

# 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

The screenshot shows the Sapphire website's user interface. At the top, there's a search bar and a 'Sign In / Register' link. Below this, a blue navigation bar contains 'All Categories', 'Fasteners', and 'Lighting'. The main content area is divided into two sections: 'Sign In' and 'Register'. The 'Sign In' section includes a 'Ligon ID' field, a 'Password' field, a 'Forgot your password?' link, and a 'Sign In' button. The 'Register' section has two options: 'Register a Buyer' (with a subtext 'Add a buyer within an existing organization') and 'Register an Organization' (with a subtext 'Add a new organization, and an administrator account'). An arrow points to the 'Register an Organization' button. Above the 'Register' section, there's a link that says 'Click here to register a new organization'.

3. Complete the form with the following information:
  - a. **Organization Name:** Charlotte Lighting Company
  - b. **Email:** [info@charlight.com](mailto: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](mailto:info@charlight.com)
  - l. **Password:** passw0rd
  - m. **Verify Password:** passw0rd
  - n. **Use Same Address as Organization:** Check Box (Yes)

1 Register your organization — 2 Register an administrator

### Organization Registration

Organization Name

Email  Phone (optional)

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Address Details

Address line 1

[Add Address Line 2](#)

Zip Code/ Postal Code  State / Province

City  Country

[Back](#) [Next, register an administrator](#)

1 Register your organization — 2 Register an administrator

### Register an administrator

Lgion Id

First Name  Last Name

Email  Phone (optional)

Password  Verify Password

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Address Details ☒ Use same address as organization

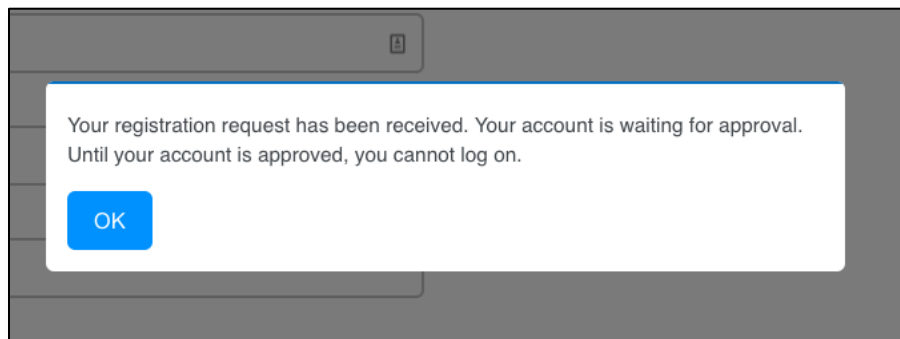
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Account Preferences

Preferred Language  Preferred Currency

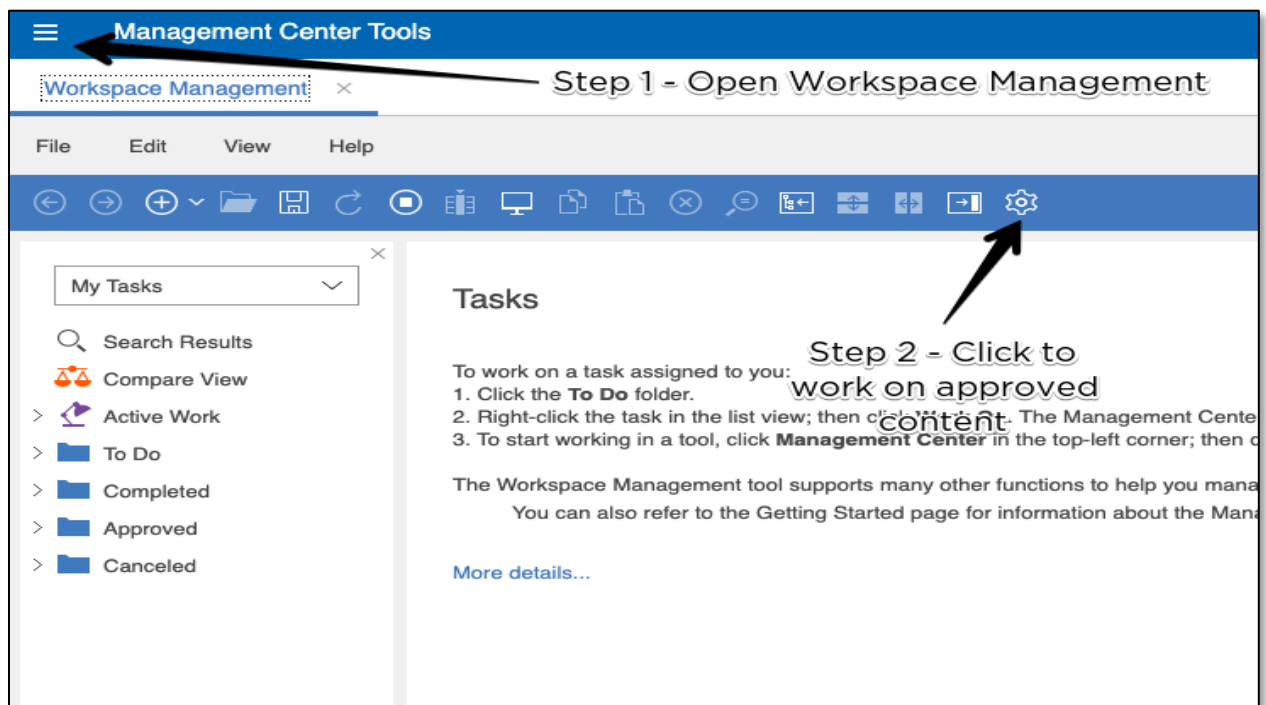
[Back](#) [Complete Registration](#)

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

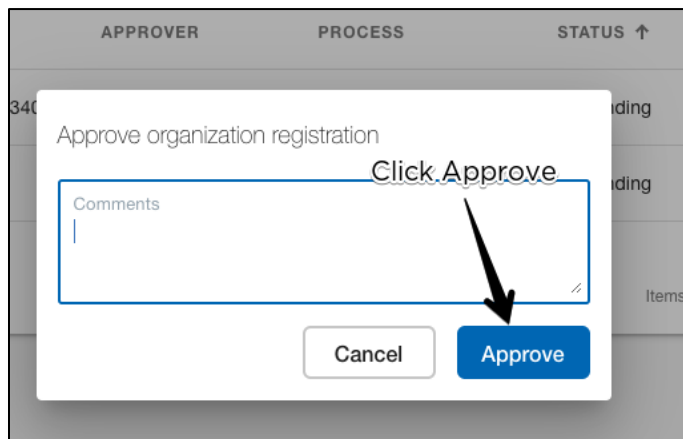


### Step 3 – Approve Organization

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



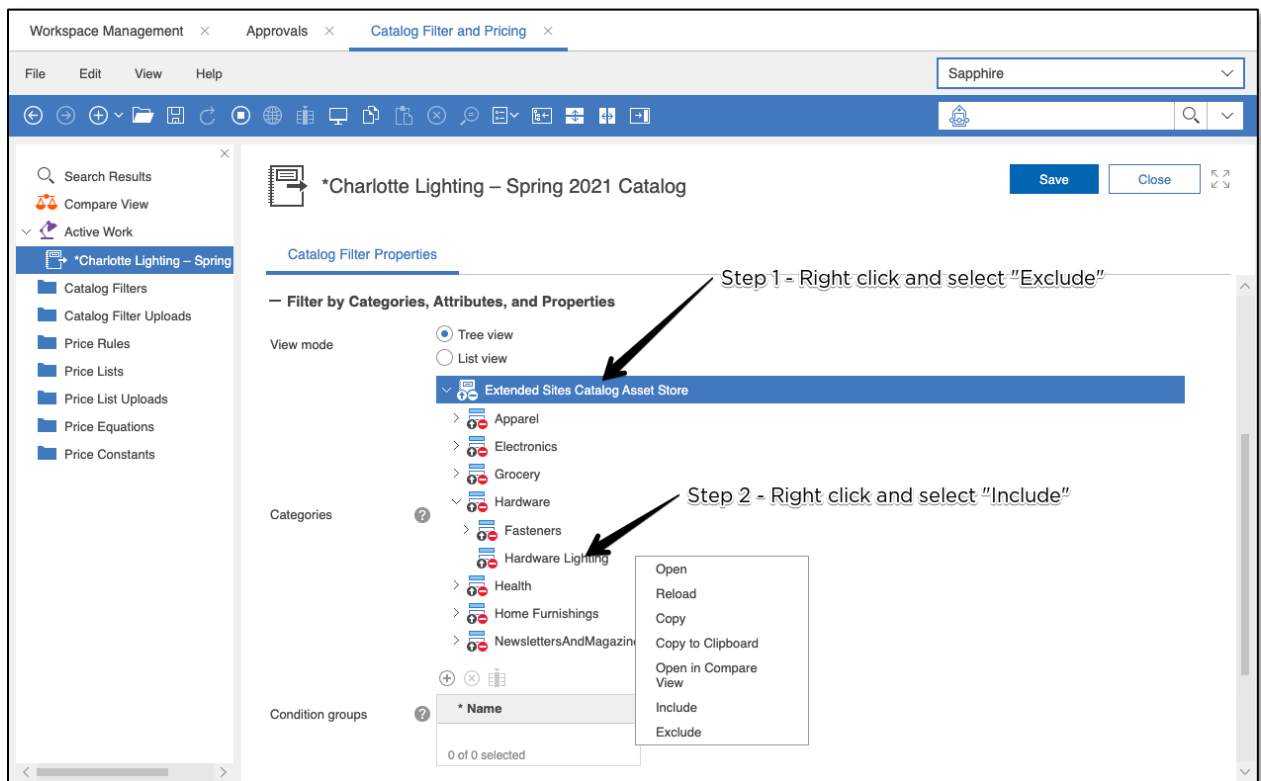
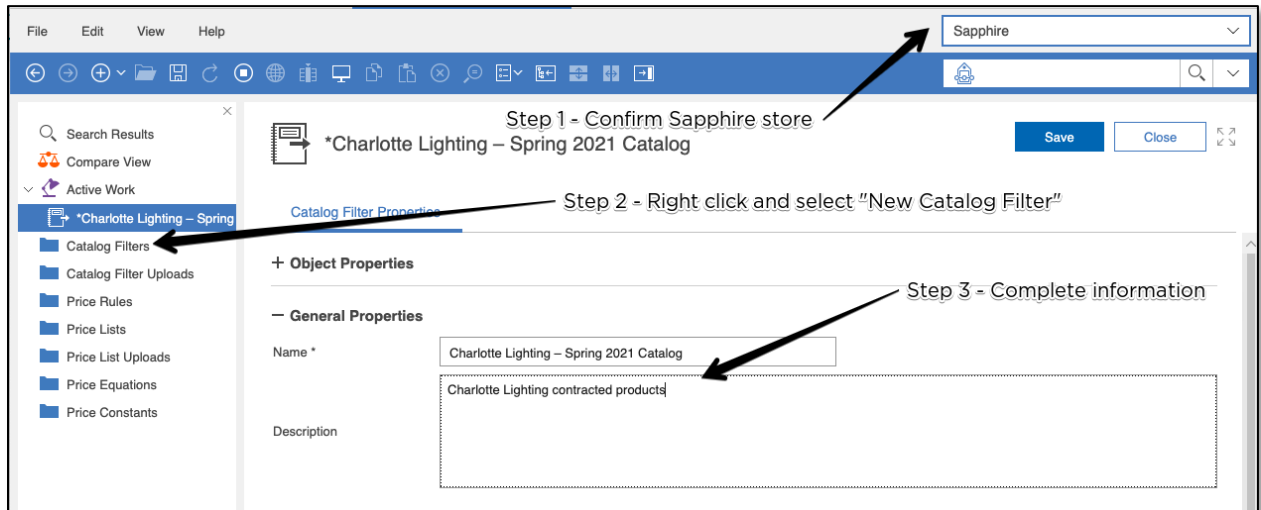
3. Menu > Manage Organizations > Approvals
  - a. Click on checkmarks to approve both the Organization and the User
  - b. Click Approve on the window – no comments needed



### 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:

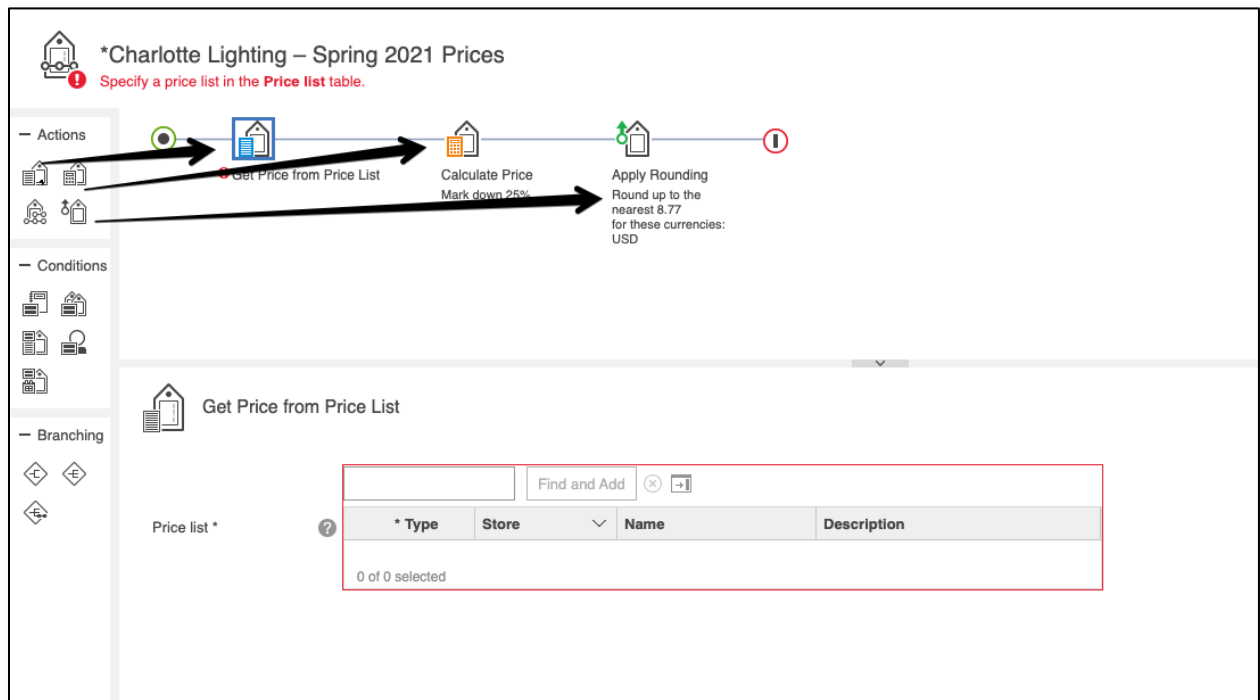
- i. **Name:** Charlotte Lighting – Spring 2021 Catalog
- ii. **Description:** Charlotte Lighting contracted products
- iii. **Filter By Categories, Attributes, and Properties**
  1. Expand category tree
  2. Right click on Extended Sites Catalog Asset Store and select “Exclude”
  3. Expand Hardware, right click on Hardware Lighting and select “Include”
- d. Save > Close



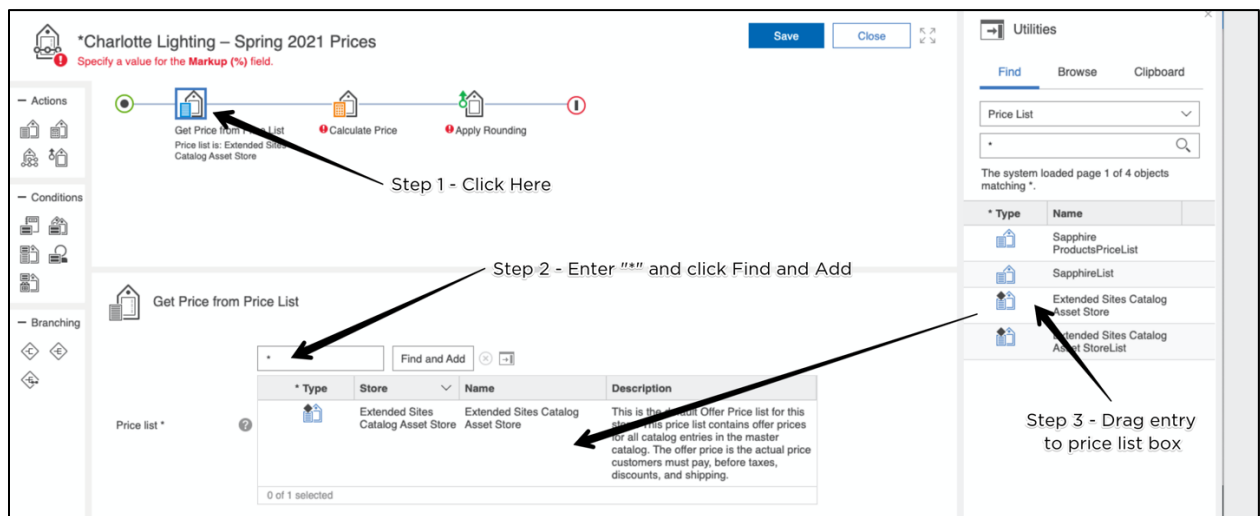
## Step 5 – Create Price Rule

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%

**\*Charlotte Lighting – Spring 2021 Prices** Save Close

*Specify a rounding pattern in the **Rounding patterns** table.*

**Actions:**

- Get Price from Price List  
Price list is: Extended Sites  
Catalog Asset Store
- Calculate Price  
Mark down 25%
- Apply Rounding

**Conditions:**

**Branching:**

**Calculate Price**

Options

- ☐ Mark up price
- ☒ Mark down price
- ☐ Use an existing price equation

Markdown (%) \*

25

Step 1 - Click Here

Step 2 - Select "Mark down price"

Step 3 - Enter "25"

5. Select "Apply Rounding" Action
  - a. Click checkbox for USD
  - b. Enter "'.77' for the pattern

**\*Charlotte Lighting – Spring 2021 Prices** Save Close

**Actions:**

- Get Price from Price List  
Price list is: Extended Sites  
Catalog Asset Store
- Calculate Price  
Mark down 25%
- Apply Rounding  
Round up to the nearest \*.77 for these currencies: USD

**Conditions:**

**Branching:**

**Apply Rounding**

Applicable currencies

USD	EUR	CAD	CNY	EUR	GBP	JPY	KRW	PLN	RON	RUB	TWD
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1 of 1 selected

Rounding patterns

* Pattern
<input checked="" type="checkbox"/> *.77

1 of 1 selected

Step 1 - Click Here

Step 2 - Click Checkbof for USD

Step 3 - Enter "'.77'"

6. Click Save and Close

## Step 6 – Create New Account

1. Menu > Manage Accounts > Accounts and Contracts
2. Click "New"

Accounts

CUSTOMER ↑	CONTRACTS	ACTIONS
Buyer A Organization	1	<div>Step 1 - Click New</div> <div></div>
Buyer B Organization	1	<div></div>
Sapphire BaseContracts	1	<div></div>

Items per page: 10 1 - 3 of 3

### 3. Complete form with following information

#### a. Account Details

- Organization:** Charlotte Lighting Company
- Click Next

New account

1 Account details

Organization

Charlotte Lighting Company

Contact (optional)

Contact information (optional)

Comments (optional)

☐ Customers can purchase under the terms and conditions of the store's default contract.
 ☐ This account is for base contracts.

Next

#### b. Purchase Order

- Click Next

#### c. Credit Line

- Click Next

#### d. Payment and Billing

- i. Check the following check boxes
  1. Customer's personal address book
  2. Customer's 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

Accounts

Search  Store filter Sapphire  [New](#) 



CUSTOMER ↑	CONTRACTS	ACTIONS
<a href="#">Buyer A Organization</a>	1	 
<a href="#">Buyer B Organization</a>	1	 
<a href="#">Charlotte Lighting Company</a>	0	 
<a href="#">Sapphire BaseContracts</a>	1	 

Items per page: 10 1 – 4 of 4 < >

Step 1 - Click Here

2. Click New

Accounts > Contracts for Charlotte Lighting Company

Search  ☐ Show filters [New](#) [Import](#) 

NAME ↑	DESCRIPTION	STATUS	CREATE DATE	ACTIONS
--------	-------------	--------	-------------	---------

Items per page: 10 0 of 0 < >

Step 1 - Click Here

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

Contracts

New contract Cancel Finish

1 Contract details

Name  
Charlotte Lighting - Spring 2021 Contract

Description

☒ Starts immediately ☒ No expiry date

Start date  End date

Base contract (optional)

Comments (optional)

Next

**b. Participants**

- i. **Available Organizations:** Charlotte Lighting Company
- ii. Click Next

Contracts

New contract Cancel Finish

✓ Contract details

2 Participants (optional)

AVAILABLE ORGANIZATIONS

Search  
Search

☒ Charlotte Lighting Company

SELECTED ORGANIZATIONS

Charlotte Lighting Company

**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

New contract
Cancel
Finish

✓ Contract details

✓ Participants (optional)

3 Catalog filter and price rule (optional)

Catalog filter
Charlotte Lighting – Spring 2021 Pri...
× Clear

Price rule
Charlotte Lighting - Spring 2021 Pri...
× Clear

Back
Next

4 Payment and billing (optional)

5 Shipping (optional)

6 Order approval (optional)

#### 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

New contract
Cancel
Finish

✓ Contract details

✓ Participants (optional)

✓ Catalog filter and price rule (optional)

4 Payment and billing (optional)

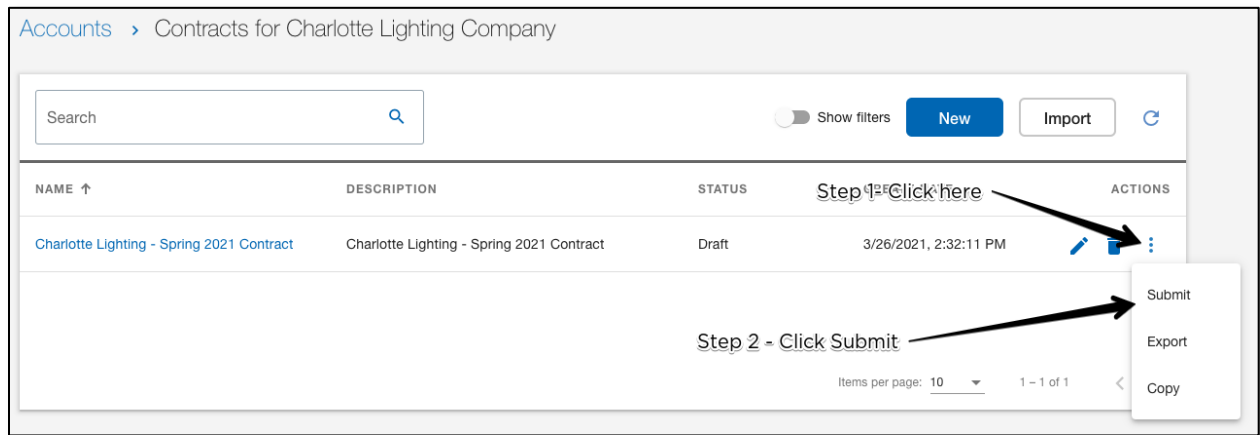
New

PAYMENT METHOD	DESCRIPTION	BILLING ADDRESS	ACTIONS
If the billing address is not predefined, the customer can select an address from the following address books:			
<input checked="" type="checkbox"/>	Customer's personal address book		
<input checked="" type="checkbox"/>	Customer's parent organization's address book		
<input type="checkbox"/>	Customer's business account organization's address book		

Back
Next

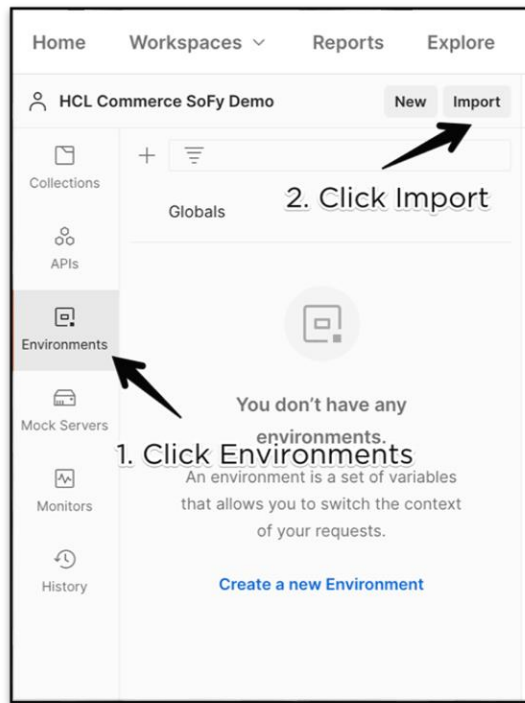
**e. Shipping**

- 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



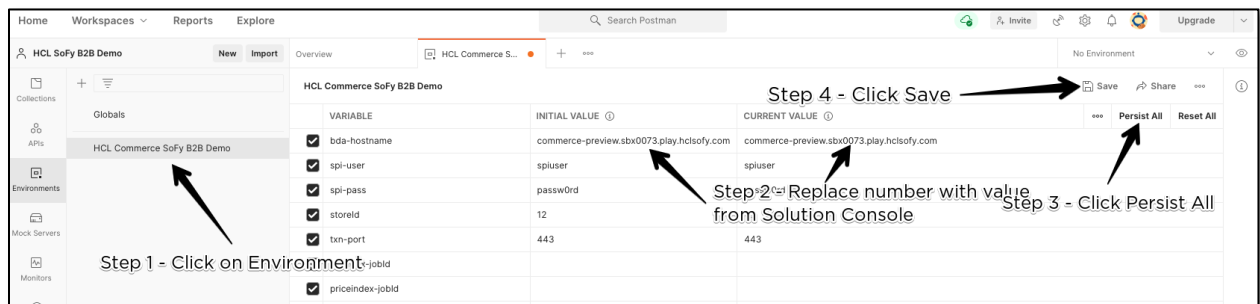
## Step 8 – Update Catalog and Pricing Information

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



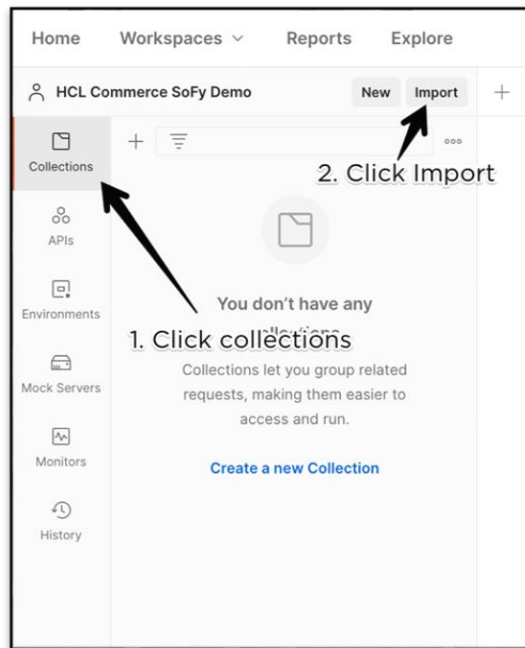
### 3. Update “bda-hostname” variable

- Click on “HCL Commerce SoFy B2B Demo”
- Update the current value of “bda-hostname” by replacing the number values with the number shown on your SoFy Solutions Console
- Click Persist All
- Click Save



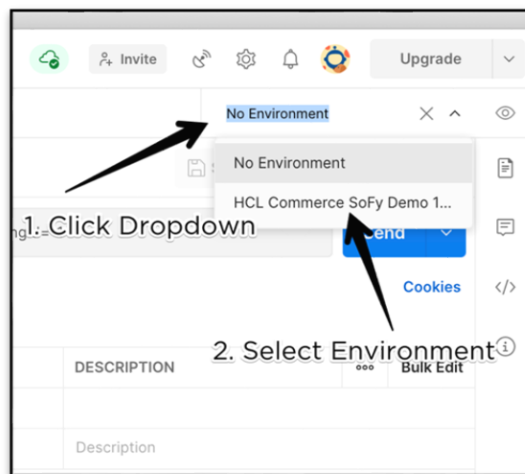
### 4. Import API Collection into the workspace

- Select Collections > Import
- Click “Upload Files” and select the “HCL Commerce SoFy B2B Demo - API Collection.json” or drag file into the window
- Click Import



## 5. Run API Collection

- From the collections area, click “HCL Commerce SoFy B2B Demo” to expand APIs
- On the right side, click on “No Environment” and select “HCL Commerce SoFy B2B Demo” from the dropdown menu



- Select “SoFy Sapphire Full Index Build” API > Click “Send” > Verify results
  - Call will return data to confirm the build has started by returning a jobStatusId value

**Step 1 - Select API**

**Step 2 - Click Send**

**Step 3 - Verify jobStatusId value is returned**

POST `https://(bda-hostname):((txn-port))/wcs/resources/admin/index/dataimport/build?connectorId=auth.reindex&storeId=((storeId))`

Params Authorization Headers (10) Body Pre-request Script Tests Settings

Query Params

KEY	VALUE	DESCRIPTION
<input checked="" type="checkbox"/> connectorId	auth.reindex	
<input checked="" type="checkbox"/> storeId	((storeId))	
Key	Value	Description

Body Cookies (1) Headers (10) Test Results

Status: 202 Accepted Time: 397 ms Size: 414 B Save Response

```

1 {
2   "jobStatusId": "1003"
3 }

```

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

**Step 1 - Click on API**

**Step 2 - Click Send**

**Step 3 - Verify job completed successfully**

GET `https://(bda-hostname):((txn-port))/wcs/resources/admin/index/dataimport/status?jobStatusId=((fullindex-jobid))`

Params Authorization Headers (9) Body Pre-request Script Tests Settings

Query Params

KEY	VALUE	DESCRIPTION
<input checked="" type="checkbox"/> jobStatusId	((fullindex-jobid))	
Key	Value	Description

Body Cookies (2) Headers (9) Test Results

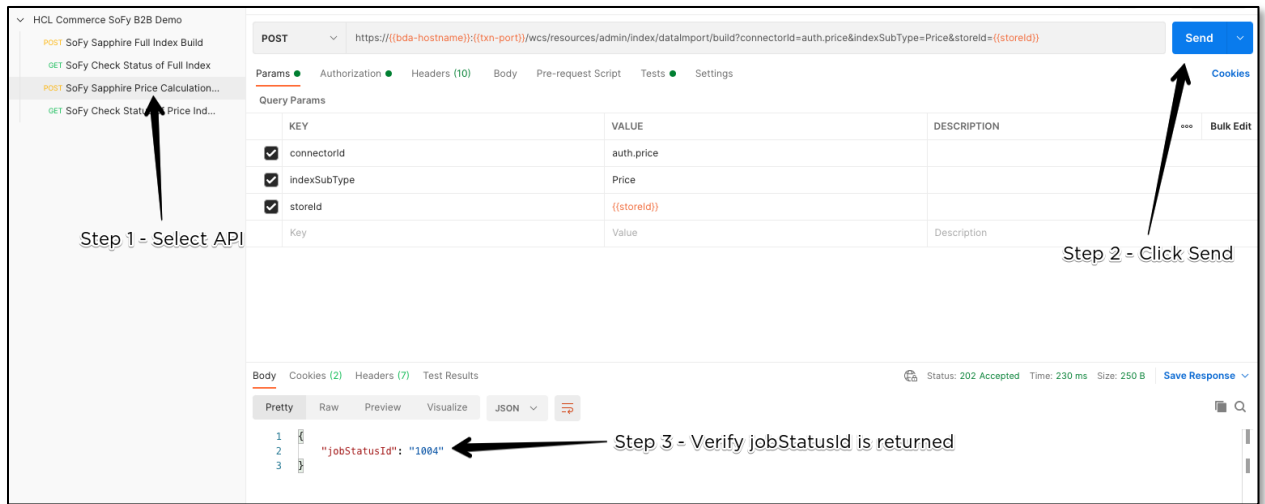
Status: 200 OK Time: 268 ms Size: 638 B Save Response

```

1 {
2   "status": {
3     "finishTime": "2021-03-26 18:58:53.643817",
4     "lastUpdate": "2021-03-26 18:58:53.643817",
5     "progress": "100%",
6     "jobStatusId": "1003",
7     "startTime": "2021-03-26 18:53:46.257676",
8     "runId": "4d637d99-f301-499c-a909-0727a9f11795",
9     "message": "Ingest job finished successfully for storeId: 12.",
10    "jobType": "SearchIndex",
11    "properties": "[{storeId=12, connectorId=auth.reindex}]",
12    "status": "0"
13  }
14 }

```

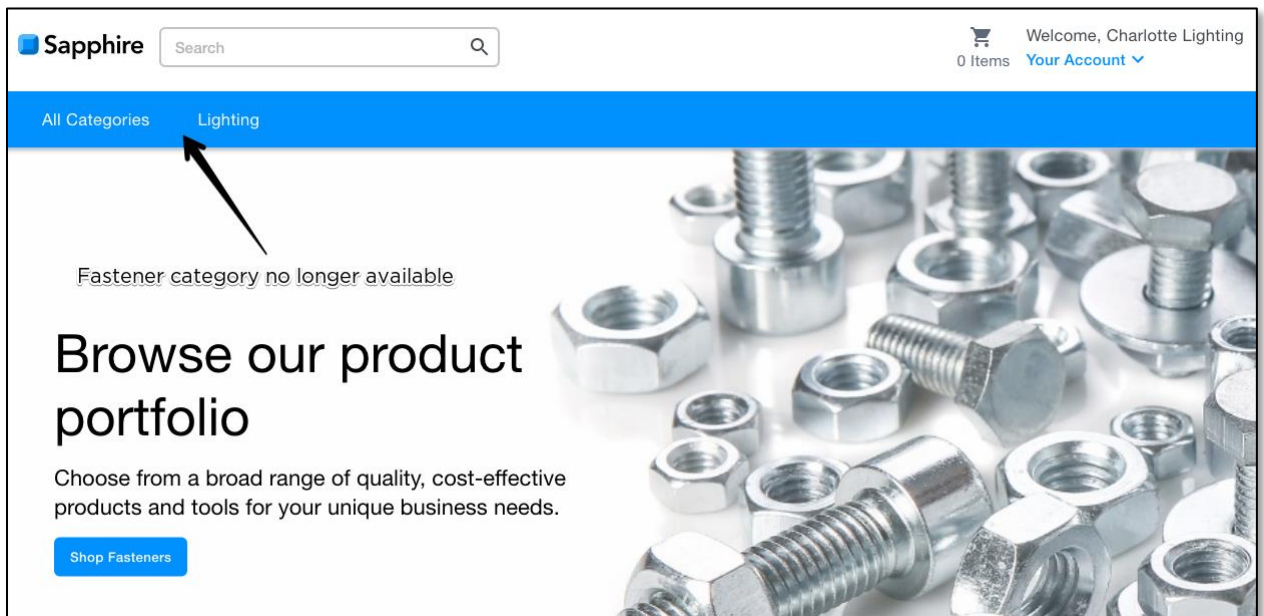
- e. Select “SoFy Sapphire Price Calculation” API > Click “Send” > Verify results
- Call will return data to confirm the build has started by returning a jobStatusId value



- f. Select “SoFi 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 SoFi Solution Console link
2. Click on Sign button at top right of screen
  - a. Login using cladadmin | 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



## Filter by

## Price

max ▾

min ▾

Filter

## Brand

☐ Baddeck Worldwide (3)☐ Glomor Lighting (3)☐ Pirini Inc. (3)

9 products found

Prices are 25% lower and  
end with .77

Relevance ▾

Compact  
Fluorescent Bulb  
\$11.77Medium-base  
Chandelier Bulb  
\$2.77Standard  
Incandescent  
Bulb  
\$2.77Dual-tube  
Ultraviolet Bulb  
\$12.77Screw-in LED  
Bulb  
\$10.77Halogen  
Floodlight Bulb  
\$13.77Candelabra  
Incandescent  
Bulb  
\$5.77Linear  
Fluorescent Bulb  
\$28.77