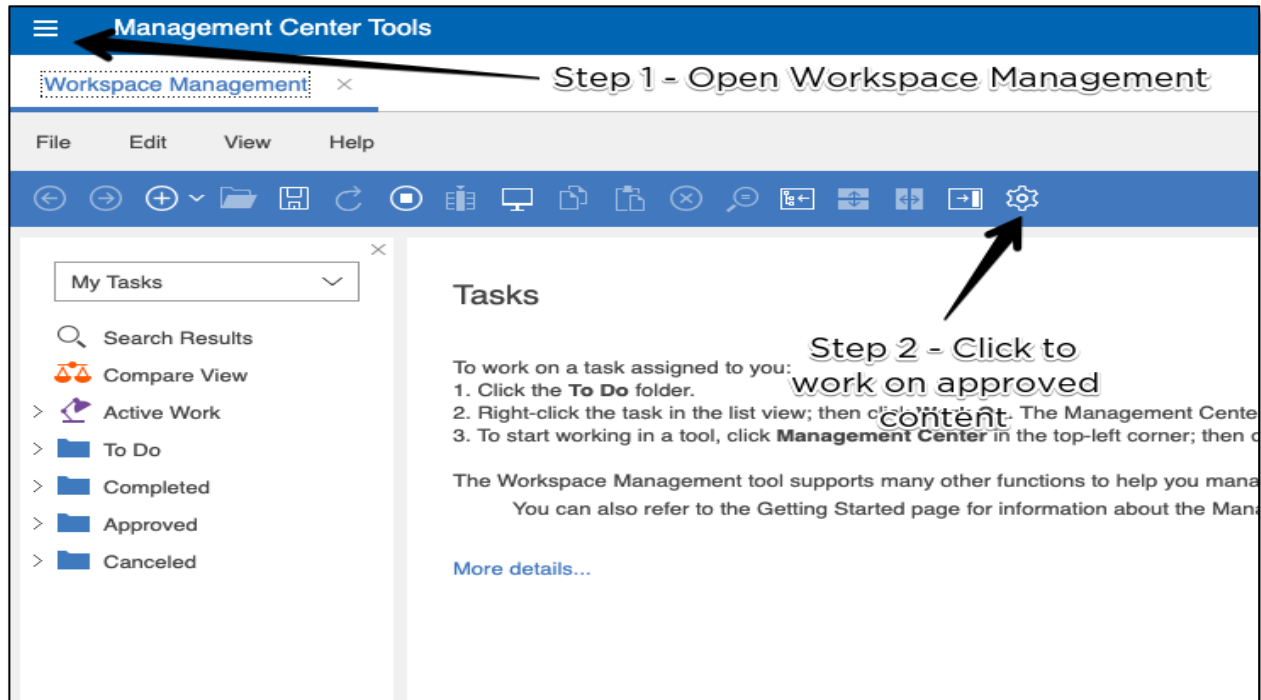# HCL Commerce CSR Demo – SoFy Environment

Step 1 – Create New CSR User

1. Open Authoring Management Center from the SoFy Solution Console link
2. Menu > Workspace Management > File > Work on Approved Content

3. Menu > Manage Organizations > Users
4. Click "New" button
5. Complete the form with the following information:
   a. **Account Information**
      i. **Login Id:** csrUser
      ii. **Email:** info@hcl.com
      iii. **Password:** passw0rd
      iv. **Parent Organization:** Root Organization
      v. **Account Policy:** Administrators
   b. **Contact Information**
      i. **Last Name:** CSR User
      ii. **Street Address:** 1234 Main Street
      iii. **City:** Charlotte
      iv. **Country:** United States
      v. **State:** North Carolina
      vi. **Zip:** 28277
   c. **Roles**
      i. **Organization:** Root Organization
      ii. **Roles:** Customer Service Representative, Customer Service Supervisor
   d. **Groups**
      i. No entries
   e. Click "Finish"

Step 2 – Modify Current Promotion

1. Menu > Promotions
   a. Verify "EmeraldSA" store is being used
2. Select Promotions from left menu
3. Disable all promotions
   a. Click first promotion and hold shift then click on last promotion
4. Right click any promotion and click "Deactivate"
5. Double click on "Bedroom Category Discount" promotion
6. Within exclude category entry section
   a. Click arrow button to open sidebar
   b. Select Browse > Master Catalog Categories
   c. Drill down to EmeraldCAS > Bedroom > Beds
   d. Double click on the BD-BEDS-0001 item
      i. Confirm that it is the Twin Bunk Bed item
      ii. Click Close
   e. Drag BD-BEDS-0001 from sidebar to the excluded catalog entries area
   f. Click Save and then Close
7. Right click on "Bedroom Category Discount" and select Activate

Step 3 – Customer Discount Issue

1. Open up Emerald Storefront from the SoFy Solution Console link
2. Click on Sign-In/Register menu item
3. Click Register Now button
4. Enter registration information
   a. **Email Address:** testuser@hcl.com
   b. **First Name:** Test
   c. **Last Name:** User
   d. **Password:** passw0rd
   e. **Verify Password:** passw0rd
5. Click Complete Registration
6. Go to Bedroom > Beds category
7. Click on Sleepy Head Elegant Queen Bed item
   a. Verify the Save 20% on Bedroom promotion text is showing
8. Click Add to Cart button
9. Go back to Beds category
10. Click on Twin Bunk Bed
    a. Verify the Save 20% on Bedroom promotion text is showin
11. Click on Add to Cart > View Full Cart
12. View that discount total appears incorrect
13. Click on Sleep Head Elegant Queen Bed from cart
    a. Verify the Save 20% on Bedroom promotion text is showing
    b. Click on cart icon
14. Click on Twin Bunk Bed
    a. Verify the Save 20% on Bedroom promotion text is showing
    b. Click on cart icon

15. Verify discount still showing as incorrect value

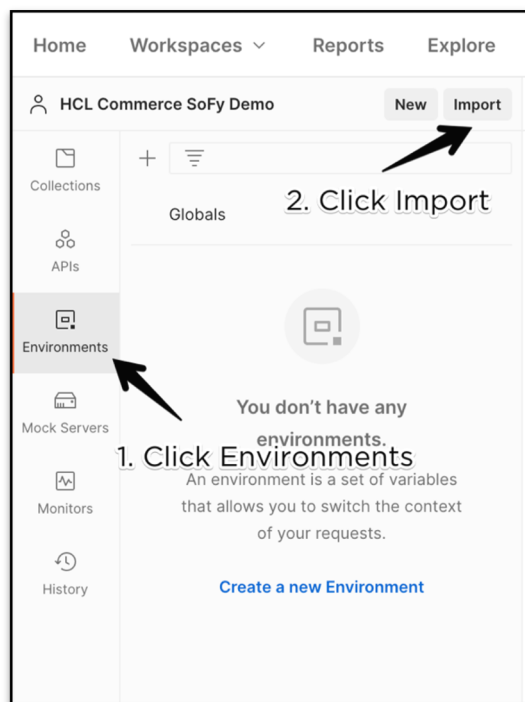## Step 4 – CSR Website Reviews Website as Customer
1. Copy up Emerald Storefront link from the SoFy Solution Console link
2. Past link in browser and replace Emerald with csr
3. Login to Customer Service Hub using csrUser | passw0rd
4. Select Emerald store
5. Click on Customer Search
6. Enter the customer email address (testuser@hcl.com) in Logon ID box and click Search
7. Click on Actions > Customer Details
8. Click on Shop For This Customer button on top left
   a. Verify the top right of the page indicates the csrUser as the "Username", Emerald as the "Selected Store", and Test User for the "Shopping as"
9. Click on shopping cart menu item > view full cart
10. Click on "Twin Bunk Bed" item in the cart
    a. Verify the Save 20% on Bedroom promotion text is showing
11. Go to Beds > Sleep Head Low Key Double Bed
    a. Verify the Save 20% on Bedroom promotion text is showing
12. Click on shopping cart menu item > view full cart
13. Click on delete for Twin Bunk Bed item
    a. Click Yes on message
    b. Click Delete again
14. Confirm that discount value has not changed

Step 5 – Add Order Comments and Unlock Order
1. Click on "Shopping As" and select "Switch Customer Account"
2. Click "Back to Landing Page"
3. Click on "Order Search"
4. Enter "testuser@hcl.com" for Customer Login ID and click Search
5. Click Actions > View Order Details
6. Click on Show Order Item Table slider button to show line items
   a. Confirm only the single BD-BEDS-0002-0001 item is showing
7. Click on Add a new comment
   a. Enter "Removed invalid item from users cart. Need to address content issue with marketing – should not display promotion message on the invalid item page"
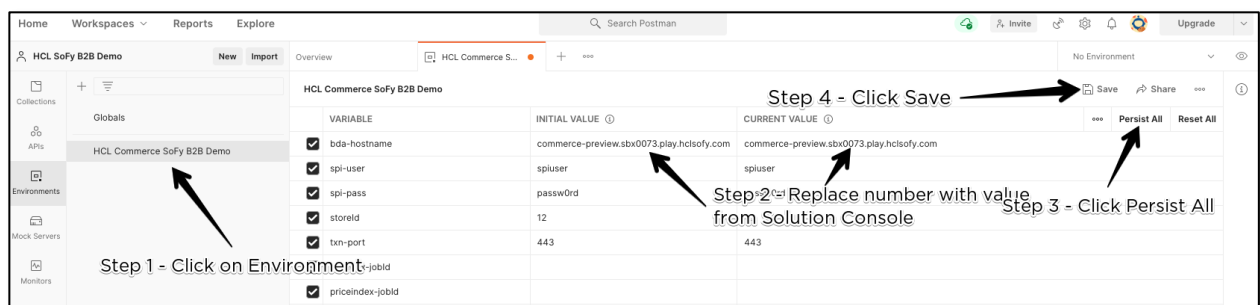   b. Click Save
8. Click on "Unlock Order" button

Step 6 – Perform CSR Tasks with APIs
1. Open Postman
2. Import Environment JSON into the workspace
   a. Select Environments > Import
   b. Click "Upload Files" and select the "HCL Commerce SoFy CSR Demo - Environment.json" or drag file into the window
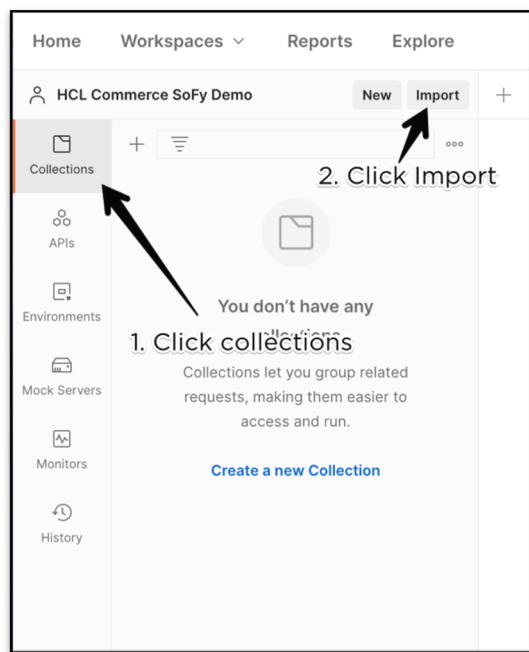   c. Click Import

3. Update "bda-hostname" variable
   a. Click on "HCL Commerce SoFy CSR Demo"
   b. Update the current value of "sofy-hostname" by replacing the number values with the number shown on your SoFy Solutions Console
   c. Verify that the csrUserId and csrPassword values are the same as what was created earlier
   d. Update the customerEmail value to be the same as the customer that was created
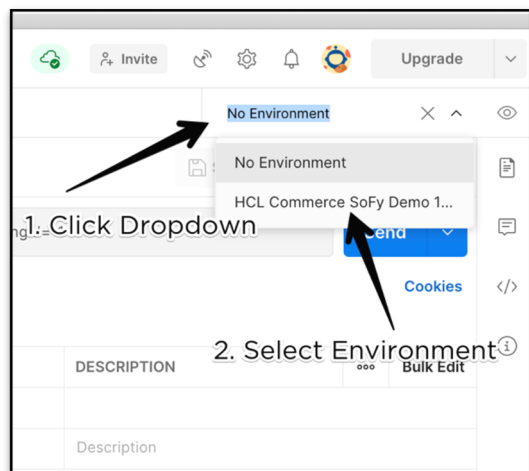   e. Click Persist All
   f. Click Save

4. Import API Collection into the workspace
   a. Select Collections > Import
   b. Click "Upload Files" and select the "HCL Commerce SoFy CSR Demo - API Collection.json" or drag file into the window
   c. Click Import

5. Run API Collection
    a. From the collections area, click "HCL Commerce SoFy CSR Demo" to expand APIs
    b. Click on "Find Customer by LogonId" API
    c. On the right side, click on "No Environment" and select "HCL Commerce SoFy CSR Demo" from the dropdown menu

    d. Run API by clicking "Send"
    e. Verify return details look correct
    f. Click on Update Customer Details API
        i. Click on the Body section to view the customer details to be updated
        ii. Click Send
        iii. Verify return details
    g. Select the Find Customer by LogonId API again and click Send
        i. Verify that the address information that was part of the previous API call has been updated

h. Select Get Customer Orders API and click Send
i. Select Get Order Details API and click Send
    i. Review order details
j. Select Get Order Comments API and click Send
    i. Verify that no order comments are shown for the order
k. Select Add Order Comment API
    i. Click on Body section to view the default comment that will be added
    ii. Click Send
    iii. Verify that API returns "The comments were added successfully."
l. Select Get Order Comments API and click Send
    i. Verify that the order comments is now showing for the order