HCL Commerce B2B Demo – SoFy Environment

Some introduction and details go here

Step 1 - Review Current Website Content

1. Open up Sapphire 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 Sapphire 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:
   a. **Organization Name:** Charlotte Lighting Company
   b. **Email:** info@charlight.com
   c. **Address Line 1:** 1234 Main Street
   d. **Zip/Postal Code:** 28277
   e. **State/Province:** NC
   f. **City:** Charlotte
   g. **Country:** USA
   h. **Logon Id:** cladmin
   i. **First Name:** Charlotte Lighting
   j. **Last Name:** Admin
   k. **Email:** info@charlight.com
   l. **Password:** passw0rd
   m. **Verify Password:** passw0rd
   n. **Use Same Address as Organization:** Check Box (Yes)

4. Click Complete Registration
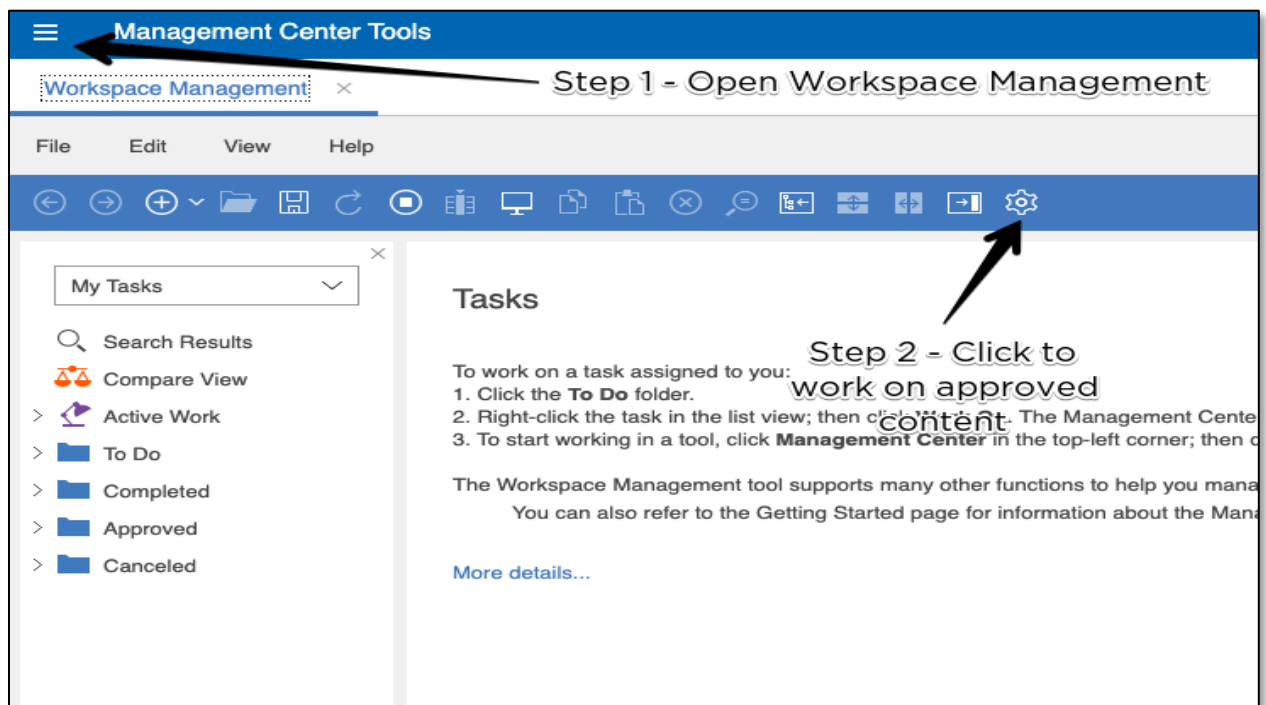5. Click OK on registration received notification
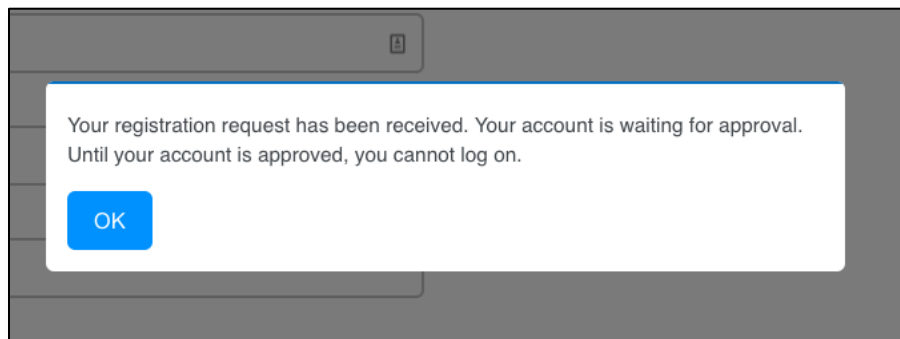
Step 3 – Approve Organization

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

3. Menu > Manage Organizations > Approvals
   a. Click on checkmarks to approve both the Organization and the User
   b. Click Approve on the window – no comments needed
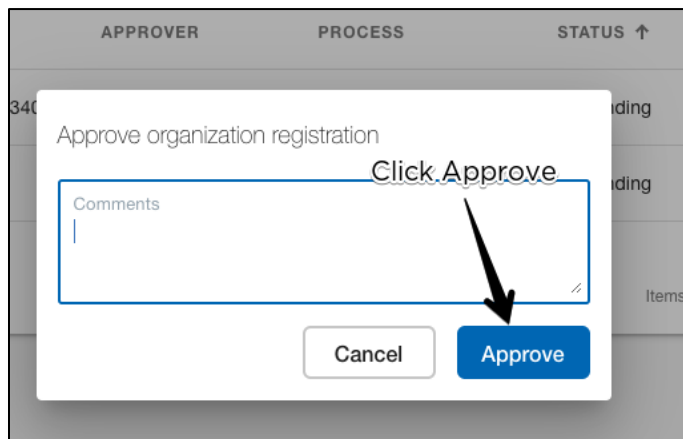
Step 4 – Create Catalog Filter

1. Menu > Manage Accounts > Catalog Filter and Pricing
   a. From the store drop down on the top right, confirm you are using the "Sapphire" 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
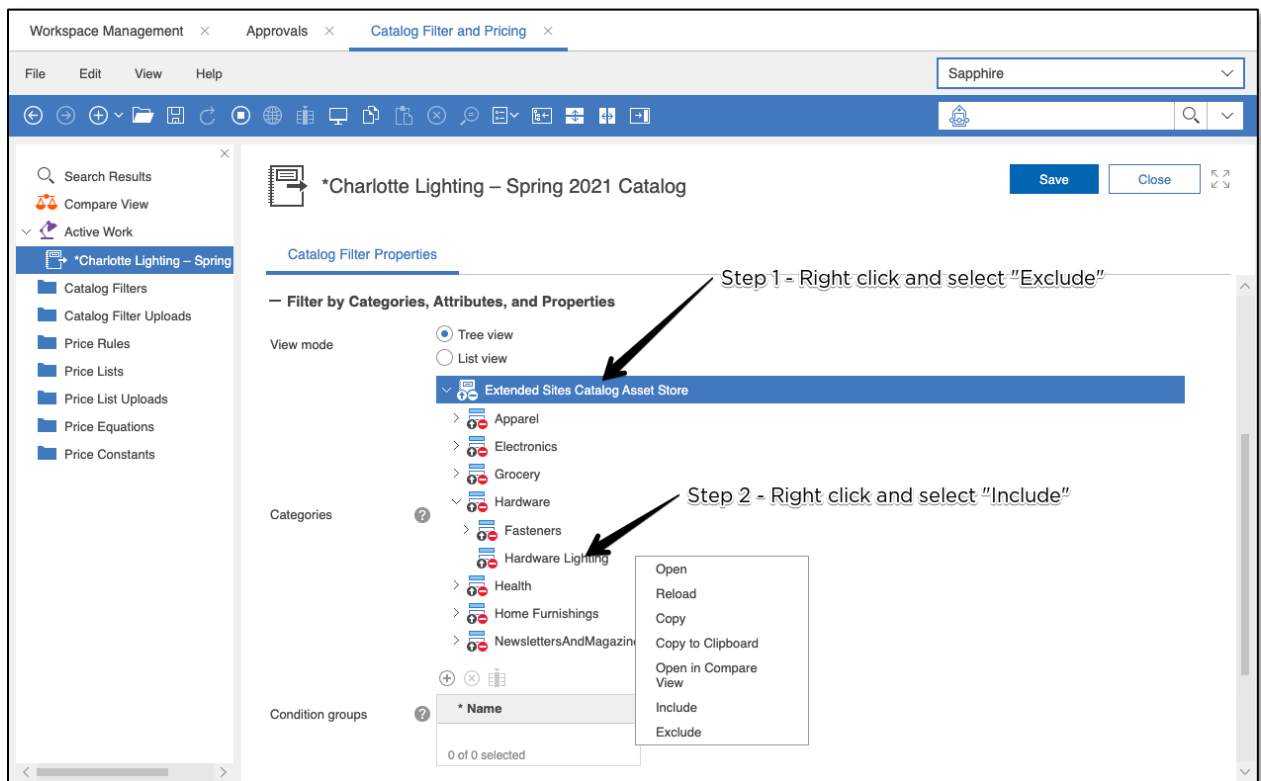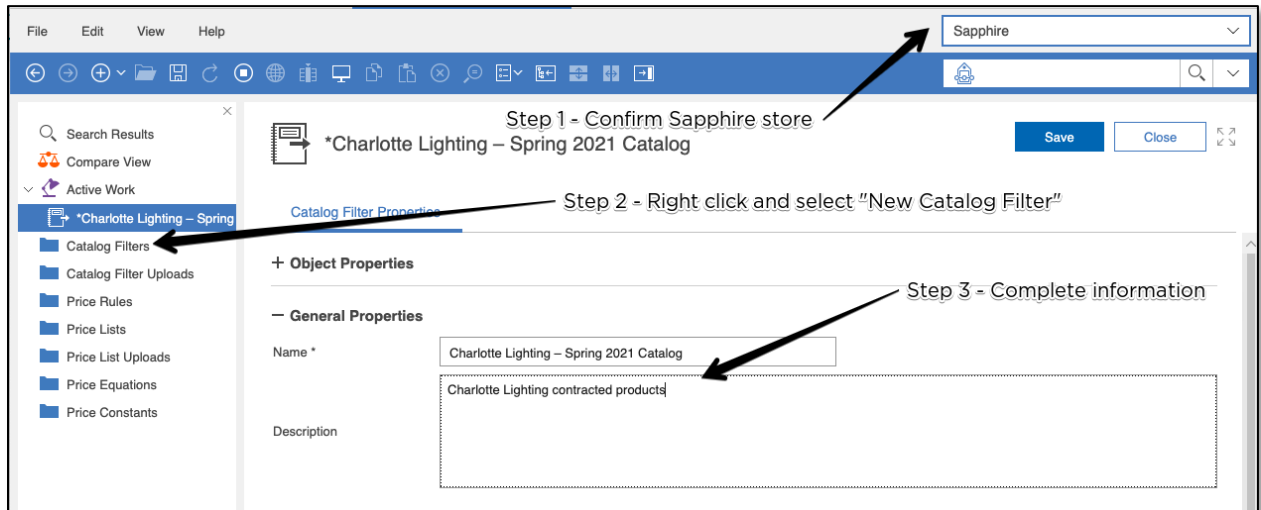
Step 5 – Create Price Rule

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
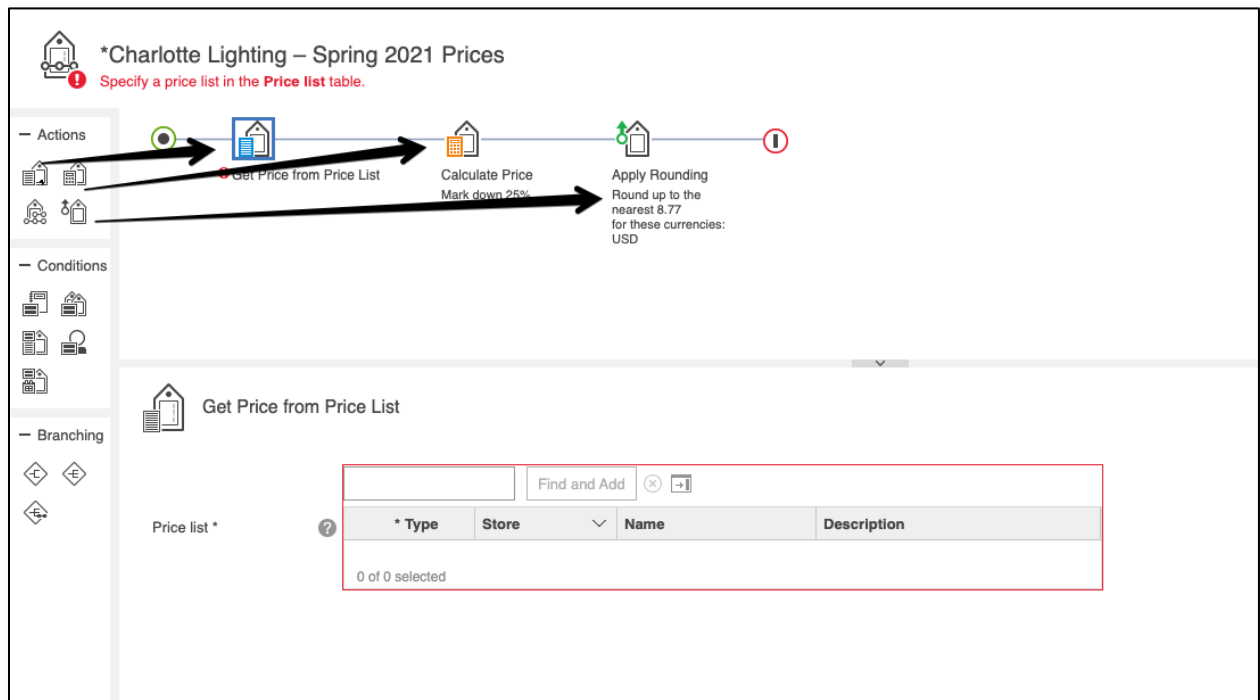
3. Select "Get Price from Price List" action
    a. Enter "*" in search box and click "Find and Add"
    b. From result window, drag over "Extended Sites Catalog Asset Store"
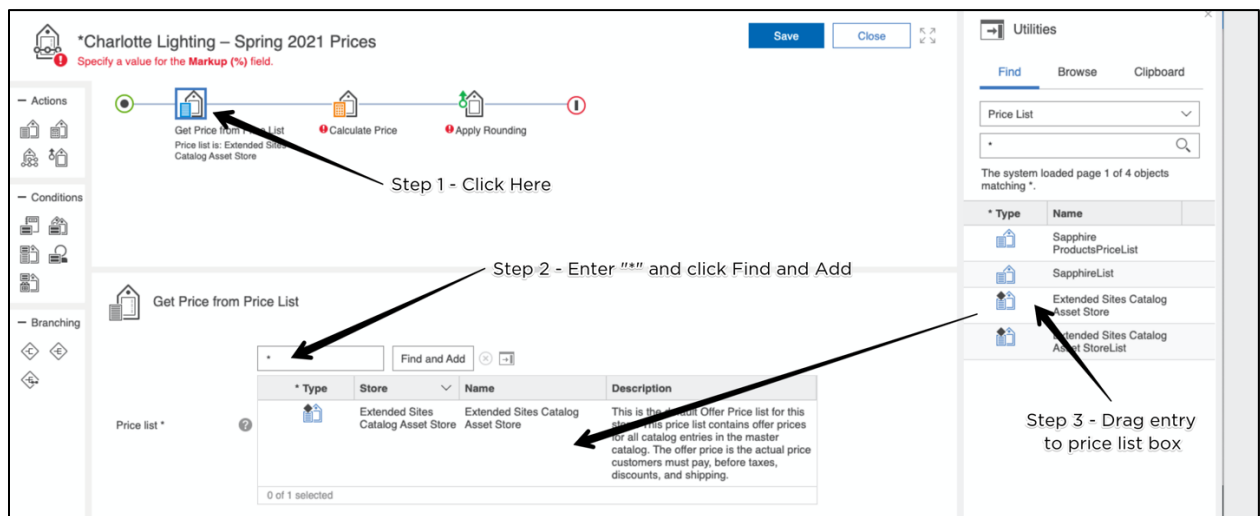
4. Select "Calculate Price" Action
    a. Select "Mark down price" radio button
    b. Enter "25" for the Markdown%

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. Menu > Manage Accounts > 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**

i. Check the following check boxes
     1. Customer's personal address book
     2. Customers parent organization's address book

e. **Shipping**
   i. Click the following check boxes
      1. **Shipping Methods:** MailShipping
      2. **Shipping Charge Types:** Shipping charged by seller
      3. **Shipping Addresses:** Charlotte Lighting Company
      4. **In Addition Section:**
         a. Customer's personal address book
         b. Customer's parent organization's address book
   ii. Click on Finish

⑤ Shipping (optional)

Select the shipping methods for the account.

AVAILABLE SHIPPING METHODS

Search
Search

☐ B2CExpress1
☑ MailShipping
☐ Pick up in store shipping policy
☐ Shipping policy for A1
☐ Shipping policy for A2
☐ Shipping policy for A3

SELECTED SHIPPING METHODS

MailShipping ⊗

Select the shipping charge types for the account.

AVAILABLE SHIPPING CHARGE TYPES

Search

☐ Shipping charged by carrier
☑ Shipping charged by seller

SELECTED SHIPPING CHARGE TYPES

Shipping charged by seller ⊗

Select the shipping addresses for the account.

AVAILABLE SHIPPING ADDRESSES

Search

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

SELECTED SHIPPING ADDRESSES

No selections have been made.

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

☑ Customer's personal address book
☑ Customer's parent organization's address book
☐ Customer's business account organization's address book

Back   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
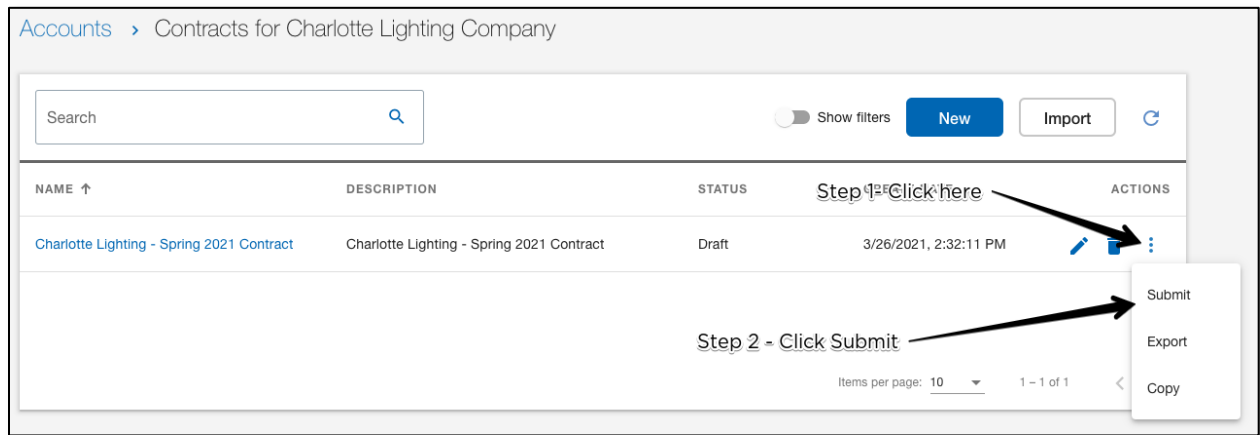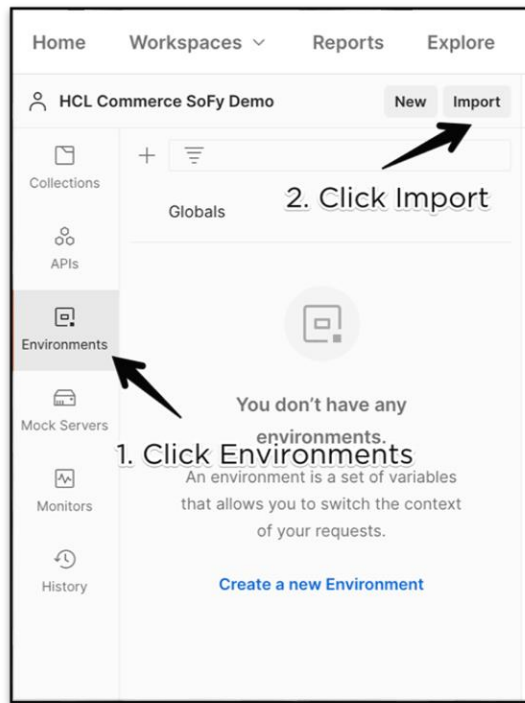

Step 8 – Update Catalog and Pricing Information

1. Open Postman
2. Import Environment JSON into the workspace
  a. Select Environments > Import
  b. Click "Upload Files" and select the "HCL Commerce SoFy B2B Demo - Environment.json" or drag file into the window
 c. Click Import

3. Update "bda-hostname" variable
   a. Click on "HCL Commerce SoFy B2B Demo"
   b. Update the current value of "bda-hostname" by replacing the number values with the number shown on your SoFy Solutions Console
   c. Click Persist All
   d. Click Save
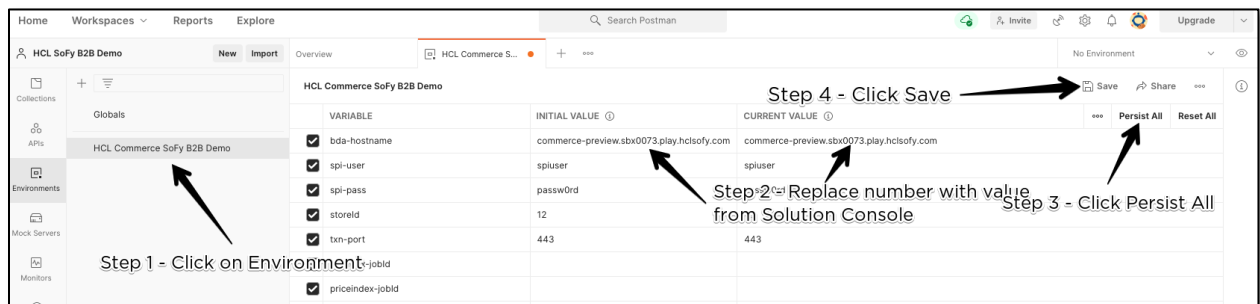
4. Import API Collection into the workspace
   a. Select Collections > Import
   b. Click "Upload Files" and select the "HCL Commerce SoFy B2B Demo - API Collection.json" or drag file into the window
   c. Click Import
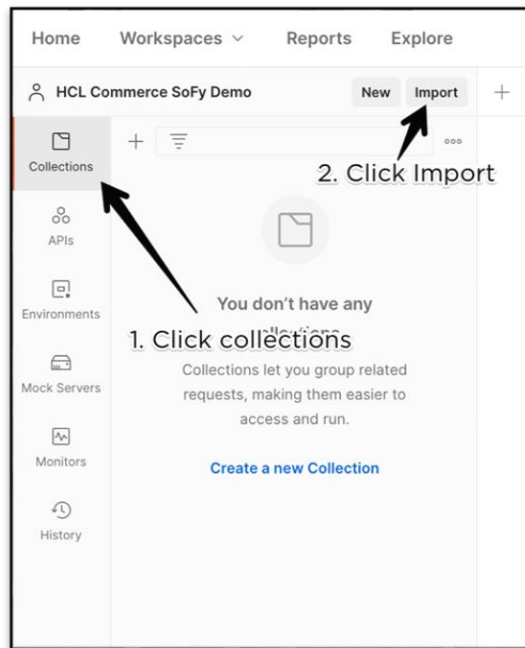
5. Run API Collection
   a. From the collections area, click "HCL Commerce SoFy B2B Demo" to expand APIs
   b. On the right side, click on "No Environment" and select "HCL Commerce SoFy B2B Demo" from the dropdown menu
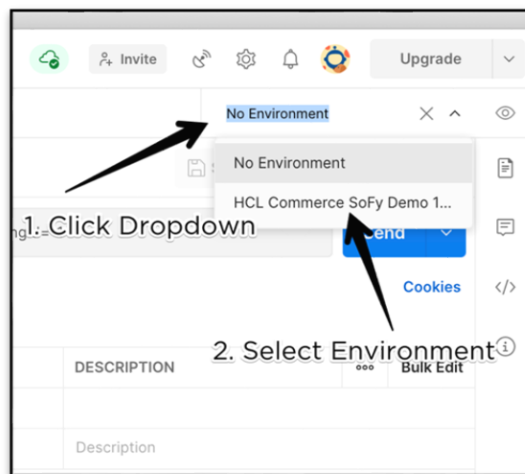
   c. Select "SoFy Sapphire Full Index Build" API > Click "Send" > Verify results
      i. Call will return data to confirm the build has started by returning a jobStatusId value

d. Select "SoFy Check Status of Full Index" API > Click "Send" > Verify results
   i. Call will return status information
   ii. Process will complete in 5-10 minutes and message value will say "Ingest job finished successfully for storeId: 12."

e. Select "SoFy Sapphire Price Calculation" API > Click "Send" > Verify results
   i. Call will return data to confirm the build has started by returning a jobStatusId value
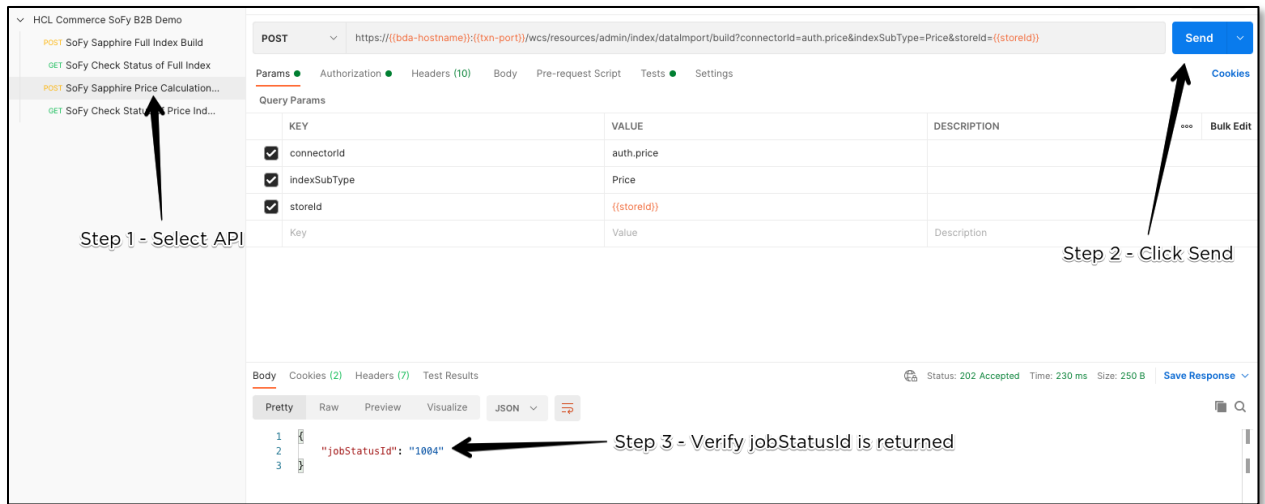
f. Select "SoFy Check Status of Price Index" API > Click "Send" > Verify results
    i. Call will return status information
    ii. Process will complete 1-2 minutes and message value will say "Indexing job finished successfully."

Step 9 – Verify Contract Pricing and Catalog Filter
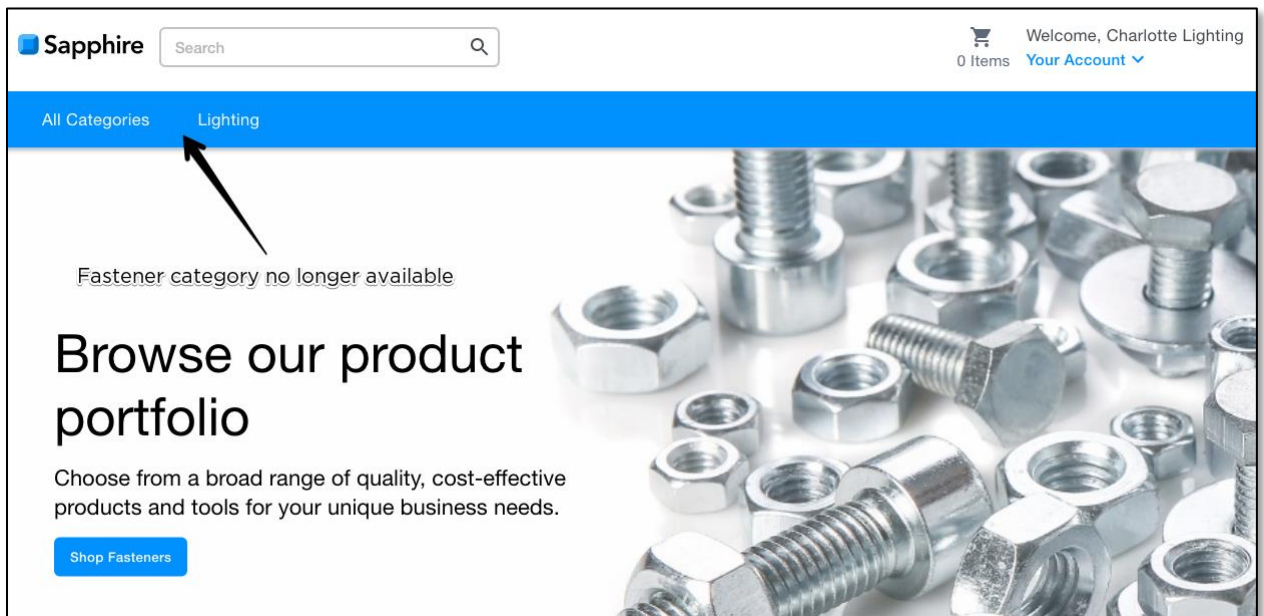
1. Open up Sapphire Storefront from the SoFy Solution Console link
2. Click on Sign button at top right of screen
    a. Login using cladmin | passw0rd
3. Verify that only the Lighting category is showing

4. Click on Lighting category to view the lighting products
    a. Verify that all products are showing prices that are lowered 25% and end in .77

Sapphire

Search 🔍

🛒
0 Items

Welcome, Charlotte Lighting
Your Account ⌄

All Categories | Lighting

Lighting

Lighting

Filter by

9 products found

Prices are 25% lower and end with .77

Relevance ▾

Price

max ▴▾   min ▴▾   Filter

Brand

☐ Baddeck Worldwide (3)

☐ Glomor Lighting (3)

☐ Pirini Inc. (3)

Compact Fluorescent Bulb
$11.77

Medium-base Chandelier Bulb
$2.77

Standard Incandescent Bulb
$2.77

Dual-tube Ultraviolet Bulb
$12.77

Screw-in LED Bulb
$10.77

Halogen Floodlight Bulb
$13.77

Candelabra Incandescent Bulb
$5.77

Linear Fluorescent Bulb
$28.77