

SFCC Business Manager Extension

Version 1.0.0

User Guide

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1. Summary

This cartridge introduces several new capabilities to the Salesforce Commerce Cloud (SFCC) Business Manager, providing users with new and robust functionality with a refreshed and modern user interface.

Users will now have access to highly productive, streamlined Business Manager capabilities to better support customers and business planning.

2. Compatibility

The cartridge is tested and works with compatibility modes 18.10 or more.

3. Use Cases

This cartridge can be used as a business manager extension to add new features and extend the currently available functionalities in SFCC BM.

This cartridge adds the following, new features:

3.1. OCI Data Management Interface

Take control of your inventory with a GUI-driven tool, enabling users to add, modify, and delete records effortlessly.

3.2. CSV Import & Export

Effortlessly manage your data with flexible CSV file handling, simplifying the import and export processes.

3.3. Automatic Notifications

Stay informed with customizable notifications for various events, from campaign expirations to interval-specific alerts for orders.

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3.4. Coupon Replicator

Streamline your marketing efforts by replicating system-generated coupon codes and multiple codes across multiple sites, ensuring unified promotions.

3.5. Customer Product Lists Displaying

Explore and manage products within customer lists, facilitating personalized interactions and streamlined catalog management.

3.6. Job Execution Report

Gain valuable insights into job performance, enhancing resource management, and preventing bottlenecks.

3.7. Page Designer Export

Simplify collaboration and backup processes by exporting entire pages, including components and layouts, in XML format.



4. Installation Guide

4.1. Install Cartridge

Import the bm_itg_extension cartridge into your code workspace. Please take the following steps to import the cartridge into Eclipse UX Studio Workspace:

- 1. Open **UX Studio** in **Eclipse IDE**.
- 2. Go to File > Import > General > Existing Projects into Workspace
- 3. Browse to the directory where the cartridges have been downloaded.
- 4. Click Finish.
- 5. Click OK, when prompted to link the cartridges to the sandbox.

4.2. Import Data

- 1. Compress **site_import** folder to **site_import.zip**.
- 2. Log in to the Business Manager.
- 3. Click Administration > Site Development > Site Import & Export.
- 4. Use the upload control to browse for the **site_import.zip** file.
- 5. Click Upload.
- 6. Select the **site_import.zip** and click Import. Import should be completed successfully.
- 7. The imported file will include the following:
 - a. Jobs
 - b. Services
 - c. Site Preferences
 - d. Custom Object Types

4.3. Cartridge Setup

- Make sure that the 'bm_itg_extension' cartridge is imported into your code workspace (UX Studio, VS Code, etc...).
- Add 'bm_itg_extension' cartridge in the BM cartridge path by going to Administration
 Sites > Manage Sites > Business Manager Settings

4.4. Open Commerce API (OCAPI) Setup

This is only needed if you are going to enable any of the following features: **Page Designer Export**, **CSV Import & Export**, **Coupon Replicator**, **Automatic Notifications**, or **Job Execution Report**.

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- 1. Ensure that the BM Extension services have been imported by navigating to Administration > Operations > Services. Verify that both "bmextension.ocapi.auth" and "bmextension.ocapi.rest.all" services are created.
- 2. Configure **OCAPI** credentials under the Credentials tab in "bmextension.ocapi.auth.credentials"
 - a. Use the following service URL regardless of the environment: "https://account.demandware.com/dw/oauth2/access_token".
 - b. Enter Account Manager API credentials (Client ID & Secret) for OCAPI.
 - c. Do not modify the service names.
- 3. In Account Manager, ensure that the Client ID setup has Token Endpoint Auth Method set to "client_secret_post" and Access Token Format set to "JWT".
- 4. Setup OCPAI Settings:
 - a. Log in to the Business Manager.
 - b. Navigate to Administration > Site Development > Open Commerce API Settings.
 - c. Select Type -> Data.
 - d. Select Context -> Global.
 - e. Use the following snippet as your client's permission set, replace "client_id" with your own Client ID. Note, if you already have Open Commerce API Settings configured on your instance, e.g. for other API keys, you have to merge this permission set into the existing list of permission sets for the other clients.

```
" v": "23.2",
"clients": [
 "client_id": "client_id",
 "resources": [
    "resource_id": "/jobs/*/executions",
   "methods": ["post"],
   "read_attributes": "(**)",
    "write_attributes": "(**)"
   },
```

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```
"resource_id": "/jobs/*/executions/*",
     "methods": ["get"],
     "read_attributes": "(**)"
   },
    "resource_id": "/job_execution_search",
     "methods": ["post"],
    "read_attributes": "(**)",
     "write attributes": "(**)"
   },
     "resource_id": "/sites/*/coupon_search",
     "methods": ["post"],
     "read_attributes": "(**)",
     "write_attributes": "(**)"
    },
     "resource_id": "/sites/*/coupons/*",
     "methods": ["get"],
    "read attributes": "(**)"
    },
     "resource_id": "/sites/*/campaign_search",
    "methods": ["post"],
     "read attributes": "(**)",
     "write attributes": "(**)"
    },
     "resource_id": "/inventory_lists",
     "methods": ["get"],
     "read attributes": "(**)"
     "resource id":
"/system_object_definitions/*/attribute_definitions",
     "methods": ["get"],
     "read_attributes": "(**)"
    }
```

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```
]
]
]
}
```

5. Following is a screenshot for your reference:

Administration > Site Development > Open Commerce API Settings

Open Commerce API Settings

This page allows you to make client application-specific configurations of Open Commerce API resources, i.e. manage resource access privileges, attrib wide). Please note that due to caching, changes may take up to three minutes to become effective.

You can browse the Open Commerce API here API Explorer.

```
Select Type: Data
                                 ~
                                                                        Select Context: Global (organization-wide) ✔
     " v": "23.2",
     "clients": [
                "client_id": "
                "resources": [
                           "resource_id": "/jobs/*/executions",
                           "methods": [
"post"
                           "read_attributes": "(**)",
                           "write attributes": "(**)"
                           "resource_id": "/jobs/*/executions/*",
                           "methods": [
                                "get"
                           "read_attributes": "(**)"
                           "resource_id": "/job_execution_search",
                           "methods": [
                                "post"
                           read_attributes": "(**)"
```

4.5. "BM Extension Configuration" Enablement

This is a configuration page that allows you to configure the following:

- 1. The site preferences for the cartridge.
- 2. Data Mappings for **CSV Import & Export** feature.
- 3. To set up OCI Inventory Management.

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To enable this page, follow these steps:

- 1. Log into Business Manager.
- 2. Navigate to Administration > Organization > Roles & Permissions.
- 3. Select the **Role** to give access to. e.g., **Administrator**.
- 4. Go to the Business Manager Modules section.
- 5. Under **Site Preferences**, ensure that **BM Extension Configuration** is checked. Note that the context should be set to **Site**.

4.6. Features Enablement

4.6.1. OCI Inventory Management

Below are the prerequisites for enabling **OCI Inventory Management** feature:

- 1. Ensure that the site import step (4.2) is performed.
- 2. Generate a **Client ID** with the correct roles and permissions.
- 3. Import site preferences as part of step (4.2).

To enable the **OCI Inventory Management** feature, follow these steps:

- 1. Provide Business Manager Roles & Permissions
 - a. Log into Business Manager.
 - b. Navigate to **Administration > Organization > Roles & Permissions**.
 - c. Select the Role to give access to. e.g., Administrator.
 - d. Go to the **Business Manager Modules** section.
 - e. Under **Products and Catalogs**, ensure that the **OCI Inventory** is checked. Note that the context should be set to **Site**.
- Ensure that the BM Extension services have been imported by navigating to Administration > Operations > Services. Verify that both "bmextension.oci.auth" and "bmextension.oci.rest.all" services are created.
- 3. Configure **OCI** credentials under the Credentials tab in

"bmextension.oci.auth.credentials"

- a. Use the following service URL regardless of the environment: "https://account.demandware.com/dw/oauth2/access_token".
- b. Enter Account Manager API credentials (Client ID & Secret) for OCI.
- c. Do not modify the service names.
- 4. In Account Manager, please take the following steps:

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- a. Ensure that the Client ID has the correct roles assigned for the desired SFCC environment: "Sandbox API User" and "Salesforce Commerce API".
- b. Confirm that the **Client ID** has the required allowed scopes.

sfcc.inventory.impex-graphs sfcc.inventory.availability sfcc.inventory.availability.rw

- c. Ensure that the Client ID setup has Token Endpoint Auth Method set to "client_secret_post" and Access Token Format set to "JWT".
- 5. Next, configure the **OCI Inventory** related settings:
 - a. Log into Business Manager.
 - b. Select the desired site from the dropdown.
 - c. Navigate to Merchant Tools > Site Preferences > BM Extension Configuration.
 - d. Fill in the following settings:
 - i. Realm ID: Fetch from Administration > Site Development > Salesforce
 Commerce API Settings. Extract from the Organization ID value
 "f_ecom_[REALM-ID]_[INSTANCE-ID]". See the below screenshot.
 - ii. Instance ID: Fetch from Administration > Site Development > Salesforce Commerce API Settings. Extract from the Organization ID value "f_ecom_[REALM-ID]_[INSTANCE-ID]". See the below screenshot.
 - iii. **Short Code**: Fetch from Administration > Site Development > Salesforce Commerce API Settings. See the below screenshot.

Administration > Site Development > Salesforce Commerce API Settings



iv. **Organization ID**: This is the Tenant Group ID. Fetch from Administration > Global Preferences > Cross Cloud Trust. See the below screenshot:

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Administration >	Global Preferences > Cross Cloud Trust
Tenant Group	Peer to Peer
Tenant Grou	up Linkage Tenant Group ID
Key	Value
Super Tenant	
Tenant Group	CommerceGroup (
Last Modified	
Disconnect	

- 6. In the OCI Inventory settings page, sync SFCC with OCI by clicking on the "Sync" action under the "OCI Inventory Synchronize Locations and Location Groups" section.
- 7. Wait until the synchronization process completes. Do not close the page until the process finishes. This step needs to be done only once during plugin installation and whenever changes are made to the location graph in OCI.

Once these steps are completed, the **OCI Inventory Management** feature should be ready to use. A new menu item will appear under the **Products and Catalogs** BM Menu. Ensure that the prerequisite steps are performed before proceeding with these instructions.

4.6.2. Page Designer Export

Below are the prerequisites for enabling the **Page Designer Export** feature:

- 1. Ensure that the site import step (4.2) is performed.
- 2. Ensure that the OCAPI configuration step (4.4) is performed.

To enable the **Page Designer Export** feature, follow these steps:

- 1. Provide Business Manager Roles & Permissions
 - a. Log into Business Manager.
 - b. Navigate to **Administration > Organization > Roles & Permissions**.
 - c. Select the **Role** to give access to. e.g., **Administrator**.
 - d. Go to the Business Manager Modules section.
 - e. Under **Content**, ensure that **Targeted Page Export** is checked. Note that the context should be set to **Site**.

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- Ensure that the BM Extension jobs have been imported by navigating to Administration > Operations > Jobs. Verify that the "BM Extension Page Designer Export" job is created. DO NOT modify the ID or configuration for this job.
- Ensure that the corresponding OCAPI permissions are set by navigating to
 Administration > Site Development > Open Commerce API Settings. Select Type as Data
 & Context as Global. The following permissions are required to be set:
 - a. [READ & WRITE Access] {POST /jobs/*/executions}.
 - b. [READ Access only] {GET /jobs/*/executions/*}.
 - c. [READ & WRITE Access] {POST /job_execution_search}.

Once these steps are completed, the **Page Designer Export** feature should be ready to use. A new menu item will appear under the **Content** BM Menu. Ensure that the prerequisite steps are performed before proceeding with these instructions.

4.6.3. Customer Product Lists Displaying

To enable the **Customer Product Lists Displaying** feature, follow these steps:

- 1. Log into Business Manager.
- 2. Navigate to Administration > Organization > Roles & Permissions.
- 3. Select the **Role** to give access to. e.g., **Administrator**.
- 4. Go to the **Business Manager Modules** section.
- 5. Under **Customers**, ensure that **Customer Product Lists** is checked. Note that the context should be set to **Site**.

Once these steps are completed, the **Customer Product Lists Displaying** feature should be ready to use. A new menu item will appear under the **Customers** BM Menu.

4.6.4. CSV Import & Export

Below are the prerequisites for enabling the CSV Import & Export feature:

- 1. Ensure that the site import step (4.2) is performed.
- 2. Ensure that the OCAPI configuration step (4.4) is performed.
- 3. Import custom object definitions as part of step (4.2).

To enable the **CSV Import & Export** feature, follow these steps:

- 1. Provide Business Manager Roles & Permissions
 - a. Log into Business Manager.

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- b. Navigate to Administration > Organization > Roles & Permissions.
- c. Select the **Role** to give access to. e.g., **Administrator**.
- d. Go to the **Business Manager Modules** section.
- e. Under **Products and Catalogs**, ensure that **CSV Import & Export** is checked. Note that the context should be set to **Site**.
- Ensure that the BM Extension jobs have been imported by navigating to Administration > Operations > Jobs. Verify that "BM Extension CSV Import Export" job is created. DO NOT modify the ID or configuration for this job.
- 3. Ensure that the corresponding OCAPI permissions are set by navigating to Administration > Site Development > Open Commerce API Settings. Select Type as Data & Context as Global. The following permissions are required to be set:
 - a. [READ & WRITE Access] {POST /jobs/*/executions}.
 - b. [READ Access only] {GET /jobs/*/executions/*}.
 - c. [READ & WRITE Access] {POST /job_execution_search}.
 - d. [READ Access only] {GET /inventory_lists}.
 - e. [READ Access only] {GET /system_object_definitions/*/attribute_definitions}.

Once these steps are completed, the **CSV Import & Export** feature should be ready to use. A New menu item will appear under the **Products and Catalogs** BM Menu. Ensure that the prerequisite steps are performed before proceeding with these instructions.

4.6.5. Coupon Replicator

Below are the prerequisites for enabling the Coupon Replicator feature:

- 1. Ensure that the site import step (4.2) is performed.
- 2. Ensure that the OCAPI configuration step (4.4) is performed.

To enable the **Coupon Replicator** feature, follow these steps:

- 1. Provide Business Manager Roles & Permissions
 - a. Log into Business Manager.
 - b. Navigate to Administration > Organization > Roles & Permissions.
 - c. Select the **Role** to give access to. e.g., **Administrator**.
 - d. Go to the **Business Manager Modules** section.
 - e. Under **Online Marketing**, ensure that the **Coupon Replicator** is checked. Note that the context should be set to **Site**.

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- Ensure that the BM Extension jobs have been imported by navigating to Administration
 Operations > Jobs. Verify that both "BM Extension Coupon Replicator: Producer" and
 "BM Extension Coupon Replicator: Consumer" jobs are created. DO NOT modify IDs or
 configurations for these jobs.
- Ensure that the corresponding OCAPI permissions are set by navigating to
 Administration > Site Development > Open Commerce API Settings. Select Type as Data
 & Context as Global. The following permissions are required to be set:
 - a. [READ & WRITE Access] {POST /jobs/*/executions}.
 - b. [READ Access only] {GET /jobs/*/executions/*}.
 - c. [READ & WRITE Access] {POST /job_execution_search}.
 - d. [READ & WRITE Access] {POST /sites/*/coupon_search}.
 - e. [READ Access only] {GET /sites/*/coupons/*}.

Once these steps are completed, the **Coupon Replicator** feature should be ready to use. A new menu item will appear under the **Online Marketing** BM Menu. Ensure that the prerequisite steps are performed before proceeding with these instructions.

4.6.6. Job Execution Report

Below are the prerequisites for enabling the **Job Execution Report** feature:

- 1. Ensure that the site import step (4.2) is performed.
- 2. Ensure that the OCAPI configuration step (4.4) is performed.

To enable the **Job Execution Report** feature, follow these steps:

- 1. Provide Business Manager Roles & Permissions
 - a. Log into Business Manager.
 - b. Navigate to Administration > Organization > Roles & Permissions.
 - c. Select the **Role** to give access to. e.g., **Administrator**.
 - d. Go to the **Business Manager Modules** section.
 - e. Under **Operations**, ensure that the **Job Execution Report** is checked. Note that the context should be set to **Organization**.
- Ensure that the corresponding OCAPI permissions are set by navigating to
 Administration > Site Development > Open Commerce API Settings. Select Type as Data
 & Context as Global. The following permissions are required to be set:
 - a. [READ & WRITE Access] {POST /job_execution_search}.

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Once these steps are completed, the **Job Execution Report** feature should be ready to use. New menu items will appear under the corresponding BM Menu. Ensure that the prerequisite steps are performed before proceeding with these instructions.

4.6.7. Automatic Notifications

Below are the prerequisites for enabling the **Automatic Notifications** feature:

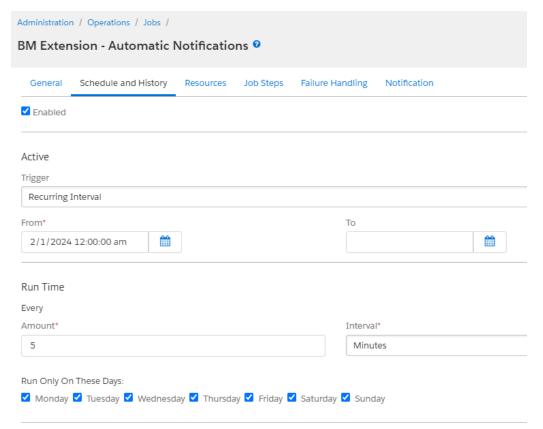
- 1. Ensure that the site import step (4.2) is performed.
- 2. Ensure that the OCAPI configuration step (4.4) is performed.
- 3. Import custom object definitions as part of step (4.2).

To enable the **Automatic Notifications** feature, follow these steps:

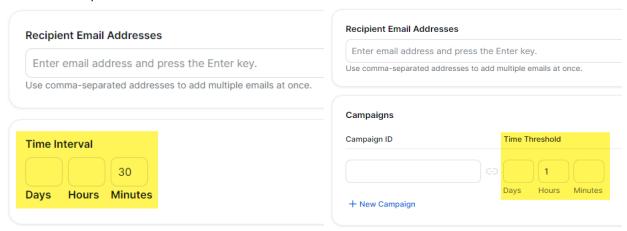
- 1. Provide Business Manager Roles & Permissions
 - a. Log into Business Manager.
 - b. Navigate to Administration > Organization > Roles & Permissions.
 - c. Select the Role to give access to. e.g., Administrator.
 - d. Go to the Business Manager Modules.
 - Under Ordering, ensure that Order Notifications is checked. Note that the context should be set to Site.
 - ii. Under **Products and Catalogs**, ensure that **OOS Notification** is checked. Note that the context should be set to **Site**.
 - iii. Under **Online Marketing**, ensure that **Expired Campaigns Notification** is checked. Note that the context should be set to **Site**.
- Ensure that the BM Extension jobs have been imported by navigating to Administration
 Operations > Jobs. Verify that "BM Extension Automatic Notifications" job is created.
 DO NOT modify the ID or configuration for this job.

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This job is by default scheduled to be 5 minutes recurring. Feel free to change this schedule to be at your convenience and note that this will impact the notification sending time thresholds that are being set in the notification settings. For example, if the default schedule is used (the recurring 5 minutes), then the time thresholds are not recommended to be lower than 5 minutes. If the schedule is set to be 1 hr recurring, then ensure you don't use time thresholds less than 1 hr, and so on.



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- Ensure that the corresponding OCAPI permissions are set by navigating to
 Administration > Site Development > Open Commerce API Settings. Select Type as Data
 & Context as Global. The following permissions are required to be set:
 - a. [READ & WRITE Access] {POST /sites/*/campaign_search}.

Once these steps are completed, the **Automatic Notifications** feature should be ready to use. New menu items will appear under the corresponding BM Menu. Ensure that the prerequisite steps are performed before proceeding with these instructions.

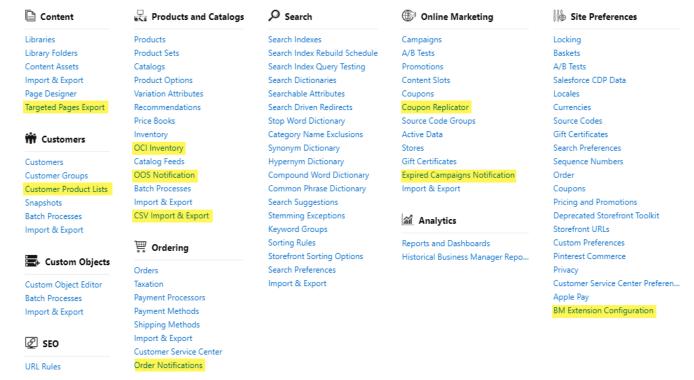
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4.7. Features Placement in BM Menus

New menu items should appear under the corresponding BM Menu. Refer to the below screenshots.

> In the Merchant Tools menu:



> In the Administration menu:



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5. Support & Help

If you need any assistance or encounter any issues while using the cartridge, please reach out to our team at salesforce@itgsoftware.com.

6. Release History				
Date	Version	Description		
03/03/2024	1.0.0	Initial Release		

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