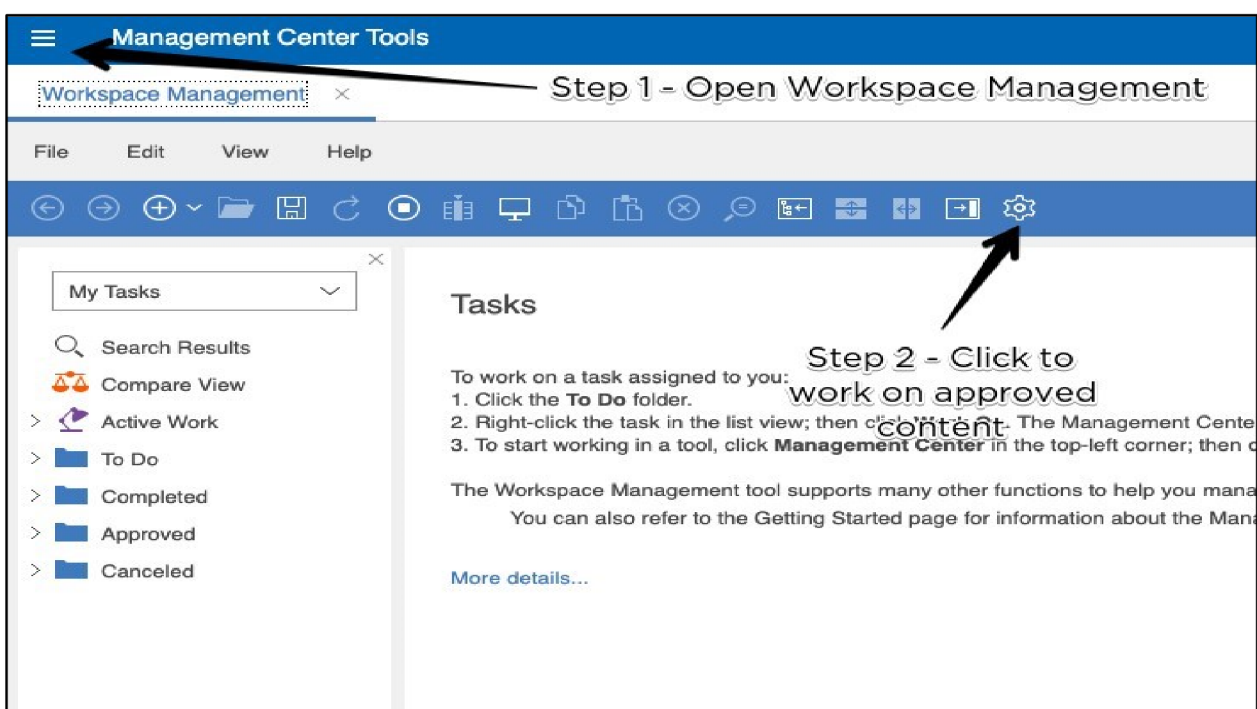


# HCL Commerce CSR Demo – SoFy Environment

## 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](mailto: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 **Emerald (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](mailto:testuser@hcl.com)
  - b. **First Name:** Test
  - c. **Last Name:** User
  - d. **Password:** passw0rd
  - e. **Verify Password:** passw0rd
5. Click **Complete Registration**

Confidential

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**
15. Verify discount still showing as incorrect value

#### Step 4 – CSR Website Reviews Website as Customer

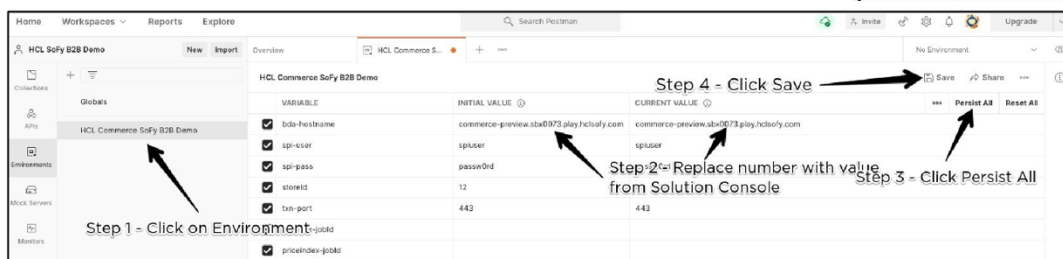
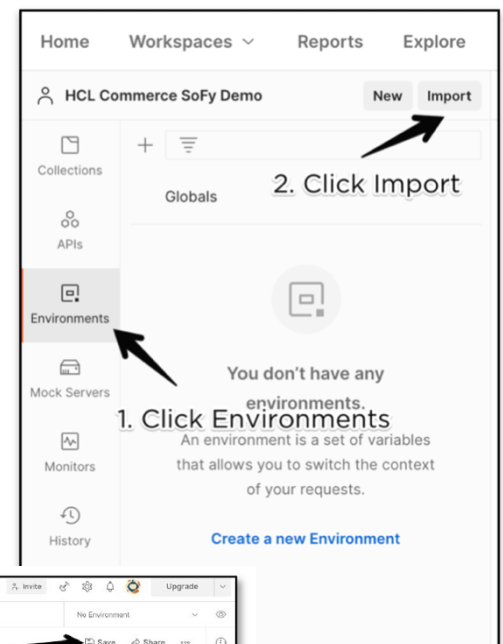
1. Copy the **Emerald (B2C) Store** link URL from the SoFy Solution Console link
2. Paste the link in the browser and replace **Emerald** in the URL with **csr**
3. Login to Customer Service Hub using **wcsadmin | wcs1admin**
4. You will be asked to change your password. Change it to **passw0rd1**
5. Select **Emerald** store
6. Click on **Customer Search**
7. Enter the customer email address ([testuser@hcl.com](mailto: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”, **Emerald** as the “Selected Store”, and **Test User** for the “Shopping as”
10. Click on shopping cart menu icon then select **View Full Cart**
11. Click on **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
14. 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

## 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 **HCL Commerce SoFy CSR Demo.postman\_environment.json** or drag the file into the window
  - c. Click **Import**
3. Update the **sofy-hostname** variable
  - a. Click on **HCL Commerce SoFy Demo**
  - b. Update the current value of **sofy-hostname** by replacing the four asterisks with the number values in the URL of your SoFy Solution Console.
  - c. Verify the **csrUserId** value is “csrUser” and the **csrPassword** value is “passw0rd1”.
  - d. Update the **customerEmail** value to [testuser@hcl.com](mailto:testuser@hcl.com)
  - e. Click **Persist All**
  - f. Click **Save**



4. Import the API collection into the workspace
  - a. Select **Collections > Import**
  - b. Click “Upload Files” and select the **HCL Commerce SoFy CSR Demo.postman\_collection.json** or drag file into the window
  - c. Click **Import**

5. Run the API Collection

- a. From the collections area, click **HCL Commerce SoFy CSR Demo** to expand APIs
- b. Click on the **Find Customer by LogonId** from the API list
- c. On the right side, click on “No Environment” and select **HCL Commerce SoFy CSR**
- d. Run the 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** again
  - i. Verify that the new order comment is now showing for the order

