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

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Workspace Management \times	Step 1 - Open Workspace Management
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My Tasks ✓ Search Results Compare View Active Work Active Work Completed Approved 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 o'co'ntent. The Management Center 3. To start working in a tool, click Management Center in the top-left corner; then o'co'ntent. 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 "EmeraldSA" 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 "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 up Emerald Storefront 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 showin
- 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 up Emerald Storefront link from the SoFy Solution Console link
- 2. Past link in browser and replace Emerald with csr
- 3. Login to Customer Service Hub using csrUser | passw0rd
- 4. Select Emerald store
- 5. Click on Customer Search
- 6. Enter the customer email address (testuser@hcl.com) in Logon ID box and click Search
- 7. Click on Actions > Customer Details
- 8. Click on Shop For This Customer 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"
- 9. Click on shopping cart menu item > view full cart
- 10. Click on "Twin Bunk Bed" item in the cart
 - a. Verify the Save 20% on Bedroom promotion text is showing
- 11. Go to Beds > Sleep Head Low Key Double Bed
 - a. Verify the Save 20% on Bedroom promotion text is showing
- 12. Click on shopping cart menu item > view full cart
- 13. Click on delete for Twin Bunk Bed item
 - a. Click Yes on message
 - b. Click Delete again
- 14. Confirm that 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 users 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

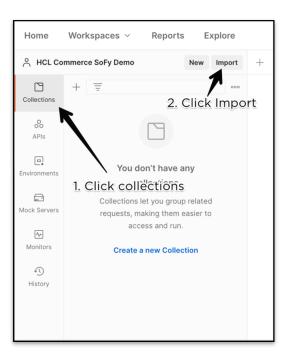
- 1. Open Postman
- 2. Import Environment JSON into the workspace
 - a. Select Environments > Import
 - b. Click "Upload Files" and select the "HCL Commerce SoFy CSR Demo -Environment.json" or drag file into the window
 - c. Click Import

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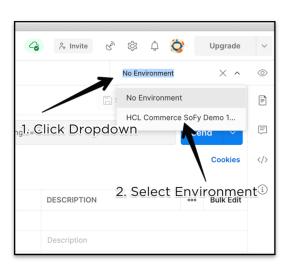
- 3. Update "bda-hostname" variable
 - a. Click on "HCL Commerce SoFy CSR Demo"
 - b. Update the current value of "sofy-hostname" by replacing the number values with the number shown on your SoFy Solutions Console
 - c. Verify that the csrUserId and csrPassword values are the same as what was created earlier
 - d. Update the customerEmail value to be the same as the customer that was created
 - e. Click Persist All
 - f. Click Save

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- 4. Import API Collection into the workspace
  - a. Select Collections > Import
  - b. Click "Upload Files" and select the "HCL Commerce SoFy CSR 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 CSR Demo" to expand APIs
  - b. Click on "Find Customer by LogonId" API
  - c. On the right side, click on "No Environment" and select "HCL Commerce SoFy CSR Demo" from the dropdown menu



- d. Run 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
  - i. Verify that the order comments is now showing for the order

