Optimizely Commerce

User Guide

Optimizely Commerce User Guide

Release date 2022-03-14

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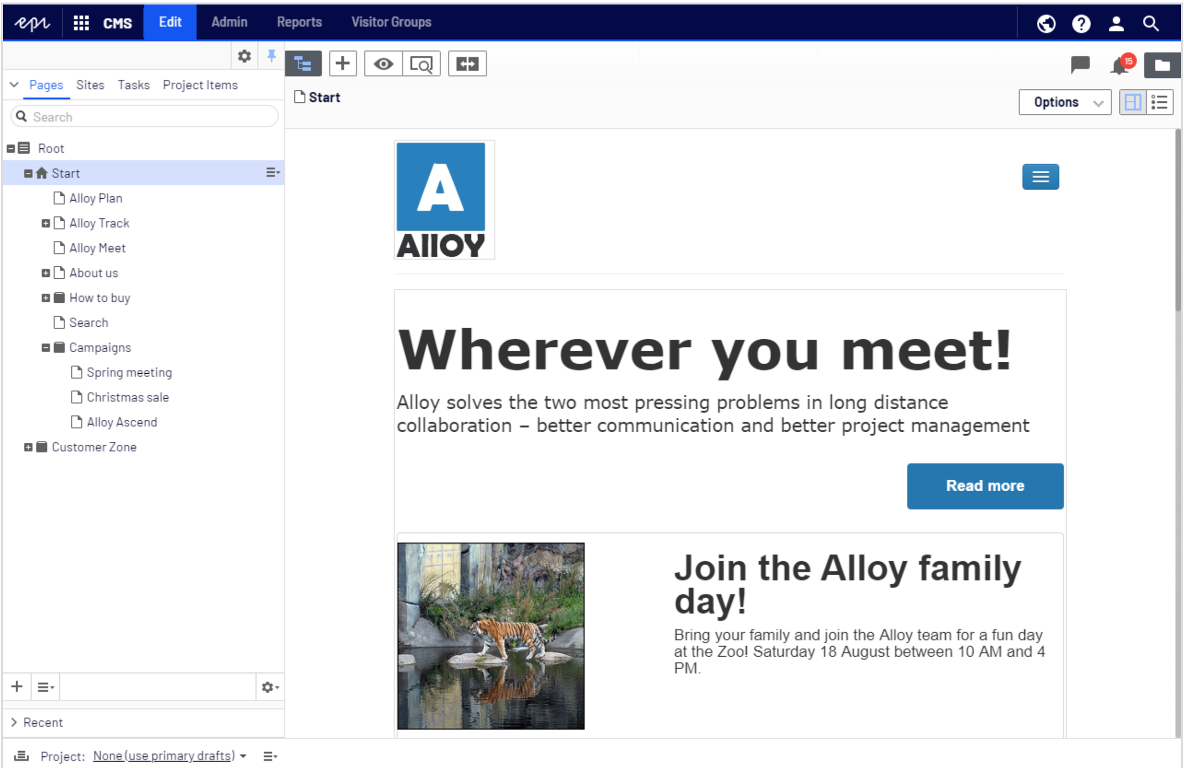
Introduction

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.

Copyright notice

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 2022-03-14. 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 2022

Released	Area	Features and updates
2021-10-21	Campaign	You can now create webhooks for the *spam complaint* event.
2021-10-15	Campaign	The new topic, Setting up the List-Help header, has been added.
2021-09-30	Campaign	As part of the rebranding, the images and attachments feature was redesigned. It is now complete and includes the option to delete created images and attachments. (update 379) When creating or editing users, you can now specify allowed IP addresses and IP ranges

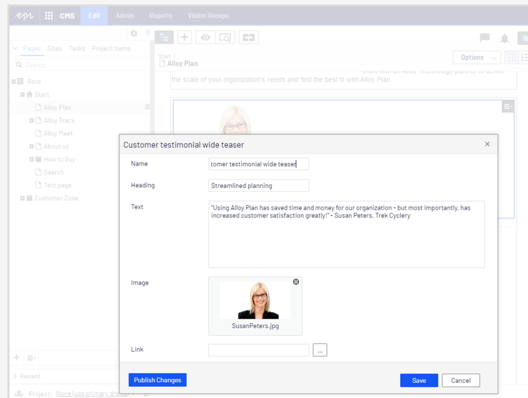
Released	Area	Features and updates
		to restrict access to the user account. See Managing users. (update 379)
2021-09-28	CMS	The Reports view is no longer supported and is removed. (update 378)
2021-09-28	CMS	The admin view is redesigned. (update 378)
2021-09-28	CMS	Visitor groups user interface is redesigned. Criteria previously included in the add-on **Visitor Group Criteria Pack** are now included in Optimizely CMS by default, see Built-in visitor group criteria. (update 378)
2021-09-28	CMS	The dashboard is no longer supported and is removed. Gadgets are now only installed in the navigation or assets panes. (update 378)
2021-09-28	Commerce	The Commerce Manager administration system is removed, and replaced with a new Administration view, from where you can define markets and warehouses, index catalogs, configure taxes, shipping, and payments, and work with dictionary properties. (update 378)
2021-09-28	Commerce	A new Customers view replaces the legacy Customer Management in Commerce Manager. (update 378)
2021-09-28	Commerce	Some functionality, previously managed from Commerce Manager, is now managed through code: • Dictionaries. Adding currencies, countries, and return reasons. • Dictionaries. Adding values for organizations and contacts.

Released	Area	Features and updates
		• Catalog batch updates and catalog import/export. • Management of business objects, and catalog and meta-classes fields. See Optimizely World for technical details, and previous versions of the user guide for the removed legacy functionality. (update 378)
2021-09-23	Campaign	Mailings Classic and Reports will be deactivated on 2022-03-01. To migrate your mailings to Smart Campaigns, see Mailings Classic. To migrate your reports to the Performance Dashboard and Deep Analytics, see Reports. (update 377) The current Apple operating system versions include the Apple Mail Privacy Protection, which restricts the transmission of tracking information to Optimizely Campaign. See Apple Mail Privacy Protection.
2021-09-09	Campaign	You can now merge mailing content from different campaigns into a new campaign. See Merge content. (update 377)
2021-09-02	Campaign	When importing recipients, you can now merge the contents of recipient list fields of type "String" and "Text". You can either append or prepend the content or replace the old content with the new one. (update 376)
2021-08-12	Marketing automation connectors	The configuration settings screen of the Microsoft Dynamics CRM connector was updated.
2021-08-02	Campaign	The redesigned user interface has been released. Optimizely Campaign screenshots in

Released	Area	Features and updates
		the user guide have been updated. See Start page.
2021-07-22	Marketing automation connectors	The Pardot connector has a breaking change when you upgrade to version 6. The configuration screen has new fields to create new connectors. Configurations made with older versions of the Pardot connector will no longer work.
2021-07-20	Campaign	You can now create webhooks for the *unsubscribe* event. (update 373)
2021-07-13	Email Product Recommendations	New strategy: Recommendations from categories of purchased products (last 365 days)
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. (update 371)
2021-06-17	Campaign	See Deliverability basics for information about the BIMI 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)
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

Released	Area	Features and updates
		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 *bounce* 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 *sent* 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 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	In the Optimizely Campaign start menu under

Released	Area	Features and updates
		Scheduled jobs, you can find an overview of the scheduled jobs configured in your client. (update 360) If you use the coupon system, you can generate bar codes based on the values of your recipient list fields via field functions.
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 *Every 2 months, each 1st from 14:00*, 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 *notes* associated with carts, orders, and subscriptions (update 349).
2021-01-21	Personalization	• 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.

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.

Shopping flow

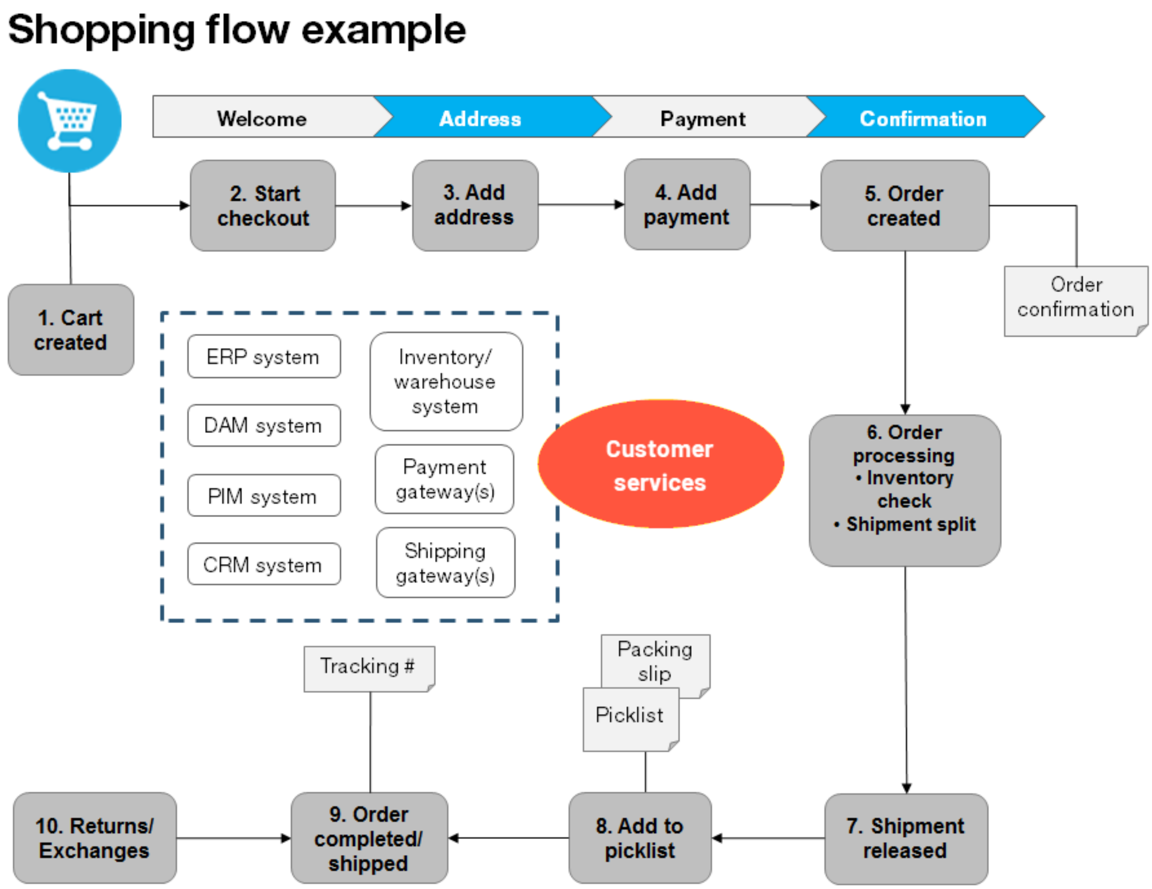
The two most common types of e-commerce websites are:

- **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.



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

Importing and exporting of catalogs are useful in various scenarios. When setting up an Optimizely 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.

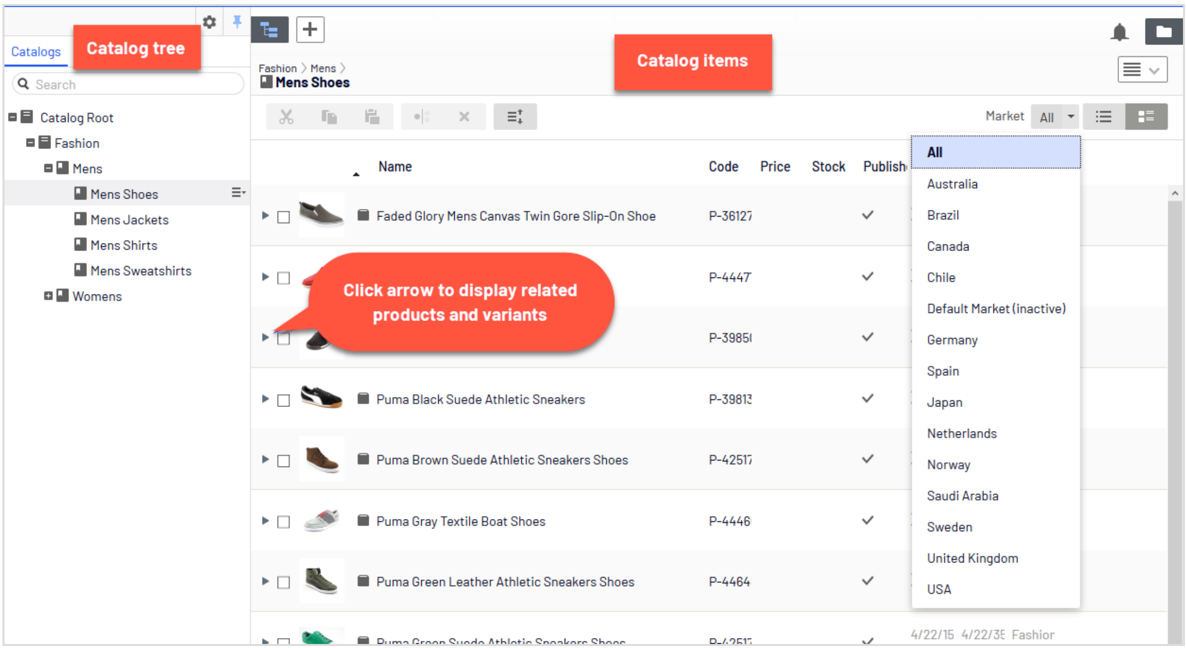
Catalog import/export is done through code, using the import/export API, or the Service API. See Optimizely World for technical details.

Browsing and searching catalogs

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

Browsing catalogs

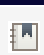
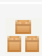
Click **Catalogs** to browse the list of catalogs. The following image shows multiple catalog nodes containing different types of products.



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

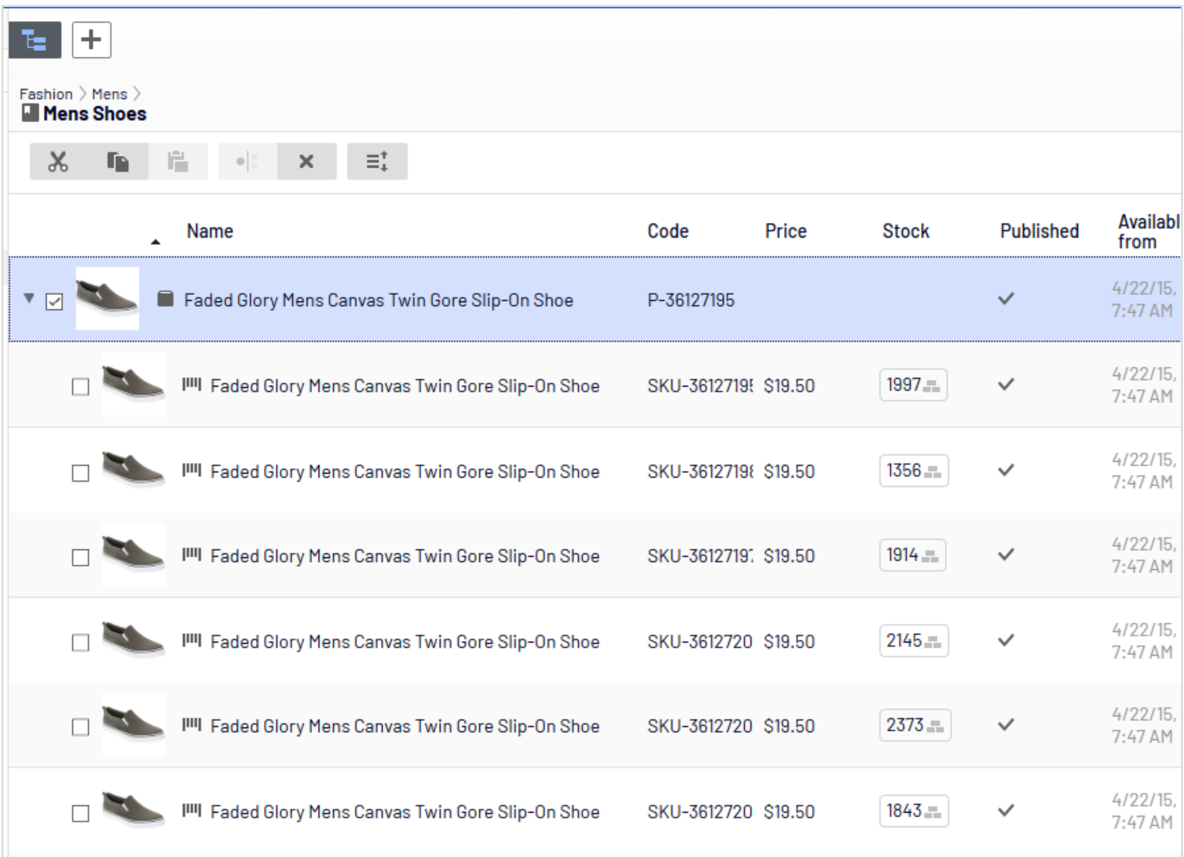
Select a category and drill down until you see products, packages, and bundles. Select the arrow next to a product, package or bundle to display related products and variants. Inventory and pricing information appears for variants.

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

Icon	Meaning
	category
	bundle
	package
	product

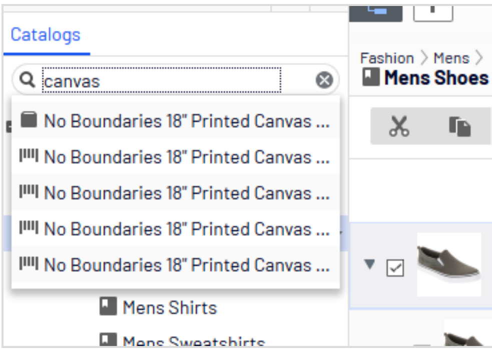
Icon	Meaning
	variant

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



Searching for catalog entries

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



Accessing products in CMS

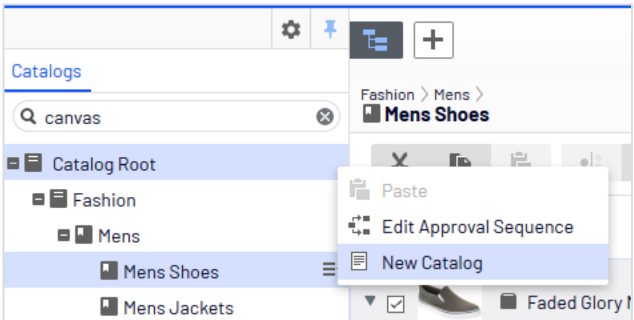
You can also access catalog entries from edit view through the **Catalogs** gadget in the assets pane. The gadget is useful when dragging-and-dropping catalog entries into content areas. See also: Managing content.

Creating and editing a catalog

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

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

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



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

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

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

Deleting a catalog

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

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

Working with catalog entries

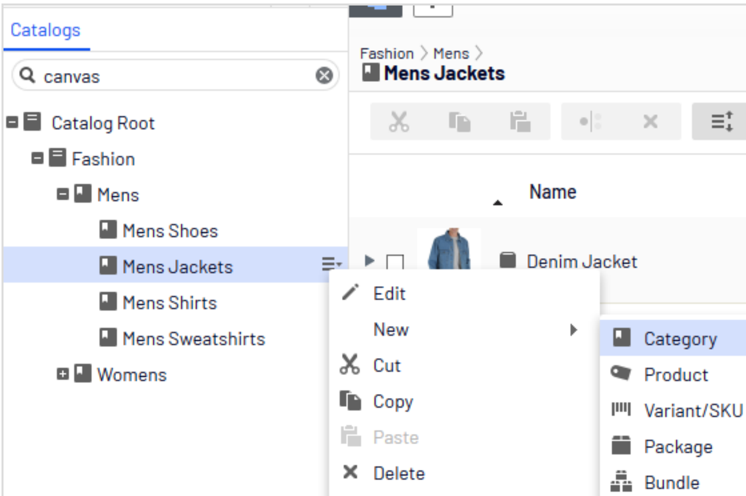
The Catalog interface in Optimizely Commerce enables you to work with catalog data. Marketers may want to create new products and variants, and merchandisers may want to enrich products as they are added to e-commerce channels. E-commerce solutions integrated with an external ERP system may have products 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 subentries 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

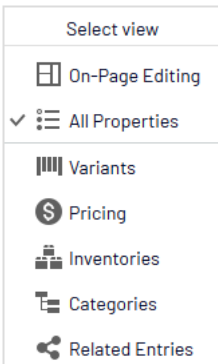
After you import products and variants, you can add to, edit or delete them.

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

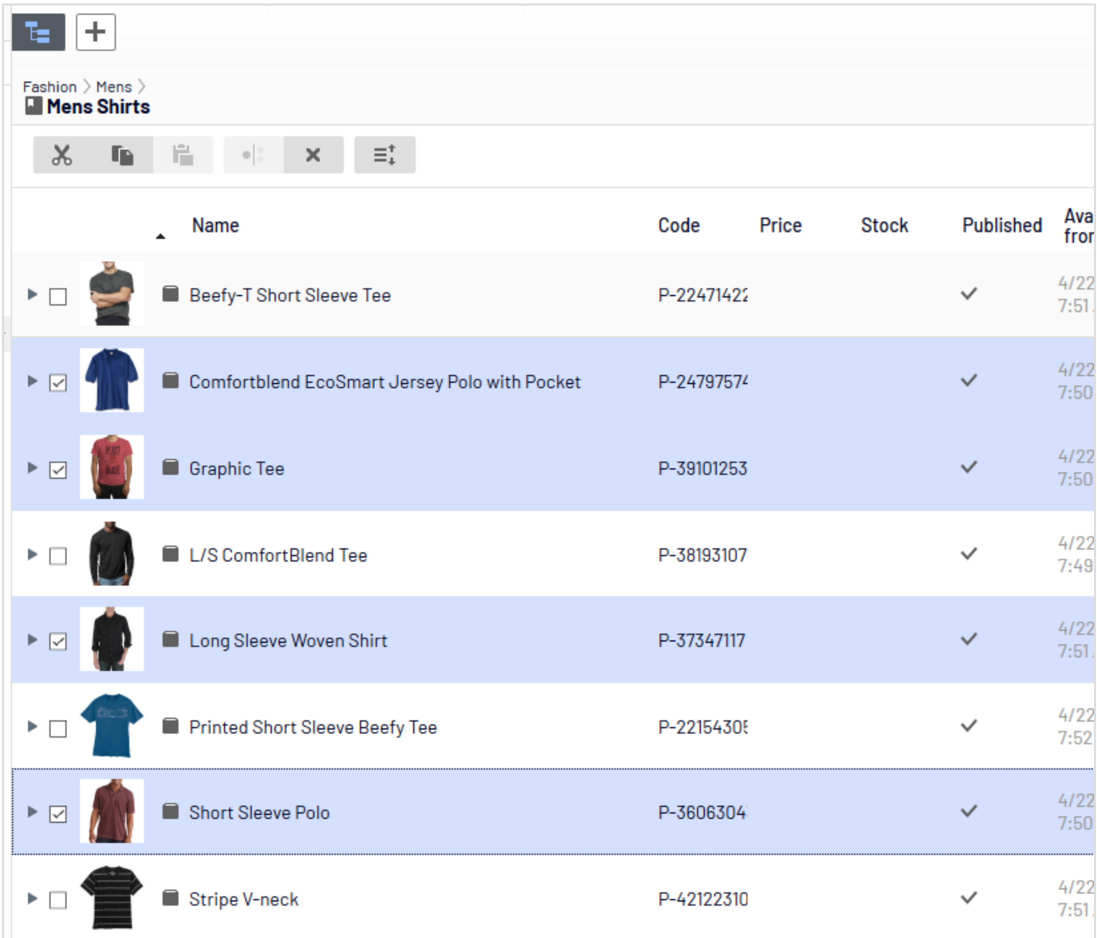
The catalog item list has on the top right a **Select view** with additional editing options. Use these to edit and access the **Pricing**, **Inventory**, **Categories**, or **Related Entries** views.



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**.



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**.

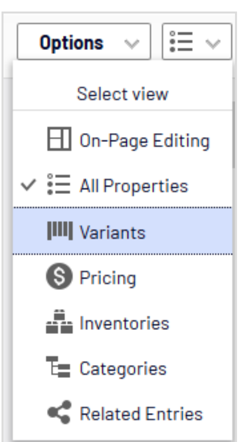
Notes about sorting

- 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

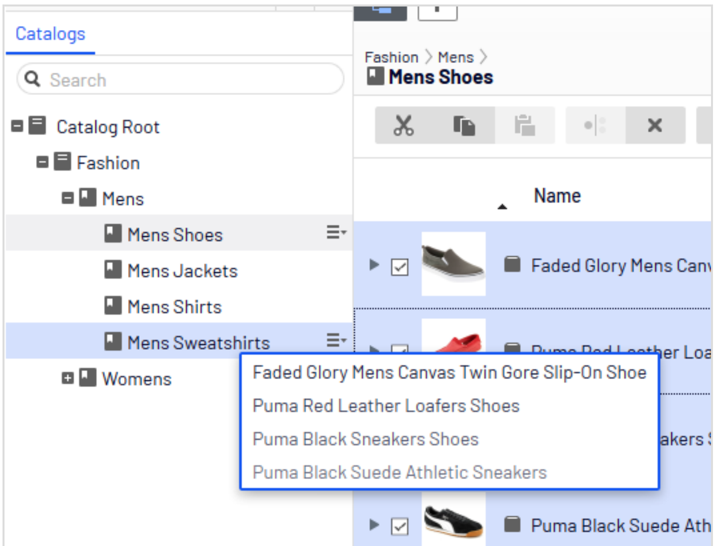
You can duplicate an existing entry to create a new entry. If you do, it gets a unique ID, and you can edit the following details. You can then move the new entry to different catalog tree location.

- 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

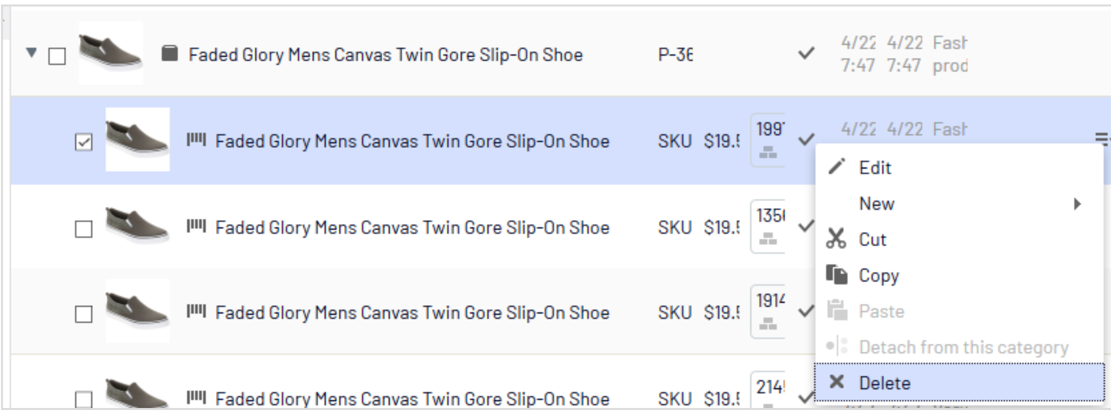
When deleting a product or a variant, the following happens depending on how the deleted entry is related to other catalog entries:

- 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**.

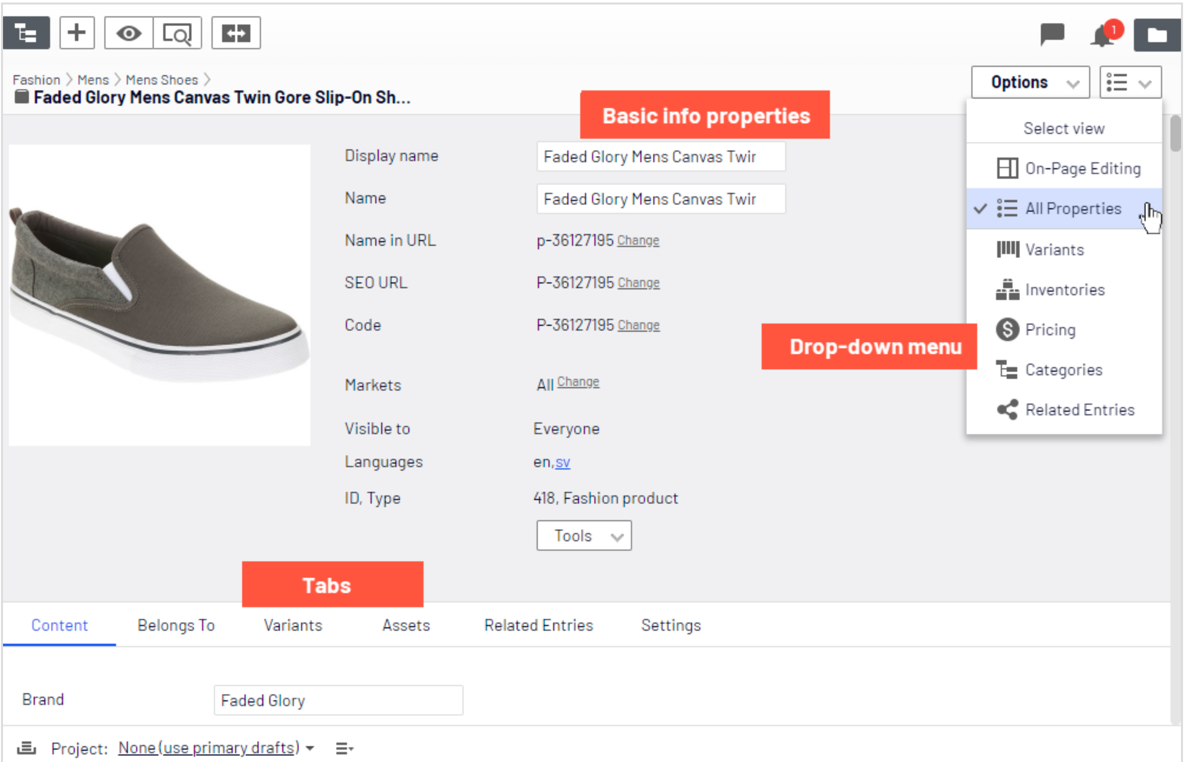


To delete multiple catalog entries at the same time, select the entries then click **Delete** in the toolbar.

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

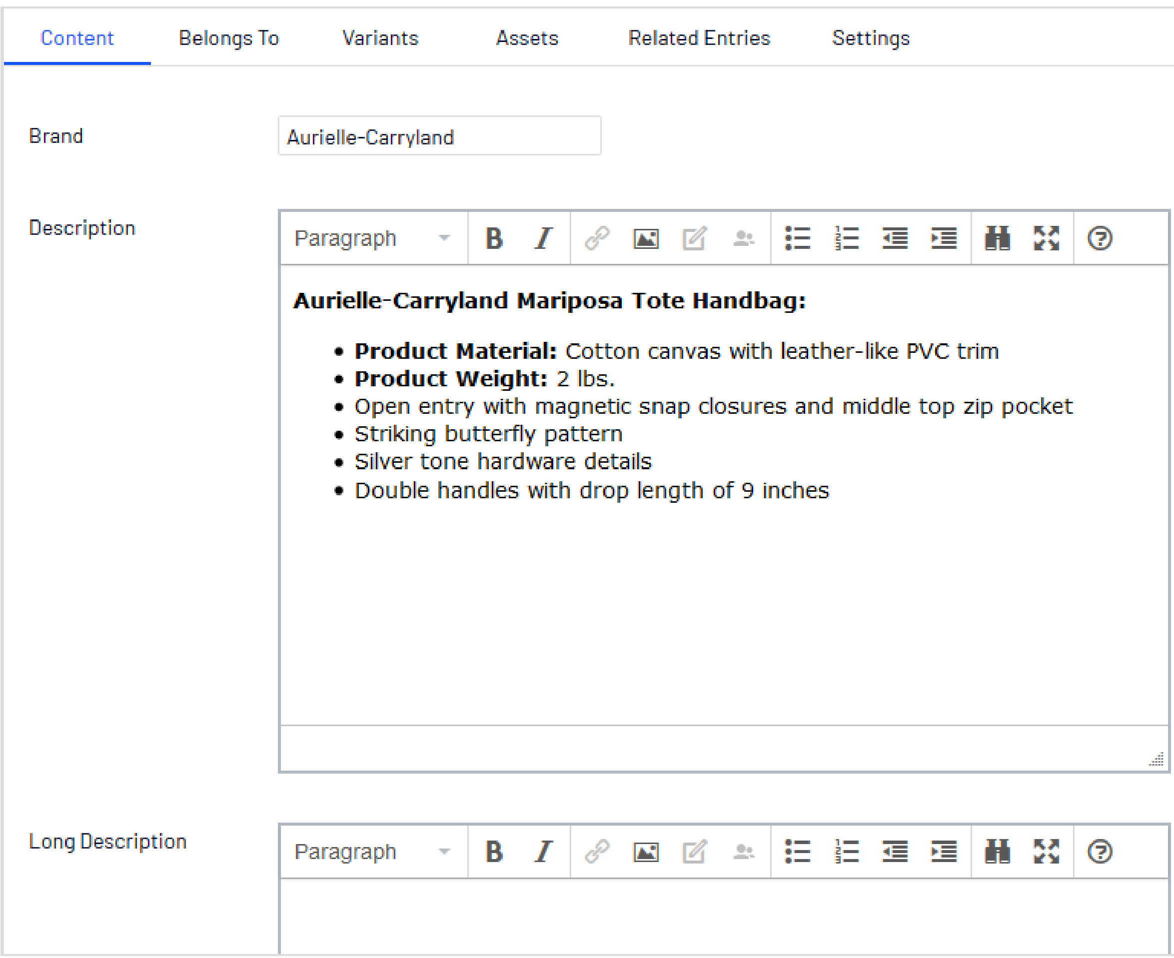
The basic info properties area provides an overview of catalog entry information. Much of it is created automatically and rarely needs to be changed, unless you manually create catalog entries. **Change** appears next to some properties. Click it to edit a property value.

- **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

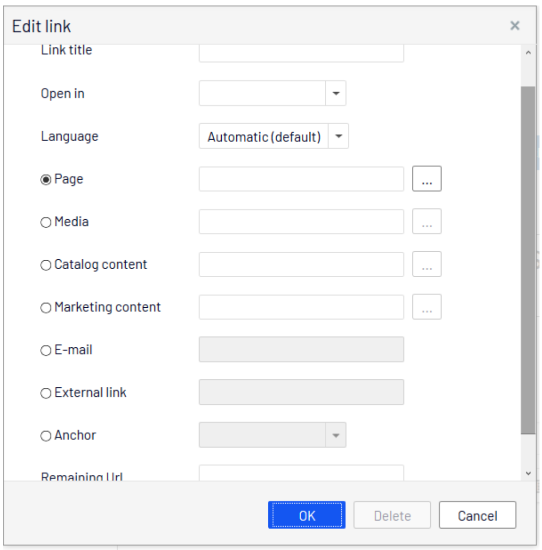
The **Content** tab properties depend on the product or variant.



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

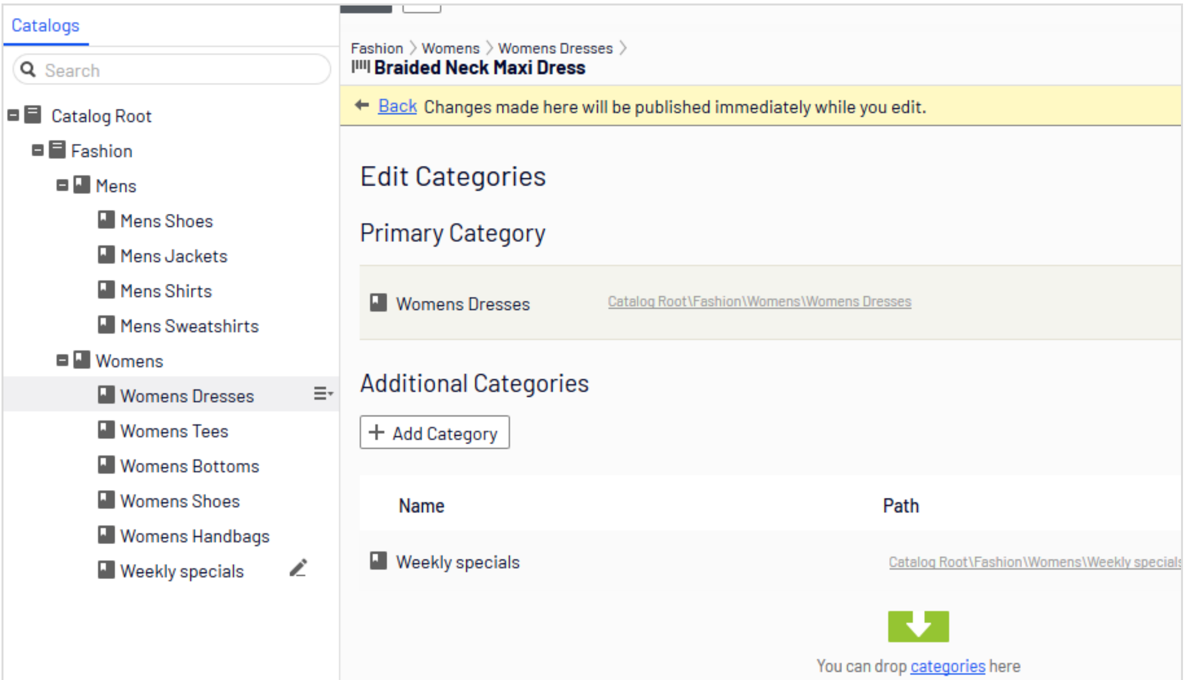
The Links dialog includes the following Commerce-specific properties:

- **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.

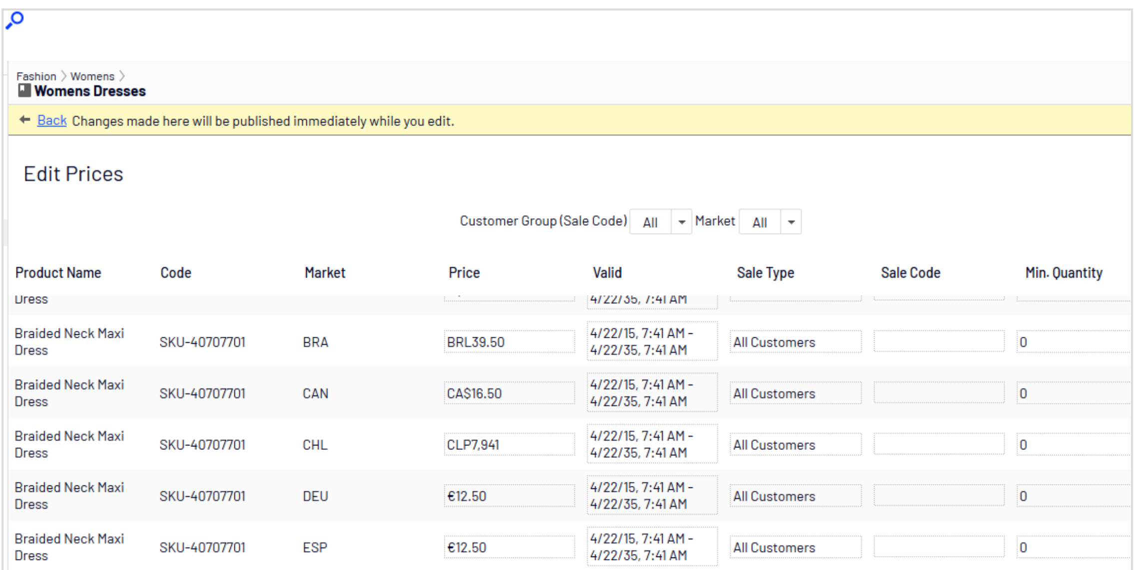
- market
- price
- valid date range
- sale type
- sale code
- minimum quantity

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**.



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.

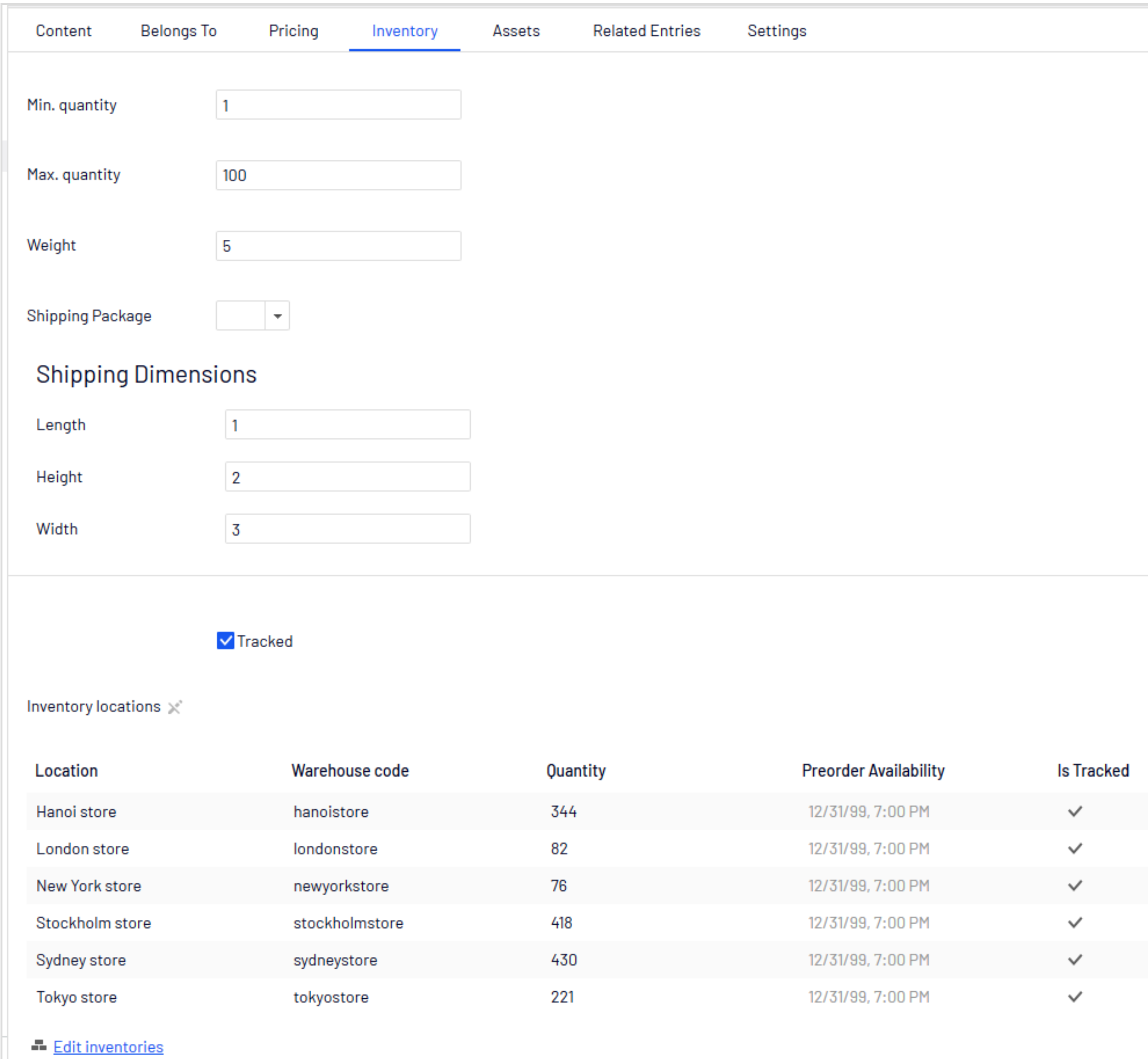
To create a customer group price:

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

Inventory (for variants)

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

Inventory screen



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

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

- **Max. quantity**. If desired, set a maximum number of this variant that a customer can buy. If a customer adds more than this to a cart, the quantity will be decreased to the maximum during cart validation.
- **Weight**. Enter the variant's weight in your system's weight unit. Weight is used to calculate shipping costs.
- **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.
- **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.

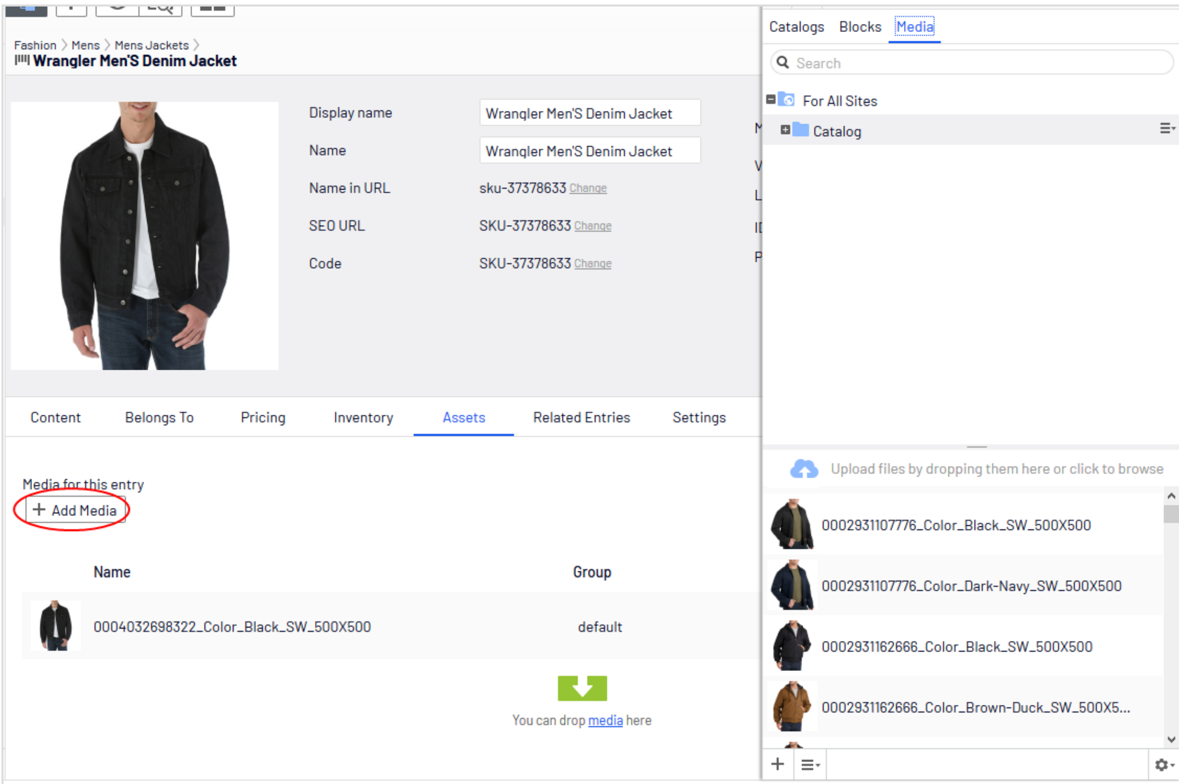
Variants (for products)

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. For example, you want to assign a picture to a catalog entry to accompany its website description.

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



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

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

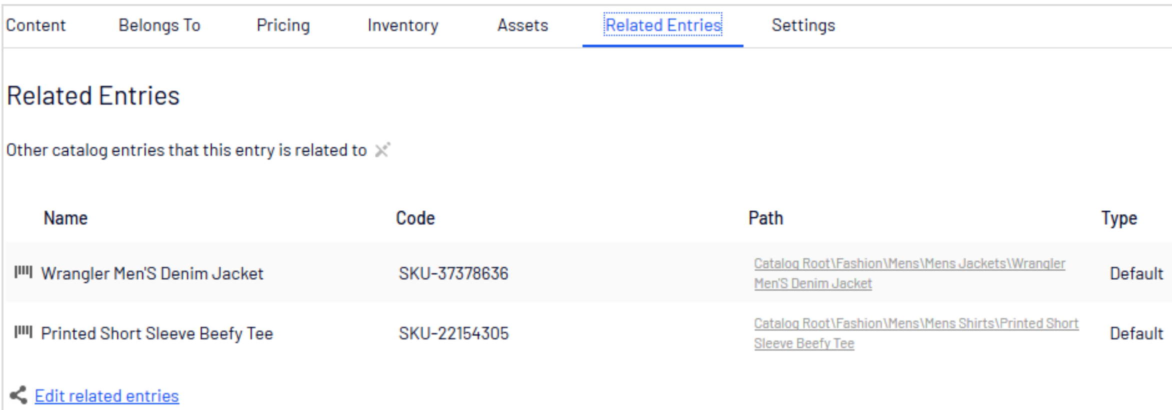
On the sample site, the item assigned to the default group at the top of the list is used for the main display.

Related entries

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

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

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



Settings

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

Working with categories

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

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

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

Categorization involves the following tasks.

- **Move**. Lets you restructure a catalog by moving a catalog entry to another primary category; related products and variants are also moved. Links to other categories and catalog entries are kept intact. See **Moving catalog entries**.
- **Duplicate**. Creates a copy of a catalog entry in a new catalog location. See **Duplicating catalog entries**.
- **Link**. Another term for or assigning additional categories. See **Assigning additional categories**.
- **Detach**. Removes a link.

Creating a category

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

1. From the **Commerce** > **Catalog** interface, 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.

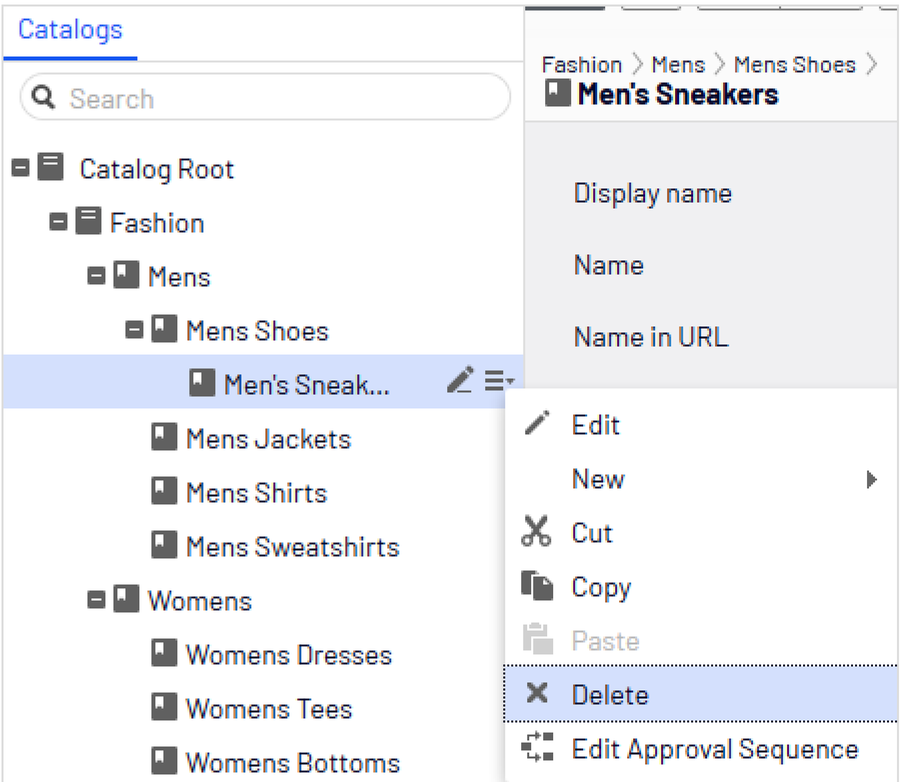
Deleting a category

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.

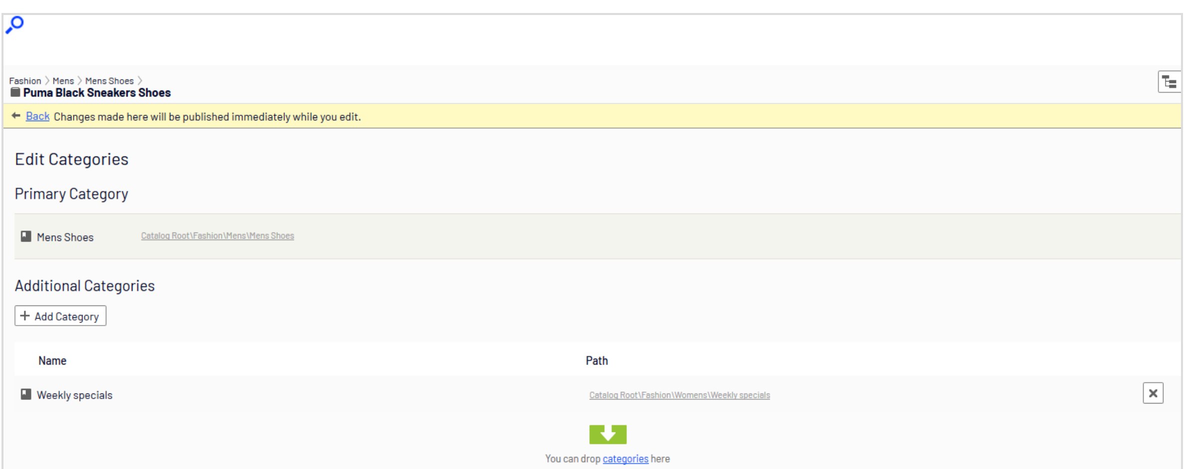
> **Warning:** After deleting a catalog entry, you cannot recover it.
>
> If you delete a category with many subitems, the deletion may take a while.

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

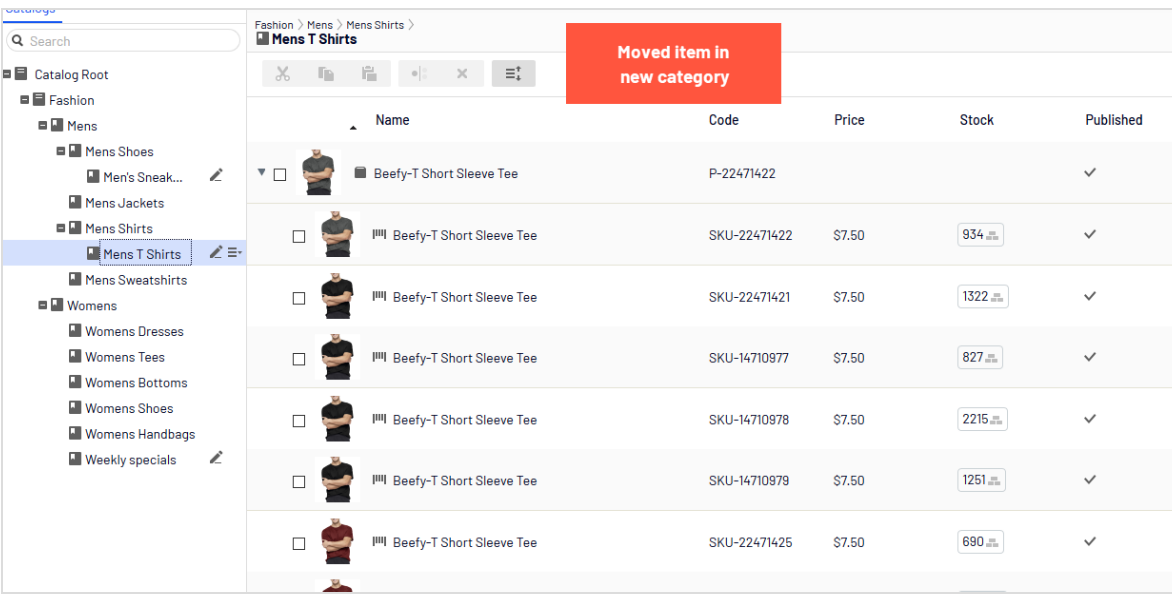
1. Select the catalog entry.
2. Select **Cut**.
3. Move to the new category.
4. Select **Paste**.

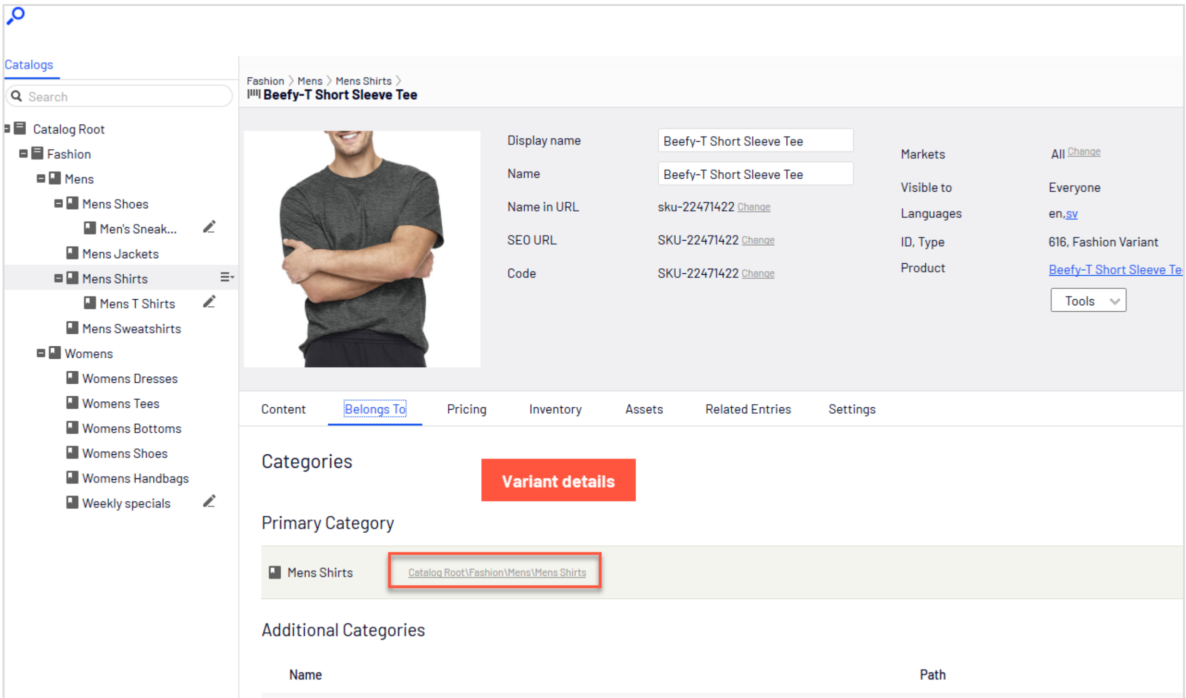
How changing an item's primary category affects its variants

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**.





Assigning additional categories

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

1. Go to the category structure until the item to be linked appears in the catalog item list.
2. Click **Select view**  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 **Select view**  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 **Select view**  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.

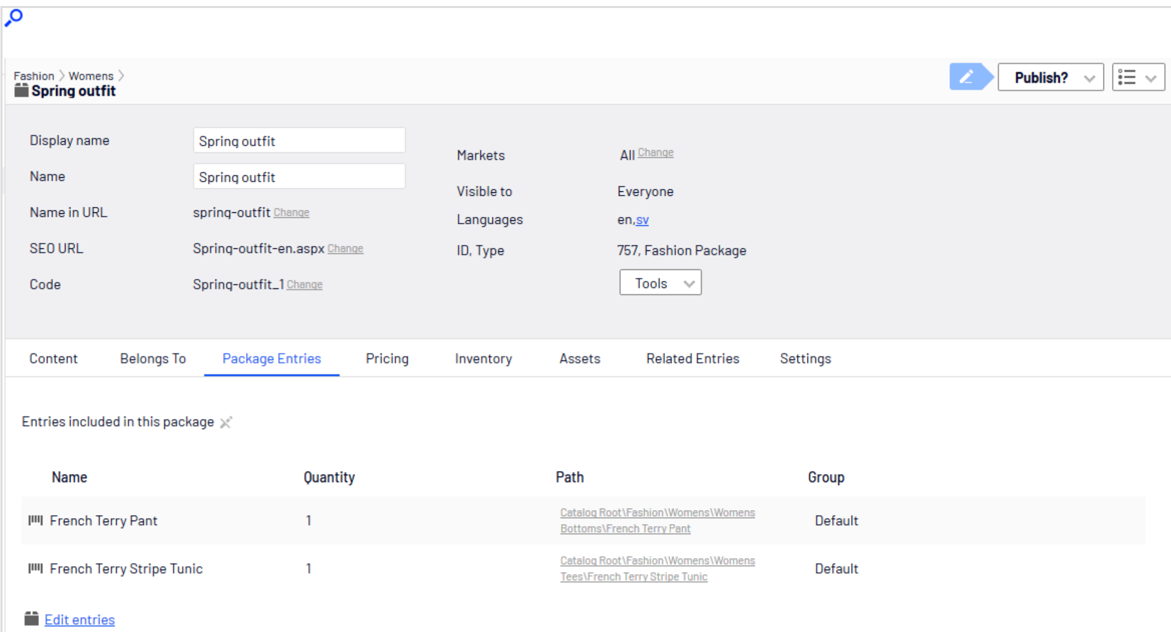
- A package contains one or more variants, other packages or both, and has a *single SKU and price*. A package is a single line item in a shopping cart.
- A bundle is a collection of packages, products, and variants, *each of which is priced individually*, allowing customers to purchase several items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

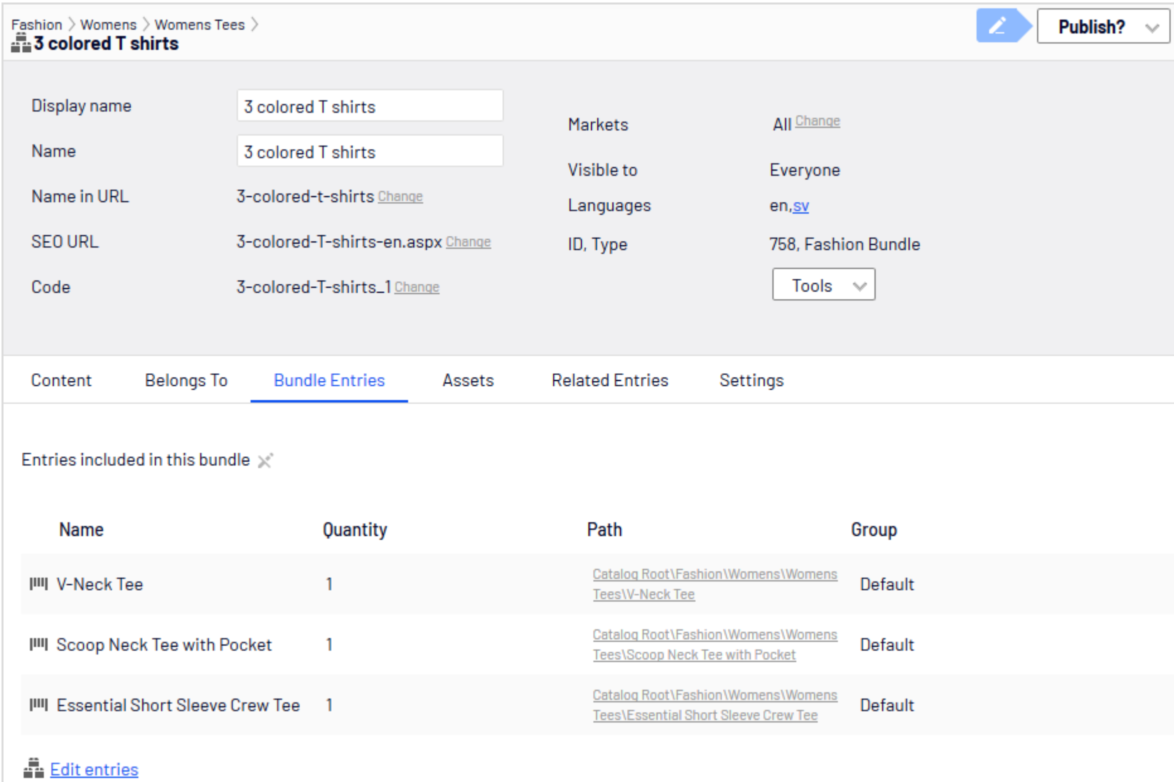
Click **Manage Entry Groups** to add entry groups with which to associate a package's items.



Working with bundles

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

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



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

Deleting a package or bundle

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

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

- To delete a package or bundle:
    1. Open the item's context menu.
    2. Click **Delete**.
    3. Click delete to confirm.

- To delete multiple catalog entries at once, select them from the item list and click **Delete** from the toolbar.

How the Campaigns feature considers packages and bundles

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

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

Managing multiple content versions

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 **Importing and exporting a catalog**.

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, which you can do from the Order Management view.

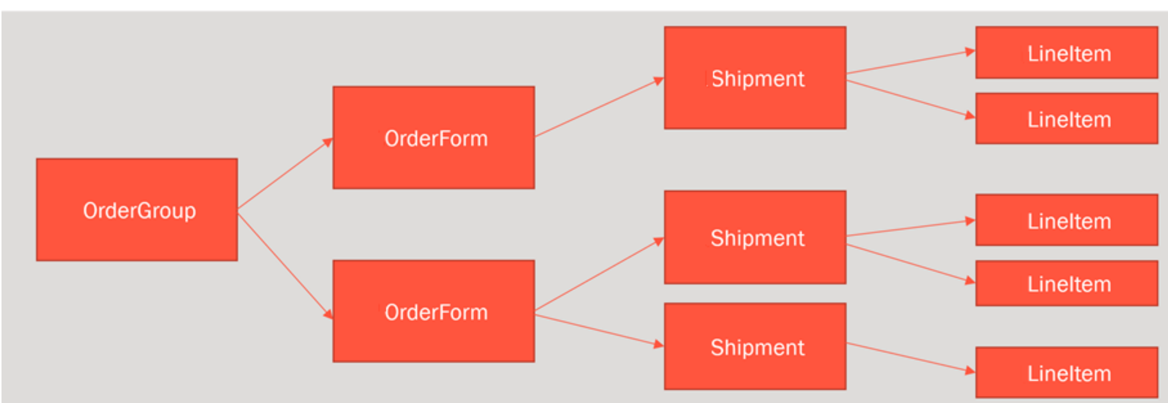
Carts versus orders

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.



A cart or an order can contain one or more order forms. In most B2C sites, there is only one form per cart or order. In B2B sites, multiple forms may be used where a buyer places an order for different sections of an organization. Each section has its own form, with separate details.

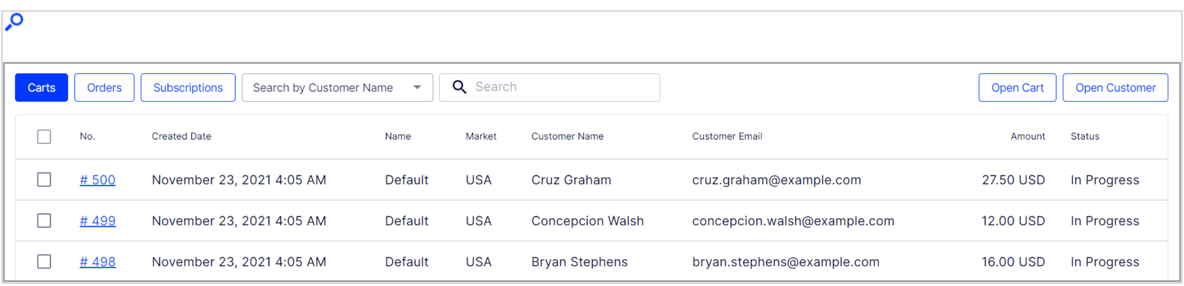
Each order form can have one or more shipments, and each shipment is made up of one or more line items.

Order Management screen

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

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

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



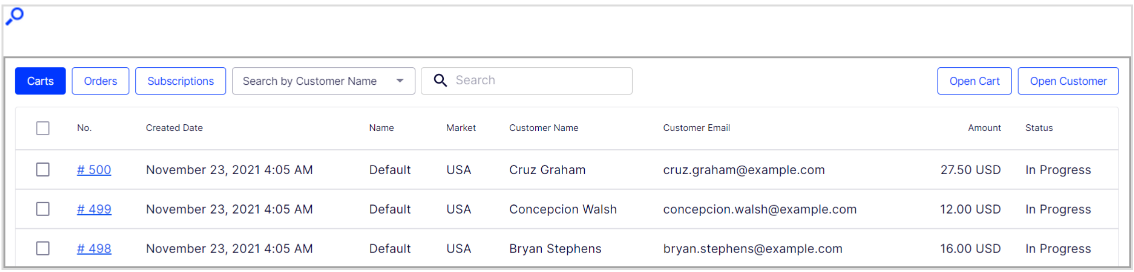
Viewing and updating customer information

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

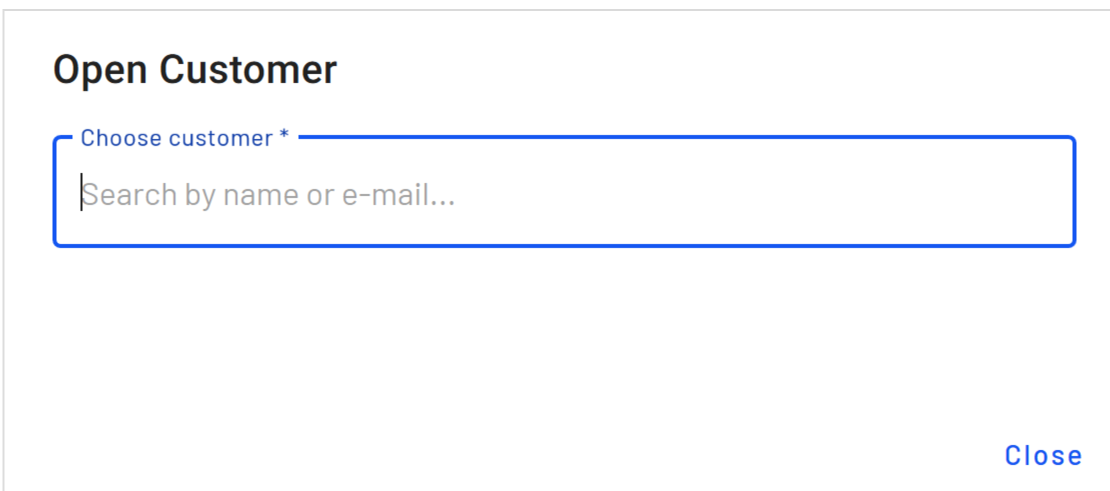
Searching for customers

To quickly find a customer, follow these steps.

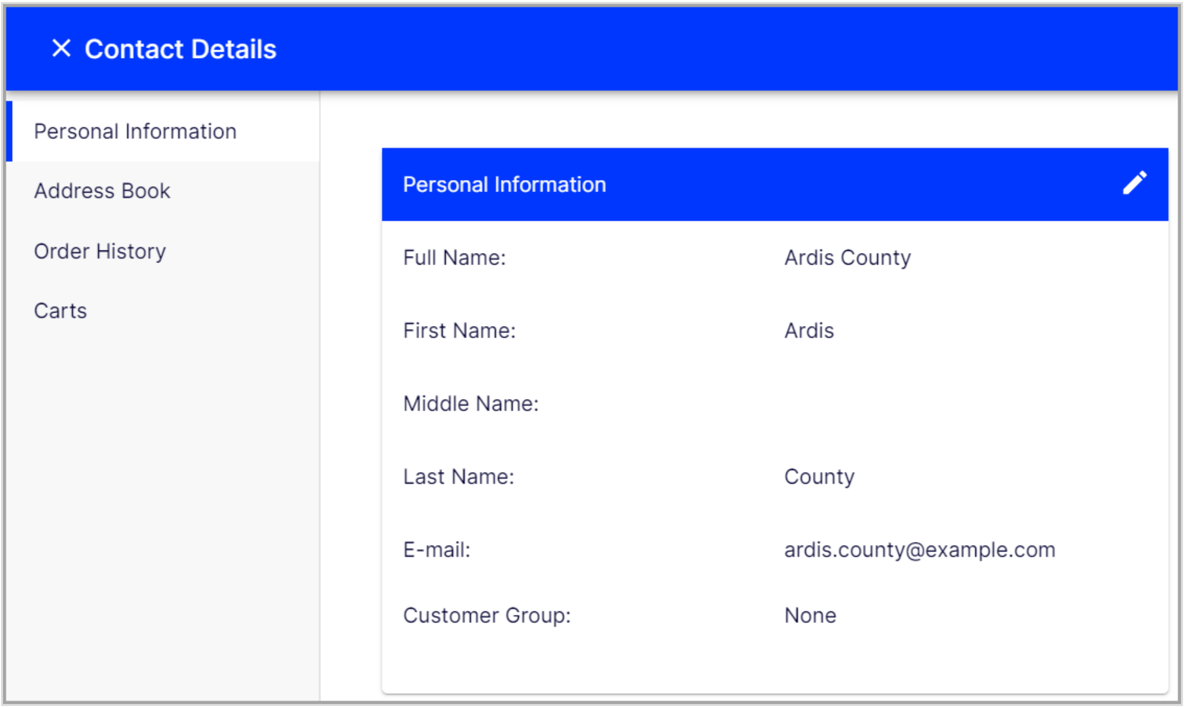
1. From the Order management screen, click **Open Customer**.



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

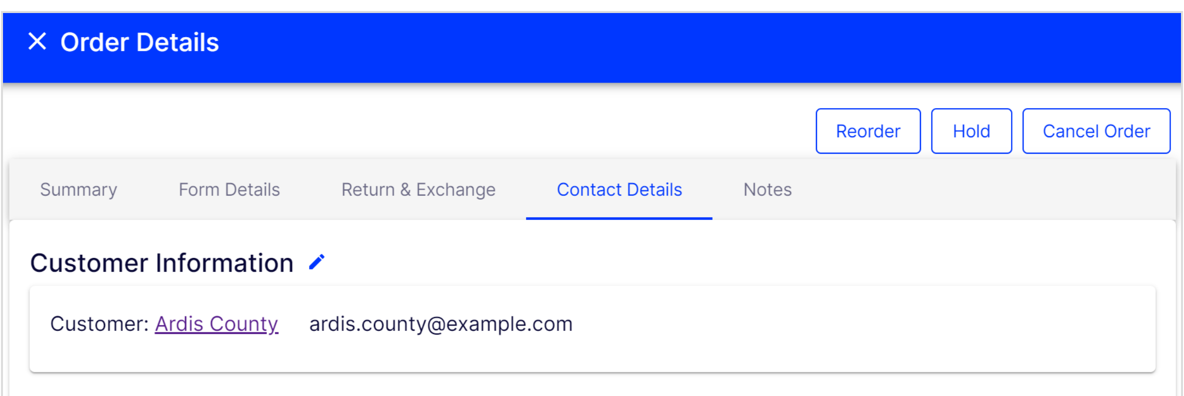


3. A list of customers whose name or email address include those characters appears.
4. Choose a customer.
5. The **Contact Details** screen for that customer appears.



Updating basic customer information

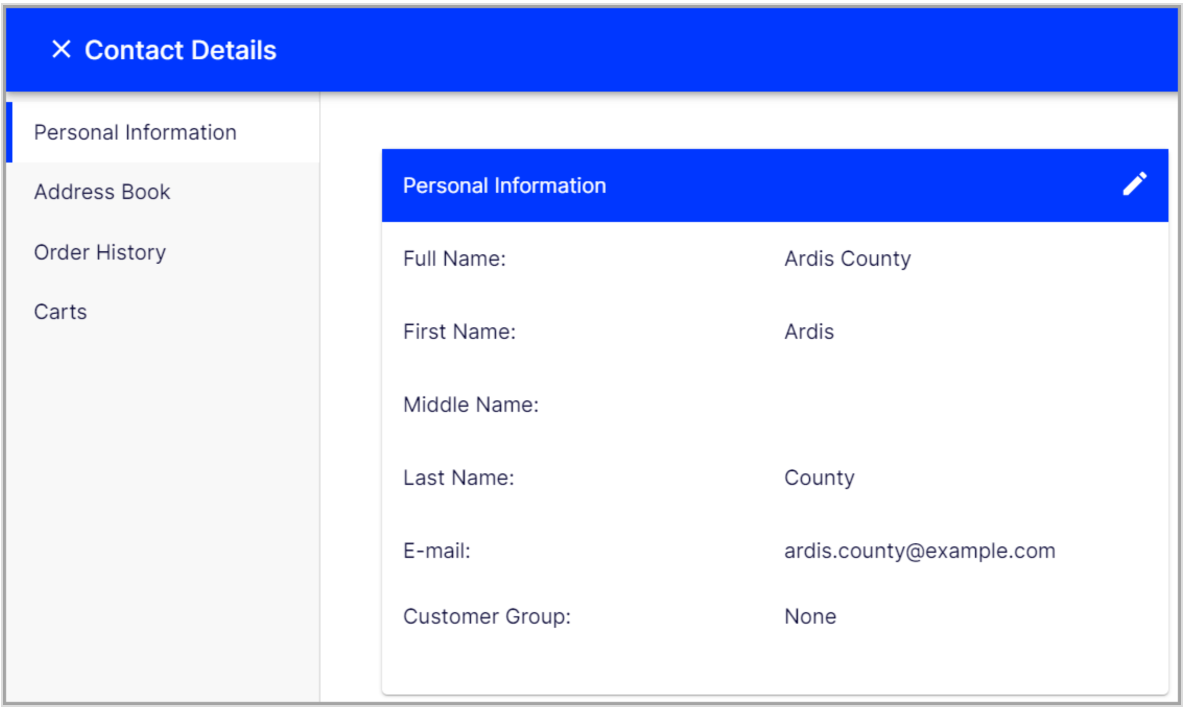
You can also view and update basic customer information from the **Contact Details** tab, available from the **Cart Details** and the **Order Details** screens. To do so, click the **Edit** icon beside **Customer Information**.



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

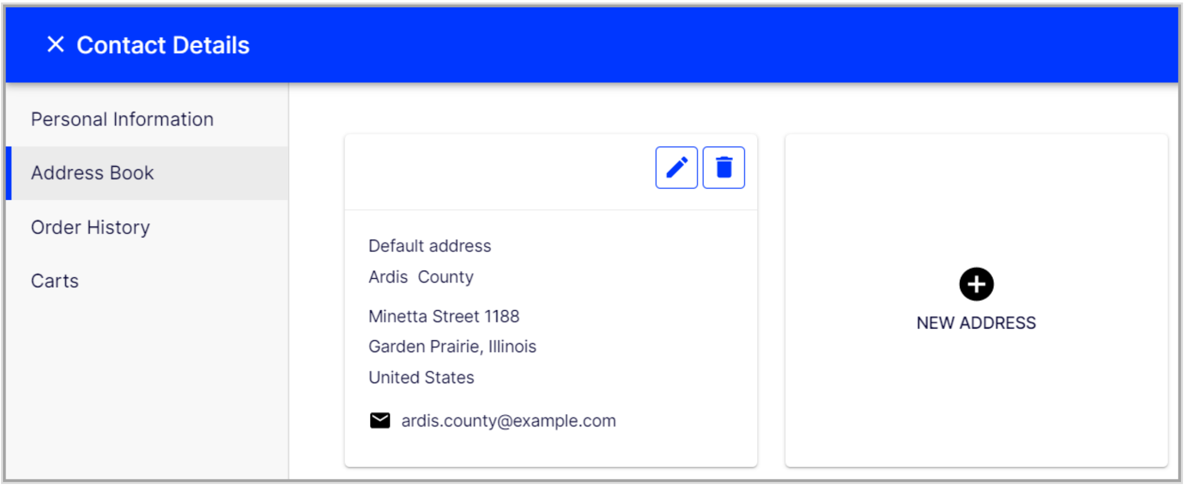
Personal Information tab

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



Address Book tab

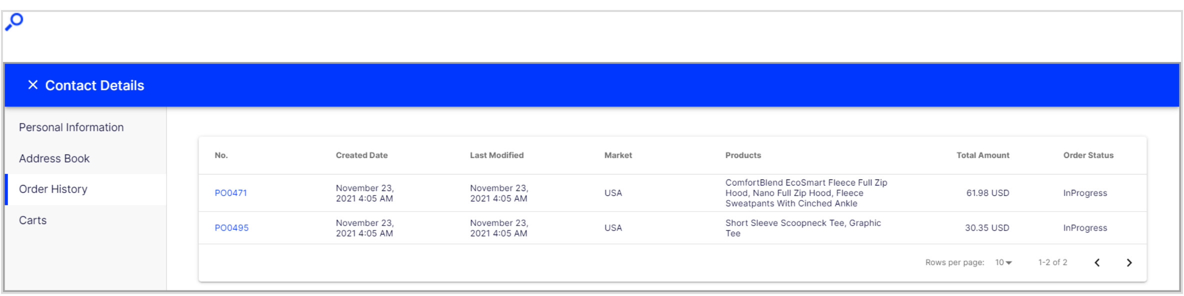
Initially, you see all of a customer's addresses.



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.

Order History tab

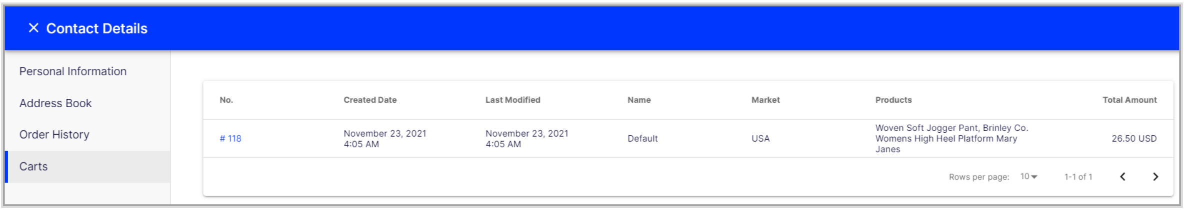
The **Order History** tab shows a customer's order history in reverse chronological order.



You can click any order to see and edits its details. See **Orders**.

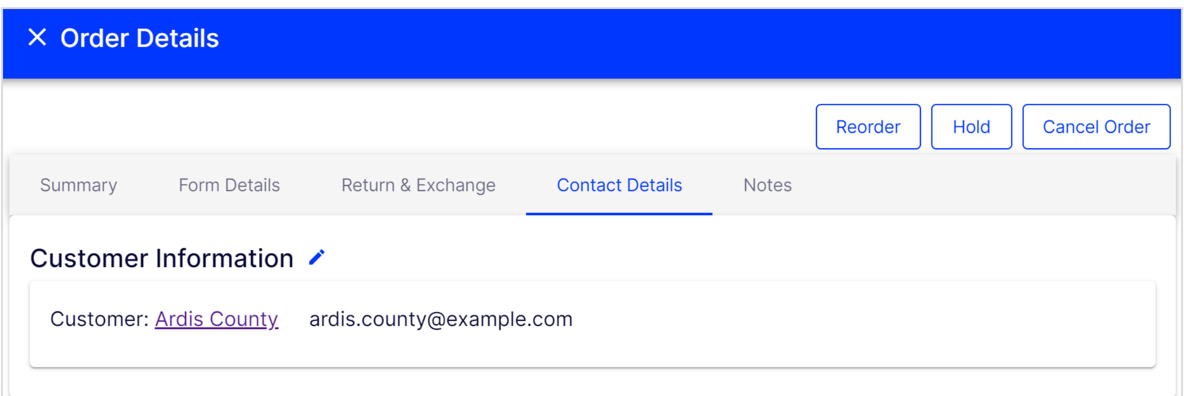
Carts tab

The **Carts** tab shows a customer's cart and wish lists ordered by the **Last Modified** date in reverse chronological order.

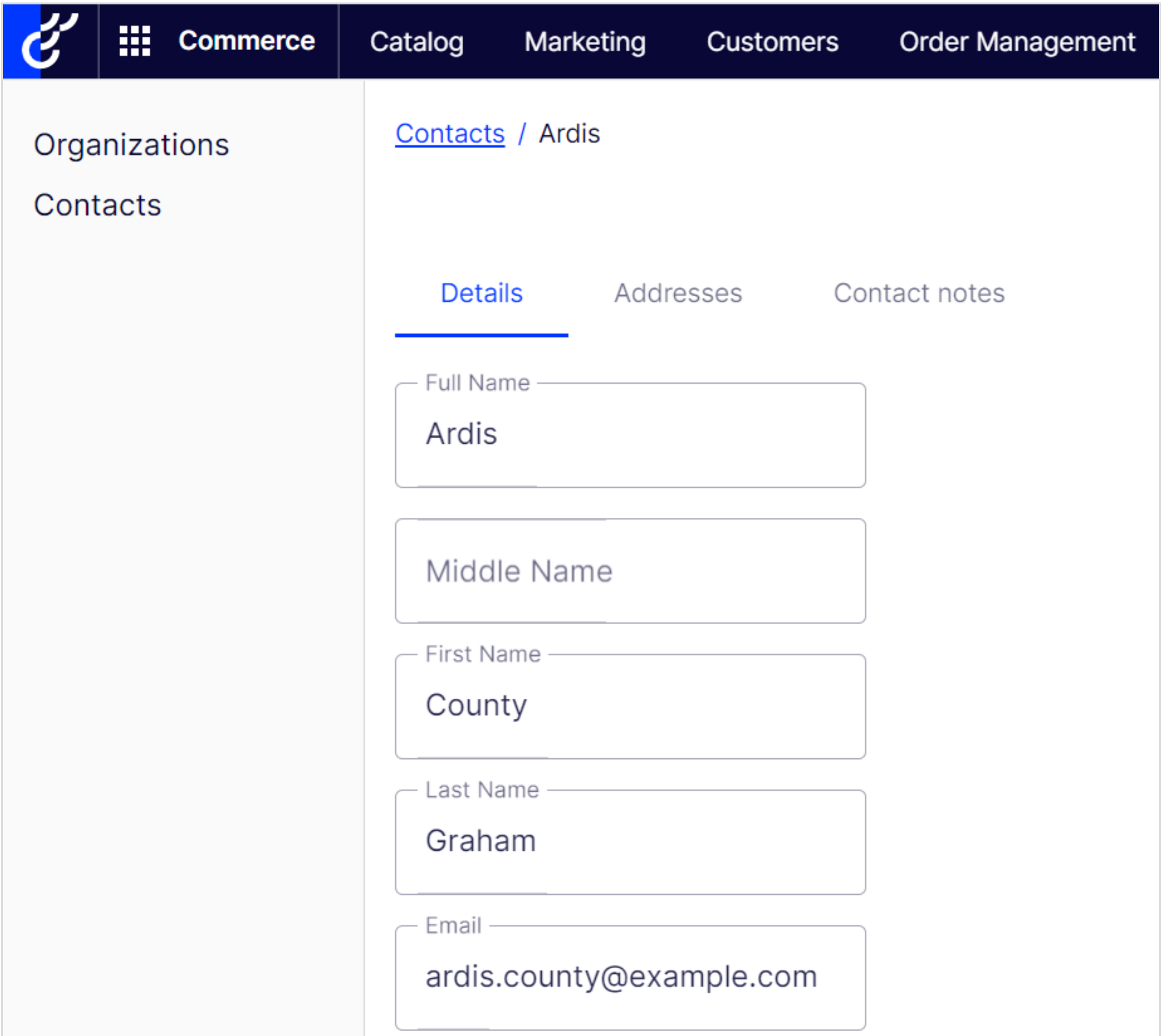


Updating standard and custom customer information

You can also view and update standard and custom customer information from the **Contact Details** tab, available from the **Cart Details** and the **Order Details** screens. To do so, click the customer's name below **Customer Information**.



The **Customer** screen **Contacts** tab appears with three tabs: **Details**, **Addresses**, and **Contact Notes**. For more information on these tabs, refer to **Creating and editing contacts**.



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.

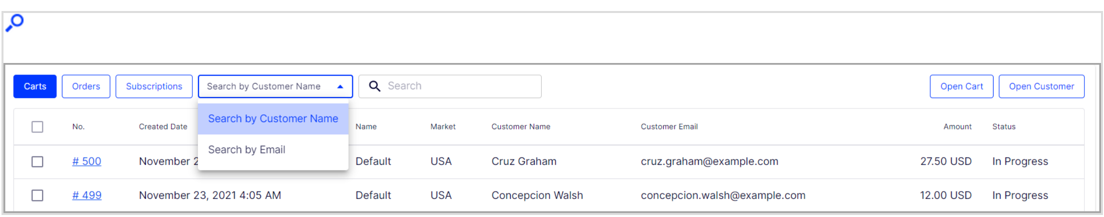
Each shopping cart is unique and has its own ID. A customer can have only one cart open at a time. So, if the customer already has a cart open, the system redirects to the open cart.

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*.



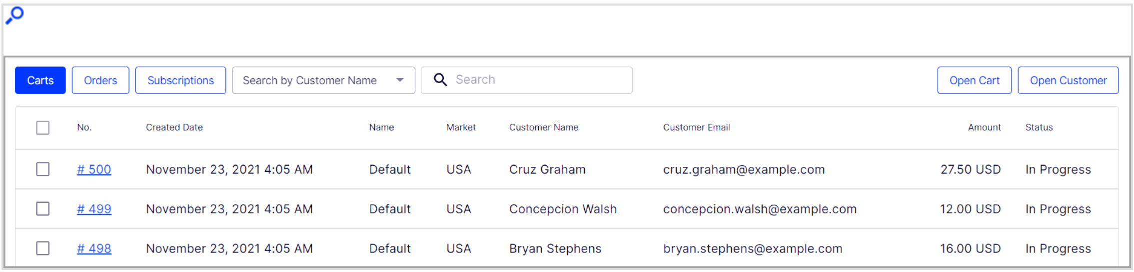
   - If you chose **Search by Email**, enter the exact email address. Partial entries are not valid.
3. Carts that match your search criteria appear.

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

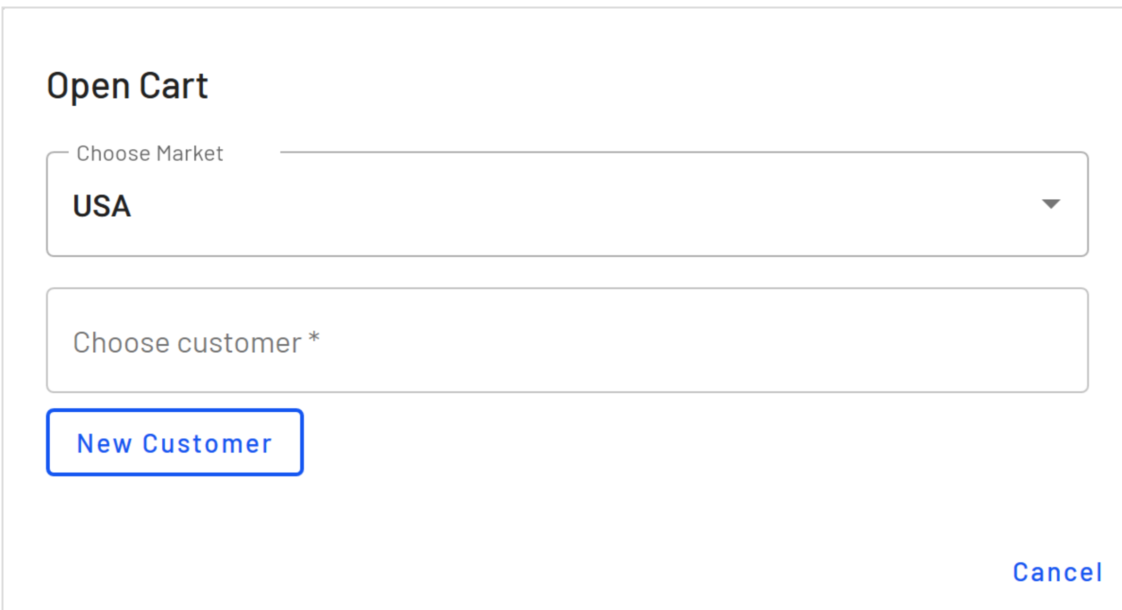
Open Cart dialog

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

1. Click **Open Cart**.

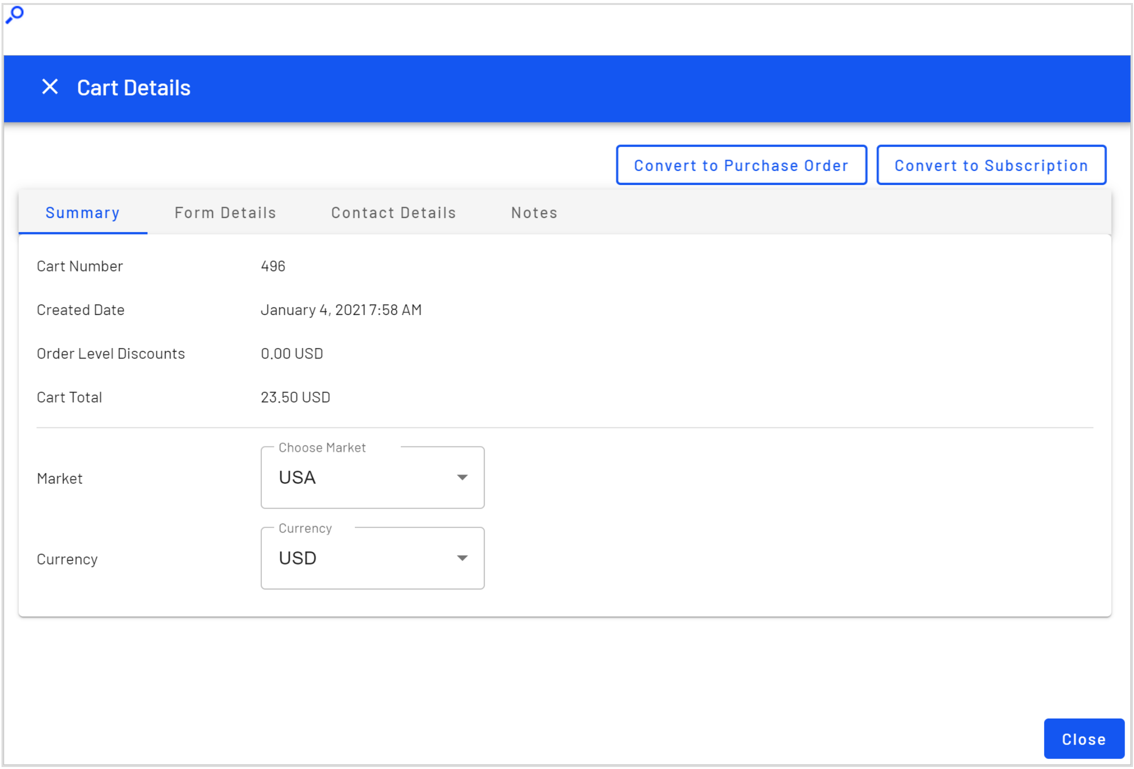


2. Select a market for the cart.



3. Enter any part of the customer's name or email address. A list of matching customer names appears.
4. Select the customer.

5. The **Cart Details** screen opens.



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

Viewing a cart

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

Information at the top of the screen:

- Cart name
- Market and currency
- Customer name

- Total amount of charges
- Cart status

Summary tab

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

Form Details tab

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

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

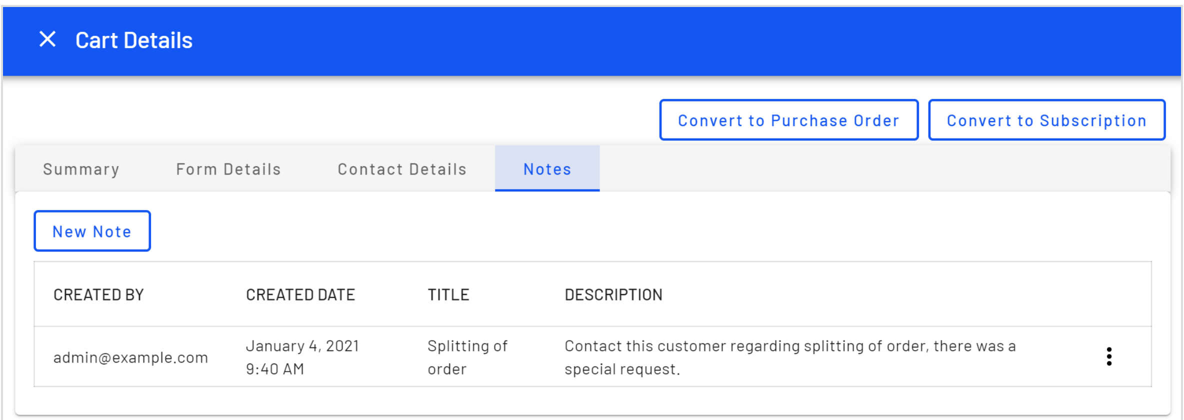
Contact Details tab

- Customer name and email address

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

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.



Editing carts

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

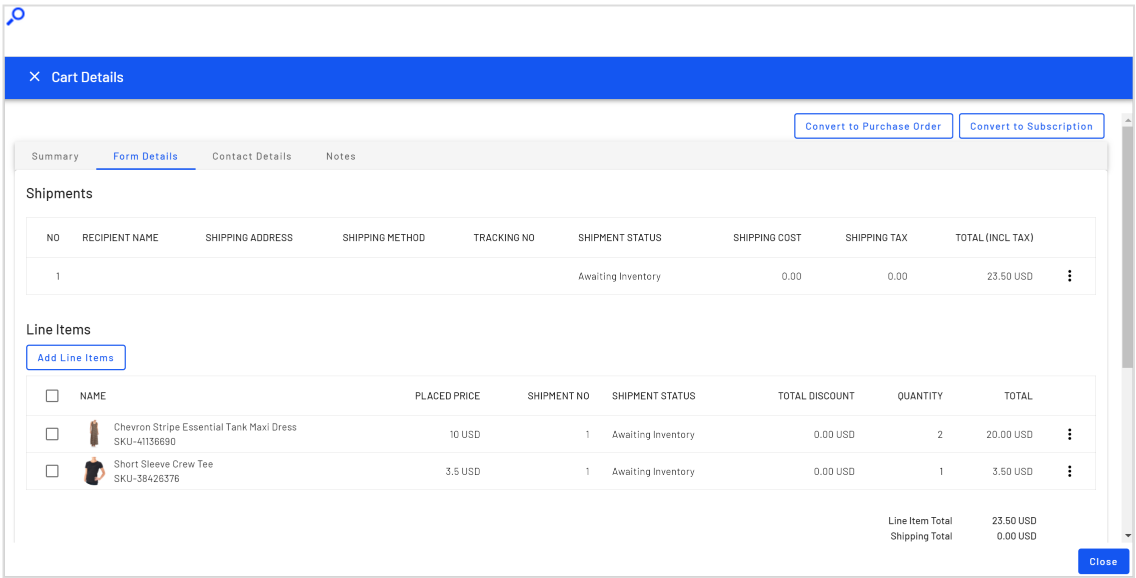
Updating market and currency

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

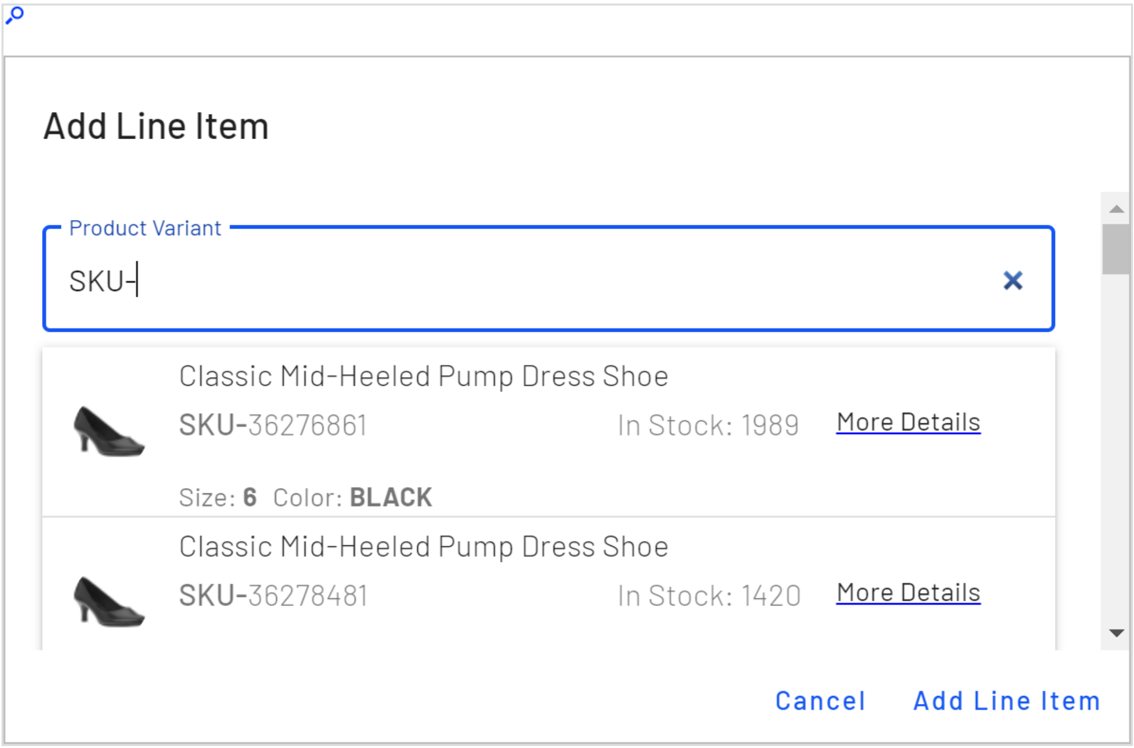
Adding a line item

To add a new line item:

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



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



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

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

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

6. Enter a quantity.

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

7. Click **Add Line Item**.

Changing a line item's quantity

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

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

Deleting a line item

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

Selecting a shipping address

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

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

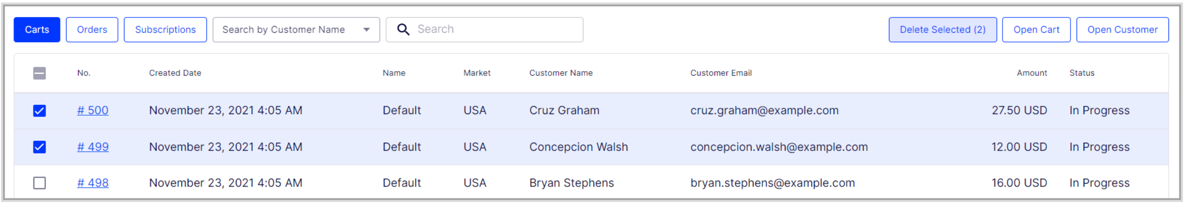
Addresses are stored in and editable from the **Contact Details** screen's Address book tab.

Deleting Carts

If needed, you can delete one or more carts on the **Order Management** screen.

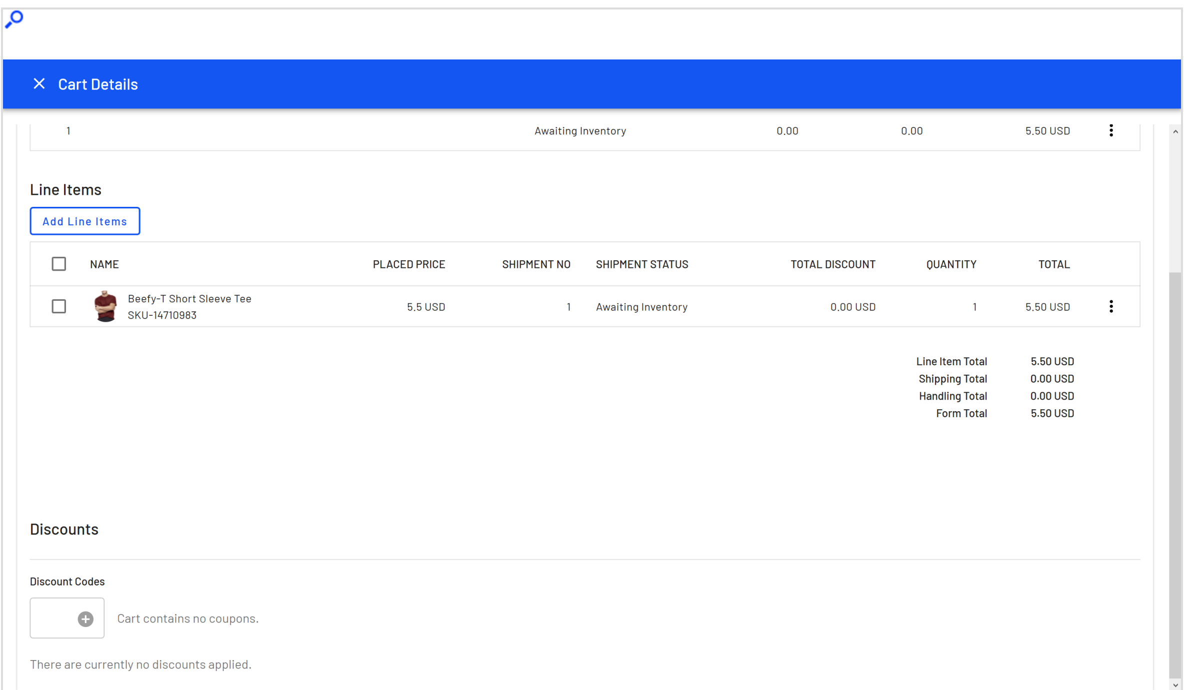
> **Warning:** Deleting a cart removes its record from the system.

1. In the top left corner of the Order Management screen, click the **Carts** button.
2. In the first column on the left, select the checkbox for each cart you wish to delete.
3. In the top right corner, click **Delete Selected**.
4. Click **OK** to confirm that you wish to delete the selected cart(s).



Viewing and editing discounts

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



Discount codes

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

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

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

Creating discount codes for customer appreciation

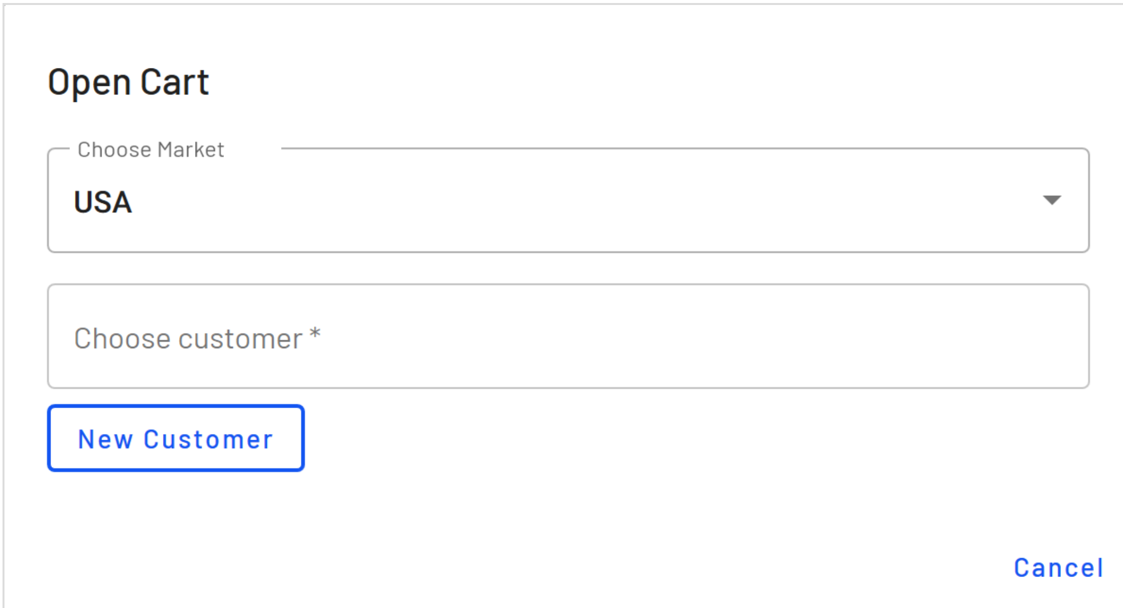
You can create a discount that allows customer service representatives to apply refunds to customer carts for loyalty, compensation for problems, and so on. To do this, create a discount for this purpose, enter a discount amount, and a coupon code. Then, train your CSRs (customer service representatives)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

Adding a new customer and cart

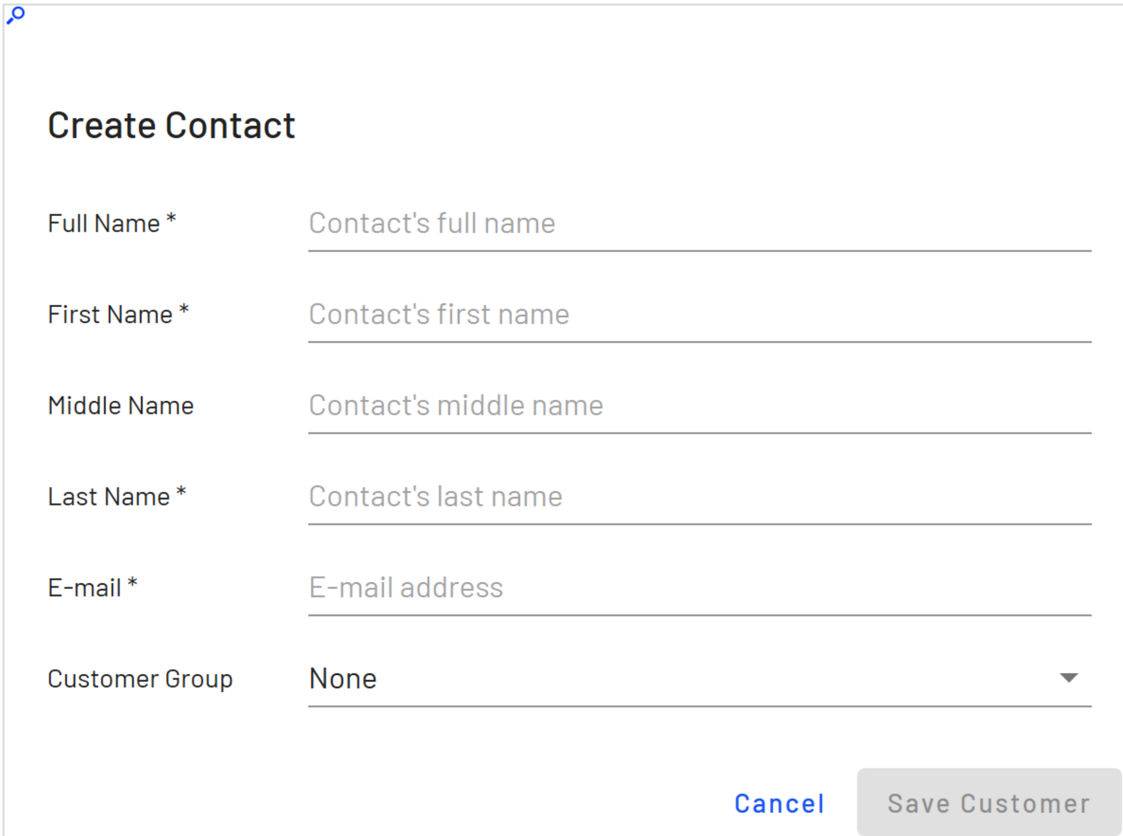
You can create a new customer and his or her cart from the **Order Management** screen. Note that if a customer already has a cart for a market, you cannot create another cart for that market.

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

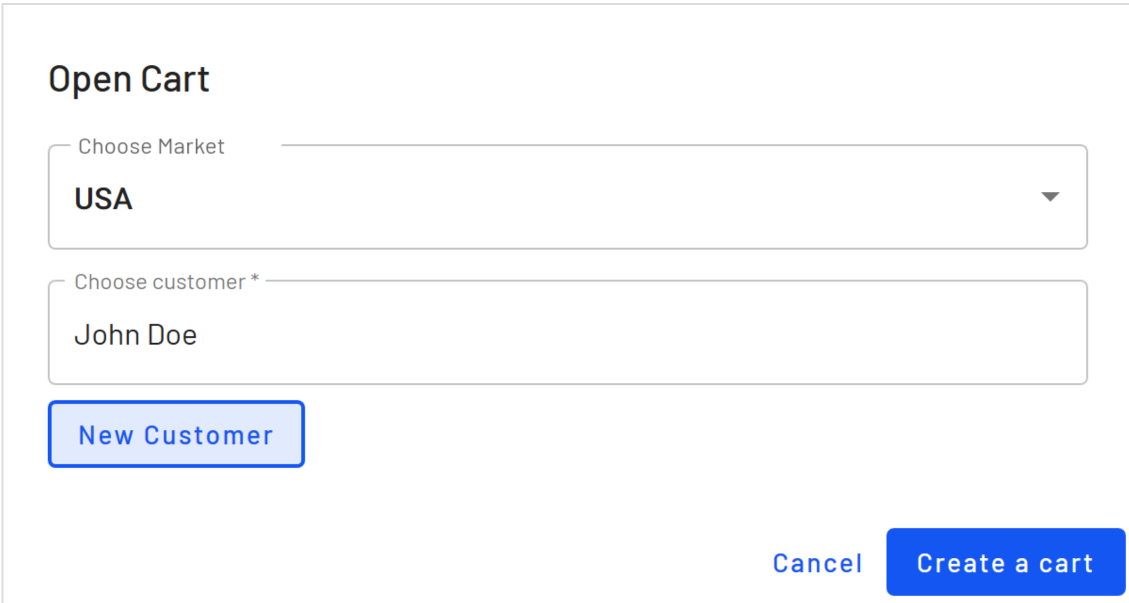
3. Click **New Customer**.



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



5. Click **Create a cart**.



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

See also **Converting a cart to a purchase order** 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.

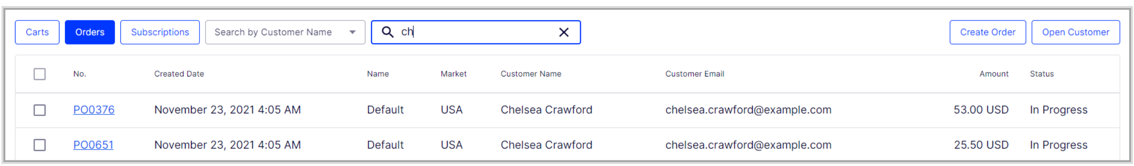
While the purchase order's status is **In Progress**, you can edit any of its information (shipping address or method, line items, discounts, and so) on by clicking the **Form Details** tab.

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**.



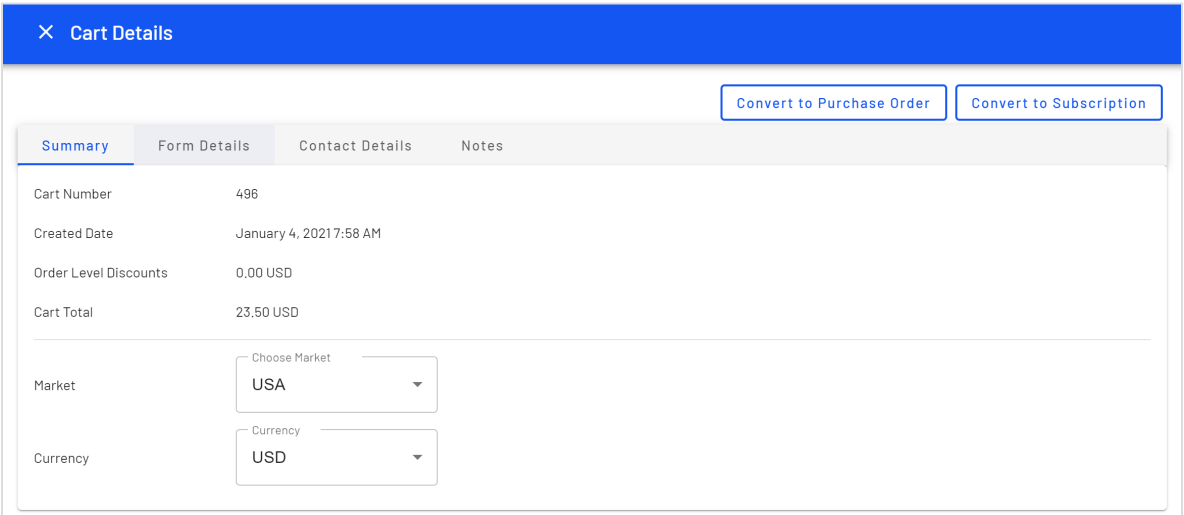
- If you chose **Search by Name**, move to the **Search** box and begin entering the customer's first name. For example, if the customer name is *Bryan Stephens*, enter *B*, *Br*, or *Bry*. Press **Enter** to execute the search.
  - You can enter the entire name, but this takes longer.
  - As you enter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

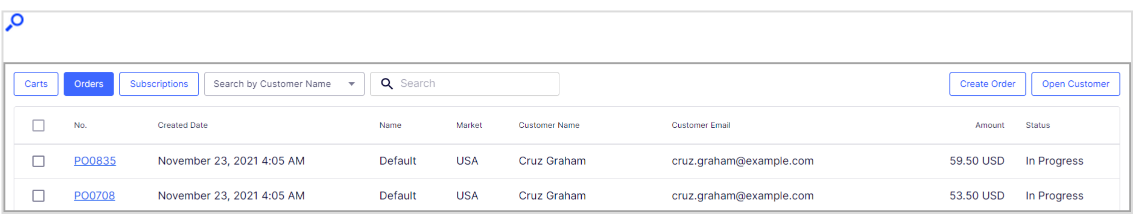
Use the **Cart Details** screen to convert a cart to a purchase order.



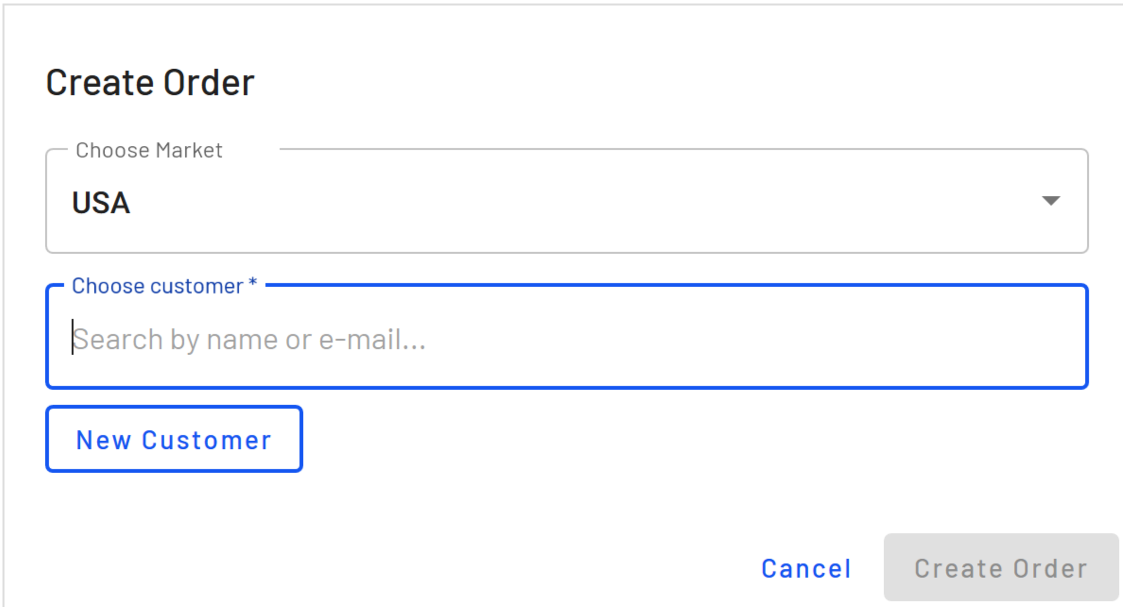
Creating an order

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**.

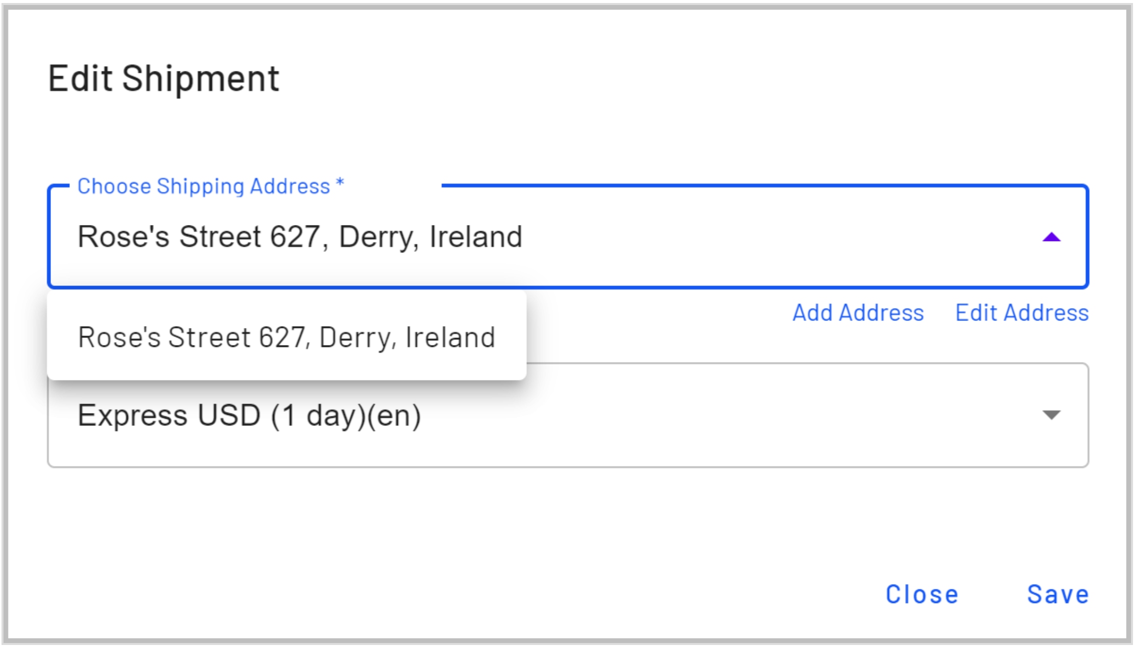


2. Choose the order's market.



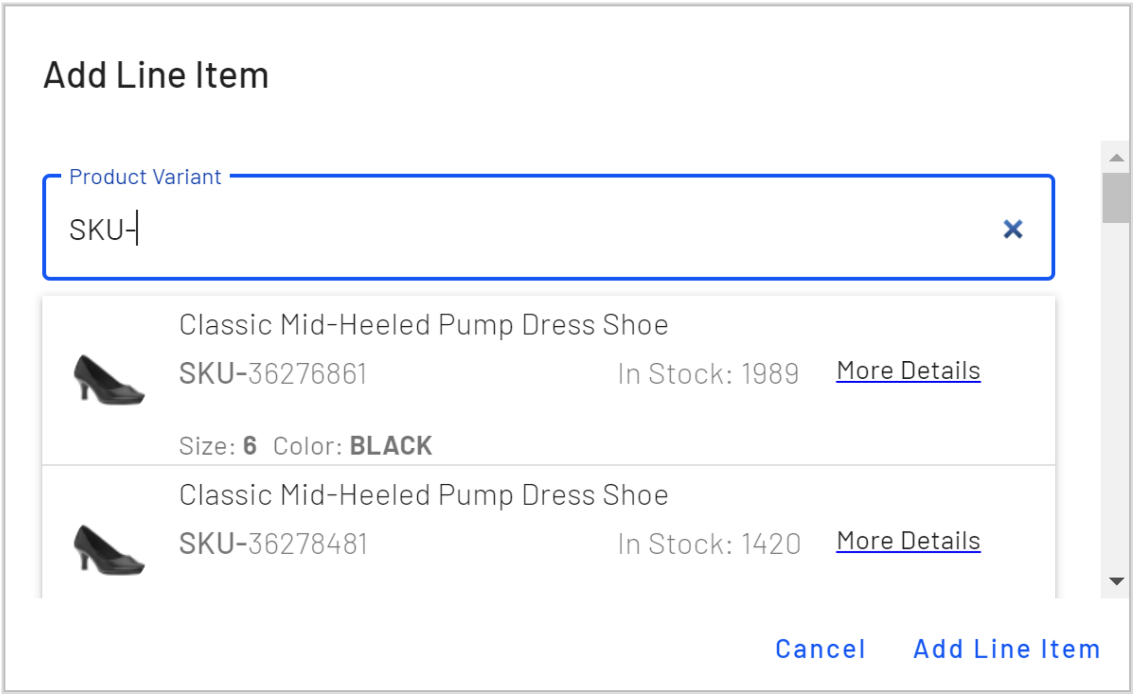
3. Choose an existing customer or create a new one.
   - To find an *existing* customer, enter any part of the customer name or email address. A list of matching customer names appears. Select the customer.
   - To enter a *new* customer, click **New Customer**. The **Create Contact** dialog appears.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

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



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

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



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

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

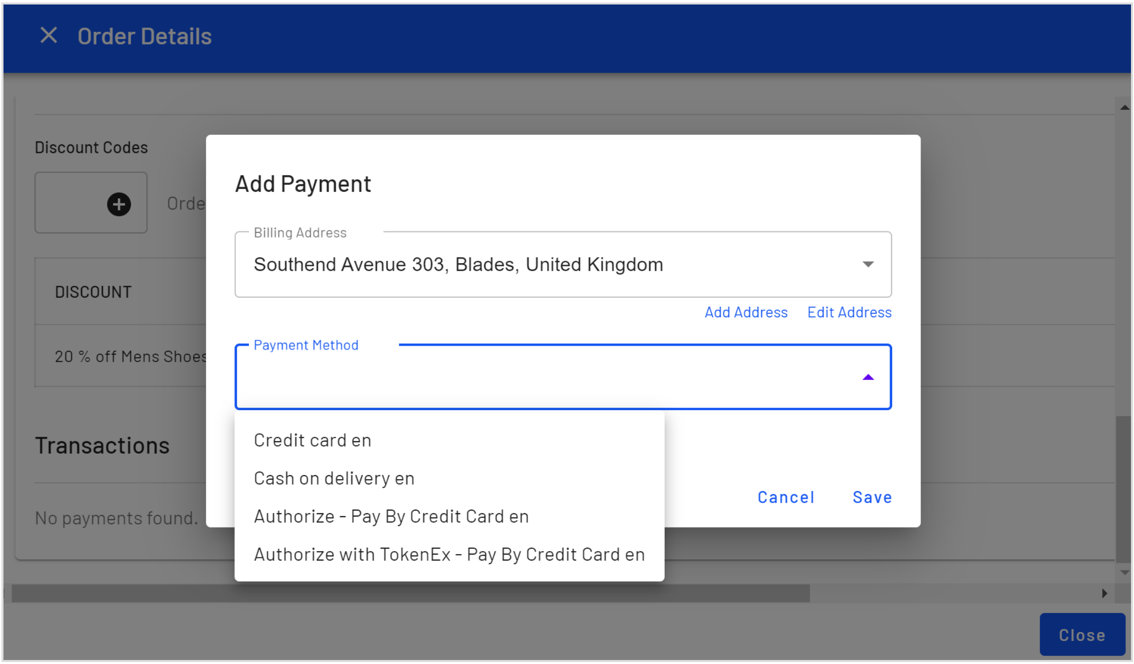
11. Choose a quantity and price. The default placed price appears, but you can change it.
12. Click **Add Line Item**.
13. After adding at least one item, click **Create Order**.

Although the order is created, it must be paid before it can be released.

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.

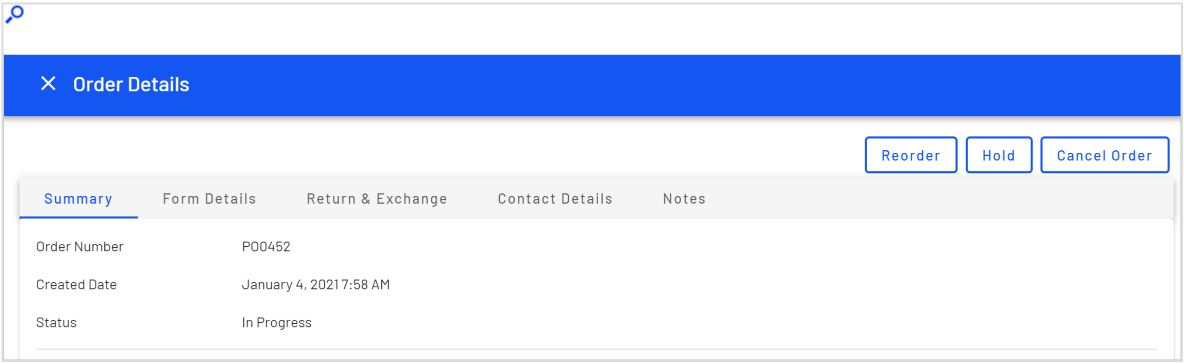


5. Click **Save**.

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.

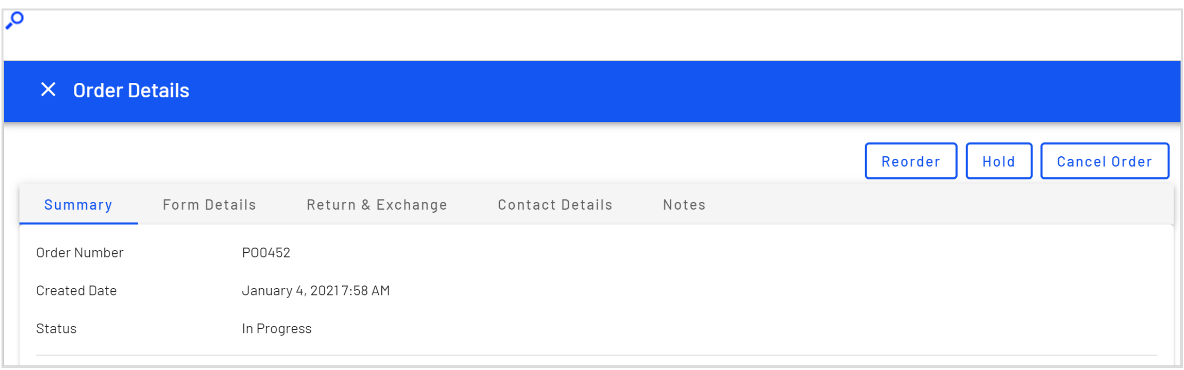
To place an order on hold, click **Order Management** and select the order. Then, on the **Order Details** screen, click **Hold**.



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

If needed, you can delete an order on the **Order Management** screen.

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

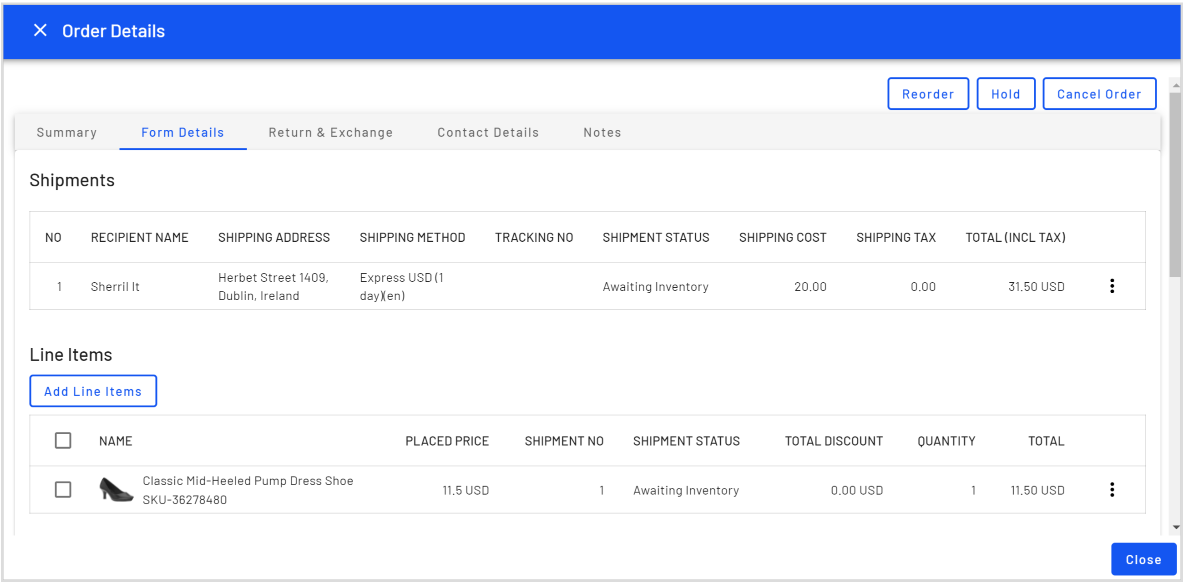
1. In the top left corner of the Order Management screen, click the **Orders** button.
2. In the first column on the left, select the checkbox for each order you wish to delete.
3. In the top right corner, click **Delete Selected**.
4. Click **OK** to confirm that you wish to delete the selected order(s).

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.



Adjusting an order's shipment status

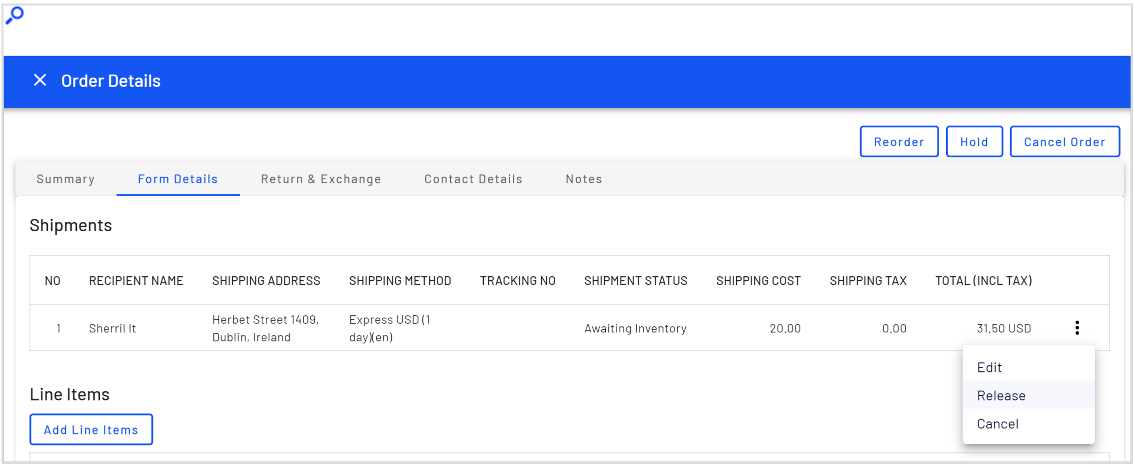
1. When an order is paid in full

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

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

   - If the quantity of all items in an order is less than the available Instock Quantity, its shipment status is set to **Inventory Assigned**.

2. When an order is paid and ready for shipping, click the **Form Details** tab and select **Release** from the context menu.



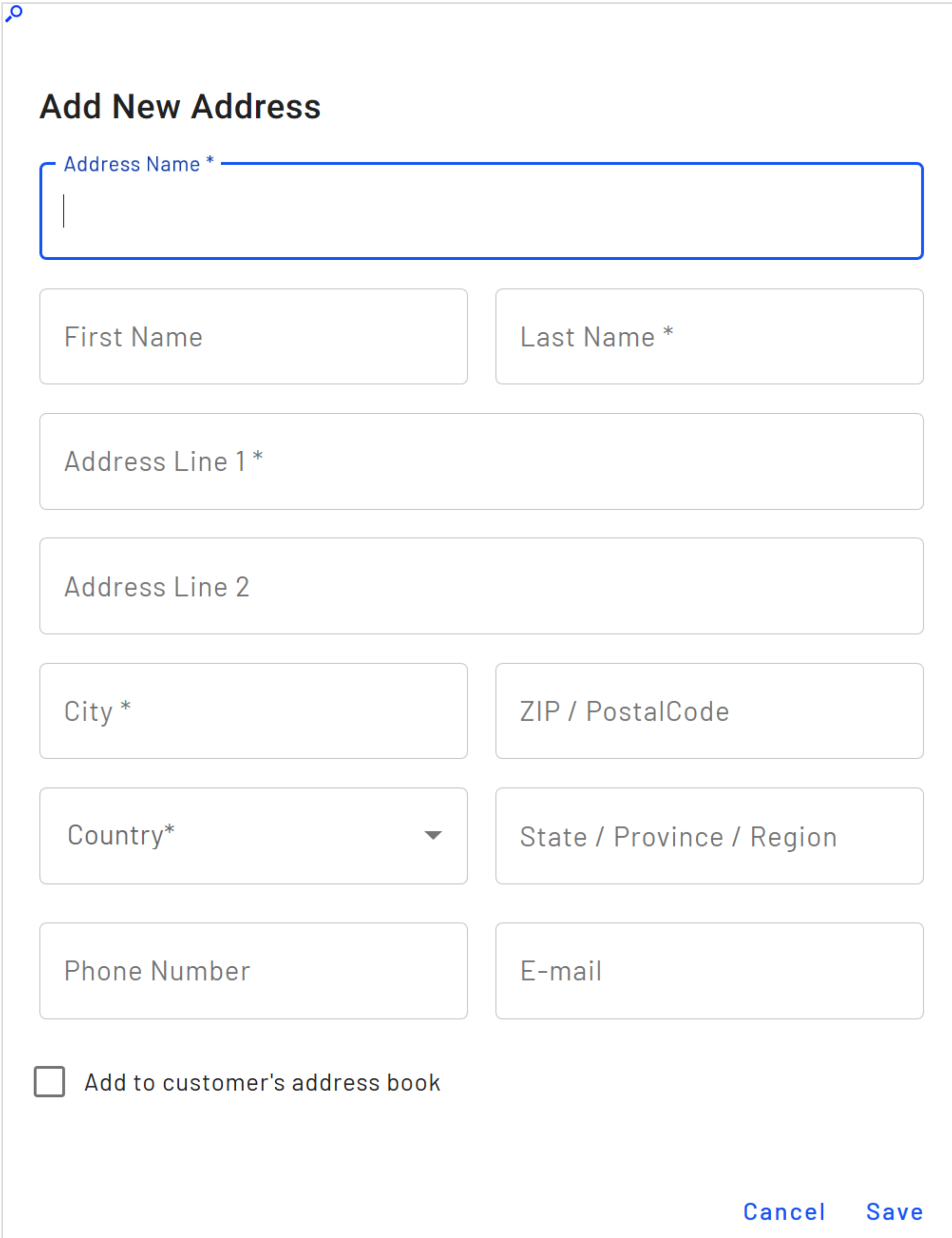
3. To prepare an order for shipping, change the shipment status to **Packing** by clicking **ADD TO PICKLIST**.
4. When the shipment is shipped, change the shipment status to **Shipped** by clicking **COMPLETE**.

Adding a new shipping address to an order

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

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

5. Enter the address information.



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

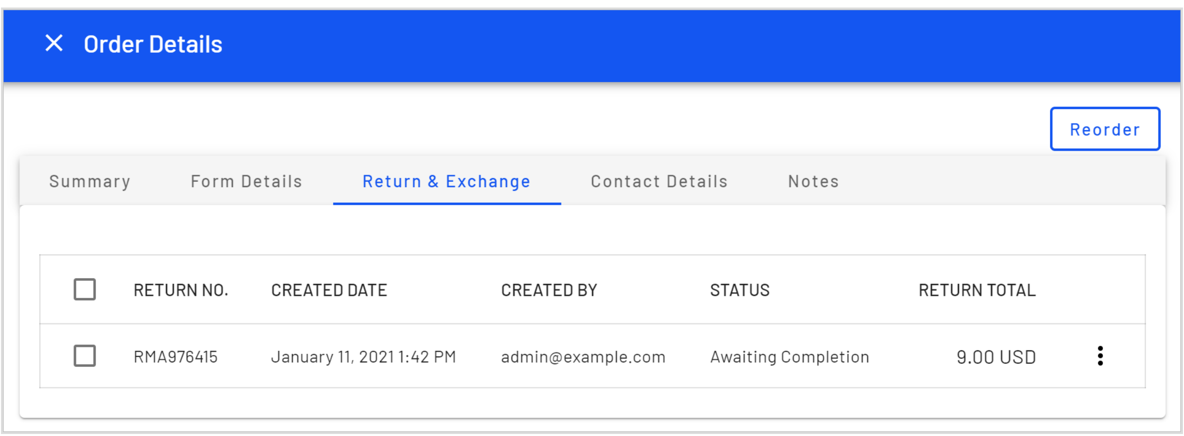
> **Tip:** Changing the customer address does not affect the order's shipping address.

Working with order returns and exchanges

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

Viewing order returns

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



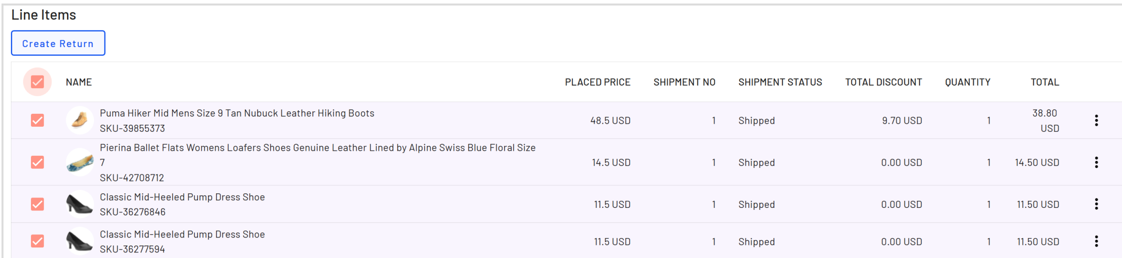
Processing an order return and refund

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

Follow these steps to return one or more order items.

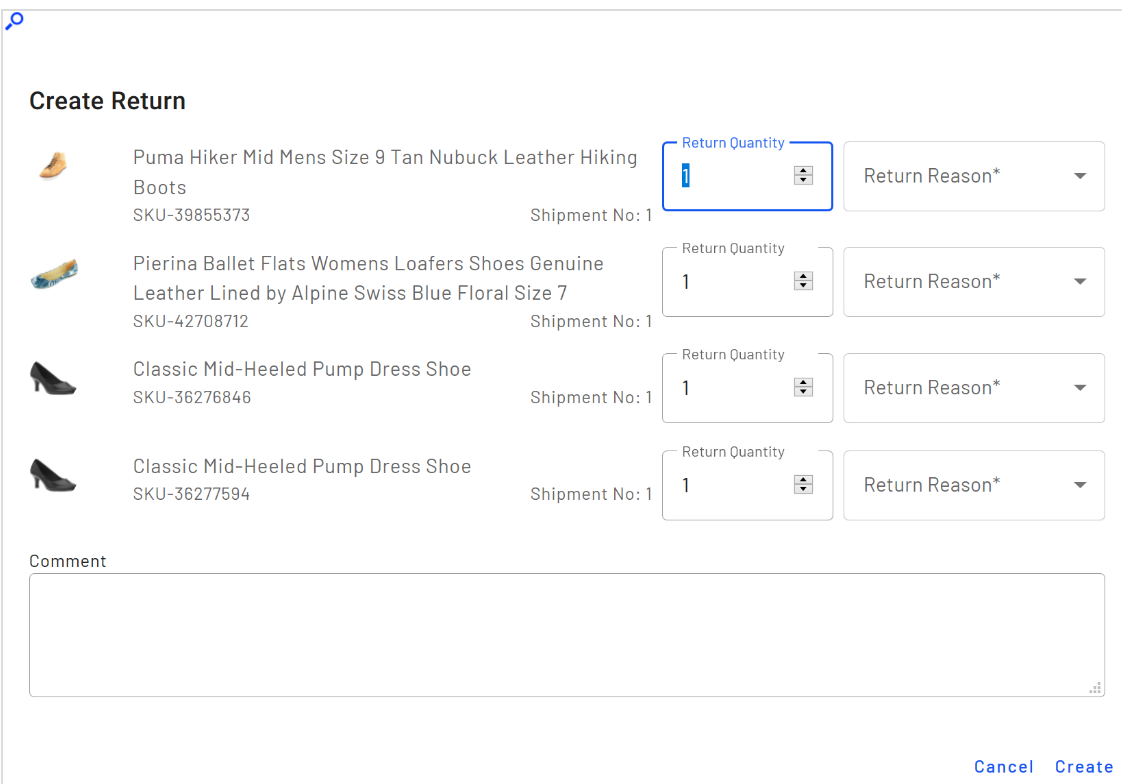
1. From the Order Management screen, select **Orders**.
2. Select the order whose items you want to return.

3. Click the **Form Details** tab.
4. Click in the box to the left of the items you want to return. To return all items, click the box in the column header row.

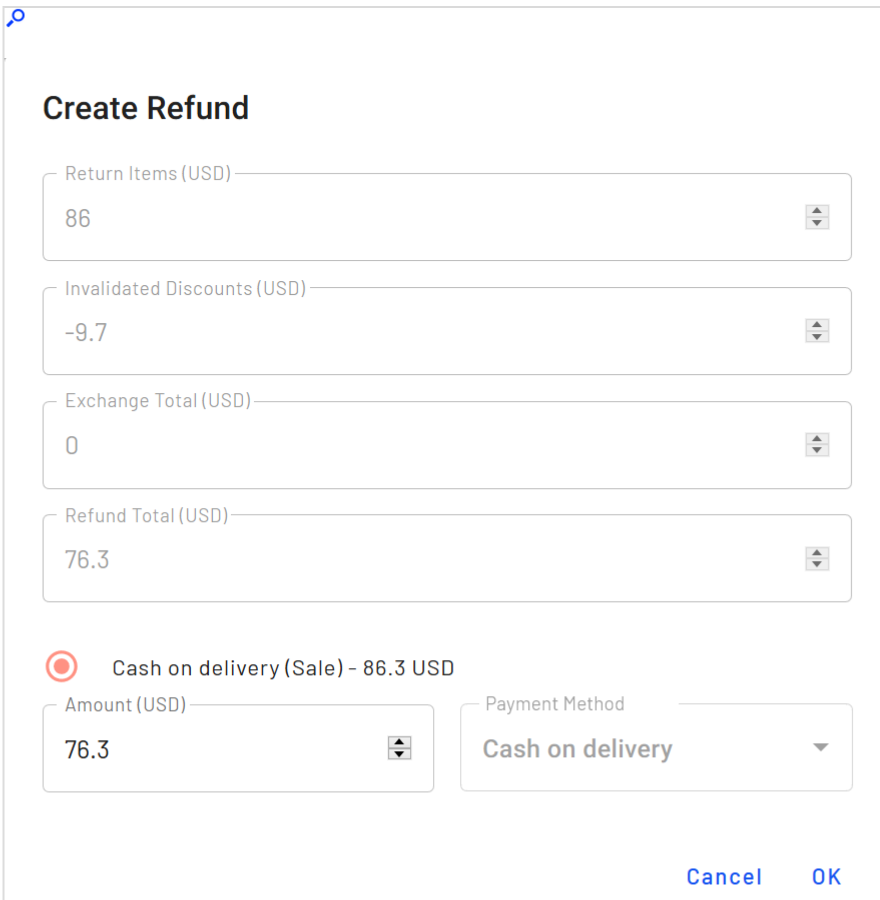


> **Note:** You can also click the item's context menu then **Create Return**.

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



6. Click **Create**.
7. A new screen appears with the return information. If everything is correct, click **Acknowledge Receipt Items**.
8. Click **Complete Return**. The Create Refund screen appears.
9. Verify that the refund amount is correct, select a payment method and click **OK**. If necessary, you can adjust the refund amount but it cannot exceed the original charge.



Canceling an order return

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

Processing an exchange order

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

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

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

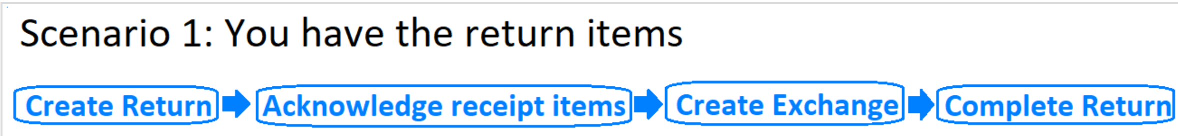
The Order Management screen calculates the refund amount (if any). If the CSR changes the refund amount, a warning appears but the CSR is allowed to complete the transaction.

Creating an exchange order

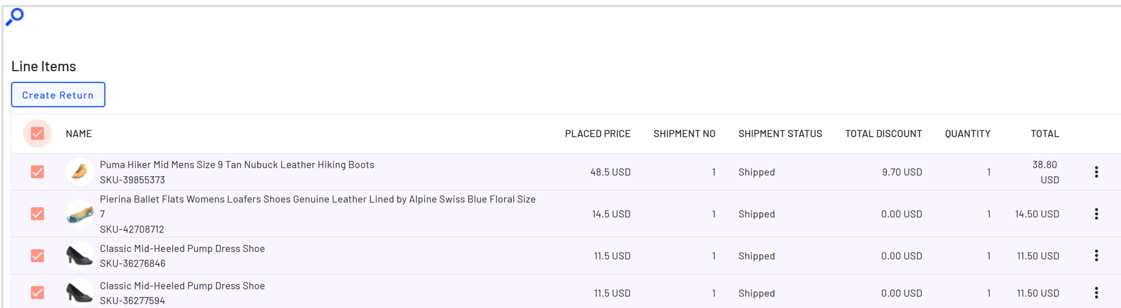
You can create an exchange order at any time. Initially, its status is **Awaiting Exchange**. When you complete the return, the order's status changes to **In Progress**.

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

Creating an exchange order if you received the returned items



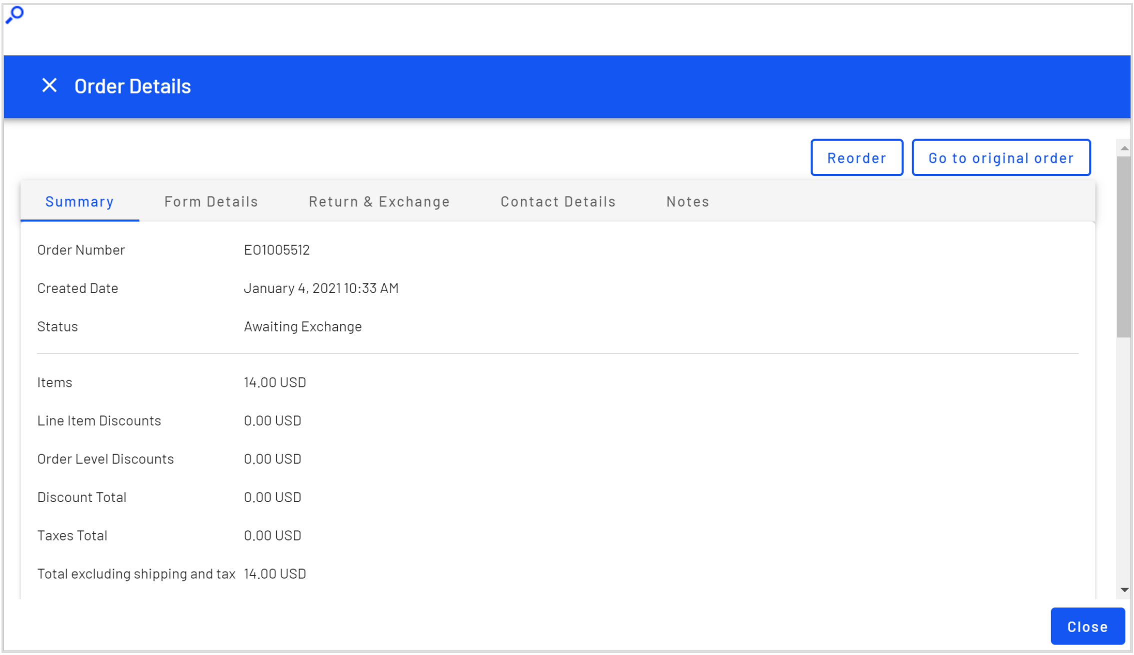
1. Select a *Completed* order and click the **Form Details** tab.
2. Under **Line Items,** select items that you want to exchange.
3. Click **Create Return**.


Line Items
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-36277594	11.5 USD	1	Shipped	0.00 USD	1	11.50 USD

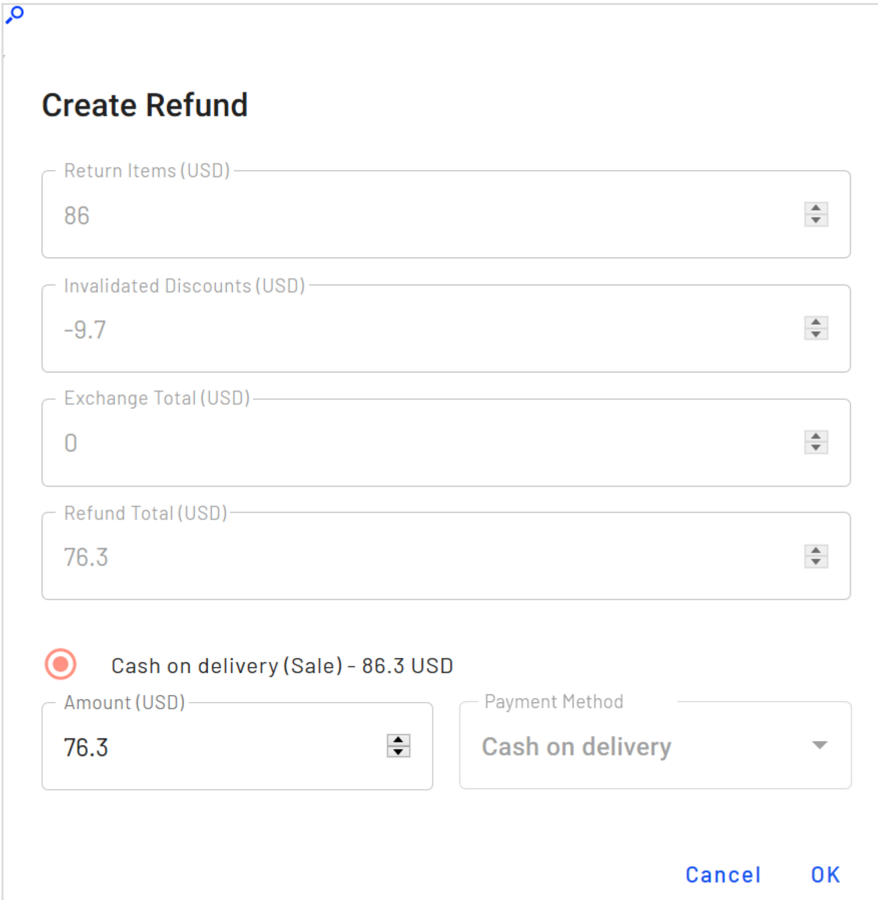
4. Select the **Return Quantity** if necessary.
5. Submit a Return Reason and an optional comment.
6. Click **Create**.
7. Click **Acknowledge Receipt Items**.
8. Click **Create Exchange**. The Prepare Order screen appears.
9. Under **Shipments**, select the shipment and choose **Edit** from the context 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**.



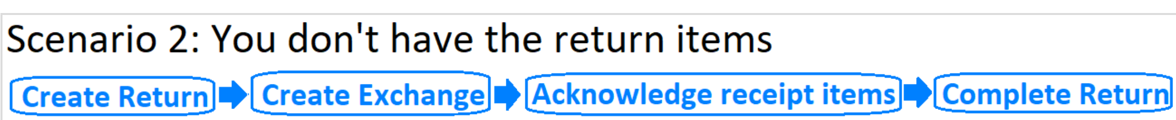
16. Click the **Return & Exchange** tab.
17. Select the return order and click **View** on the context menu.
18. Click **Complete Return**.

19. If necessary, modify the refund amount.



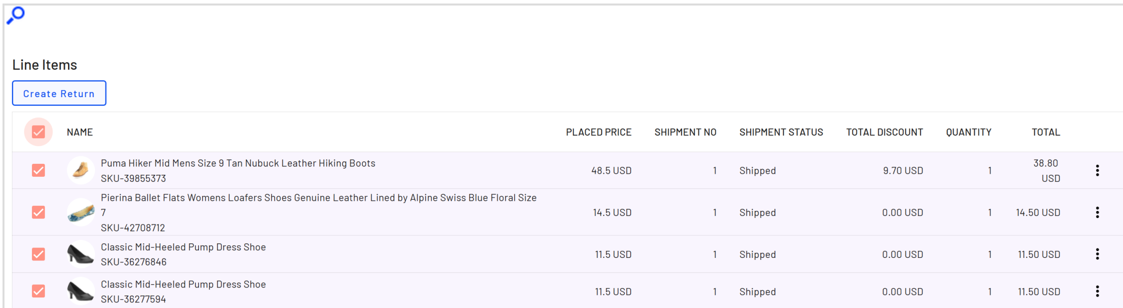
20. Click **OK**.

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



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

3. Click **Create Return**.



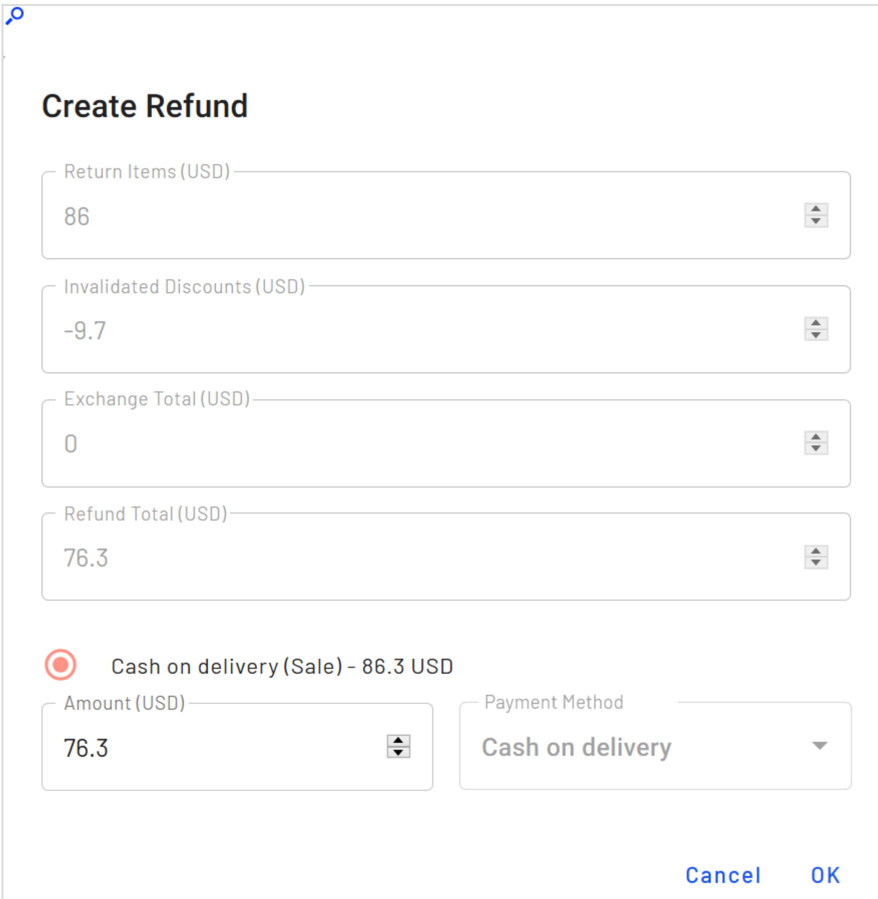
4. Select the **Return Quantity** if necessary.
5. Submit a Return Reason and an optional comment.
6. Click **Create**. The Return Details screen appears.
7. Click **Create Exchange**.

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

18. On the **Order Details** screen, select the return order and click **View** from the context menu.

19. Click **Complete Return**.

20. If necessary, modify the refund amount.

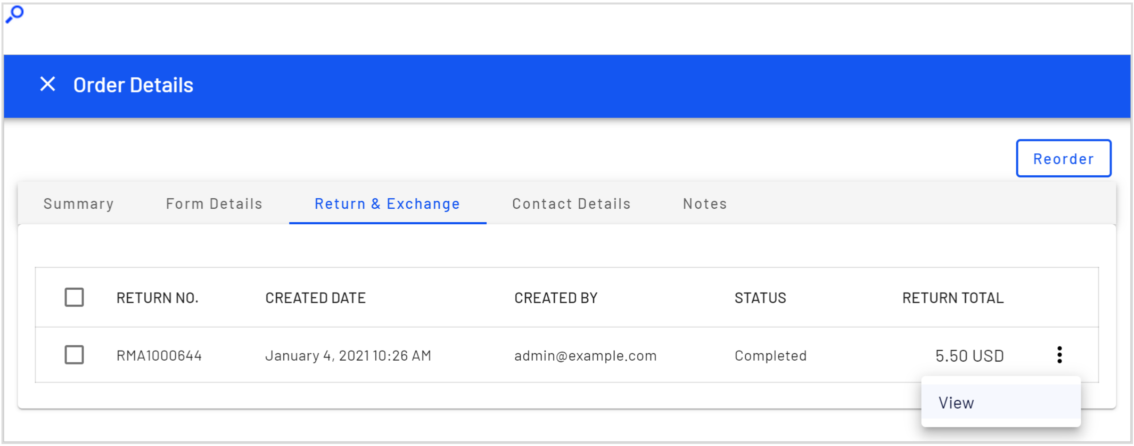


21. Click **OK**.

Viewing an exchange order

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

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



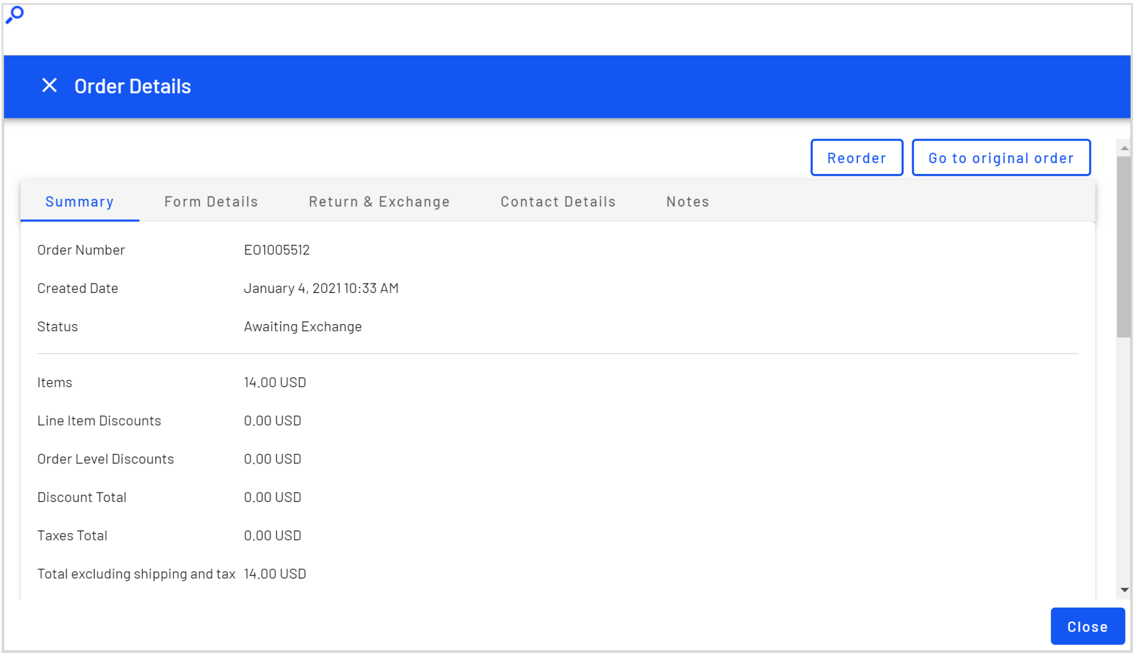
5. Click **View Exchange**.

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

Viewing an exchange order's parent order

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

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



Working with subscriptions

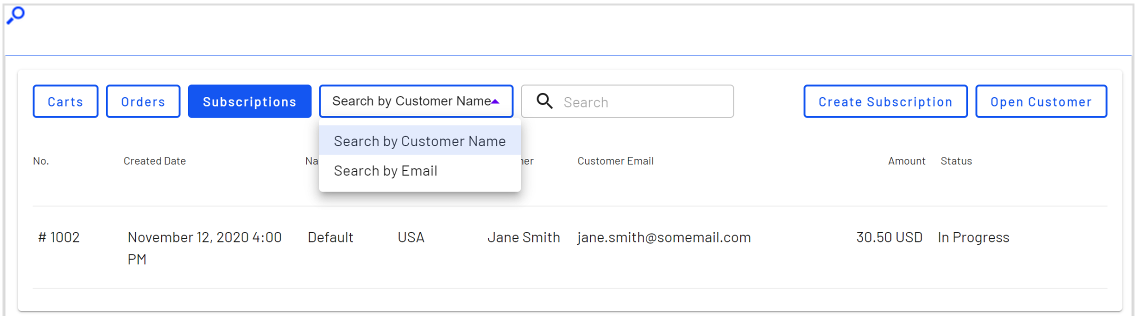
This topic describes how to work with subscriptions on the Order Management screen.

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

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

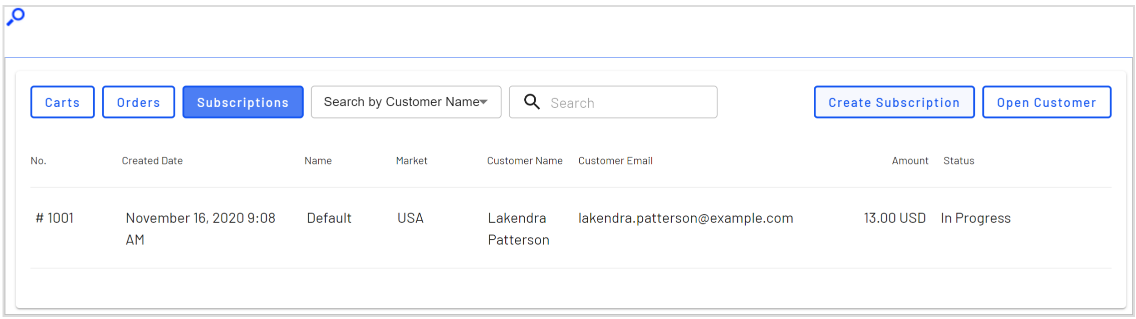


- If you chose **Search by Name**, move to the **Search** box and begin entering the customer's first name. For example, if the customer name is *Bryan Stephens*, enter *B*, *Br*, or *Bry*. Press **Enter** to execute the search.
  - You can enter the entire name, but this takes longer.
  - As you enter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

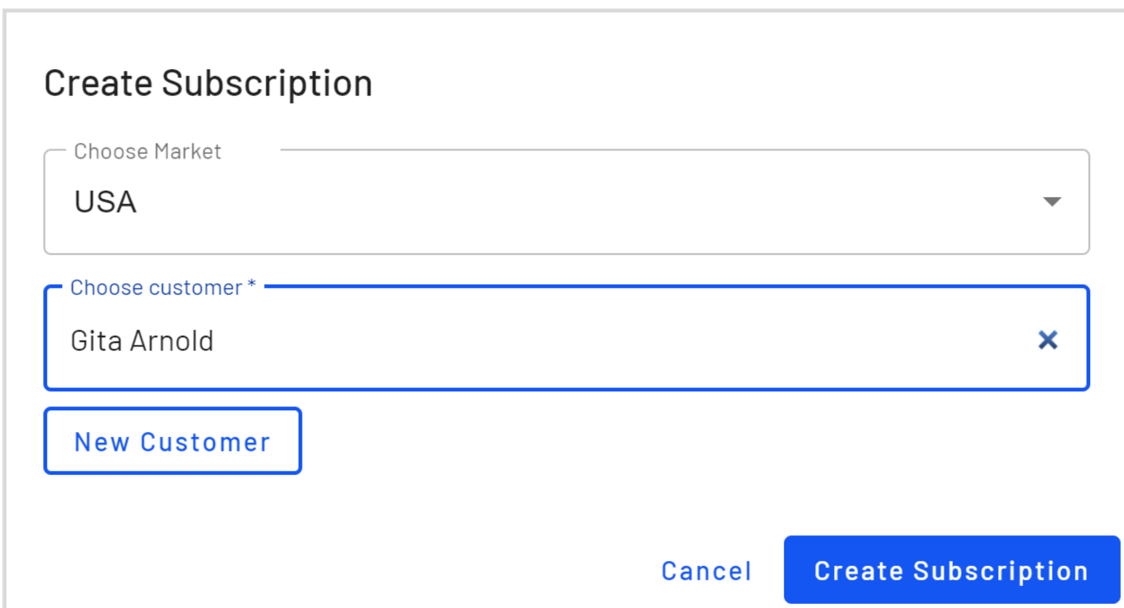
3. Choose the subscription that you want to view. The information is displayed in the following tabs:
   - **Summary**. General information, such as market and currency, order number, created date, items, shipping, and discount information.
   - **Form Details**. Shipping address and method, line items, discounts, and payments.
   - **Contact Details**. Customer name and email address. You can view and edit customer information by clicking **Edit** 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**.



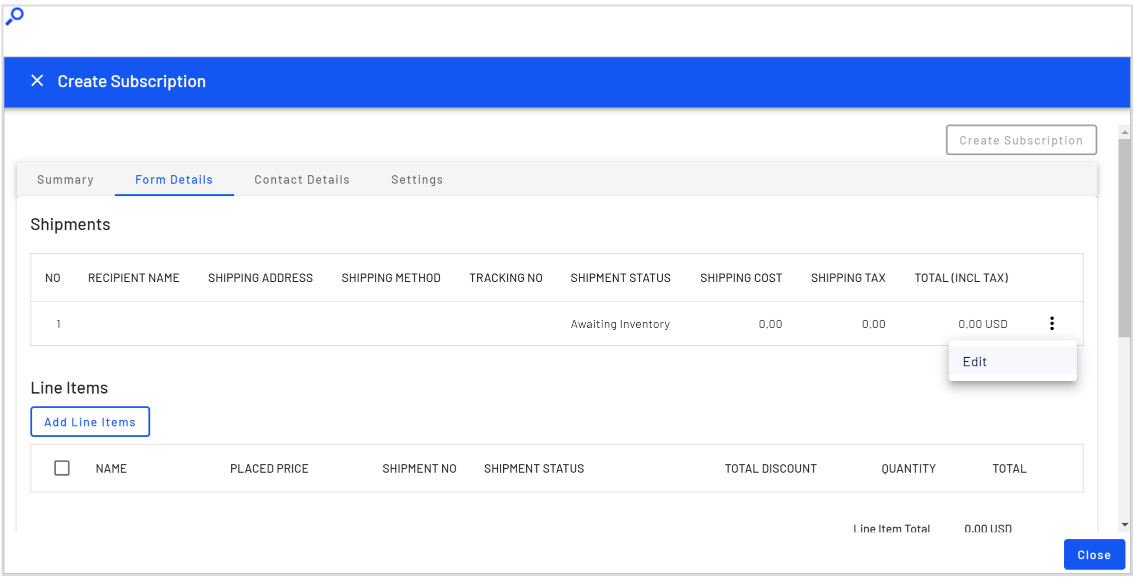
3. Choose the subscription market.



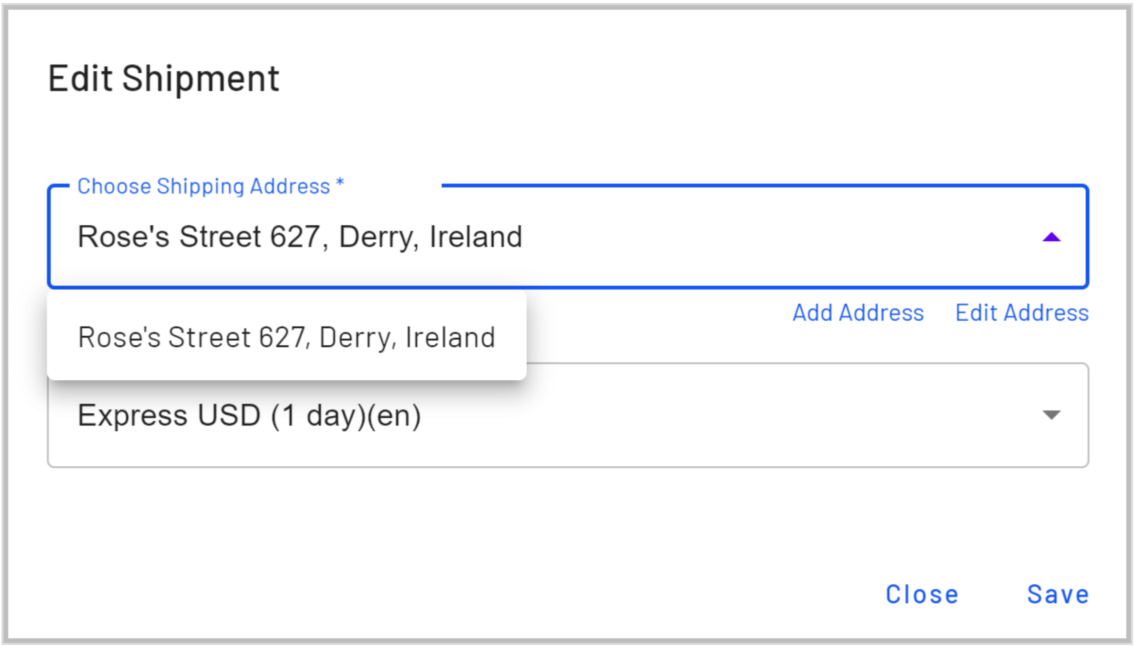
4. Choose an existing customer or create a new one.
   - To find an *existing* customer, enter any part of the customer name or email address. A list of matching customer names appears. Select the customer.

- To enter a *new* customer, click **New Customer**. The **Create Contact** dialog appears. Enter the customer's name, email address, and customer group.

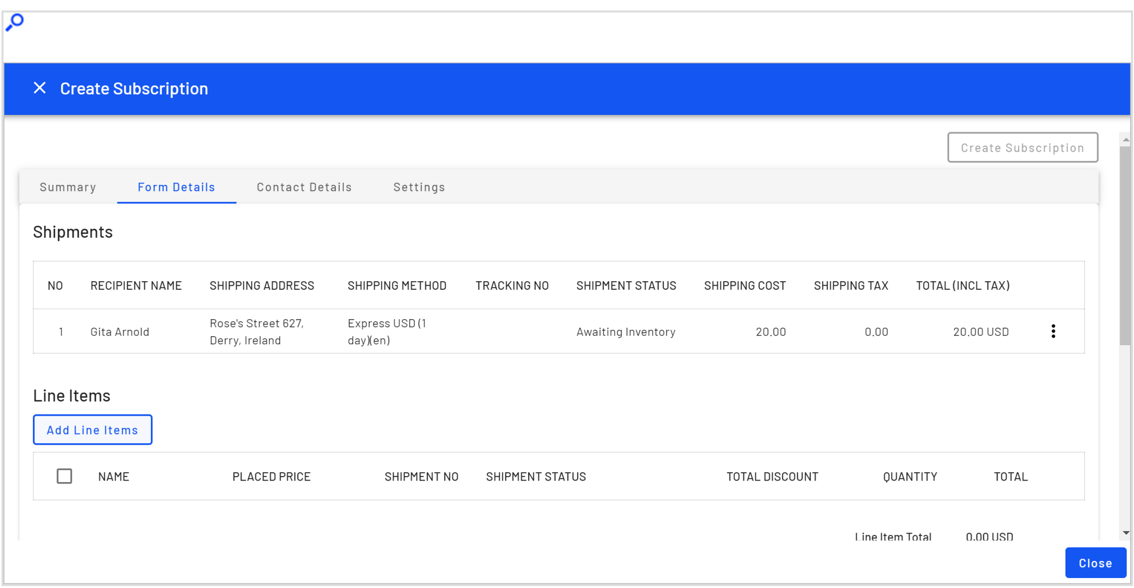
5. Click **Create Subscription**.
6. Click the context menu to the right of shipment 1 and click **Edit**.



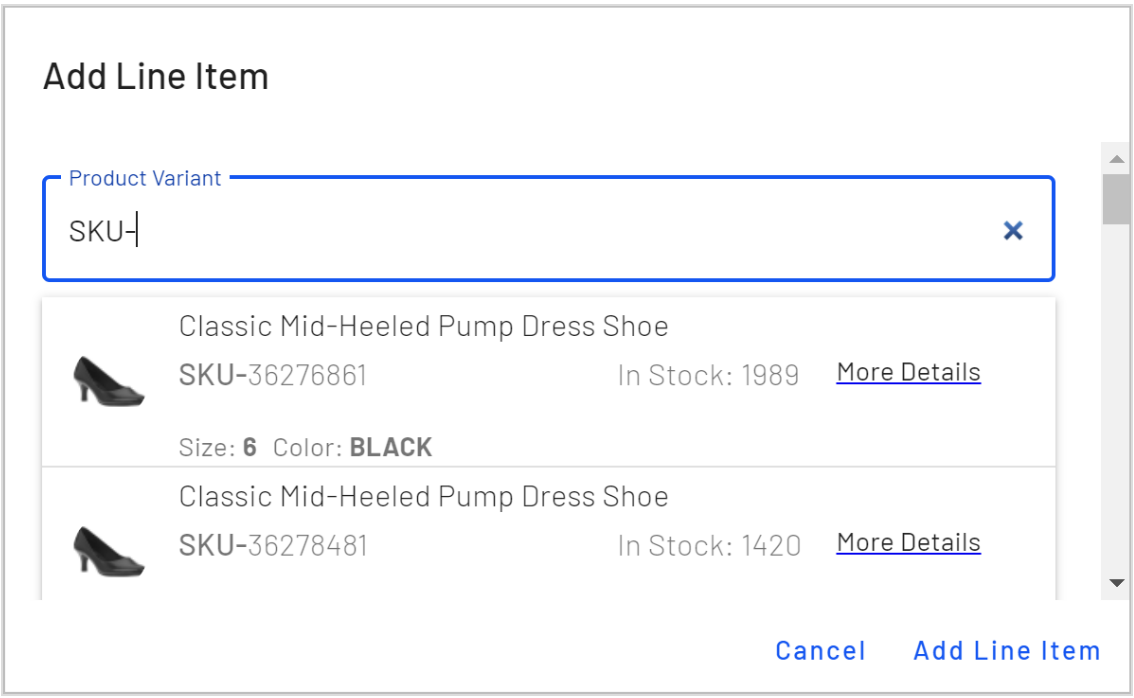
7. Enter the subscription shipping address and shipping method.



8. Click **Save**.
9. Click **Add Line Items**.



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

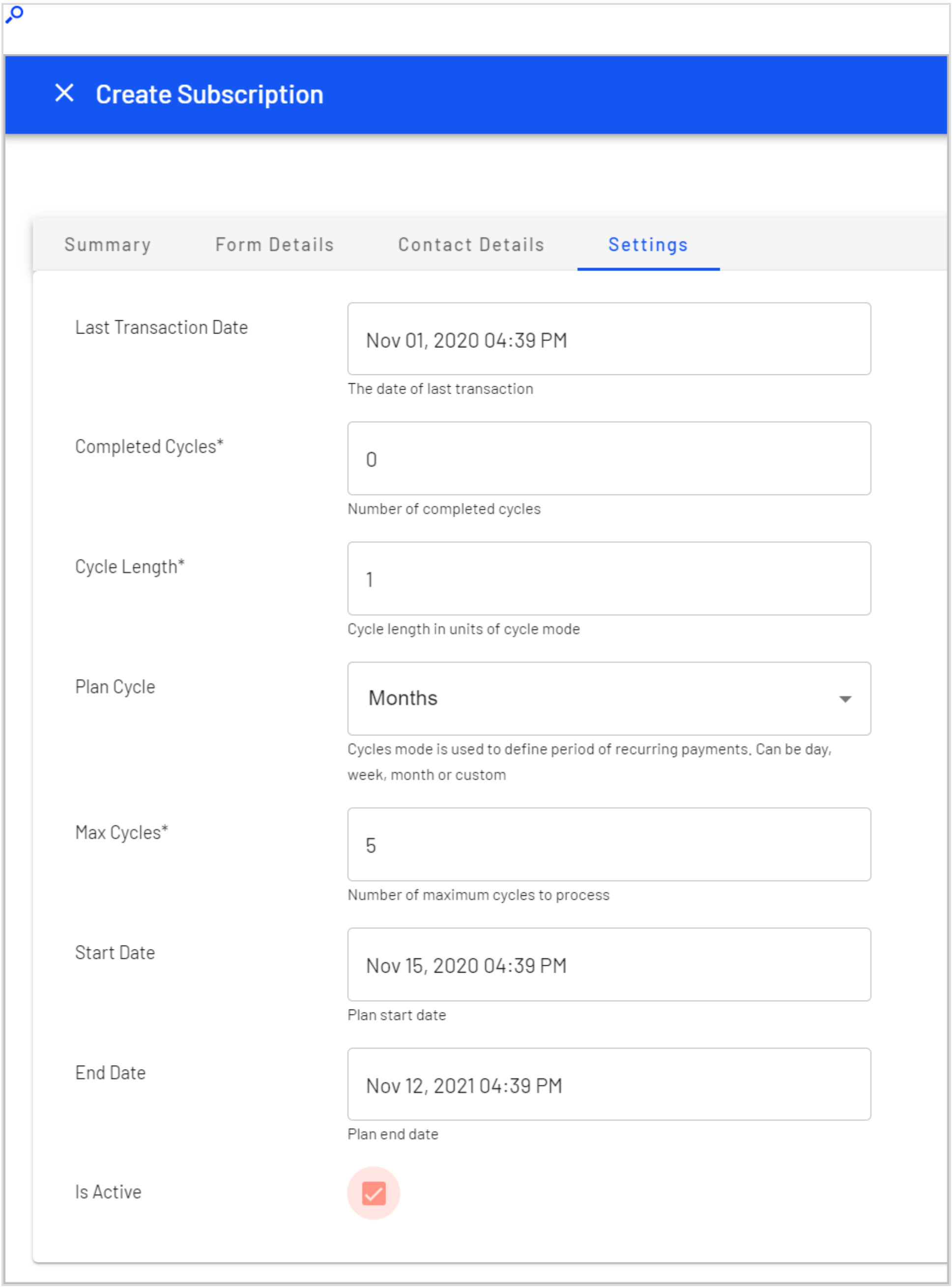


11. Search results appear. Select the line item you want to add.

> **Tip:** To view detailed information of the line item, click **More Details**. The respective product page on your e-commerce web-site 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.



- **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)

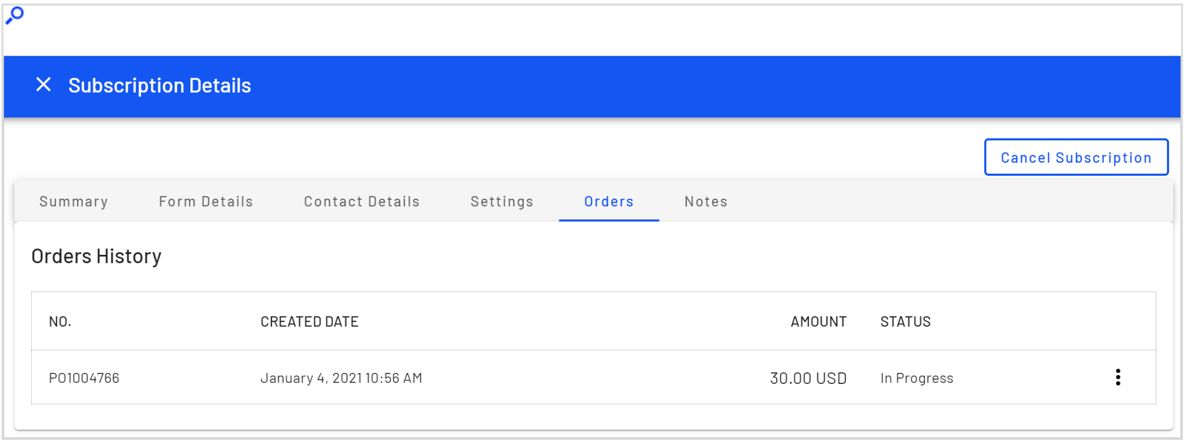
  You can choose from the following plan cycles, which determine how often the customer is charged.

  - **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.

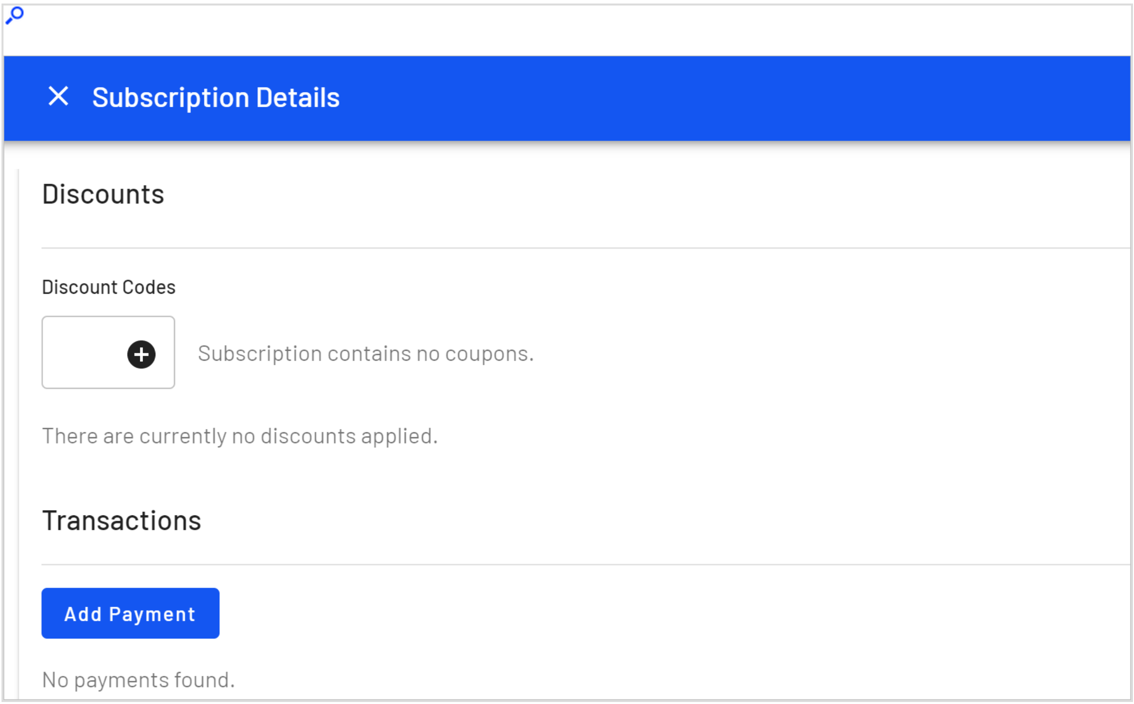


The subscription begins when the first purchase order is generated. You can create the purchase order manually, or by running the subscription scheduled job (requires administration access).

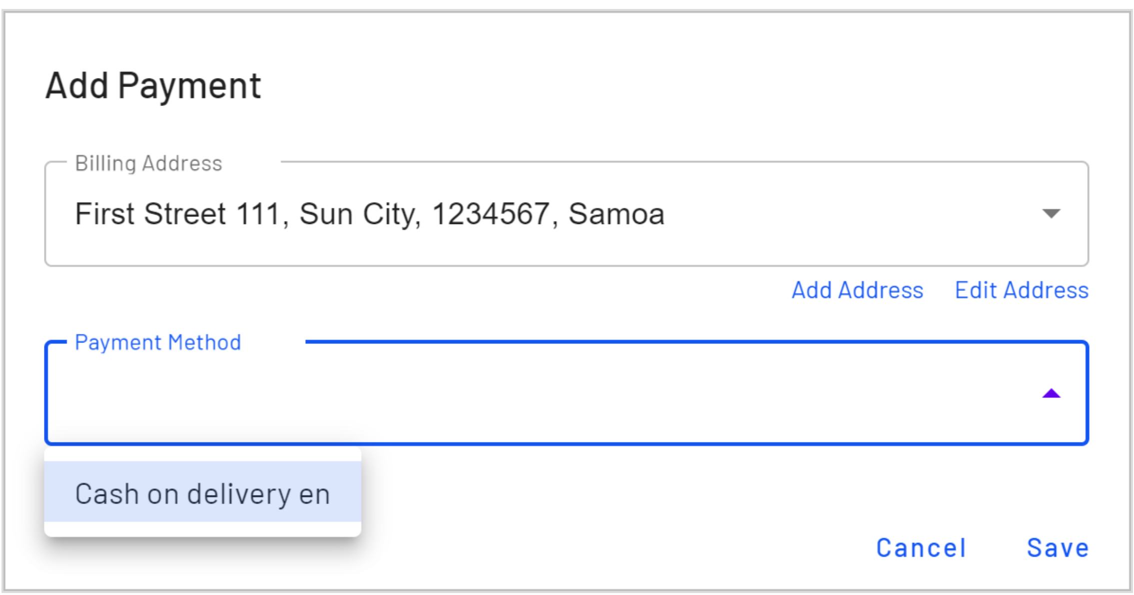
Creating the first purchase order manually

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.

4. Click **Add Payment**.

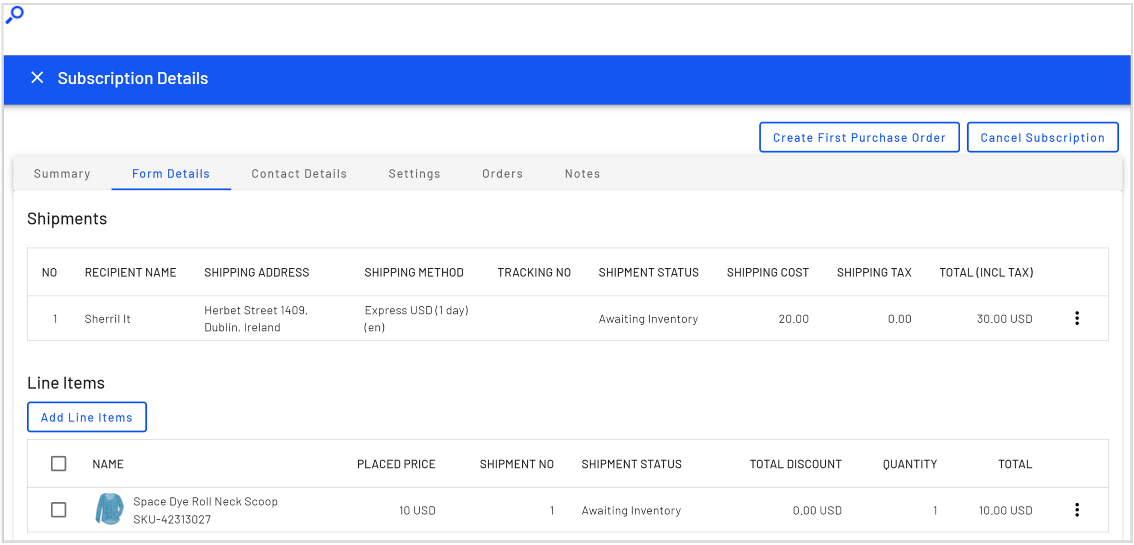


5. Select a billing address and payment method.



6. Click **Save**.

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



The **Create First Purchase Order** button disappears after creating the first purchase order manually, or if the 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.

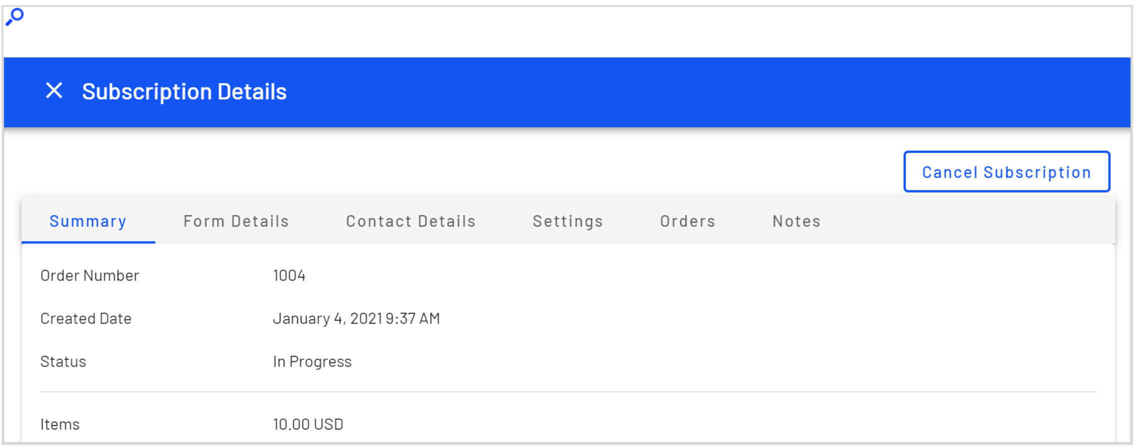
When a payment is added to a subscription, the customer is not charged. The subscription simply collects payment information until converted to a purchase order. The customer is charged once the purchase order is generated for the first time (and through subsequent purchase orders).

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

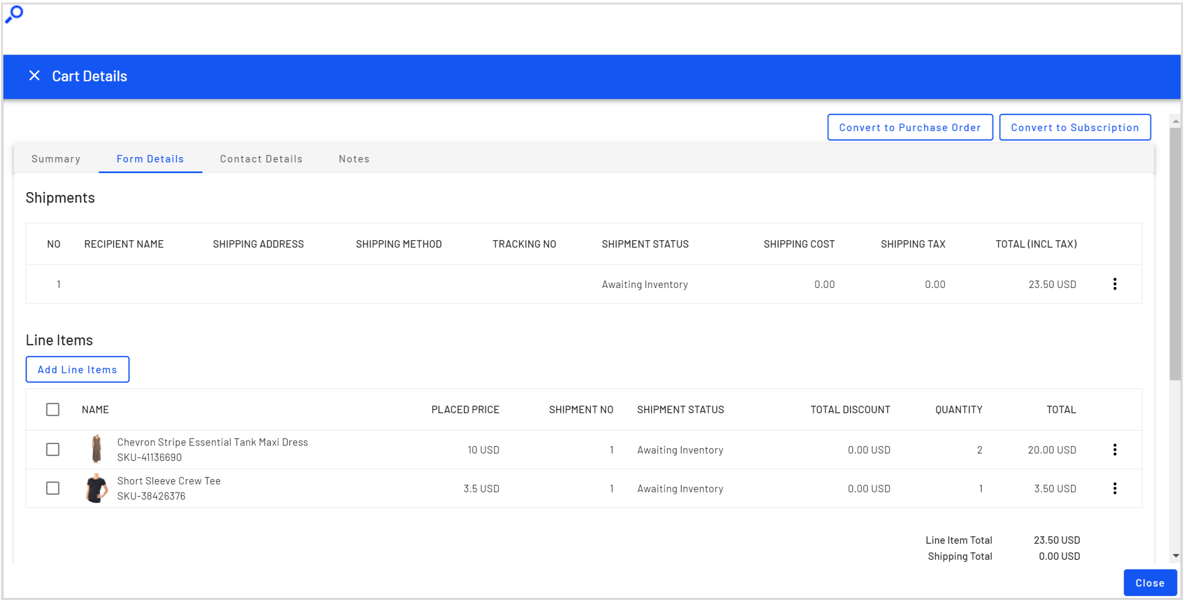
1. From the Order Management screen, click **Subscriptions**.
2. Click the subscription you want to cancel.
3. On the **Subscription Details** screen, click **Cancel Subscription**.



Converting a cart to a subscription

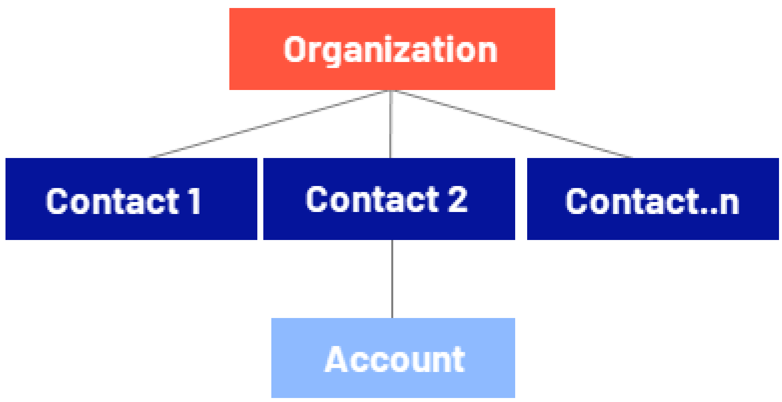
Typically, a shopping cart is converted to a purchase order when a customer proceeds to checkout and finalizes the purchase. You can also convert a cart to a subscription for further processing. For example, you want to generate recurring payments for the products added to the cart.

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


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
NAME
PLACED PRICE
SHIPMENT NO
SHIPMENT STATUS
TOTAL DISCOUNT
QUANTITY
TOTAL
Chevron Stripe Essential Tank Maxi Dress
SKU-41136690
10 USD
1
Awaiting Inventory
0.00 USD
2
20.00 USD
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

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.

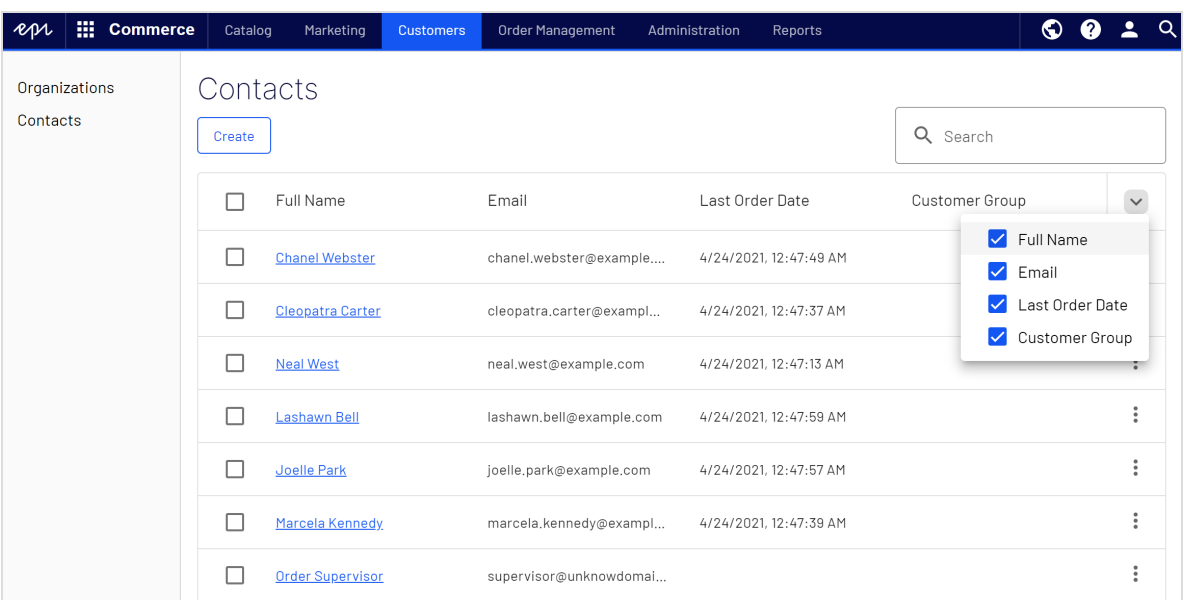
Contacts

When a visitor registers on a site's front-end (to make a purchase for example), 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.

Managing contacts and organizations

Customer contacts and organizations are managed from the **Customers** view in Optimizely Commerce.



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 user access to appropriate functionality in Commerce.

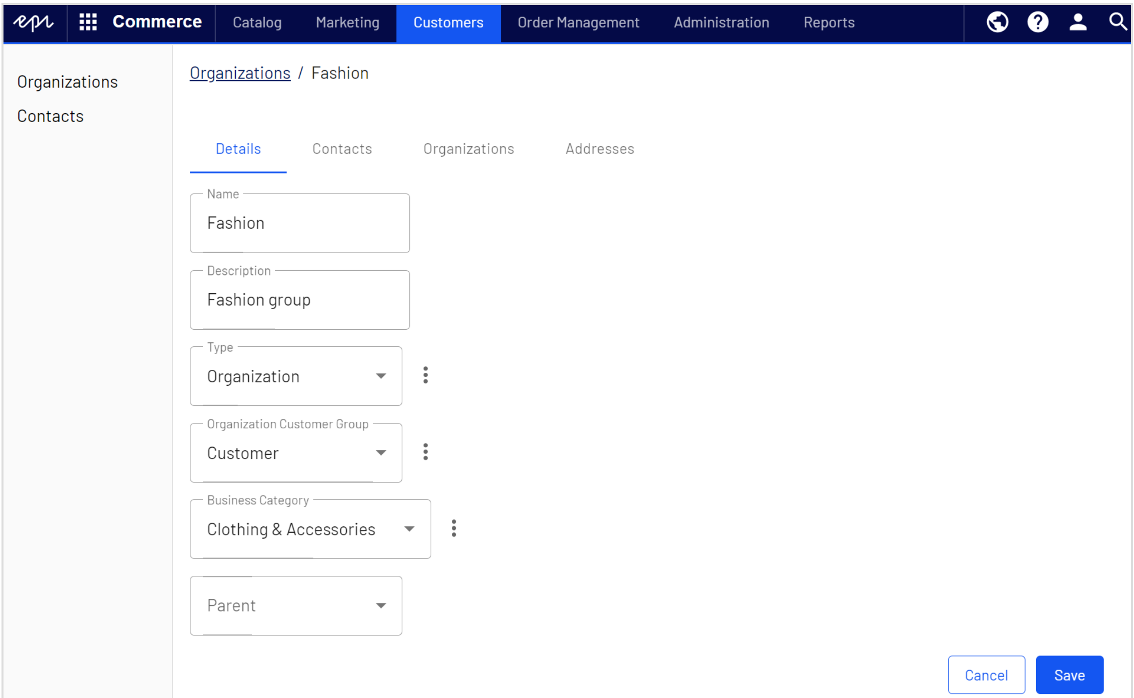
Organization hierarchies

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.

Creating and editing organizations

1. Open the **Customers** view and select **Organizations**.
2. In the **Customers** overview, click **Create** to add a new organization, or select **Edit** in the context menu to modify an existing one.

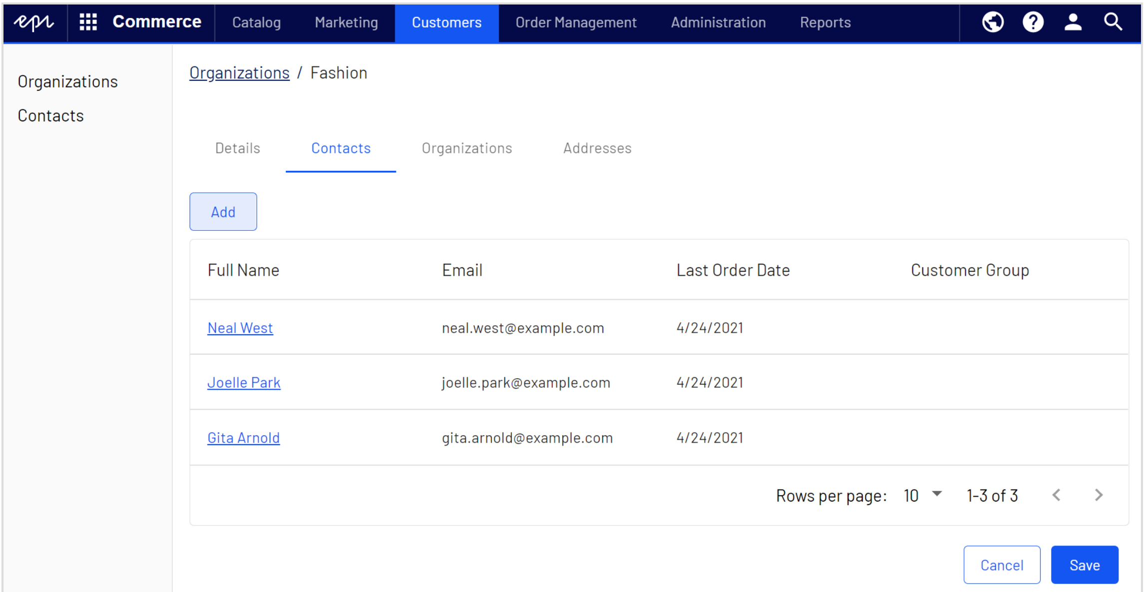
3. Enter data as described in the following for the **Details** tab.



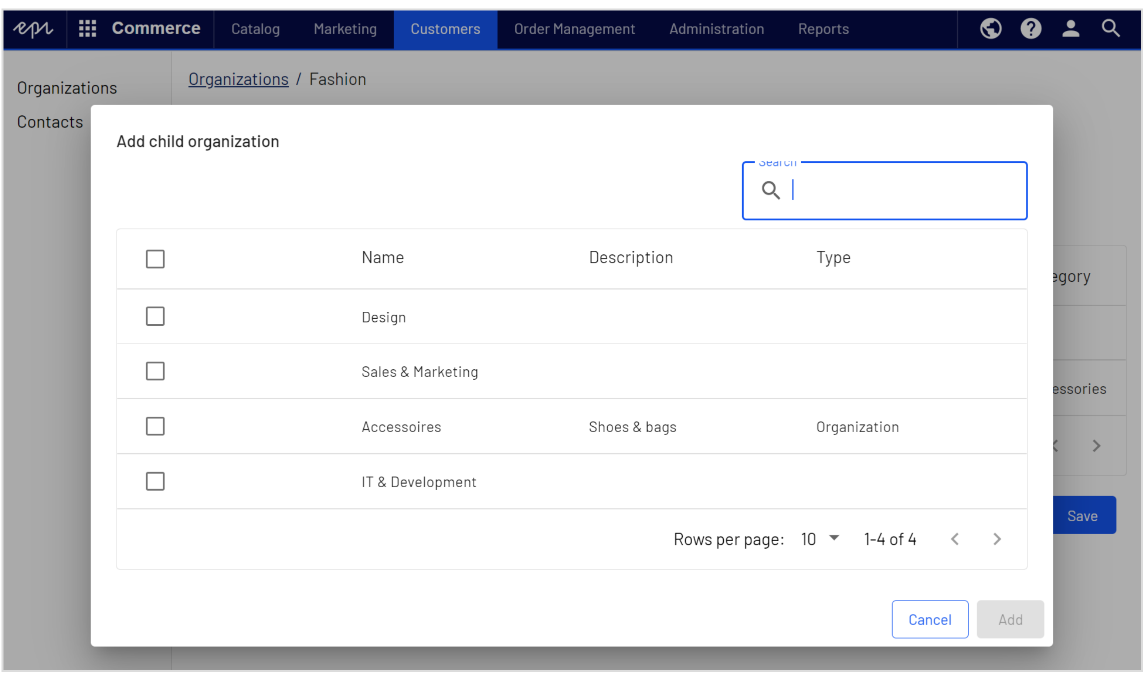
- **Name**. Enter the organization name. (This is the only required field.)
- **Description**. Enter details about the organization.
- **Type**. Assign a type to the organization. If the organization is a parent organization, click **Organization**. If the organization is a sub-organization, click **Organization 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 subunit (child) of a larger organization, select the parent in the drop-down list.

4. Click **Save**.

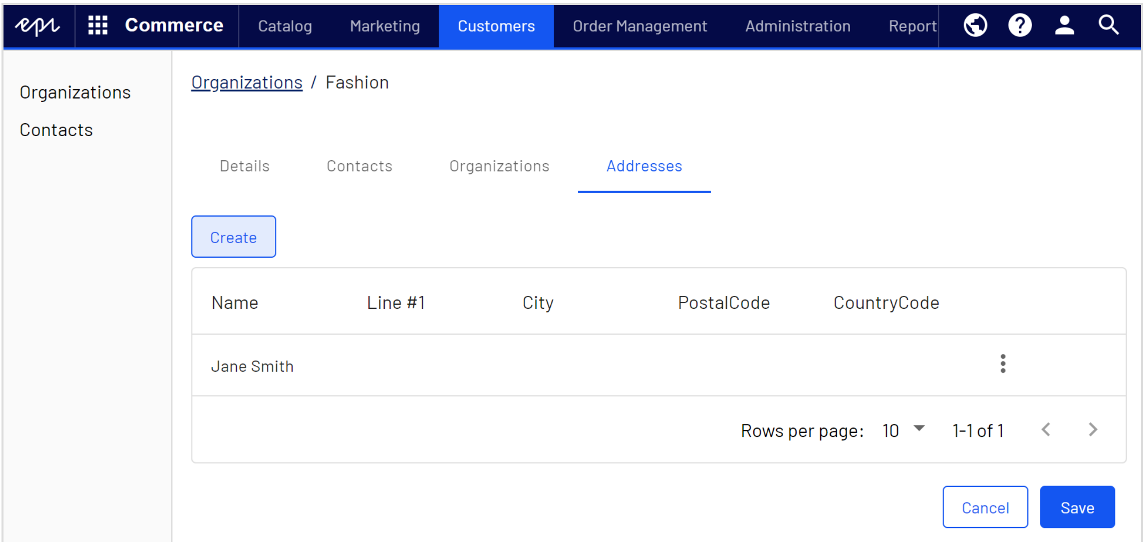
5. Add contacts for the organization on the **Contacts** tab. Click **Save** when done.



6. If applicable, click **Add** to create an organization hierarchy on the **Organizations** tab. Click **Save** when done.



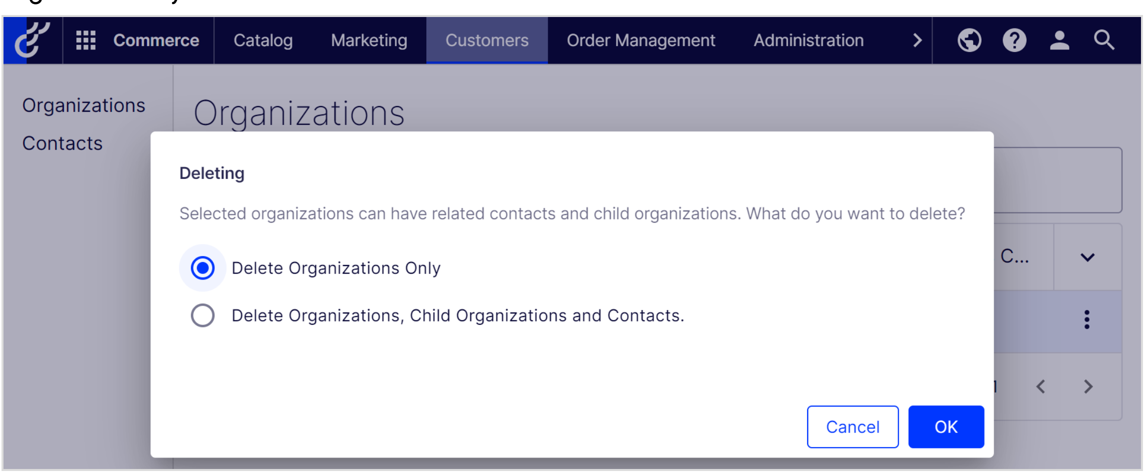
7. If applicable, enter address information for the organization on the **Addresses** tab. Click **Save** when done.



Deleting an organization

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, and you can reassign them to a parent later.

1. In the **Manage Organizations** overview, select **Delete** in the context menu for the organization you want to delete.



2. Select the appropriate scenario and click **OK** to confirm.

Contacts

> **Note:** Creating **system users** and assigning access rights (roles) to work with 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.

A contact with a related account is created automatically when a visitor registers on the public front-end site. With the account, customers can log in and view personalized information. You can manually create a contact from the **Customers** view in Optimizely Commerce.

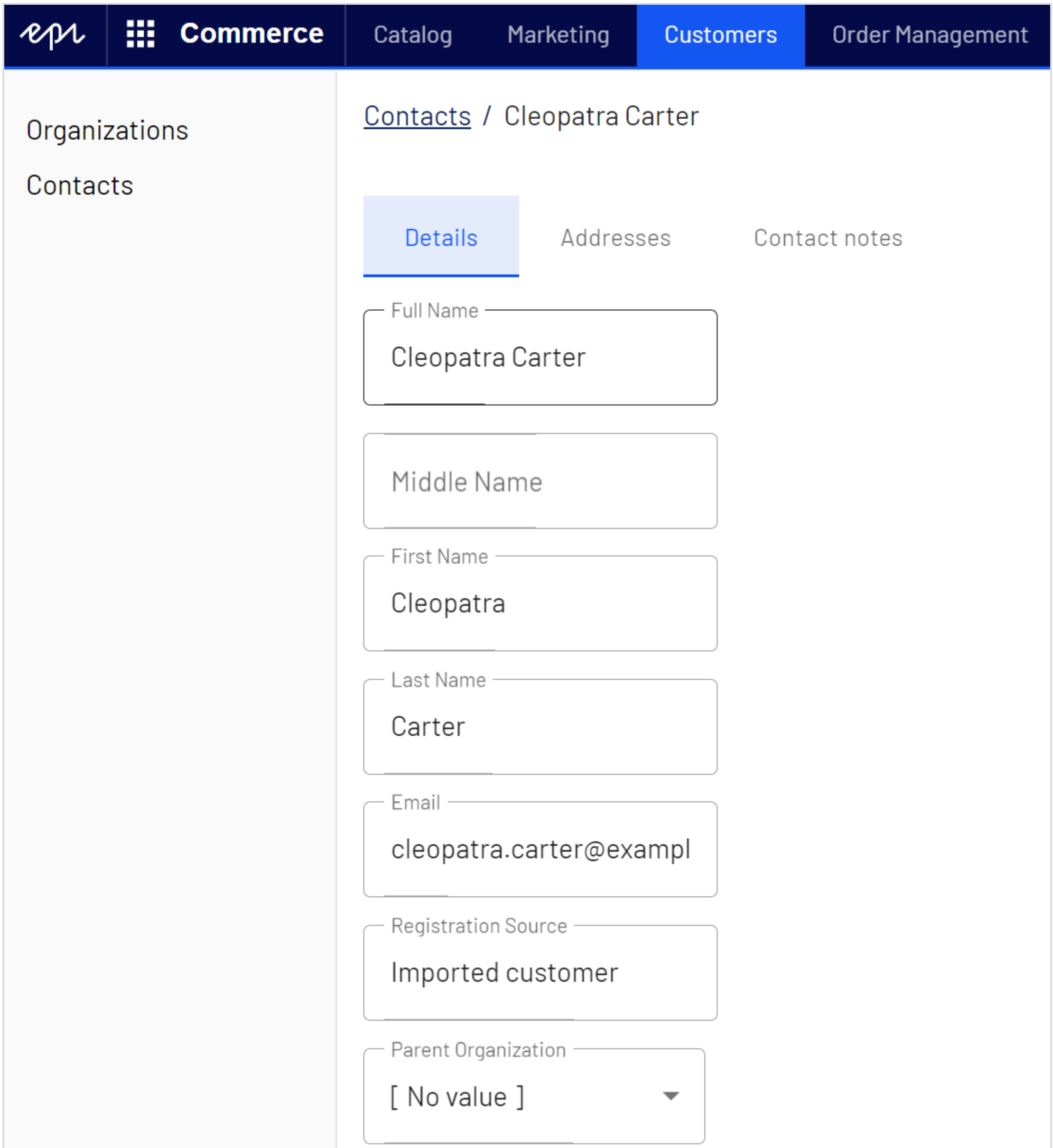
> **Note:** Currently it is **not** possible to manually create an account and associate it with a contact from the **Customers** view. This functionality will be available in a future version.

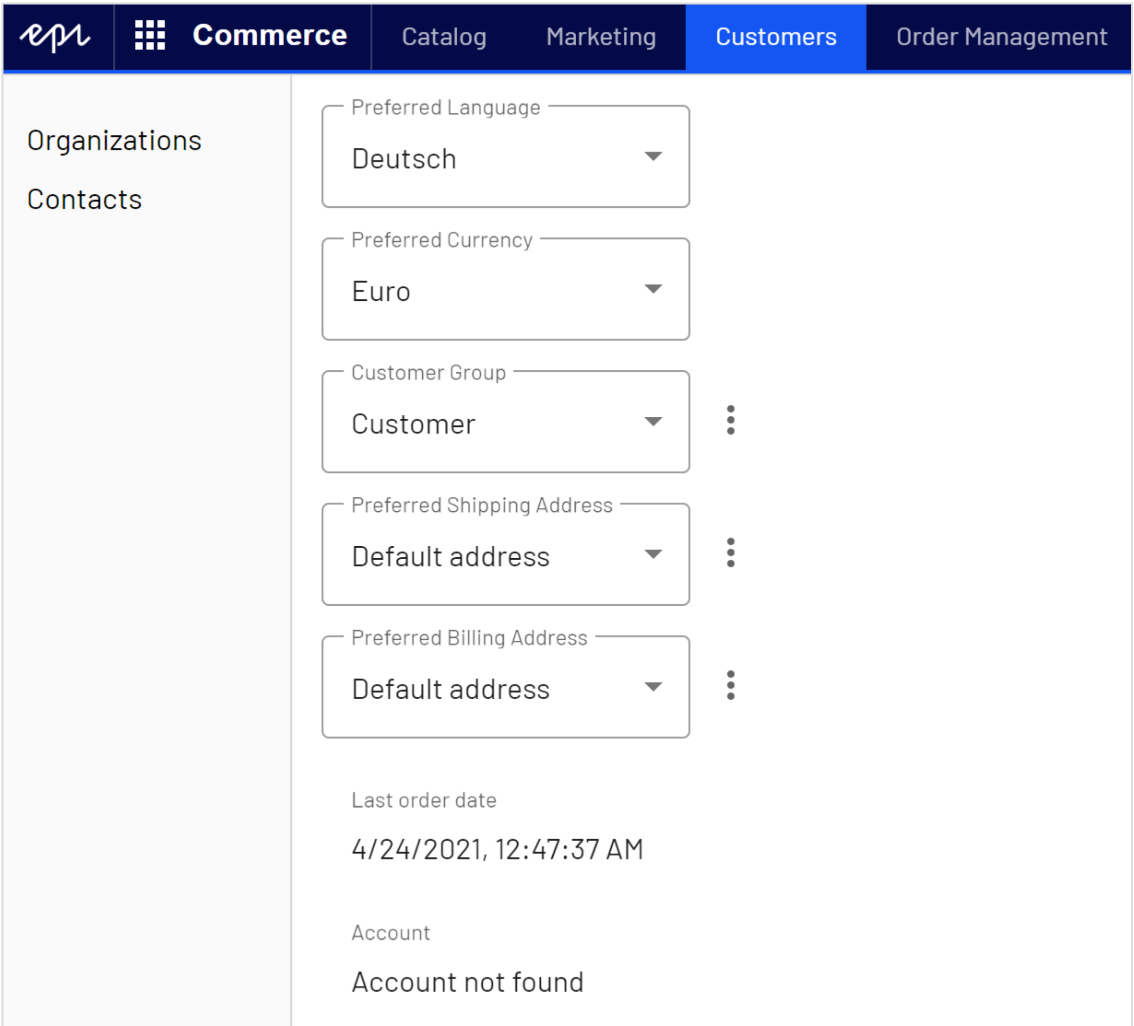
You can use customer groups and organizations to structure contacts for various purposes. For example, a customer group can be assigned to an organization which determines eligibility for prices that are different between customers. A contact in an organization is a member of that organization's customer group, even if the contact is assigned individually to a different customer group.

Creating and editing contacts

1. Open the **Customers** view, and click **Create** to add a new contact, or select **Edit** in the context menu to modify an existing one.

2. Enter data as described in the following for the **Details** tab, click **Save** when done.



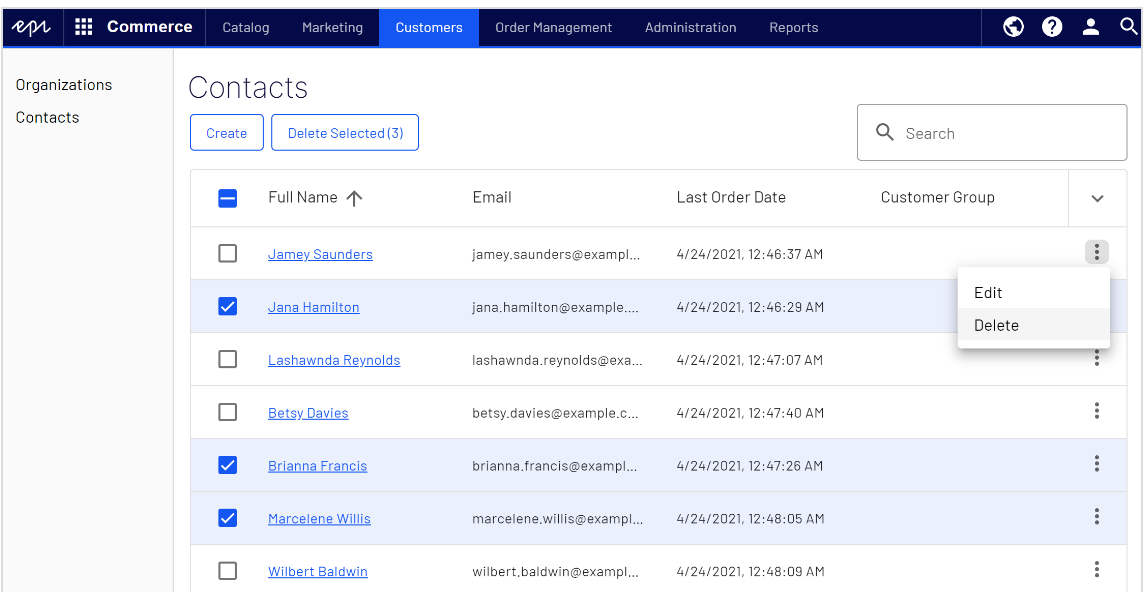


- **Full Name**. Required. Enter the contact's full name.
- **Middle Name**. Optional. Enter the contact middle name.
- **First Name**. Required. Enter the contact's first name.
- **Last Name**. Required. Enter the contact's last name.
- **Email**. Required. Enter the contact's email address.
- **Registration Source**. Optional. This field is automatically filled when a user creates a new account from the public website.
- **Parent Organization**. Optional. Select a parent organization to which the contact is assigned.

- **Preferred Language**. Optional. Select a language for the contact.
- **Preferred Currency**. Optional. Select a currency for the contact. For example, if the contact is in France, select the Euro currency.
- **Customer Group**. Optional. Select a customer group to which the contact is assigned.
- **Preferred Shipping Address**. Auto-filled, related to company accounts.
- **Preferred Billing Address**. Auto-filled, related to company accounts.

Deleting a contact

1. In the **Customers** view, select one or more contacts to delete.
2. Select **Delete** in the context menu, or **Delete Selected** to delete contacts.

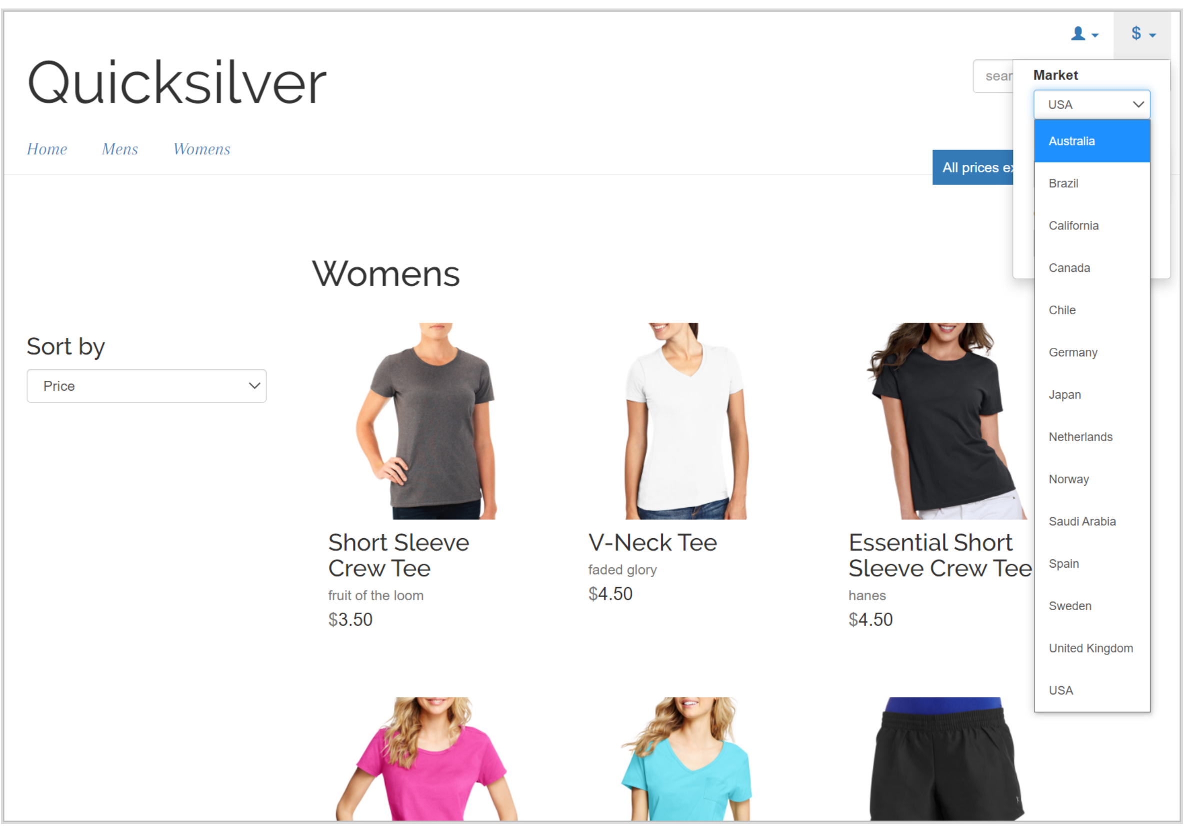


Markets

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 visitor select a market on the front-end. Others use different URLs for different markets, such as "yoursite.uk" and "yoursite.de". A site can also extract a visitor's geographic location from the IP address to determine the appropriate market.



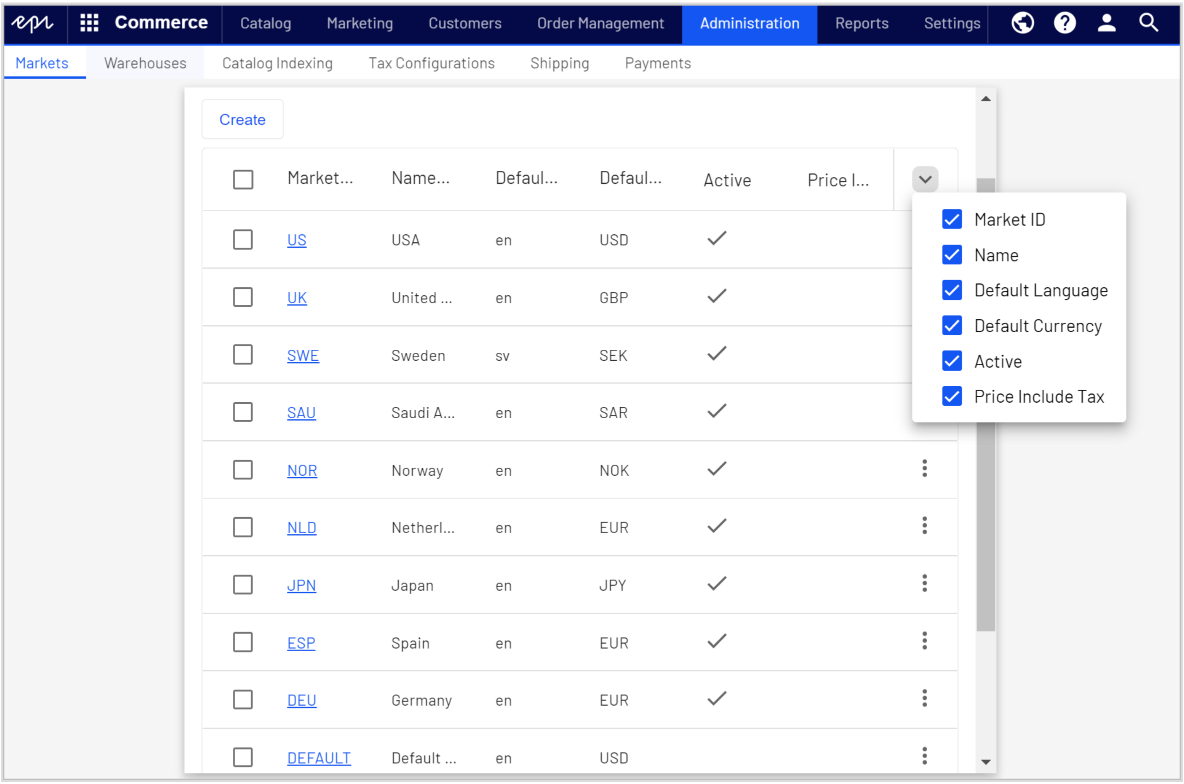
Working with markets

- When working in the Catalog View, you can filter results by market.
- When defining a variant's pricing information, you assign a market then its price in an appropriate currency.
- Order Management objects like purchase orders, shopping carts, and subscriptions can be filtered by market.
- By defining a market's language, content can automatically be displayed in that language when the market is selected on the front-end.

Browsing markets

The market overview under **Administration** displays existing markets with their languages, currencies and status, and whether the prices include tax.

Click a column header to sort the information on that property. You can also select which columns to display in the overview.

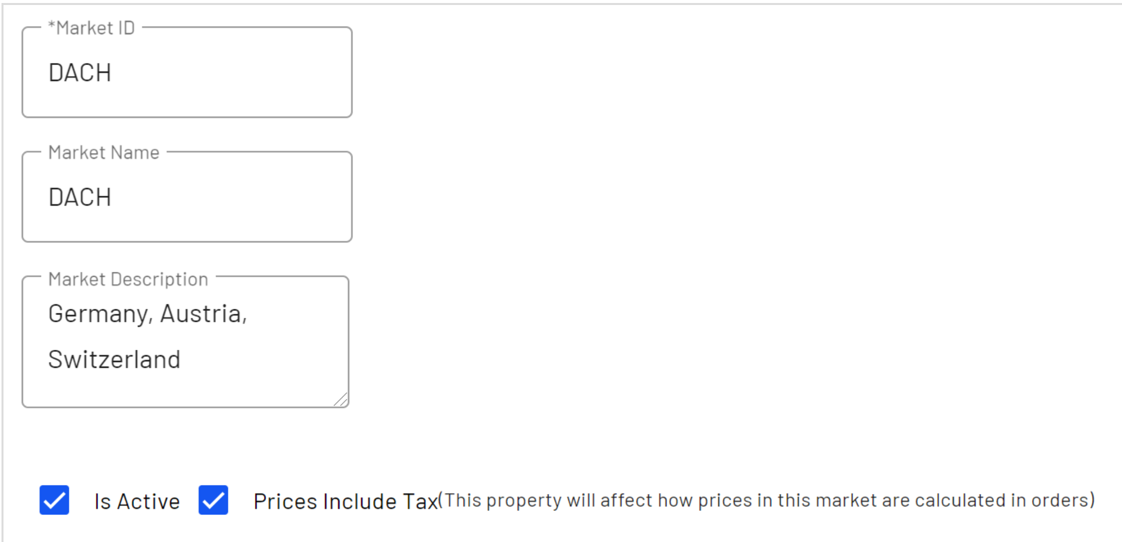


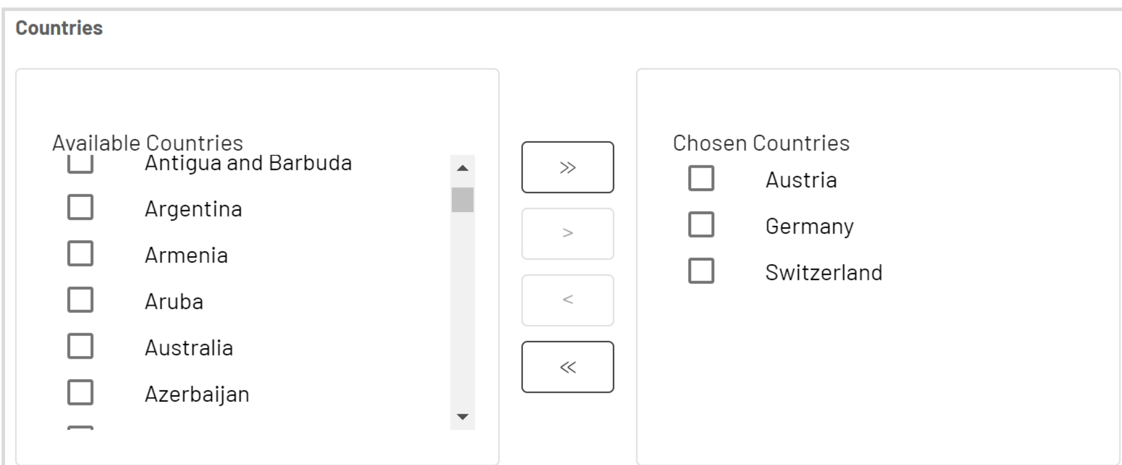
Note: The **Default Market** defines the language and currency used as a fallback for markets that are not specified.

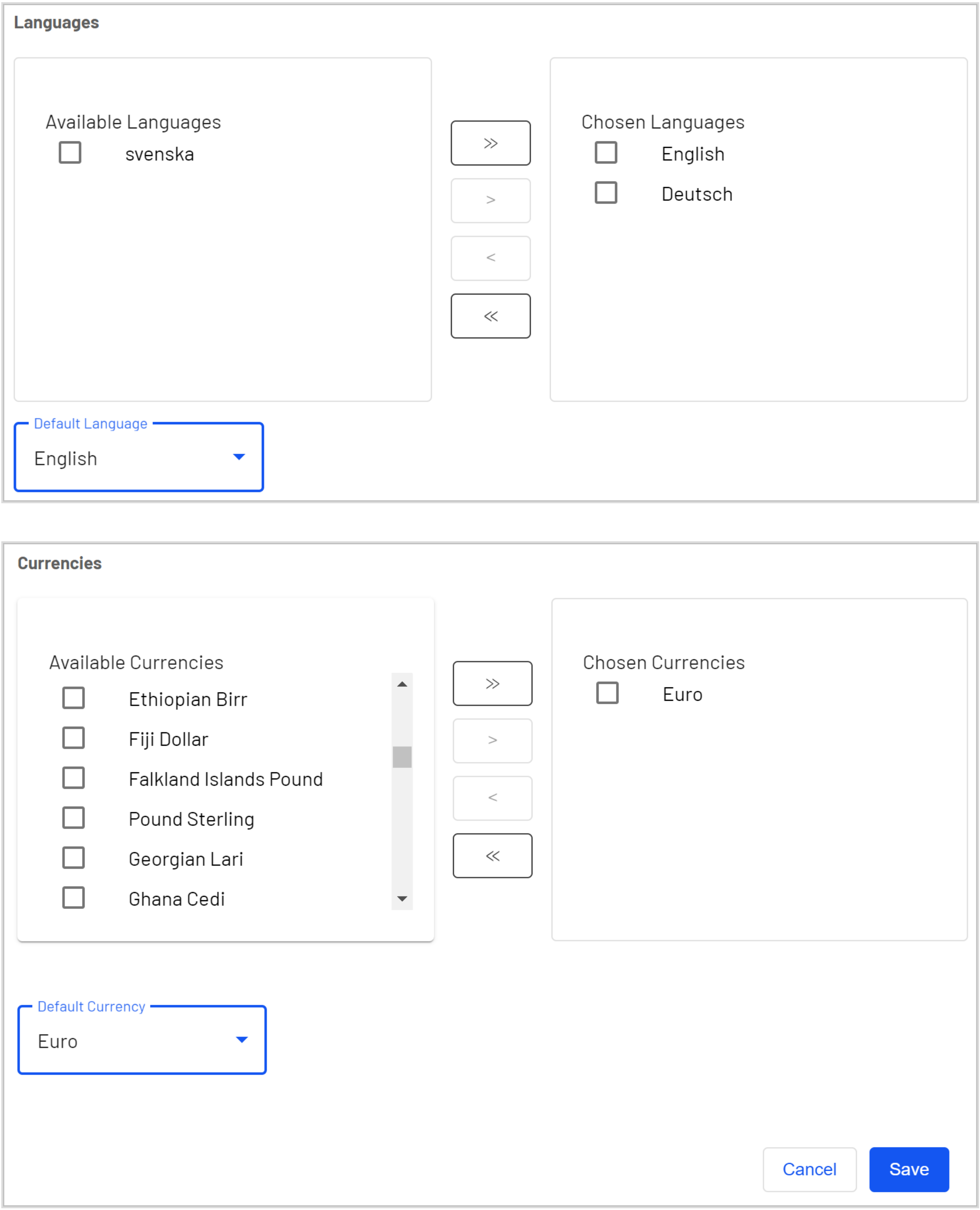
Creating or editing a market

1. In the **Administration** view, click **Markets**.
2. Click a market in the list to edit the settings, or click **Create**.

3. Fill in displayed fields as described in the following, and click **Save** when done.







- **Market ID**. The identifier for the market.
- **Market Name**. The name that appears in the markets list.

- **Market Description**. Explanation of the market (free-text).
- **Is Active**. Select to activate. Only active markets are available to visitors.
- **Prices Include Tax**. Select to indicate that returned prices include tax. This is typically used for markets where prices include tax, for example in the EU. The setting can be used to add checkout functionality displaying a tax-included price on the front-end.
- **Countries**. Desired countries to include in the market.
- **Languages**. Languages for the market. Note that languages need to be enabled on the site, to become available for selection here.
- **Default Language**. Default fallback language.
- **Currencies**. Desired currencies for the market.
- **Default Currency**. Default fallback currency.

Deleting a market

1. Select one or more markets from the list in the overview.
2. Click **Delete Selected**, and click **OK** to confirm.

Marketing system

> **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

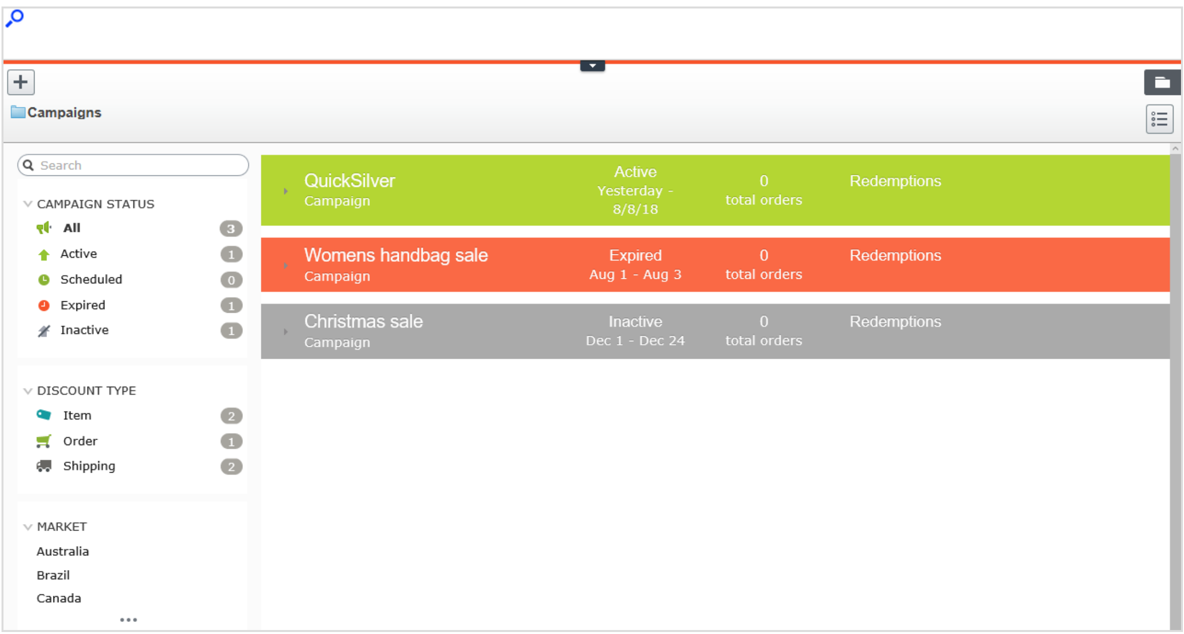
Campaigns and discounts

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

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

Campaign view

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



Understanding the Campaign View

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

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

- Inactive (gray). **Active** box is unchecked.

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

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

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

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

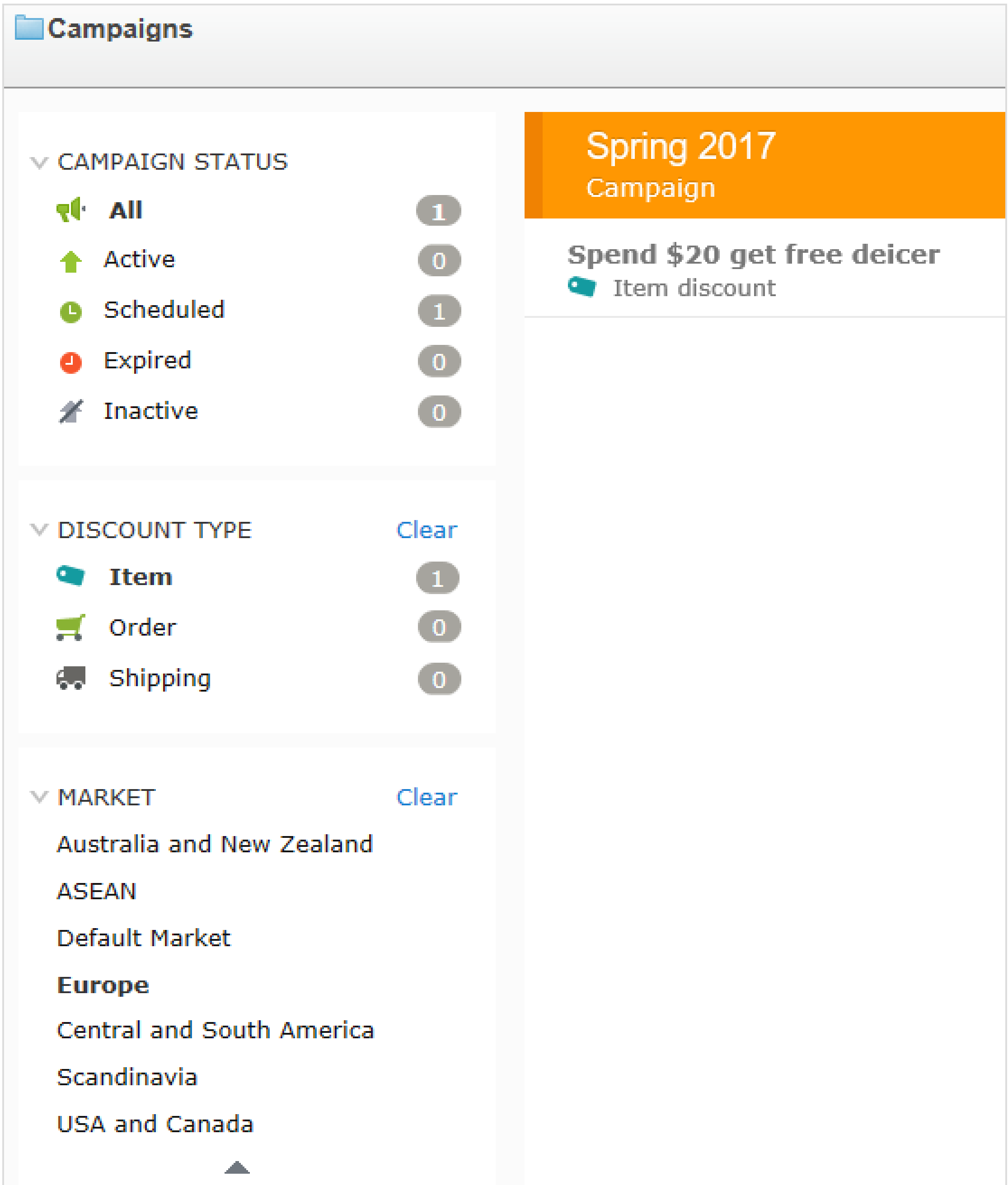
- For each *campaign*, you see the number of orders that include discounts. If an order has multiple discounts that belong to different campaigns, that order increases each campaign's total.
- For each *discount*, the Campaign view displays
  - the total number of orders that include it.
  - *redemptions*,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

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

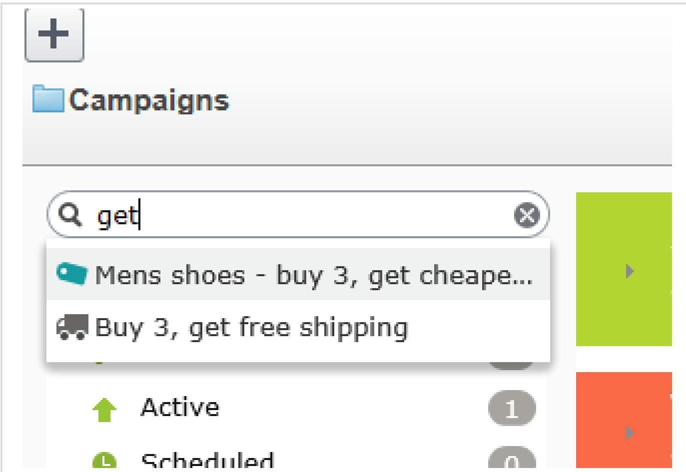
> **Note:** Canceled orders do not appear on Campaign View.

Campaign View facets and search

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



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



Search tips

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

Creating a campaign

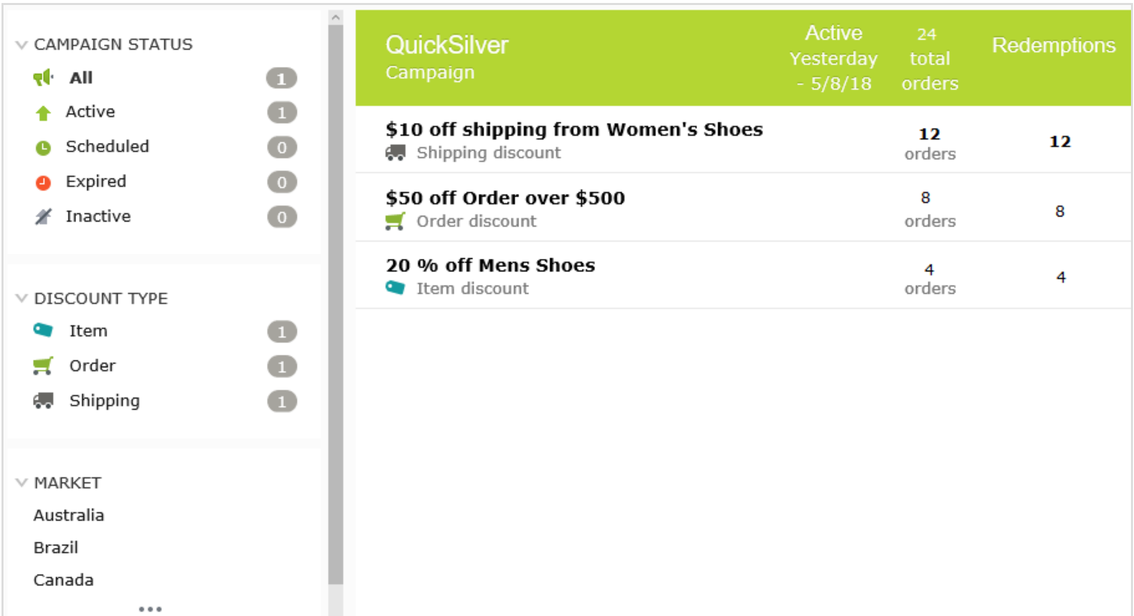
To create a campaign, identify the following:

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

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

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

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



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

Campaign fields

Field	Description
Name	The campaign name appears. Edit if desired. The name appears on the Campaign view and on dialogs that let users select campaigns.
Description	Enter a description of the campaign. It only appears on this view.
Scheduling and Status	
Available from	Select the date and time when the campaign is available. The campaign is active only if the shopping date/time is between the **Available from** and **Expires on** dates/times *and* the **Active** box is checked.

Field	Description
	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 time difference, for a customer in California, USA, the campaign expires at 2:00 PM.
Expires on	Select the date and time when the campaign is no longer available.
Active	Select the box to make the campaign active, or clear it to make it inactive. For a campaign to be active, the **Active** box must be selected *and* the shopping date/time must be between the **Available from** and **Expires on** dates/times. **Active check box examples** • When you set up a new campaign (including its discounts), keep **Active** cleared. When everything is correct, select **Active**, and the campaign goes live. • An active campaign is configured incorrectly. Clear **Active** to pause the campaign, correct it, then select **Active** to enable it.
Market and Revenue	
Target markets	Select one or more target markets. If you select no markets, the campaign is effectively inactive. **Effects of choosing markets** • If you choose one or more markets, only customers in those markets are eligible to receive this campaign's discounts. • If you create a discount for this campaign that involves an amount reduction, the list of currencies is determined by the active currencies for countries in the selected markets.

Field	Description
Revenue goal	Specify a revenue goal for the campaign. **Note:** Optimizely Commerce does not currently use this value—you must manually track campaign revenue.
Tracking Code	Use to enter a tracking code for campaign analytics. This field must be 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. By default, the code is not stored with the order after checkout. But you can get promotions from `IOrderForm.Promotions`, then get their campaigns and tracking codes.
Personalization	If you want to limit this campaign to certain visitor group, select them. If you do, only group members can use the campaign's discounts. See also: **Commerce-specific visitor group criteria**. **Note:** If more than two visitor groups are selected, hover over the ellipsis to see them all.
Discounts	See **Discounts**

Editing a campaign

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

Deleting a campaign

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

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

See also:**Discounts**

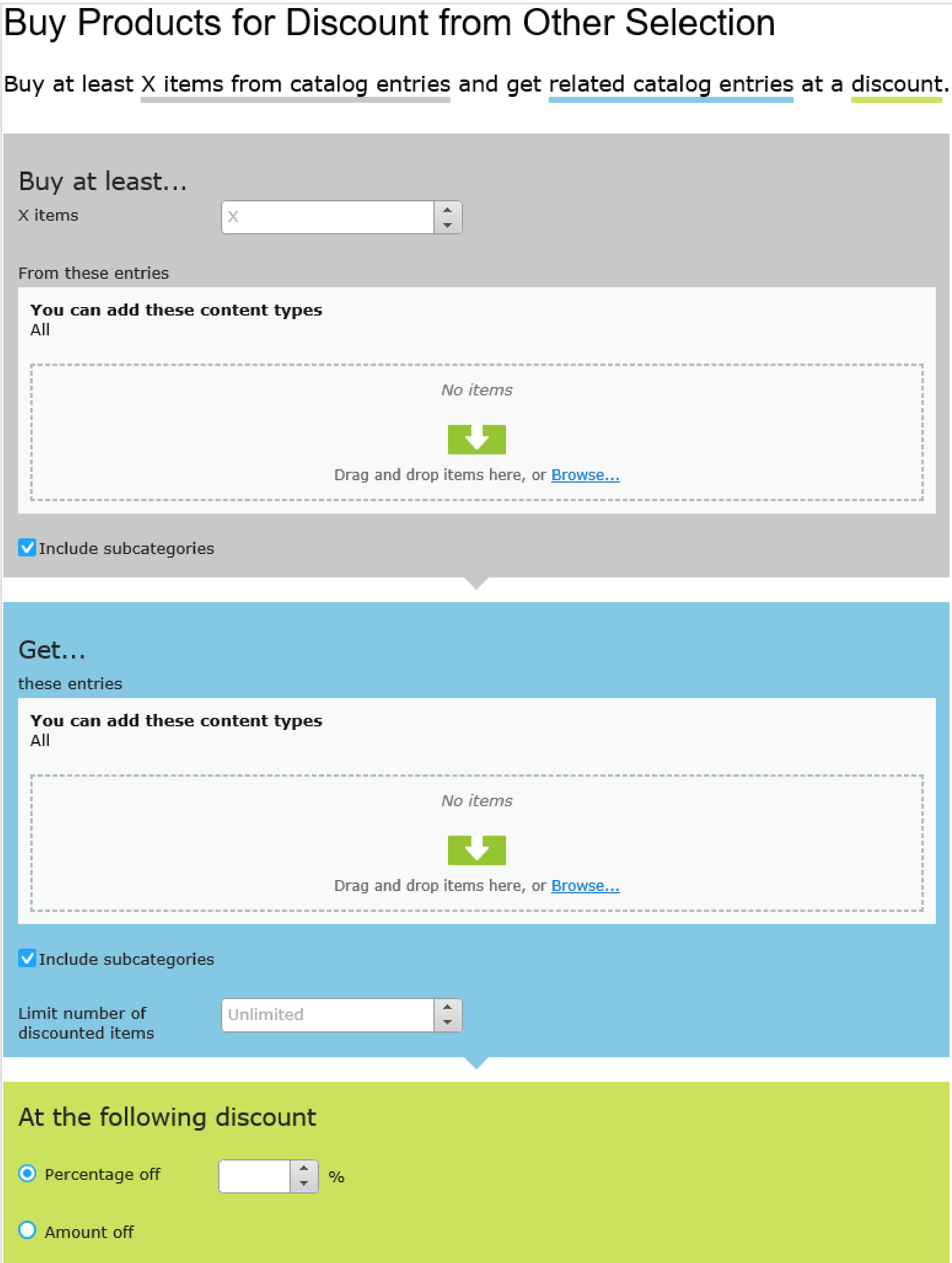
Discounts

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 customize to accommodate specific campaigns.

Discount colors

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

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


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

Creating a discount

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

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

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

Video: Demo of creating a campaign and discount

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

Field	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. The image can illustrate the discount on the web page. Your developer determines how to display the banner.
Scheduling and Status—By default, a discount's start and end dates match its campaign's dates. To change the discount's active dates, click **Different start and end dates, within the campaign dates** and complete the following fields.	
Available from	Select the date and time when the discount is available. The discount is active only if the shopping date/time is between the **Available from** and **Expires on** dates/times, and the **Active** box is selected. **Note:** The time refers to local time on the 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.
Expires on	Select the date and time when the discount is no longer available.
Active	For a discount to be active, the shopping date/time must be between the available and expiration dates/-

Field	Description
	times, *and* the active box must be selected. **Active check box examples** • While setting up a new discount, keep **Active** cleared. When everything is correct, select **Active**, and the discount is live. • An active discount is configured incorrectly. Clear **Active** to pause it, correct it, then select **Active** to enable the discount.
Promotion codes	If applicable, enter a promotion code for this discount. Promotion codes are also known as coupons. See also: **Using promotion codes**.
Discount Complete the information to define the discount. See **Example: Buy three items, get cheapest free** and **Built-in discounts**.	
This discount does not apply to these catalog items	Use this area to exclude catalogs, categories, or catalog entries from a specific discount. See **Exclude catalog items from a discount**.
Redemption limits	If applicable, enter one or more *redemption limits* for this discount; that is, the maximum number of times a discount can be redeemed. See also: **Applying redemption limits**.

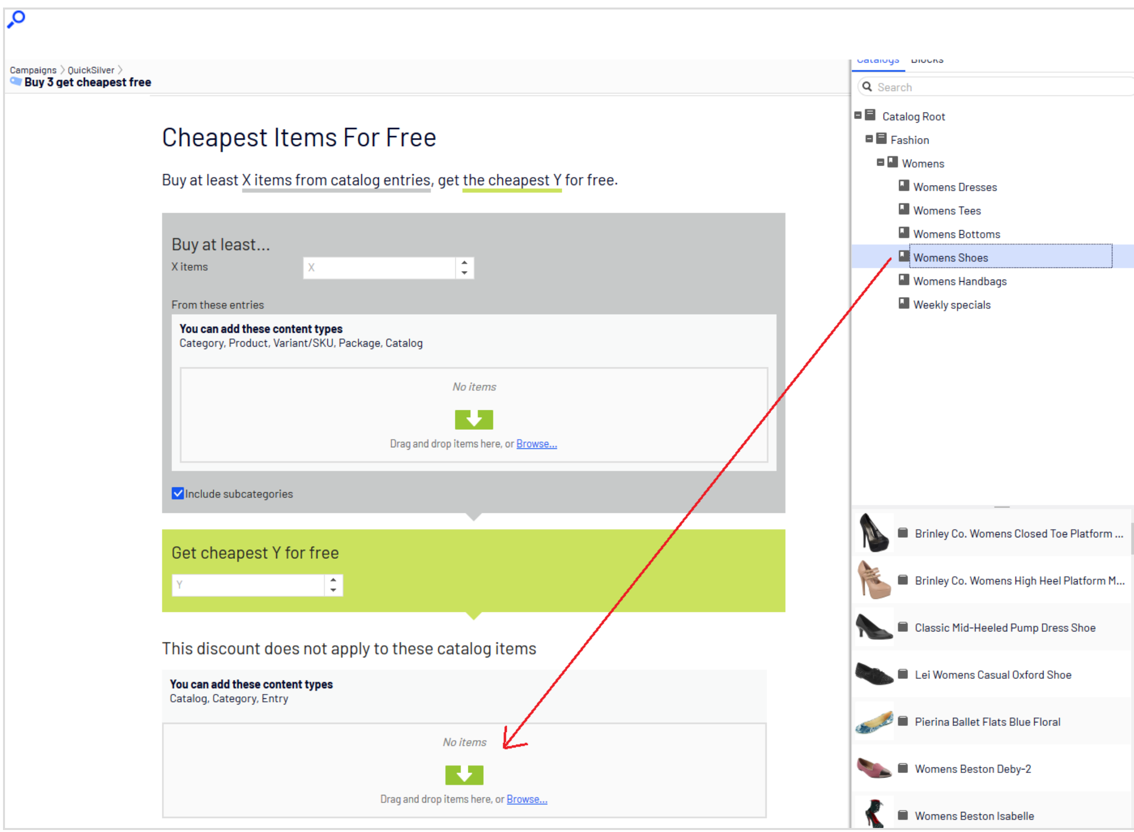
Example: Buy three items, get cheapest free

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

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

1. From the Campaigns view's top left corner, select **Add** > **Discount**.
2. Select the campaign to which the discount will belong.

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



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

Selecting discount-eligible items

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

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

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

- One or more categories. Its products are eligible. Use the **Include subcategories** box to determine if products in selected categories' subcategories also are eligible. By default, the box is selected.
- Individual products, SKU, or package.
- Some discounts let you select a catalog. If you can, **Catalog** appears on the view.

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

Copying a discount

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

Impact of copying on a discount's field values

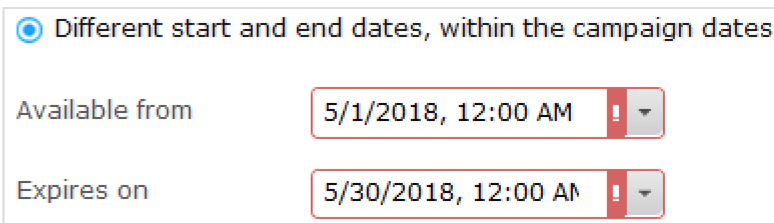
When you copy a discount, all field values from the original discount are copied to the new one with the possible exception of these.

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

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

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

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

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

Copy procedure

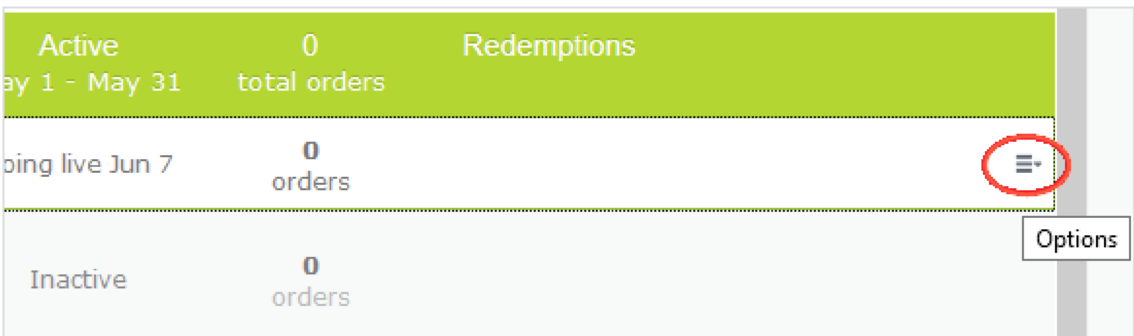
1. From Marketing view, identify the campaign that contains the discount that you want to copy.
2. Expand the campaign to see its discounts.
3. From the discount's context menu, choose **Copy** or **Cut**.
4. Move to the campaign to which you want to copy the discount.
5. Select **Paste** from the campaign's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

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

Editing a discount

Follow these steps to edit a discount.

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



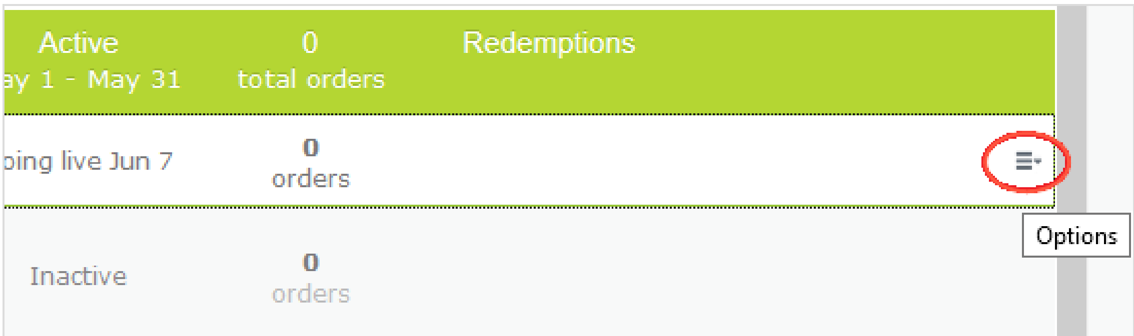
4. Click the icon then **Edit**. To learn about the fields, see **Discount fields**.
5. Edit the desired information then click **Save**.

Deleting a discount

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

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

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



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

How 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 customers buy 5 shirts, they get a discount on two. Or, the **limit number of discounted items** drop-down restricts how many items get discounted. To determine *which* items are discounted, 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

Item	Quantity	Cost per item	Item total
			Total cost = $75.00

After discount

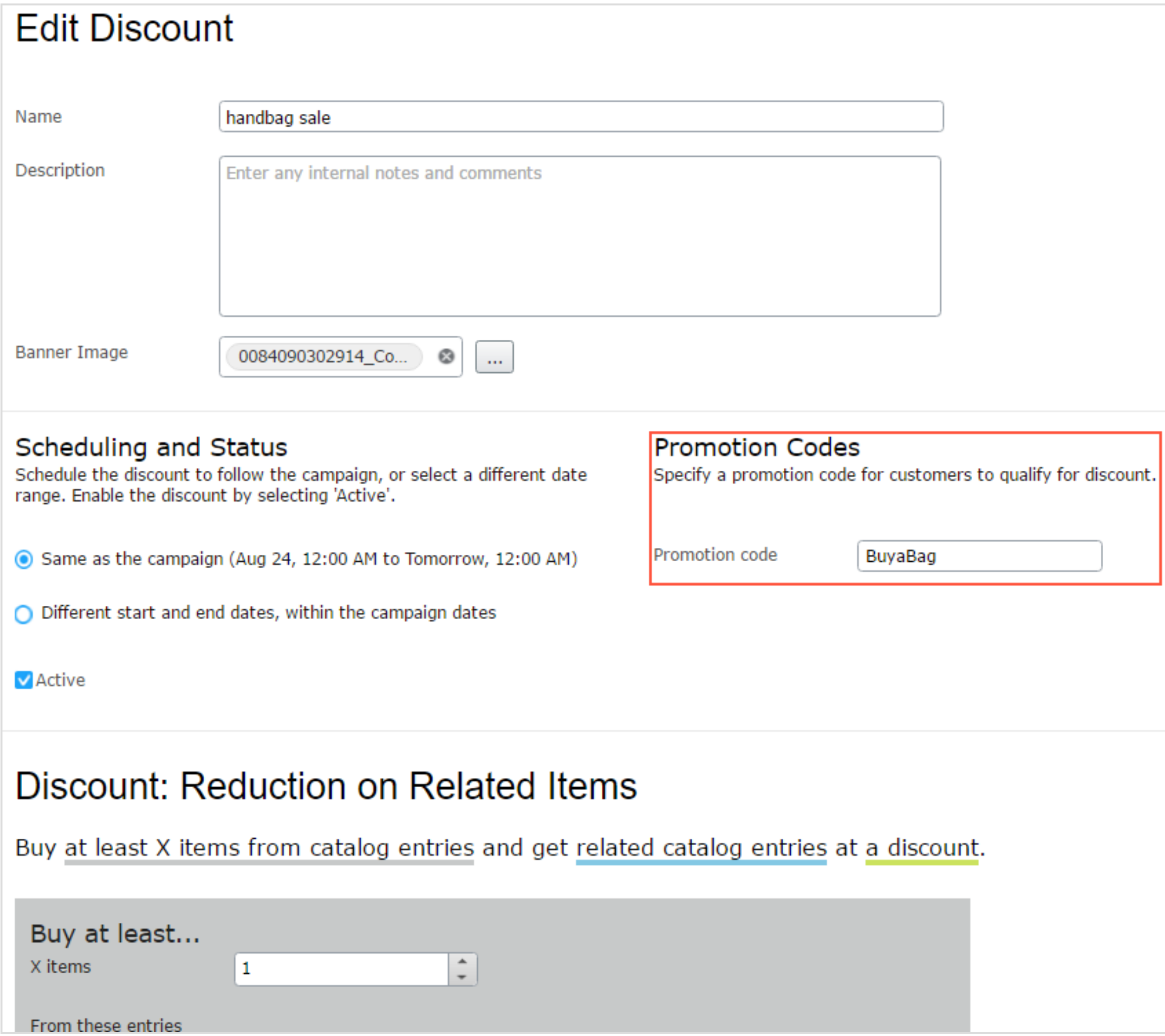
To maximize customer savings, the discount is first applied to the two most expensive items, the yellow shirts. Next, it is applied to one of the next most expensive items, a blue shirt. Since only three items are discounted, the second blue shirt is full price.

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

Using promotion codes

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

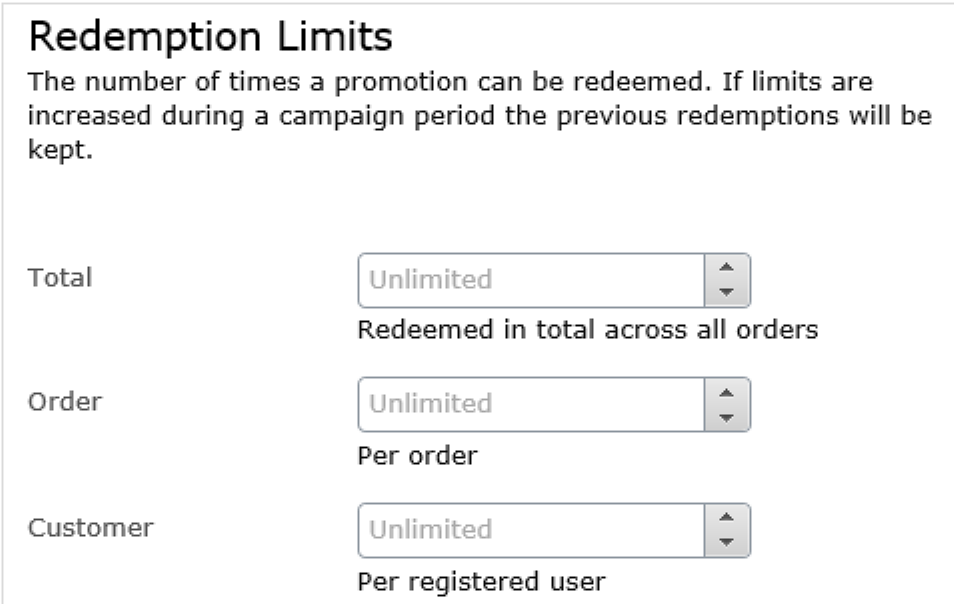
To apply a promotion code to a discount, create the discount as you normally do. Then, in the discount view's **Promotion codes** field, enter a unique promotion code.



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

Applying redemption limits

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



There are three types of redemption limits.

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

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

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

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

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

Combining redemption limits

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

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

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

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

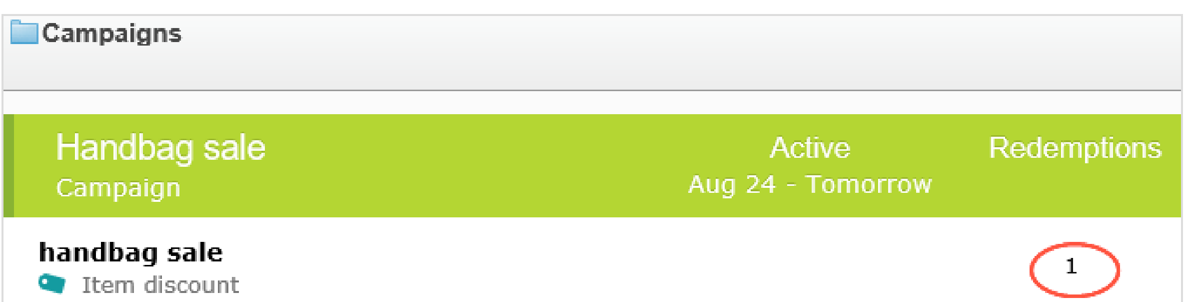
Here is another example.

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

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

Viewing the number of redeemed discounts

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



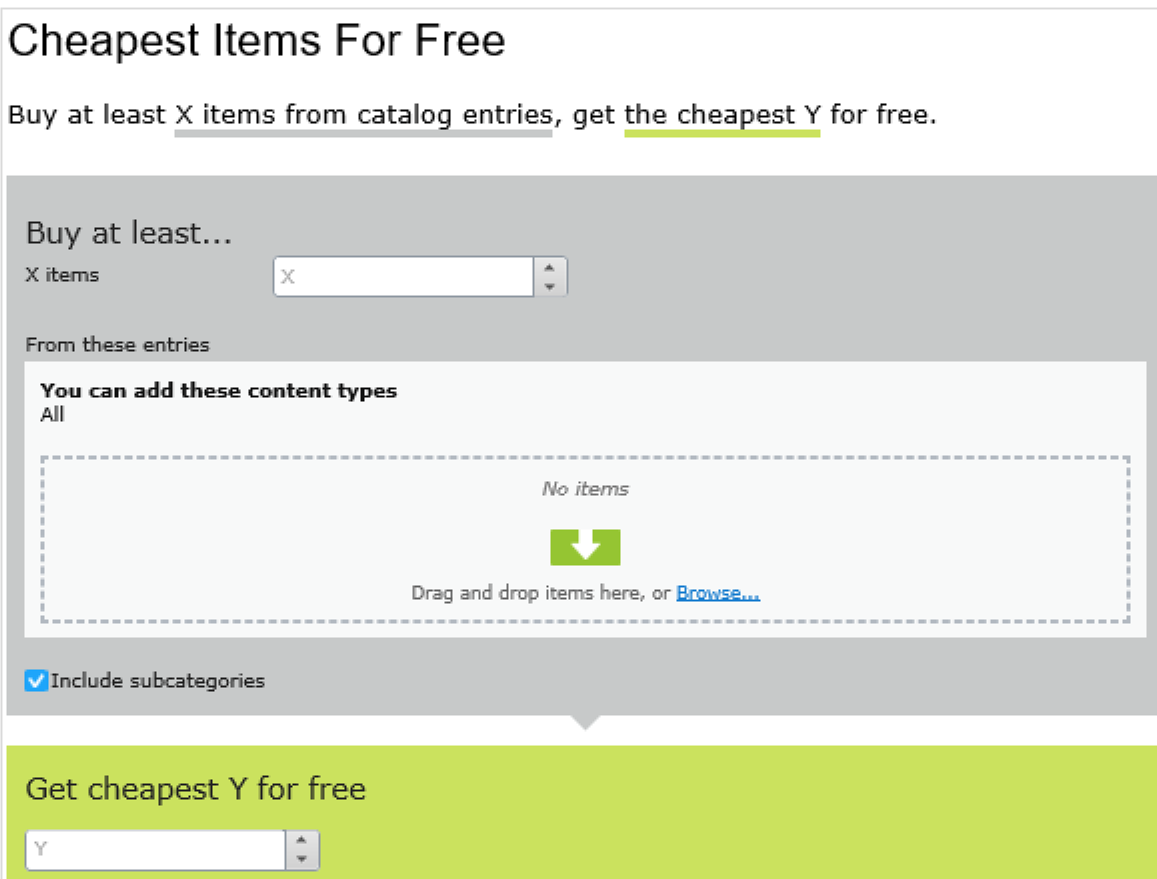
Built-in discounts

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.



Example

Buy at least 10 eligible products, get the cheapest 3 for free. Assumes no redemption limits.

Sample order before discount

Product	Quantity	Cost per product	Line total
White shirt	5	$5.00	$25.00
Blue shirt	3	$10.00	$30.00
Yellow shirt	3	$15.00	$45.00
			Total cost of order = $100.00

After discount

Product	Quantity	Cost per product	Line total
White shirt	5	$5.00	$10.00; 3 of 5 shirts are free
Blue shirt	3	$10.00	$30.00
Yellow shirt	3	$15.00	$45.00
			Total cost of order = $85.00

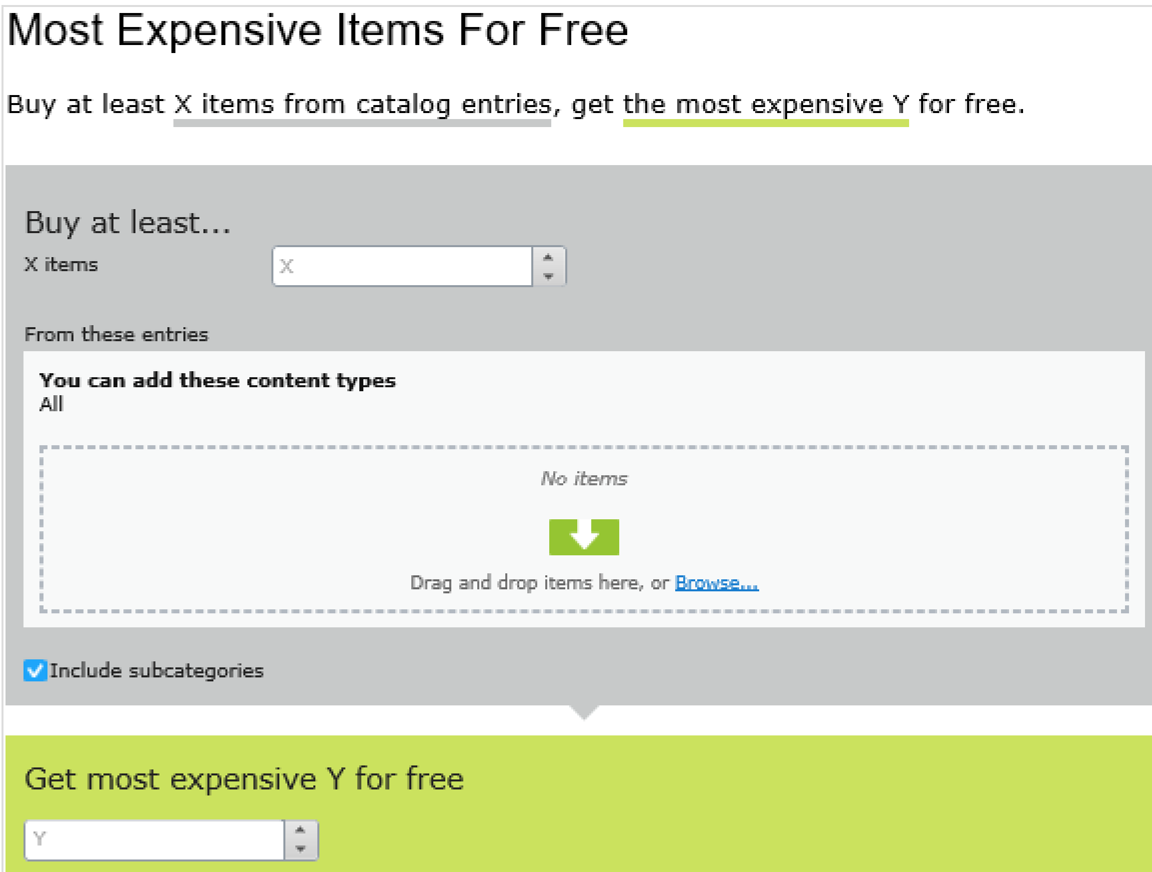
The view has two sections:

- **Buy at least X items...**. Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Get the cheapest Y for free**. Enter the number of items to which no charge will be applied at checkout. Only this number of the cheapest items will be free.

This discount supports multiples. That is, if a promotion is "buy at least 5 eligible items, and get the most expensive 1 item for free", and a customer buys 10 items, they get 2 free items. You can limit this factor by applying redemption limits.

Most expensive items for free

Buy at least **X** eligible items, and get the most expensive **Y** items for free. For example, if an order includes 5 hardcover books, the most expensive one is free.



The view has two sections:

- **Buy at least X items...**. Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Get most expensive Y for free**. Enter the number of items to which no charge will be applied at checkout. Only this number of the most expensive items will be free.

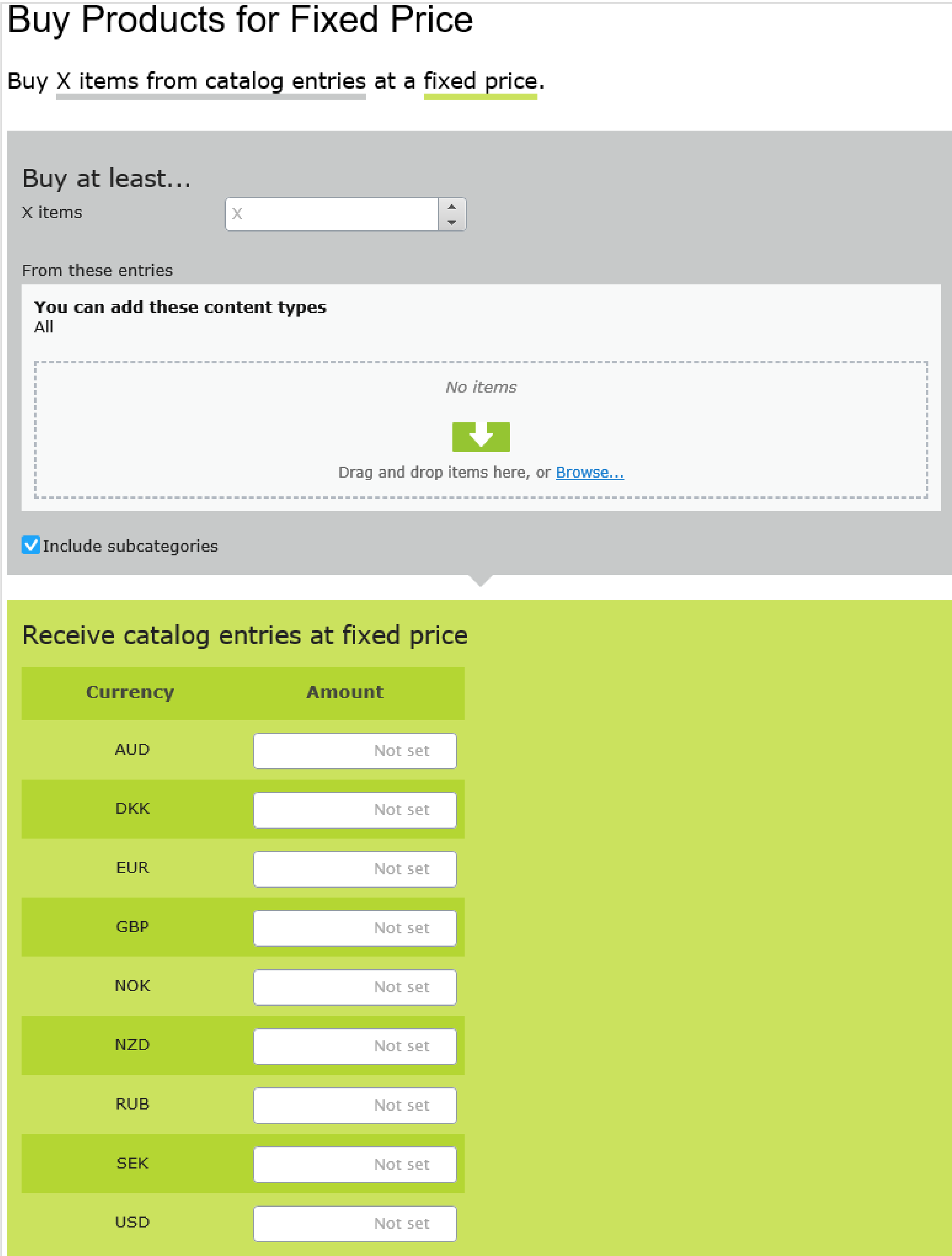
This discount supports multiples. That is, if a promotion is "buy at least 5 eligible items, and get the most expensive 1 item for free", and a customer buys 10 items, they get 2 free items. You can limit this factor by applying redemption limits.

Buy products for fixed price

Buy a fixed number of items from selected categories for a set price. For example, buy 3 men's shirts for £50.

The discount is applied only if the fixed price is less than the items' cost. For example, you create a fixed price discount: **Buy 2 from Top-Tunics for $250**.

- Buyer A selects two Top-Tunics items: $150 each, $300 total. In this case, the discount *is* applied, because the fixed price ($250) is less than the $300 total.
- Buyer B selects two Top-Tunics items: $100 each, $200 total. In this case, the discount is *not* applied, because the fixed price ($250) exceeds the $200 total.


Buy Products for Fixed Price
Buy X items from catalog entries at a fixed price.
Buy at least...
X items
X
From these entries
You can add these content types
All
No items
Drag and drop items here, or Browse...
Include subcategories
Receive catalog entries at fixed price
Currency
Amount
AUD
Not set
DKK
Not set
EUR
Not set
GBP
Not set
NOK
Not set
NZD
Not set
RUB
Not set
SEK
Not set
USD
Not set

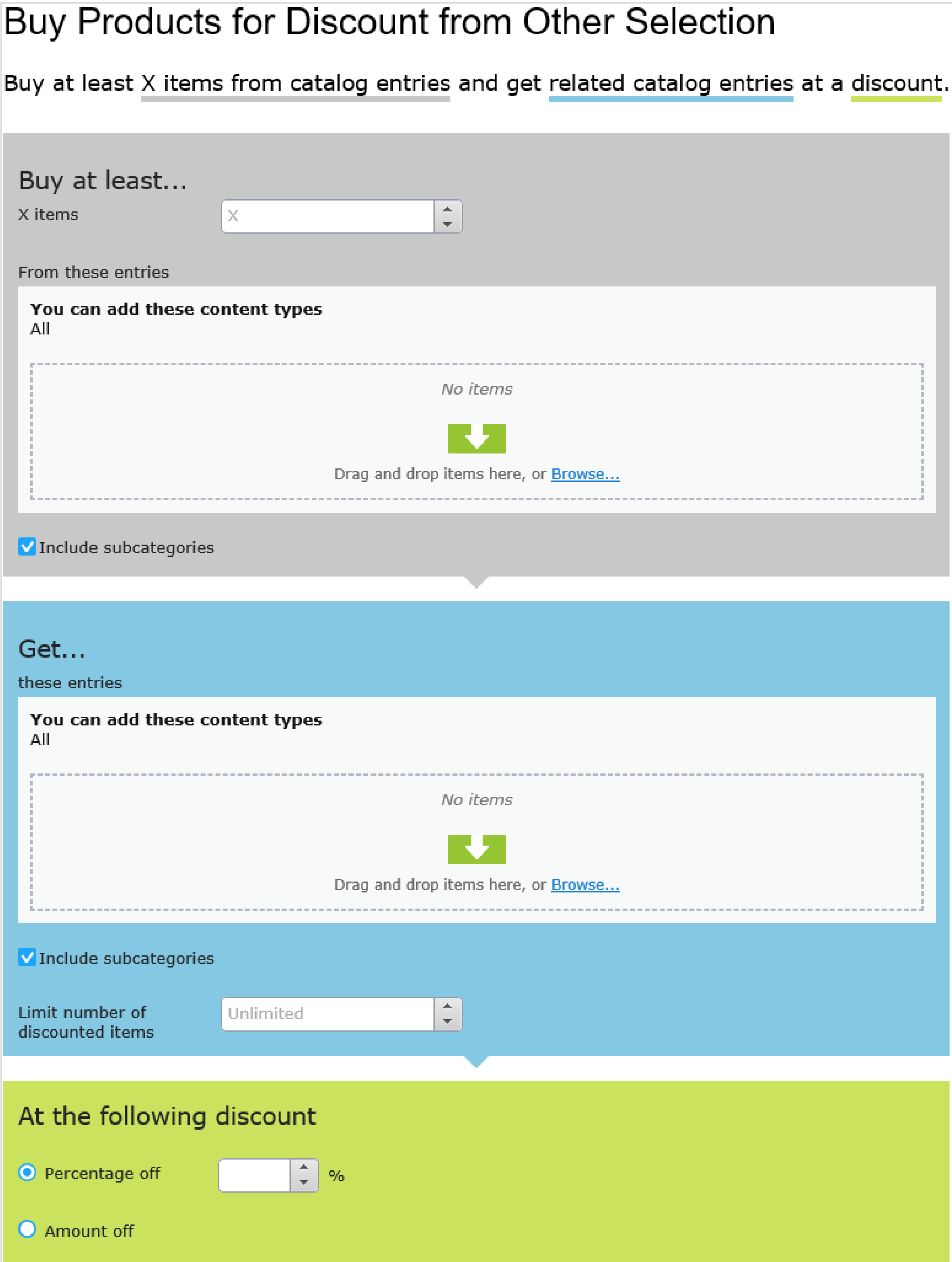
The view has two sections:

- **Buy at least X items…**. Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Receive catalog entries at fixed price**. For the above items, enter a fixed price for each currency. If no amount is entered for a currency, no discount is available for it.

> **Note:** The list of currencies is determined by the campaign's target market.

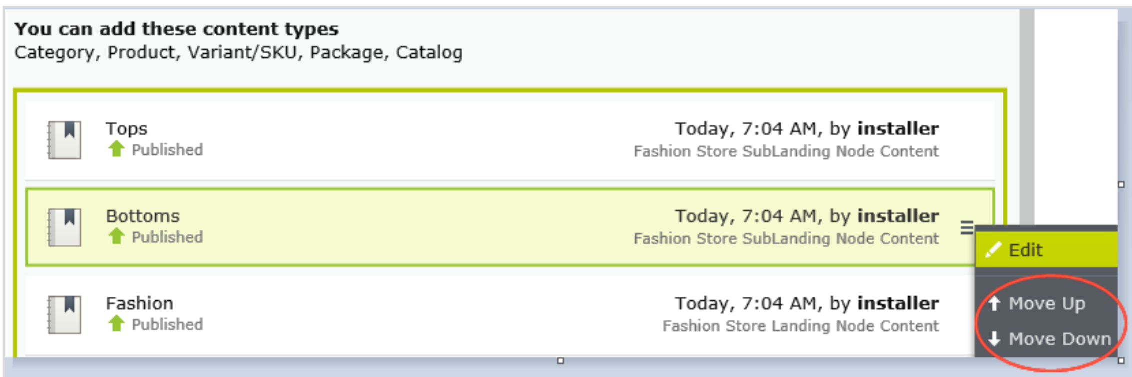
Buy products for discount from other selection

Buy a minimum amount from a group of items to get a discount on a second group of items. For example, customers who purchase a winter coat get a 30% discount on scarves, gloves, and hats. There is no relationship between the first set of items and the second.


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

The view has three sections:

- **Buy at least X items...**. Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Get... these entries**. Select items to be discounted. This area has a context-sensitive menu that includes **Move up** and **Move Down** options for each item. A product's position has no effect on how discounts are processed.

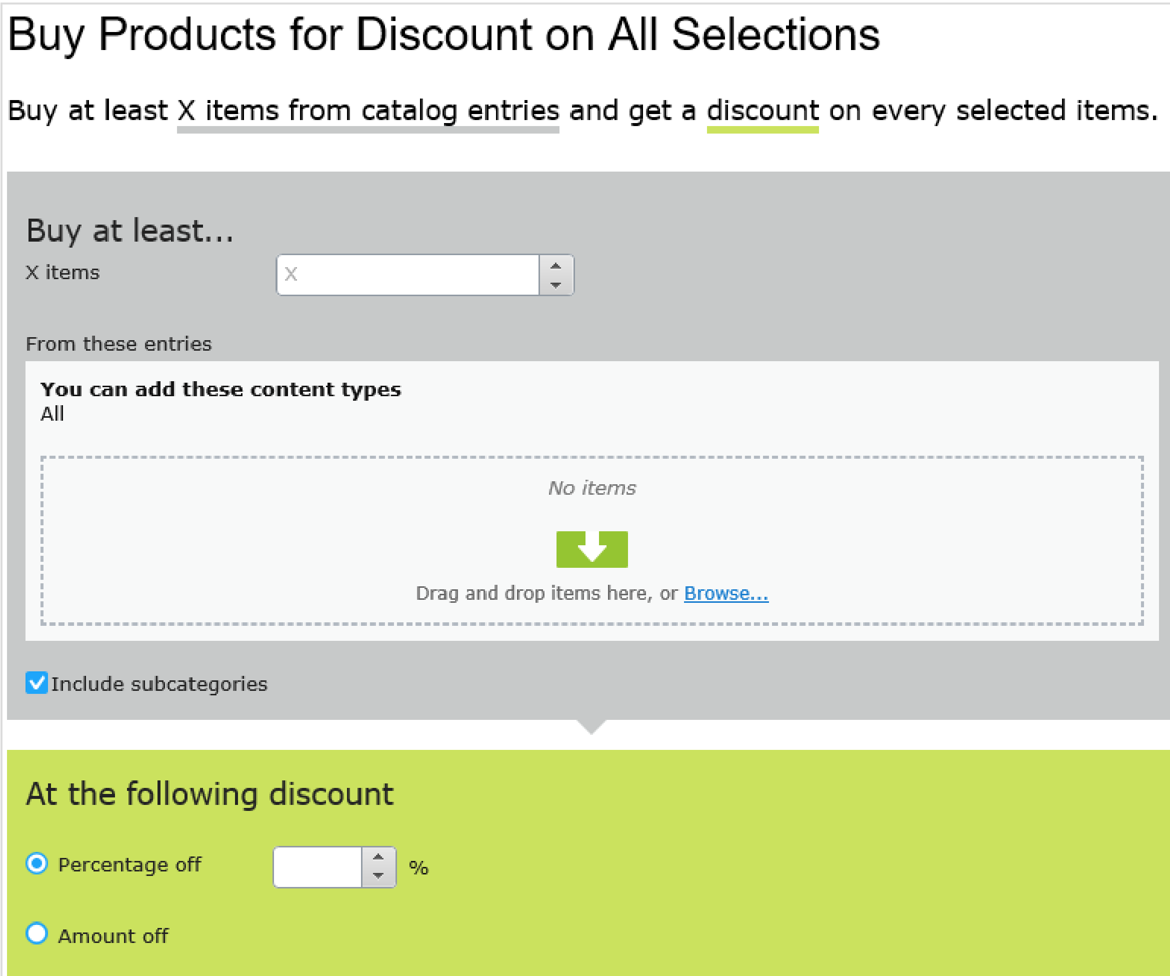


- **At the following discount**. Choose how to calculate the discount.
  - **Percentage off**. Enter the discount as a percentage of the items' cost.
  - **Amount off**. Enter a discount amount for each eligible currency. The discount is only available for currencies with amounts.

> **Note:** The list of currencies is determined by the campaign's target market.

Buy products for discount on all selections

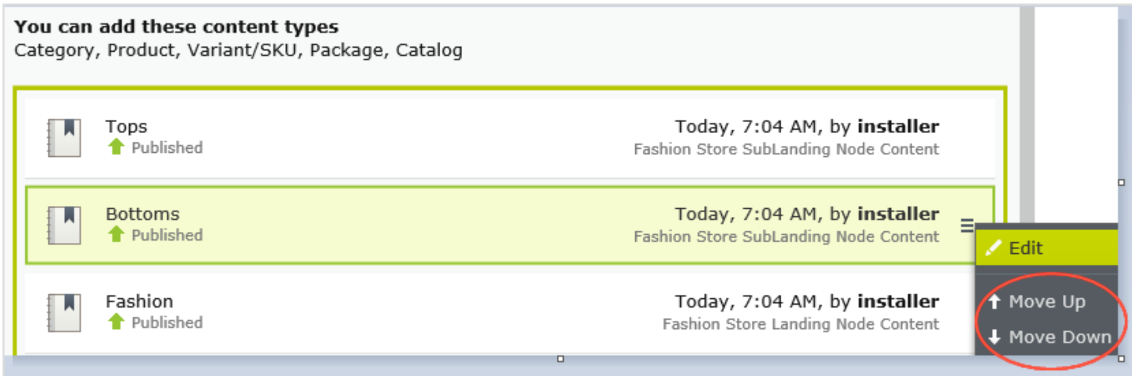
Buy a minimum number of selected items and get a discount on all items. For example, purchase 2 or more long-sleeved shirts and get a 15% discount on all long-sleeved shirts. The discount can be an amount or a percentage.



The view has these sections:

- **Buy at least X items...**. Enter the minimum number of items then the categories, products, and so on from which customers must pick. See also: **Selecting discount-eligible items**.

  This area has a context-sensitive menu with **Move up** and **Move Down** options for each item. A product's position has no effect on how discounts are processed.



- **At the following discount**. Choose how to calculate the discount.
  - **Percentage off**. Enter the discount as a percentage of the items' cost.
  - **Amount off**. Enter a discount amount for each eligible currency. The discount is only available for currencies with amounts.

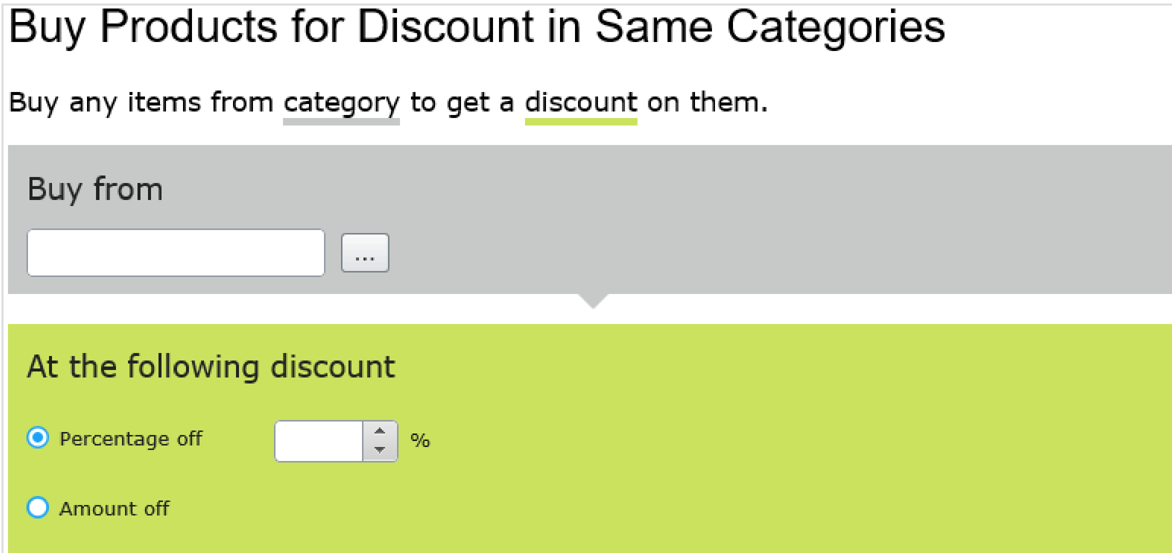
> **Note:** The list of currencies is determined by the campaign's target market.

Buy products for discount in same categories

When creating this discount, you select a category then a discount amount or percentage. The discount applies to all items in that category and its subcategories.

When calculating redemption limits, this discount counts each eligible item as 1. For example, if the order redemption limit is 5, and a shopper purchases 10 items in the selected category or subcategories, the discount only applies to 5 items. This is different from the way that 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.



The view has these sections.

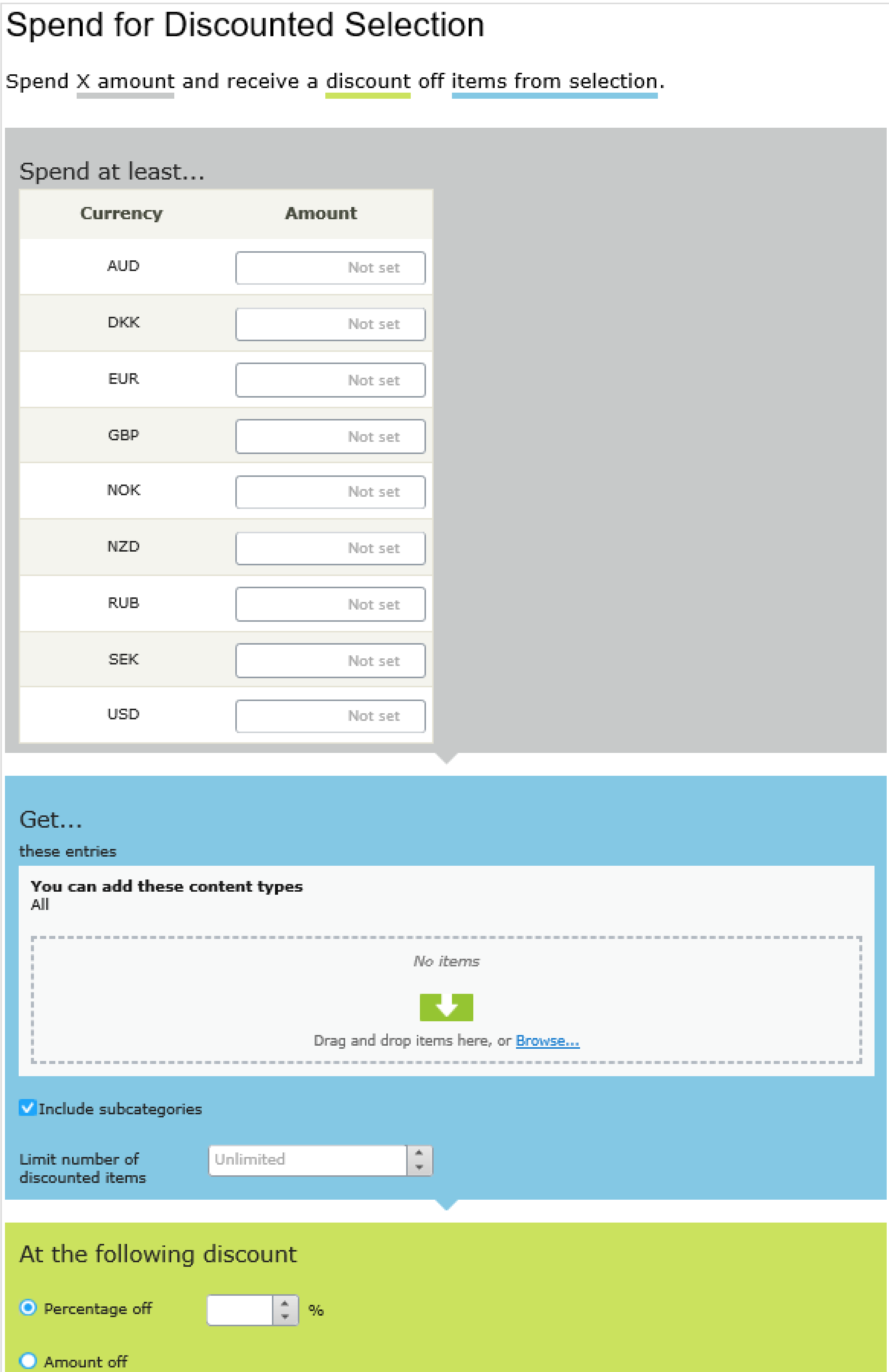
- **Buy from**. Select a category. All items in it and its subcategories are eligible for the discount.
- **At the following discount**. Choose how to calculate the discount.
  - **Percentage off**. Enter the discount as a percentage of the items' cost.
  - **Amount off**. Enter a discount amount for each eligible currency. The discount is only available for currencies with amounts.

> **Note:** The list of currencies is determined by the campaign's target market.

Spend for discounted selection

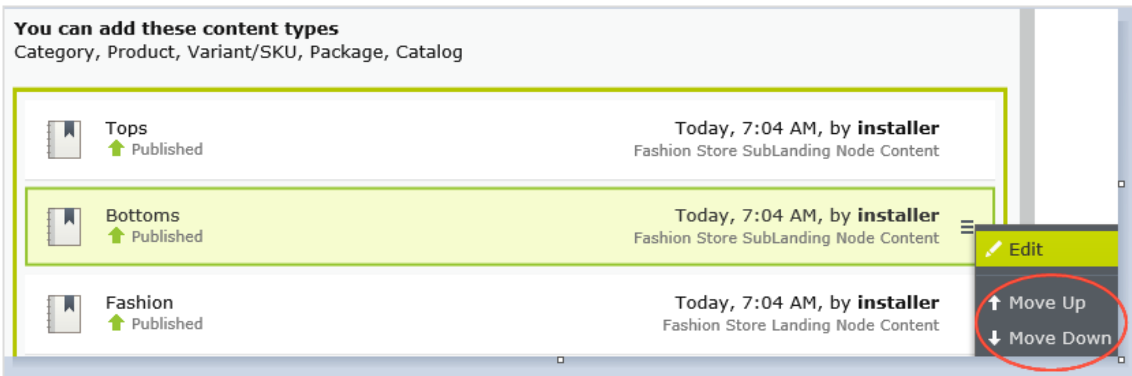
Spend a minimum amount to get a discount on selected items. For example, spend at least €100 and get 10% off all belts. The discount can be an amount or a percentage.

The second group of items is independent of the first group. You have total flexibility in determining both groups.


Spend for Discounted Selection
Spend X amount and receive a discount off items from selection.
Spend at least...
Currency
Amount
AUD
Not set
DKK
Not set
EUR
Not set
GBP
Not set
NOK
Not set
NZD
Not set
RUB
Not set
SEK
Not set
USD
Not set
Get...
these entries
You can add these content types
All
No items
Drag and drop items here, or Browse...
Include subcategories
Limit number of discounted items
Unlimited
At the following discount
Percentage off
%
Amount off

The view has three sections:

- **Spend at least...**. Enter a minimum order amount needed to qualify for the shipping discount. This section displays all currencies for the campaign's target market. Enter a minimum qualifying amount for each eligible currency. If no amount is entered, the discount is not available in that currency.
- **Get... these entries**. Select items to be discounted. This area has a context-sensitive menu that includes **Move up** and **Move Down** options for each item. A product's position has no effect on how discounts are processed.

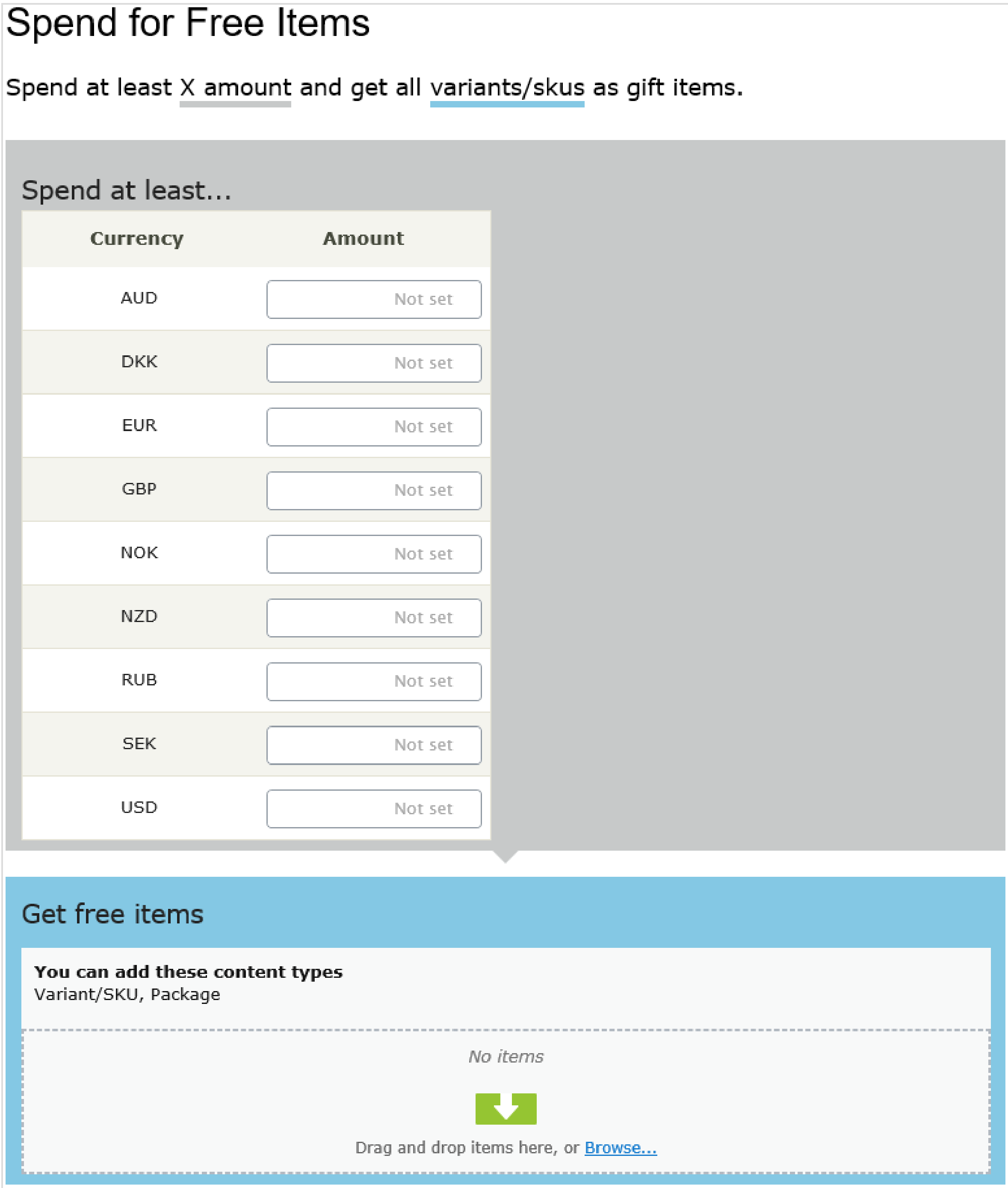


  - The **Get these entries** section also has a **Limit number of discounted items** drop-down that lets you set a maximum number of discount-eligible items, if desired. See also: **How Optimizely Commerce determines which items to discount**.
- **At the following discount**. Choose how to calculate the 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.



The view has two sections:

- **Spend at least...**. Displays all currencies for the campaign's target market. Enter a minimum qualifying amount for each eligible currency. If no amount is entered, the discount is not available for that currency.
- **Get free items**. Select variants/SKUs or packages that are automatically added to an order when the minimum amount is spent.

  To give away the same product more than once, select it multiple times.

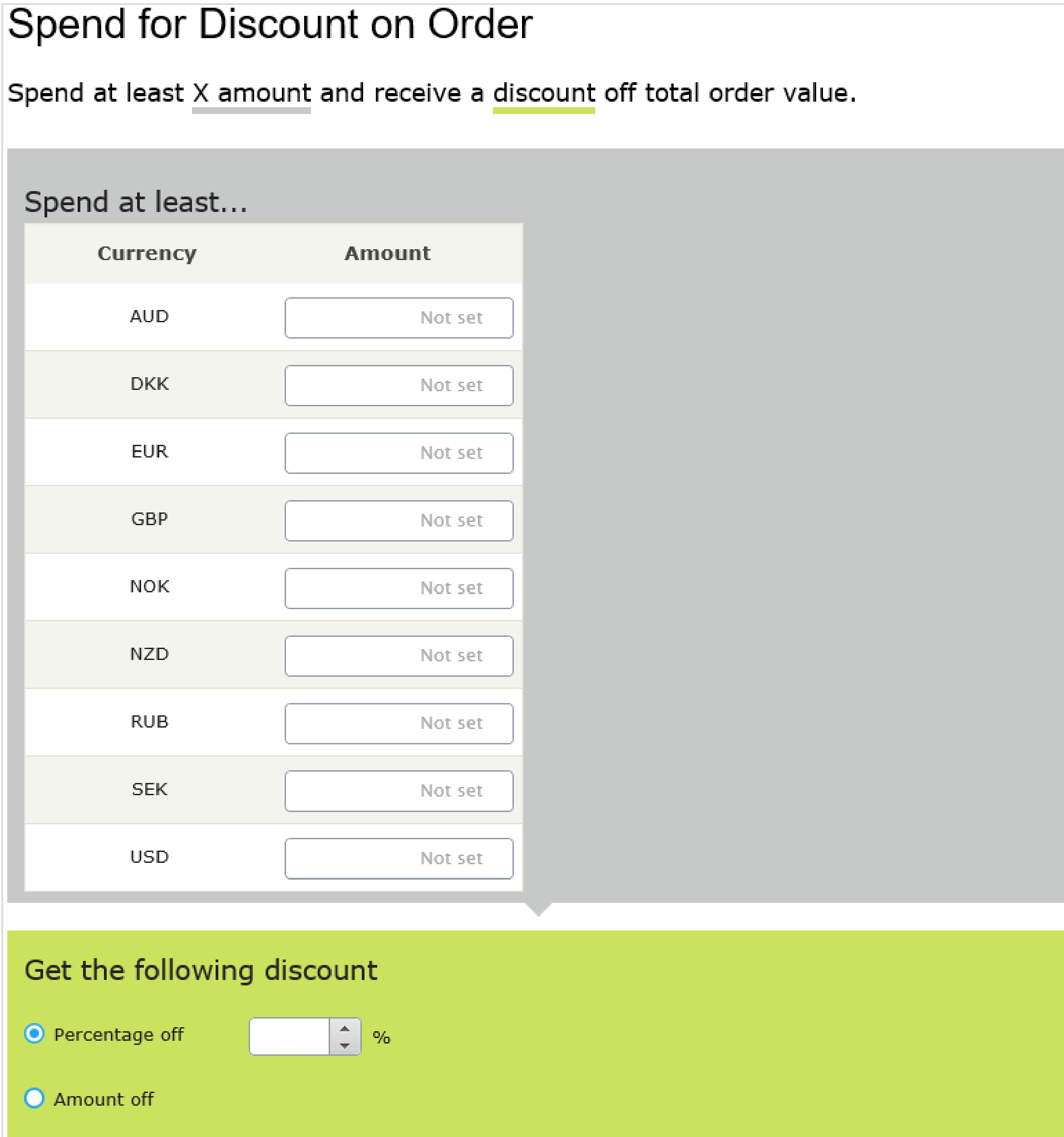
Order discounts

Spend for discount on order

Spend a minimum amount to get a discount on an entire order. For example, spend at least €100 and get 10% off the order total.

Shipping and taxes excluded from the calculation of the order total. Also, if other discounts are applied to an order before this discount which reduce the order total below the minimum, this discount is not applied.

> **Note:** With this discount, you typically set a redemption limit of 1 per order. See **Applying redemption limits**.
>
> For example, you create the discount "Spend at least $1000 and get $100 discount off total order amount" but set no redemption limits. If a customer purchases $2000 worth of items, a discount of $200 is applied. To limit the discount to $100, set a redemption limit of 1.



The view has two sections:

- **Spend at least....** Define a minimum order value for each currency for which you want to provide a discount. If no amount is entered for a currency, no discount is available for it.

- **At the following discount**. Choose how to calculate the discount.
  - **Percentage off**. Enter the discount as a percentage of the items' cost.
  - **Amount off**. Enter a discount amount for each eligible currency. The discount is only available for currencies with amounts.

> **Note:** The list of currencies is determined by the campaign's target market.

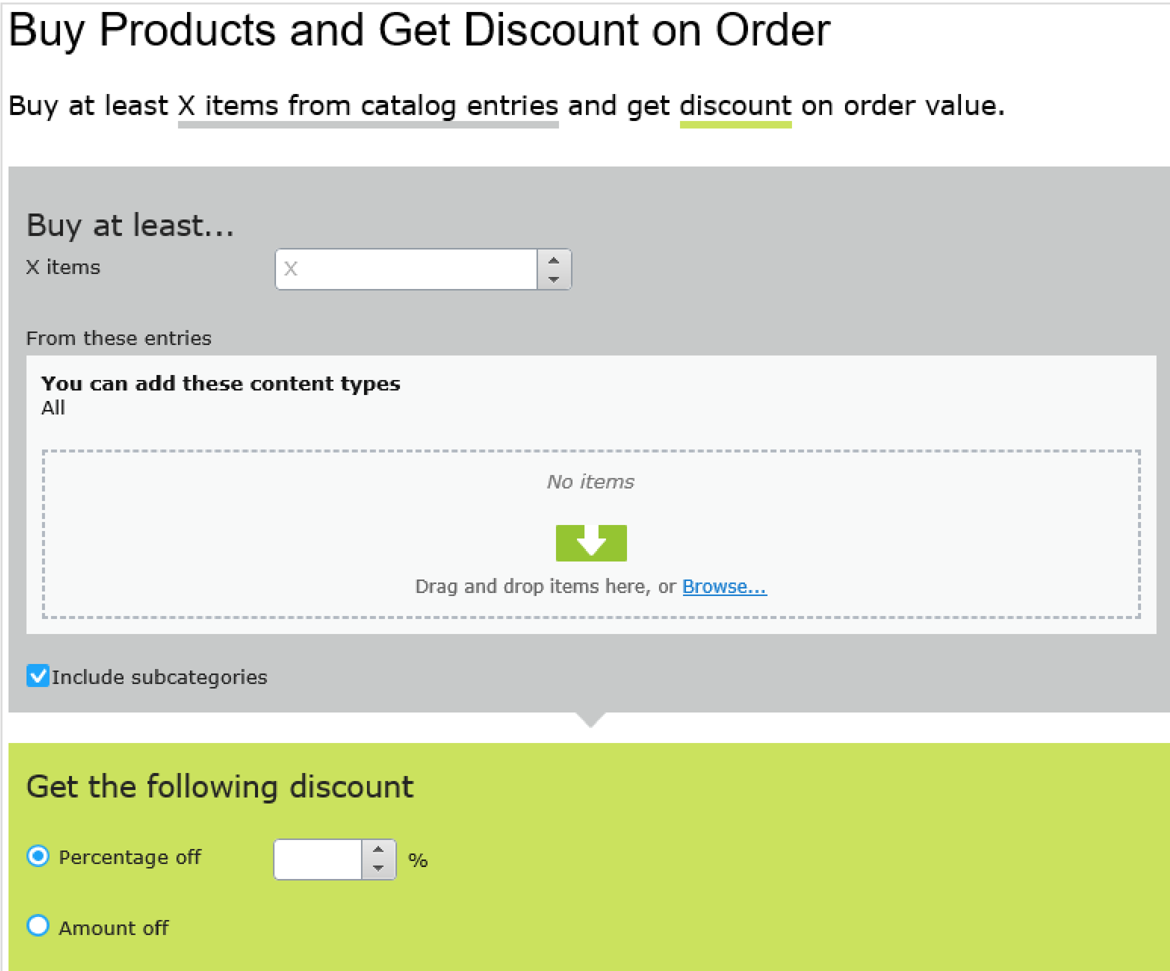
Examples

Spend at least $1000 and get $100 discount off total order amount.

- Customer buys a projector for $1000. There are no shipping costs or taxes. No other discounts or coupons are applied. Customer gets $100 discount, so order total is reduced to $900.
- Customer buys a tablet for $999. The order has a shipping cost of $20 and taxes of $10. Customer does not get the $100 discount because the order total (excluding shipping and taxes) is less than the minimum.
- Customer buys a laptop for $1010. There are no shipping costs or taxes. The order has a promotional code worth $50, which is applied before this discount. Since the adjusted order total, $960, is less than the minimum, the customer does not get the $100 discount.

Buy products and get discount on order

Buy a minimum number of products and reduce the cost of the order. You determine which products are eligible, and whether the discount is an amount or a percentage.



The view has two sections:

- **Buy at least X items...**. Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Get the following discount**. Define the discount as an amount or a percentage
  - If an *amount*, enter an amount for each currency for which you want to provide a discount.

    > **Note:** The list of currencies is determined by the campaign's target market.

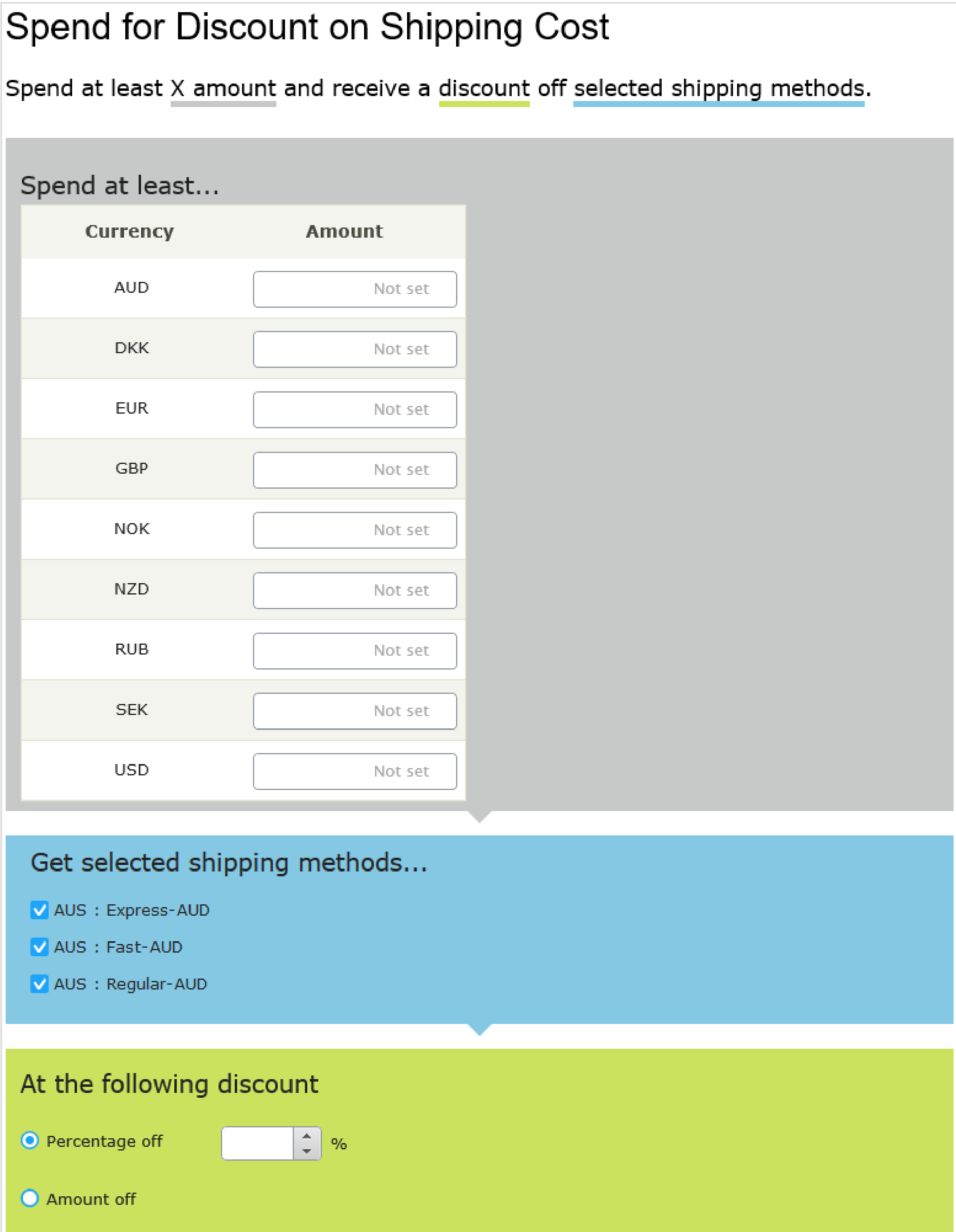
  - If a *percentage*, it applies to all available currencies.

Shipping discounts

Spend for discount on shipping cost

Spend a minimum amount on an order and get discounted shipping costs. The discount can be an amount or a percentage. Also, you choose which shipping methods qualify.

> **Note:** With this discount, you typically set a redemption limit of 1 per order. See **Applying redemption limits**.
>
> For example, you create the discount "Spend at least $100 and get 25% off shipping cost" but set no redemption limits. If a customer purchases $200 worth of items, he gets a 25% discount for each $100, so a 50% discount. To limit the discount to 25%, set a order redemption limit of 1.


Spend for Discount on Shipping Cost
Spend at least X amount and receive a discount off selected shipping methods.
Spend at least...
Currency
Amount
AUD
Not set
DKK
Not set
EUR
Not set
GBP
Not set
NOK
Not set
NZD
Not set
RUB
Not set
SEK
Not set
USD
Not set
Get selected shipping methods...
AUS : Express-AUD
AUS : Fast-AUD
AUS : Regular-AUD
At the following discount
Percentage off
%
Amount off

The view has three sections:

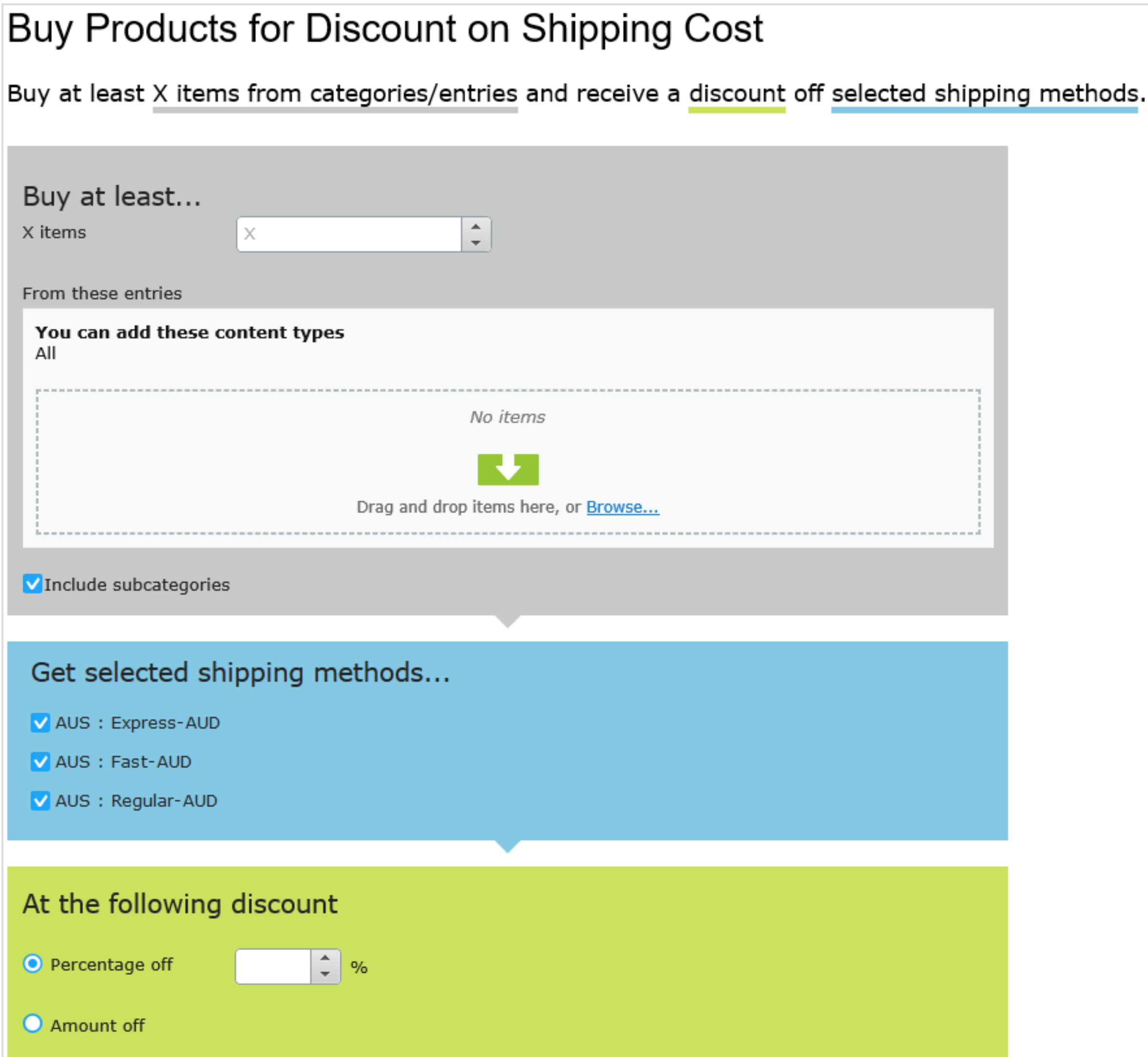
- **Spend at least.**. Enter a minimum order amount needed to qualify for the shipping discount. This section displays all currencies for the campaign's target market. Enter a minimum qualifying amount for each eligible currency. If no amount is entered, the discount is not available in that currency.
- **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.



The view has three sections:

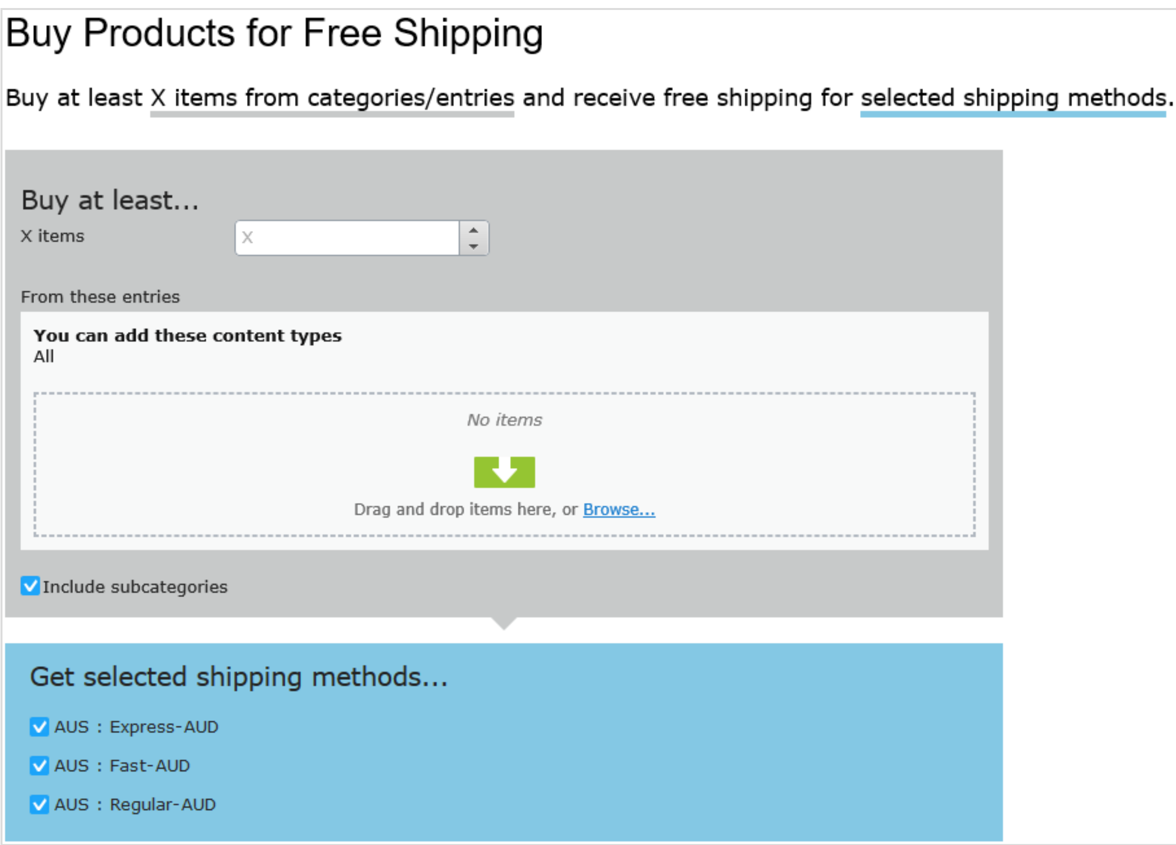
- **Buy at least X items....** Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Get selected shipping methods....** Select shipping method eligible for a discount. This section displays all enabled shipping methods for a campaign's target market. Preceding each method is its market.

- **At the following discount**. Choose how to calculate the discount.
  - **Percentage off**. Enter the discount as a percentage of the items' cost.
  - **Amount off**. Enter a discount amount for each eligible currency. The discount is only available for currencies with amounts.

> **Note:** The list of currencies is determined by the campaign's target market.

Buy products for free shipping

Buy a minimum number of items to get free shipping. For example, buy at least 3 ties and get free shipping. You determine which shipping methods are eligible.

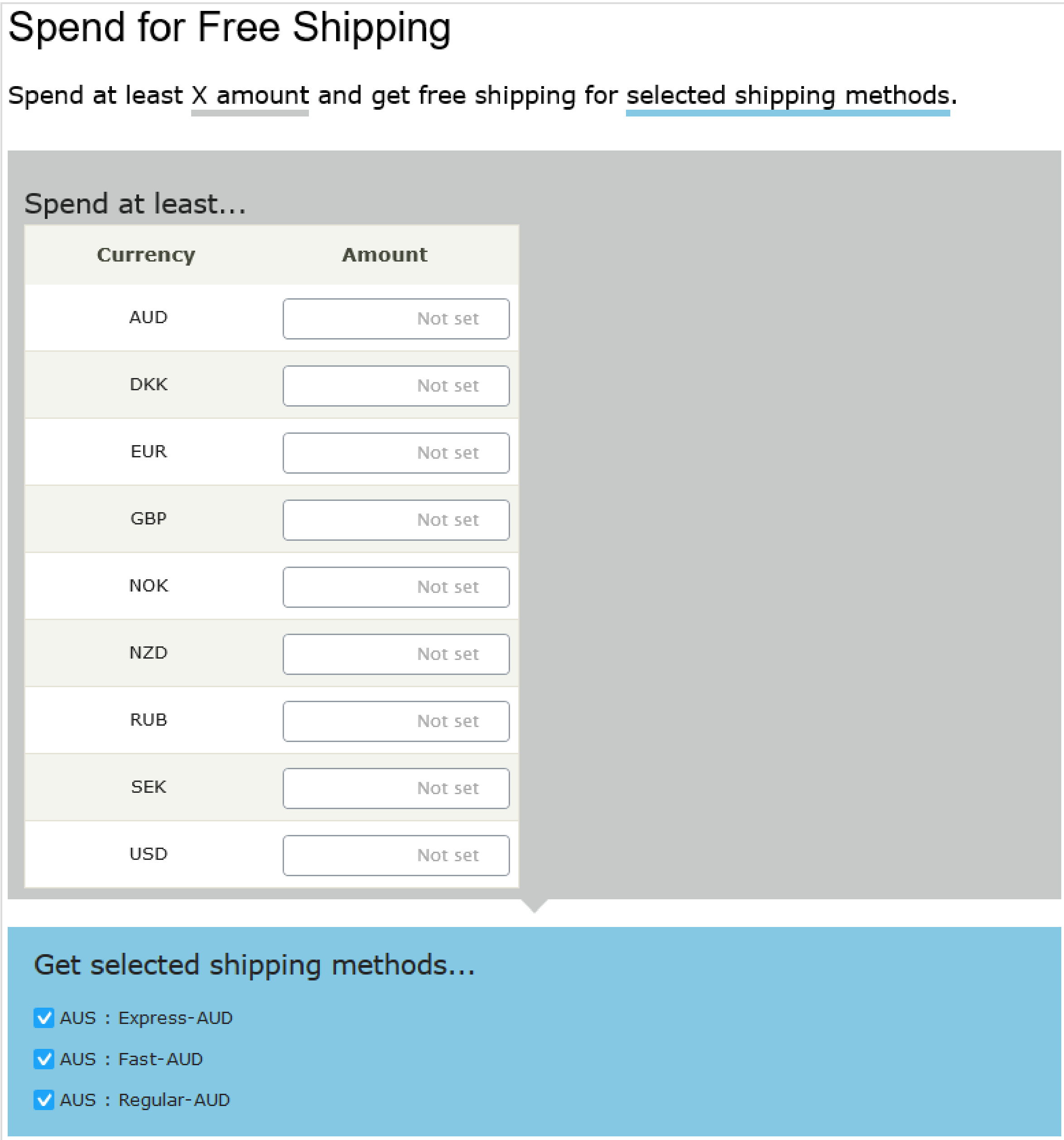


The view has two sections:

- **Buy at least X items...**. Enter the number of items then the categories, products, and so on from which customers may pick. See also: Selecting discount-eligible items.
- **Get selected shipping methods...**. Select the shipping method that will be free with this discount. This section displays all enabled shipping methods for a campaign's target market. Preceding each method is its market.

Spend for free shipping

Spend a minimum amount of money to get free shipping. For example, spend $100 and get free shipping. You determine which shipping methods are eligible.



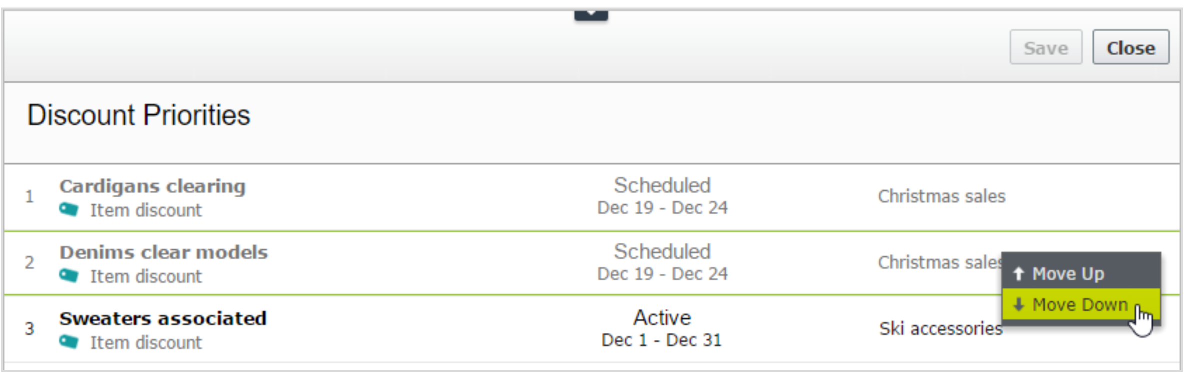
The view has two sections:

- **Spend at least....** Enter a minimum order amount needed to qualify for free shipping. This section displays all currencies for the campaign's target market. Enter a minimum qualifying amount for each eligible currency. If no amount is entered, the discount is not available in that currency

- **Get selected shipping methods....** Select the shipping method that will be free with this discount. This section displays all enabled shipping methods for a campaign's target market. Preceding each method is its market.

Prioritizing discounts

Marketers often run multiple campaigns and discounts in parallel, with possible overlaps. The **Discount Priority** view lets you prioritize discounts, so you can determine the sequence in which active ones are applied. The view displays discounts in priority order (highest one at top), and includes all statuses (active, inactive, scheduled, and expired).



Adjusting discount priorities

From the Campaign view, click **Discount Priorities and Exclusions** in the top right .

To prioritize discounts, use the context menu or drag and drop them within the list. Click **Save** when done.

How prioritization works

- Only active discounts are applied.
- If multiple discounts apply to a product, the top active discount is applied first, followed by lower ones.
- If two discounts are excluded from being applied simultaneously, the higher priority discount is applied and the lower one is ignored. See also: **Discount exclusions**.

Examples

Assumption: Product's original cost is $100.

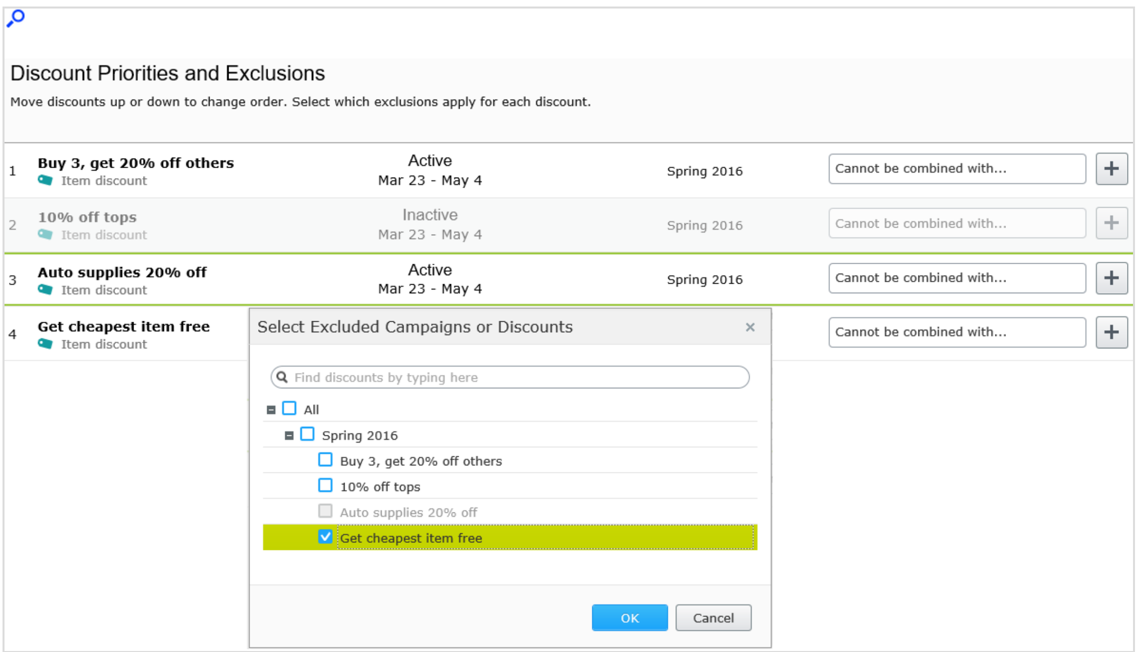
- **Example 1: Two discount percentages**
  - First discount: percentage 20%
  - First discount amount: $20
  - Adjusted price: $80
  - Second discount: percentage 30% (of $80)
  - Second discount amount: $24
  - Final adjusted price: $56
- **Example 2: Two discount amounts**
  - First discount: amount $20
  - Adjusted price: $80
  - Second discount: amount $30
  - Final adjusted price: $50
- **Example 3: One percentage, one amount**
  - First discount: percentage 20%
  - Adjusted price: $80
  - Second discount: amount $30
  - Final adjusted price: $50
- **Example 4: One amount, one percentage**
  - First discount: amount $30
  - Adjusted price: $70
  - Second discount: percentage 20%
  - Second discount amount: $14
  - Final adjusted price: $56

Discount exclusions

To any discount, you can apply *exclusions*: campaigns or discounts that cannot be combined with the current discount. You can apply an exclusion to individual discounts, all discounts in one more campaigns, or all other discounts.

For example, you are running a sale where automotive supplies are 20% off. Customers should not be able to combine this discount with the *Get cheapest item free* discount. To create this exclusion, follow these steps.

1. From Campaign view, click **Discount Priorities and Exclusions** in the top right ().
2. Select the discount to which you will apply exclusions. To continue the above example, select **automotive supplies 20% off**.
3. Click **Add +** to the right of the **Cannot be combined with...** field.

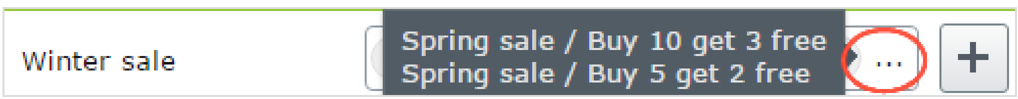


4. Select campaigns or discounts that cannot be combined with the one selected in step 2. To continue the above example, select the **Get cheapest item free** discount.
5. Click **Save** then **Close**.

Additional notes about exclusions

- You can apply an unlimited number of exclusions to a discount.
- If you select a campaign, you exclude *all* of its discounts, both current *and* future.
- The **Cannot combine with** field
  - After you select an exclusion, it appears in the **Cannot combine with** field for reference and possible removal.

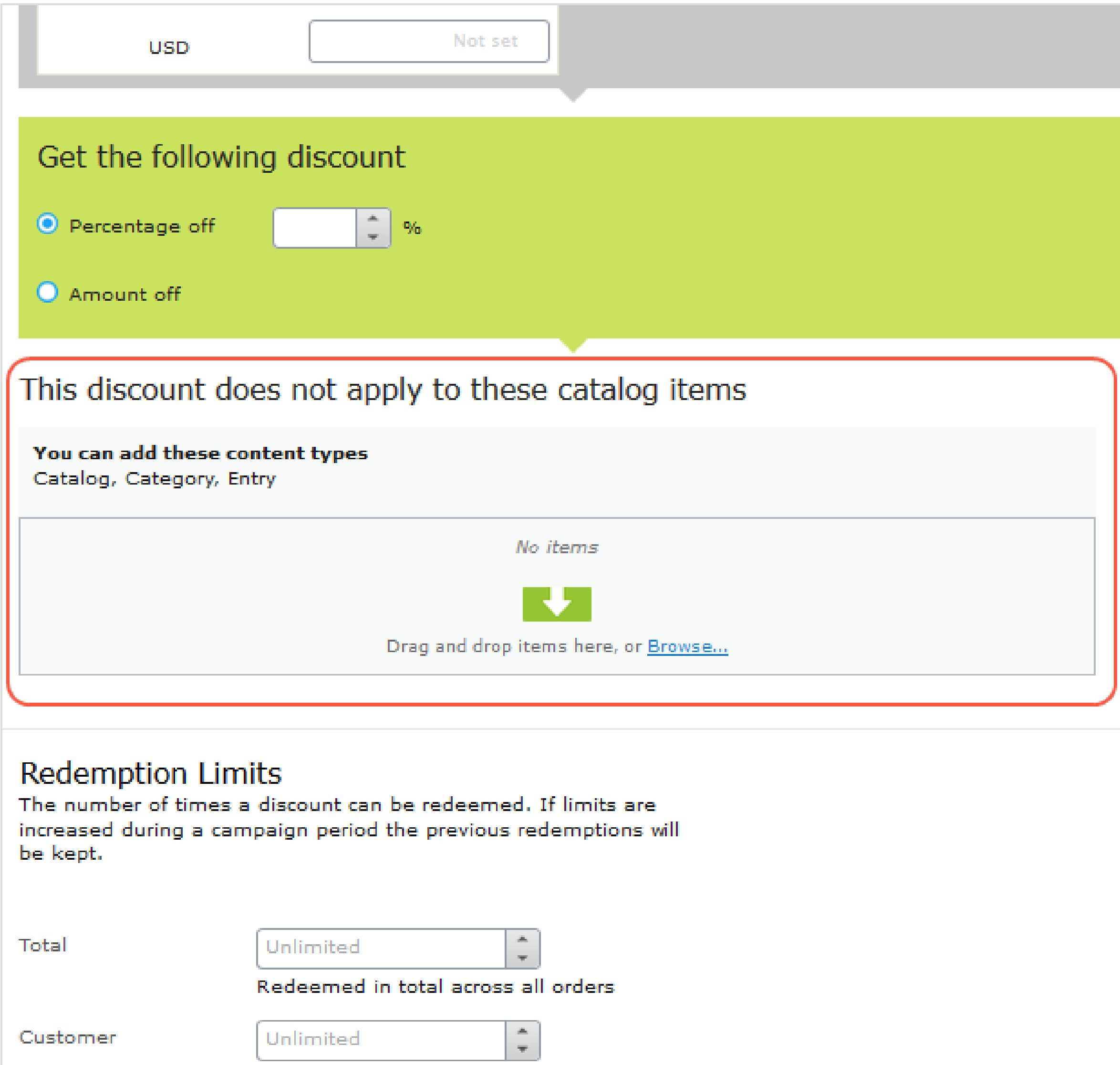
- The **Cannot combine with** field displays campaigns first, followed by discounts.
- If you select **All** (the campaign root folder), only that tag appears in the **Cannot combine with** field.
- Similarly, if you exclude a discount then later exclude its parent campaign, the discount's tag is removed from the **Cannot combine with** field. This is because the parent campaign includes the child discount.
- If more than two items are excluded, an ellipsis in the **Cannot combine with** field indicates additional entries. To view all exclusions for that discount, click **Add** or hover over the ellipsis.



Exclude catalog items from a discount

This topic explains how to exclude catalogs, categories, or catalog entries from a specific discount. For example, you want to exclude men's Puma sneakers from a store-wide 25% off sale.

1. Select the campaign then the discount to which you want to apply the exclusion.
2. On the **Edit Discount** view, scroll down to **This discount does not apply to these catalog items**.
3. Choose one or more catalogs, categories, or catalog entries to exclude from the discount.


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
Unlimited
Redeemed in total across all orders
Customer
Unlimited

Reporting

You can collect various types of data from Optimizely Commerce, for example order and subscription data for a desired time range. The output is available in the Report view, or as files for export to be consumed by other applications.

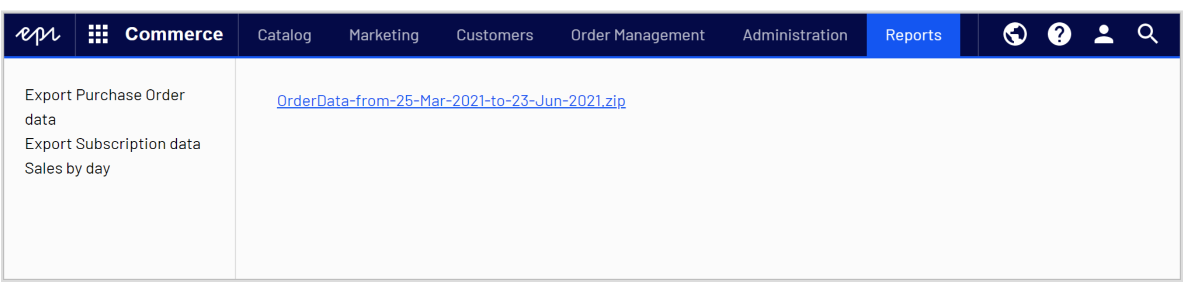
Collecting report data

Data can be collected through scheduled jobs or through code using events, see Optimizely World for technical details. Configuration of scheduled jobs is done from the CMS Admin view.

> **Note:** You need to be an administrator to configure the scheduled jobs to run the data collection, contact your system administrator for assistance.

Accessing report data

Select the **Reports** option in the top menu to access report data.

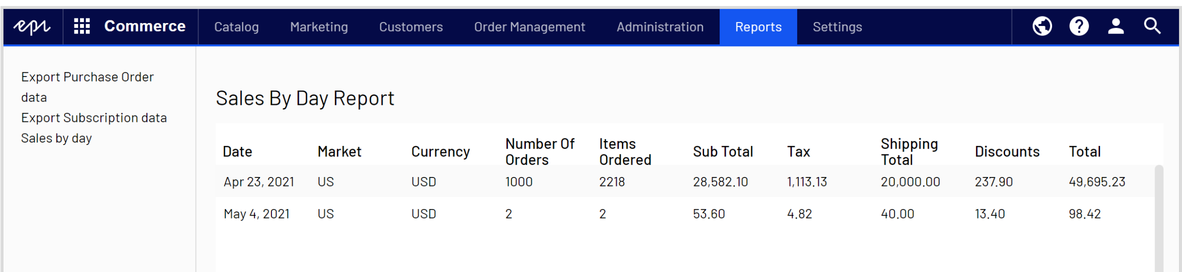


Purchase Order and Subscription reports

Running the Collect subscription data for reports scheduled job will generate data for these reports. The data is made available as zipped CSV files, click a file to download it. The data can be exported into for example analytic tools for further processing.

Sales by day report

Running the Collect order data for reports scheduled job will generate data for this report. The report shows daily order information as described in the following.



- **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.
  - Number of orders.
  - Number of items in those orders.
  - Subtotal (quantity x placed price - entry discount amount).
  - Tax amount for those orders.
  - Shipping amount for those orders.
  - Discount amount for those orders.
  - 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.

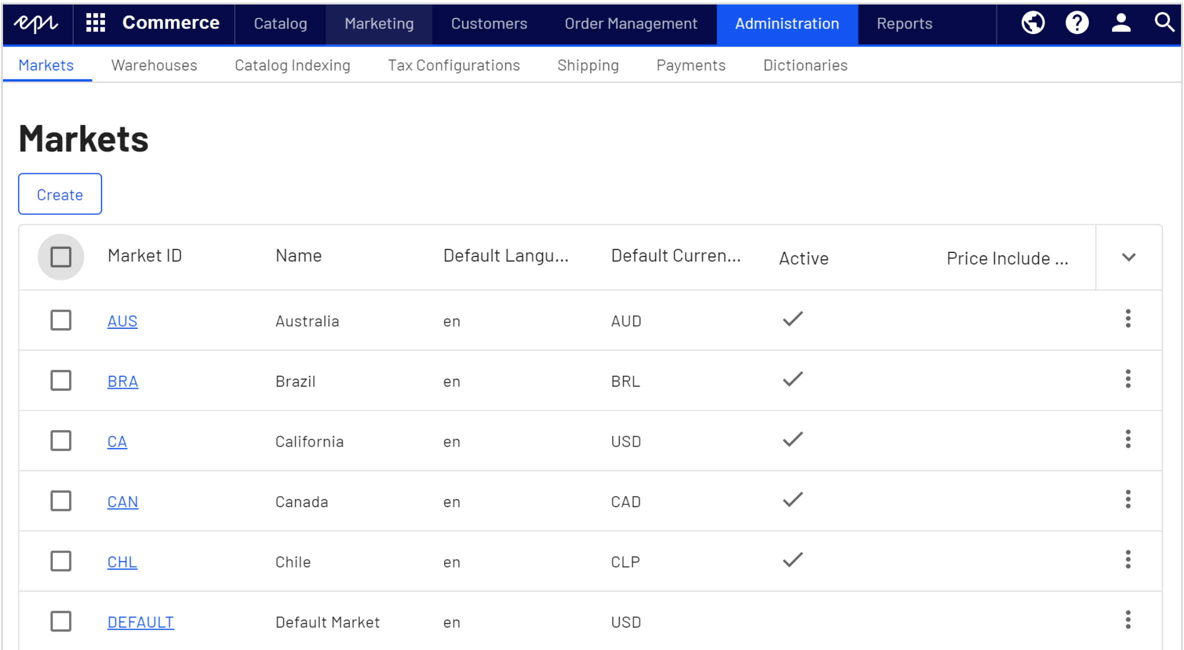
The administration user interface in Optimizely Commerce lets you configure and apply specific settings for various parts of the system, for example markets, payments, and shipping, used when working with catalogs and order management.

> **Note:** The descriptions in the following apply to **Commerce version 14 and higher**. Some functionality previously configured from the Optimizely Commerce user interface, is now configured through code. Contact your system administrator for more information. See the latest Commerce version 13 user guide. See also previous versions of this user guide, and Optimizely World for details.

The administration view

You can do the following from the **Administration** view in Optimizely Commerce:

- Define markets to be used for example for catalogs and campaigns.
- Add and define warehouses used for displaying stock availability information.
- Update the search index for the website to reflect changes to the product catalog.
- Configure taxes used for catalog management and the ordering process.
- Define shipping and payment methods used for the ordering and fullfillment processes.
- Work with dictionaries to add property values used to extend for example product data.

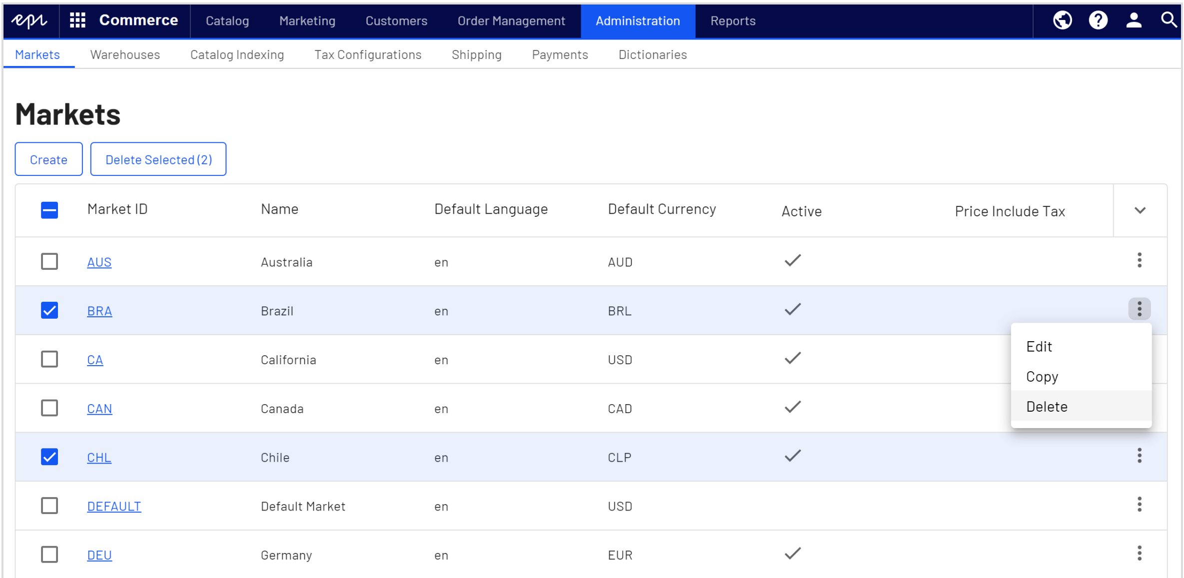


Working in the administration view

To **edit** an item in a list in the **Administration** view, click the item link, or select **Edit** from the context menu for the item.

To **copy** or **delete** a single item in a list, select the option from the context menu. Copying an item is useful when creating another similar item.

To **delete multiple** items in a list, select the desired items, click **Delete Selected**, and **OK** to confirm.



Other configurations

Some features available in Commerce are configured from the Optimizely CMS editing and administration views.

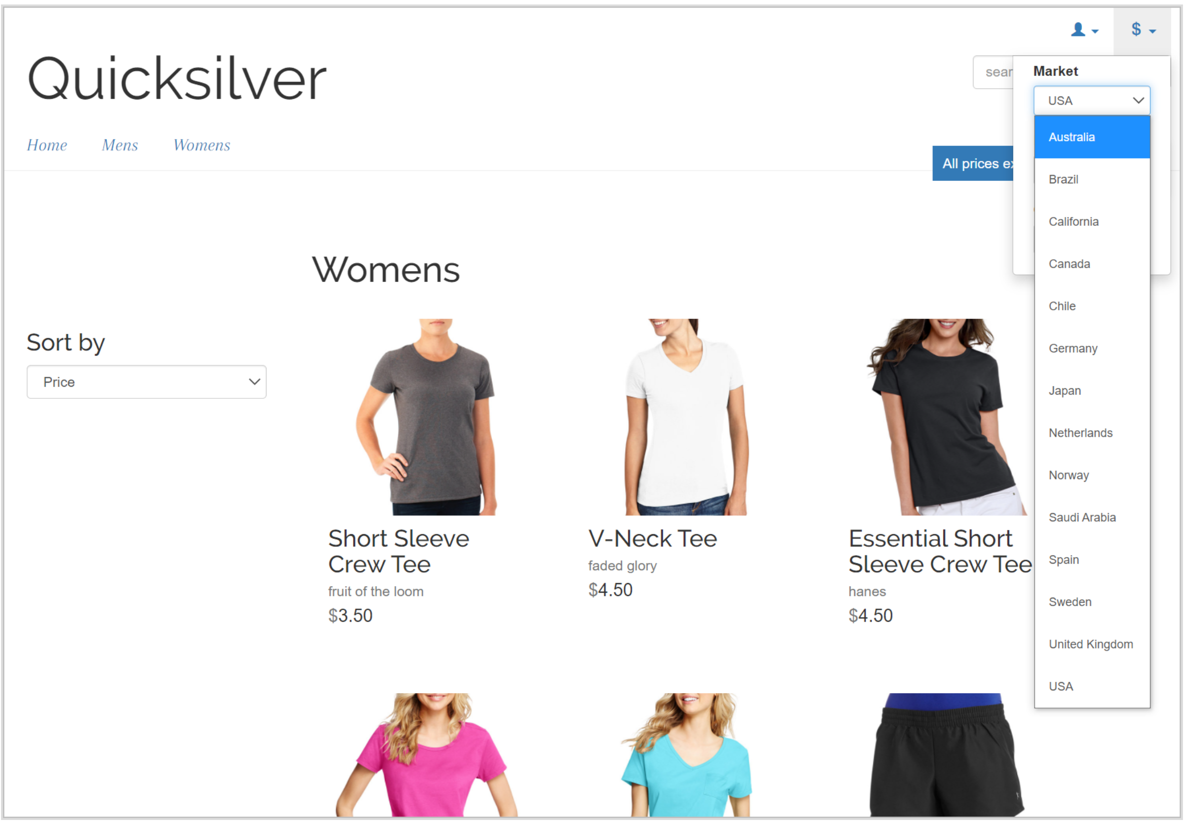
- **Languages** for content on the Commerce front-end site, see Managing website languages.
- **Permissions** for managing access to Commerce-specific functions, see Access rights.
- **Scheduled jobs** for running for example batch updates, see Scheduled jobs.

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 visitor select a market on the front-end. Others use different URLs for different markets, such as "yoursite.uk" and "yoursite.de". A site can also extract a visitor's geographic location from the IP address to determine the appropriate market.



Working with markets

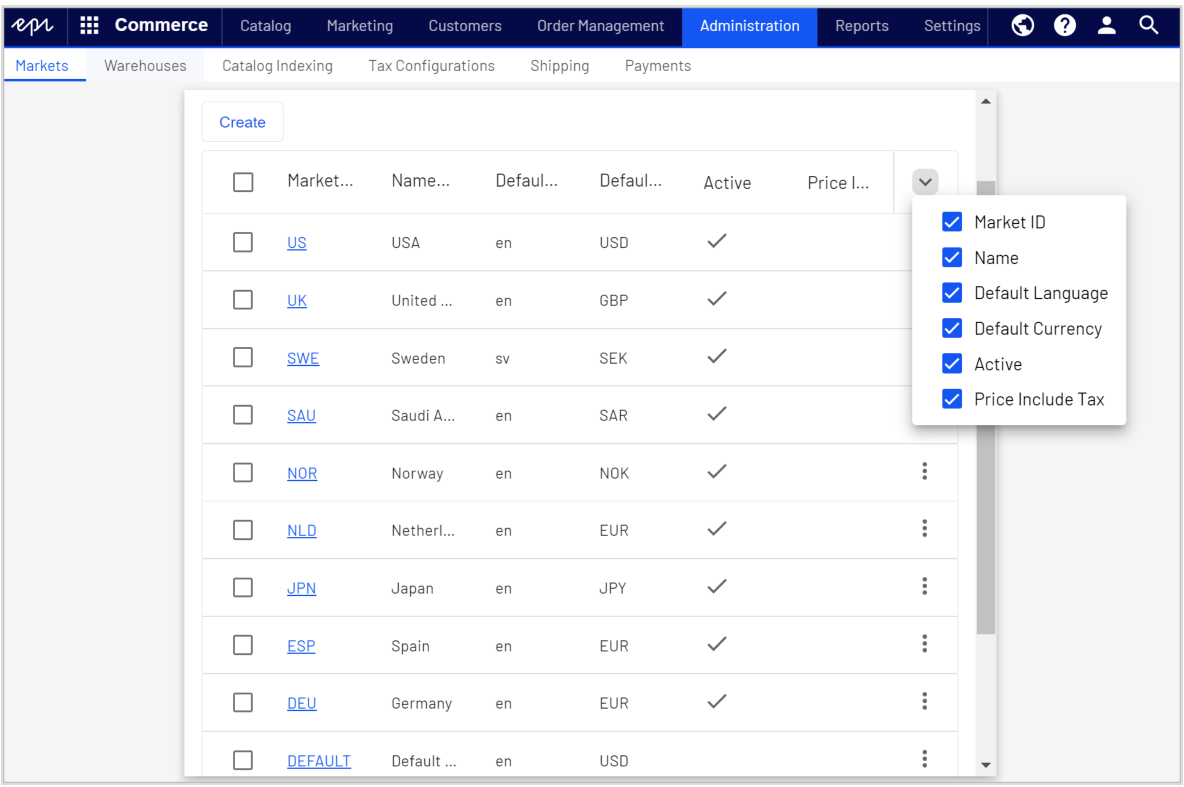
- When working in the Catalog View, you can filter results by market.
- When defining a variant's pricing information, you assign a market then its price in an appropriate currency.
- Order Management objects like purchase orders, shopping carts, and subscriptions can be filtered by market.

- By defining a market's language, content can automatically be displayed in that language when the market is selected on the front-end.

Browsing markets

The market overview under **Administration** displays existing markets with their languages, currencies and status, and whether the prices include tax.

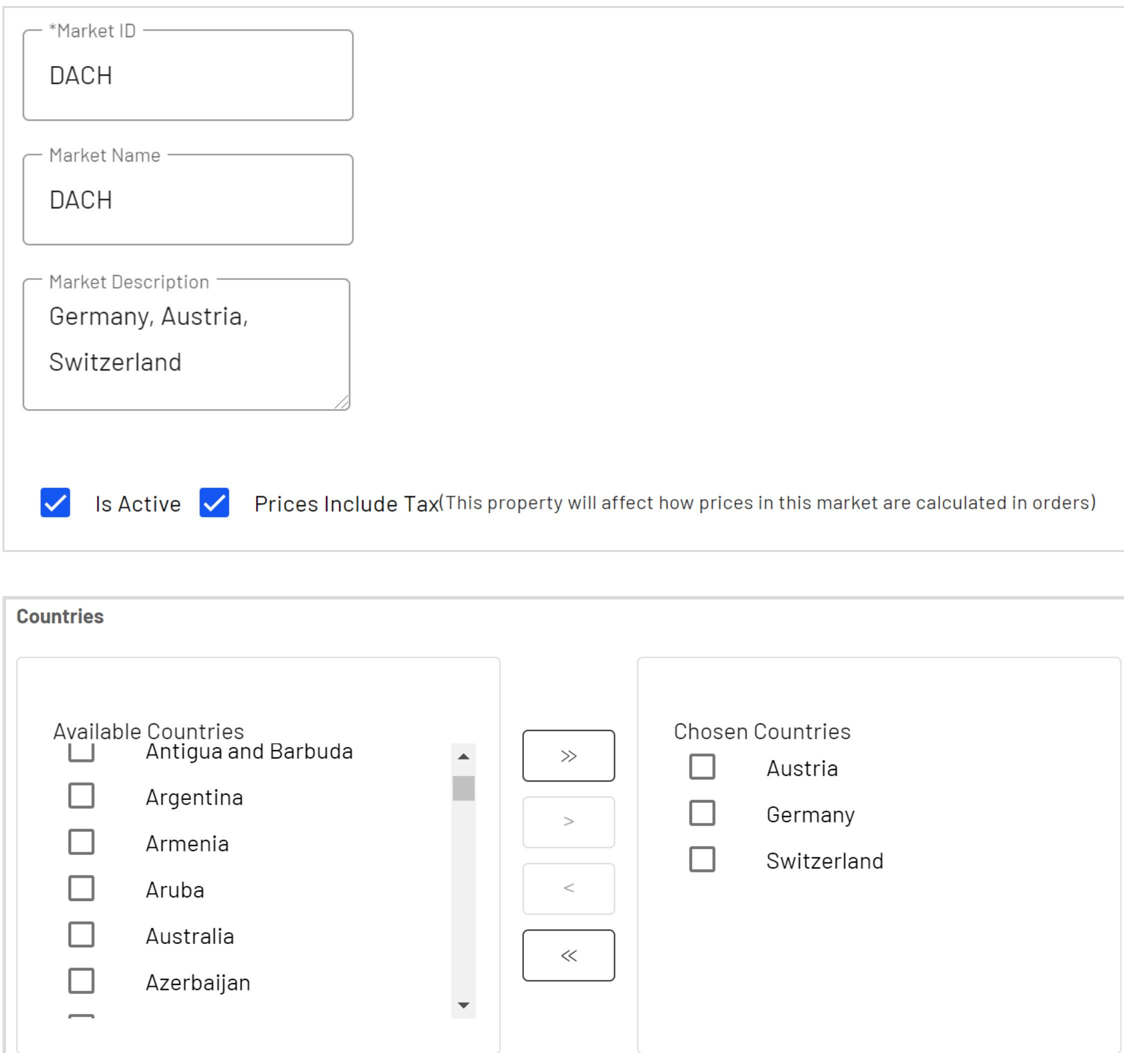
Click a column header to sort the information on that property. You can also select which columns to display in the overview.

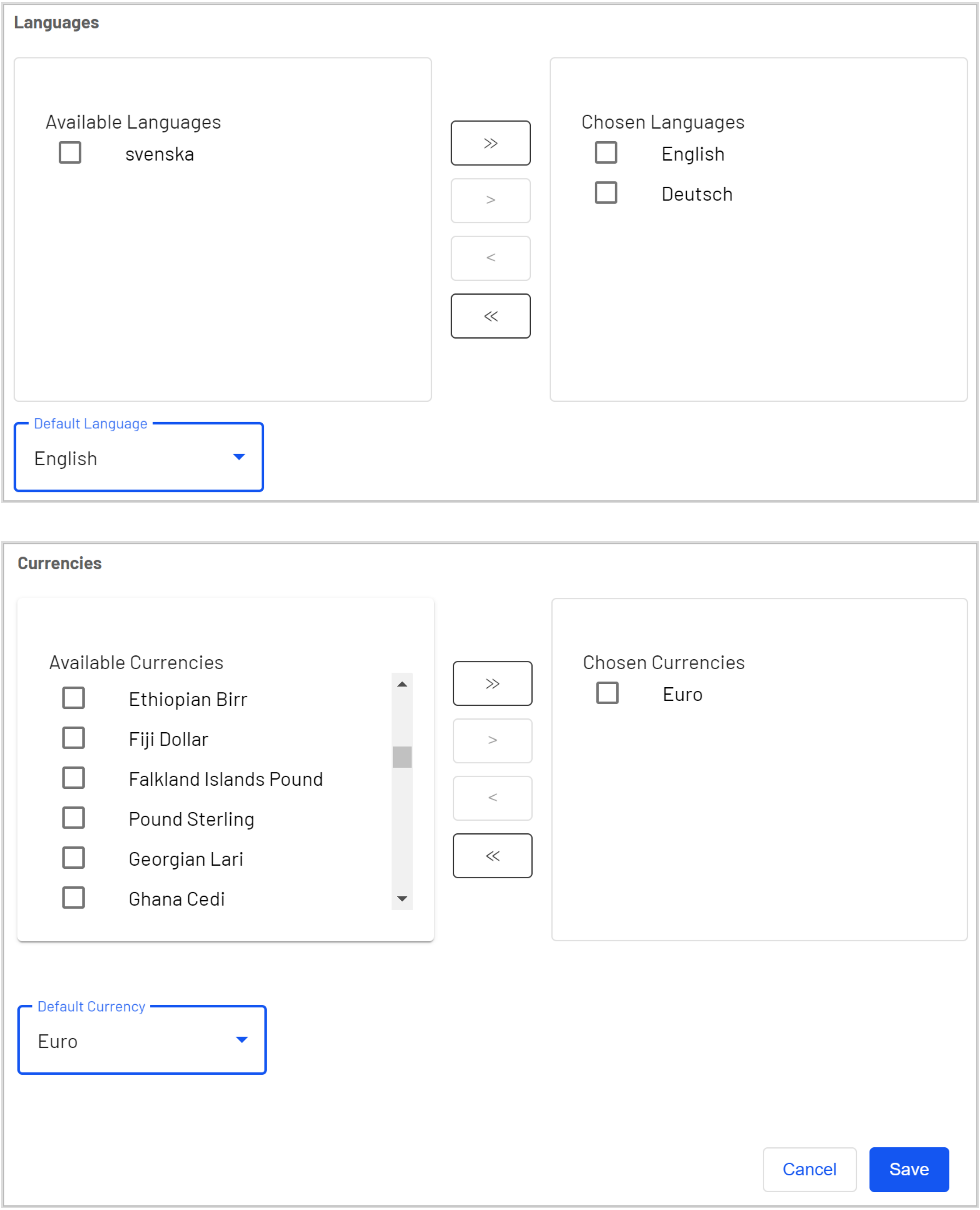


Note: The **Default Market** defines the language and currency used as a fallback for markets that are not specified.

Creating or editing a market

1. In the **Administration** view, click **Markets**.
2. Click a market in the list to edit the settings, or click **Create**.
3. Fill in displayed fields as described in the following, and click **Save** when done.





- **Market ID**. The identifier for the market.
- **Market Name**. The name that appears in the markets list.

- **Market Description**. Explanation of the market (free-text).
- **Is Active**. Select to activate. Only active markets are available to visitors.
- **Prices Include Tax**. Select to indicate that returned prices include tax. This is typically used for markets where prices include tax, for example in the EU. The setting can be used to add checkout functionality displaying a tax-included price on the front-end.
- **Countries**. Desired countries to include in the market.
- **Languages**. Languages for the market. Note that languages need to be enabled on the site, to become available for selection here.
- **Default Language**. Default fallback language.
- **Currencies**. Desired currencies for the market.
- **Default Currency**. Default fallback currency.

Deleting a market

1. Select one or more markets from the list in the overview.
2. Click **Delete Selected**, and click **OK** to confirm.

Warehouses

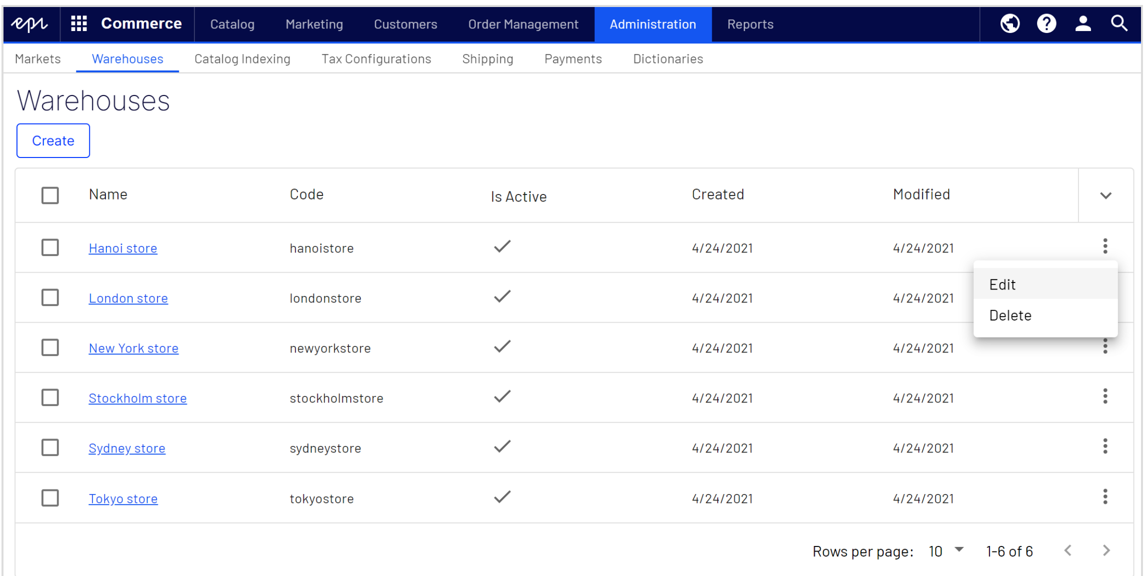
> **Note:** This topic is intended for administrators and developers with administration access rights in Optimizely.

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.

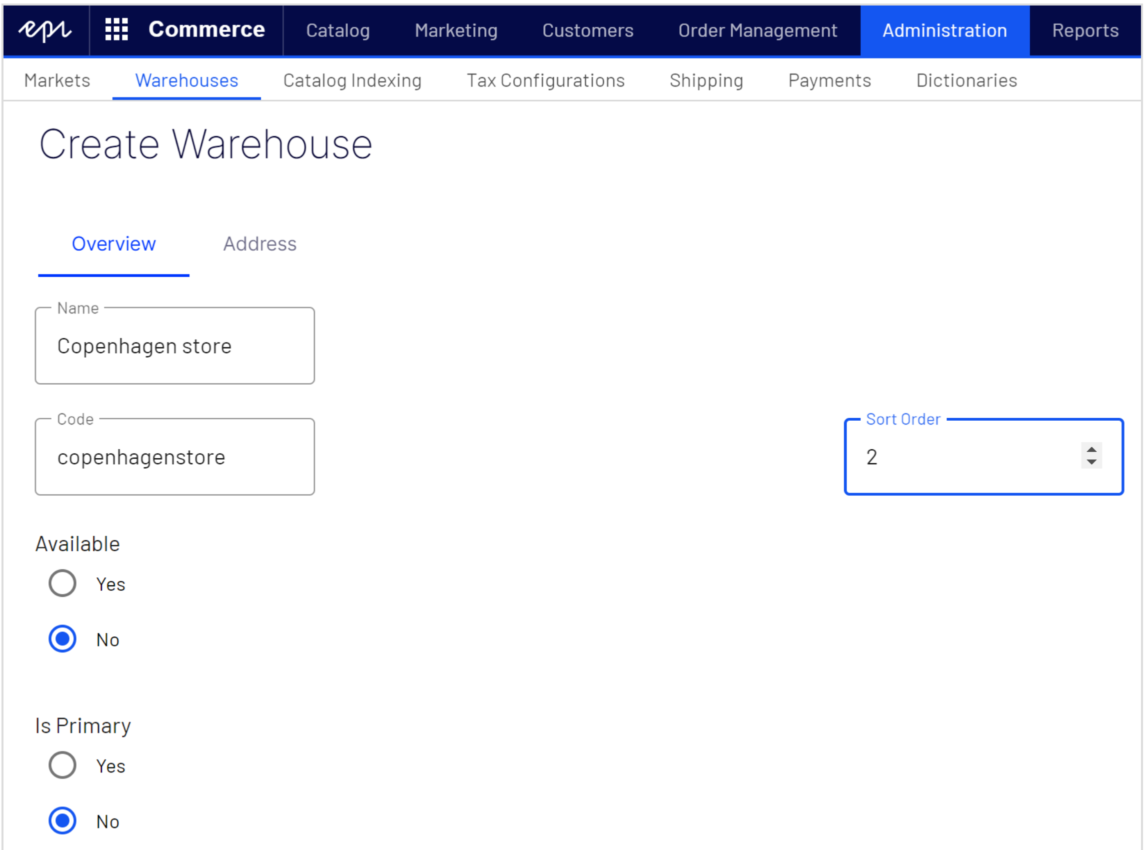
Warehouses can be set up differently, and are often integrated with external systems. You can check in-store stock, reserve and pick up in-store, and deliver to store. By default in Optimizely Commerce, you specify the warehouse where the item is being stored when you create a product variant.

Creating and editing warehouses

1. Open the **Administration** view and select **Warehouses**.
2. In the **Manage Warehouses** overview, click **Create** to add a new warehouse, or select **Edit** in the context menu to modify an existing one.

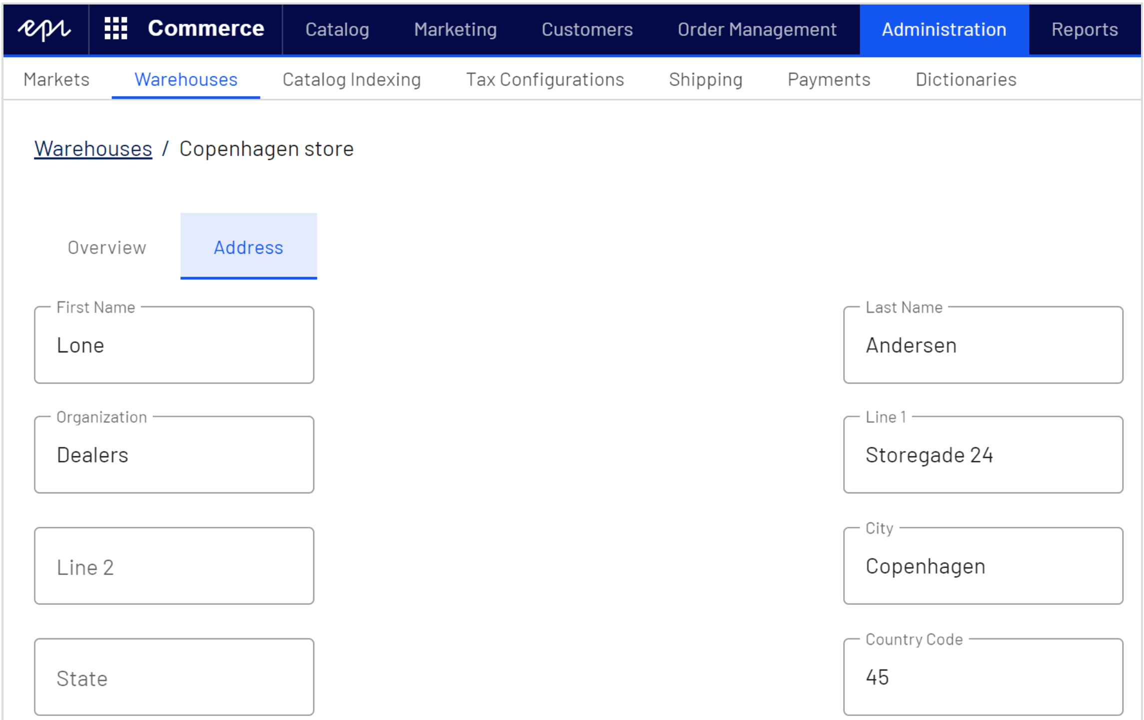


3. Enter information for the **Overview** tab.



- **Name**. Enter the name of the warehouse.
- **Code**. Enter the location code for the warehouse.
- **Sort Order**. Sort order for the category entry.
- **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 in the **Address** tab.



5. Click **Save**.

Deleting a warehouse

In the **Manage Warehouses** overview, select **Delete** in the context menu for the warehouse you want to delete. Click **OK** to confirm.

Updating a catalog search index

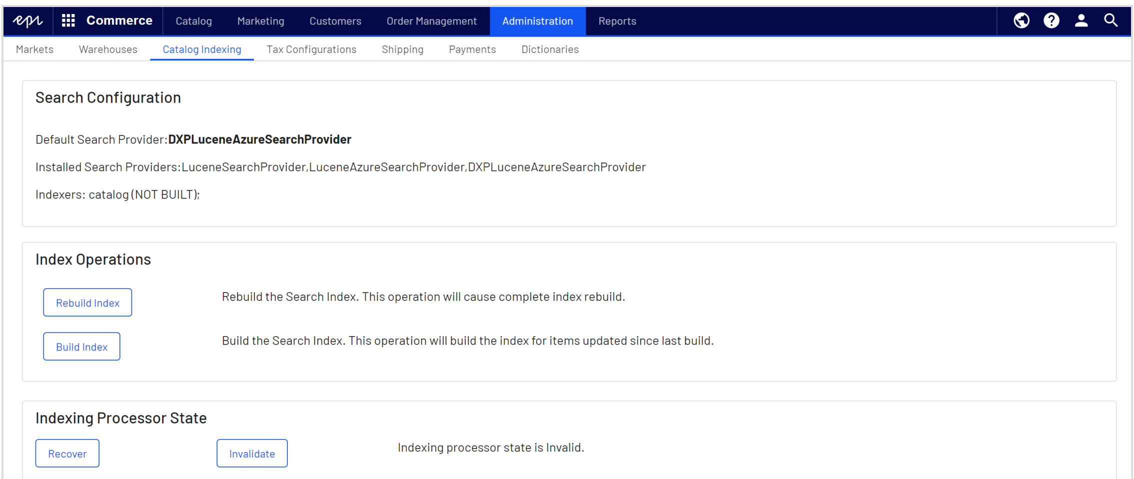
> **Note:** This topic is intended for administrators and developers with administration access rights in Optimizely.

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).

Building and rebuilding the catalog index

1. Open the **Administration** view and select **Catalog Indexing**.



2. Click **Rebuild Index** or **Build Index**.
3. After performing the operation, changes are reflected in the search results.

Configuring taxes

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

You can 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 these methods:

- Creating or editing tax controls manually
- Importing taxes through a CSV file
- Exporting taxes through a CSV file

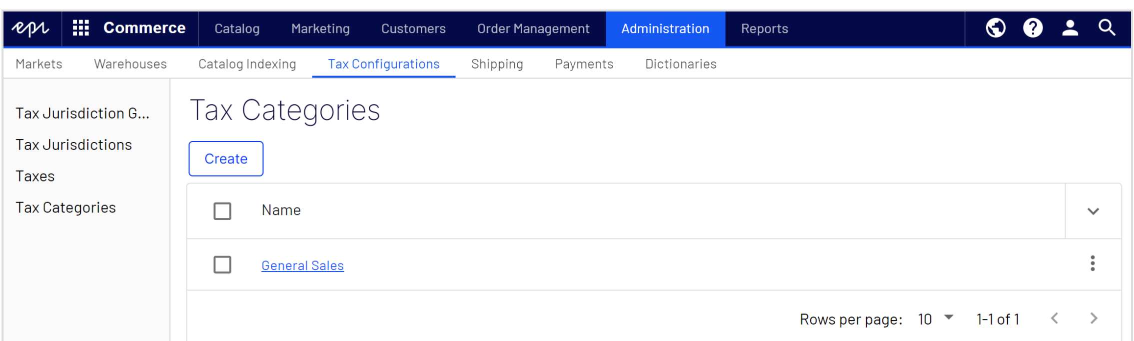
Defining countries and regions

To configure taxes, first define the countries and regions where you plan to sell products, using the correct country ISO codes for tax calculations to work properly (for example, during checkout). Countries and regions are defined through code, see Optimizely World for technical details.

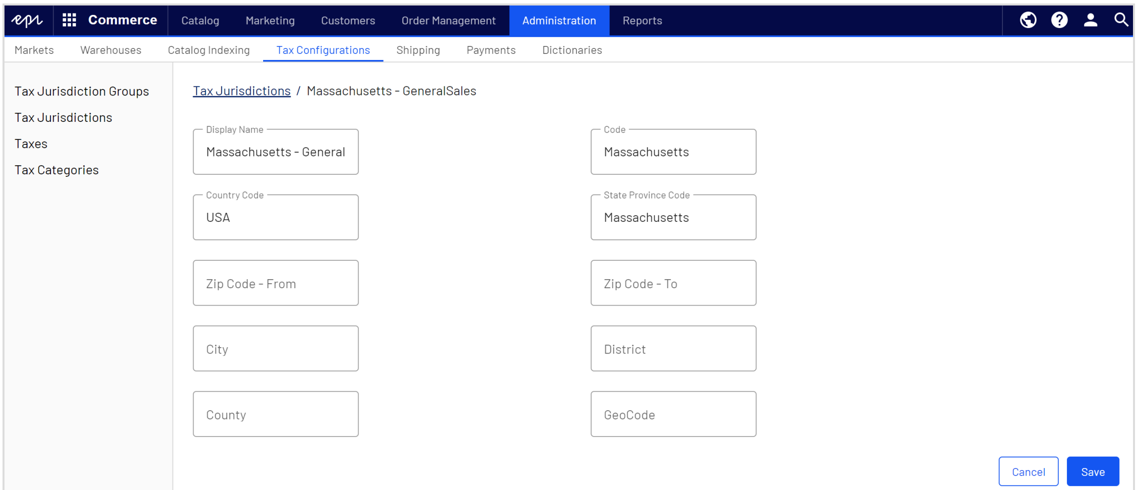
Configuring taxes manually

To set up taxes manually, open the **Administration** view, select **Tax Configuration**, and use the following steps.

1. **Create tax categories**.
   Select **Tax Categories** to create categories that are used to associate catalog items with defined tax rates. For example, you can create categories such as *General Sales*, *Food*, and *Luxury* items, depending on tax regulations for these item types.

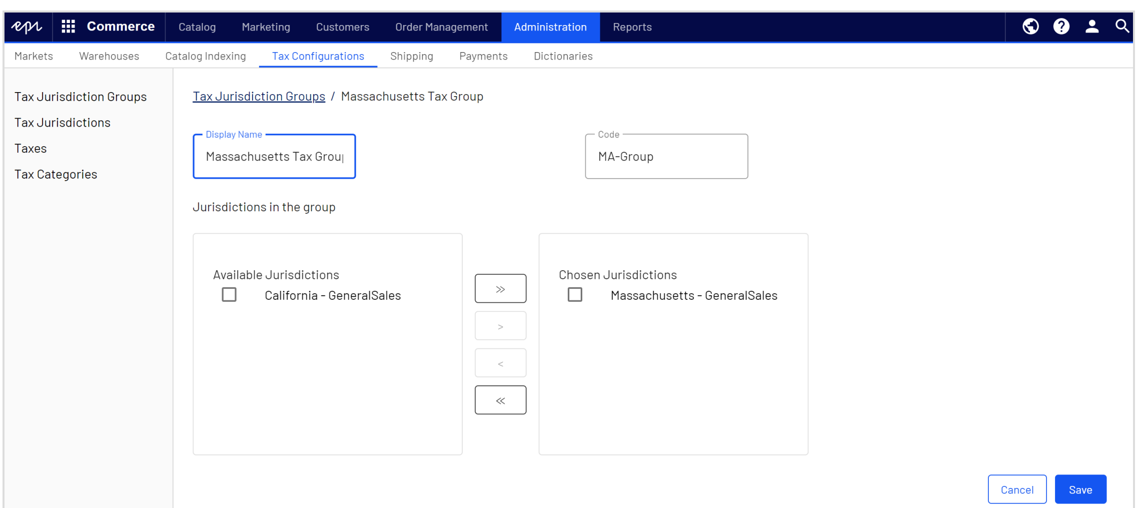
   

2. **Create and configure tax jurisdictions.**
   Select **Tax Jurisdictions** to specify particular jurisdictions for a region by defining zip codes, and country codes, and so on. Tax rates are applied to whatever level of information you specify for each jurisdiction. For example, if you specify only the country code as US, customers with a US address (regardless of state and county) are included in this jurisdiction.



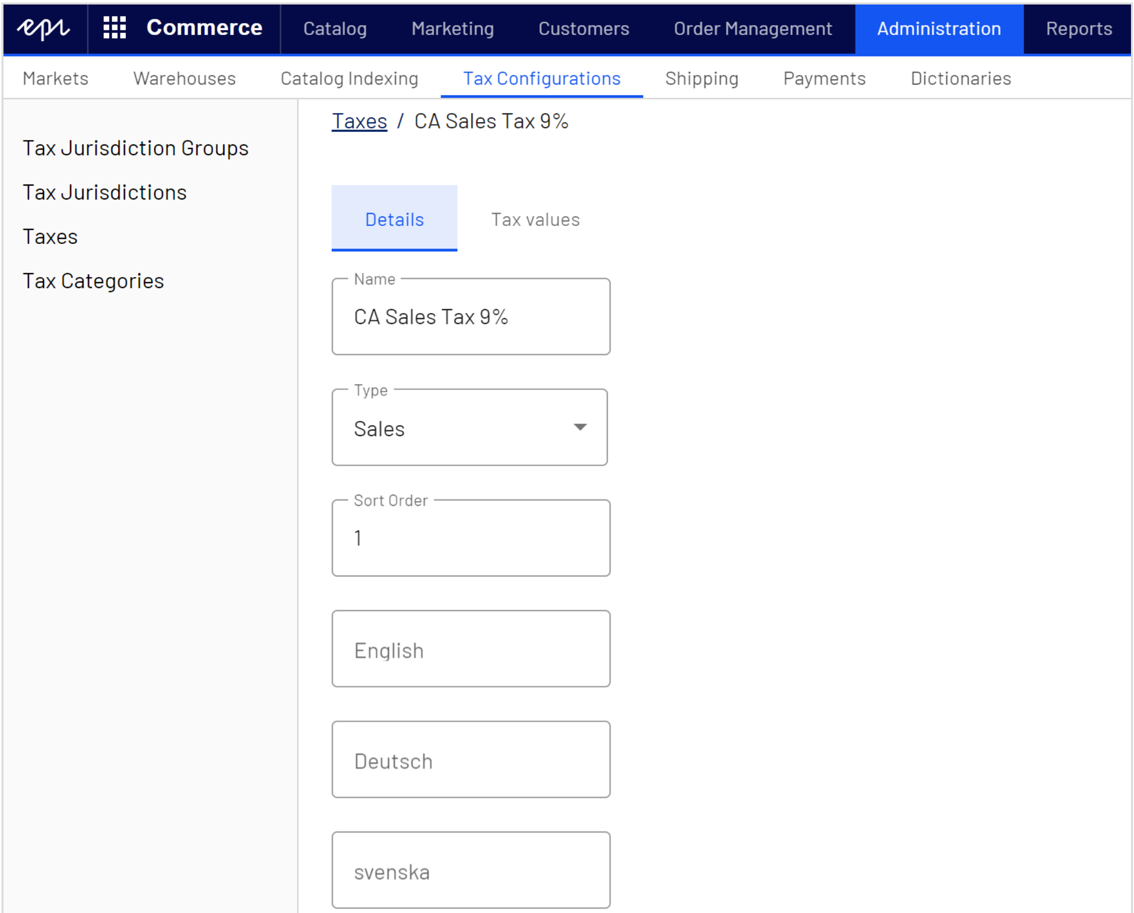
> **Note: Country Code** and **Region Code** entered here must match the codes used when defining countries and regions.

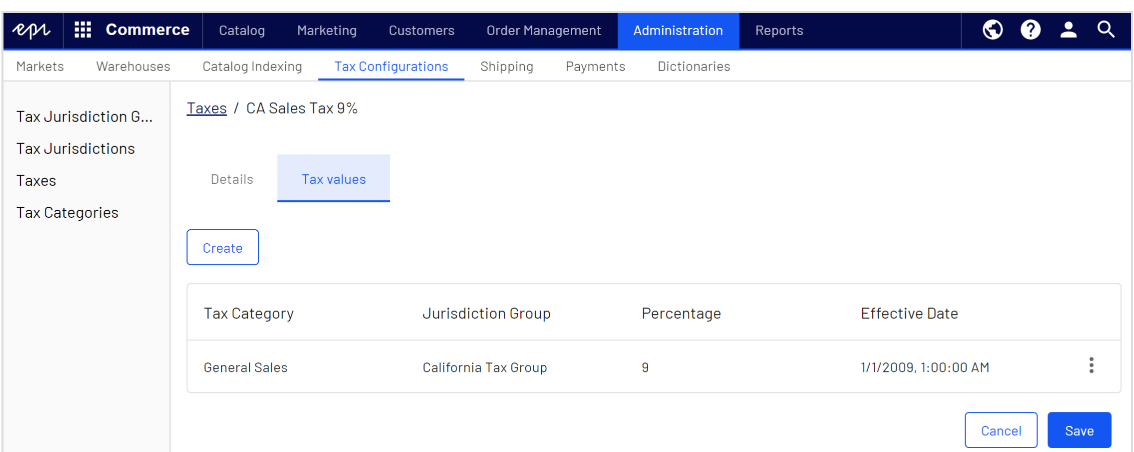
3. **Create and configure tax jurisdiction groups.**
   Select **Tax Jurisdiction Groups** to define groups of available tax jurisdictions. You can include multiple tax jurisdictions in a tax jurisdiction group.



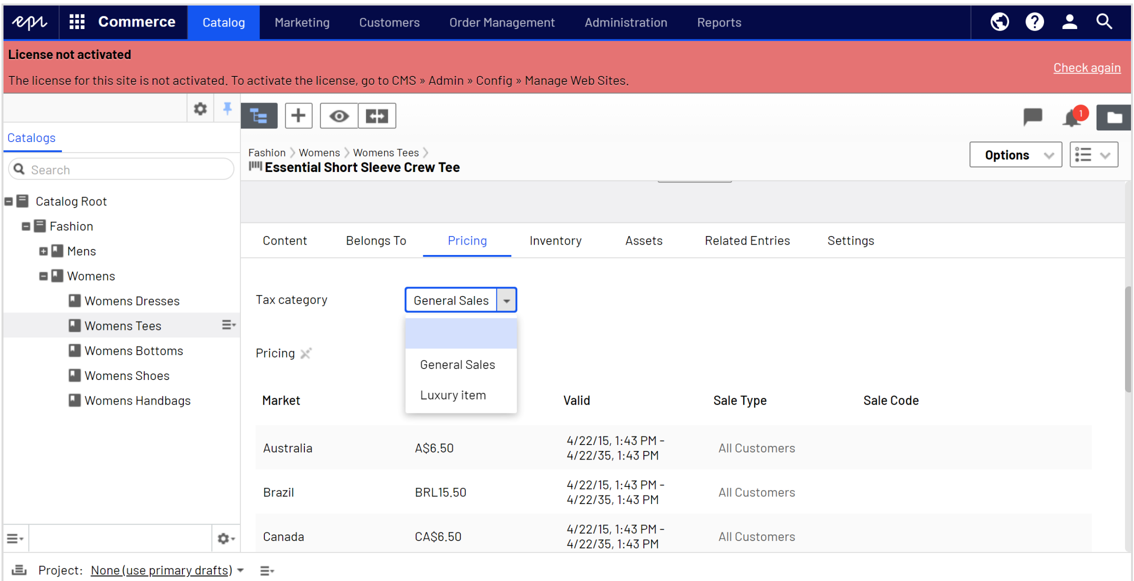
4. **Create and configure taxes.**
   Select **Taxes** and click **Create** to add a new one. Name the tax under **Details**. Under **Tax values**, specify the tax rate, and associate it with a tax category and jurisdiction

group previously created.





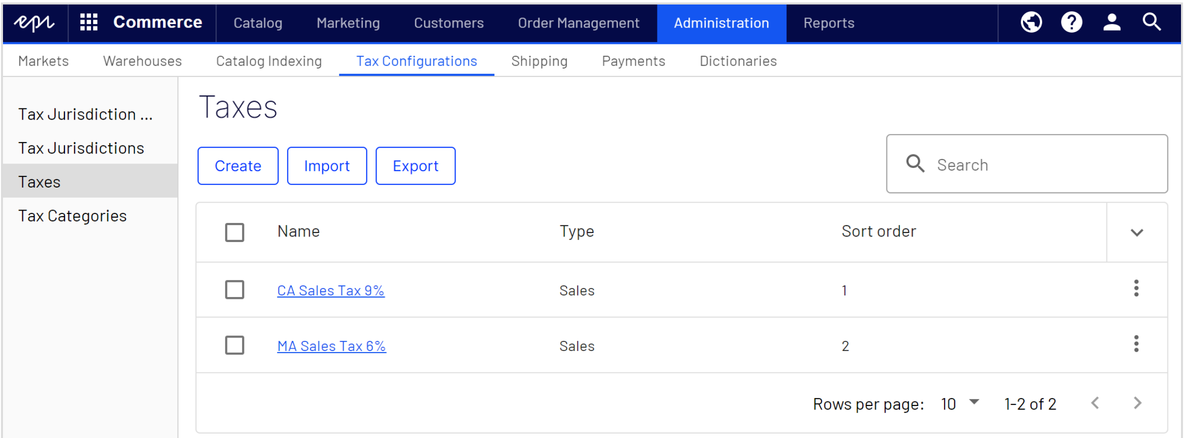
5. Tax categories created here are available for selection under the **Pricing** tab for variations/SKUs in a catalog.



Configuring taxes through import/export

Using a CSV tax file with a specified format (see example scenarios), you can import and update tax data in bulk, replacing manual configuration steps. You can also use the CSV import to associate catalogs with tax categories.

Using a CSV tax file, you can also extract selected tax data from Commerce to export and copy tax data among sites. The format of the CSV export file matches the CSV file used for importing taxes.



Importing taxes

> **Prerequisite:** A CSV tax file.

1. In the **Tax Configuration** view, select **Taxes** and click **Import**.
2. Click **Add New File** and **Browse** to select and upload your CSV tax file.
3. Click **Upload File** and then **Save The File**. The CSV tax file appears in the **Files Available for Import** section.
4. Select and highlight the CSV file and click **Start Import**.
5. When the import is completed, the tax setup is available in Commerce.

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 Commerce. You can delete all the tax data and perform the CSV tax import from scratch.

Exporting taxes

1. In the **Tax Configuration** view, select **Taxes** and click **Export**.
2. Select the tax value that you want to export.
3. Click **Start Export**.
4. When the export is completed, the CSV file is available 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.

Shipping

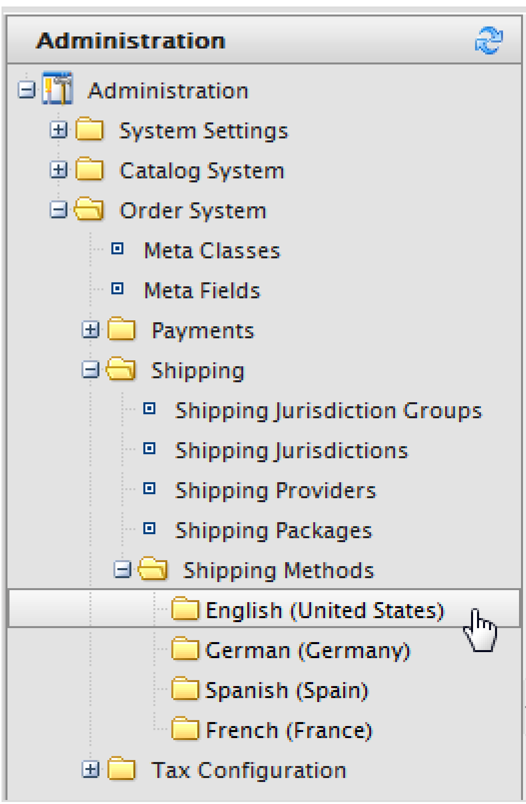
> **Note:** This topic is intended for administrators and developers with administration access rights in Optimizely.

Shipping is the physical delivery of product to e-commerce customers. Just as for payments, you can set up shipping methods and providers. Optimizely Commerce provides the following built-in 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**.

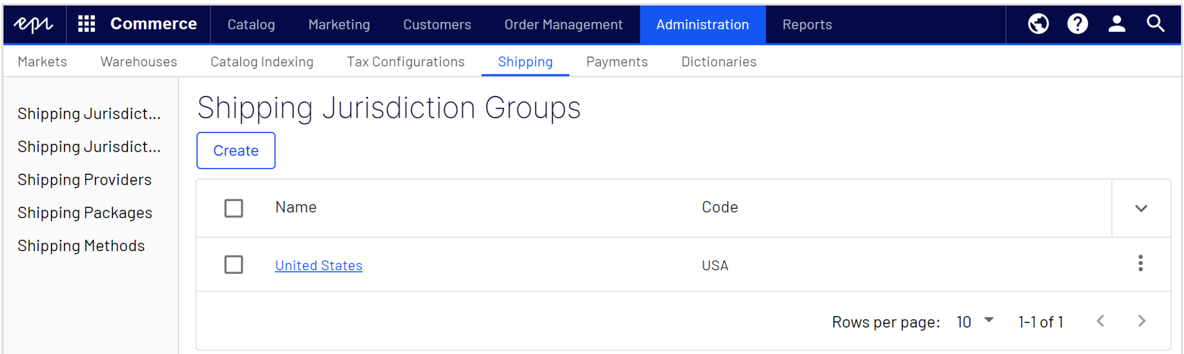


Shipping is the physical delivery of product to e-commerce customers. Just as for payments, you can set up shipping methods and providers. Optimizely Commerce provides the following built-in shipping gateways:

- **Generic Gateway** (fixed shipping rate)
- **Weight/Jurisdiction** Gateway (base price + additional fee that is calculated based on the weight and shipping location)

A developer can also create customized shipping gateways, see Optimizely World for technical details.

Open the **Administration** view and select **Shipping** to work with shipping functionality.



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.

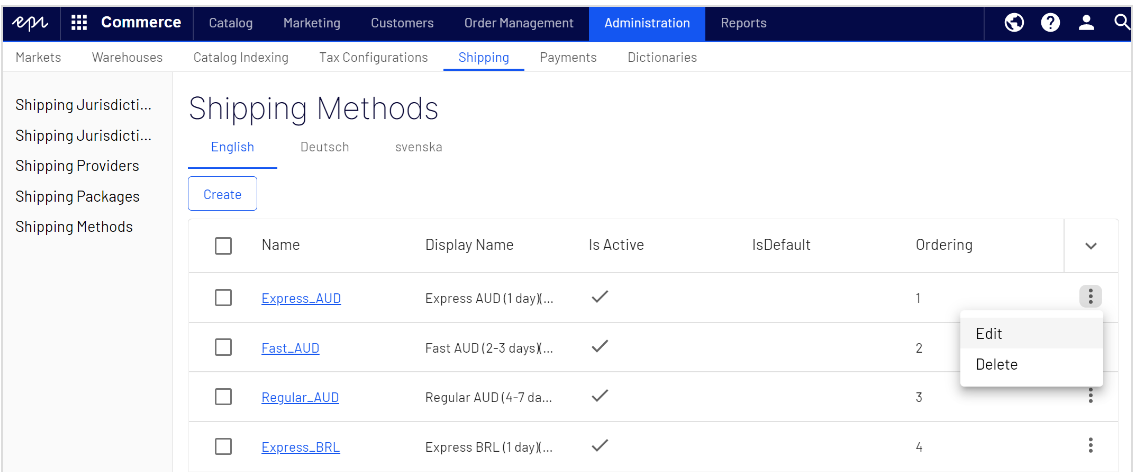
A shipping method is mapped to a shipping provider that is visible to an administrator in Commerce. This mapping lets the public site display a friendly name to the customer, such as *Ground Shipping*, while connecting the method to a provider, such as *UPS*.

Optimizely Commerce provides the following built-in shipping methods.

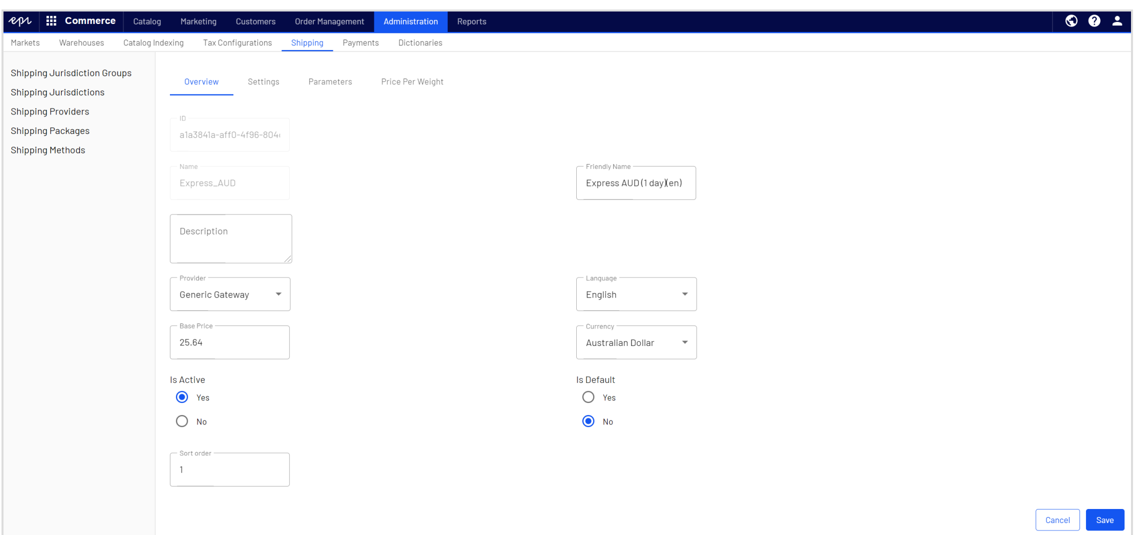
- Ground Shipping
- Fixed Shipping

Creating and editing a shipping method

1. In the **Administration** view, select **Shipping** and **Shipping Methods**.
2. Click **Create** to add a new shipping method, or select **Edit** in the context menu to modify an existing one.

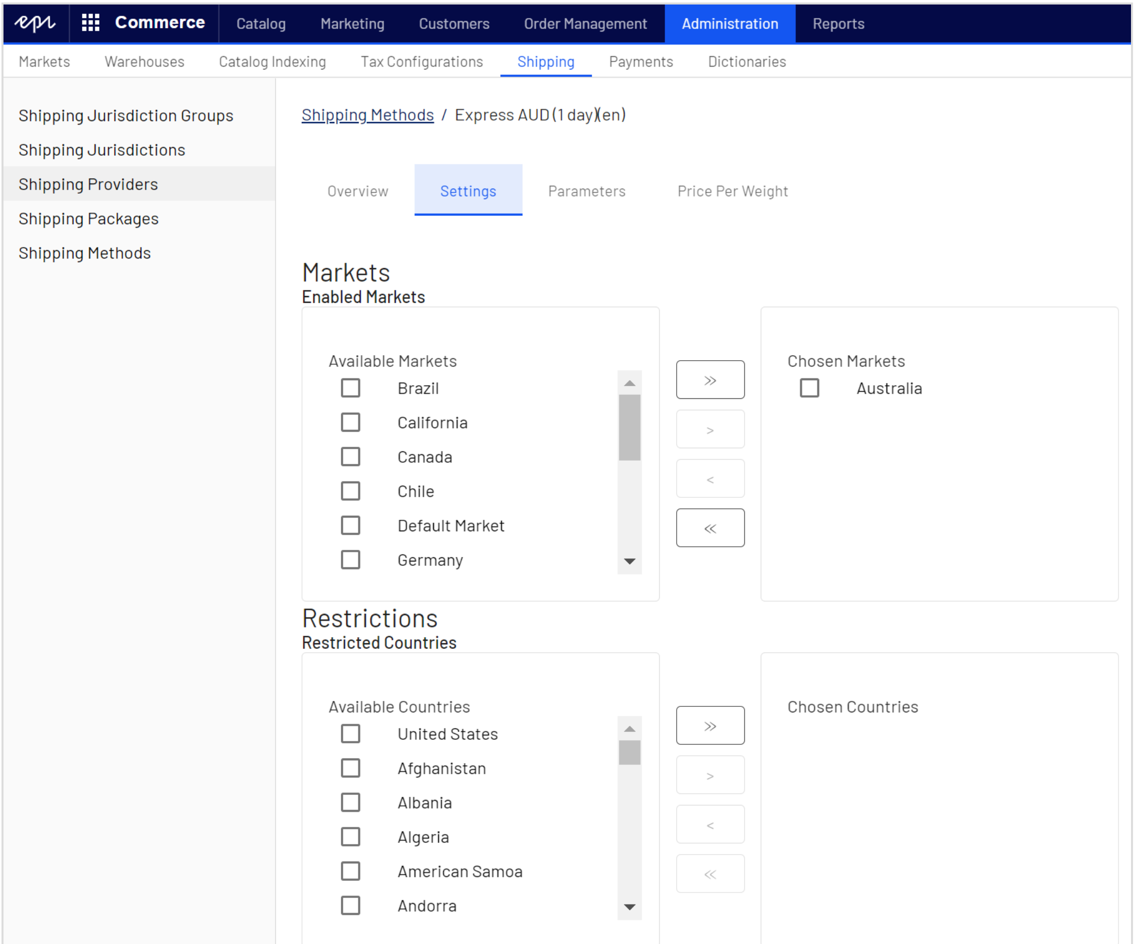


3. Enter values in the **Overview** tab as described in the following. Click **Save** when done.

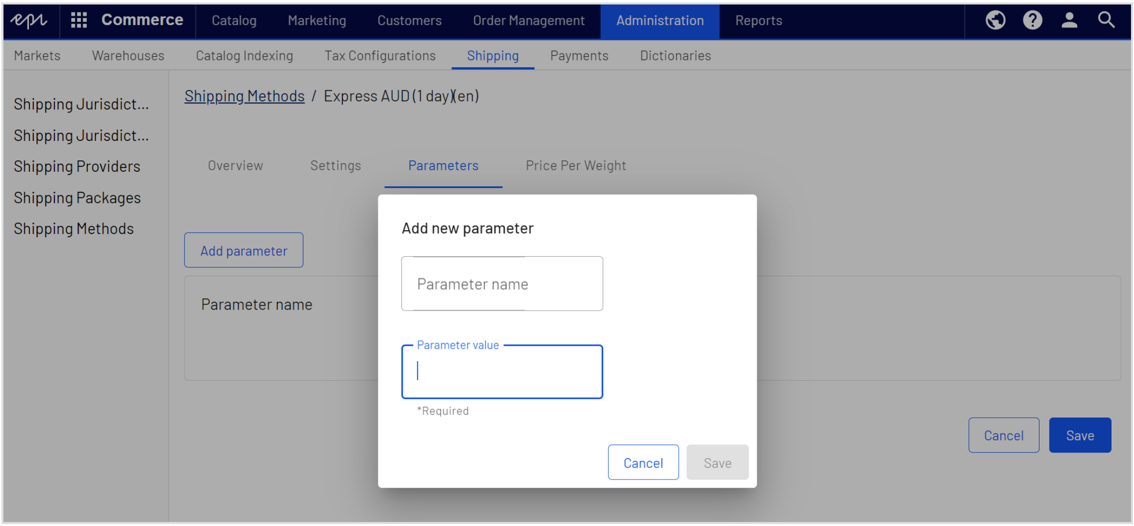


- **ID**. Automatically generated after saving the new shipping method.
- **Name**. Enter a name without spaces or special characters. The name is not displayed in the public site. Optimizely Commerce users see the name when working with shipping methods.
- **Friendly Name**. Enter a friendly name, which 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.

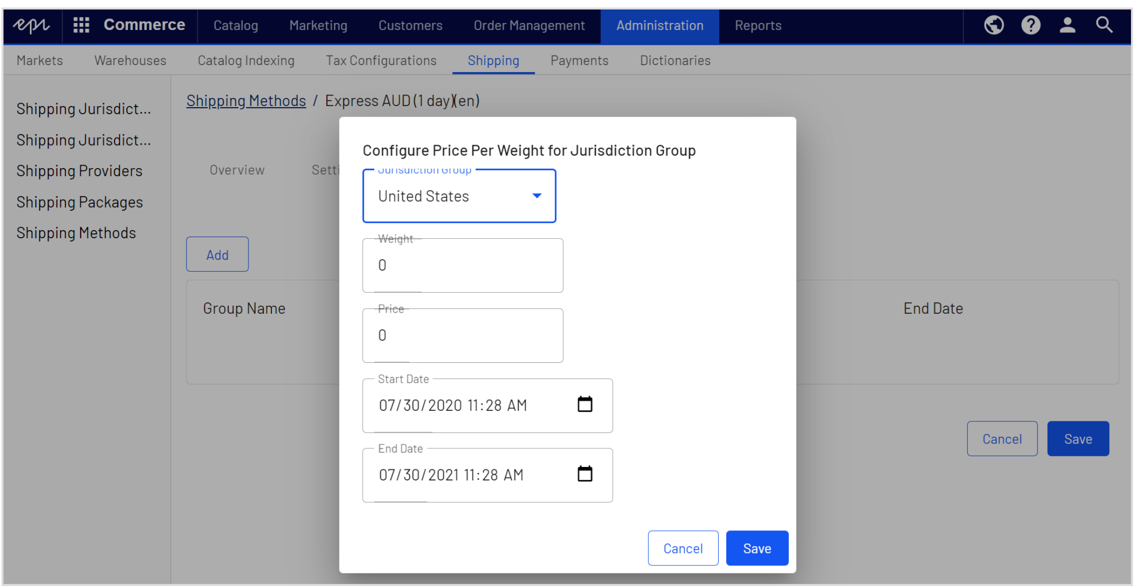
4. Select **Settings** and enter values to exclude markets, countries, regions, and payments from a shipping method. Click **Save** when done.



5. Select **Parameters** to set conditions for the shipping fee. This option only appears if you select the **Weight/Jurisdiction Gateway** in the **Provider** field in the **Overview** tab. Click **Save** when done.



6. Select **Price Per Weight** to select a jurisdiction group to apply the current shipping method. Click **Save** when done.



- **Jurisdiction Group**. Select a jurisdiction group to apply the current shipping method (for example, *United States*. These options are defined under **Shipping Jurisdictions** and **Shipping Jurisdiction Groups.**

- **Weight**. Enter a numerical value for the weight. Weight units are defined in code, see Optimizely World for technical details.
- **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.

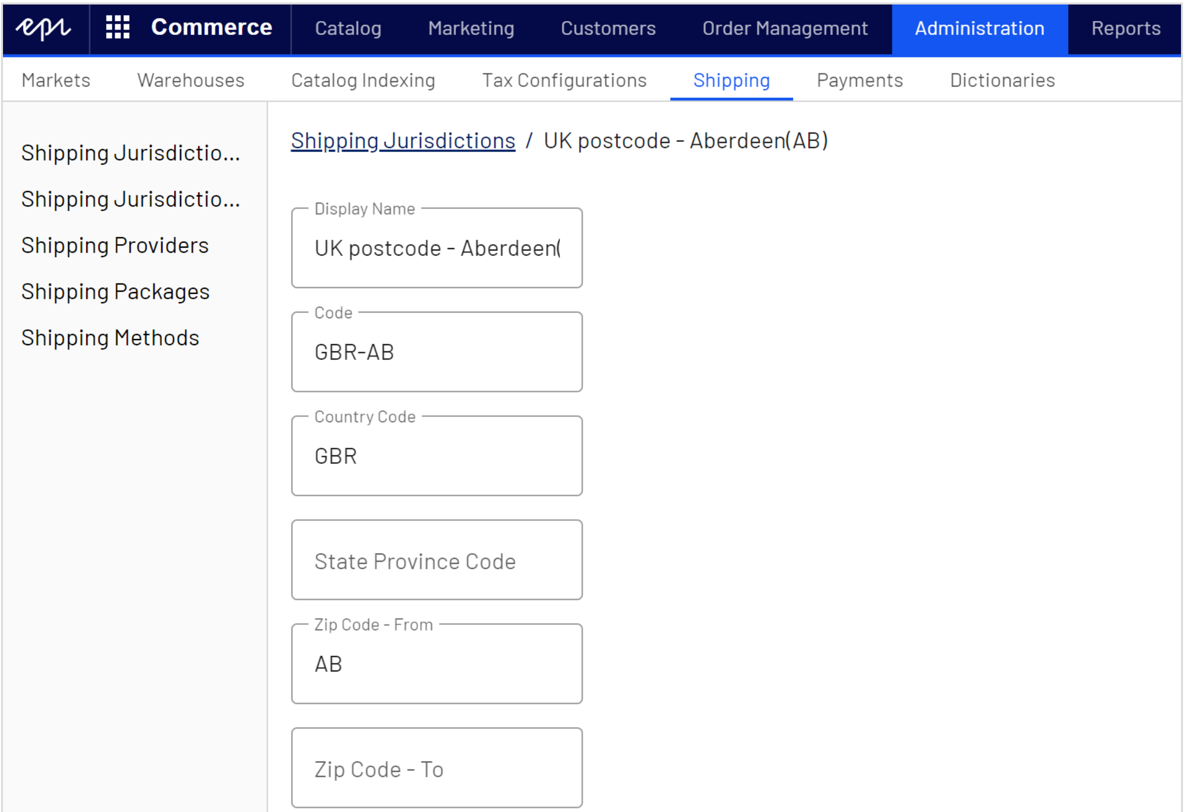
Deleting shipping methods

In the **Shipping Methods** overview, select **Delete** in the context menu for the shipping method you want to delete. Click **OK** to confirm.

Shipping jurisdictions

Shipping jurisdictions and jurisdiction groups are used for configuring specific jurisdictions to apply for shipping, for example country codes and zip codes, used when setting up shipping methods. Shipping jurisdictions are set up and used in a similar fashion as tax jurisdictions when configuring taxes.

Shipping jurisdictions are set up from the **Shipping** view by selecting **Shipping Jurisdictions** and **Shipping Jurisdiction Groups**.



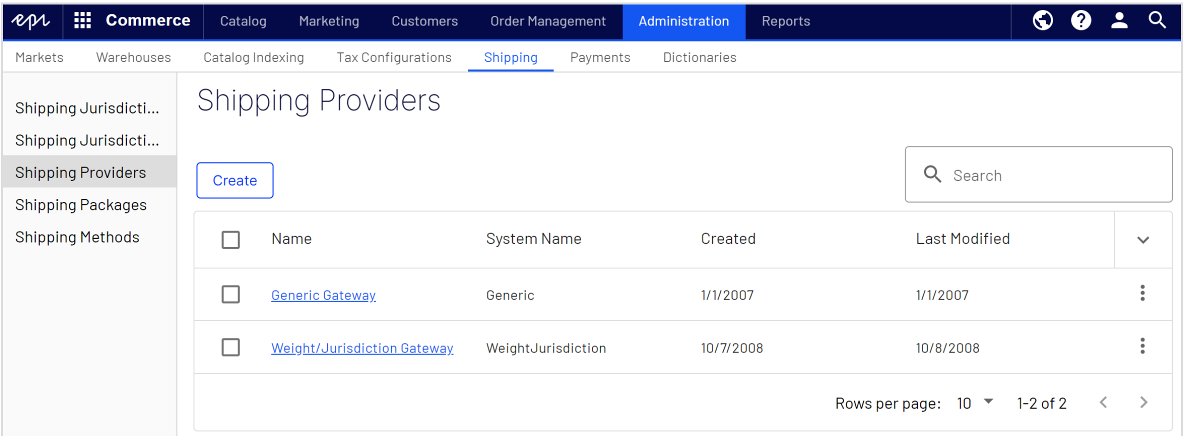
Shipping providers

> **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.

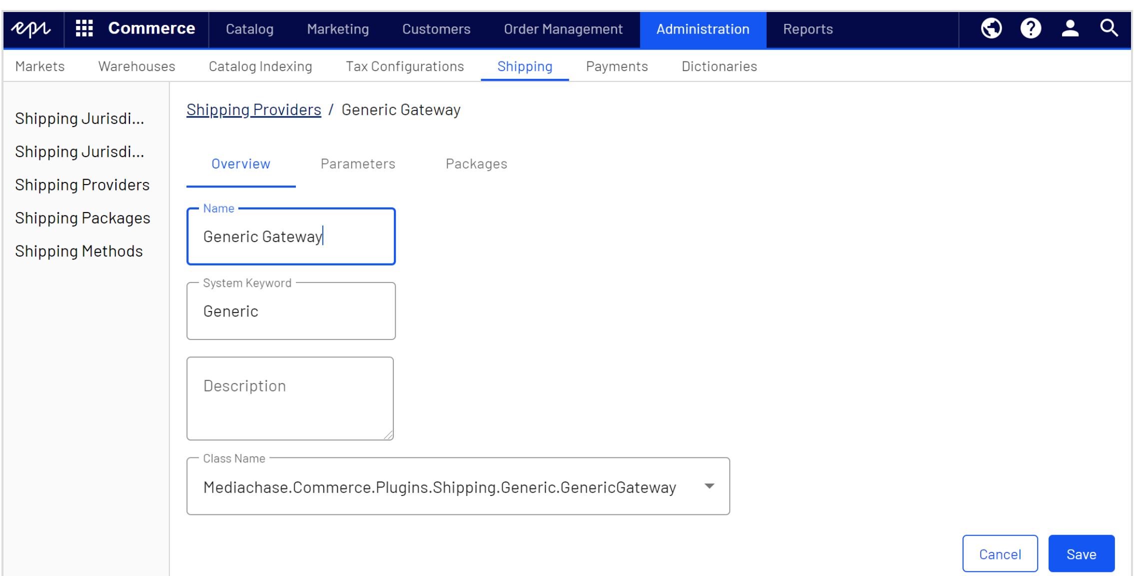
Shipping providers are managed from the **Administration** view under **Shipping**. See also Shipping Methods.

The shipping provider overview lists existing providers and their types.

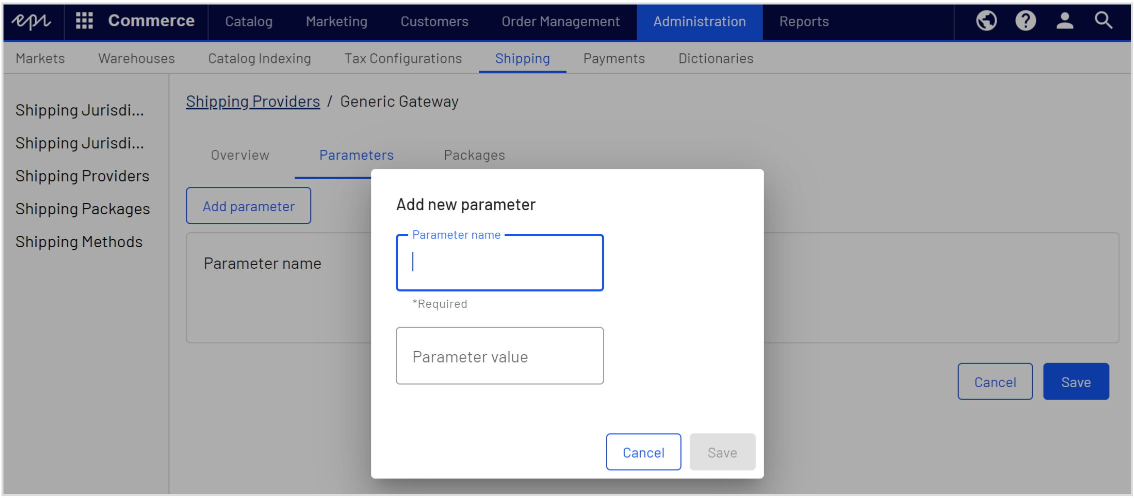


Creating and editing a shipping provider

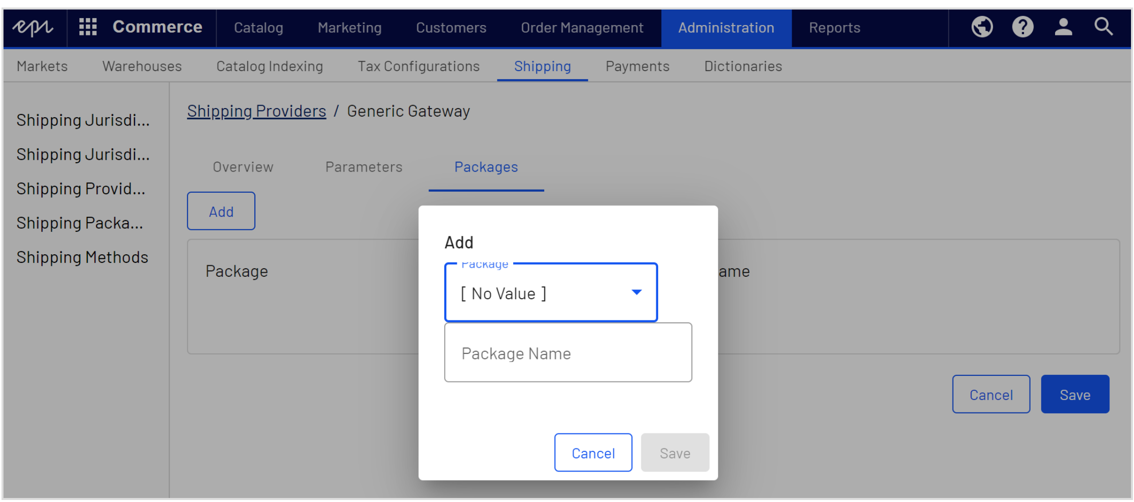
1. In the **Administration** view, select **Shipping** and **Shipping Providers**.
2. Click **Create** to add a new shipping provider, or select **Edit** in the context menu to modify an existing one.
3. Enter values in the **Overview** tab. **System Keyword (no spaces)** and **Class Name** are provided through code, see Optimizely World for technical details. Click **Save** when done.



4. Enter values in the **Parameters** tab, click **Save** when done.



5. Enter values in the **Packages** tab, click **Save** when done.



Note: The **Parameters** and **Packages** tabs are partially implemented to let developers fully customize those features.

Deleting shipping providers

In the **Shipping Providers** overview, select **Delete** in the context menu for the shipping method you want to delete. Click **OK** to confirm.

Payments

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

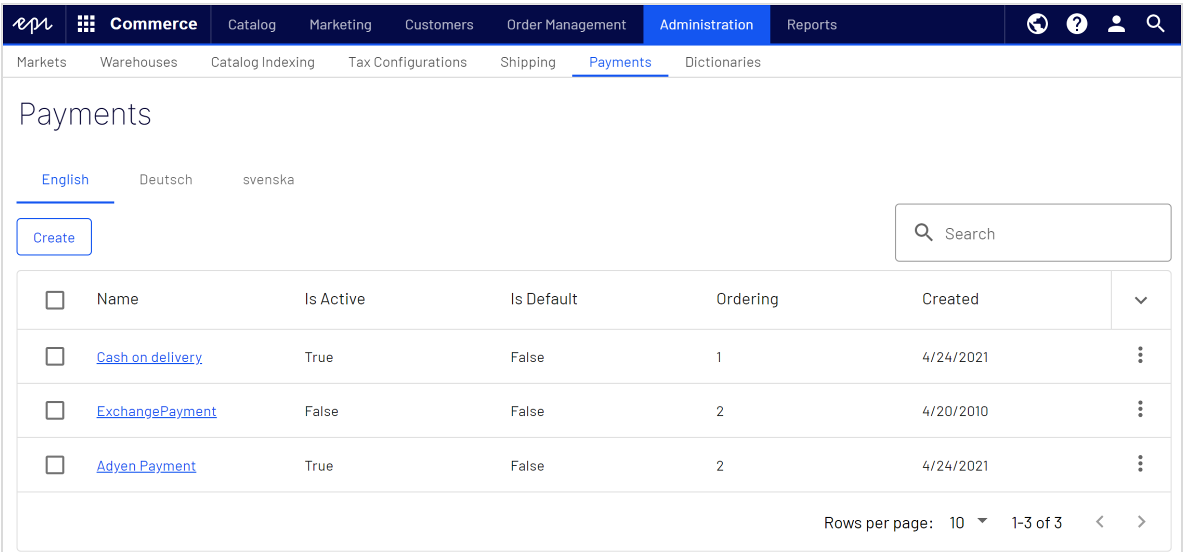
The components described in the following are needed to create a payment in Optimizely Commerce.

- **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 Commerceprovides the following payment types by default:
  - 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.

You can provide customers on the website with multiple payment options. Payment methods are typically specific to and customized for markets.

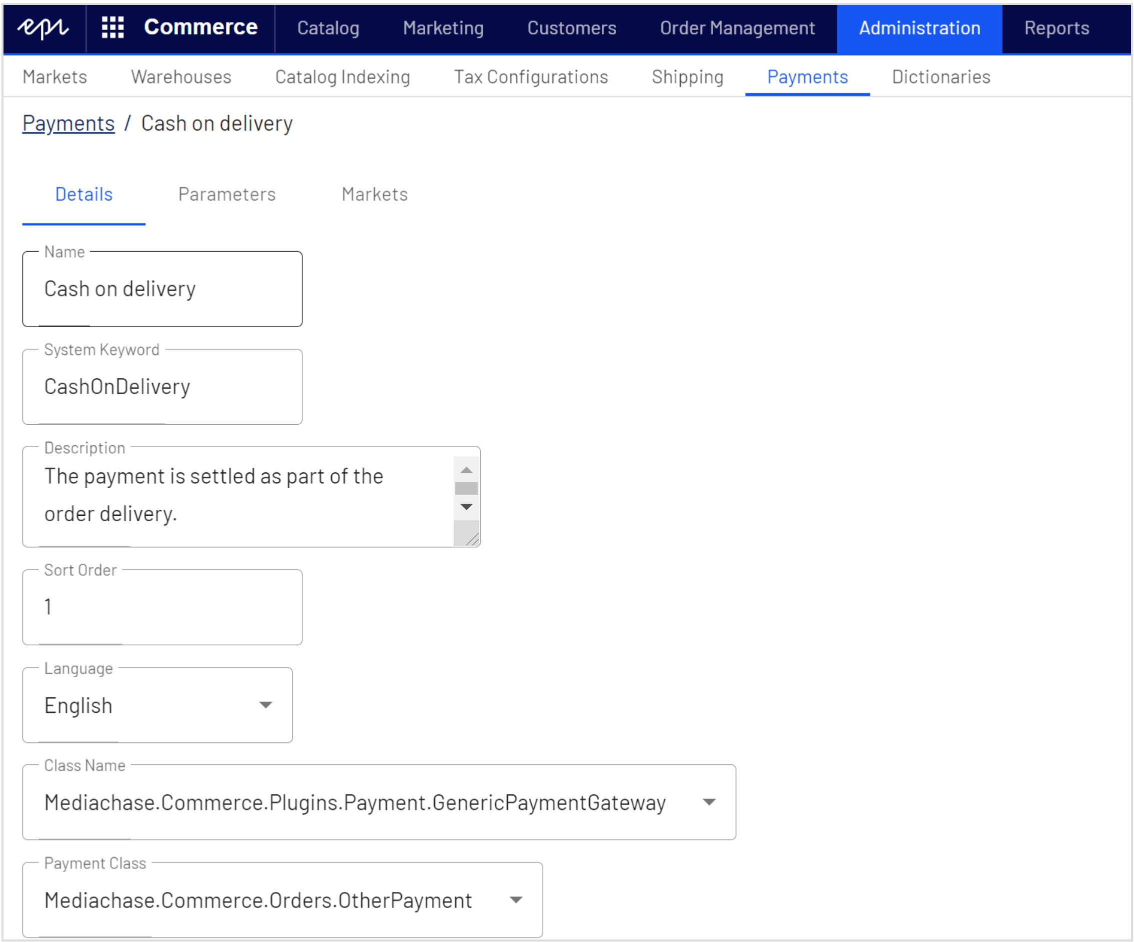
Open the **Administration** view and select **Payments** to work with payment functionality. The **Manage Payments** overview lists existing payments by language (a payment has to be assigned to a language that is valid for the website).

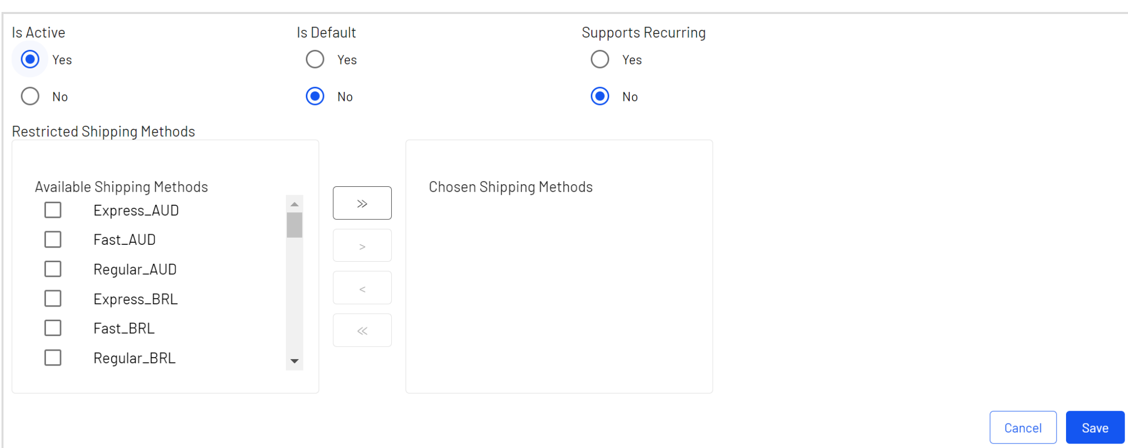


Creating and editing a payment

1. In the **Administration** view, select **Payments** and **Shipping Methods**.
2. Click **Create** to add a new payment, or select **Edit** in the context menu to modify an existing one.

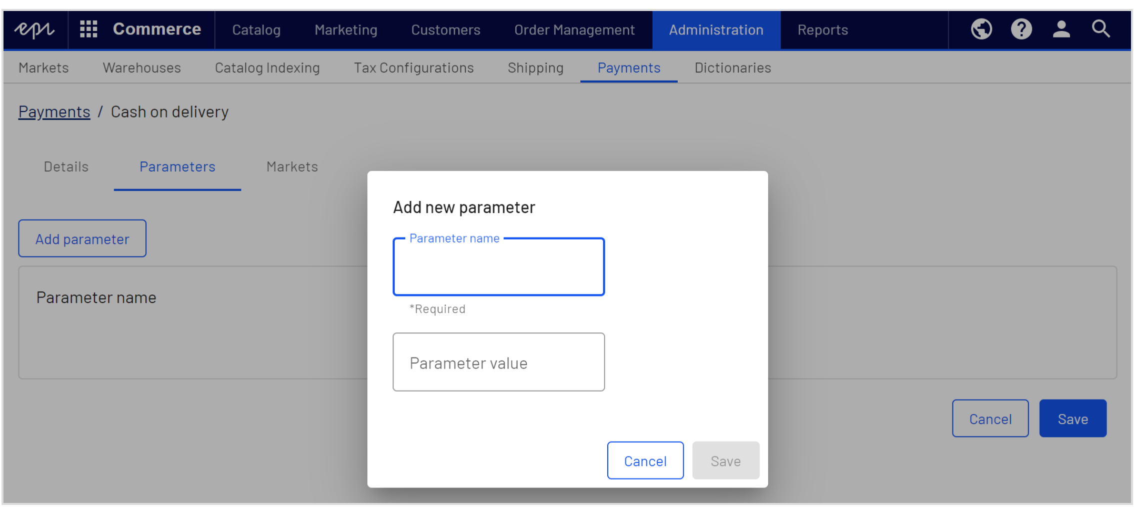
3. Enter values in the **Details** tab as described in the following. Click **Save** when done.



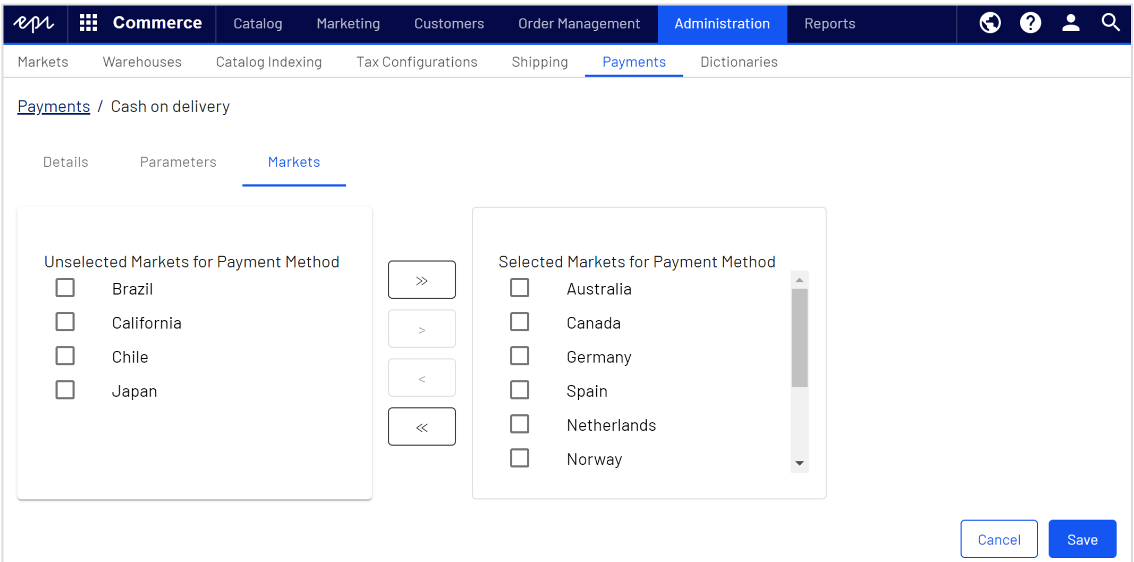


- **Name**. The payment name as displayed to the user.
- **System Keyword**. Enter a unique name for each instance of the gateway; new non-unique keywords do not save to the database. This keyword is not editable after a gateway is created.
- **Description**. A description displayed to the user.
- **Sort Order**. A number to order the payment method in the list of payment.
- **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.
- **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**. Select shipping methods for the payment.

4. Enter values for the **Parameters** tab, click **Save** when done.



5. On the **Markets** tab, select the markets (must be defined first to be available for selection) where the payment method will be available. Click **Save** when done.

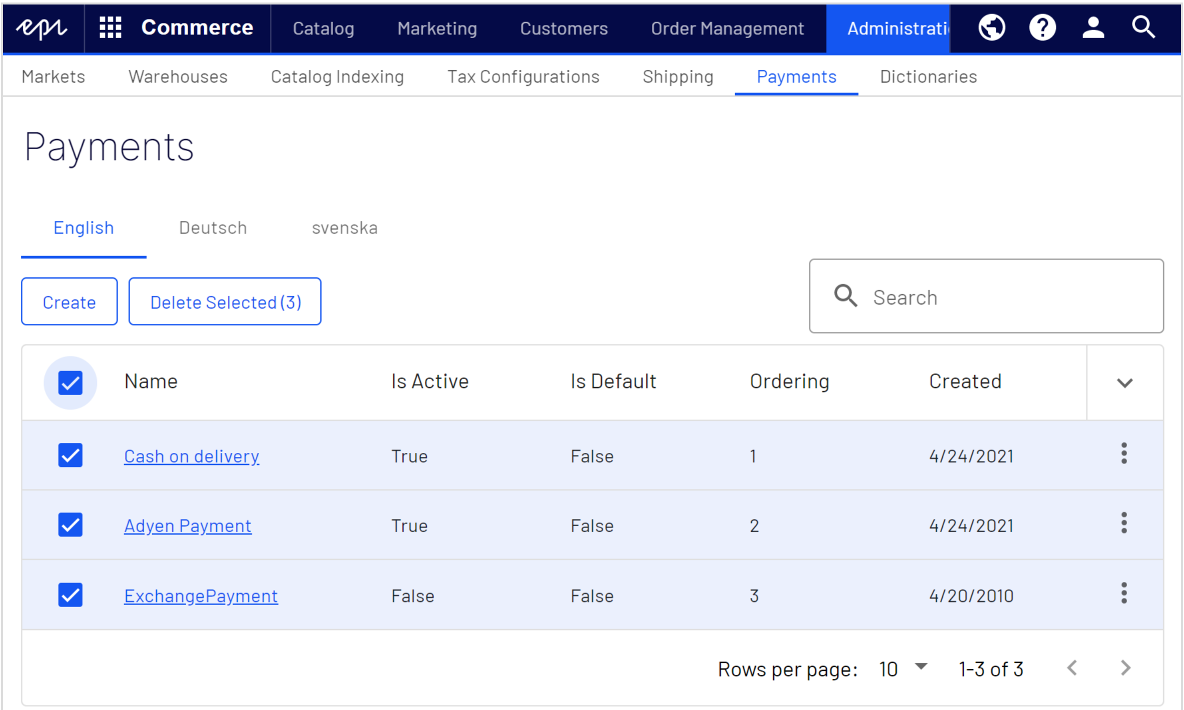


> **Note:** For a payment to appear in the list of available payments, it has to be **all** of: (1) assigned to the market, (2) assigned to a language that is valid for the market, **and** (3) assigned to a language that is valid for the site.

Deleting payment methods

In the **Payment** overview, select **Delete** in the context menu for the payment you want to delete. Click **OK** to confirm.

To delete multiple payments at once, select the payments you want to delete, click **Delete Selected**, and click **OK** to confirm.



Dictionaries

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

Using dictionaries and dictionary values you can enrich data in Optimizely Commercewhen working for example with currencies, countries, customer organizations, customer contact groups, and catalog content. Some default values are auto-installed and can be changed through code, see Optimizely World for technical details.

Working with dictionary property values

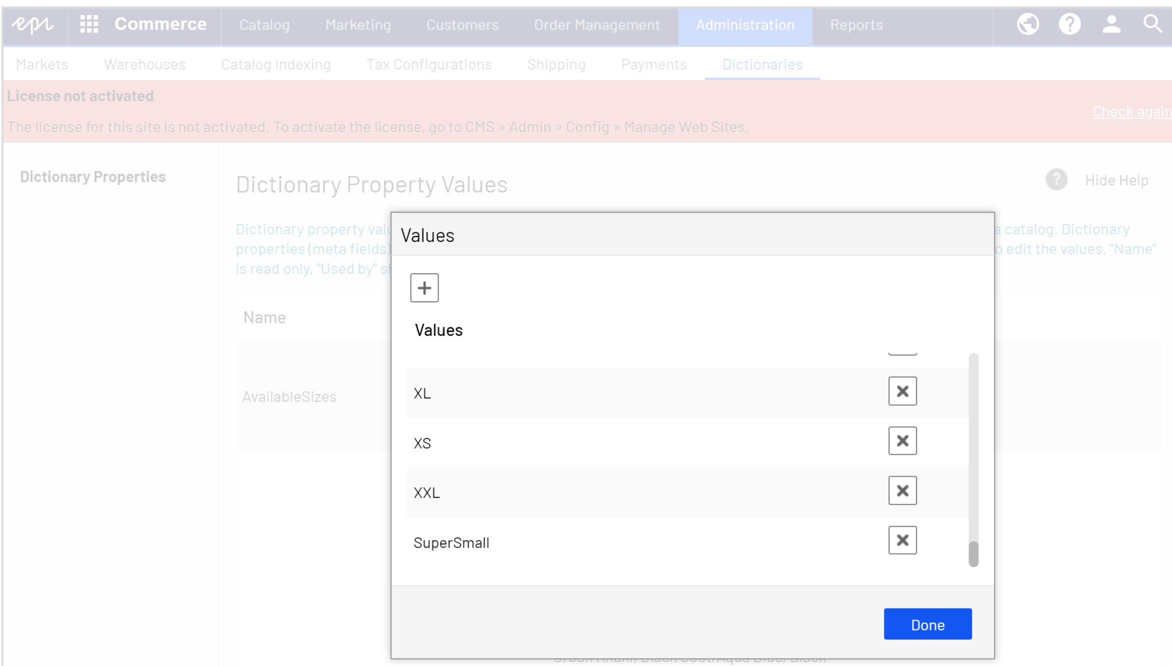
Dictionary property values are used for extending data, for example "fabric" for fashion items or "flavor" for wines in a catalog. From the **Administration** view you can work with dictionary property values for catalog content.

The dictionary properties (meta fields) are added through code, from the **Administration** view you can only add and delete values.

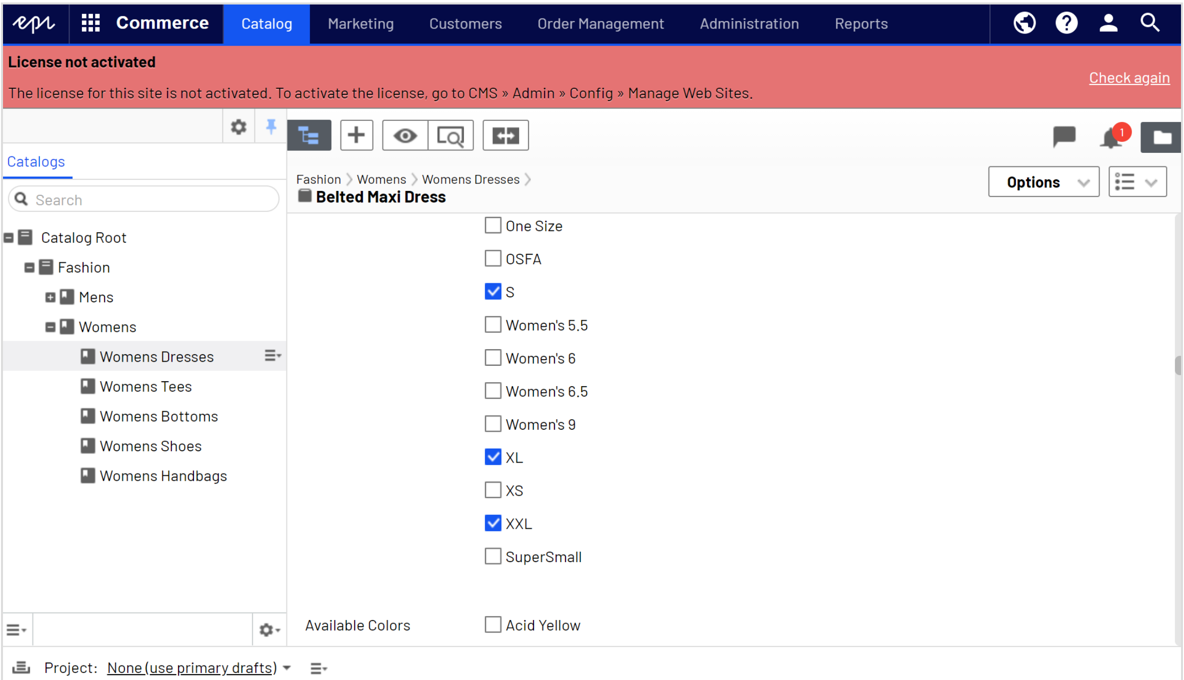
Adding a dictionary property value

In the **Administration** view, select **Dictionaries**. Click a row to edit the values, **Name** is read only, **Used by** shows where the property is being used.

The following example shows how values for "sizes" are added from the **Administration** view.



When added, the "size" values become available for selection in the catalog view when working with catalog content.

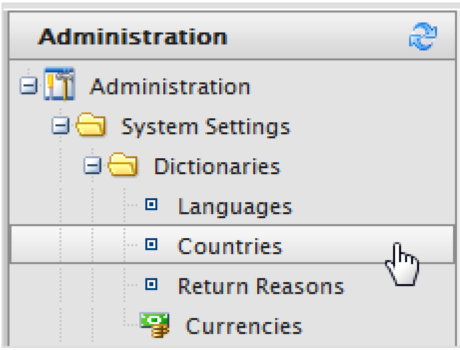


Adding a country to dictionaries

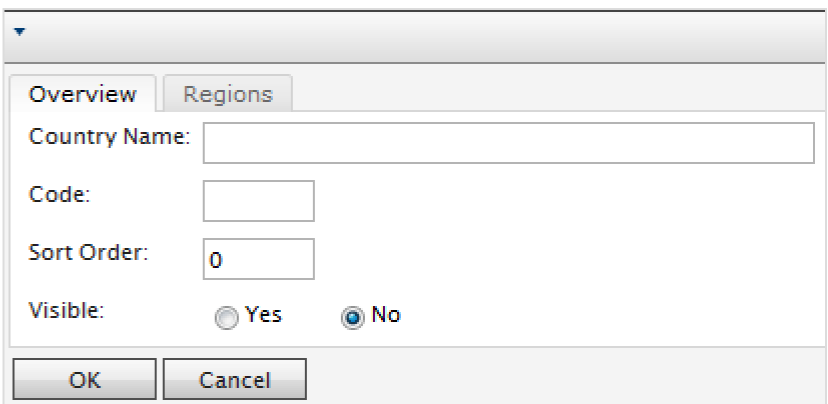
> **Note:** This topic is intended for administrators and developers with administration access rights in Optimizely.

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

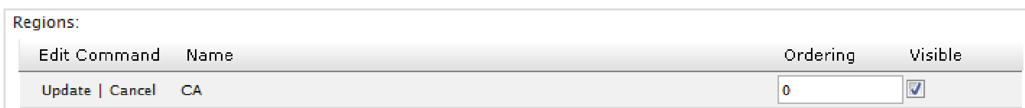


     - **Country Name**. Enter a name of the country.
     - **Code**. Enter the country code, which you can get from the MSDN site Table of Country/Region and State/Province Names and Codes [C++] (use the ISO Short Code or ISO Long Code as long as you remain consistent).
     - **Sort Order**. Enter a number 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

   - **New Region Name**. Enter a name, such as CA, to identify a state, province, or prefecture. Then click **Add**. You can also select whether the region name is **Visible** on the public site.

     When you click **Edit**, you can change the **Ordering** of the region. Click **Update** to save those changes.

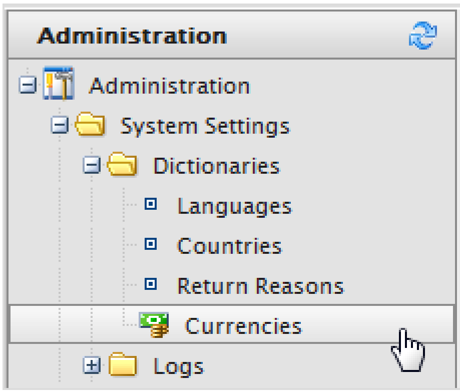


Adding a currency to dictionaries

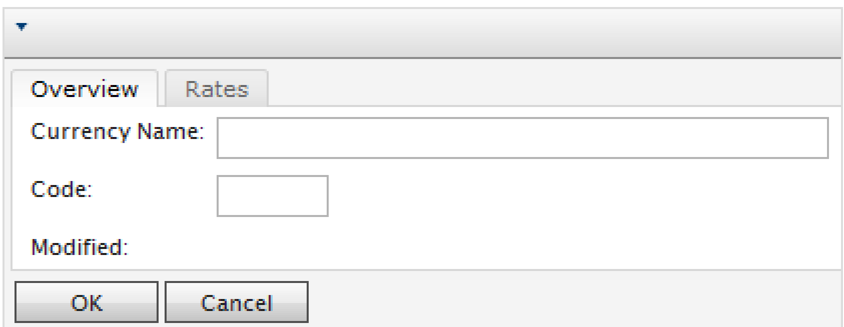
> **Note:** This topic is intended for administrators and developers with administration access rights in Optimizely.

A currency helps to define a market and for catalog.

1. Open Commerce Manager and go to **Administration** > **System Settings** > **Dictionaries** > **Currencies**.

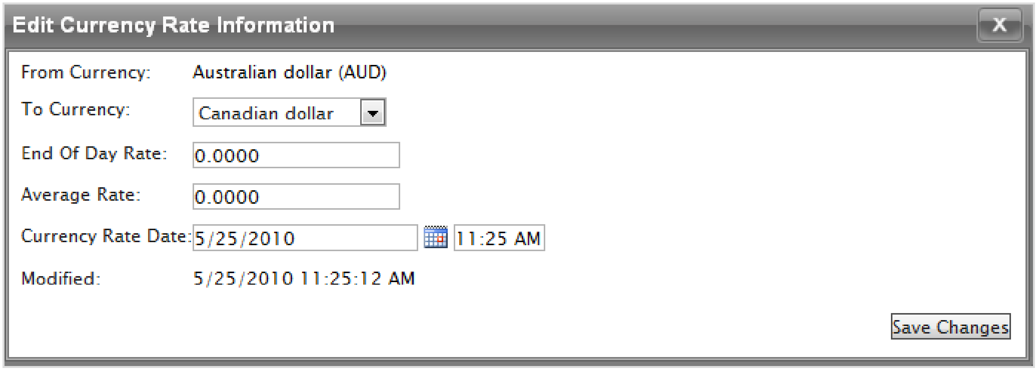


2. Click **New Currency**. The Currency **Overview** tab appears.



- **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.



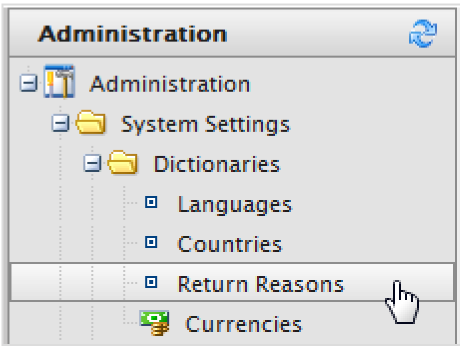
- **From Currency**. Displays the current currency.
- **To Currency**. Select the currency to which you want to convert from the current currency.
- **End of Date Rate**. Enter the end-of-day rate.
- **Average Rate**. Enter the average rate.
- **Currency Rate Date**. Enter a currency rate date.

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.

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 Worldfor 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.

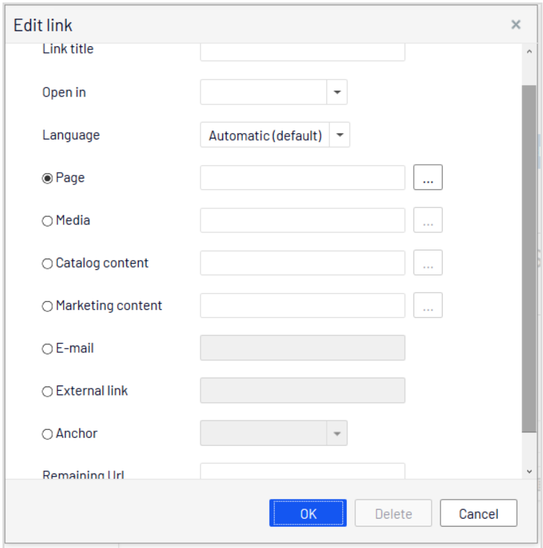
Different user groups update content. For example, merchandisers organize the product catalog, manage pricing and enrich the product information, whereas marketers and editors create campaign pages and promote products.

Catalog content

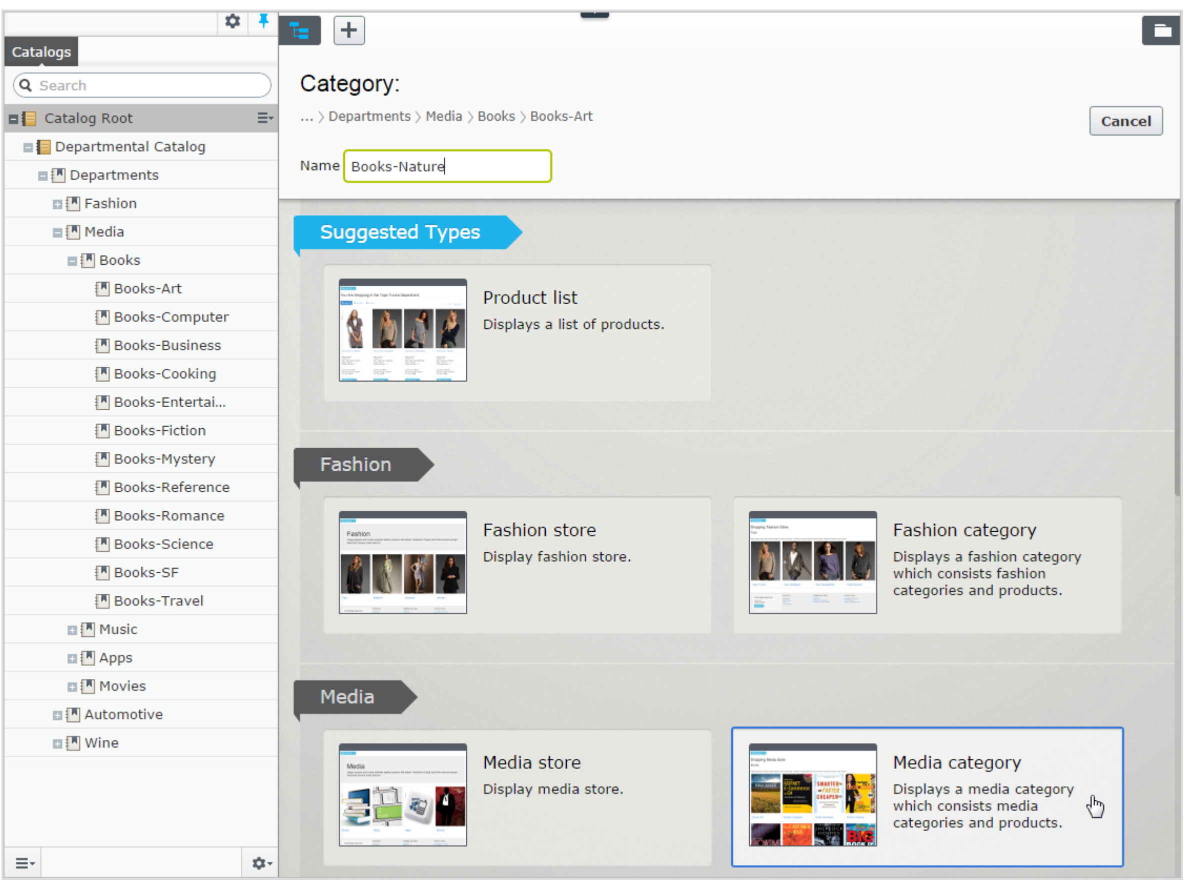
Catalog content consists of various types of catalog entries, such as categories, products, variants, package and bundles. The **Catalog** view lets you:

- 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.

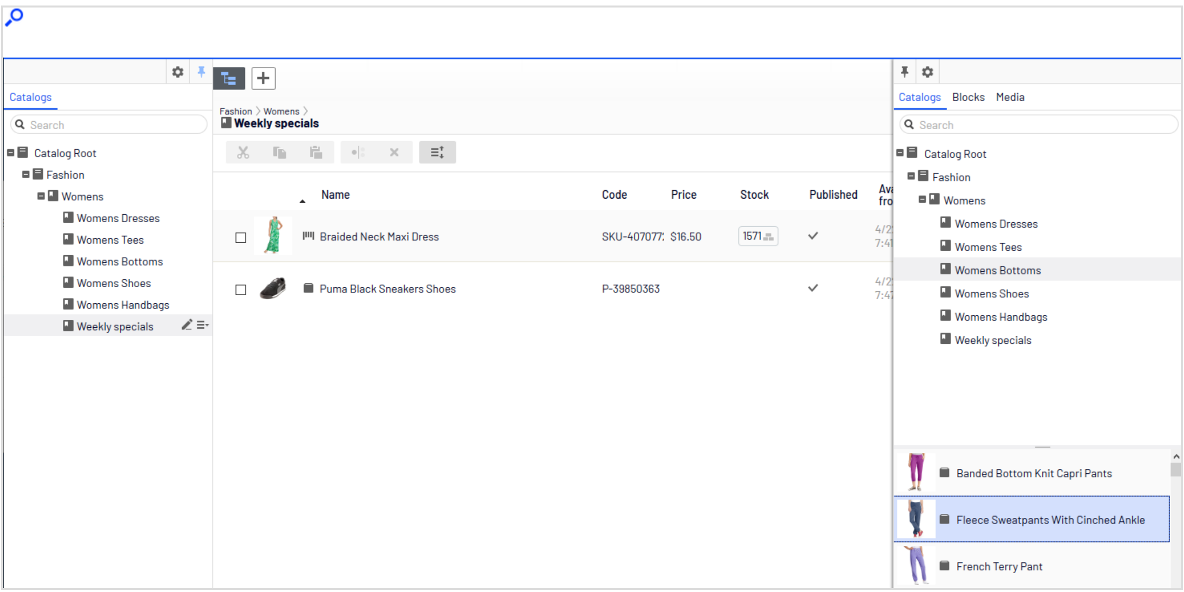


- Publish changes directly on the website, or schedule it for later publishing.



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.

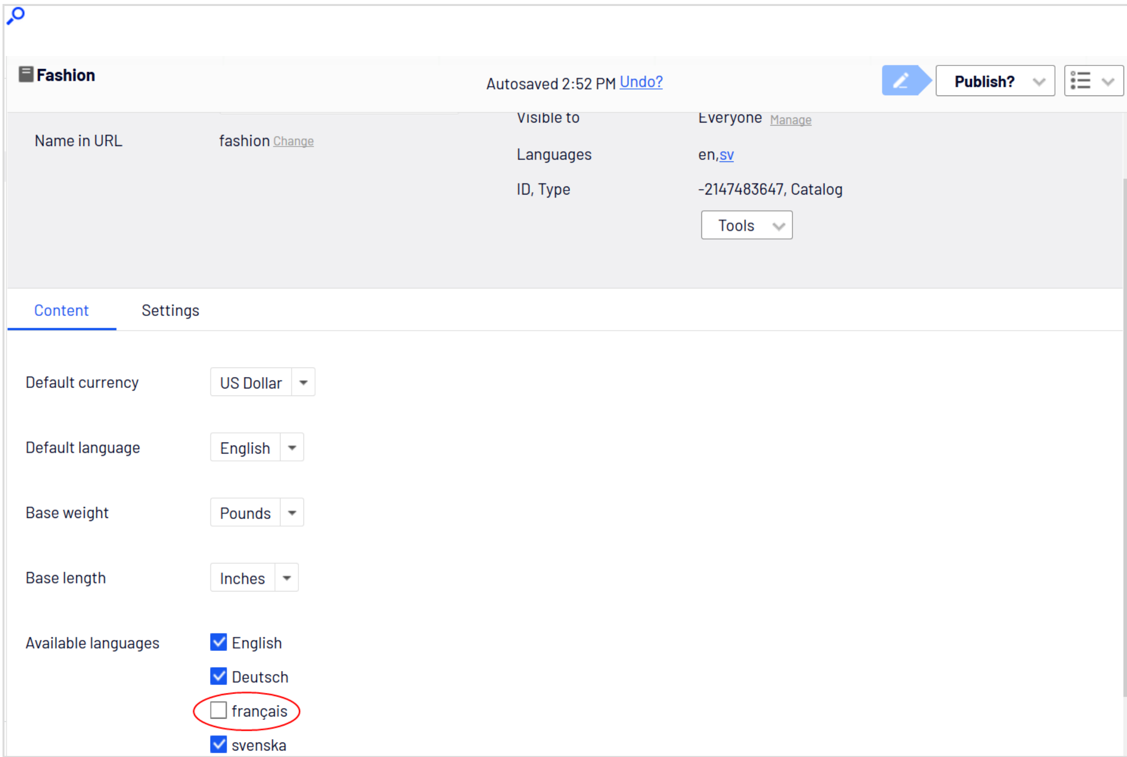
Translating catalog content is similar to translating CMS content, such as pages and blocks. Optimizely uses specific language settings for catalogs, markets, and payment and shipping methods in Optimizely Commerce.

Enabling a language for catalog content

1. Activate the language in the CMS admin and edit view, as described in Managing website languages.

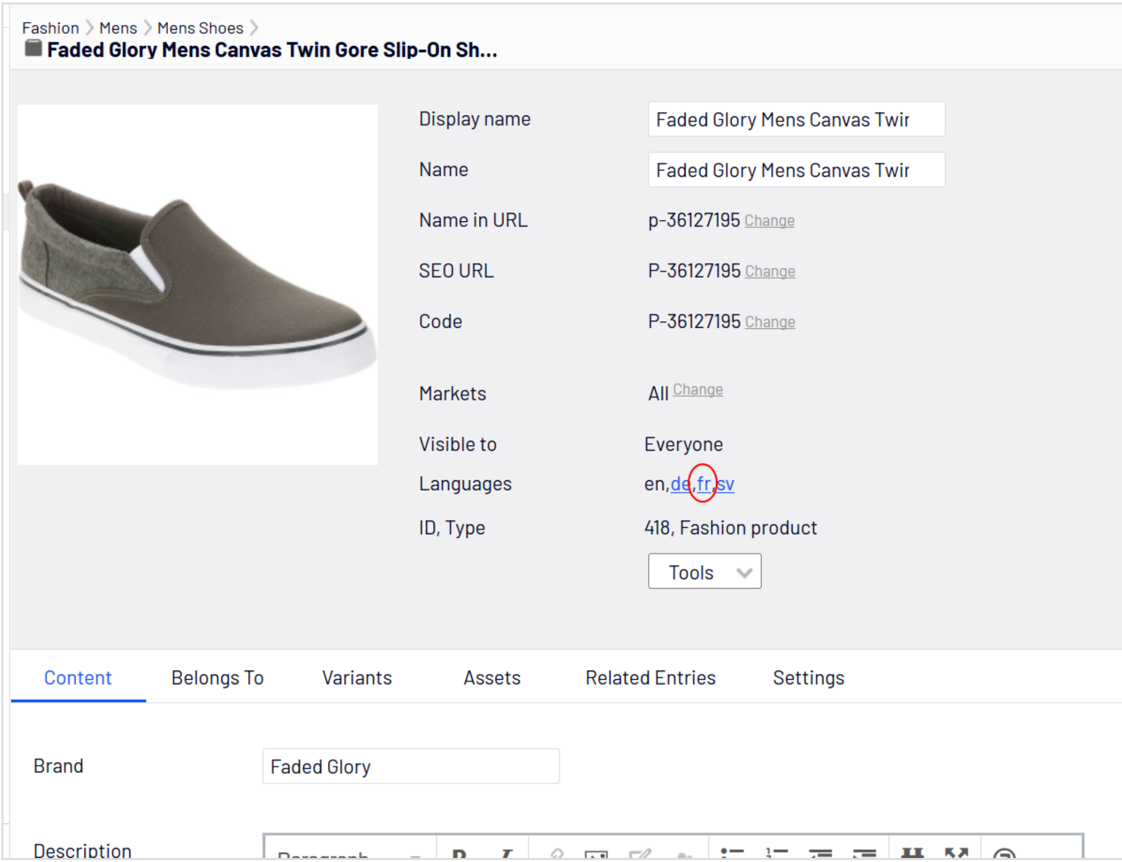
   > **Note:** Enable the language in edit view to make it available for editors to translate content, *and* to make the website's start page available in that language, for proper display of translated content.

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.



Translating content for catalog entries

1. In the **Catalog** view, select the desired catalog entry to translate in the catalog tree.
2. Click **Edit** in the context menu for the selected entry, or select the entry to open the **All Properties** editing view.
3. In the header next to **Languages**, select the desired language for translation. (Enabled languages are listed.).



4. Edit the available properties, and follow the content publishing flow to save and publish the translated catalog entry information.

> **Tip:** When you translate content, have the original content open in another browser window for comparison. You can also copy and paste the original content into the text area where you are working, as reference.

Switching language and viewing language versions

When editing translated content in the All properties editing view, you can switch languages by selecting the desired language in the **Header**. The user interface reloads, displaying the content in the selected language. See Translating content.

Editing global properties

Depending on your implementation, some properties may be globally shared and can only be edited in the master language. See Translating content.

Setting the user interface language

- To set the user interface language for **Catalogs** and **CMS**:
  1. Select your user profile name in the upper right corner.
  2. Click **My Settings** then the **Display Options** tab.
  3. Select the language of your choice and click **Save**.
- To set the user interface language for **Commerce Manager**:
  1. In the upper menu of Commerce Manager, click **Change Language**.
  2. Select the language.
  3. Click **OK**.

Commerce-specific visitor group 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 implementation and maintenance. A built-in user group created when Optimizely CMS is installed.
WebAdmins	• All editing and administration views in Optimizely CMS and Optimizely Commerce. • All parts of Commerce Manager except Administration.	Usually restricted to very few users. A built-in user group created when Optimizely CMS is installed.
WebEditors	The ability to edit Optimizely Commerce content. Required for all users (if not members of WebAdmins or Administrators).	Catalog editors need additional editing access rights in the catalog page tree (see **Controlling access to catalogs and categories**). A built-in user group created when Optimizely CMS is installed.
Everyone	Derived from Windows, this group provides “anonymous” visitors with read access to content. All unregistered visitors to a public website are anonymous, meaning that they cannot be identified by the system.	A built-in user group created when 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.
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	• Creating returns and exchanges • Viewing and editing orders • Sending notifications • Processing payments and split shipments
Receiving Manager	• Viewing shipments • Receiving returns
Shipping Manager	Viewing, packing, and completing shipments.

To determine more granular access rights to Commerce Manager functions for any standard group, custom group, or individual users, use the permissions for functions screen. See **Customizing group access to functions**.

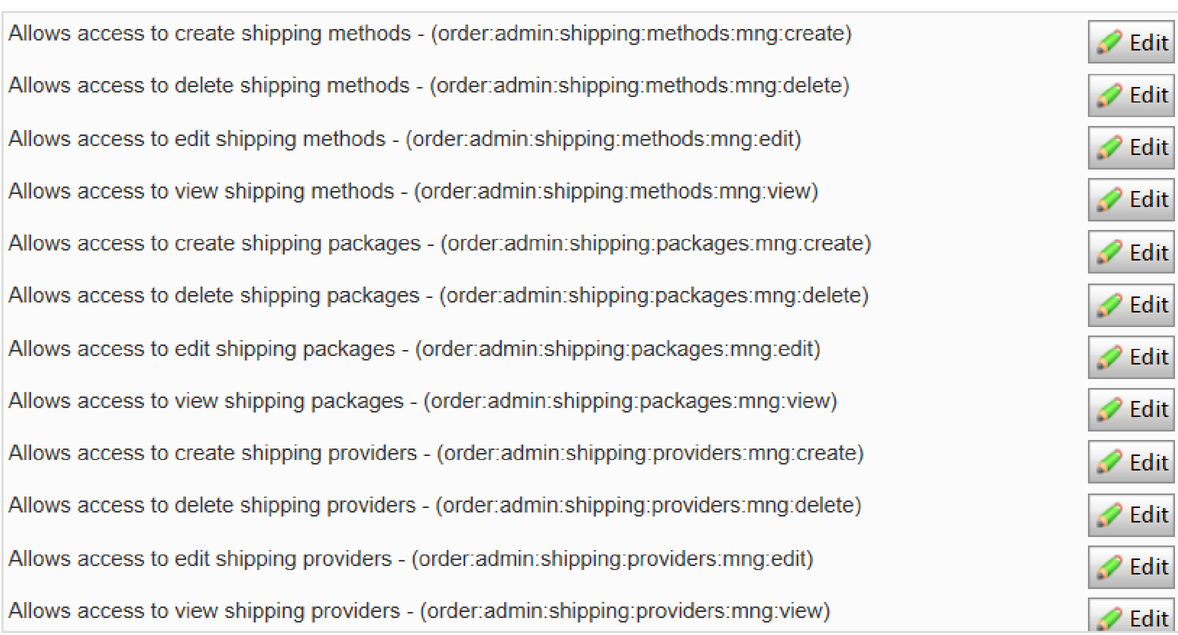
Customizing group access to functions

You can customize which groups and users can perform 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.



See Permission for functions in the CMS Administrator User Guide.

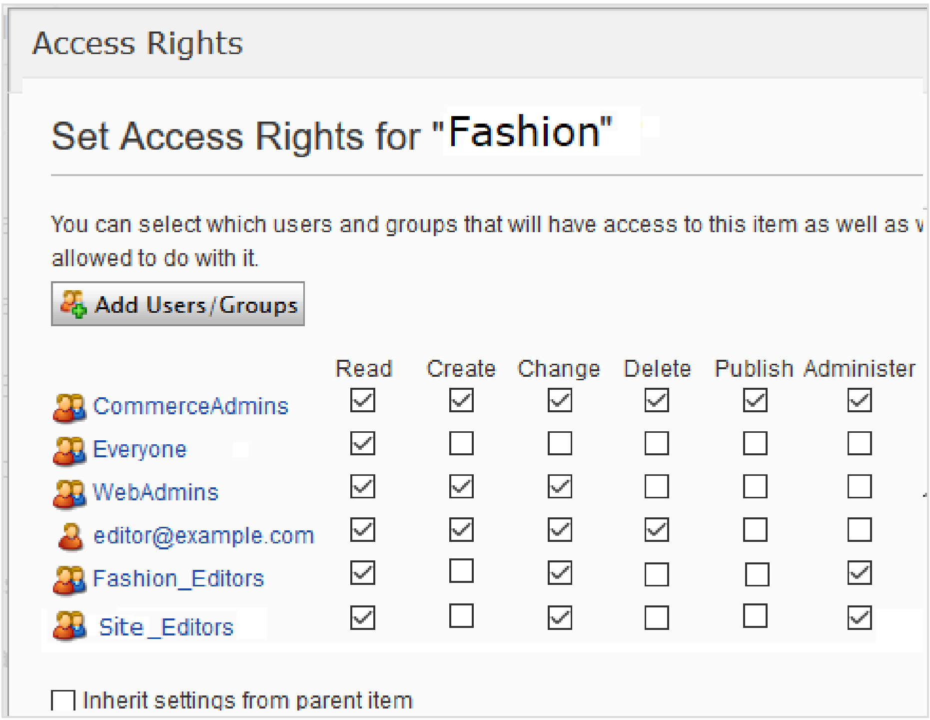
Controlling access to catalogs and categories

Members of user groups have default access rights to catalog content, as described in **Groups and access rights**. You can override these settings, and grant predefined groups and users access to individual catalogs and categories. You can also create custom groups then assign to their members the ability to perform various tasks on products in any category or catalog.

For example, a **Site_Editors** group has change permission for the entire catalog structure, while members of the **Fashion_Editors** group only have change permission for the Fashion catalog, and **Automotive_Editors** group members only have change permission for the Automotive catalog.

Note that you *cannot* set access rights for individual products. Products inherit permissions from their direct parents (but not "linked" parents).

> **Note:** Access rights set in the Catalog do not carry over to Commerce Manager (CM). So, users with CM access can still edit entries there despite the catalog settings. You can restrict access to CM through **Customizing group access to functions**. However, most users who edit catalogs cannot access CM.



To control access to catalogs or categories, follow these steps.

> **Prerequisite**: To work with catalog and categories, users must belong to the WebEditors and CatalogManagers user groups.

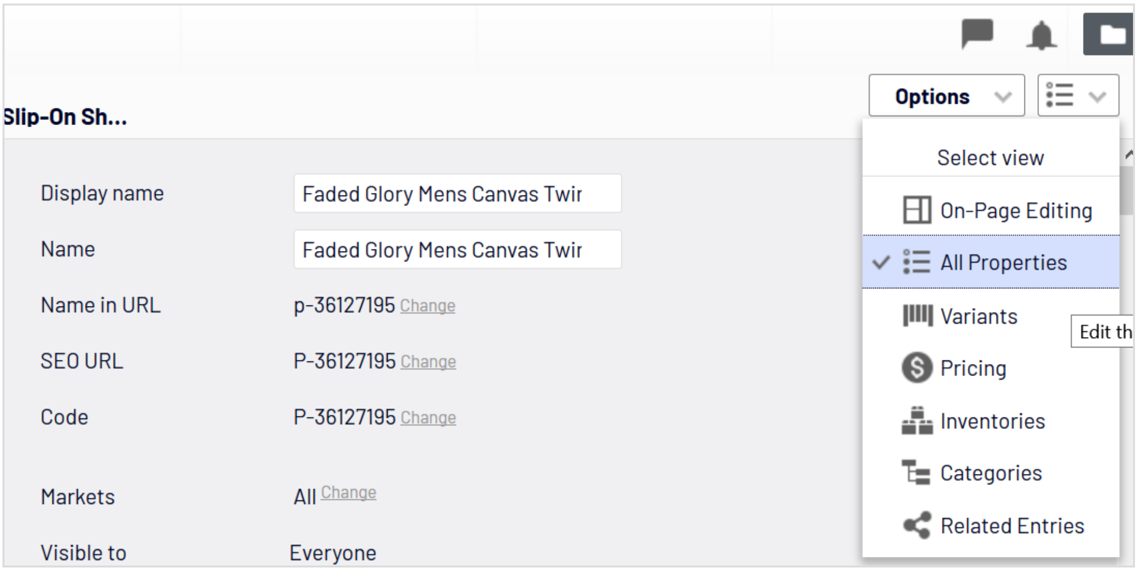
Part 1: Create custom groups

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

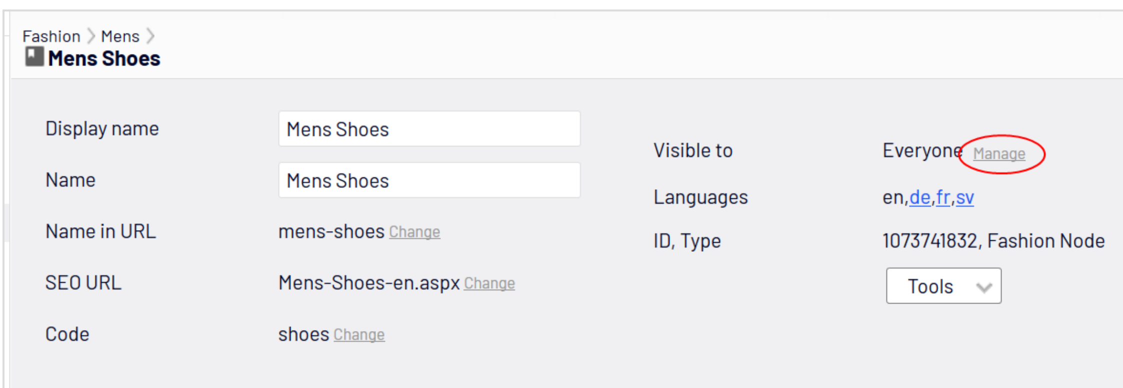
Part 2: Assign groups to catalogs/categories

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

2. Go to **All properties** view.



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



4. Uncheck **Inherit settings from parent item**.
5. Assign groups and users to appropriate actions for the catalog or category. If you do not see a group or user for which you want to assign access rights, click **Add User-s/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.

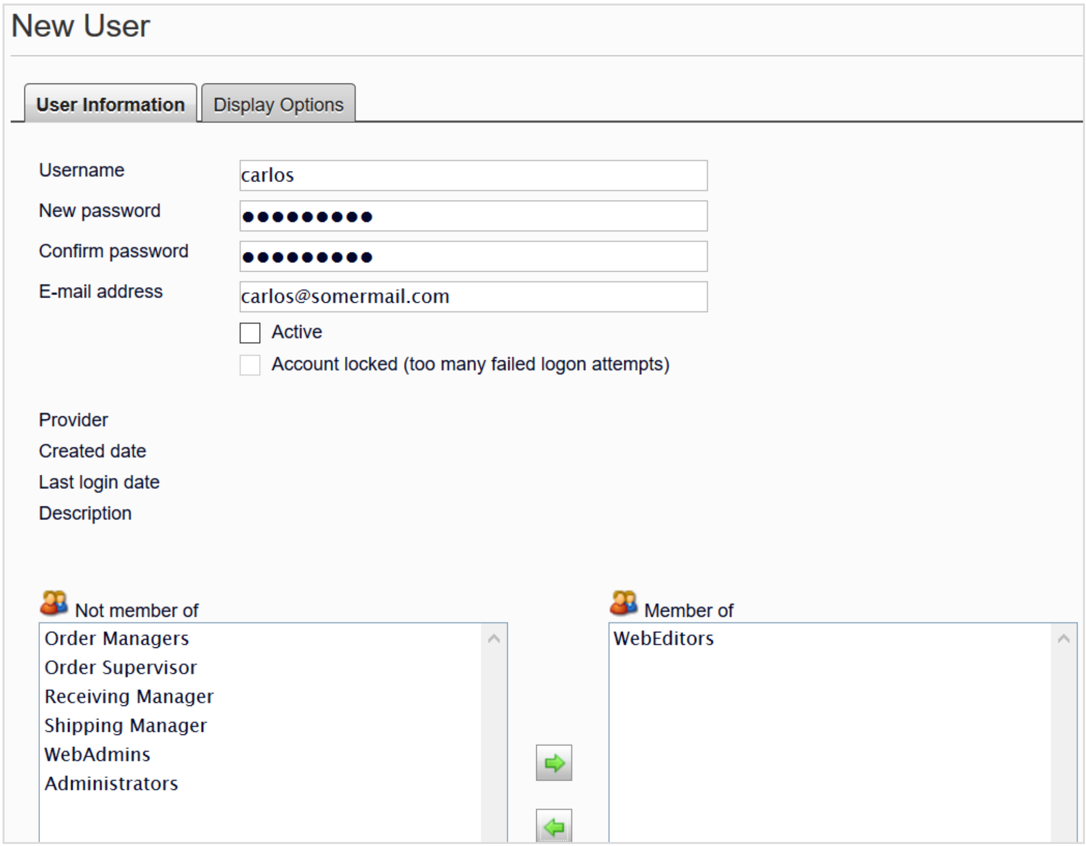
Name	Code	Price	Stock	Publishe	Availabl from	Expires	Product Type
Mens Shoe	shoes			✓	4/22/15, 7:47 AM	4/21/35, 6:00 PM	Fashion Node
Mens Jackets	jackets			✓	4/22/15, 7:48 AM	4/21/35, 6:00 PM	Fashion Node
Mens Shirts	shirts			✓	4/22/15, 7:49 AM	4/21/35, 6:00 PM	Fashion Node
Mens Sweatshirts	sweatshi			✓	4/22/15, 7:52 AM	4/21/35, 6:00 PM	Fashion Node
Mens Fashionable Bundle	Mens-Fashiona 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).



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

The Optimizely Digital Experience Platform unifies digital content, commerce and marketing in one platform, including omnichannel solutions for intelligent campaigns. The platform uses artificial intelligence and behavioral analytics to deliver personalized experiences everywhere. With our secure, reliable platform you can quickly increase engagement, revenue and productivity, while getting the fastest time to value.

About Optimizely

At Optimizely, we're on a mission to help people unlock their digital potential. We equip teams with the tools and insights they need to experiment in new and novel ways. Now, companies can operate with data-driven confidence to create hyper-personalized experiences. Building sophisticated solutions has never been simpler. Learn how we unleash new limits at **optimizely.com**.

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