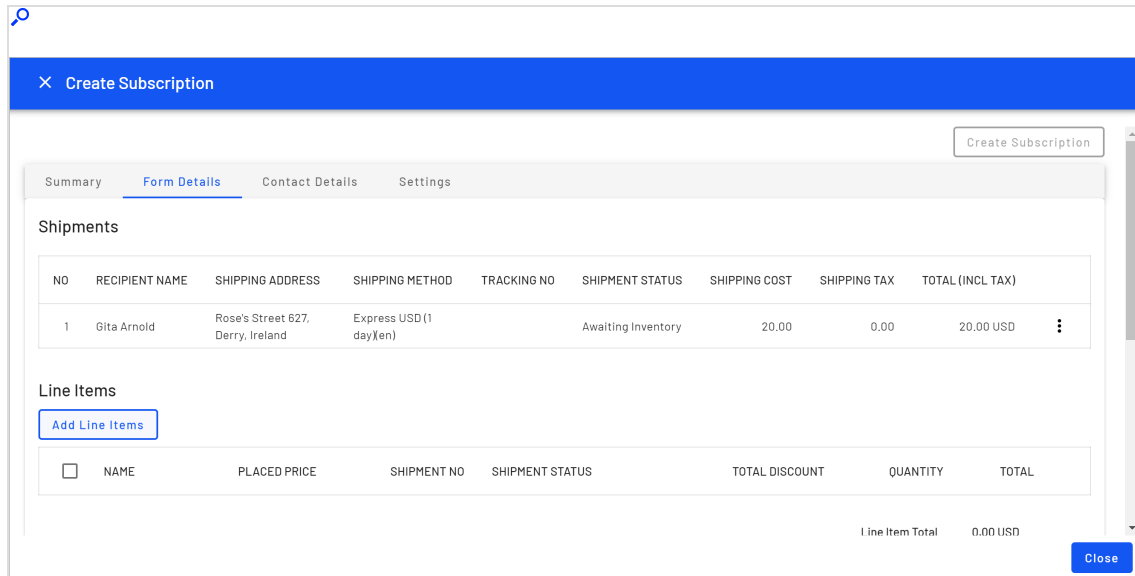
The 'Edit Shipment' dialog box shows the following fields:

- Choose Shipping Address ***: A text input field containing 'Rose's Street 627, Derry, Ireland'. Below it are 'Add Address' and 'Edit Address' links.
- Shipping Method**: A dropdown menu showing 'Express USD (1 day)(en)'.

At the bottom right of the dialog are 'Close' and 'Save' buttons.

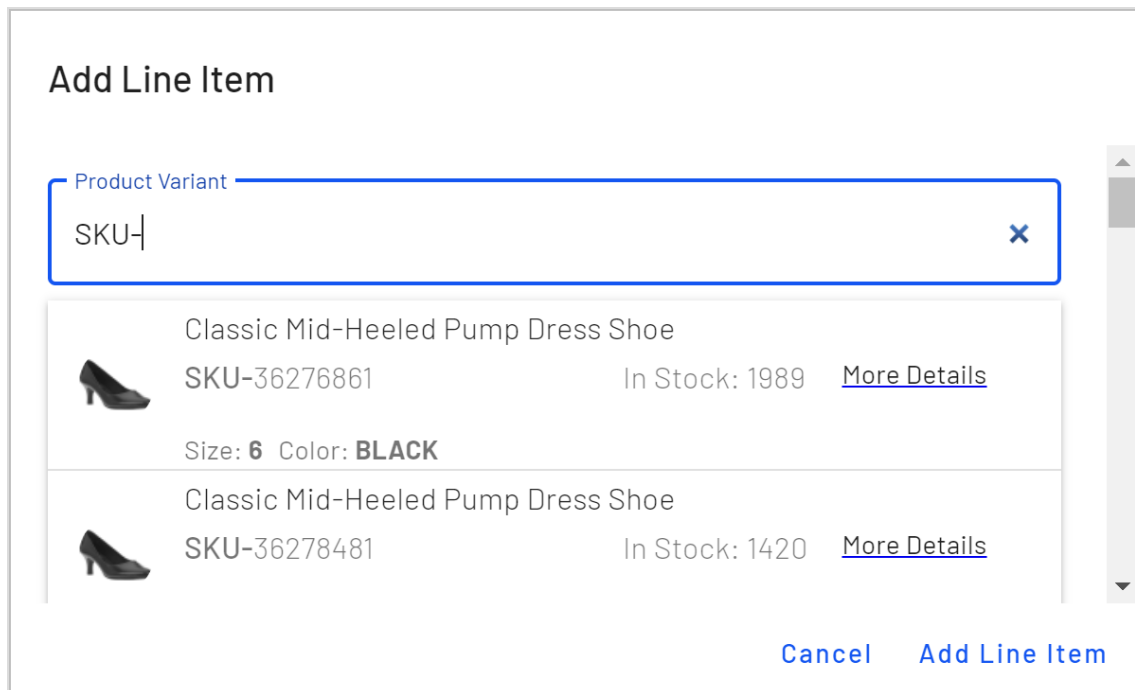
- Click **Save**.

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*.



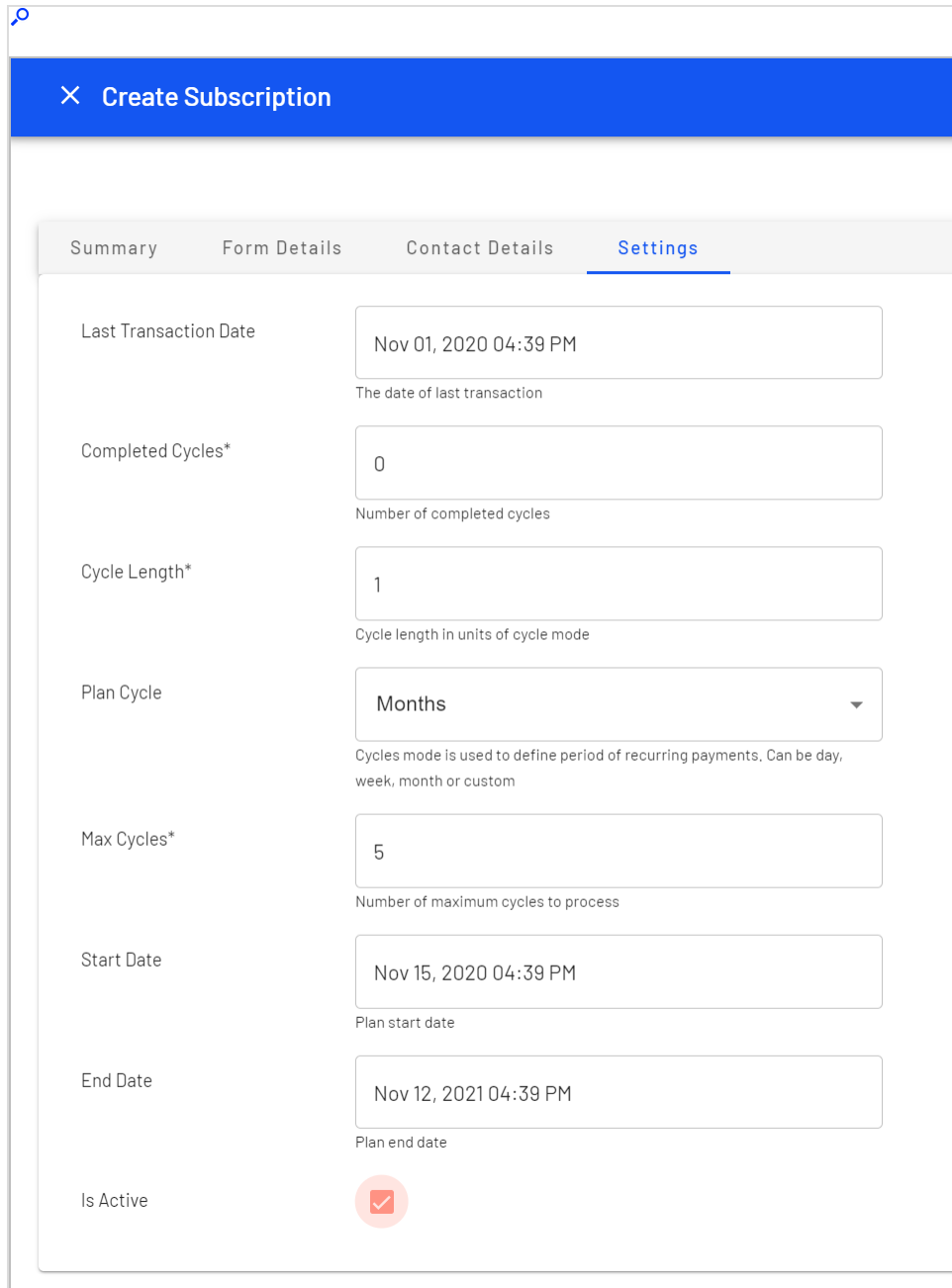
11. Search results appear. Select the line item you want to add.



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 for the subscription.



The screenshot shows a web interface for creating a subscription. At the top, there is a blue header with a close button (X) and the text 'Create Subscription'. Below this is a navigation bar with four tabs: 'Summary', 'Form Details', 'Contact Details', and 'Settings'. The 'Settings' tab is currently selected and underlined. The main content area contains several form fields, each with a label, a value, and a description:

Field Label	Value	Description
Last Transaction Date	Nov 01, 2020 04:39 PM	The date of last transaction
Completed Cycles*	0	Number of completed cycles
Cycle Length*	1	Cycle length in units of cycle mode
Plan Cycle	Months	Cycles mode is used to define period of recurring payments. Can be day, week, month or custom
Max Cycles*	5	Number of maximum cycles to process
Start Date	Nov 15, 2020 04:39 PM	Plan start date
End Date	Nov 12, 2021 04:39 PM	Plan end date
Is Active	<input checked="" type="checkbox"/>	

- **Last Transaction Date.** Logs the last transaction date. Leave the date and time fields as is when you create the subscription.

- **Completed Cycles.** This tallies the number of completed cycles since the subscription was created. When initially creating the subscription, 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)

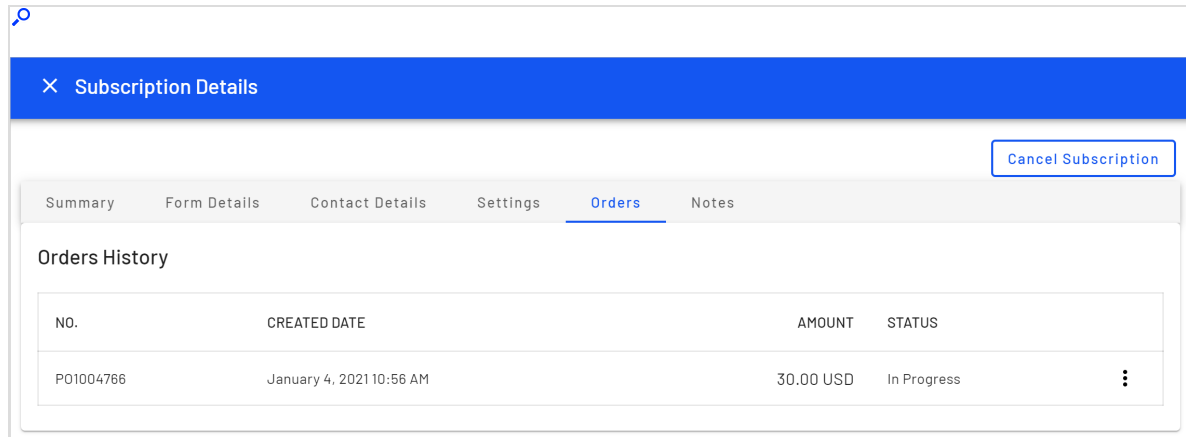
You can choose from the following plan cycles, which determine how often the customer is charged.

- **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.
- **Max Cycles.** Determines the maximum number of cycles to run for this subscription. For example, if the **Max Cycles** is set to **2**, the subscription 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.** Select the check box to enable the subscription. Leave the check box empty to create the subscription and enable it later.

15. Click **Create Subscription**.

Subscription orders

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



The screenshot displays the 'Subscription Details' interface. At the top, there is a blue header bar with a close icon and the text 'Subscription Details'. To the right of the header is a 'Cancel Subscription' button. Below the header is a navigation bar with tabs for 'Summary', 'Form Details', 'Contact Details', 'Settings', 'Orders', and 'Notes'. The 'Orders' tab is currently selected. Underneath the tabs is a section titled 'Orders History' which contains a table with the following data:

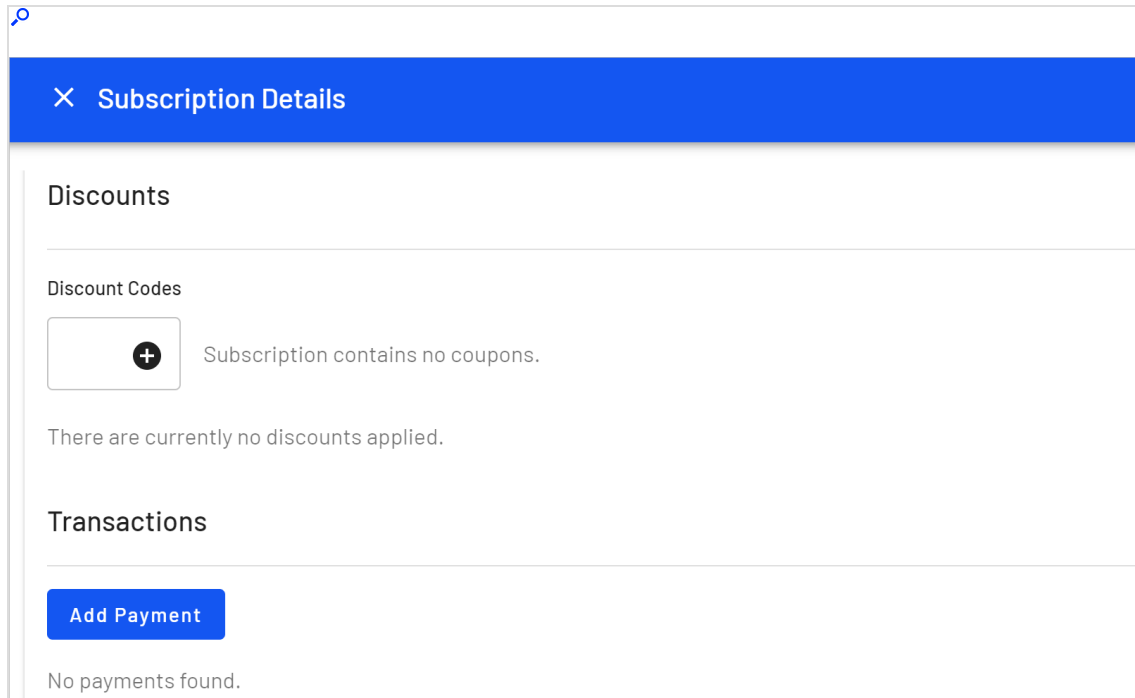
NO.	CREATED DATE	AMOUNT	STATUS	
P01004766	January 4, 2021 10:56 AM	30.00 USD	In Progress	⋮

The subscription begins when the first purchase order is generated. You can create the purchase order manually, or by running the subscription scheduled job (requires administration access).

Creating the first purchase order manually

1. From the Order Management screen, click **Subscriptions**.
2. Choose the subscription you want to create the first purchase order for.
3. On the **Subscription Details** screen, click the **Form Details** tab.

- Click **Add Payment**.



The screenshot shows a modal window titled "Subscription Details" with a blue header bar. Below the header, there are two sections: "Discounts" and "Transactions".

Discounts

Discount Codes

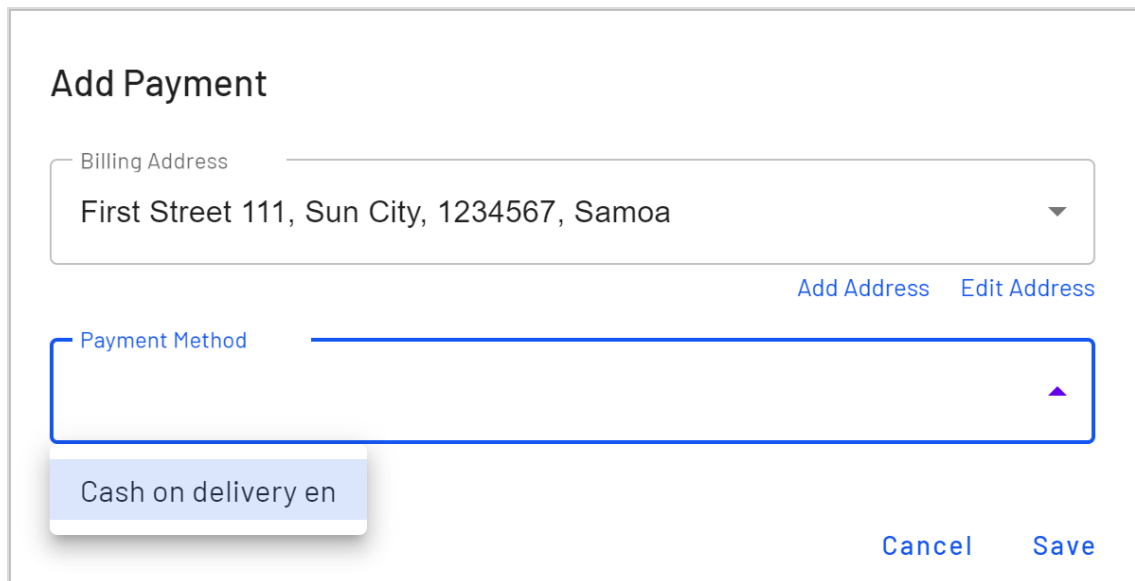
Subscription contains no coupons.

There are currently no discounts applied.

Transactions

No payments found.

- Select a billing address and payment method.



The screenshot shows a modal window titled "Add Payment".

Add Payment

Billing Address

[Add Address](#) [Edit Address](#)

Payment Method

- 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 subscription scheduled job runs and generates the first purchase order.

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

When a payment is added to a subscription, the customer is not charged. The subscription 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).

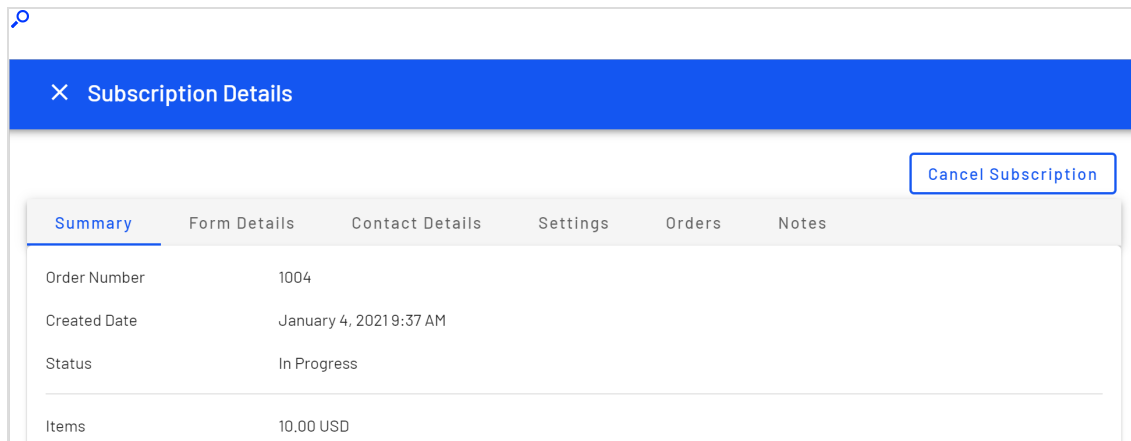
Editing a subscription

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

Canceling a subscription

1. From the Order Management screen, click **Subscriptions**.
2. Click the subscription you want to cancel.

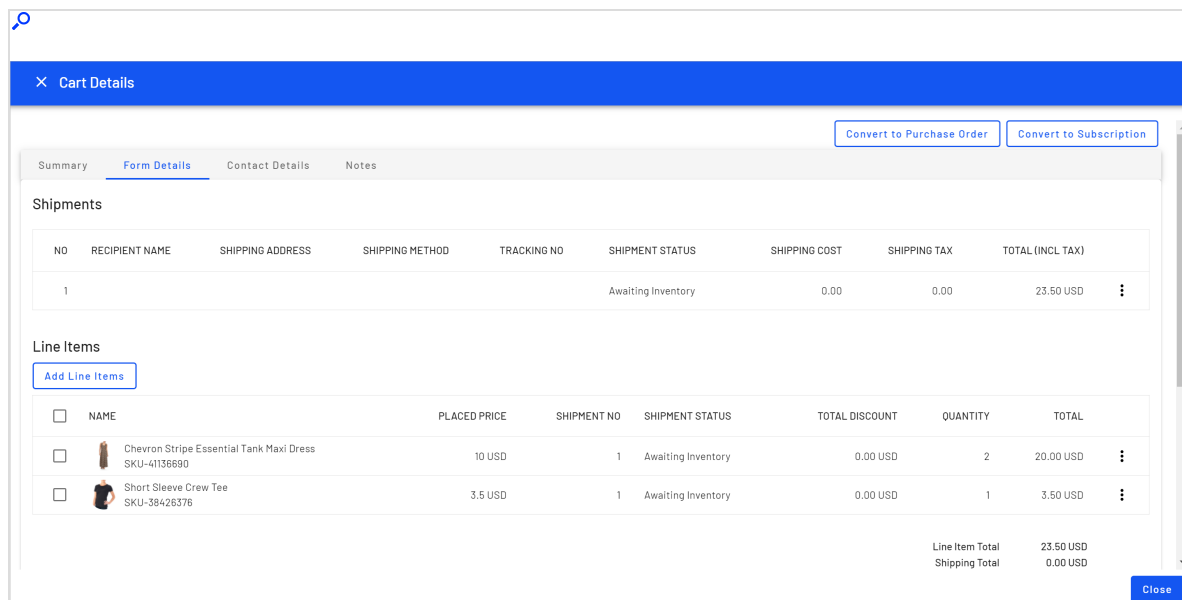
- On the **Subscription Details** screen, click **Cancel Subscription**.



Converting a cart to a subscription

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 subscription for further processing. For example, you want to generate recurring payments for the products added to the cart.

Select **Convert To Subscription** in **Cart Details** to convert a cart to a subscription.



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

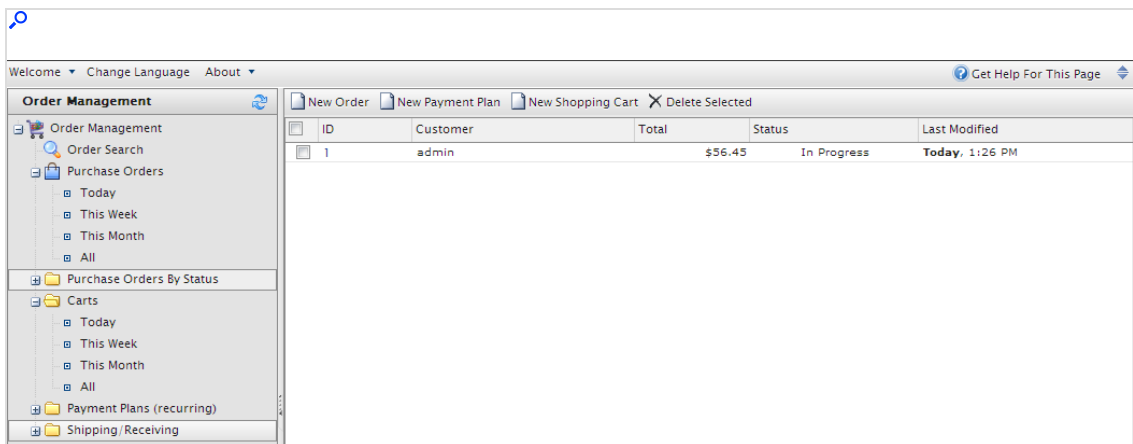
A visitor creates a shopping cart when the visitor clicks **Add to basket** option on any page. You can manually create and manage a shopping cart from **Order Management > Carts** where you can view registered and anonymous customer carts and manually convert a cart into a purchase order. See also: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

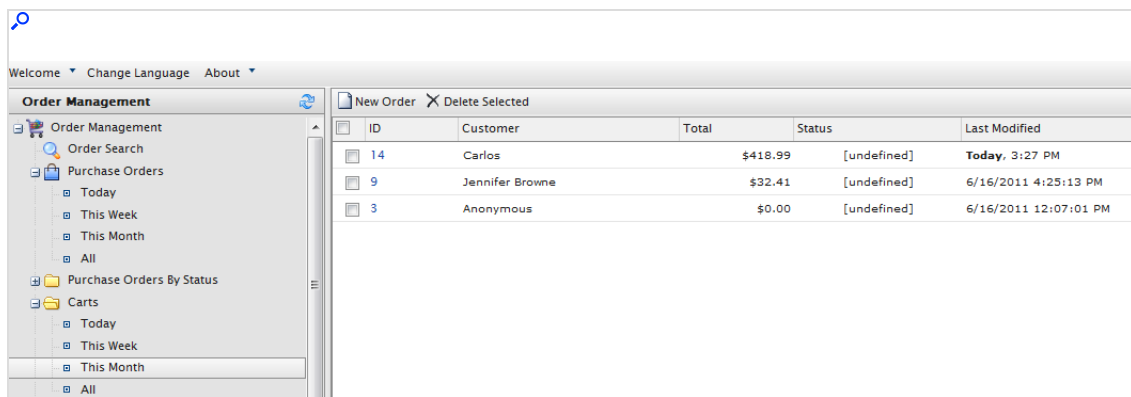


3. Select a customer for whom you want to create the cart. If you do not see the customer in the list, click **More** to search for them.
4. Enter product items to the cart by clicking **New Line Item**.
5. Return to the **Carts** view to verify that the cart is there.

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.



The screenshot shows the 'Order Management' interface. On the left is a navigation tree with 'Carts' selected. The main area displays a table of shopping carts with columns for ID, Customer, Total, Status, and Last Modified.

ID	Customer	Total	Status	Last Modified
14	Carlos	\$418.99	[undefined]	Today, 3:27 PM
9	Jennifer Browne	\$32.41	[undefined]	6/16/2011 4:25:13 PM
3	Anonymous	\$0.00	[undefined]	6/16/2011 12:07:01 PM

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.

More Actions

Overview

[Edit Currency](#)

[Edit Market](#)

Cart #: 1015

Created Date: 1/10/2017 2:35:02 AM

Order Level Discounts: \$0.00

Cart Total: \$26.00

Currency: USD

Market: US

Customer: admin

Customer ID: 8d21c87d-7515-4ee6-b714-3a1b520c5bd0 [Open Customer Profile](#)

Email Address:

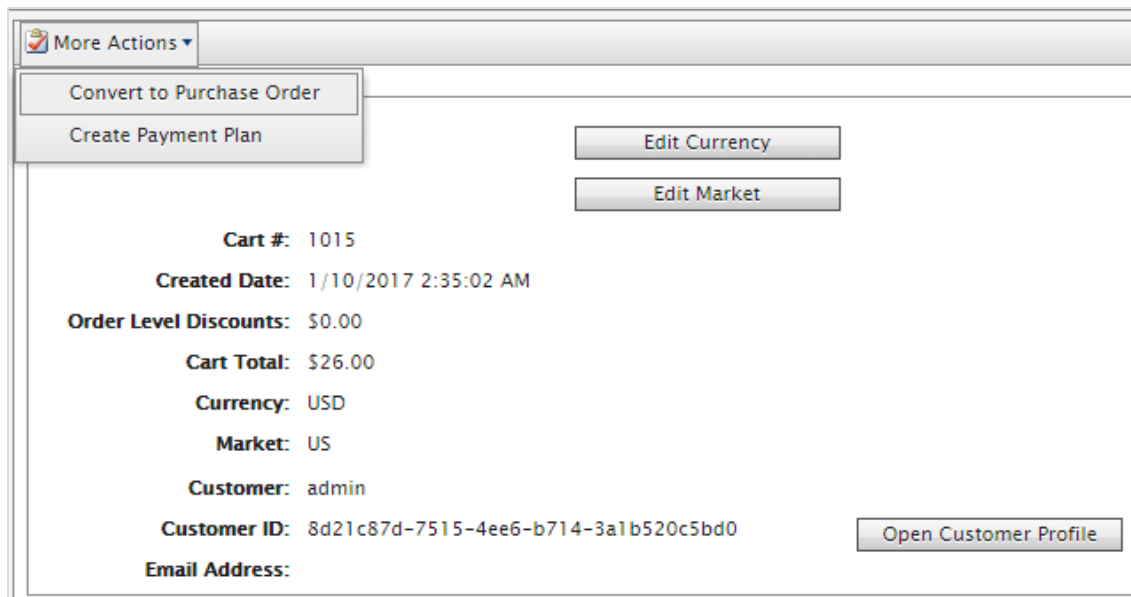
Line Items | **Notes**

[New Line Item](#) | [Delete](#)

	ID	Name	Quantity	List Price	Placed Price	Total Discount	Discount Description	Total
<input type="checkbox"/>	SKU-40797426	Tank Maxi Dress	1.00	\$12.00	\$12.00	\$0.00		\$12.00
<input type="checkbox"/>	SKU-40707713	Belted Striped Maxi Dress	1.00	\$14.00	\$14.00	\$0.00		\$14.00

Page Size: 100

- **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

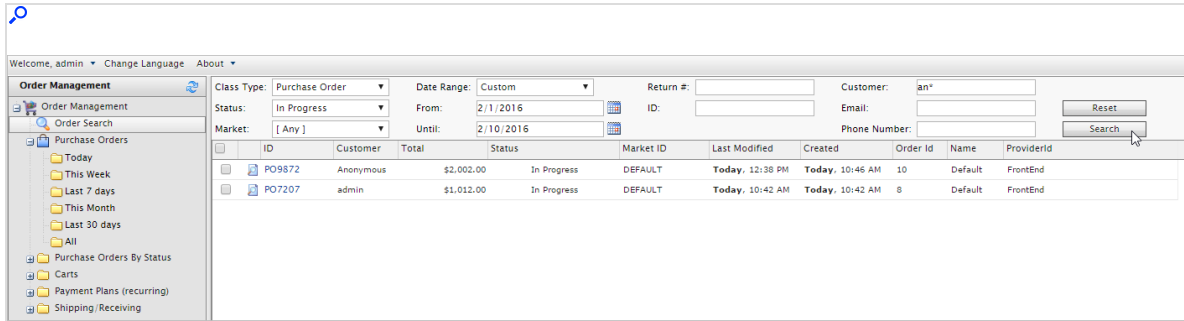
Customers create the majority of orders on the front-end in a web shop, and you likely have a significant amount of orders in your system. Optimizely Commerce lets you browse and search orders in several ways.

- 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**.

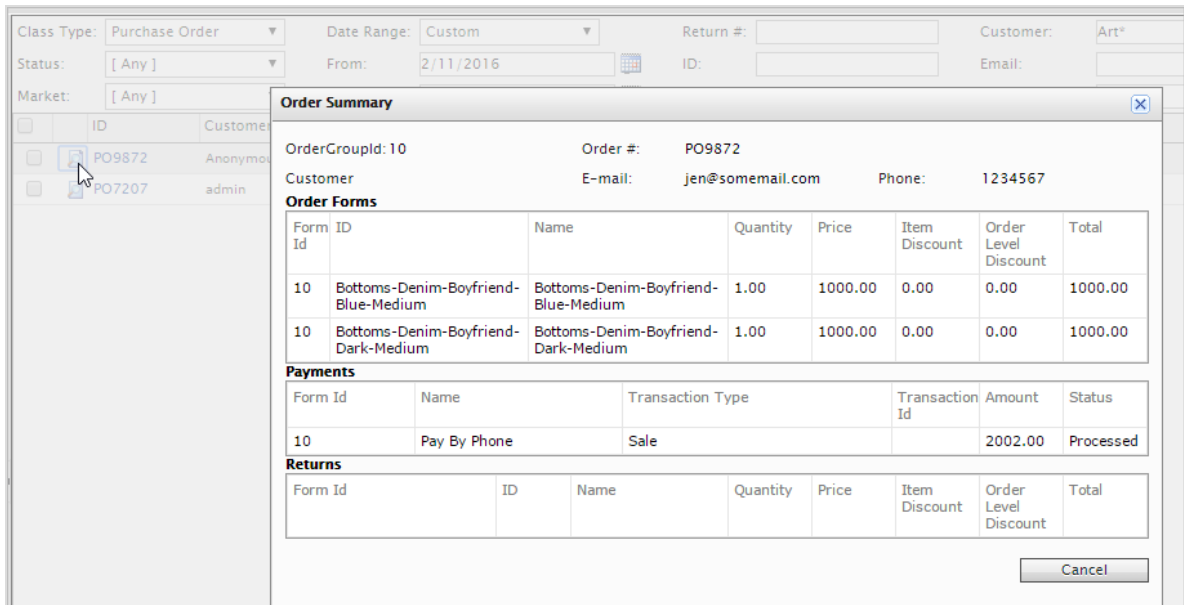
Search filtering options include markets and customer contact details. You can use wildcards ("*") to indicate partial search such as for a customer name. You can click column headers to sort the order list.



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.

ID	Customer	Total	Status	Created	Last Modified	Market
PO4126		kr 1 790,00	In Progress	Today, 9:16 AM	Today, 9:16 AM	NORWAY
PO4120754		kr 920,00	In Progress	Yesterday, 11:48 AM	Yesterday, 11:48 AM	NORWAY
PO4101550		kr 483,00	In Progress	2/11/2015 11:00:00 AM	2/11/2015 11:00:00 AM	NORWAY
PO4079766		\$364,00	In Progress	2/11/2015 7:39:00 AM	2/11/2015 7:39:00 AM	DEFAULT
PO4059581		kr 250,00	In Progress	2/11/2015 7:51:00 PM	2/11/2015 7:51:00 PM	NORWAY
PO3196201		\$1,850,00	In Progress	2/13/2015 9:58:00 AM	2/13/2015 9:58:00 AM	DEFAULT
PO4048909		kr 1 706,00	In Progress	2/10/2015 12:53:00 PM	2/10/2015 12:53:00 PM	NORWAY
PO4043796		\$934,00	In Progress	2/11/2015 5:28:00 AM	2/11/2015 5:28:00 AM	DEFAULT
PO4036737		kr 483,00	In Progress	2/11/2015 4:02:00 PM	2/11/2015 4:02:00 PM	NORWAY
PO4014970		\$1,382,00	In Progress	2/10/2015 9:00:00 AM	2/10/2015 9:00:00 AM	DEFAULT
PO4010406		483,00 kr	In Progress	2/13/2015 10:39:00 PM	2/13/2015 10:39:00 PM	SWEDEN
PO3997202		1.292,00 kr	In Progress	Yesterday, 7:11 PM	Yesterday, 7:11 PM	SWEDEN
PO3992218		798,00 kr	Completed	1/28/2015 3:10:00 AM	Today, 8:01 AM	SWEDEN
PO3990825		kr 379,00	Completed	2/9/2015 8:00:00 PM	Today, 1:00 AM	NORWAY
PO3988603		kr 1 128,00	Completed	1/25/2015 1:23:00 PM	Today, 1:00 AM	NORWAY
PO3985910		385,00 kr	Completed	2/9/2015 11:39:00 PM	Today, 1:00 AM	SWEDEN
PO3983687		kr 483,00	Completed	1/14/2015 3:44:00 AM	Today, 1:00 AM	NORWAY
PO3980142		122,00 kr	Completed	1/17/2015 11:49:00 AM	Today, 1:00 AM	SWEDEN
PO3978975		kr 1 732,00	Completed	1/23/2015 2:13:00 AM	Today, 1:00 AM	NORWAY
PO3976978		kr 1 003,00	Completed	1/13/2015 2:19:00 PM	Today, 1:00 AM	NORWAY

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.

ID	Customer	Total	Status	Market ID	Last Modified	Created	Order ID	Name	Provider ID
12	admin	0,00 €	In Progress	EUROPE	Today, 1:06 PM	Today, 1:06 PM	12	Default	
11	Anonymous	3 100,80 €	In Progress	EUROPE	Today, 10:50 AM	Today, 10:47 AM	11	Default	FrontEnd

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.

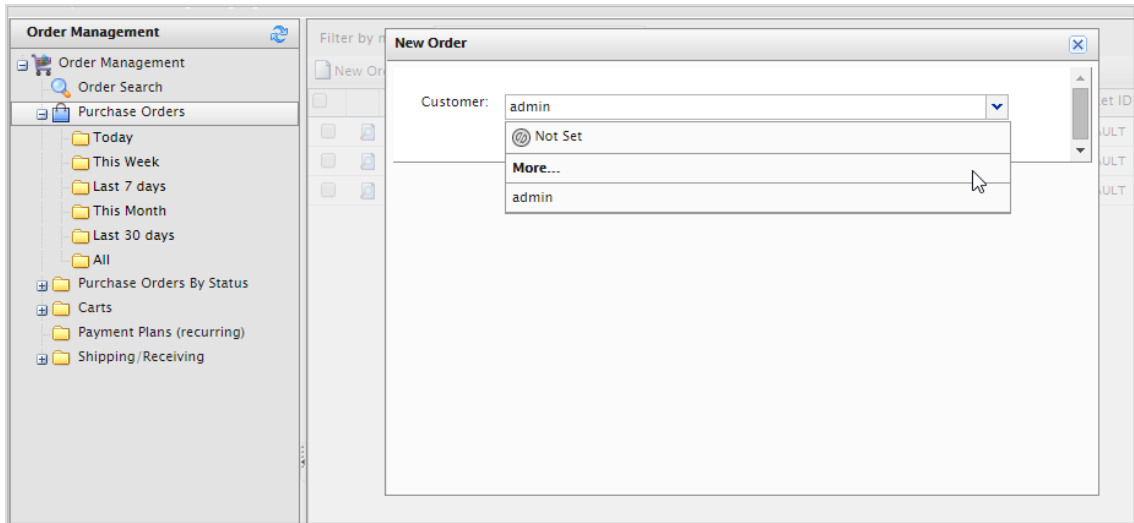
You can create orders from within **Order Management** or directly for a **Contact** in [Customer Management](#). The order management option is faster and more common, providing

more order alternatives. The Customer Management system, while a bit slower, lets you double-check a customer's information before beginning an order.

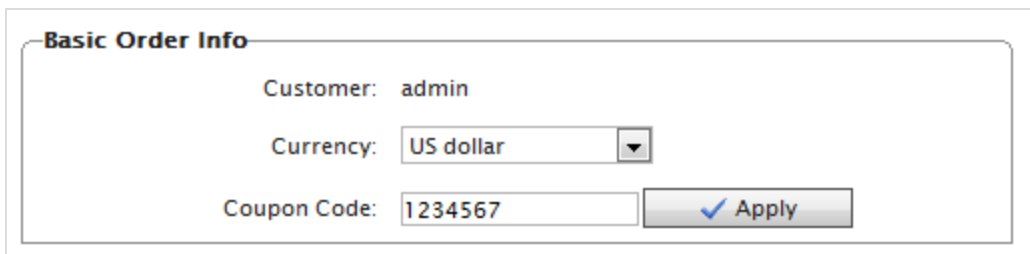
Note: When you create an order, it appears in the **Purchase Orders** list with an order status of **In Progress**.

Creating an order from order list

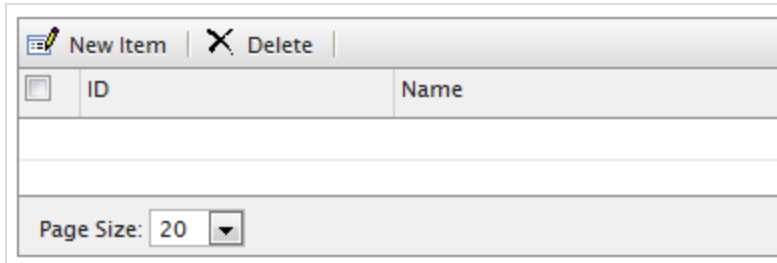
1. Go to **Order Management > Purchase Orders**.
2. Click **New Order**. A dialog box appears.
3. Select the **Site** and **Customer** to which the new order applies. Select **Customer > More** if your customer is not listed.



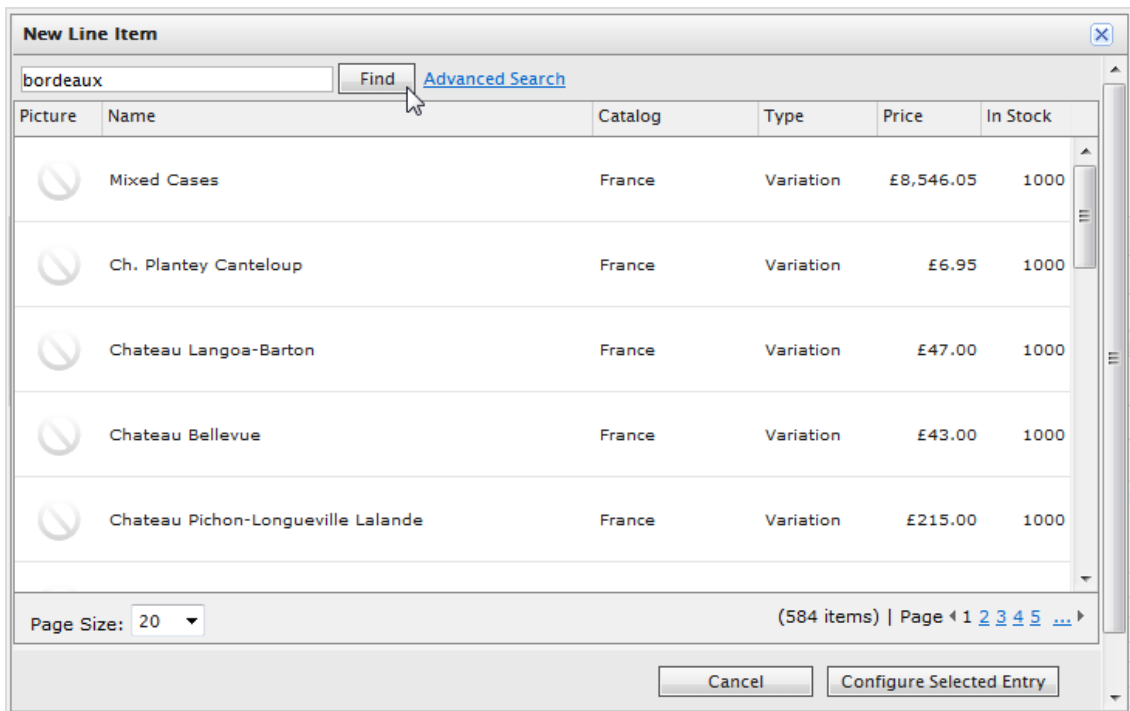
4. Click **OK**. The basic order information appears.
5. Fill out the purchase order and click **Apply**.



- **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.

ID	Name	Quantity	List Price	Total	Discount
ELCB000SOVTF56	Nextware iPhone Screen Protector 2-pk.	1	\$19.99	\$19.99	\$0.00

Page Size: 20 (1 items)

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

Billing Address

Address:

Name:

First Name:

Last Name:

Line 1:

Line 2:

City:

Country Name:

State:

Postal Code:

Day Phone:

Evening Phone:

Email:

Add to customer's address book

Shipping Address

Address:

Same as Billing Address

Name:

First Name:

Last Name:

Line 1:

Line 2:

City:

Country Name:

State:

Postal Code:

Day Phone:

Evening Phone:

Email:

Add to customer's address book

- 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.

Shipment Details

Shipping method: Fixed Shipping Rate

Summary

Item Subtotal:	\$19.99
Shipping Cost:	\$10.00
Less Shipment Discount:	\$0.00
<hr/>	
Total Before Tax:	\$19.99
Item Taxes:	\$0.00
Shipment Total:	\$29.99

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.

The screenshot shows a 'New Order' dialog box with the following fields and values:

Contact Information		Account Information	
Full Name:	admin	User Name:	admin
First Name:	admin	Description:	
Middle Name:		Email:	admin@yourcompany.com
Last Name:		Is Locked Out:	none
Parent Organization:		Last Activity:	Today, 1:23 PM
Preferred Shipping Address:		Last Login:	Today, 12:49 PM
Preferred Billing Address:		Last Password Changed:	Today, 6:19 AM

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**.

Add Note Send Notifications Add Order Address

Order No: PO0850 **Customer:** Mary Smith
Order Total: \$59.98 **Status:** InProgress

Summary Details **Payments** Returns Notes

Create Payment

<input type="checkbox"/>	Name	Transaction Type	Amount	Status
<input type="checkbox"/>				

Page Size: 100

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.

The Order is in Edit Mode. Save changes before exiting. Save Cancel

Add Note Send Notifications Add Order Address

Order No: PO2427 **Customer:** Mary Smith
Order Total: £86.00 **Status:** InProgress

Summary Details **Payments** Returns Notes

Create Payment

<input type="checkbox"/>	Name	Transaction Type	Amount	Status
<input checked="" type="checkbox"/>	Pay By Phone		86.00	Pending

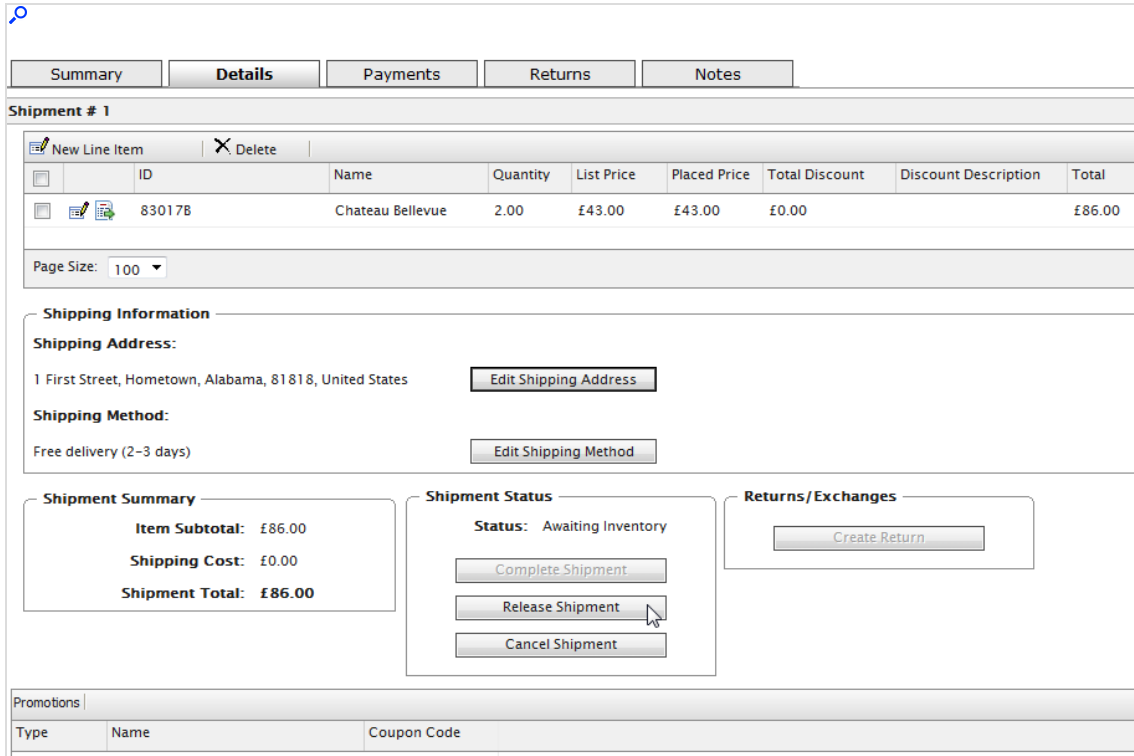
Page Size: 100

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.

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

Add Note Send Notifications Add Order Address				
Order No: PO0850		Customer: Mary Smith		
Order Total: \$59.98		Status: InProgress		
Summary	Details	Payments	Returns	Notes
<input type="checkbox"/>	Name	Transaction Type	Amount	Status
<input type="checkbox"/>	Pay By Phone	Sale	59.9800	Processed
Page Size: 100 ▼				

- 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.



- 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.

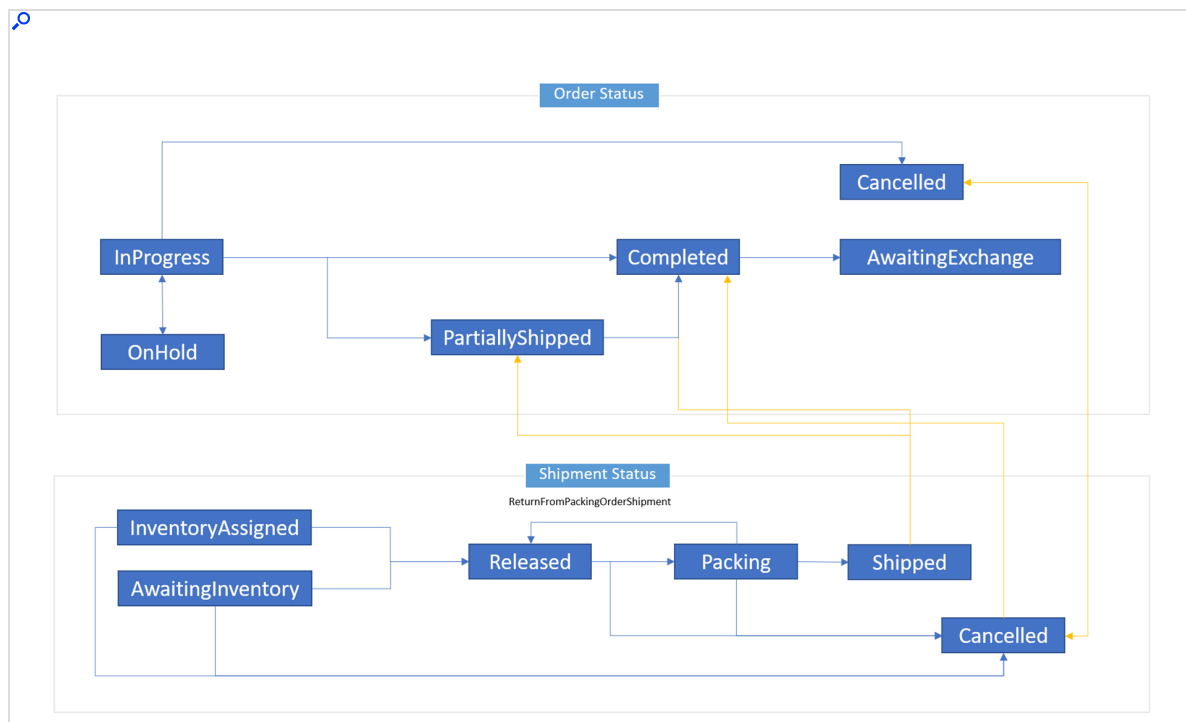
Shipment, order and return statuses

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	<ul style="list-style-type: none"> If the order 	In progress	

Event	Shipment status	Order status	Return status
	<p>quantity of any item in an order exceeds the available Instock Quantity, its shipment status is set to Awaiting Inventory.</p> <ul style="list-style-type: none"> 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

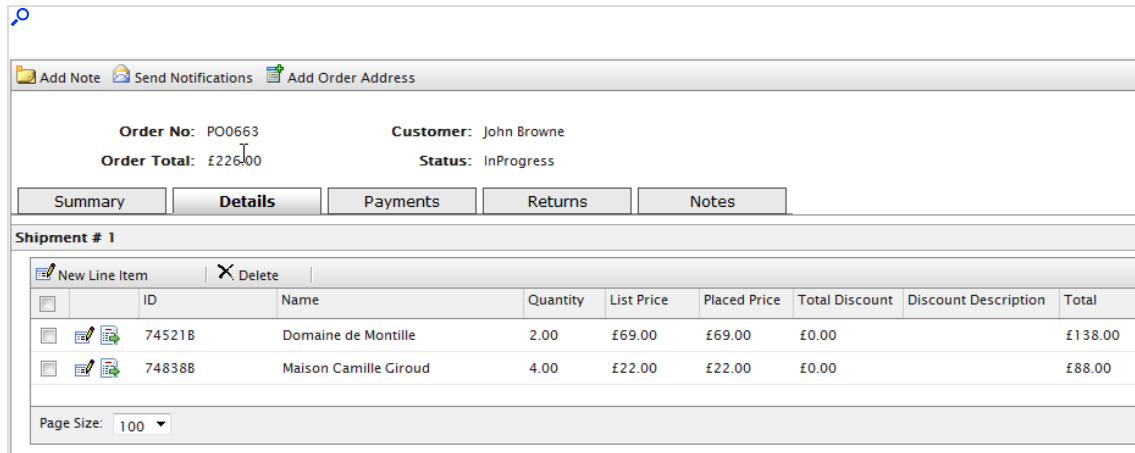


Splitting a shipment

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**.



Order No: PO0663 Customer: John Browne
 Order Total: £226.00 Status: InProgress

Summary **Details** Payments Returns Notes

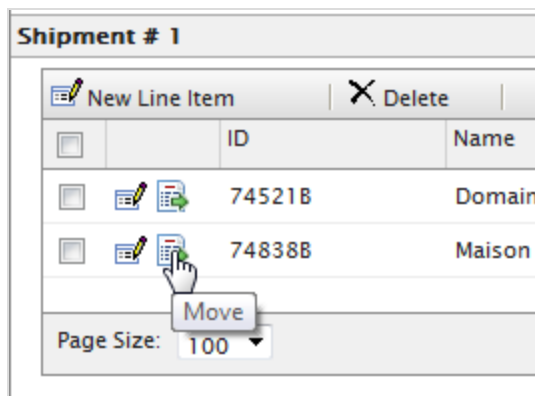
Shipment # 1

New Line Item Delete

ID	Name	Quantity	List Price	Placed Price	Total Discount	Discount Description	Total
74521B	Domaine de Montille	2.00	£69.00	£69.00	£0.00		£138.00
74838B	Maison Camille Giroud	4.00	£22.00	£22.00	£0.00		£88.00

Page Size: 100

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



Shipment # 1

New Line Item Delete

ID	Name
74521B	Domain
74838B	Maison

Page Size: 100

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.

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
74521B	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

Shipping Method:
 Free delivery (2-3 days)

Shipment Summary

Item Subtotal: £138.00
 Shipping Cost: £0.00
 Shipment Total: **£138.00**

Shipment Status

Status: Inventory Assigned

Returns/Exchanges

Shipment # 2

New Line Item Delete

ID	Name	Quantity	List Price	Placed Price	Total Discount	Discount Description	Total
74838B	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

Shipping Method:
 Free delivery (2-3 days)

Shipment Summary

Item Subtotal: £88.00
 Shipping Cost: £0.00
 Shipment Total: **£88.00**

Shipment Status

Status: Inventory Assigned

Returns/Exchanges

Setting up a payment plan

A subscription allows for recurring orders, and for payments to be spread over time, providing flexibility in how you sell your products. Use subscriptions 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 subscription to generate recurring payments. Subscription processing is handled through the Subscription payment plans 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**.


Payment Plan Details


Plan Cycle (en-US): ▼
Cycles mode is used to define period for recurring payments. Can be day, week, month, year or custom.

Cycle Length (en-US):
Cycle length in units of cycle mode.


Max Cycles (en-US):
Number of maximum cycles to process

Completed Cycles (en-US):
Number of completed cycles

Start Date (en-US): 
Plan start date

End Date (en-US): 
Plan end date

Is Plan Active (en-US): True False
Set to true if plan is active

Last Transaction Date (en-US): 
The date of last transaction

- **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

Optimizely 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.

Class Name:	Mediachase.Commerce.Plugins.Payment.Authorize.AuthorizePaymentGateway ▼
-------------	---

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.

Overview

Parameters

Configure Authorize.Net Account
Get an Authorize.Net account at www.authorizenet.com.

API UserId:

Transaction Key:

Regular Payments

Processing Url:

Payment Options:

Authorization

Sale

Recurring Payments

Processing Url:

Recurring Method:

Cancel Status:

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.

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

Order No: P00850		Customer: Mary Smith		
Order Total: \$59.98		Status: Cancelled		
Summary	Details	Payments	Returns	Notes
New Item				
<input type="checkbox"/>		Originated By	Date/Time	Note Text
<input type="checkbox"/>	5	admin	2/21/2011 9:49:43 AM	New order placed by admin in ConsoleManager
<input type="checkbox"/>	6	admin	2/21/2011 10:01:16 AM	New Other payment in the amount of \$59.98 added to order
<input type="checkbox"/>	7	admin	2/21/2011 10:08:10 AM	Shipment 10 status changes to Released
<input type="checkbox"/>	8	admin	2/21/2011 10:11:21 AM	Order status changed to Cancelled
Page Size: 100				

Deleting an order

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

- Go to **Order Management**.
- Select one or more orders to delete.
- Click **Delete Selected**.
- Click **OK**.

Shipping and receiving

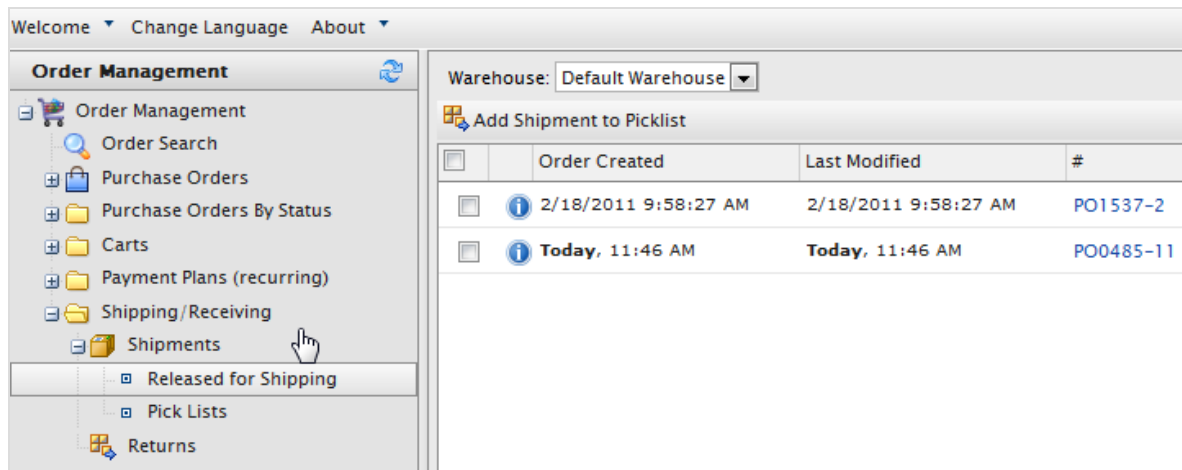
Completing the order processing includes these tasks:

- [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. Optimizely processes returns similarly 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.

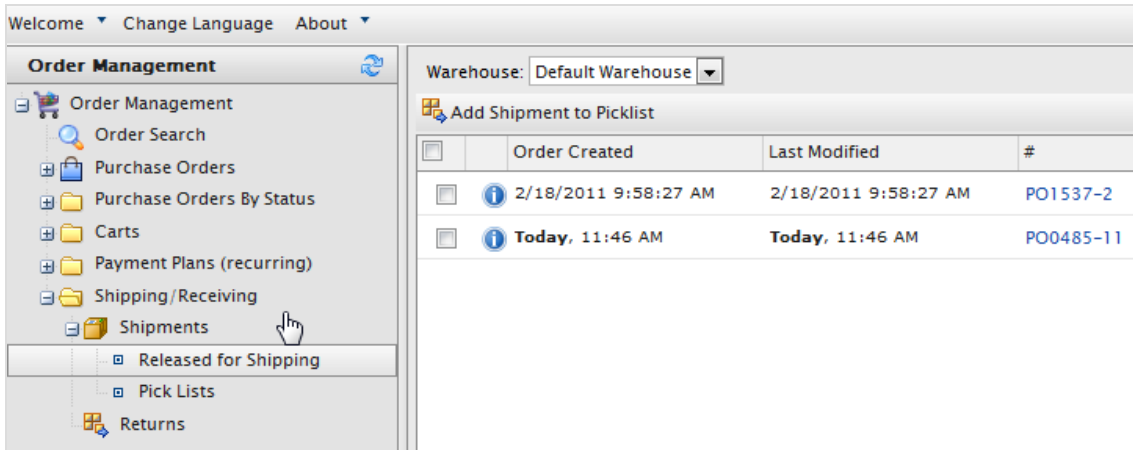
You can change the **Default Warehouse** in the Administration section of the Commerce Manager. If you have only digital products, the default warehouse is adequate.

Creating a picklist

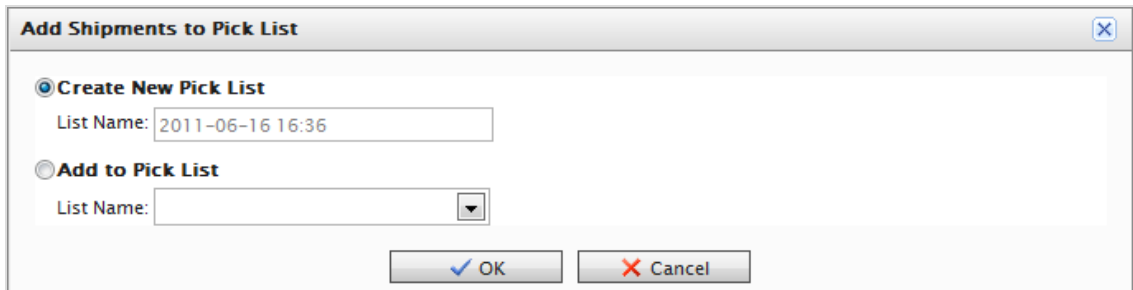
After you create and process an order, its status is **Released for Shipping**. Before you can complete or ship an order, you must add it to an existing picklist or create a new picklist. After adding a shipment to a picklist, you select the warehouse where the physical item is packed and shipped.

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.

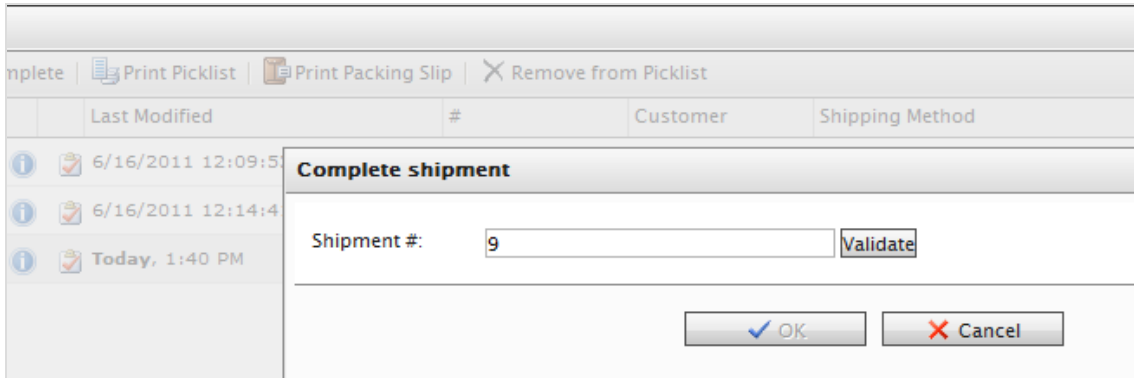
Use the following methods to complete a shipment.

Method 1

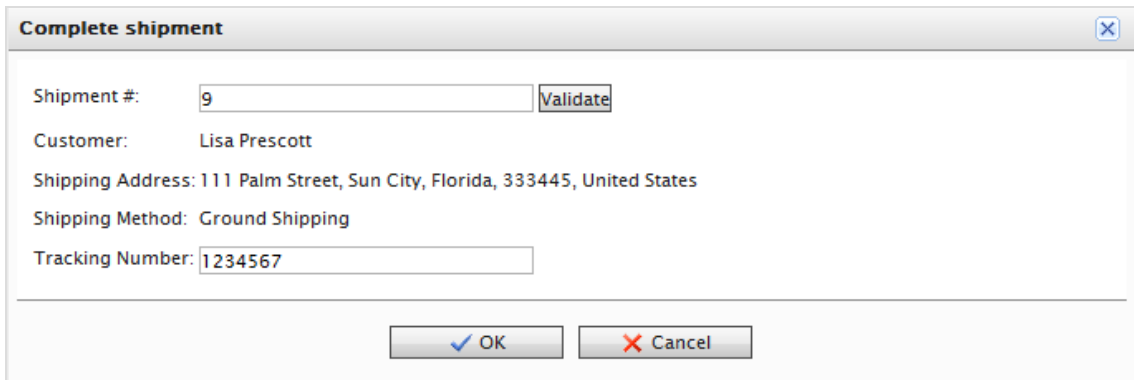
1. Select the box next to the shipment then click **Complete**. The **Complete shipment** dialog box appears.

<input type="checkbox"/> Complete <input type="checkbox"/> Print Picklist <input type="checkbox"/> Print Packing Slip <input type="checkbox"/> Remove from Picklist					
<input type="checkbox"/>		Last Modified	#	Customer	Shipping Method
<input type="checkbox"/>		6/16/2011 12:09:53 PM	PO4563-4	Carlos Nevada	Fixed Shipping Rate
<input type="checkbox"/>		6/16/2011 12:14:41 PM	PO6908-6	Jennifer Browne	Fixed Shipping Rate
<input checked="" type="checkbox"/>		Today, 1:40 PM	PO10728-9	Lisa Prescott	Ground Shipping

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.

Complete shipment ✕

Shipment #: 6

Customer: Jennifer Browne

Shipping Address: 75 Sun Street, Sunshine Valley, South Wales, 333567, Australia

Shipping Method: Fixed Shipping Rate

Tracking 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**.

Warehouse:

Add Shipment to Picklist

<input type="checkbox"/>	Order Created	Last Modified	#
<input type="checkbox"/>	2/18/2011 9:58:27 AM	2/18/2011 9:58:27 AM	PO1537-2
<input type="checkbox"/>	Today, 11:46 AM	Today, 11:46 AM	PO0485-11

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.

Shipment Id: 6			
Customer Name	Product Code	Product Name	Qty
Mary Smith	83017B	Chateau Bellevue	2.00

Shipment Id: 9			
Customer Name	Product Code	Product Name	Qty
John Browne	74521B	Domaine de Montille	2.00

- 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

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

Deleting picklists

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

- Go to **Order Management > Shipping/Receiving > Shipments > Picklists**.
- Select one or more picklists.
- Click **Delete Selected**.
- 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**.

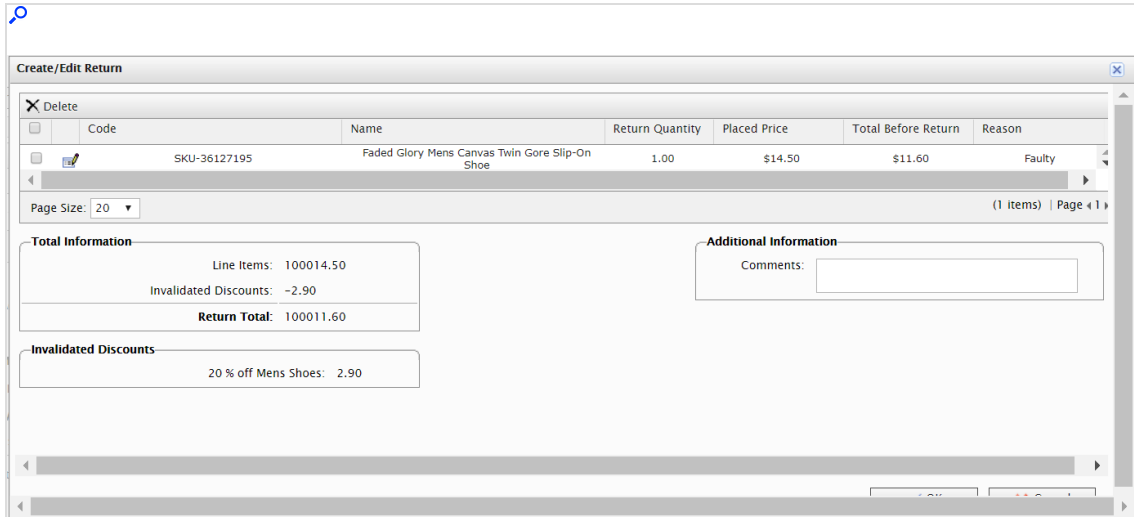
Initiating a return

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.

The screenshot displays three panels from an order management system:

- Shipment Summary:**
 - Item Subtotal: £86.00
 - Shipping Cost: £0.00
 - Shipment Total: £86.00
- Shipment Status:**
 - Status: Shipped
 - Buttons: Complete Shipment, Release Shipment, Cancel Shipment
- Returns/Exchanges:**
 - Button: Create Return

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**.

New Order New Payment Plan Delete Selected					
ID	Customer	Total	Status	Last Modified	
PO0663	John Browne	£226.00	Partially Shipped	Today, 11:34 AM	
PO10564	Carlos Santana	£1,290.00	In Progress	Today, 11:30 AM	
PO0791	Carlos Santana	\$180.85	In Progress	Today, 10:27 AM	
PO2427	Mary Smith	£86.00	Completed <i>(Awaiting Return Completion)</i>	Today, 10:23 AM	

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.)

Get Help For This Page

Add Note Send Notifications Add Order Address

Order No: PO2427 Customer: Mary Smith
 Order Total: £86.00 Status: Completed

Summary Details Payments **Returns** Notes

Return # RMA8980

Date/Time Initiated: Today, 12:50 PM Notes: Strange taste in batch 12345.
 Created By: admin
 Status: Awaiting Stock Return
 Return Total: £86.00

Returns Actions

Edit Return
 Cancel Return
 Complete Return
 Acknowledge Receipt Items

Exchange Actions

View Exchange
 Create Exchange

ID	Name	Quantity	List Price	Total	Reason
83017B	Chateau Bellevue	2.00	43.00	86.0000	Faulty

Page Size: 100

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

Returns actions

Edit Return
 Cancel Return
Complete Return
 Acknowledge Receipt Items

Ex

Create Refund

Amount: 86.0000

Existing Payments

Pay By Phone (Sale) - £86.00
 New Credit

Payment Method: Pay By Phone

OK Cancel

- **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**.

The screenshot displays the 'Returns' tab for a specific return order. At the top, it shows order details: Order No: PO2427, Customer: Mary Smith, Order Total: £86.00, and Status: Completed. Below this are navigation tabs for Summary, Details, Payments, Returns (which is active), and Notes. The main section is titled 'Return # RMA8980' and contains the following information:

- Date/Time Initiated:** Today, 12:50 PM
- Created By:** admin
- Status:** Complete
- Return Total:** £86.00
- Notes:** Strange taste in batch 12345.

There are two action panels on the right:

- Returns Actions:** Edit Return, Cancel Return, Complete Return, Acknowledge Receipt Items.
- Exchange Actions:** View Exchange, Create Exchange.

At the bottom, there is a table listing the items being returned:

ID	Name	Quantity	List Price	Total	Reason
830178	Chateau Bellevue	2.00	43.00	86.0000	Faulty

Below the table, there is a 'Page Size' dropdown menu set to 100.

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**.

The screenshot shows a 'Create Exchange Order' window with a 'New Line Item' search interface. The search results are displayed in a table with the following columns: Picture, Name, Catalog, Type, Price, and In Stock. The table contains five entries, all from France and categorized as 'Variation'. The entry 'Domaine Sylvie Esmonin' is highlighted, and a mouse cursor is pointing at the 'Configure Selected Entry' button at the bottom right of the search results area.

Picture	Name	Catalog	Type	Price	In Stock
	Chandon de Briailles	France	Variation	£55.00	1000
	Louis Jadot	France	Variation	£125.00	1000
	Dujac Fils & Pere	France	Variation	£36.60	1000
	Domaine Sylvie Esmonin	France	Variation	£72.00	1000
	Maison Joseph Drouhin	France	Variation	£165.00	1000

Page Size: 20 (2779 items) | Page 1 2 3 4 5 ...

Buttons: Cancel, 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**.

The Order is in Edit Mode. Save changes before exiting.

Order No: EO0335 **Customer:** Carlos Santana **Original Order:** PO0791

Order Total: £72.00 **Status:** AwaitingExchange

Summary Details **Payments** Returns Notes

Create Payment

<input type="checkbox"/>	Name	Transaction Type	Amount	Status
<input checked="" type="checkbox"/>	Pay By Phone		72.00	Pending

Page Size: 100 ▾

- 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**.

<input type="checkbox"/>	ID	Customer	Total	Status	Last Modified
<input checked="" type="checkbox"/>	EO0335	Carlos Santana	£72.00	Awaiting Exchange	Today, 1:22 PM
<input type="checkbox"/>	PO0663	John Browne	£226.00	Partially Shipped	Today, 11:34 AM
<input type="checkbox"/>	PO10564	Carlos Santana	£1,290.00	In Progress	Today, 11:30 AM
<input type="checkbox"/>	PO0791	Carlos Santana	\$180.85	Completed (Awaiting Stock Return)	Today, 10:27 AM
<input type="checkbox"/>	PO2427	Mary Smith	£86.00	Completed	Today, 10:23 AM

- Go to the original purchase order and click the **Returns** tab.
- 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 Optimizely 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 Optimizely 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

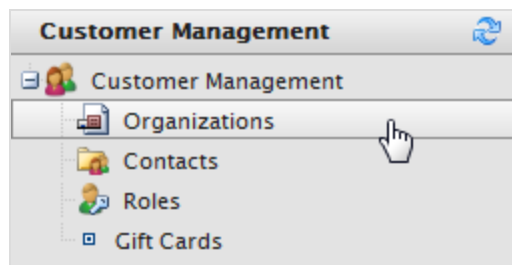
Under **Organizations**, you can create new organizations. Categorize organizations into different types, such as *regional branches* and *departments*, and also business categories, such as *Computer and Electronics* or *Clothing and Accessories*.

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.

Name	Description	Type	Organization Customer Group	Business Category
Electronics Inc	Main electronics distributor	Organization Unit	Partner	Computers & Electronics
Global Electronics	Global appliances services	Organization Unit	Customer	Computers & Electronics
Nordic Electronics				

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.

Name: Company X **Parent:**

Information

- Information
- Contacts
- Organizations
- Addresses
- Credit Cards

Organization

Name: Company X **Type:** Organization

Description: Company X Corporation **Business Category:** Computers & Electronics

Organization Customer Group: Partner

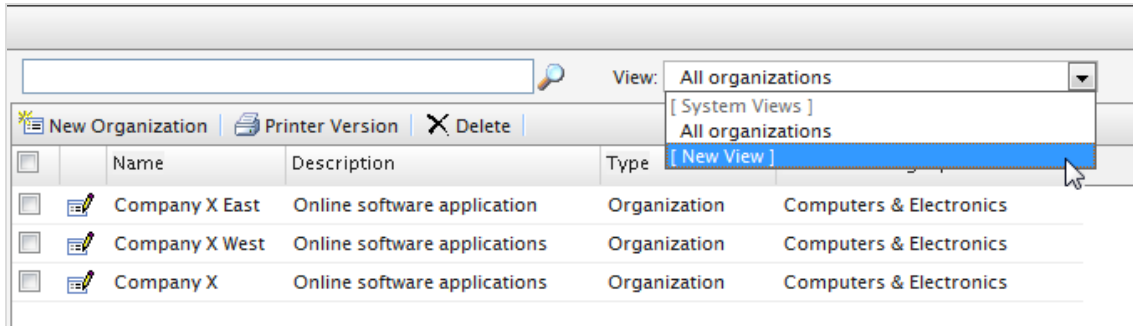
Searching for an organization

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

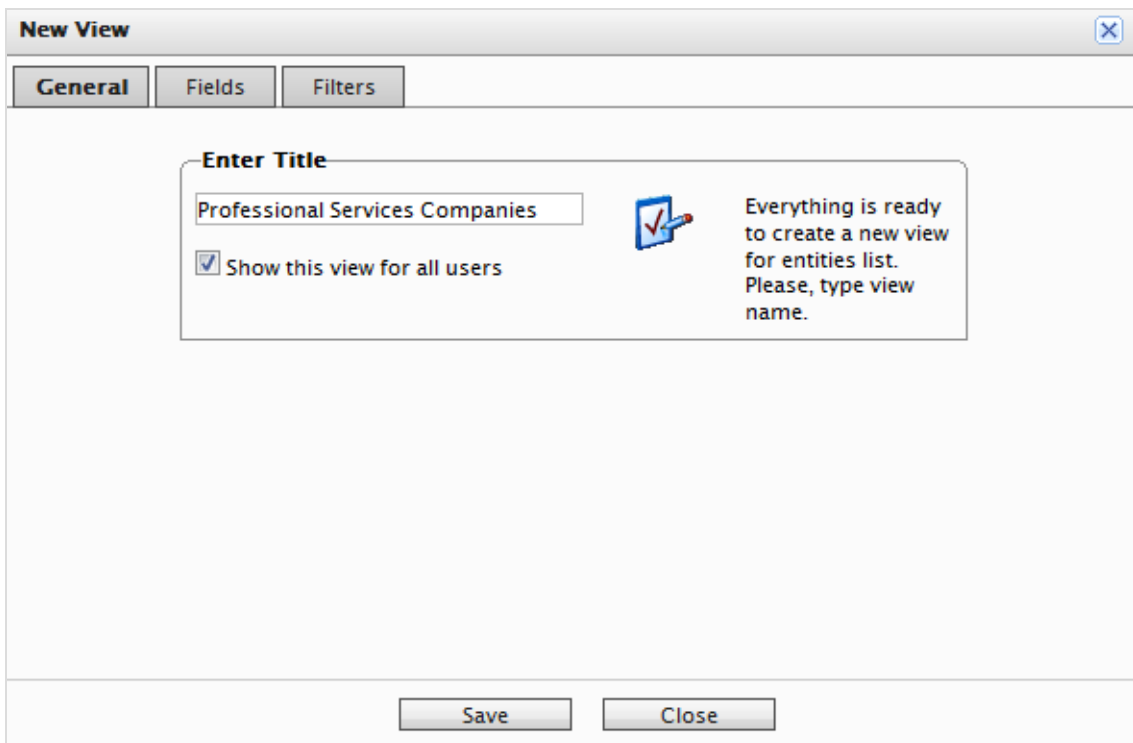
Customizing views for browsing organizations

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.

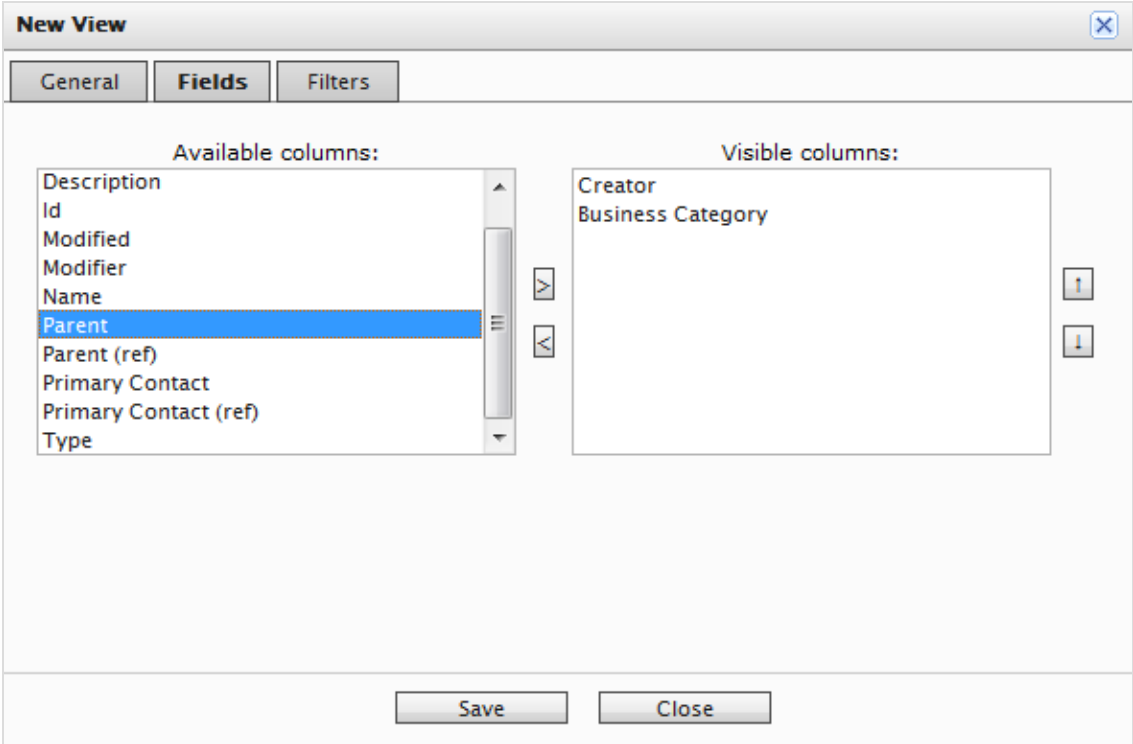
1. Select **View > [New View]**. The **New View** dialog box appears.



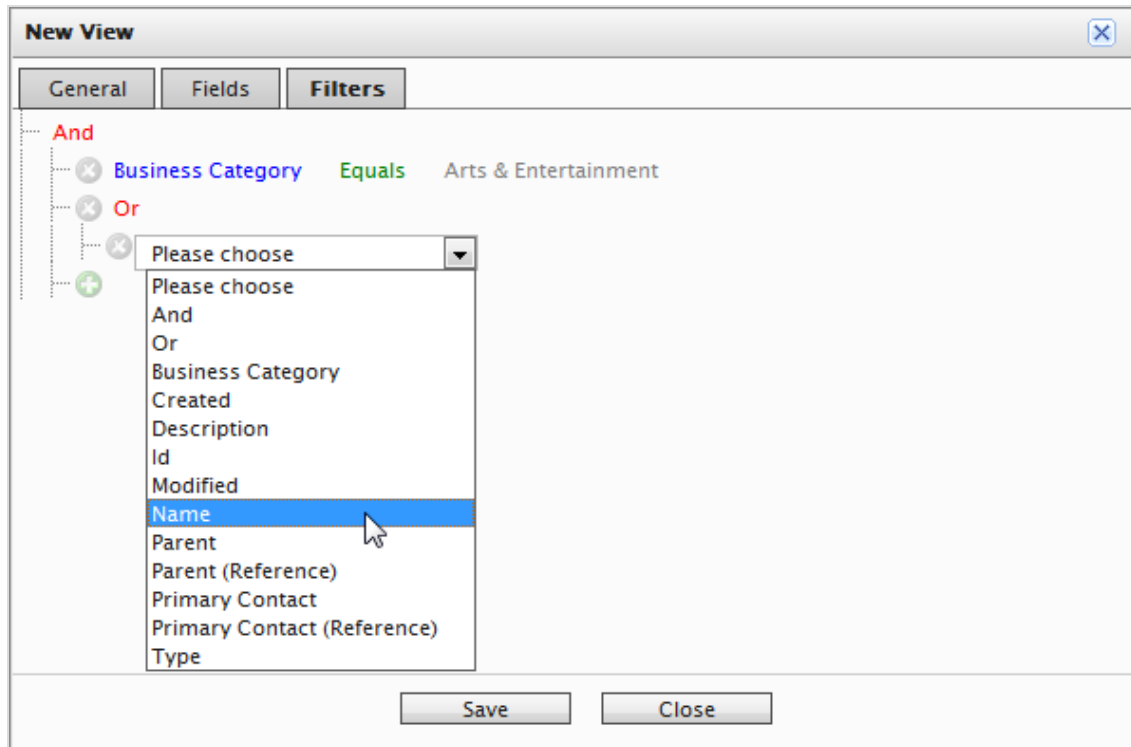
2. On the **General** tab, enter a **Title** for the custom view. Click **Show this view for all users** if you want other users to see this view.



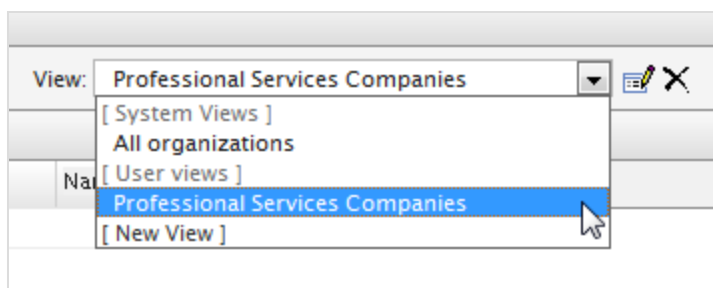
3. On the **Fields** tab, select columns to appear in the custom view. To do so, select an available column then click **Right Arrow** to move it to the **Visible columns** list. To deselect, select a visible column and click **Left Arrow**. To re-order the list, click **Up** and **Down** arrows.



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

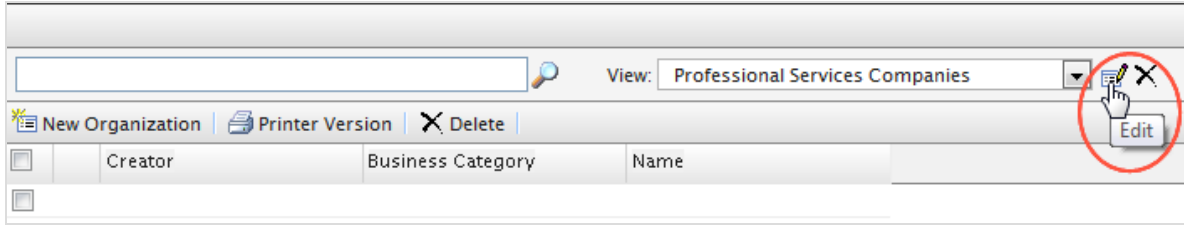


- Click **Save** to return to the **Organization List** screen. The new view appears in the **View** drop-down list.



Editing and deleting views

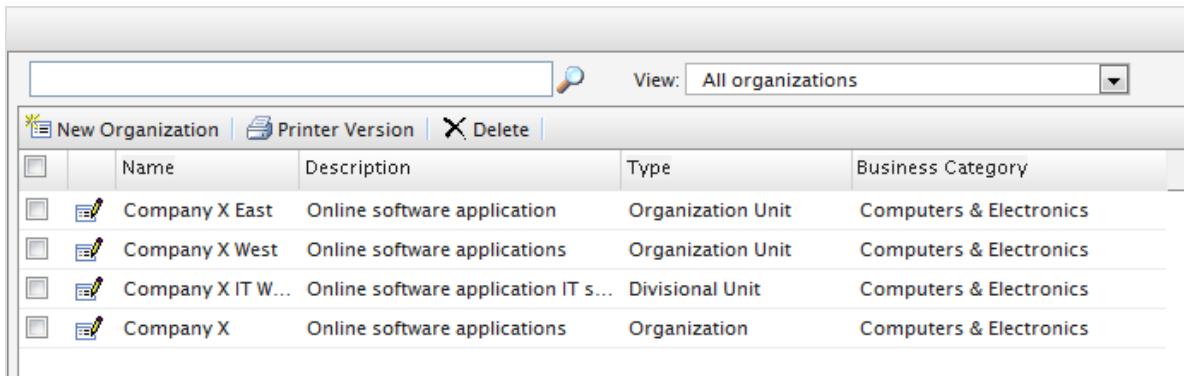
To edit an existing view, select it from the drop-down list and click **Edit**. The **View Editing** dialog box appears, and you can edit all properties.



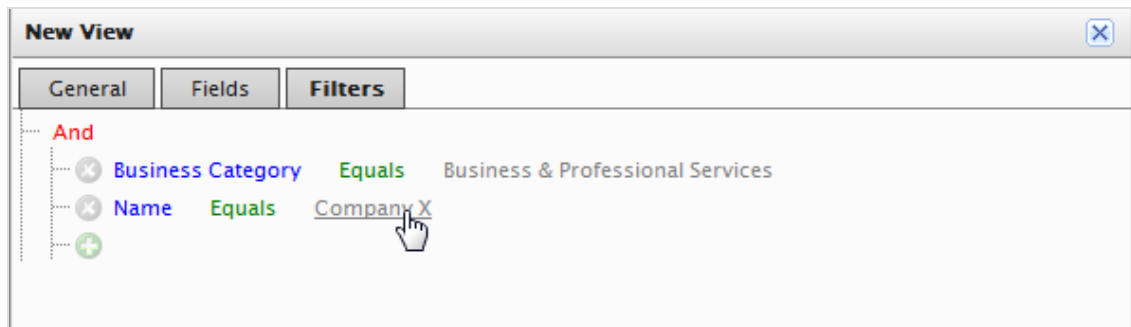
To **delete** a custom view, click **X**.

Customized view example

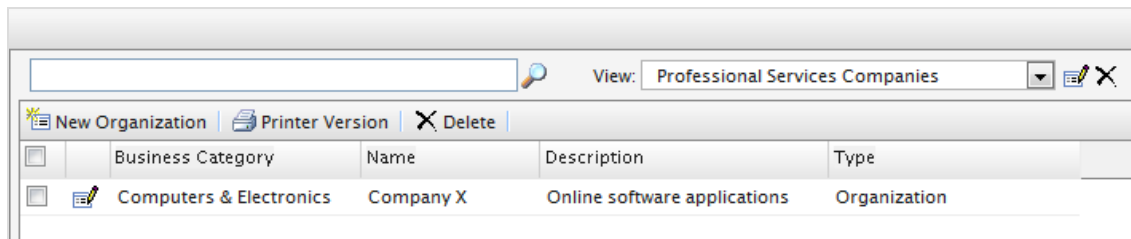
The following example creates a view that shows only organizations that match a business category and organization name. Create a filter condition that displays organizations with a **Business Category** that equals *Business & Professional Services*, and an **Organization Name** that equals *Company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

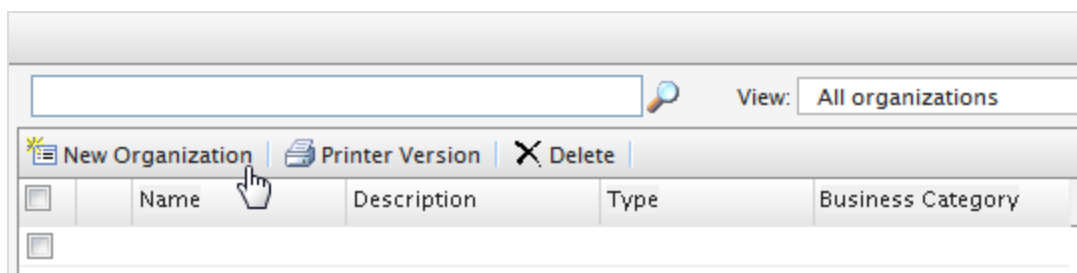


Printing a list of organizations

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.

The screenshot shows a dialog box titled "Organization Info" with a tabbed interface. The fields are as follows:

- Name:** Company X West
- Description:** Online software applications
- Type:** Organization (dropdown menu with a plus icon)
- Organization Customer Group:** [No value] (dropdown menu with a plus icon)
- Business Category:** Computers & Electronics (dropdown menu with a plus icon)
- Parent:** Not Set (dropdown menu with a plus icon)

At the bottom of the dialog are "OK" and "Cancel" buttons. Below the "Parent" dropdown, the text "Parent Organization" is visible.

- **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 Optimizely provides by default. Click **Edit** to edit the organization. Click **Organizations** to return to the organization List.

The screenshot shows a web interface for managing organizations. At the top, there is a header with 'Edit' and 'Organizations'. Below this, the 'Name' field is set to 'Company X West' and the 'Parent' field is set to 'Company X'. A sidebar on the left contains a menu with 'Information' selected, and other options like 'Contacts', 'Organizations', 'Addresses', and 'Credit Cards'. The main content area is titled 'Information' and contains a sub-section 'Organization' with the following details: 'Name: Company X West', 'Type: Organization', 'Description: Online software applications', and 'Business Category: Computers & Electronics'. There is also a field for 'Organization Customer Group' which is currently empty.

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...**

The screenshot shows the 'Overview' tab of the organization form. The fields are: 'Name: Company X West', 'Description: Online software applications', 'Type: Organization Unit', 'Business Category: Computers & Electronics', and 'Parent: Company X'. A dropdown menu is open for the 'Parent' field, showing options: 'Not Set', 'Company X' (highlighted), and 'More...'. At the bottom, there are 'OK' and 'Cancel' buttons.

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.

Name: Company X **Parent:**

Information

- Information
- Contacts
- Organizations
- Addresses
- Credit Cards

Organization

Name: Company X **Type:** Organization

Description: Company X Corporation **Business Category:** Computers & Electronics

Organization: Partner

Customer Group:

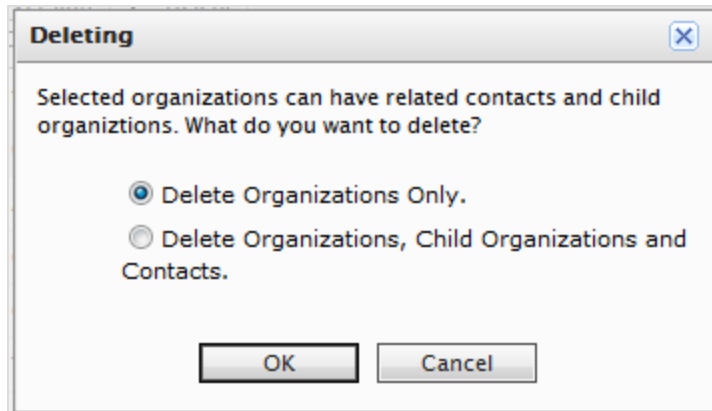
5. Repeat the above steps to create additional organization units for the parent organization.

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.

<input type="checkbox"/>	Name	Description	Type
<input type="checkbox"/>	Knudsen inc	temp	Organization
<input checked="" type="checkbox"/>	Company X West	Company X West	Organization Unit
<input type="checkbox"/>	Big Bank	A large bank with lots of VIP customers	Organization
<input type="checkbox"/>	Company X East	Company X East	Organization Unit
<input type="checkbox"/>	Company X	Company X	Organization
<input type="checkbox"/>	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 Optimizely.


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.

Name: Company X

Description: Company X Corporation

Type: Organization 





Organization Customer Group: Partner  Edit Dictionary

Business Category: Computers & Electronics 








Parent: Not Set
Parent Organization

OK Cancel

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**.

Manage List			 New Item	 Close
System Name: OrganizationType		Friendly Name: OrganizationType		Type: Single Value
Nº	Item Value	Display Value		
1	Organization	Organization		 
2	Organization Unit	Organization Unit		 

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.

Manage List			 New Item	 Close
System Name: OrganizationType		Friendly Name: OrganizationType		Type: Single Value
Nº	Item Value	Display Value		
1	Organization	Organization		 
2	Organization Unit	Organization Unit		 
3	Division			 

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

Optimizely 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.

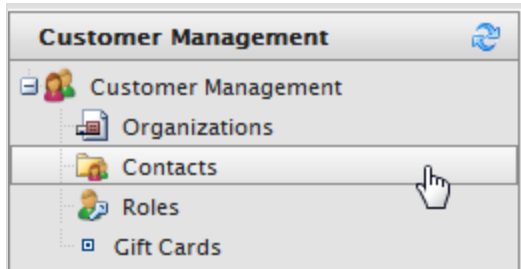
Contacts

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**.



View: All contacts

New Contact | Printer Version | Delete Selected

<input type="checkbox"/>	<u>FullName2</u>	<u>FirstName2</u>	<u>Last Name</u>	<u>Middle Name</u>
<input type="checkbox"/>	Receiving Manager	Receiving	Manager	
<input type="checkbox"/>	Order Manager	Order	Manager	
<input type="checkbox"/>	Jennifer Browne	Jennifer	Browne	
<input type="checkbox"/>	Mary Smith	Mary	Smith	
<input type="checkbox"/>	Shipping Manager	Shipping	Manager	
<input type="checkbox"/>	admin	admin		
<input type="checkbox"/>	Order Supervisor	Order	Supervisor	
<input type="checkbox"/>	Carlos Nevada	Carlos	Nevada	
<input type="checkbox"/>	Lisa Prescott	Lisa	Prescott	

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

The screenshot shows a web application window titled 'out' with a 'Get Help For This Page' link. The window contains a contact form for 'admin'. The form is divided into two main sections: 'Contact' and 'Account'. The 'Contact' section includes fields for Full Name, First Name, Middle Name, Last Name, Parent Organization, Preferred Shipping Address, and Preferred Billing Address. The 'Account' section includes fields for User Name, Description, Email, Is Locked Out, Last Activity, Last Login, and Last Password Changed. A sidebar on the left lists various categories like Information, Security, Orders, and Shopping Lists. At the bottom, there are 'Edit' and 'Cancel' buttons.

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.

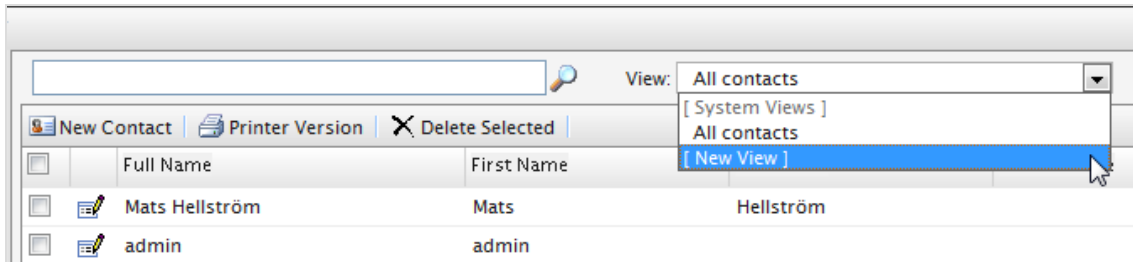
The screenshot shows a search interface with a search bar containing the text 'visitor'. Below the search bar are three buttons: 'New Contact', 'Printer Version', and 'Delete Selected'. A table below the buttons displays search results. The table has two columns: 'Full Name' and 'First Name'. The first row shows 'EPIserver Commerce Visitor' in the 'Full Name' column and 'Visitor' in the 'First Name' column. A hand cursor is pointing at the search bar.

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

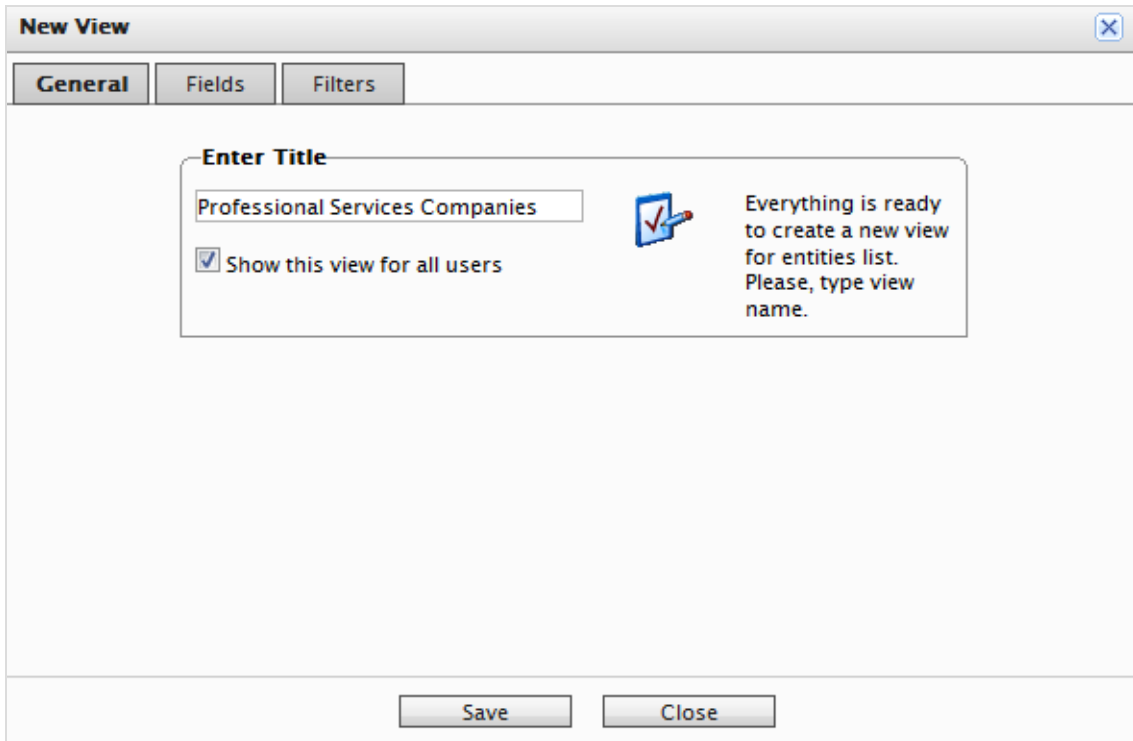
Customizing views for browsing contacts

As a 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.

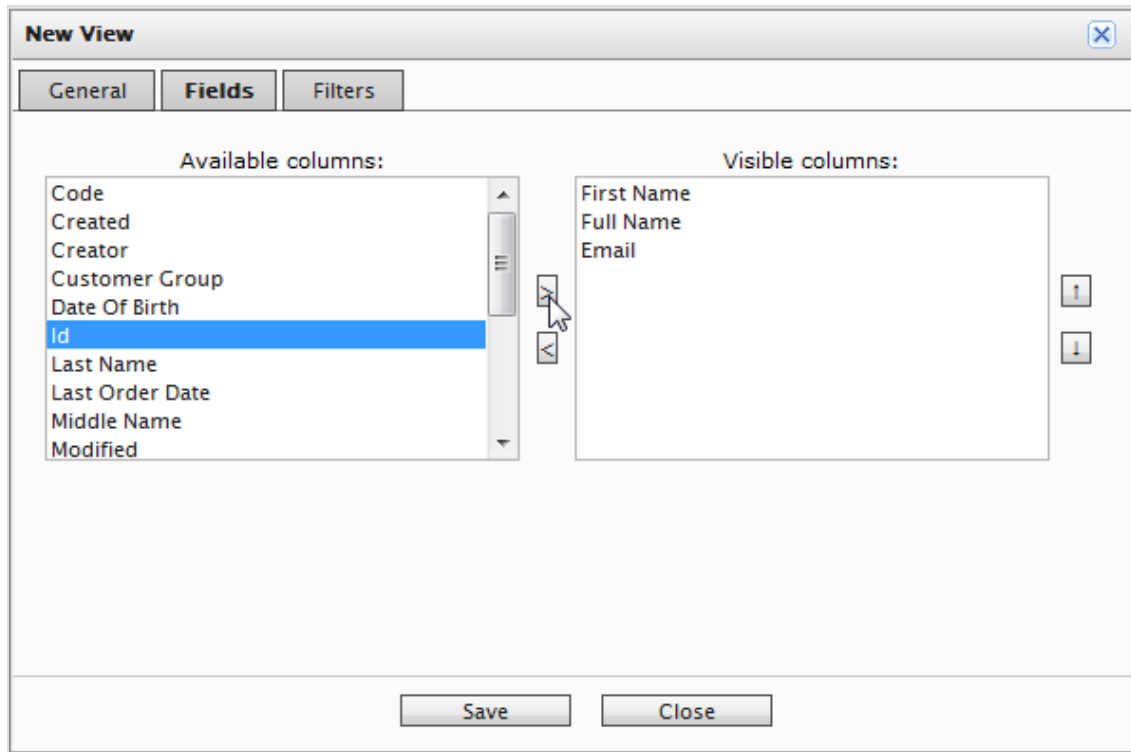


2. On the **General** tab, enter a **Title** for the custom view. Click **Show this view for all users** if you want other users to see this custom view.

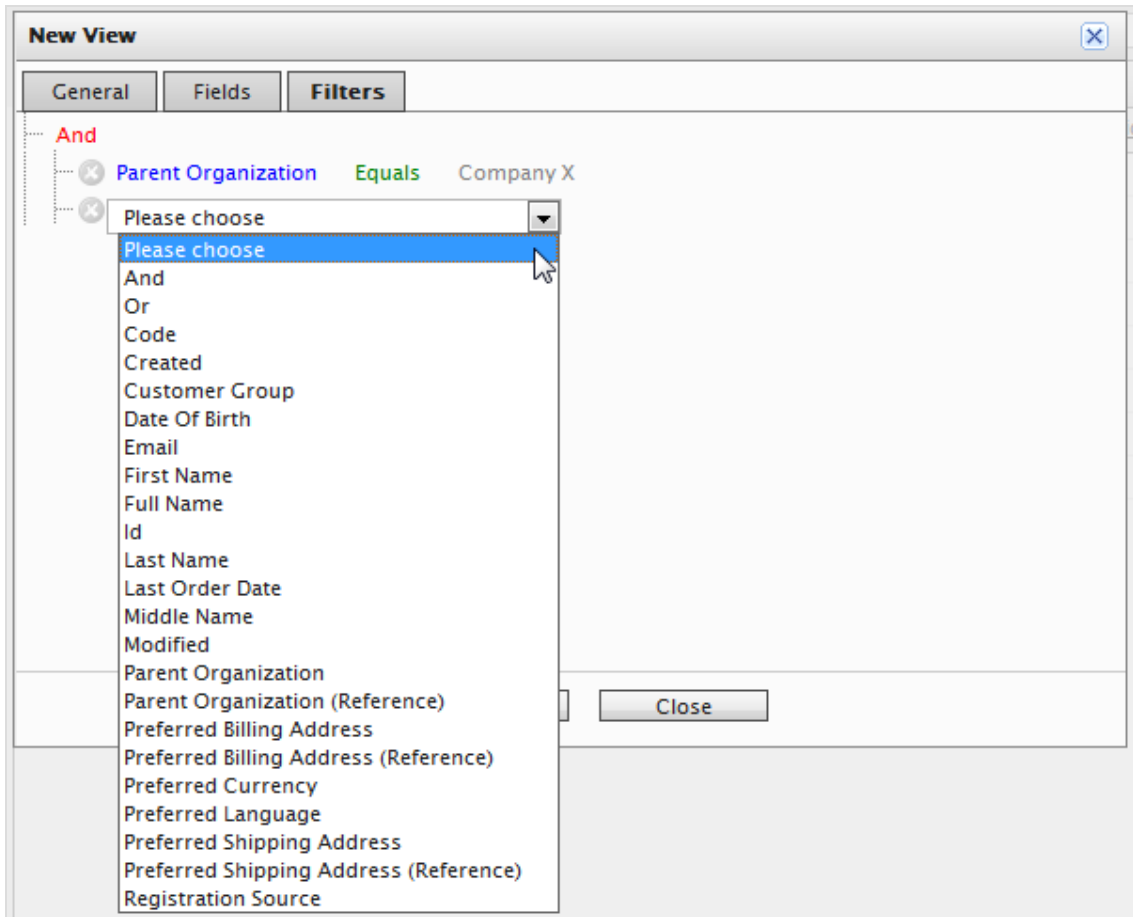


3. On the **Fields** tab, select columns to appear in the custom view. Select an available column then click **Right Arrow** to move it to the **Visible columns** list. To deselect a

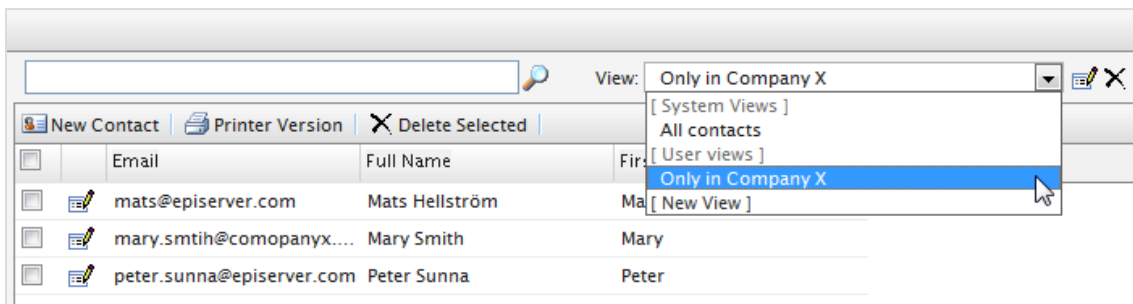
column, select one and click **Left Arrow**. To re-order the list, click **Up** and **Down** arrows.



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

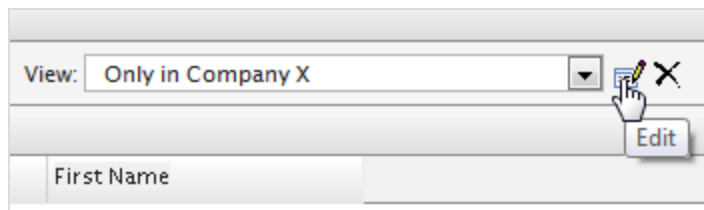


- Click **Save** to return to the **Contacts List** screen. The new view appears in the **View** dropdown list.



Editing and deleting views

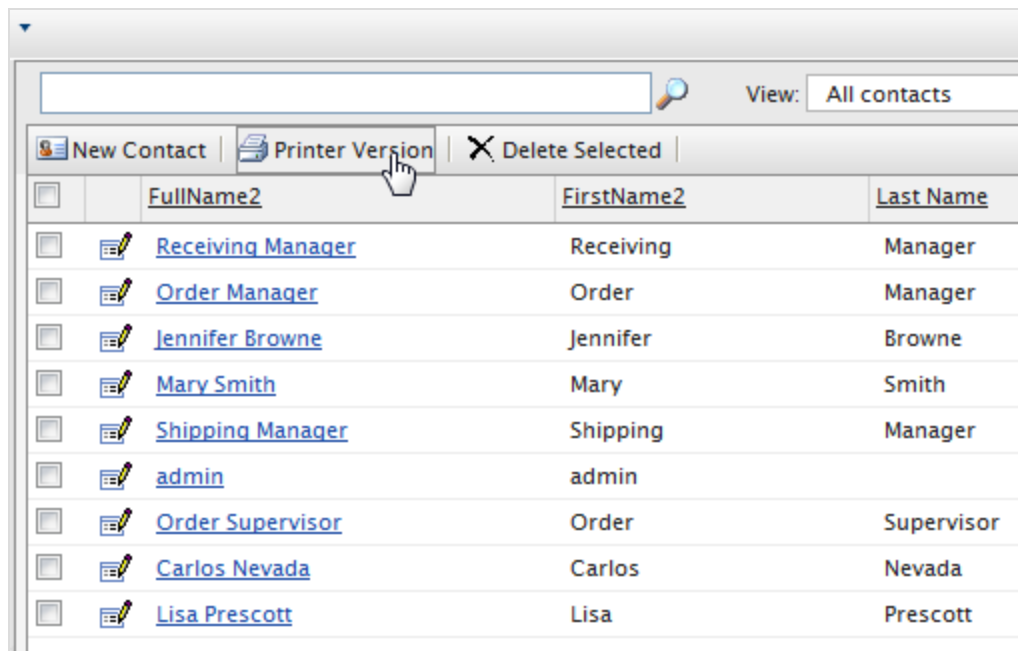
To edit an existing view, select the view from the drop-down list and click **Edit**. The **View Editing** dialog box appears, and you can edit all properties.



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			

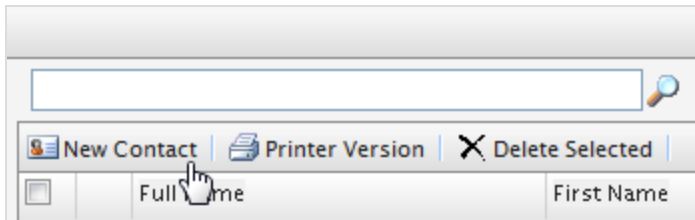
Creating a contact with an account

Note: Creating **system users** and assigning access rights (roles) to work with Optimizely CMS and Optimizely Commerce is done from the **CMS admin view**. See Access rights for Optimizely 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.

Overview

Full Name:


First Name:



Middle Name:


Last Name:


Email:


Contact Email Description


Parent Organization: 
Contact Organization

Customer Group:  

Preferred Currency: 

Preferred Language: 

Preferred Shipping Address: 

Preferred Billing Address: 

Registration Source:

- **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**.

The screenshot displays the 'Contact Information' form for a contact named Mary Smith. The form is organized into several sections:

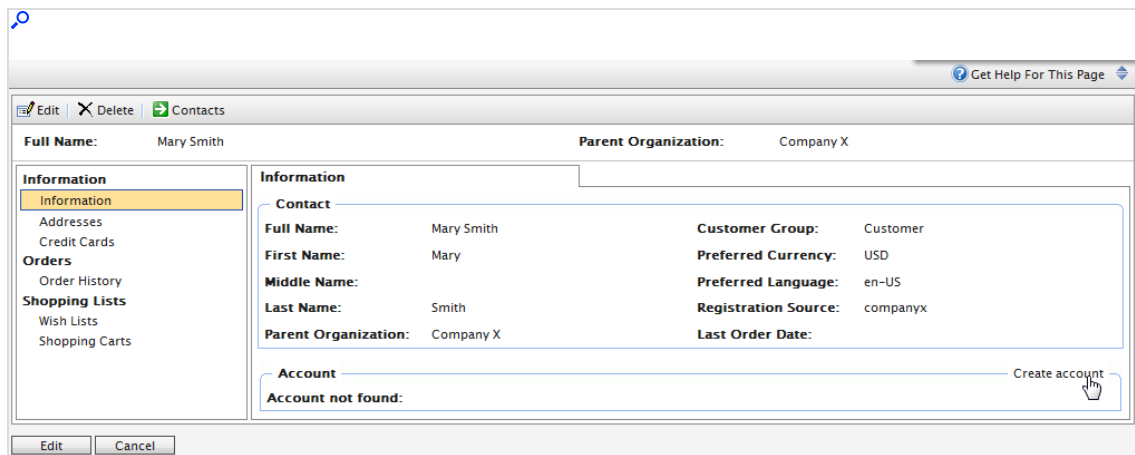
- Header:** Shows 'Full Name: Mary Smith' and 'Parent Organization:'.
- Left Navigation:** A sidebar menu with categories: Information (selected), Addresses, Credit Cards, Contact Notes (with sub-items Order Notes and Contact Notes), Orders (with sub-item Order History), and Shopping Lists (with sub-items Wish Lists and Shopping Carts).
- Main Content Area:**
 - Contact Information:** Fields for Full Name (Mary Smith), First Name (Mary), Middle Name, Last Name (Smith), Parent Organization, Preferred Shipping Address, and Preferred Billing Address.
 - Customer Group:** A dropdown menu.
 - Preferred Currency:** Set to USD.
 - Preferred Language:** Set to en.
 - Registration Source:** A text field.
 - Last Order Date:** A text field.
- Account Section:** A 'Create account' button and the text 'Account not found'.

At the bottom of the form, there are 'Edit' and 'Cancel' buttons.

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.

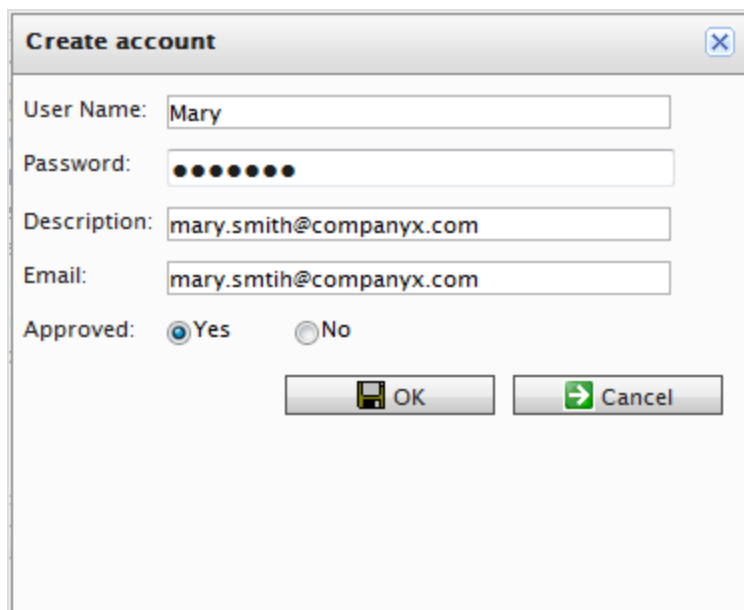


The screenshot shows a web application interface for managing contact information. At the top, there are navigation buttons: 'Edit', 'Delete', and 'Contacts'. Below this, the 'Full Name' is 'Mary Smith' and the 'Parent Organization' is 'Company X'. A sidebar on the left contains a menu with categories: 'Information' (selected), 'Addresses', 'Credit Cards', 'Orders', 'Order History', 'Shopping Lists', 'Wish Lists', and 'Shopping Carts'. The main content area is titled 'Information' and contains a 'Contact' section with the following details:

Full Name:	Mary Smith	Customer Group:	Customer
First Name:	Mary	Preferred Currency:	USD
Middle Name:		Preferred Language:	en-US
Last Name:	Smith	Registration Source:	companyx
Parent Organization:	Company X	Last Order Date:	

Below the contact details, there is an 'Account' section with the text 'Account not found:' and a 'Create account' button. At the bottom of the page, there are 'Edit' and 'Cancel' buttons.

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

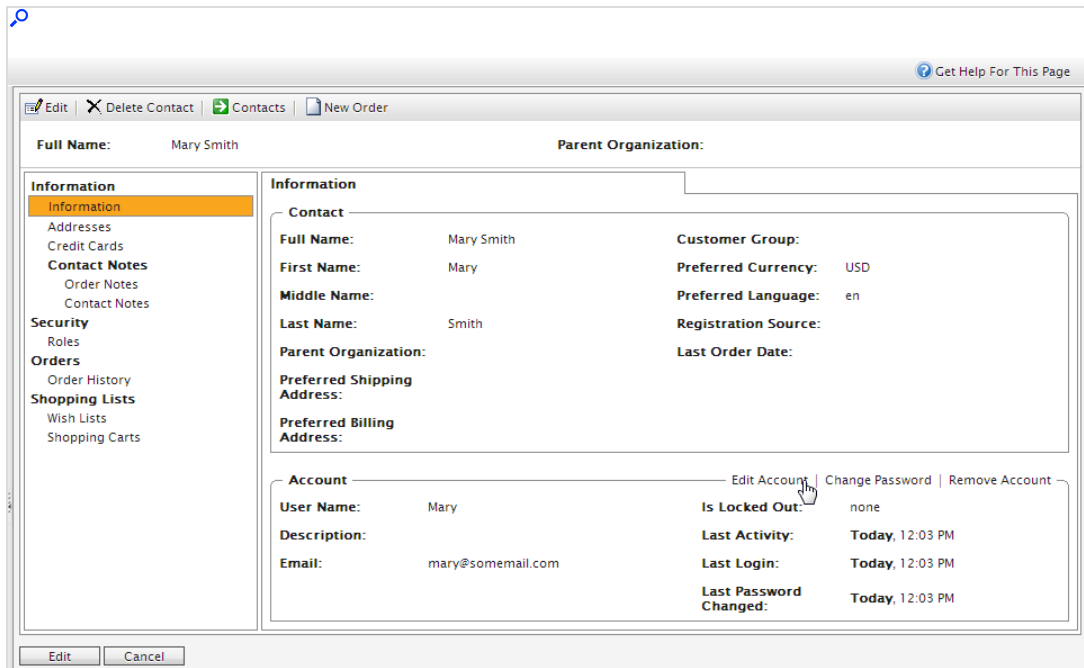


The 'Create account' dialog box is shown with the following fields and options:

- User Name:** Mary
- Password:** [masked with 8 dots]
- Description:** mary.smith@companyx.com
- Email:** mary.smtih@companyx.com
- Approved:** Yes No

At the bottom, there are two buttons: 'OK' and 'Cancel'.

- **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.

The screenshot shows a dialog box titled "Overview" with the following fields and values:











- Full Name:** Mary Smith
- First Name:** Mary
- Middle Name:** (empty)
- Last Name:** Smith
- Email:** mary.smith@companyx.com
- Contact Email Description:** (empty)
- Parent Organization:** Company X (dropdown menu)
- Contact Organization:** (empty)
- Customer Group:** Customer (dropdown menu)
- Preferred Currency:** US dollar (dropdown menu)
- Preferred Language:** English (United States) (dropdown menu)
- Preferred Shipping Address:** [No value] (dropdown menu)
- Preferred Billing Address:** [No value] (dropdown menu)
- Registration Source:** (empty)

At the bottom of the form are "OK" and "Cancel" buttons. A mouse cursor is hovering over the "Customer Group" dropdown, and a tooltip labeled "Edit Dictionary" is visible next to it.

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**.

Manage List			 New Item	 Close
System Name: ContactGroup		Friendly Name: ContactGroup	Type: Single Value	
Nº	Item Value	Display Value		
1	Customer	Customer		
2	Partner	Partner		
3	Distributor	Distributor		

- 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.

Manage List			 New Item	 Close
System Name: ContactGroup		Friendly Name: ContactGroup	Type: Single Value	
Nº	Item Value	Display Value		
1	Customer	Customer		
2	Partner	Partner		
3	Distributor	Distributor		
4	Subvendedor			

- Click **Save**.
- 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.

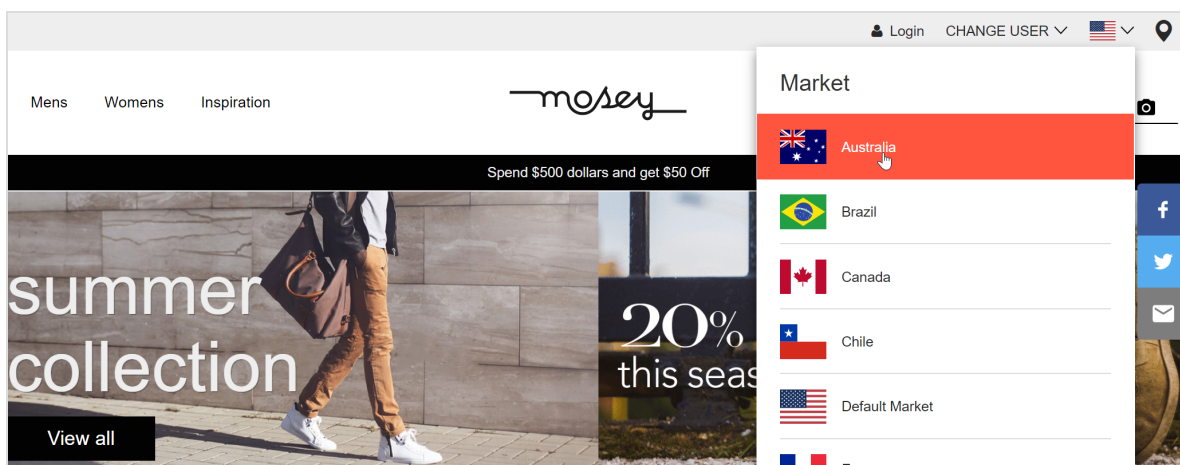
Note: If you change the number to a position higher in the list, the list is not automatically reordered. You must manually edit the list. However, having multiple copies of the same numerical value does not affect the system. You can use the numbers as a ranking system, or devise your own internal numbering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



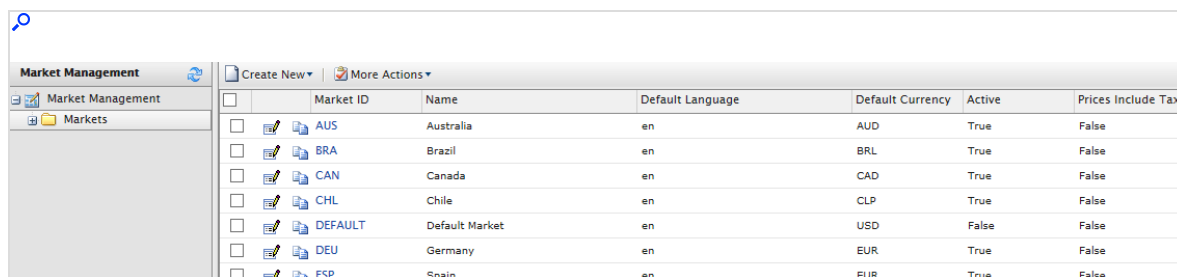
How markets are used

- 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.



	Market ID	Name	Default Language	Default Currency	Active	Prices Include Tax
<input type="checkbox"/>	AUS	Australia	en	AUD	True	False
<input type="checkbox"/>	BRA	Brazil	en	BRL	True	False
<input type="checkbox"/>	CAN	Canada	en	CAD	True	False
<input type="checkbox"/>	CHL	Chile	en	CLP	True	False
<input type="checkbox"/>	DEFAULT	Default Market	en	USD	False	False
<input type="checkbox"/>	DEU	Germany	en	EUR	True	False
<input type="checkbox"/>	ESP	Spain	en	EUR	True	False

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:

Market Name:

Market Description:

Is Active: Yes No

Prices Include Tax: Yes No
This property will affect how prices in this market are calculated in orders

Countries

<p>Available Countries</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica </div>	<input type="button" value="Add ->"/> <input type="button" value="Add All ->>"/> <input type="button" value="<- Remove"/> <input type="button" value="<<- Remove All"/>	<p>Chosen Countries</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> United States </div>
---	--	--

Languages

<p>Available Languages</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> svenska </div>	<input type="button" value="Add ->"/> <input type="button" value="Add All ->>"/> <input type="button" value="<- Remove"/> <input type="button" value="<<- Remove All"/>	<p>Chosen Languages</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> English </div>
--	--	--

Default Language:

Currencies

<p>Available Currencies</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> UAE Dirham Afghanistan Afghani Albanian Lek Armenian Dram Netherlands Antillean Guilder Angolan Kwanza Argentine Peso Australian Dollar </div>	<input type="button" value="Add ->"/> <input type="button" value="Add All ->>"/> <input type="button" value="<- Remove"/> <input type="button" value="<<- Remove All"/>	<p>Chosen Currencies</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> US Dollar </div>
--	--	---

- **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 Optimizely 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 Optimizely'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.

Campaign Name	Status	Available from	Expires on	total orders	Redemptions
QuickSilver Campaign	Active	Yesterday - 8/8/18		0	
Womens handbag sale Campaign	Expired	Aug 1 - Aug 3		0	
Christmas sale Campaign	Inactive	Dec 1 - Dec 24		0	

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.

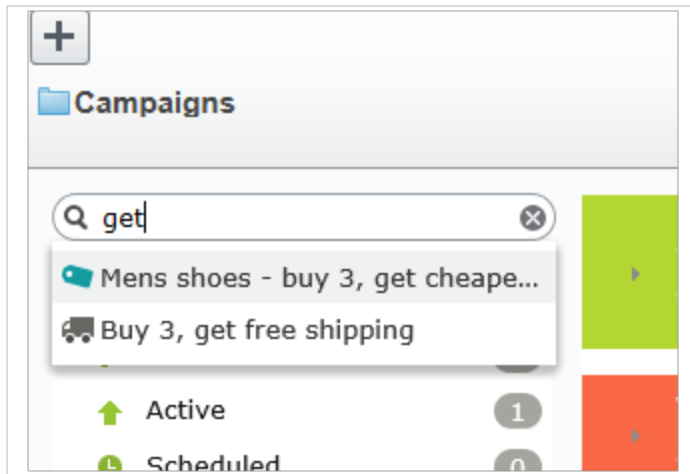
Note: Canceled orders do not appear on Campaign View.

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.

The screenshot displays the 'Campaigns' management interface. On the left, there are three filter sections: 'CAMPAIGN STATUS' with options All (1), Active (0), Scheduled (1), Expired (0), and Inactive (0); 'DISCOUNT TYPE' with options Item (1), Order (0), and Shipping (0); and 'MARKET' with options Australia and New Zealand, ASEAN, Default Market, Europe, Central and South America, Scandinavia, and USA and Canada. On the right, an orange banner highlights a 'Spring 2017 Campaign' with the text 'Spend \$20 get free deicer' and 'Item discount'.

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

 Video tutorial: [Demo of creating a campaign and discount](#) (4:46 minutes)

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

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

CAMPAIGN STATUS	
All	1
Active	1
Scheduled	0
Expired	0
Inactive	0

DISCOUNT TYPE	
Item	1
Order	1
Shipping	1

MARKET	
Australia	
Brazil	
Canada	

Name	Status	Total Orders	Redemptions
QuickSilver Campaign	Active Yesterday - 5/8/18	24	
\$10 off shipping from Women's Shoes Shipping discount		12 orders	12
\$50 off Order over \$500 Order discount		8 orders	8
20 % off Mens Shoes Item discount		4 orders	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	<p>Select the date and time when the campaign is available.</p> <p>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.</p> <p>Note: The time refers to local time on the Optimizely server. For example, you manage the website from Stockholm, Sweden and set a campaign to expire at 11:00 PM. Due to a nine-</p>

Field	Description
	<p>hour time difference, for a customer in California, USA, the campaign expires at 2:00 PM.</p>
Expires on	Select the date and time when the campaign is no longer available.
Active	<p>Select the box to make the campaign active, or clear it to make it inactive.</p> <p>For a campaign to be active, the Active box must be selected <i>and</i> the shopping date/time must be between the Available from and Expires on dates/times.</p> <p>Active check box examples</p> <ul style="list-style-type: none"> • 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	<p>Select one or more target markets. If you select no markets, the campaign is effectively inactive.</p> <p>Effects of choosing markets</p> <ul style="list-style-type: none"> • 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	<p>Specify a revenue goal for the campaign.</p> <p>Note: Optimizely Commerce does not currently use this value—you must manually track campaign revenue.</p>
Tracking Code	Use to enter a tracking code for campaign analytics. This field must

Field	Description
	<p>be 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. Optimizely Commerce does not use the tracking code for any internal functionality.</p> <p>By default, the code is not stored with the order after checkout. But you can get promotions from <code>IOrderForm.Promotions</code>, then get their campaigns and tracking codes.</p>
Personalization	<p>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.</p> <p>Note: If more than two visitor groups are selected, hover over the ellipsis to see them all.</p>
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

Optimizely Commerce has a powerful and flexible feature for applying discounts to create targeted [campaigns](#). Optimizely 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

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

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

 Video tutorial: [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, upload it to the Optimizely media folder, then select it here. Uploading media.


Field	Description
	The image can illustrate the discount on the web page. Your developer determines how to display the banner.
<p>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.</p>	
<p>Available from</p>	<p>Select the date and time when the discount is available.</p> <p>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.</p> <p>Note: The time refers to local time on the Optimizely 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.</p>
<p>Expires on</p>	<p>Select the date and time when the discount is no longer available.</p>
<p>Active</p>	<p>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.</p> <p>Active check box examples</p> <ul style="list-style-type: none"> • 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.
<p>Promotion codes</p>	<p>If applicable, enter a promotion code for this discount. Promotion codes are also known as coupons.</p>

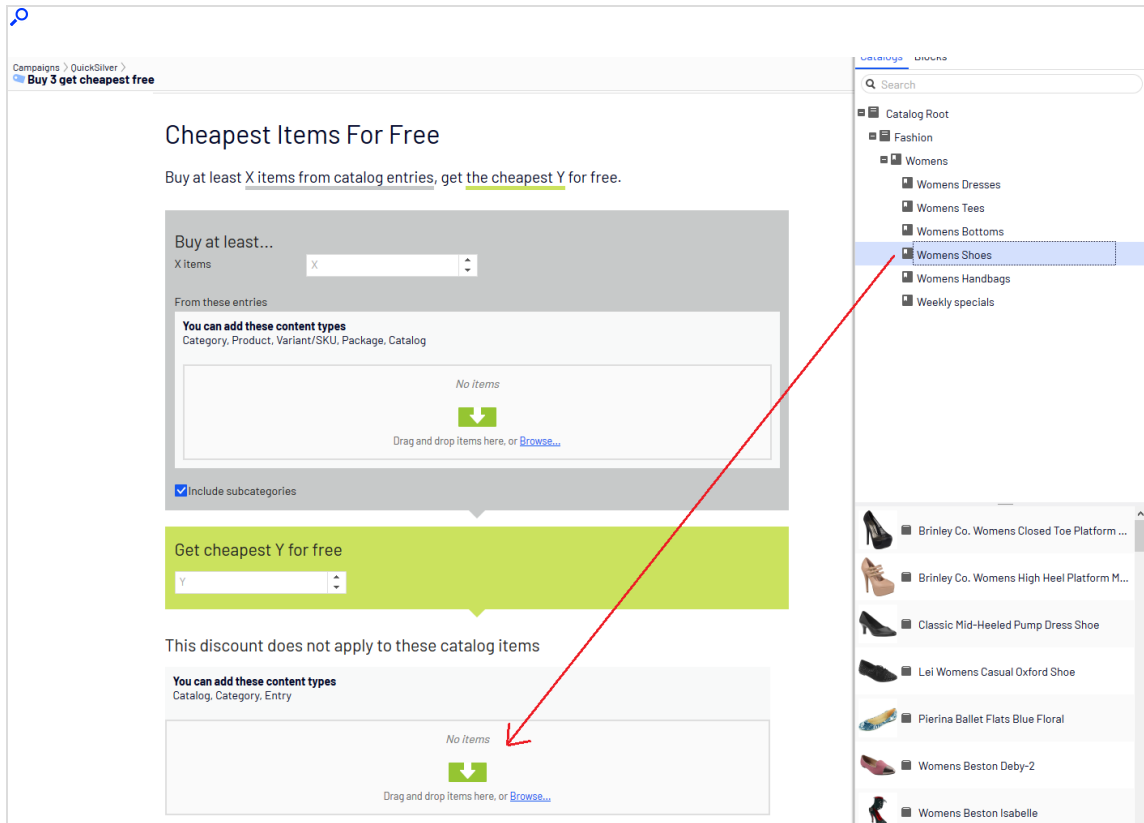
Field	Description
	See also: Using promotion codes .
Discount	Complete the information to define the discount. See Example: Buy three items, get cheapest free and Built-in discounts .
This discount does not apply to these catalog items	Use this area to exclude catalogs, categories, or catalog entries from a specific discount. See Exclude catalog items from a discount .
Redemption limits	If applicable, enter one or more <i>redemption limits</i> 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.

Different start and end dates, within the campaign dates

Available from

Expires on

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.

Active	0	Redemptions
May 1 - May 31	total orders	
going live Jun 7	0 orders	☰
Inactive	0 orders	Options

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.

Active	0	Redemptions
May 1 - May 31	total orders	
going live Jun 7	0 orders	☰
Inactive	0 orders	Options

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

How Optimizely Commerce determines which items to discount

Sometimes, an order has several discount-eligible items but not all can be discounted. For example, if a customer buys 5 shirts, they get a discount on two. Or, the **limit number of dis-**

counted items drop-down restricts how many items get discounted. To determine *which* items are discounted, Optimizely 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.

Edit Discount

Name

Description

Banner Image

Scheduling and Status

Schedule the discount to follow the campaign, or select a different date range. Enable the discount by selecting 'Active'.

Same as the campaign (Aug 24, 12:00 AM to Tomorrow, 12:00 AM)

Different start and end dates, within the campaign dates

Active

Promotion Codes

Specify a promotion code for customers to qualify for discount.

Promotion code

Discount: Reduction on Related Items

Buy at least X items from catalog entries and get related catalog entries at a discount.

Buy at least...

X items

From these entries

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](#).

Redemption Limits

The number of times a promotion can be redeemed. If limits are increased during a campaign period the previous redemptions will be kept.

Total	<input style="width: 100%; border: 1px solid #ccc;" type="text" value="Unlimited"/>
	<input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="▲"/> <input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="▼"/>
	Redeemed in total across all orders
Order	<input style="width: 100%; border: 1px solid #ccc;" type="text" value="Unlimited"/>
	<input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="▲"/> <input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="▼"/>
	Per order
Customer	<input style="width: 100%; border: 1px solid #ccc;" type="text" value="Unlimited"/>
	<input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="▲"/> <input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="▼"/>
	Per registered user

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.

Campaigns		
Handbag sale Campaign	Active Aug 24 - Tomorrow	Redemptions
handbag sale Item discount		1

Built-in discounts

Optimizely 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.

Cheapest Items For Free

Buy at least X items from catalog entries, get the cheapest Y for free.

Buy at least...

X items

From these entries

You can add these content types

All

No items

↓

Drag and drop items here, or [Browse...](#)

Include subcategories

Get cheapest Y for 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.

Most Expensive Items For Free

Buy at least X items from catalog entries, get the most expensive Y for free.

Buy at least...

X items

From these entries

You can add these content types
All

No items

Drag and drop items here, or [Browse...](#)

Include subcategories

Get most expensive Y for 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

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	<input type="text" value="Not set"/>
DKK	<input type="text" value="Not set"/>
EUR	<input type="text" value="Not set"/>
GBP	<input type="text" value="Not set"/>
NOK	<input type="text" value="Not set"/>
NZD	<input type="text" value="Not set"/>
RUB	<input type="text" value="Not set"/>
SEK	<input type="text" value="Not set"/>
USD	<input type="text" value="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

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

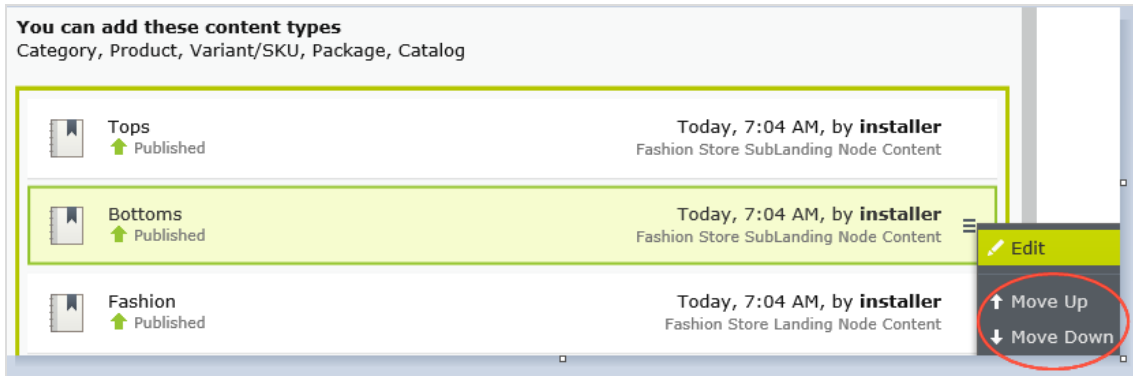
At the following discount

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.

Buy Products for Discount on All Selections

Buy at least X items from catalog entries and get a discount on every selected items.

Buy at least...
X items

From these entries

You can add these content types
All

No items

Drag and drop items here, or [Browse...](#)

Include subcategories

At the following discount

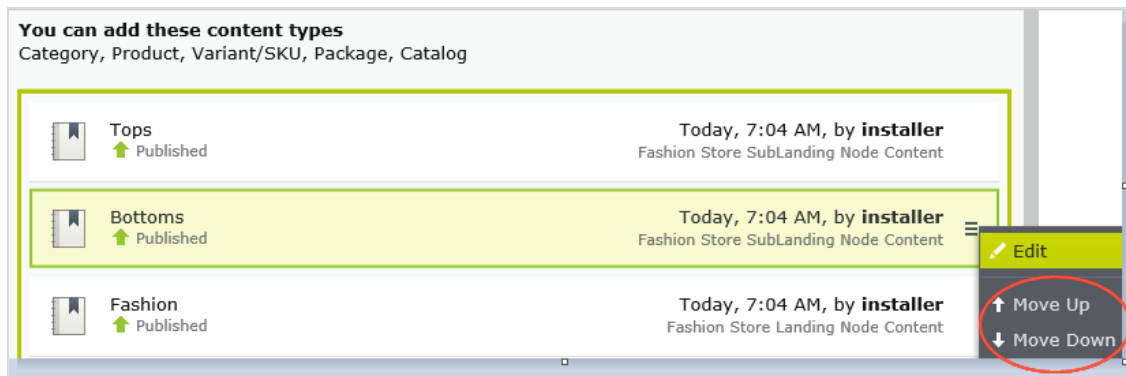
Percentage off %

Amount off

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 Optimizely Commerce typically handles redemption limits, where item quantity does not affect them.

[How Optimizely Commerce determines which items to discount](#) explains what happens if only some items are discounted because a redemption limit is reached.

Buy Products for Discount in Same Categories

Buy any items from category to get a discount on them.

Buy from

At the following discount

Percentage off %

Amount off

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	<input type="text" value="Not set"/>
DKK	<input type="text" value="Not set"/>
EUR	<input type="text" value="Not set"/>
GBP	<input type="text" value="Not set"/>
NOK	<input type="text" value="Not set"/>
NZD	<input type="text" value="Not set"/>
RUB	<input type="text" value="Not set"/>
SEK	<input type="text" value="Not set"/>
USD	<input type="text" value="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

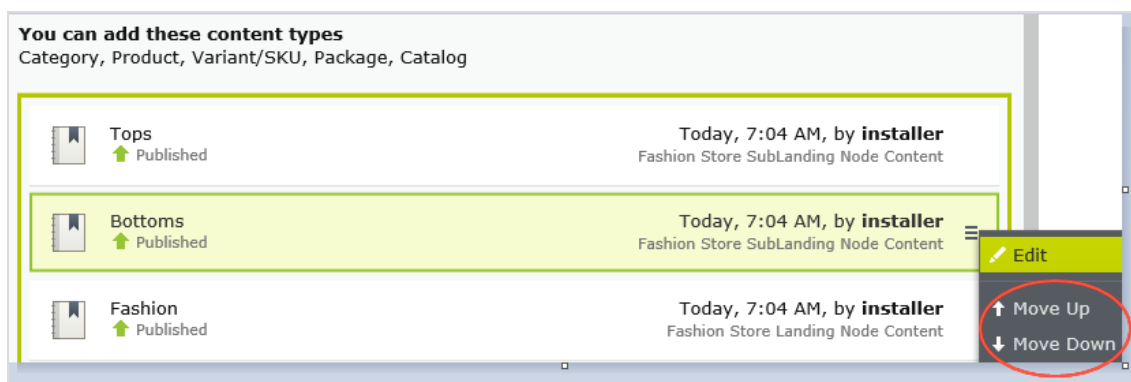
At the following discount

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 Optimizely 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.

Spend for Free Items

Spend at least X amount and get all variants/skus as gift items.

Spend at least...

Currency	Amount
AUD	<input type="text" value="Not set"/>
DKK	<input type="text" value="Not set"/>
EUR	<input type="text" value="Not set"/>
GBP	<input type="text" value="Not set"/>
NOK	<input type="text" value="Not set"/>
NZD	<input type="text" value="Not set"/>
RUB	<input type="text" value="Not set"/>
SEK	<input type="text" value="Not set"/>
USD	<input type="text" value="Not set"/>

Get free items

You can add these content types

Variant/SKU, Package

No items



Drag and drop items here, or [Browse...](#)

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.

Spend for Discount on Order

Spend at least X amount and receive a discount off total order value.

Spend at least...

Currency	Amount
AUD	<input type="text" value="Not set"/>
DKK	<input type="text" value="Not set"/>
EUR	<input type="text" value="Not set"/>
GBP	<input type="text" value="Not set"/>
NOK	<input type="text" value="Not set"/>
NZD	<input type="text" value="Not set"/>
RUB	<input type="text" value="Not set"/>
SEK	<input type="text" value="Not set"/>
USD	<input type="text" value="Not set"/>

Get the following discount

Percentage off %

Amount off

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.

Buy Products and Get Discount on Order

Buy at least X items from catalog entries and get discount on order value.

Buy at least...


X items

From these entries

You can add these content types

All

No items



Drag and drop items here, or [Browse...](#)

Include subcategories

Get the following discount

Percentage off %

Amount off

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	<input type="text" value="Not set"/>
DKK	<input type="text" value="Not set"/>
EUR	<input type="text" value="Not set"/>
GBP	<input type="text" value="Not set"/>
NOK	<input type="text" value="Not set"/>
NZD	<input type="text" value="Not set"/>
RUB	<input type="text" value="Not set"/>
SEK	<input type="text" value="Not set"/>
USD	<input type="text" value="Not set"/>

Get selected shipping methods...

- AUS : Express-AUD
- AUS : Fast-AUD
- 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.

Buy Products for Discount on Shipping Cost

Buy at least X items from categories/entries and receive a discount off selected shipping methods.

Buy at least...


X items

From these entries

You can add these content types

All

No items



Drag and drop items here, or [Browse...](#)

Include subcategories

Get selected shipping methods...

AUS : Express-AUD

AUS : Fast-AUD

AUS : Regular-AUD

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 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 screenshot shows a configuration interface for a 'Buy Products for Free Shipping' campaign. At the top, the title 'Buy Products for Free Shipping' is displayed. Below it, a summary line reads: 'Buy at least X items from categories/entries and receive free shipping for selected shipping methods.' The main configuration area is divided into two sections. The first section, 'Buy at least...', includes a dropdown menu for 'X items' with the value 'X' selected. Below this is a 'From these entries' section with a sub-header 'You can add these content types' and the value 'All'. A dashed box contains the text 'No items', a green downward arrow icon, and the instruction 'Drag and drop items here, or Browse...'. A checkbox labeled 'Include subcategories' is checked. The second section, 'Get selected shipping methods...', is highlighted in blue and contains three checked checkboxes: 'AUS : Express-AUD', 'AUS : Fast-AUD', and 'AUS : Regular-AUD'.

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.

Spend for Free Shipping

Spend at least X amount and get free shipping for selected shipping methods.

Spend at least...

Currency	Amount
AUD	<input type="text" value="Not set"/>
DKK	<input type="text" value="Not set"/>
EUR	<input type="text" value="Not set"/>
GBP	<input type="text" value="Not set"/>
NOK	<input type="text" value="Not set"/>
NZD	<input type="text" value="Not set"/>
RUB	<input type="text" value="Not set"/>
SEK	<input type="text" value="Not set"/>
USD	<input type="text" value="Not set"/>

Get selected shipping methods...

- AUS : Express-AUD
- AUS : Fast-AUD
- AUS : Regular-AUD

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).

Discount Priorities			Save	Close
1	Cardigans clearing Item discount	Scheduled Dec 19 - Dec 24	Christmas sales	
2	Denims clear models Item discount	Scheduled Dec 19 - Dec 24	Christmas sales	↑ Move Up
3	Sweaters associated Item discount	Active Dec 1 - Dec 31	Ski accessories	↓ Move Down

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.

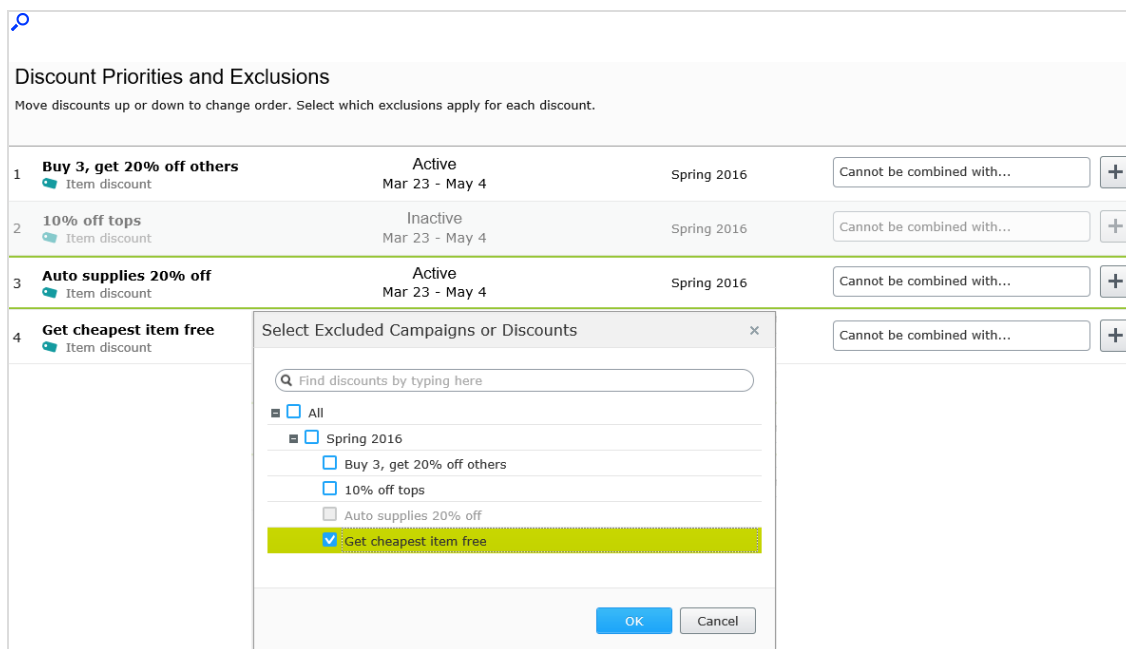
- **Example 1: Two discount percentages**
 - First discount: percentage 20%
 - First discount amount: \$20
 - Adjusted price: \$80
 - Second discount: percentage 30% (of \$80)
 - Second discount amount: \$24
 - Final adjusted price: \$56
- **Example 2: Two discount amounts**
 - First discount: amount \$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.



Discount Priorities and Exclusions
Move discounts up or down to change order. Select which exclusions apply for each discount.

Order	Discount Name	Status	Period	Exclusions	Action
1	Buy 3, get 20% off others Item discount	Active	Mar 23 - May 4	Spring 2016	Cannot be combined with... +
2	10% off tops Item discount	Inactive	Mar 23 - May 4	Spring 2016	Cannot be combined with... +
3	Auto supplies 20% off Item discount	Active	Mar 23 - May 4	Spring 2016	Cannot be combined with... +
4	Get cheapest item free Item discount				Cannot be combined with... +

Select Excluded Campaigns or Discounts [X]

Find discounts by typing here

- All
- Spring 2016
 - Buy 3, get 20% off others
 - 10% off tops
 - Auto supplies 20% off
 - Get cheapest item free

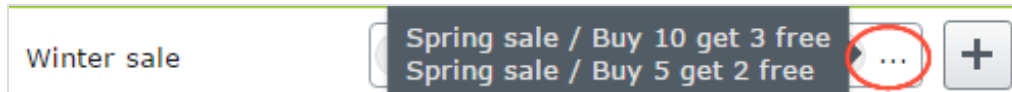
OK Cancel

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.

USD

Not set

Get the following discount

Percentage off %

Amount off

This discount does not apply to these catalog items

You can add these content types
Catalog, Category, Entry

No items

↓

Drag and drop items here, or [Browse...](#)

Redemption Limits

The number of times a discount can be redeemed. If limits are increased during a campaign period the previous redemptions will be kept.

Total

Redeemed in total across all orders

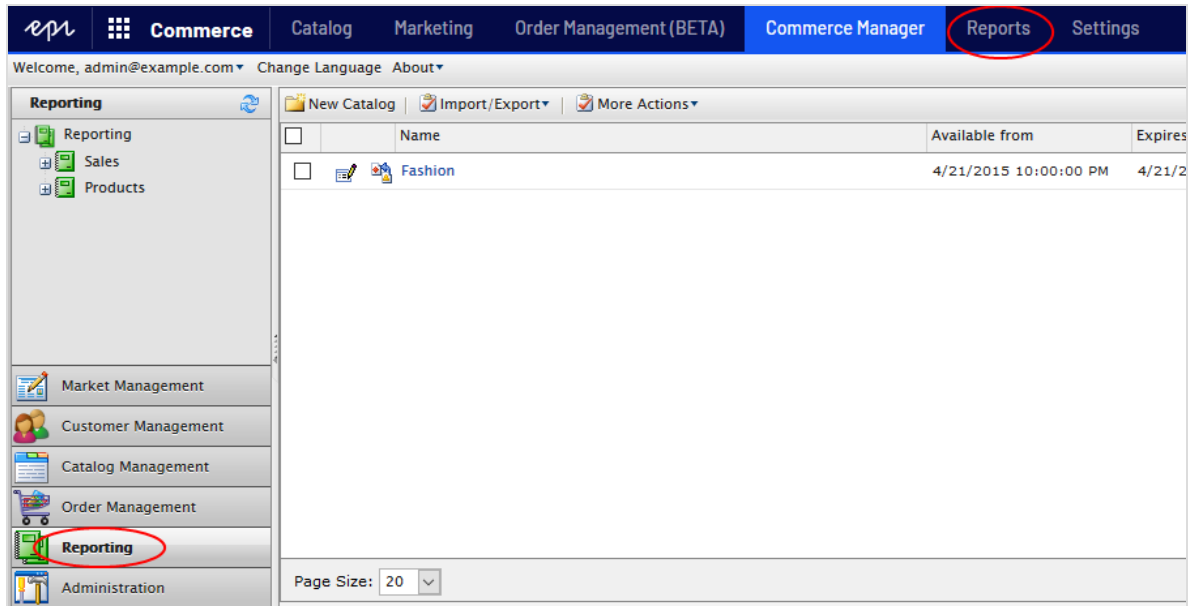
Customer

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

Optimizely 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 [Optimizely World](#).

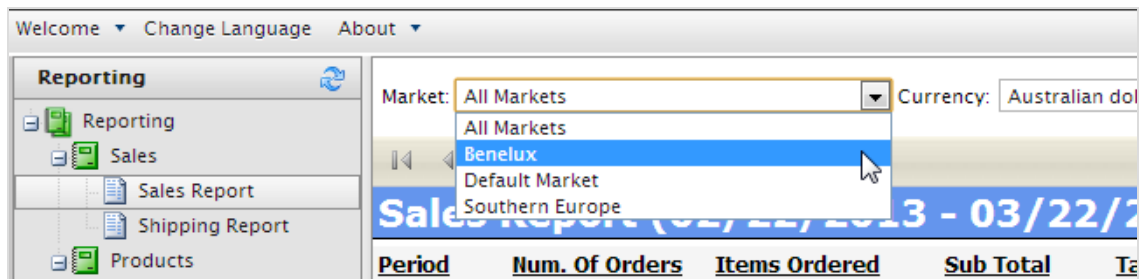
Managing reports

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

This report shows the following Optimizely Commerce order information for each day. To learn about how this data is collected, see [Collect data for reports](#).

To compile the data used in this report, run the [Collect order data for reports](#) 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 Optimizely.

You can configure and administer Optimizely 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 Optimizely Commerce are added from the Optimizely CMS admin and edit views, as described in [Managing website languages in the CMS Administrator User Guide](#).

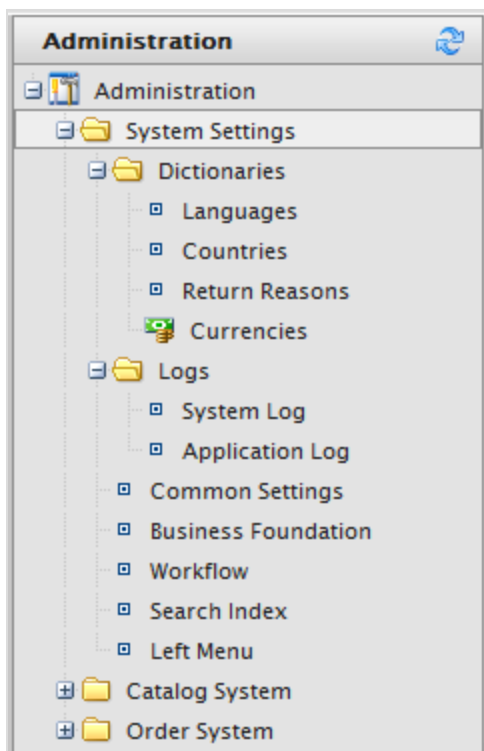
You can do the following from the administration interface:

- 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 Optimizely 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 Optimizely CMS Admin view, as described in [Scheduled jobs](#).

System settings

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

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 Optimizely Commerce from the Optimizely 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 Optimizely.

Dictionaries and dictionary values enrich data when you work with [currencies](#), [countries](#), [customer organization](#), [customer contact groups](#), [return reasons](#), and catalog content.

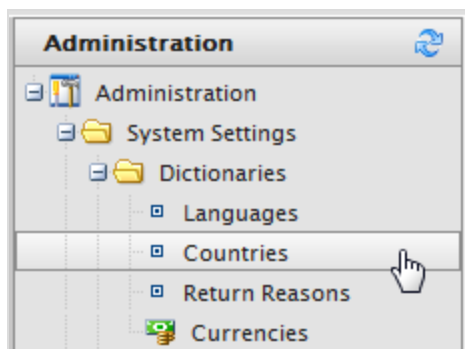
Note: You add languages in Commerce from the Optimizely CMS admin and edit views, as described in [Managing website languages](#) in the CMS Administrator User Guide.

Adding a country to dictionaries

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

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

Edit Command	Name	Ordering	Visible
	CA	0	<input checked="" type="checkbox"/>

- **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.

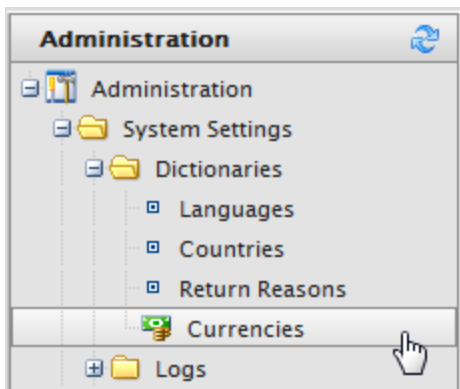
Regions:			
Edit Command	Name	Ordering	Visible
Update Cancel	CA	0	<input checked="" type="checkbox"/>

Adding a currency to dictionaries

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

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.

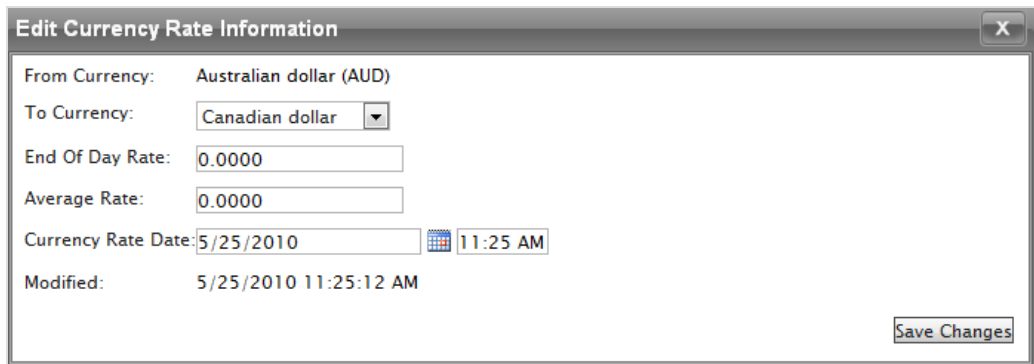
The screenshot shows the 'New Currency' dialog box with the 'Overview' tab selected. The 'Rates' tab is also visible. The form contains the following fields: 'Currency Name:' (text input), 'Code:' (text input), and 'Modified:' (text input). At the bottom, there are 'OK' and 'Cancel' buttons.

- **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.



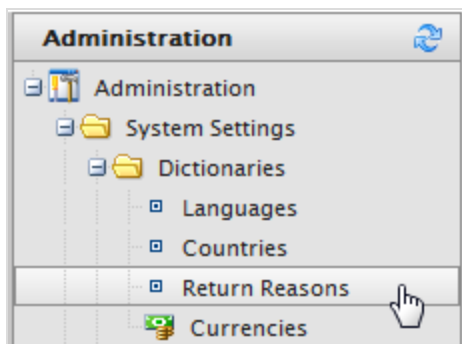
- **From Currency.** Displays the current currency.
- **To Currency.** Select the currency to which you want to convert from the current currency.
- **End of Date Rate.** Enter the end-of-day rate.
- **Average Rate.** Enter the average rate.
- **Currency Rate Date.** Enter a currency rate date.

3. Click **Save Changes**.

Creating a return reason

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

Return reasons add data about return in the order management process. The built-in return reasons in Optimizely 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 Optimizely.

Logs contains the system log and application log. These logs track the activities within the Optimizely 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 Optimizely Commerce.

The screenshot shows the 'Administration' section of the Optimizely Commerce interface. The left-hand navigation menu is expanded to show 'Logs', which includes 'System Log', 'Application Log', 'Common Settings', 'Business Foundation', 'Workflow', 'Search Index', and 'Left Menu'. The main content area is titled 'Filter Settings' and contains the following fields:

- Operation:
- Object Type:
- Created Before:
- Apply Filter button

Below the filter settings is a table of log entries:

Operation	Object Key	Object Type	User Name	Created	Notes
LOGIN	login.aspx	Commerce Manager	admin	Today, 11:14 AM	
LOGIN	login.aspx	Commerce Manager	admin	Today, 10:18 AM	
ERROR	HandleException	Mediachase.Cms.CmsHttpModule		Yesterday, 4:18 PM	Front en Mediach has exp
ERROR	HandleAdminException	Mediachase.Cms.CmsHttpModule	admin	Yesterday, 3:34 PM	Backend Mediach key was
LOGIN	login.aspx	Commerce Manager	admin	Yesterday, 2:04 PM	

- 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.

The screenshot shows the Administration interface with the following components:

- Navigation Menu:** Administration, System Settings, Dictionaries, Logs (System Log, Application Log), Common Settings, Business Foundation, Workflow, Search Index, Left Menu, Catalog System, Order System.
- Filter Settings:**
 - Source Type:
 - Object Type:
 - Operation:
 - Created Before: 5/22/2012 11:46 AM
- Export Log:**
- Table:**

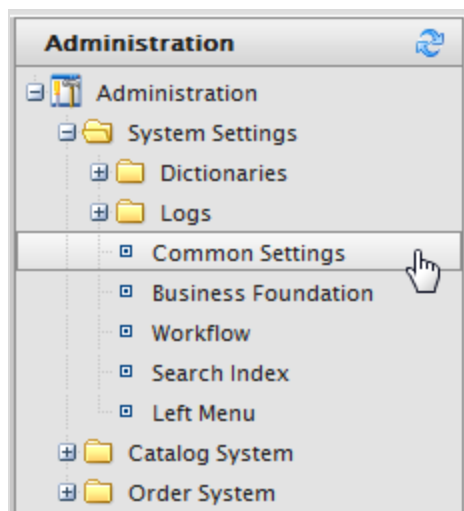
Source	Operation	Object Key	Object Type	User Name	Created	
<input type="checkbox"/>	catalog	Modified	2769	entry	admin	5/14/2013 3:31:04
<input type="checkbox"/>	catalog	Modified	2769	entry	admin	5/14/2013 3:31:04
<input type="checkbox"/>	catalog	Modified	2769	entry	admin	5/14/2013 3:31:02
<input type="checkbox"/>	catalog	Modified	2781	entry	admin	4/26/2012 2:54:52
<input type="checkbox"/>	catalog	Modified	2781	entry	admin	4/26/2012 2:54:52

- 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 Optimizely.

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:

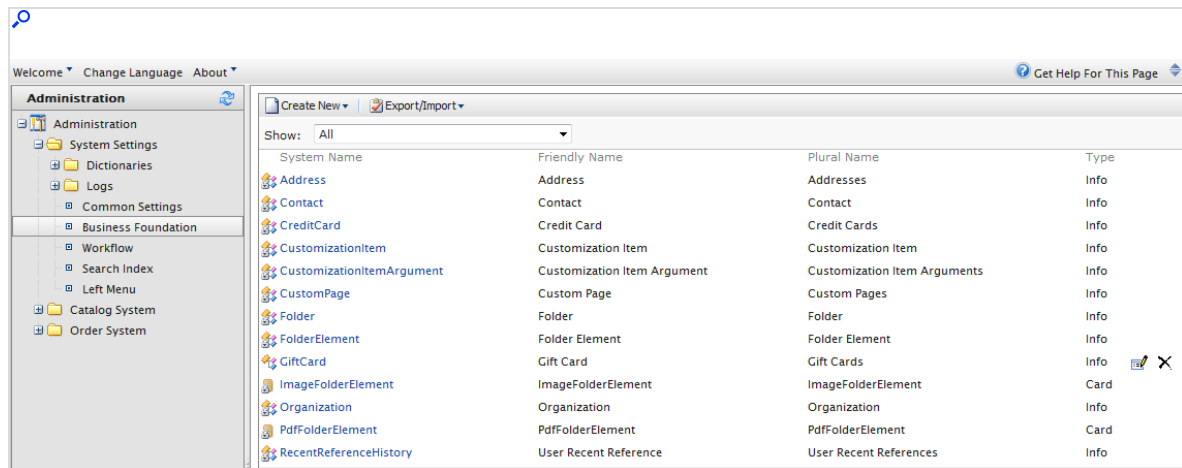
- **Language.** Select from the available languages as defined in the [language settings](#). See also: [Multi-language management](#).
- **Currency.** Select from the available currencies as defined in the [currency settings](#).
- **Length units.** Select **Centimeters** or **Inches**. Length settings are used for calculating shipping costs.
- **Weight units.** Select **Kilograms** or **Pounds**. Weight settings are used for calculating shipping costs.

Overview	
Default Language:	English <i>Language that will be selected by default in drowdowns, etc.</i>
Default Currency:	US dollar <i>Currency that will be used is cases where currency is needed but not specified</i>
Default Length Unit:	Centimeters <i>Default unit of length</i>
Default Weight Unit:	Pounds <i>Default unit of weight</i>
OK Cancel	

Business foundation

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

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 Optimizely Asset system.

Creating a business object

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

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.

- 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.

- Click **Save**. The details of your newly created business object appear.

Fields	1:N Relations	N:1 Relations	N:N Relations	Forms	System Views
System Name			Friendly Name		Type
Contract			Contract Name		Text
ContractId			Id		Guid

Customizing a business object

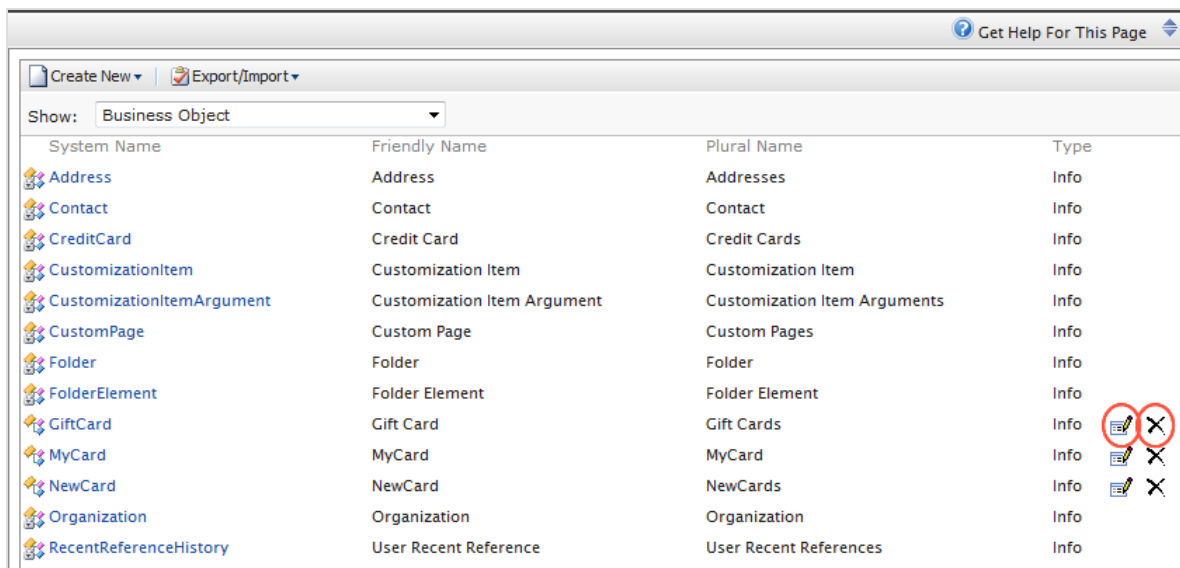


Note: This topic is intended for administrators and developers with administration access rights in Optimizely.

A good starting point to model business objects for your needs is to customizing an existing business object. Optimizely 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.



System Name	Friendly Name	Plural Name	Type	Actions
Address	Address	Addresses	Info	Info
Contact	Contact	Contact	Info	Info
CreditCard	Credit Card	Credit Cards	Info	Info
CustomizationItem	Customization Item	Customization Item	Info	Info
CustomizationItemArgument	Customization Item Argument	Customization Item Arguments	Info	Info
CustomPage	Custom Page	Custom Pages	Info	Info
Folder	Folder	Folder	Info	Info
FolderElement	Folder Element	Folder Element	Info	Info
GiftCard	Gift Card	Gift Cards	Info	Edit, Delete
MyCard	MyCard	MyCard	Info	Edit, Delete
NewCard	NewCard	NewCards	Info	Edit, Delete
Organization	Organization	Organization	Info	Info
RecentReferenceHistory	User Recent Reference	User Recent References	Info	Info

Editing an existing field of a business object

You can edit or delete fields that have an **Edit** and **Delete** icon next to them.



Field Name	Field Type	Actions
CreditCardNumber	Card Number	Info
CustomerServicePhoneNumber	Customer Service Phone Number	Info
ExpirationMonth	Expiration Month	Info
ExpirationYear	Expiration Year	Edit

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 Optimizely.

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.

System Name	Friendly Name	Plural Name	Type
Address	Address	Address	Info
Contact	Contact	Contact	Info
CreditCard	Credit Card	CreditCard	Info
CustomizationItem	Customization Item	Customization Items	Info
CustomizationItemArgument	Customization Item Argument	Customization Item Arguments	Info
CustomPage	Custom Page	Custom Pages	Info
Folder	Folder	Folder	Info
FolderElement	FolderElement	FolderElement	Info
GiftCard	Gift Card	Gift Cards	Info
ImageFolderElement	ImageFolderElement	ImageFolderElement	Card
Organization	Organization	Organization	Info
PdfFolderElement	PdfFolderElement	PdfFolderElement	Card
RecentReferenceHistory	User Recent Reference	User Recent References	Info

- 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.

Business Object Customization New Field | Edit | Publish | Back To List

System Name: CreditCard **Friendly Name:** Credit Card

Type: Business Object **Plural Name:** CreditCard

Fields	1:N Relations	N:1 Relations	N:N Relations	Forms	System Views
System Name			Friendly Name		Type
Address			Address		Text (ReferencedField)
AddressId			Address		Reference
CardType			Type		CreditCardType
Contact			Contact		Text (ReferencedField)
ContactId			Contact		Reference
Created			Created		DateTime
CreatorId			Creator		Guid
CreditCardId			Id		Guid
CreditCardNumber			Card Number		Text
ExpirationMonth			Expiration Month		Integer
ExpirationYear			Expiration Year		Integer
LastFourDigits			Last Four Digits		Text
Modified			Modified		DateTime
ModifierId			Modifier		Guid
Organization			Organization		Text (ReferencedField)
OrganizationId			Organization		Reference
SecurityCode			Security Code		Text

- Fill out the **New Field** form to specify the type of data field you want created for the business object.

New Field Back

Business Object: Credit Card

Field Name: CustomerServicePhoneNumber

Friendly Name: CustomerServicePhoneNumber

Description:

Allow Nulls

Add Field To:

Edit Form

View Form

Short Info Form

Field Type: String

Format: Text

Maximum Length: 100

Unique value

- **Business Object.** Automatically populated with the business object name.
 - **Field Name.** Enter the system ID or name of the field. This name automatically populates 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.

	CreditCardId	Id	Guid	
	CreditCardNumber	Card Number	Text	
	CustomerServicePhoneNumber	Customer Service Phone Number	Text	
	ExpirationMonth	Expiration Month	Integer	

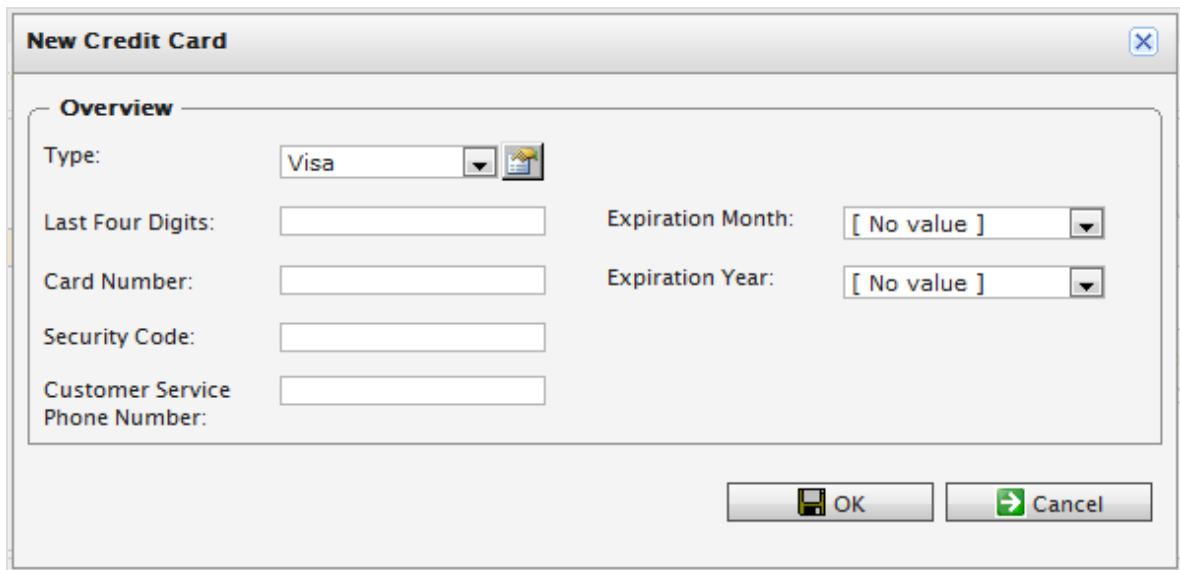
5. To verify the new field, check the form associated with that new field.

Customizing a form

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

This section describes how to customize and adapt a form for your Optimizely Commerce users.

Forms dictate how fields appear to the Optimizely 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.



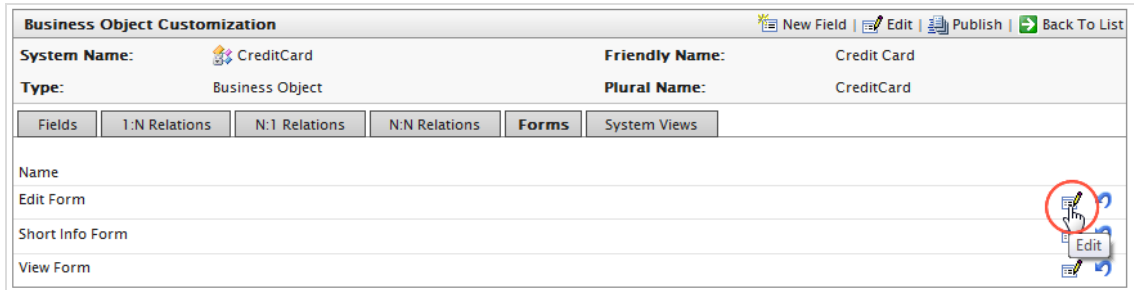
The screenshot shows a dialog box titled "New Credit Card" with a close button (X) in the top right corner. The dialog is divided into an "Overview" section and a bottom area with "OK" and "Cancel" buttons. The "Overview" section contains the following fields:

Type:	Visa	Expiration Month:	[No value]
Last Four Digits:	<input type="text"/>	Expiration Year:	[No value]
Card Number:	<input type="text"/>		
Security Code:	<input type="text"/>		
Customer Service Phone Number:	<input type="text"/>		

The "OK" button has a floppy disk icon, and the "Cancel" button has a green arrow icon.

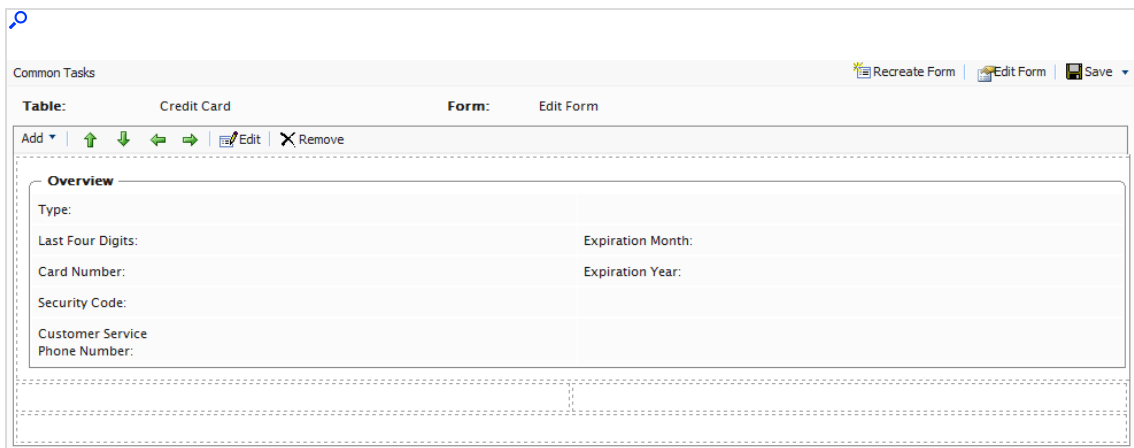
Editing a form

1. Select a **Business Object** and then click the **Forms** tab to see the list of associated forms.



The screenshot shows the 'Business Object Customization' interface for the 'CreditCard' system. At the top, there are navigation links: 'New Field', 'Edit', 'Publish', and 'Back To List'. Below this, the 'System Name' is 'CreditCard' and the 'Type' is 'Business Object'. The 'Friendly Name' is 'Credit Card' and the 'Plural Name' is 'CreditCard'. A set of tabs includes 'Fields', '1:N Relations', 'N:1 Relations', 'N:N Relations', 'Forms', and 'System Views', with 'Forms' currently selected. A list of forms is shown: 'Name', 'Edit Form', 'Short Info Form', and 'View Form'. To the right of the 'Edit Form' entry, there is a red circle highlighting an 'Edit' button icon.

2. Click **Edit** next to the form you want. The form customization window appears.

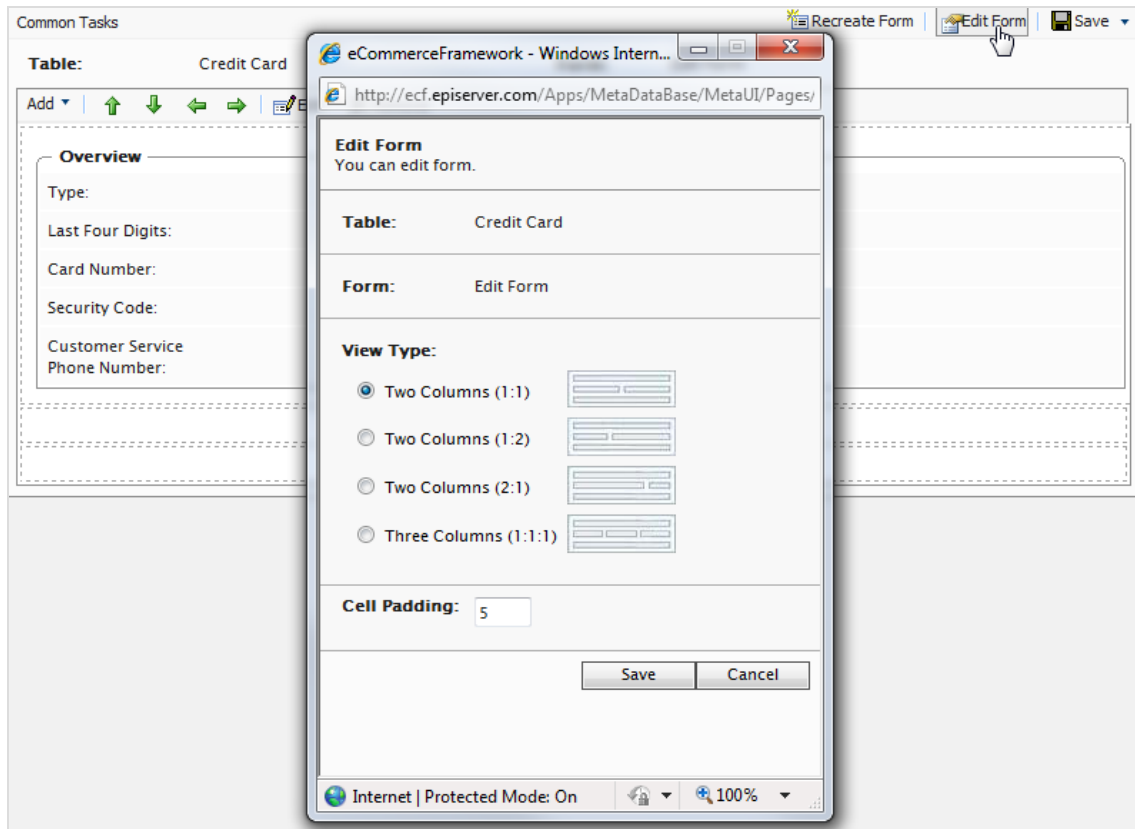


The screenshot shows the 'Form customization window' for the 'Credit Card' form. At the top, there are navigation links: 'Recreate Form', 'Edit Form', and 'Save'. Below this, the 'Table' is 'Credit Card' and the 'Form' is 'Edit Form'. A toolbar contains 'Add', 'Up', 'Down', 'Left', 'Right', 'Edit', and 'Remove' icons. The main area is titled 'Overview' and contains a table with the following fields:

Type:	
Last Four Digits:	Expiration Month:
Card Number:	Expiration Year:
Security Code:	
Customer Service Phone Number:	

Editing a form's layout

1. Click **Edit Form**.

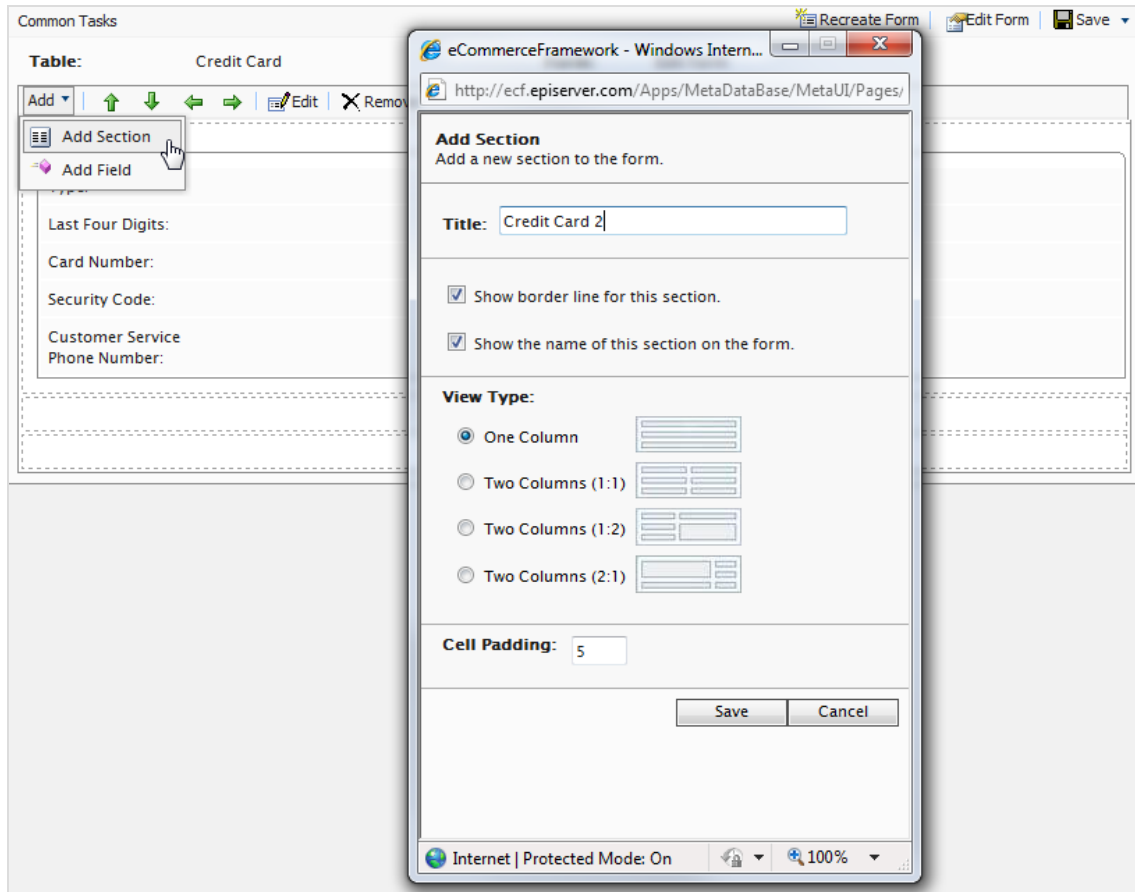


- a. Select a **View Type** (layout of the form).
 - Two Columns (1:1)
 - Two Columns (1:2)
 - Two Columns (2:1)
 - Three Column (1:1:1)
 - b. Enter in a pixel value for the **Cell Padding** (spaces between each cell).
2. Click **Save**.

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**.

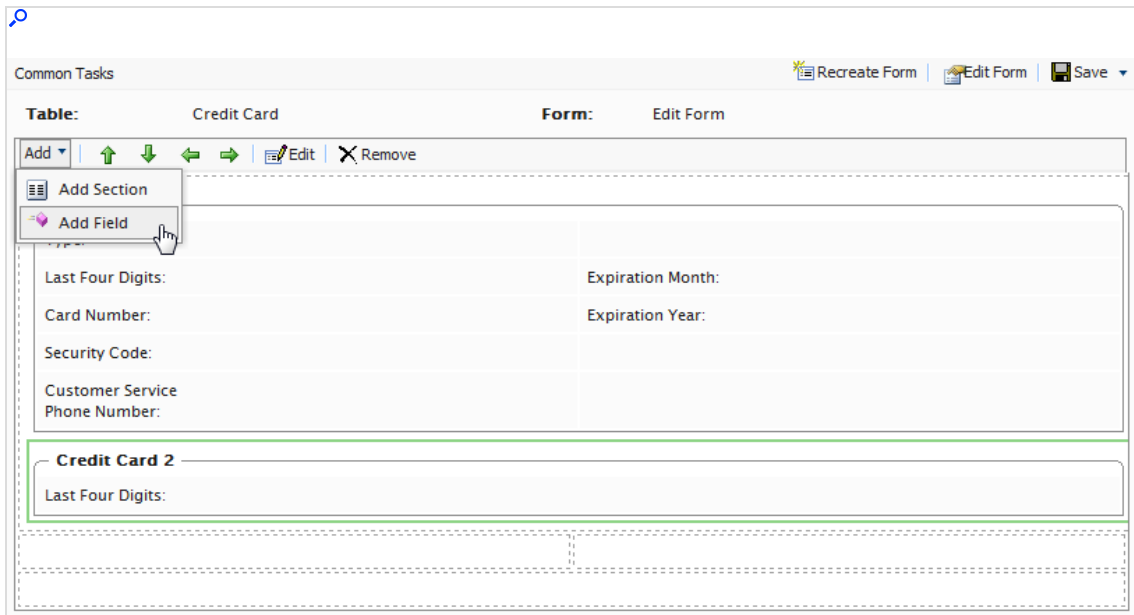
Editing a section

You can edit a section by selecting a section and click **Edit**.

The screenshot shows a web interface titled "Common Tasks". At the top right, there are three buttons: "Recreate Form", "Edit Form", and "Save". Below the title, there are two labels: "Table: Credit Card" and "Form: Edit Form". A toolbar contains several icons: "Add", "Up", "Down", "Left", "Right", "Edit" (highlighted with a mouse cursor), and "Remove". The main content area is divided into two sections. The first section, titled "Overview", contains a table with the following fields: Type, Last Four Digits, Card Number, Security Code, Customer Service Phone Number, Expiration Month, and Expiration Year. The second section, titled "Credit Card 2", is currently empty. The interface uses dashed lines to indicate the boundaries of the sections.

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 settings.

The screenshot shows the 'Common Tasks' interface for editing a form. At the top, there are buttons for 'Recreate Form', 'Edit Form', and 'Save'. Below this, the 'Table' is identified as 'Credit Card' and the 'Form' as 'Edit Form'. A menu bar contains 'Add', directional arrows (up, down, left, right), an 'Edit' button (highlighted with a mouse cursor), and a 'Remove' button. The form content is organized into sections: 'Overview' and 'Credit Card 2'. The 'Overview' section contains a table with the following fields:

Type:	
Last Four Digits:	Expiration Month:
Card Number:	Expiration Year:
Security Code:	
Customer Service Phone Number:	

The 'Credit Card 2' section contains a single field: 'Organization:'.

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.

The screenshot shows the 'Common Tasks' window for editing a 'Credit Card' form. The window title is 'Common Tasks' and it has buttons for 'Recreate Form', 'Edit Form', and 'Save'. The 'Table:' is 'Credit Card' and the 'Form:' is 'Edit Form'. A toolbar contains 'Add', 'Up', 'Down', 'Left', 'Right', 'Edit', and 'Remove' buttons. The 'Remove' button is highlighted with a mouse cursor. The form content includes an 'Overview' section with fields for 'Type', 'Last Four Digits', 'Card Number', 'Security Code', and 'Customer Service Phone Number', and an 'Expiration Month' and 'Expiration Year' field. Below the overview is a section titled 'Credit Card 2' with an 'Organization' field. The 'Remove' button is located at the top right of the form area, next to the 'Edit' button.

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.

The screenshot shows the 'Common Tasks' window for editing a 'Credit Card' form. The window title is 'Common Tasks' and it has buttons for 'Recreate Form', 'Edit Form', and 'Save'. The 'Table:' is 'Credit Card' and the 'Form:' is 'Edit Form'. A toolbar contains 'Add', 'Up', 'Down', 'Left', 'Right', 'Edit', and 'Remove' buttons. The 'Recreate Form' button is highlighted with a mouse cursor. The form content is identical to the previous screenshot, including the 'Overview' section and the 'Credit Card 2' section.

- Click **OK** to recreate the form. After you confirm, the fields clear from the form except for the required field.

The screenshot shows a software interface titled "Common Tasks". At the top right, there are three buttons: "Recreate Form", "Edit Form", and "Save". Below the title bar, there are two tabs: "Table: Credit Card" and "Form: Edit Form". Under the "Table" tab, there is a toolbar with icons for "Add", "Up", "Down", "Left", "Right", "Edit", and "Remove". The main area shows a form titled "Credit Card" with a single text input field labeled "Card Number:". A mouse cursor is pointing at the "Card Number" field. Below the form, there are several dashed lines indicating a table structure.

Relating business objects

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

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

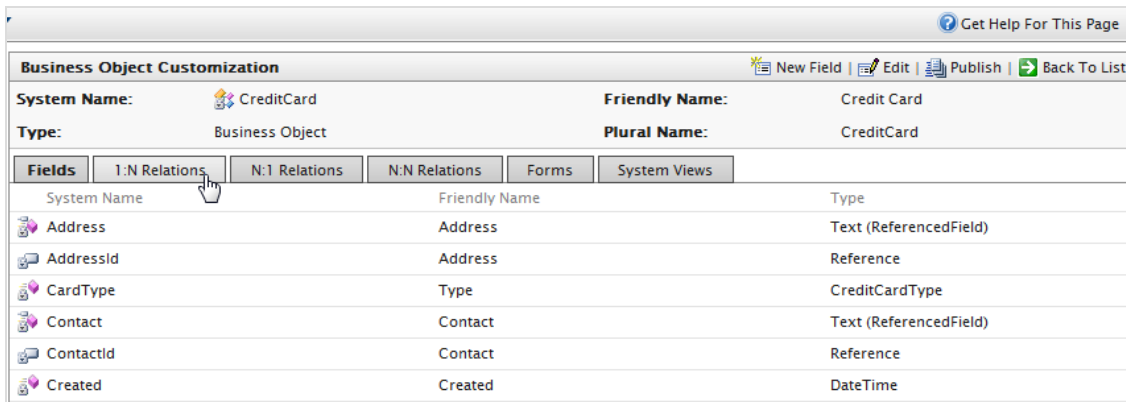
Note: This topic is intended for administrators and developers with administration access rights in Optimizely.

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.

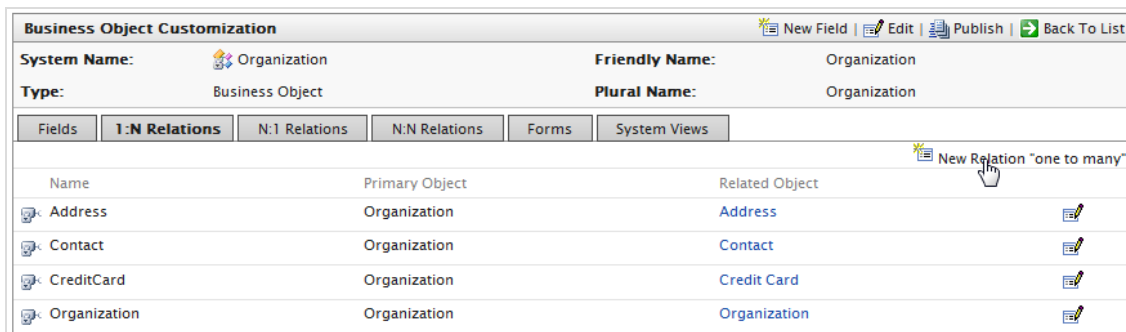
In the following example, 1 = Organization and N = Related Objects such as Address, Contact, CreditCard and so on.

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.

Relation 1:N

General Info

Primary Object: Organization

Related Object: Address

Object "Address"

Field Name: Organization

Friendly Name: Organization

Allow Nulls

Add Field To:

Edit Form

View Form

Short Info Form

Object "Organization"

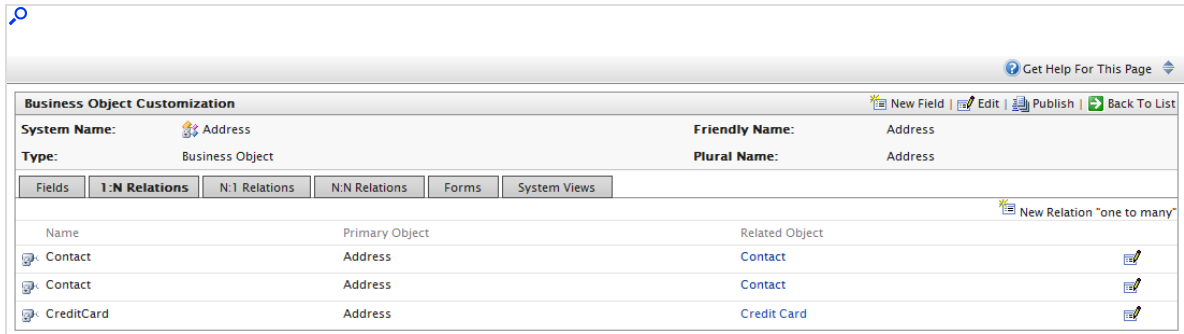
Display Region: [Not Set]

Save Cancel

- **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**.



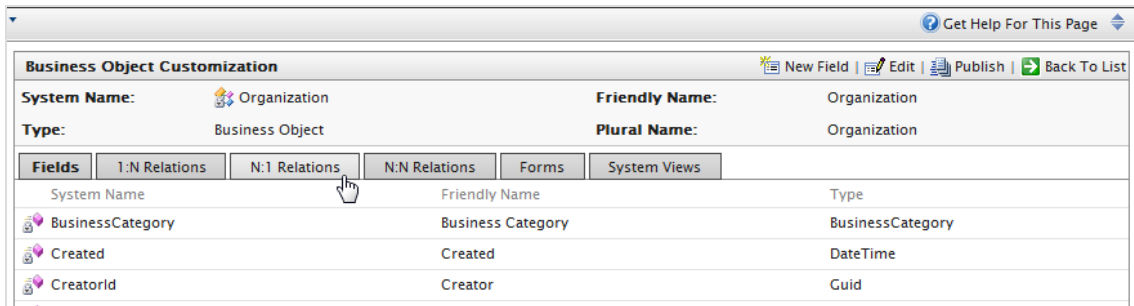
Adding a many-to-one relationship

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

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.

- To create **many-to-one relationships**, select a business object and click the **N:1 Relations** tab.



- Click **New Relation "Many to one"** to create a new relationship.

Business Object Customization New Field | Edit | Publish | Back To List

System Name: Organization **Friendly Name:** Organization
Type: Business Object **Plural Name:** Organization

Fields | 1:N Relations | **N:1 Relations** | N:N Relations | Forms | System Views

System Name	Name	Primary Object	Related Object	
ParentId	Parent	Organization	Organization	
PrimaryContactId	Primary Contact	Contact	Organization	

New Relation "many to one"

- 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.)

Relation N:1

General Info

Primary Object: Address ▼
Related Object: Organization

Object "Organization"

Field Name: Address
Friendly Name: Address

Allow Nulls

Add Field To:

Edit Form
 View Form
 Short Info Form
 System View (All organizations)

Object "Address"

Display Region: [Not Set] ▼

- **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

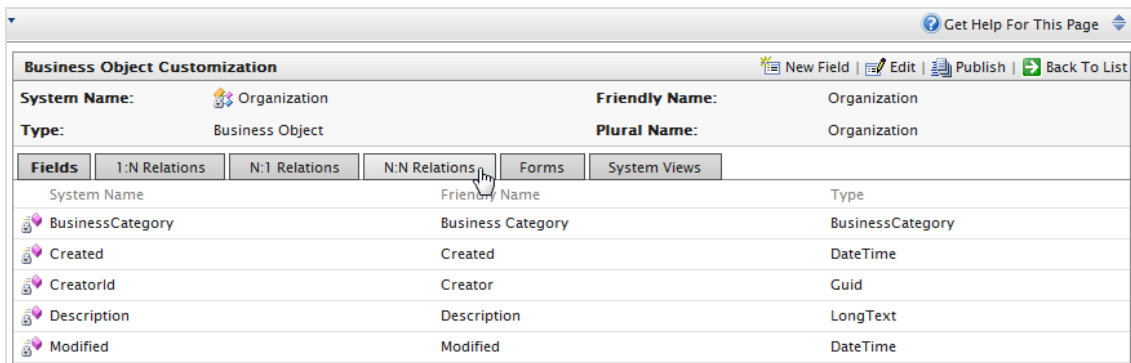


Note: This topic is intended for administrators and developers with administration access rights in Optimizely.

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.

The screenshot shows the 'Business Object Customization' window for the 'Organization' system. The 'Type' is 'Business Object'. The 'N:N Relations' tab is active. A button labeled 'New Relation "many to many"' is visible in the bottom right corner, with a mouse cursor pointing to it.

3. Fill in the **Relation N:N** dialog box.

The 'Relation N:N' dialog box is shown with the following fields:

- General Info:**
 - Current Object: SKUs
 - Related Object: SKU_Warehouse
 - Relation Name: SKUs_Warehouse
 - Friendly Name: SKUsSKUs Warehouses
- Current Object (SKUs):**
 - Display Region: Information
 - Display Text: SKUs Warehouses
 - Display Order: 10000
- Related Object (SKU_Warehouse):**
 - Display Region: Information
 - Display Text: SKUs
 - Display Order: 10000

Buttons: Save, Cancel

- **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



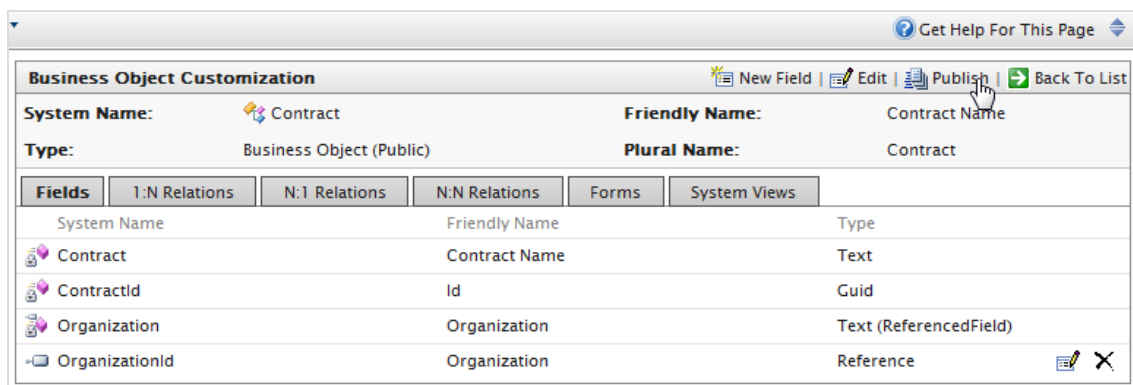
Note: This topic is intended for administrators and developers with administration access rights in Optimizely.

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.

Dashboard	0	Display Region:	< nothing is selected >
Customer Management	40	Display Text:	Contract
Catalog Management	60	Display Order:	10000
Order Management	80	Client Script:	CSManagementClient.ChangeBafView('Contract', 'Lis
Marketing	100	Access Permissions:	businessfoundation:contract.list:permission
Asset Management	120	Item Icon:	<input type="text"/> <input type="button" value="Browse..."/>
Reporting	130		
Administration	200		

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 Optimizely.

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**.

	Title	Order
	Dashboard	0
	Home	10
	Customer Management	40
	Organizations	30
	Contacts	40
	Roles	50
	Gift Cards	10000
	Catalog Management	60
	Catalog Entry Search	10
	Catalog Batch Update	20
	Catalogs	30
	Templates	40
	Order Management	80
	Order Search	10

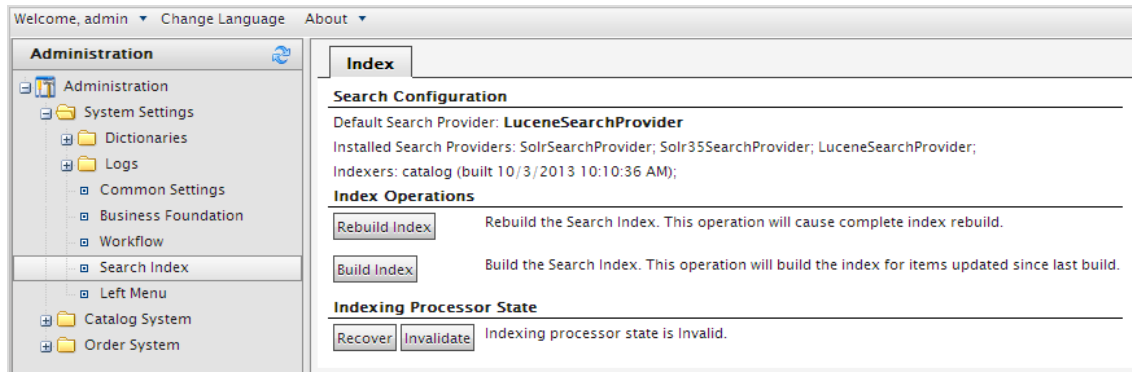
Updating a catalog search index

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

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 Optimizely.

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).

The screenshot shows the Episerver Commerce Administration interface. On the left is a navigation menu with categories like Administration, Catalog System, Order System, Dashboard, Customer Management, Catalog Management, Order Management, Marketing, Asset Management, and Reporting. The main area displays a table of items with columns for Title and Order. A mouse cursor is hovering over the 'Add' button above the table.

Title	Order
Dashboard	0
Home	10
Customer Management	40
Organizations	30
Contacts	40
Roles	50
Gift Cards	10000
Catalog Management	60
Catalog Entry Search	10
Catalog Batch Update	20
Catalogs	30
Templates	40
Order Management	80
Order Search	10
Purchase Orders	20
Today	10
This Week	20
This Month	30
All	40
Purchase Orders By Status	30

Page Size: 20 (83 items) | Page 1 2 3 4 5

A dialog box appears for publication settings.

Adding

Dashboard	0
Customer Management	40
Catalog Management	60
Order Management	80
Marketing	100
Asset Management	120
Reporting	130
Administration	200

Display Region: Customer Management

Display Text: Contracts

Item Link:

Display Order: 10000

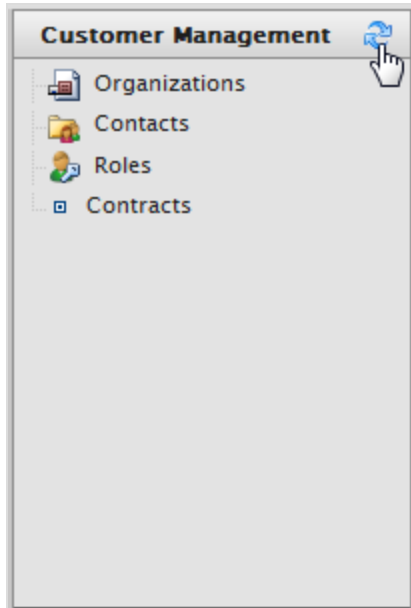
Access Permissions:

Item Icon:

- **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**.

A screenshot of a dialog box titled "Add". It contains a table with three columns: "Title", "Order", and an unlabeled column. The table lists several menu items, each with a pencil icon in the first column. The "Contracts" item has a mouse cursor hovering over it, and an "Edit" button is overlaid on the pencil icon.

	Title	Order
	Dashboard	0
	Home	10
	Customer Management	40
	Organizations	30
	Contacts	40
	Roles	50
	Contracts	10000
	Catalog Management	60
	Catalog Entry Search	10

If the left menu item was created via the **Left Menu** page, the following dialog box appears.

Editing [X]

Display Text:

Item Link:

Display Order:

Access Permissions:

Item Icon:

If the left menu item node was created using **Business Foundation**, the following dialog box appears.

Editing [X]

Display Text:

Client Script:

Display Order:

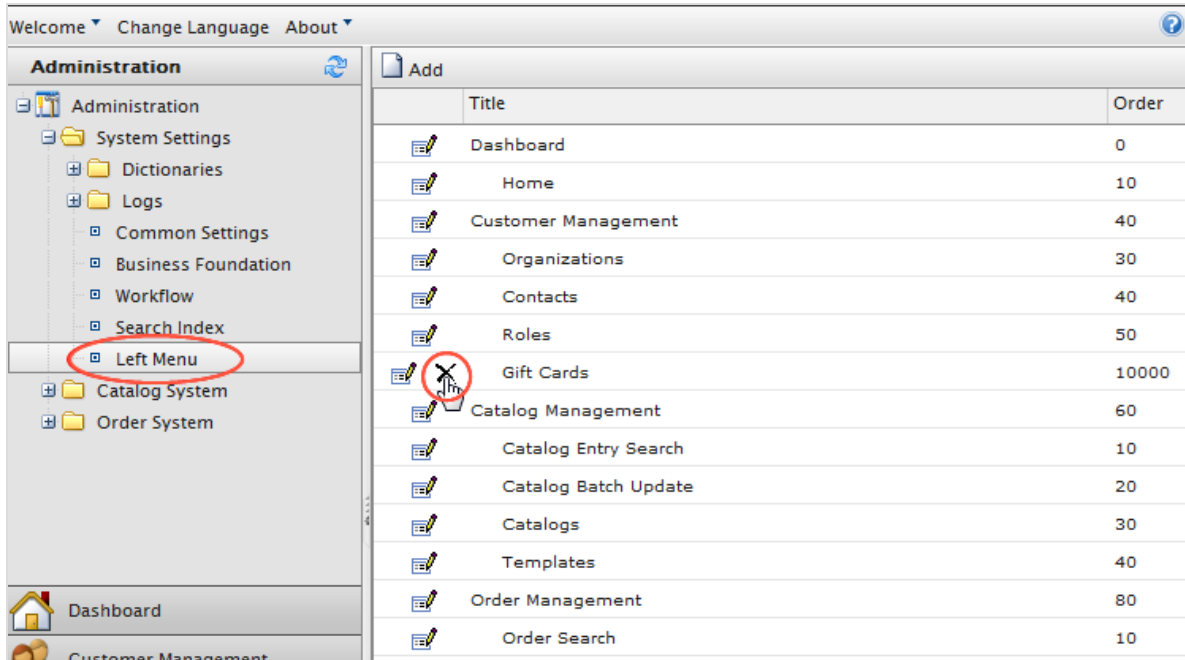
Access Permissions:

Item Icon:

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**.

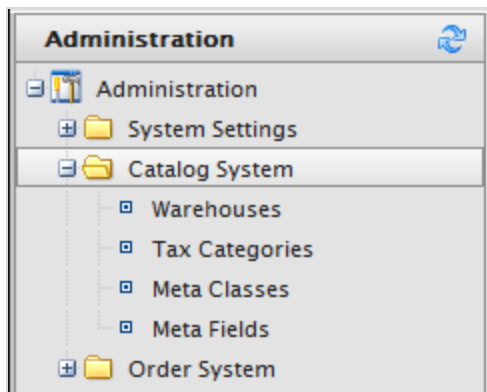
To delete a left menu item, click **X**.



Catalog system administration

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

Go to **Administration > Catalog System** to set up [warehouses](#), [tax categories](#), and [catalog specific meta-fields and meta-classes](#).

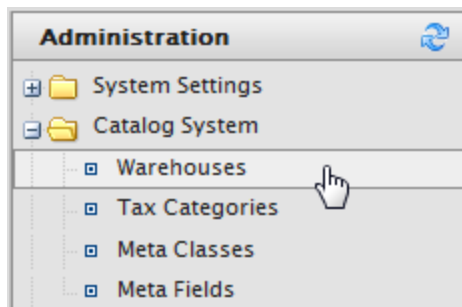


Warehouses

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

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.

Overview | Address

Name:

* Code:

Sort Order:
The sort order for the category entry.

Available: Yes No

Is Primary: Yes No

Is Fulfillment Center: Yes No
Orders can be placed from this warehouse for outgoing shipments.

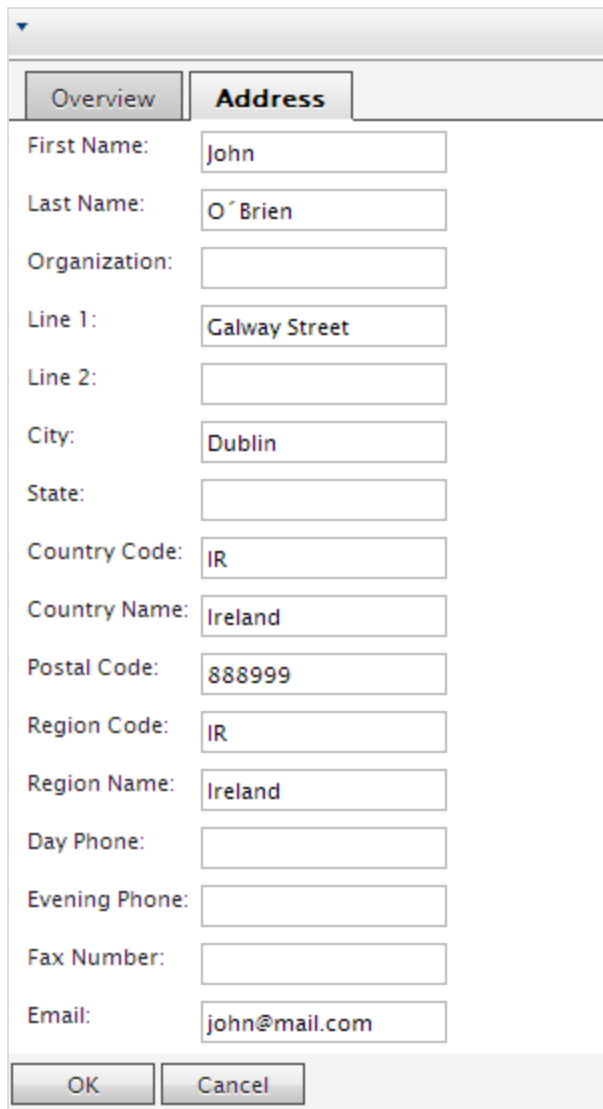
Is Pickup Location: Yes No
Orders can be placed from this warehouse for in-store pickups.

Is Delivery Location: Yes No
Warehouse can be used as a delivery location (i.e. for future in-store pickups).

OK Cancel

- **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.



The screenshot shows a software window with a dropdown arrow at the top left. Below the window title bar are two tabs: "Overview" and "Address". The "Address" tab is selected and contains the following fields:

First Name:	John
Last Name:	O'Brien
Organization:	
Line 1:	Galway Street
Line 2:	
City:	Dublin
State:	
Country Code:	IR
Country Name:	Ireland
Postal Code:	888999
Region Code:	IR
Region Name:	Ireland
Day Phone:	
Evening Phone:	
Fax Number:	
Email:	john@mail.com

At the bottom of the form are two buttons: "OK" and "Cancel".

5. Click **OK** to save your changes. The warehouse appears in the list.

Deleting a warehouse

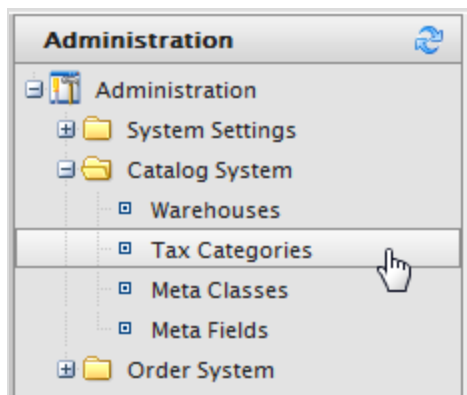
Select the warehouse and select **More Actions > Delete Selected**. Click **OK** to confirm.

Tax categories

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

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 Optimizely.

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.

Select	Sort	Name
<input type="checkbox"/>	<input type="text"/>	Return form number
<input type="checkbox"/>	<input type="text"/>	PO Number
<input type="checkbox"/>	<input type="text"/>	Expiration Date
<input type="checkbox"/>	<input type="text"/>	Parent Order Id
<input type="checkbox"/>	<input type="text"/>	Card type
<input type="checkbox"/>	<input type="text"/>	Expiration Month
<input type="checkbox"/>	<input type="text"/>	Expiration Year

- **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.

ID	Name	Type	Multi-Language	Compare	Search
167	ABV	Decimal	False	True	True
168	Closure	ShortString	True	True	True
169	Color	ShortString	True	True	True
170	Description	LongHtmlString	True	False	True
171	DisplayName	ShortString	True	True	True
172	ExtendedDescription	LongHtmlString	True	False	True
173	Margin	Decimal	False	True	False
174	Maturity	ShortString	True	True	True
175	Organic	Boolean	False	True	False
176	PrimaryImage	ImageFile	False	False	False
177	RecommendBoost	Integer	False	False	False
178	Region	ShortString	True	True	True
179	Size	Float	False	True	True

You can also select **Create New > New Meta Field** on the **Meta Classes** page.


3. Enter **Meta Fields** details.

The screenshot shows a configuration window for a meta-field. The fields are as follows:

- Name:** Wooden
- Friendly Name:** Wooden
- Description:** Wooden
- Type:** Short String
- Supports Multiple Languages
- Use in comparing
- Allow Null Values
- Search Properties:**
 - Allow Search
 - Enable Sorting Search Results
 - Include Values in Search Results
 - Tokenize
 - Include in the Default Search

- **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.

Create New ▼
Import/Export ▼

Element:

Type:

Name:

Friendly Name:

Description:

Barrel

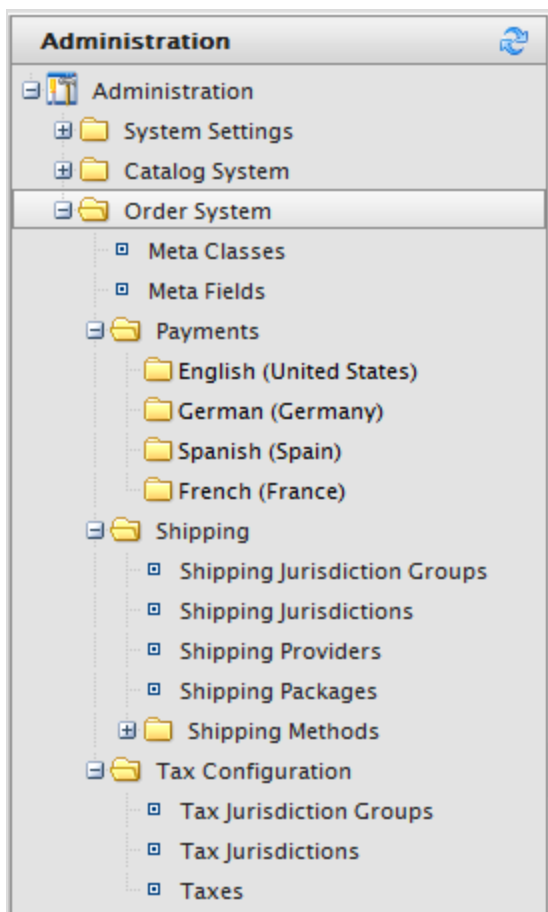
Select	Sort	Name
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	Return form number
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	PO Number
<input type="checkbox"/>	<input type="text"/>	Expiration Date
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	Parent Order Id
<input type="checkbox"/>	<input type="text"/>	Card type
<input type="checkbox"/>	<input type="text"/>	Expiration Month

5. Click **OK**.

Order system administration

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

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 Optimizely.

You need to create three components for payment in Optimizely Commerce. You can also give customers several payment options and customize methods for [specific markets](#).

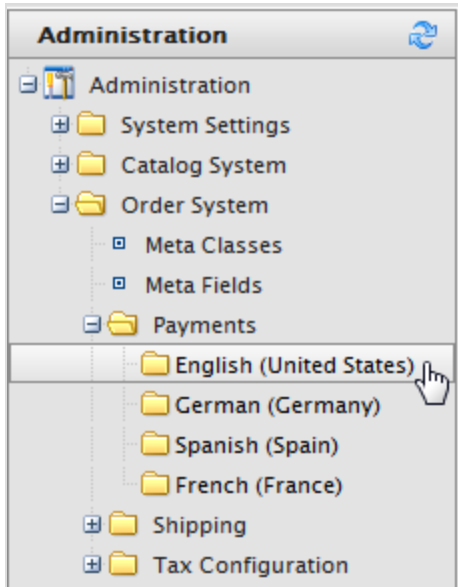
- **Payment type.** A meta-class that contains the properties for a particular payment type. For example, a credit card payment type contains credit card number, card expiration date, and card type. Optimizely provides the following payment types:
 - Payment by phone
 - Exchange payment
 - Credit card payment
 - Other Payment

Additional payment providers are available as modules for Optimizely 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.



Get Help For This Page							
New More Actions							
	Name	IsActive	IsDefault	Ordering	Created	Last Modified	
<input type="checkbox"/>	Gift Card	True	False	0	2/22/2012 5:08:21 AM	2/22/2012 5:08:21 AM	
<input type="checkbox"/>	Pay By Credit Card	True	False	2	4/20/2010 2:00:00 AM	4/20/2010 2:00:00 AM	
<input type="checkbox"/>	ExchangePayment	False	False	2	4/20/2010 2:00:00 AM	4/20/2010 2:00:00 AM	
<input type="checkbox"/>	Pay By Phone	True	True	2	4/20/2010 2:00:00 AM	4/20/2010 2:00:00 AM	
<input type="checkbox"/>	Credit on Account	True	False	100	2/22/2012 5:08:21 AM	2/22/2012 5:08:21 AM	

2. On the **Payment Methods** window, click **New** to create a new payment method. The **Payment Method Edit** screen appears.

The screenshot shows a configuration window for a payment gateway. The 'Overview' tab is selected. The fields are as follows:

- ID:** 53c9ea59-805b-4710-9be7-05b2ebac431d
- Name:** Pay By Phone
- Description:** Pay by phone payment
- System Keyword:** Generic
- Language:** English
- Class Name:** Mediachase.Commerce.Plugins.Payment.GenericPaymentGateway
- Payment Class:** (none)
- Sort Order:** 2
- IsActive:** Yes (selected)
- IsDefault:** Yes (selected)
- Supports Recurring:** Yes (selected)

The **Restricted Shipping Methods** section contains two lists:

- Available Shipping Methods:** Default Shipping, Online Download
- Chosen Shipping Methods:** (Empty)

Control buttons between the lists are: Add ->, Add All ->>, <- Remove, and <<- Remove All. At the bottom are OK and Cancel buttons.

- **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.**

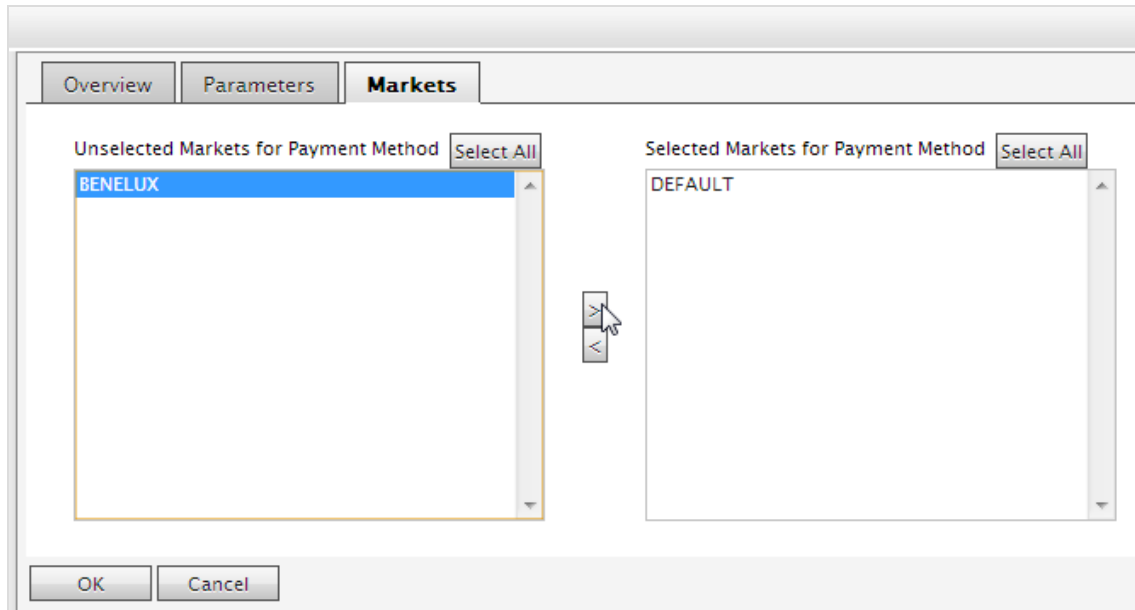
Restricted Shipping Methods

Available Shipping Methods		Chosen Shipping Methods
Default Shipping Online Download	Add -> Add All ->> <- Remove <<- Remove All	

Restricted Shipping Methods

Available Shipping Methods		Chosen Shipping Methods
Online Download	Add -> Add All ->> <- Remove <<- Remove All	Default Shipping

3. On the **Markets** tab, select the markets where the payment method are available. [You must define a market](#) before it can be selected.

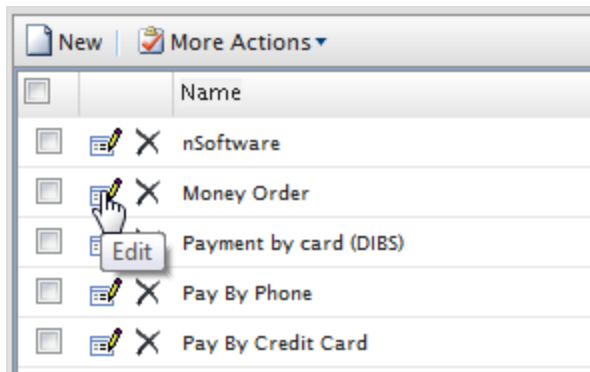


4. Click **OK**. The payment method appears in the list of Payment Methods.

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

Optimizely 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.

Overview Parameters

ID:

Name: nSoftware

Description: nSoftware

System Keyword: ICharge

Language: select language

Class Name: Mediachase.Commerce.Plugins.Payment.ICharge.IChargeGateway

Sort Order: 0

IsActive: Yes No

IsDefault: Yes No

Supports Recurring: Yes No

Restricted Shipping Methods

Available Shipping Methods

Default Shipping
Online Download

Chosen Shipping Methods

Add ->
Add All ->>
<- Remove
<<- Remove All

OK Cancel

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.

Overview Parameters

Configure IBiz E-Payment Integrator Component

Gateway:

Get IBiz E-Payment Integrator from www.nsoftware.com. You will find more documentation on how to configure it there also.

Configuration Parameters

Payment Options:

*Merchant Login:

Merchant Password:

Transaction Key:

Secret Hash:

Payment Gateway URL (used for testing):

OK Cancel

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

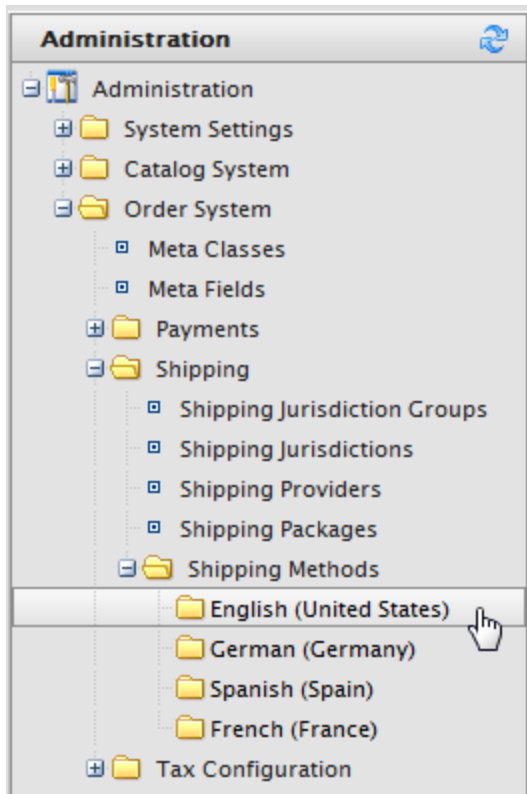
Note: This topic is intended for administrators and developers with administration access rights in Optimizely.

Shipping is the physical delivery of product to e-commerce customers. Just as for [payments](#), you can set up shipping [methods](#) and [providers](#). Optimizely 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 Optimizely 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 Optimizely.

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

Optimizely 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.

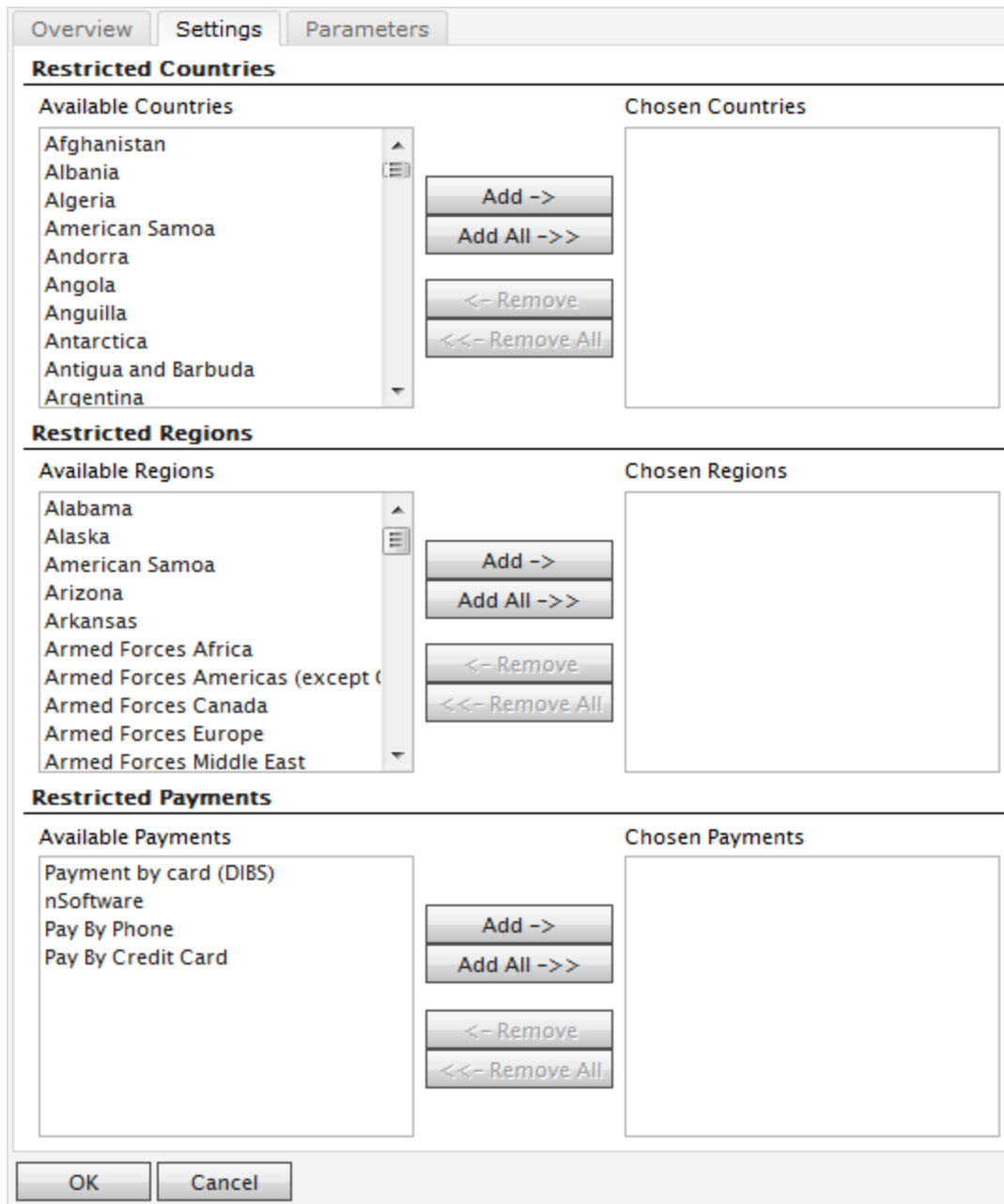
The screenshot shows a configuration window for a shipping method. The 'Overview' tab is active. The fields are as follows:

- ID:** a1ca1bca-6fbf-4b6f-b01f-bbf3df23a02a
- Name:** Default Shipping
- Friendly Name:** Ground Shipping
- Description:** Calculates shipping based on weight and zone.
- Provider:** Weight/Jurisdiction Gateway
- Language:** English (United States)
- Base Price:** 2.00
- Currency:** US dollar
- IsActive:** Yes (selected)
- IsDefault:** Yes (selected)
- Sort Order:** 0

Buttons: OK, Cancel

- **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. Optimizely 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.

Configure Price Per Weight for Jurisdiction Group

Jurisdiction Group:

Weight: or more

Price:

Start Date:

End Date:

Group Name	Weight	Price	Start Date	End Date	Edit	Delete
United States	0 or more	10	10/8/2008 12:00:00 AM	10/8/2020 12:00:00 AM	Modify	Delete

- **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 Optimizely.

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 Optimizely.

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 Optimizely 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
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. Optimizely 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 Optimizely.

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. Go to **Administration > Order System > Meta Classes**. The **Meta Classes** page appears.
2. Select **Create New > New Meta Class** and fill in the fields.

The screenshot shows the 'Administration' interface with the 'Meta Classes' section selected. The 'Create New' dropdown menu is open, showing 'New Meta Class' as the selected option. The form fields are filled as follows:

- Name:** PurchaseOrder
- Friendly Name:** Purchase Order
- Description:** Contains orders that has been submitted into the system
- Type:** Purchase Order

Below the form, a table lists available meta-fields:

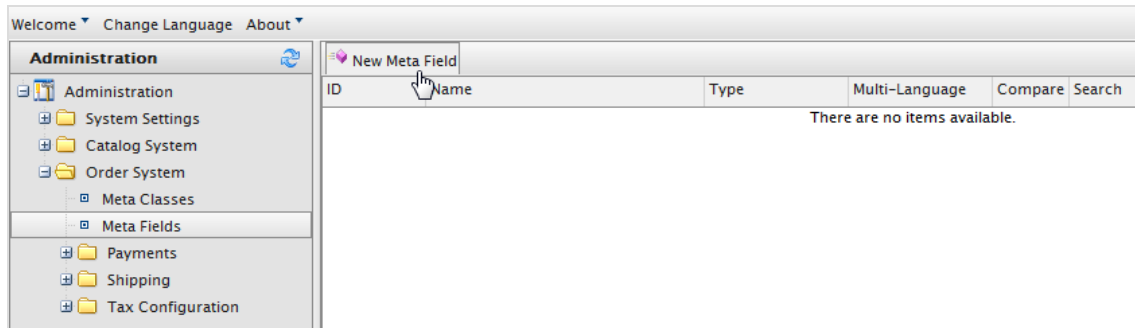
Select	Sort	Name
<input type="checkbox"/>		Return form number
<input checked="" type="checkbox"/>	0	PO Number
<input checked="" type="checkbox"/>	0	Expiration Date
<input checked="" type="checkbox"/>	0	Parent Order Id

- **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.

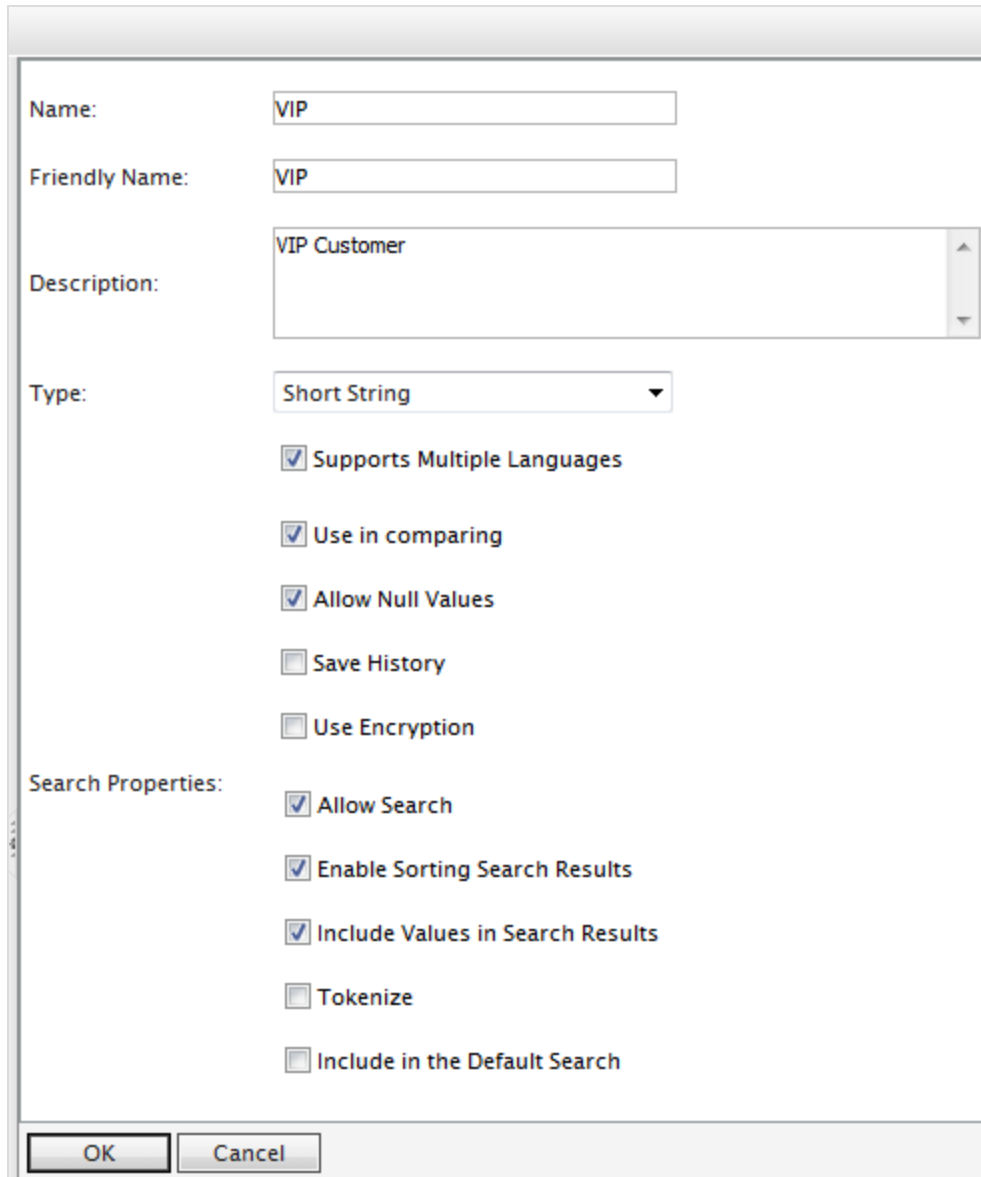
Creating an order meta-field

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.



The screenshot shows a configuration dialog box for a meta-field. It contains the following fields and options:


- Name:** Text input field containing "VIP".
- Friendly Name:** Text input field containing "VIP".
- Description:** Text area containing "VIP Customer".
- Type:** Dropdown menu set to "Short String".
- Supports Multiple Languages
- Use in comparing
- Allow Null Values
- Save History
- Use Encryption
- Search Properties:**
 - Allow Search
 - Enable Sorting Search Results
 - Include Values in Search Results
 - Tokenize
 - Include in the Default Search

At the bottom of the dialog are "OK" and "Cancel" buttons.

- **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.

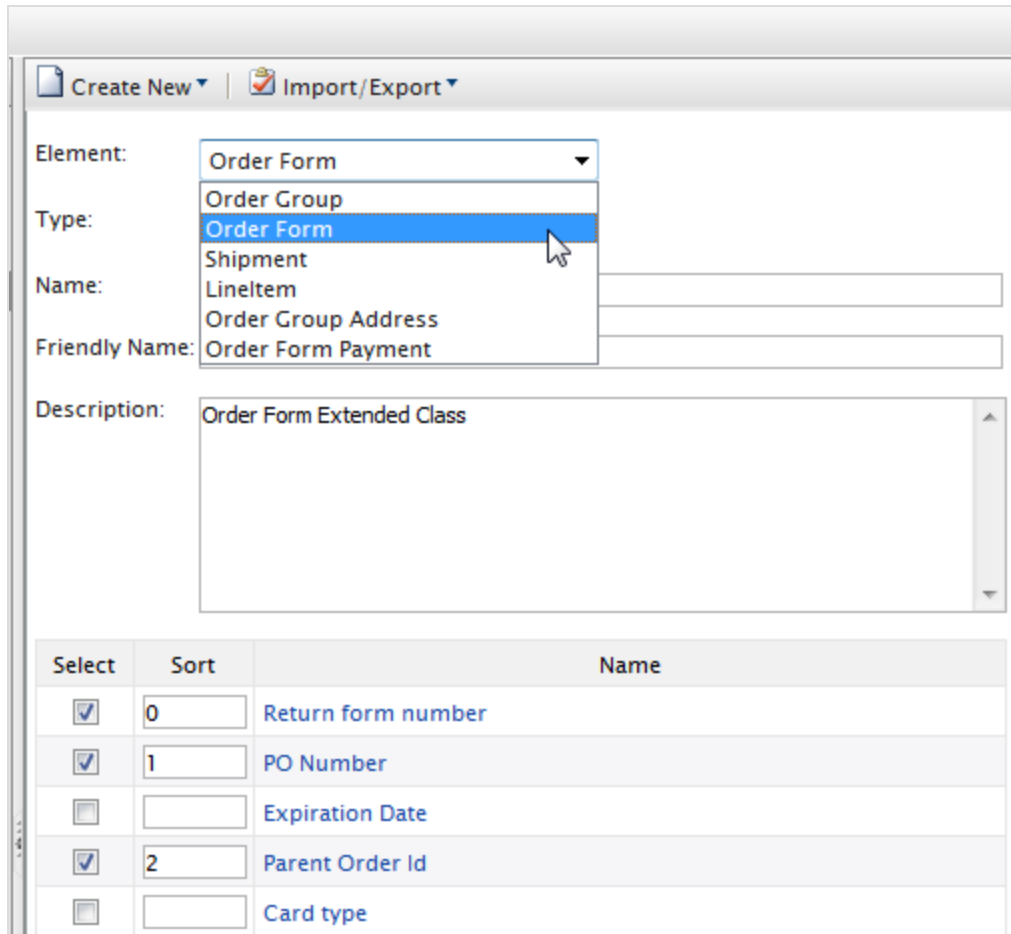
4. Select **OK**. The newly added meta-fields are listed in the meta-fields list.



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.



Create New | Import/Export

Element: Order Form

Type: Order Group, Order Form, Shipment, Linitem, Order Group Address, Order Form Payment

Name:

Friendly Name:

Description: Order Form Extended Class

Select	Sort	Name
<input checked="" type="checkbox"/>	0	Return form number
<input checked="" type="checkbox"/>	1	PO Number
<input type="checkbox"/>		Expiration Date
<input checked="" type="checkbox"/>	2	Parent Order Id
<input type="checkbox"/>		Card type

5. Click **OK**.

Scheduled jobs

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

A scheduled job performs a specific task automatically when set to a date and time. Scheduled jobs can be run automatically, or manually from the administration view in Optimizely CMS, see Scheduled jobs in the CMS Administrator User Guide. See Optimizely World for [technical details about scheduled jobs](#).

Note: Running scheduled jobs can significantly affect website performance, and these jobs should be run at times of low usage if possible. Ensure you fully understand the impact of a job before running it.

Built-in scheduled jobs

The following Commerce-specific scheduled jobs are available by default in the CMS administration view. *Customized* modules and add-ons may have their own specific scheduled jobs not described here. See the technical documentation for each module to find out more.

Remove expired carts

Removes carts that are *expired*, that is, not accessed for a specified number of days. The default is **30**. This value can be configured through code, see Optimizely World for [technical details](#).

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 version 9. See Optimizely 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 code. See Optimizely World for [technical details](#).

Release shipment

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, when the job is activated, order shipments are released *one day* after an order is placed. A developer can change the default value in code. See Optimizely World for [technical details](#).

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 Optimizely World for [technical details](#).

Maintain database indexes

To reduce fragmentation in the CMS and Commerce database indexes, this job rebuilds or reorganizes them. See Optimizely World for [technical details](#).

Collect subscription data for reports

This job collects subscription data, ensuring that recurring payments are regularly generated as a background process. Used for payment plans, such as magazine or grocery subscriptions.

Collect order data for reports

This job compiles the data used in the [Sales By Day report](#).

Collect orders per promotion statistics

This job calculates statistics for displaying promotion (discount) usage for orders associated with campaigns in the **Marketing** view. See Optimizely World for [technical details](#).

Other scheduled jobs

These jobs are available if you have Optimizely Personalization or Optimizely Campaign installed on your website.

Export product feed

Exports the entire product feed (catalog) for Optimizely Product Recommendations to provide updated information to the recommendation service. This job includes the deletion of products and edits to asset and inventory information.

Export product feed incrementally

Exports the product feed (catalog) to Optimizely Product Recommendations incrementally. This job updates product changes without exporting the entire catalog.

This job is faster than the full export job since changes only include added and updated products. However, the incremental export job does not replace the full export job, since deletion of products and edits to asset and inventory information are not included. See Optimizely World for [technical details](#).

Export product data to Optimizely Campaign

This job collects product data and saves it to a .csv file for transfer to Optimizely Campaign. See [Commerce-Campaign integration](#) on Optimizely World for more details.

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 Optimizely 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.

The 'Edit link' dialog box includes the following fields and options:

- Link title: [Text input]
- Open in: [Dropdown]
- Language: Automatic (default) [Dropdown]
- Page: [Radio button] [Text input] [...]
- Media: [Radio button] [Text input] [...]
- Catalog content: [Radio button] [Text input] [...]
- Marketing content: [Radio button] [Text input] [...]
- E-mail: [Radio button] [Text input]
- External link: [Radio button] [Text input]
- Anchor: [Radio button] [Dropdown]
- Remaining Url: [Text input]

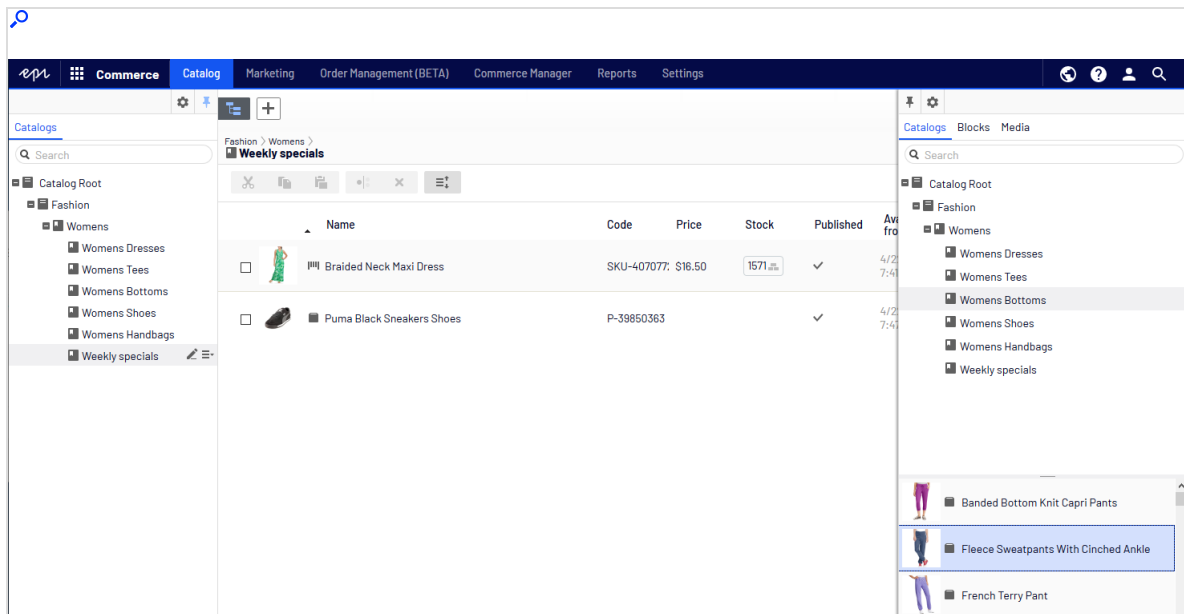
- Publish changes directly on the website, or schedule it for later publishing.

The 'Category' configuration page shows the following structure:

- Category: ... > Departments > Media > Books > Books-Art
- Name: Books-Nature
- Suggested Types:
 - Product list: Displays a list of products.
 - Fashion:
 - Fashion store: Display fashion store.
 - Fashion category: Displays a fashion category which consists fashion categories and products.
 - Media:
 - Media store: Display media store.
 - Media category: Displays a media category which consists media categories and products. (Highlighted)

Catalogs gadget

You can access the **Catalogs** gadget in the CMS and Optimizely 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.

Optimizely Commerce-specific gadgets

This legacy section is being retired. If you want to read the Optimizely 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 Optimizely Commerce user interface. See [Multi-language management](#).

Personalized content

The personalization feature in Optimizely 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](#).

Optimizely Search & Navigation and best bets for catalog content

If you have Optimizely Search & Navigation installed on your website, you can promote content in your product catalog by adding best bets to the search results. See [Optimizely Search & Navigation](#).

Managing languages in Optimizely 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 Optimizely 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.

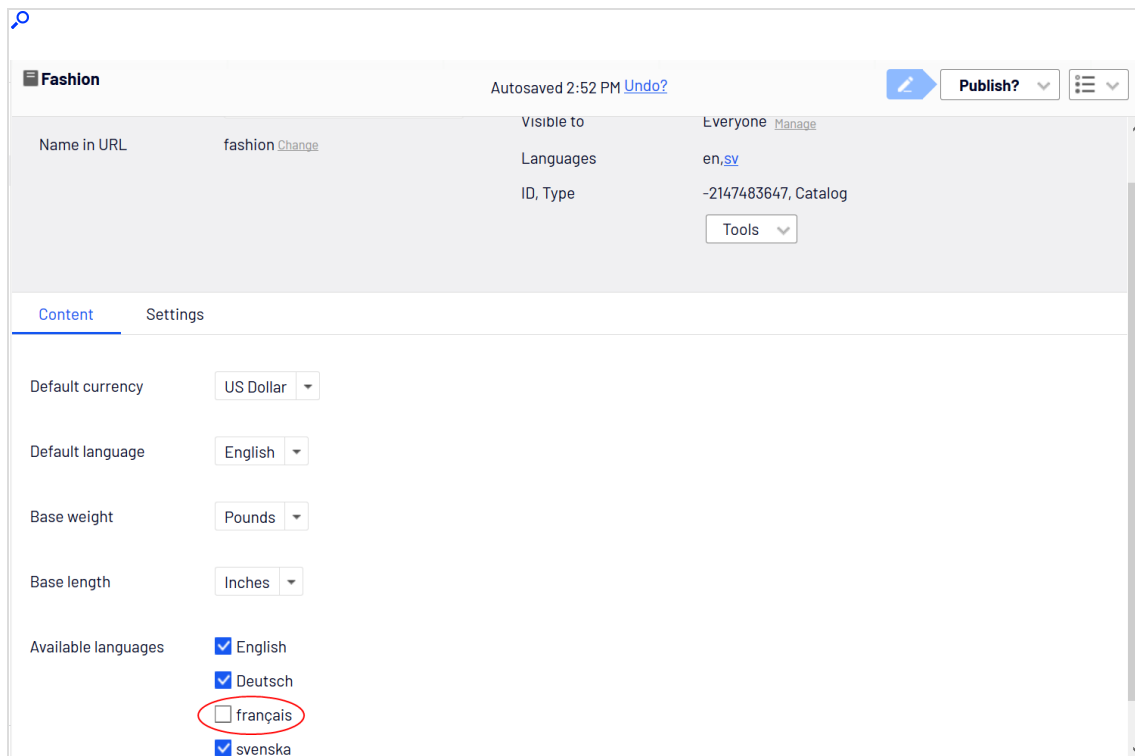
Translating catalog content is similar to translating CMS content, such as pages and blocks. Optimizely uses specific language settings for catalogs, markets, and [payment](#) and [shipping](#) methods in Optimizely Commerce.

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.



The screenshot shows the 'Fashion' catalog edit view in the Optimizely CMS admin. The 'Available languages' section is visible, with a red circle highlighting the 'français' checkbox, which is currently unchecked. Other languages shown are English, Deutsch, and svenska, all of which are checked. The 'Default language' is set to English. The 'Visible to' field is set to 'Everyone' and the 'Languages' field is set to 'en,sv'. The 'ID, Type' field is set to '-2147483647, Catalog'.

Property	Value
Name in URL	fashion Change
Visible to	Everyone Manage
Languages	en,sv
ID, Type	-2147483647, Catalog

Available languages:

- English
- Deutsch
- français
- svenska

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.).

Fashion > Mens > Mens Shoes > Faded Glory Mens Canvas Twin Gore Slip-On Sh...

Display name: Faded Glory Mens Canvas Twir

Name: Faded Glory Mens Canvas Twir

Name in URL: p-36127195 [Change](#)

SEO URL: P-36127195 [Change](#)

Code: P-36127195 [Change](#)

Markets: All [Change](#)

Visible to: Everyone

Languages: en, de, fr, sv

ID, Type: 418, Fashion product

Tools

Content | Belongs To | Variants | Assets | Related Entries | Settings

Brand: Faded Glory

Description: [Rich text editor]

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

Optimizely 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 Optimizely 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 Optimizely, 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 Optimizely 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.

Optimizely Commerce gadgets

This legacy section is being retired. If you want to read the Optimizely 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 Optimizely 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 Optimizely 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, Optimizely 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 Optimizely Commerce

Group	Provides access to	Comment
Administrators	All parts of the system, including Administration in Commerce Manager.	Usually restricted to developers for imple-

Group	Provides access to	Comment
		<p>mentation and maintenance.</p> <p>A built-in user group created when Optimizely CMS is installed.</p>
WebAdmins	<ul style="list-style-type: none"> All editing and administration views in Optimizely CMS and Optimizely Commerce. All parts of Commerce Manager except Administration. 	<p>Usually restricted to very few users.</p> <p>A built-in user group created when Optimizely CMS is installed.</p>
WebEditors	The ability to edit Optimizely Commerce content. Required for all users (if not members of WebAdmins or Administrators).	<p>Catalog editors need additional editing access rights in the catalog page tree (see Controlling access to catalogs and categories).</p> <p>A built-in user group created when Optimizely CMS is installed.</p>
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 Optimizely CMS is installed.

Optimizely 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.

Group	Provides access to
CommerceSettingsAdmins	The Commerce Settings tab, which allows editing of dictionary property values for Commerce content.

Optimizely Commerce groups for controlling access to order management functions

Group	Provides access to
Order Supervisor	All order management procedures.
Order Managers	<ul style="list-style-type: none"> • Creating returns and exchanges • Viewing and editing orders • Sending notifications • Processing payments and split shipments
Receiving Manager	<ul style="list-style-type: none"> • 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 Optimizely 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.

Allows access to create shipping methods - (order:admin:shipping:methods:mng:create)	 Edit
Allows access to delete shipping methods - (order:admin:shipping:methods:mng:delete)	 Edit
Allows access to edit shipping methods - (order:admin:shipping:methods:mng:edit)	 Edit
Allows access to view shipping methods - (order:admin:shipping:methods:mng:view)	 Edit
Allows access to create shipping packages - (order:admin:shipping:packages:mng:create)	 Edit
Allows access to delete shipping packages - (order:admin:shipping:packages:mng:delete)	 Edit
Allows access to edit shipping packages - (order:admin:shipping:packages:mng:edit)	 Edit
Allows access to view shipping packages - (order:admin:shipping:packages:mng:view)	 Edit
Allows access to create shipping providers - (order:admin:shipping:providers:mng:create)	 Edit
Allows access to delete shipping providers - (order:admin:shipping:providers:mng:delete)	 Edit
Allows access to edit shipping providers - (order:admin:shipping:providers:mng:edit)	 Edit
Allows access to view shipping providers - (order:admin:shipping:providers:mng:view)	 Edit

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.

Access Rights

Set Access Rights for "Fashion"

You can select which users and groups that will have access to this item as well as what they are allowed to do with it.



	Read	Create	Change	Delete	Publish	Administer
 CommerceAdmins	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Everyone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 WebAdmins	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 editor@example.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Fashion_Editors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
 Site_Editors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Inherit settings from parent item

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.

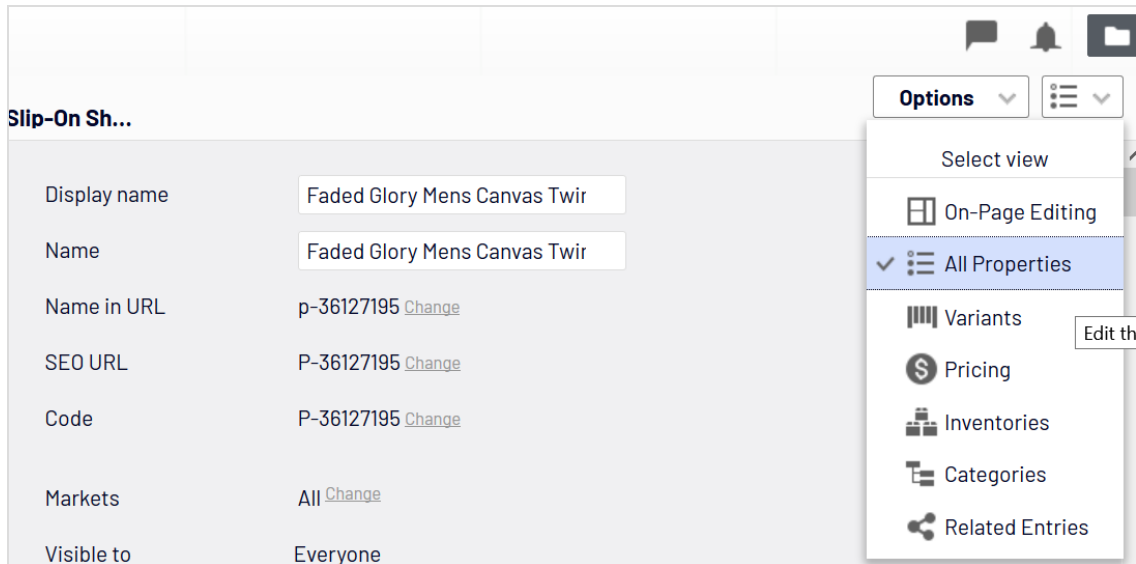
Part 1: Create custom groups

Set up user groups that will have edit access to specific catalogs. See [Managing users and user groups](#) in the CMS Administrator User Guide.

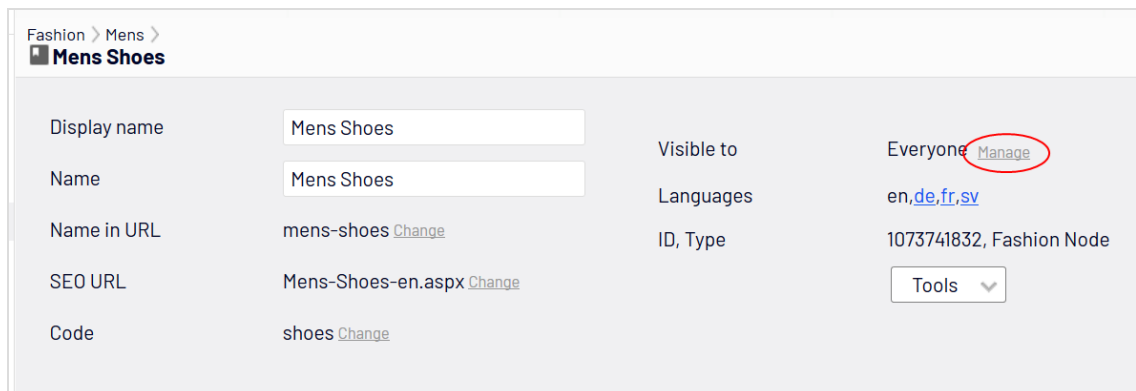
Part 2: Assign groups to catalogs/categories

1. In the Catalog, go to the catalog or category for which you want to grant access to groups or users.

- Go to **All properties** view.












- Next to **Visible to**, click **Manage**. The Set Access Rights screen appears.



- Uncheck **Inherit settings from parent item**.
- 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.

	Name	Code	Price	Stock	Published	Available from	Expires	Product Type	
<input type="checkbox"/>	 Mens Shoe	shoes			✓	4/22/15, 7:47 AM	4/21/35, 6:00 PM	Fashion Node	
<input type="checkbox"/>	 Mens Jackets	jackets			✓	4/22/15, 7:48 AM	4/21/35, 6:00 PM	Fashion Node	
<input type="checkbox"/>	 Mens Shirts	shirts			✓	4/22/15, 7:49 AM	4/21/35, 6:00 PM	Fashion Node	
<input type="checkbox"/>	 Mens Sweatshirts	sweatshir			✓	4/22/15, 7:52 AM	4/21/35, 6:00 PM	Fashion Node	
<input type="checkbox"/>	 Mens Fashionable Bundle	Mens-Fashionable Bundle_1			✓	Jan 23, 8:51 AM	1/23/27, 8:51 AM	Fashion Bundle	

Example: Creating a user with access rights in Optimizely CMS and Optimizely Commerce

In this example, you create a user who enriches product information and landing pages in Optimizely CMS, catalog content in Optimizely 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).

New User

User Information
Display Options

Username

New password

Confirm password

E-mail address

Active

Account locked (too many failed logon attempts)

Provider

Created date

Last login date

Description

Not member of

- Order Managers
- Order Supervisor
- Receiving Manager
- Shipping Manager
- WebAdmins
- Administrators

Member of

- WebEditors

3. Click **Save**.
4. Log in as the user to verify that proper access rights are applied.

Access rights for the Optimizely platform

See Managing permissions for information about managing access rights for other parts of the Optimizely platform.

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Optimizely Digital Experience Platform (DXP)[™]

The Optimizely 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.

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