# 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

| ■ Management Center Tools  |  |
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| Workspace Management $\times$  | Step 1 - Open Workspace Management   |
| File Edit View Help  |  |
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| My Tasks<br>Search Results<br>Compare View<br>Active Work<br>Active Work<br>To Do<br>Completed<br>Approved<br>Canceled | Tasks Step 2 - Click to   To work on a task assigned to you: 1. Click the To Do folder.   Work on approved 2. Right-click the task in the list view; then ccontering the top-left corner; then c   3. To start working in a tool, click Management Center in the top-left corner; then c   The Workspace Management tool supports many other functions to help you mana You can also refer to the Getting Started page for information about the Mana   More details |

- 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 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

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- 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
  - 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 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 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", 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 non 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".

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- d. Update the **customerEmail** value to <u>testuser@hcl.com</u>
- e. Click Persist All

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f. Click Save

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- 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** <u>Commerce SoFy CSR Demo</u> 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."
- I. Select Get Order Comments API and click Send again
  - i. Verify that the new order comment is now showing for the order



