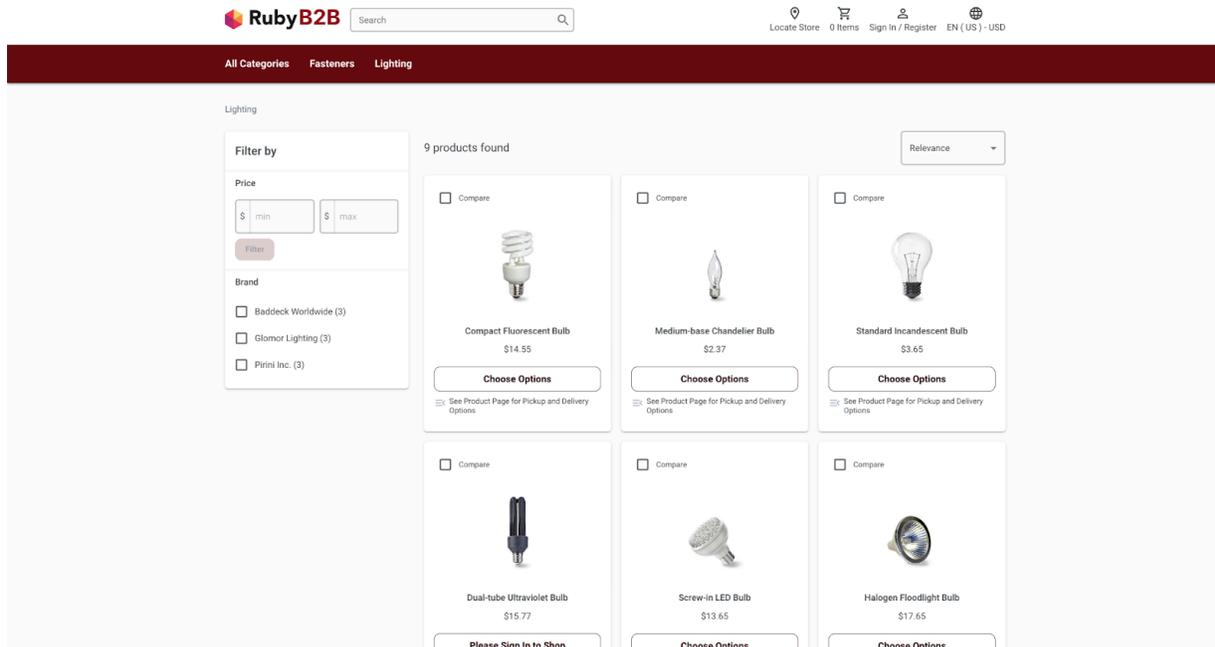


HCL Commerce B2B Demo – SoFy Environment

Step 1 - Review Current Website Content

1. Open up Ruby B2B Storefront from the SoFy Solution Console link
2. Review the products categories that are shown (Fasteners and Lighting)
3. Click on the lighting and view the products listed
 - a. Make note of the variety of prices



Step 2 – Register New Organization

1. Within the Ruby B2B store, click on the “sign-in” button in the upper right corner
2. Click on “Organization Registration” button
3. Complete the form with the following information:
 - **Organization Name:** Charlotte Lighting
 - **Email:** info@charlight.com
 - **Address Line 1:** 1234 Main Street
 - **Zip/Postal Code:** 28277
 - **State/Province:** NC
 - **City:** Charlotte
 - **Country:** USA
 - **Logon Id:** cladmin
 - **First Name:** Charlotte Lighting
 - **Last Name:** Admin
 - **Email:** info@charlight.com
 - **Password:** passw0rd
 - **Verify Password:** passw0rd
 - **Use Same Address as Organization:** Check Box (Yes)

RubyB2B Search

Locate Store 0 Items Sign In / Register EN (US) - USD

All Categories Fasteners Lighting

1 Register your organization 2 Register an administrator

Organization Registration

Organization Name *

Charlotte Lighting Company

Email *

info@charlight.com

Phone (optional)

Address Details

Address line 1 *

1234 Main Street

Address line 2 (optional)

Zip Code / Postal Code *

28277

Country *

USA

State / Province *

NC

City *

Charlotte

Next, register an administrator

3. Click Complete Registration
4. Click OK on registration received notification

All Categories Fasteners Lighting

1 Register your organization 2 Register an administrator

Register an administrator

Logon ID *

info@charlight.com

First Name *

Charlotte Lighting

Last Name *

Admin

Password *

.....

Email *

info@charlight.com

Address Details

Use same address as organization

Account Preferences

Preferred Language

United States English

Preferred Currency

US Dollar

Back Complete Registration

Your registration request has been received. Your account is waiting for approval. Until your account is approved, you cannot log on.

OK

RubyB2B CUSTOMER SERVICE COMPANY FOLLOW US

Step 3 – Approve Organization

1. Open Management Center from the SoFy Solution Console link
2. Menu > Manage Organizations > Approvals

- a. Click on checkmarks to approve both the Organization and the User

Approvals Authored

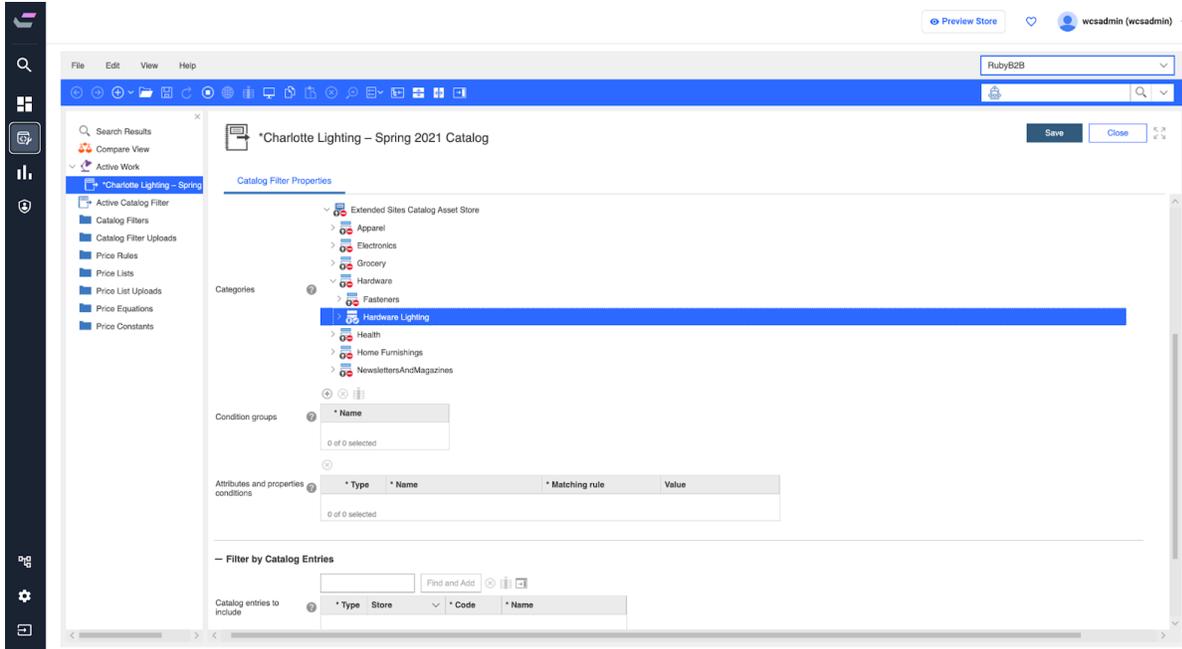
Search Show filters

Requestor	Entity ID	Approver	Approval Type	Status	Last Update	Actions
info@charlight.com (Charlotte Lighting Admin)	73333333333342335	wcsadmin (wcsadmin)	Organization registration	Pending	1/28/2025, 5:26:17 AM	
info@charlight.com (Charlotte Lighting Admin)	3	wcsadmin (wcsadmin)	Buyer user registration	Pending	1/28/2025, 5:26:18 AM	Approve

Results per page 10 1 - 2 of 2

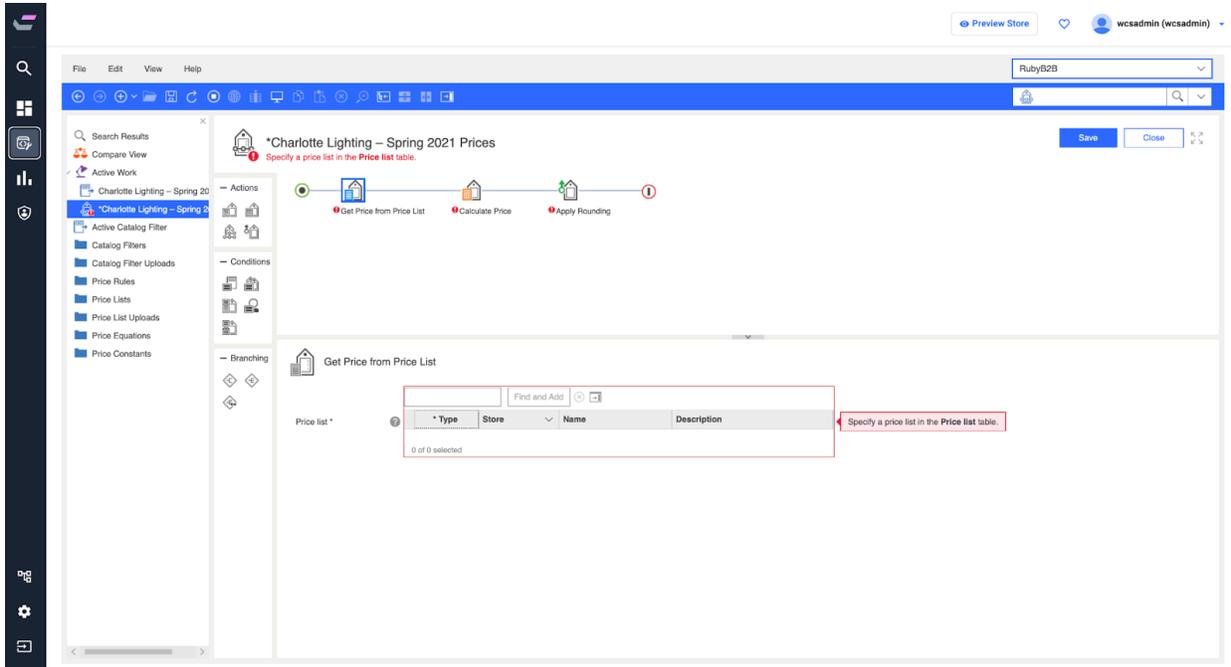
Step 4 – Create Catalog Filter

1. In the Management Center Dashboard, under Manage Accounts click Catalog Filter and Pricing
 - a. From the store drop down on the top right, confirm you are using the “Ruby B2B” store
 - b. Right click “Catalog Filters’ from left menu and select “New Catalog Filter”
 - c. Complete Catalog Filter form with the following information:
 - i. Name: Charlotte Lighting – Spring 2021 Catalog
 - ii. Description: Charlotte Lighting contracted products
 - iii. Filter By Categories, Attributes, and Properties
 1. Expand category tree
 2. Right click on Extended Sites Catalog Asset Store and select “Exclude”
 3. Expand Hardware, right click on Hardware Lighting and select “Include”
 - d. Save > Close



Step 5 – Create Price Rule

1. Right click “Price Rules” from left menu and select “New Price Rule”
 - a. Name: Charlotte Lighting – Spring 2021 Prices
2. From the Actions workspace, drag over the following items
 - a. Get Price from Price List, Calculate Price, and Apply Rounding
3. Select “Get Price from Price List” action
 - a. Enter “*” in search box and click “Find and Add”
 - b. From result window, drag over “Extended Sites Catalog Asset Store”
4. Select “Calculate Price” Action
 - a. Select “Mark down price” radio button
 - b. Enter “25” for the Markdown%
5. Select “Apply Rounding” Action
 - a. Click checkbox for USD
 - b. Enter “*.77” for the pattern
6. Click Save and Close



Step 6 – Create New Account

1. In the Management Center Dashboard, under Manage Accounts click Accounts and Contracts
2. Click “New”
3. Complete form with following information
 - a. Account Details
 - i. Organization: Charlotte Lighting Company
 - ii. Click Next
 - b. Purchase Order
 - i. Click Next
 - c. Credit Line
 - i. Click Next
 - d. Payment and Billing
 - e. Check the following check boxes
 - i. Customer’s personal address book
 - ii. Customers parent organization’s address book
 - f. Shipping
 - i. Click the following check boxes
 1. Shipping Methods: MailShipping
 2. Shipping Charge Types: Shipping charged by seller
 3. Shipping Addresses:
 4. Charlotte Lighting Company: 1234 Main Street, Charlotte, NC, 28277, USA
 5. In Addition Section:
 - a. Customer’s personal address book
 - b. Customer’s parent organization’s address

Shipping

Select the shipping methods for the account

Search

Select All (6)

B2CExpress1

MailShipping

Pick up in store shipping policy

Shipping policy for A1

Shipping policy for A2

Shipping policy for A3

SELECTED SHIPPING METHODS

MailShipping x

Select the shipping charge types for the account

Search

Shipping charged by carrier

Shipping charged by seller

SELECTED SHIPPING CHARGE TYPES

Shipping charged by seller x

Select the shipping addresses for the account

Search

Charlotte Lighting Company: 1234 Main Street, Charlotte, NC, 28277, USA

SELECTED SHIPPING ADDRESSES

Charlotte Lighting Company x

In addition to the selected shipping addresses, a customer can use the shipping address from the following address books.

ii. Click on Finish

Step 7 – Create Contract

1. From Accounts screen, click on the “0” under Contracts for Charlotte Lighting Company
2. Click New
3. Complete form with following information
 - a. Contract Details
 - i. Name: Charlotte Lighting - Spring 2021 Contract
 - ii. Description: Charlotte Lighting - Spring 2021 Contract
 - iii. Click check boxes for “Starts Immediately” and “No expiry date”
 - iv. Click Next
 - b. Participants
 - i. Available Organizations: Charlotte Lighting Company
 - ii. Click Next
 - c. Catalog filter and price rule
 - i. Catalog Filter: Charlotte Lighting – Spring 2021 Catalog
 - ii. Price Rule: Charlotte Lighting – Spring 2021 Prices – Sapphire
 - iii. Click next
 - d. Payment and billing
 - i. Click checkboxes for
 1. Customer’s personal address book
 2. Customer’s parent organization’s address book
 - ii. Click next
 - e. Shipping
 - i. Shipping Methods: Click checkbox for MailShipping
 - ii. Shipping Charge Type: Click checkbox for Shipping charged by seller

- iii. Shipping Addresses:
 1. Click checkboxes for
 - a. Charlotte Lighting Company
 - b. Customer's personal address book
 - c. Customer's parent organization's address book
 - iv. Click next
- f. Click Finish
- g. Click on the 3 dots under Actions and click submit

Step 8 – Verify Contract Pricing and Catalog Filter

- Open up RubyB2B Storefront from the SoFy Solution Console link
- Click on Sign button at top right of screen
 - Login using cladmin | passw0rd
- Verify that only the Lighting category is showing
- Click on Lighting category to view the lighting products
 - Verify that all products are showing prices that are lowered 25% and end in .77