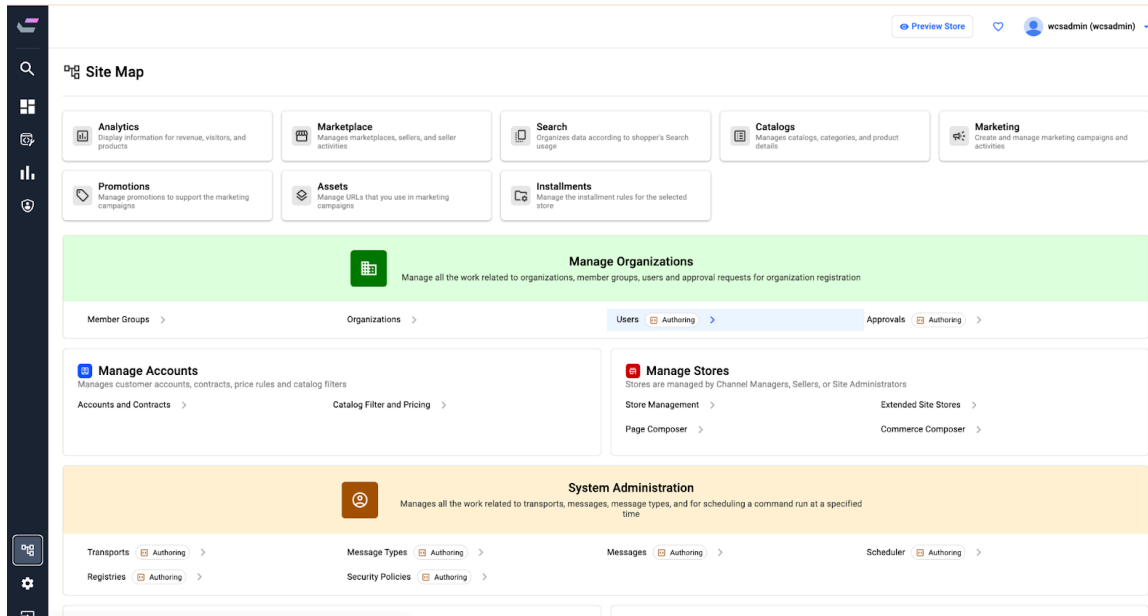


HCL Commerce CSR Demo – SoFy Environment

Step 1 – Create New CSR User

1. Open Authoring Management Center from the SoFy Solution Console link
2. Navigate to Users



3. Click New in the top left corner
4. 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 the EmeraldSAS 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 the 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 the Ruby (B2C) Store 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

Ruby Search

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

All Categories Living Room Bath Bedroom Dining Room Kitchen

Register

Logon ID *

testuser

First Name * Last Name *

Test User

Password * Verify Password *

.....

Email Address * Phone (optional)

☐ Receive home design ideas sent to your inbox

☐ Remember Me

Complete Registration

Already have an account?

Sign In

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 showing
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**

Step 4 – CSR Website Reviews Website as Customer

1. Copy the **Ruby** (B2C) Store link URL from the SoFy Solution Console link
2. Paste the link in the browser and replace **Ruby** in the URL with **/csr**
3. Login to Customer Service Hub using **csrUser | passw0rd**
4. You will be asked to change your password. Change it to **passw0rd1**
5. Select Emerald store
6. Click on Customer Search
7. Enter the customer email address (testuser@hcl.com) in Logon ID box and click Search

8. Click on Actions > Customer Details
9. Click on Shop For This User button on top left
 - a. Verify the top right of the page indicates the csrUser as the "Username", Ruby as the "Selected Store", and Test User for the "Shopping as"
10. Click on the shopping cart menu icon then **select** View Full Cart
11. Click on the Twin Bunk Bed item in the cart
 - a. Verify the Save 20% on Bedroom promotion text is showing
12. Go to Beds > Sleepy Head Low Key Double Bed
 - a. Verify the Save 20% on Bedroom promotion text is showing
13. Click on shopping cart menu icon > **View Full Cart**
14. Click on the delete icon for the Twin Bunk Bed item
 - a. Click **Yes** on message
 - b. Click **Delete** again
15. Confirm that the 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 user's 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

← Back to Order Search Results

2369194

Lock Status: Locked by you

Unlock Order

Order Status: Pending

Checkout as the shopper

Order Details

Hide Order Item Table

Order Date: 2/3/2025

Order Time: 14:02:49

Order Subtotal

Discounts

Tax

Shipping

Shipping Tax

Order Total

\$1,249.99

-\$250.00

\$0.00

\$0.00

\$0.00

\$999.99

Order Item Details

Order Item	Shipping Address	Status	Quantity	Each	Total
Sleepy Head Elegant Queen Bed 80-80DS-0002-0001		Pending	1	\$1,249.99	\$1,249.99

5 rows < > Showing 1 to 1 of 1 >

Comments

Add a new comment

Removed invalid item from user's cart. Need to address content issue with marketing - should not display promotion message on the invalid item page

Save Cancel

Latest Comments > Show all comments

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