cloudcraze

COMMERCE ON SALESFORCE

TRAINING GUIDE

FUNCTIONAL EXERCISES

CloudCraze Functional Exercise Guide
Winter 2018
CloudCraze version 4.8

The exercises contained in this book are designed to teach anyone who will be using or implementing CloudCraze the primary configuration principles of the platform and how they apply to administering a CloudCraze eCommerce storefront.

After completing this guide you will know:

- How CloudCraze and Salesforce are related.
- How to grant customers access to specific pricing and product availability through configuration.
- How to administer and configure certain User Interface elements of a CloudCraze storefront.
- How to configure a CloudCraze storefront to offer your customers the option to browse in multiple languages and currencies.
- And much more!

A range of job functions will use the exercises in this book. The most effective way to understand the full scope of the platform is of course to go through the entire set of exercises. To help users who only need to know the basics, exercises have been grouped into two personas - **Admin** and **Functional Expert**. The Table of Contents on the next page has a key to explain the exercise track for each persona. The first page of each exercise is also clearly marked with which personas it is designed for.

CloudCraze training is broken into sections, chapters, and exercises. Sections contain chapters which cover similar topics. Each chapter revolves around a single concept or piece of functionality in CloudCraze. The exercises in each chapter cover how to configure the storefront to meet the objective presented on the chapter cover sheet.

Every chapter has a cover sheet to provide context around the functionality that is explained within it. Some chapters require you to have completed earlier exercises to build upon those previous concepts. These are marked in the Pre-Requisites section on the cover page.

Table of Contents

Persona Key

- Admin - Covers the basics of maintaining any CC storefront.
- Functional Expert - Covers the full range of functionality available in CloudCraze.

Intro to CC Admin and the CloudCraze Interface

Learning Objective…

By the end of this exercise you should be able to navigate through CloudCraze and understand what CC Admin will be used for.

Exercise is for…

Admins

Functional Experts

Pre-Requisites…

- None

Objects Used…

- None

In this exercise we will familiarize ourselves with the layout of the CloudCraze administrative screen. We will also walk through a bit about how CloudCraze and Salesforce communities are interrelated.

Throughout this entire training book, we will strive to delineate between anything that is Salesforce functionality and anything that is specific to CloudCraze. It will be helpful for you to identify where Salesforce ends and CloudCraze begins as we progress.

Anyone who will be administering or managing any aspects of the storefront should be familiar with where to go to access different functionality, so that they can quickly and efficiently make necessary changes.

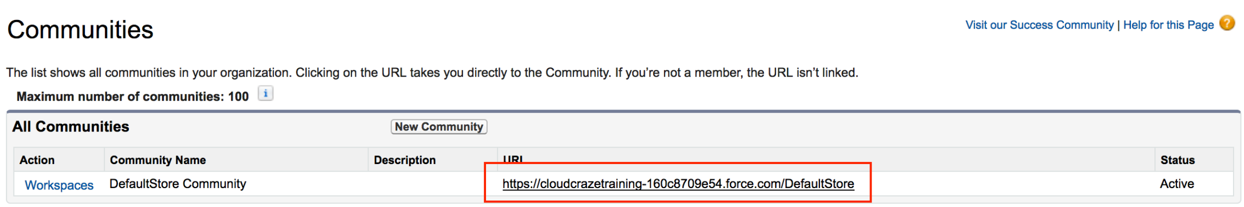
If you are familiar with Salesforce, it will be a bit easier to get started and you will likely have a good understanding of how to find things even if you're not sure exactly where to find them. However, for even the most seasoned Salesforce admin, there are pieces of CloudCraze which are unique that you will not have seen in Salesforce before.

Each exercise will go through steps to configure some piece of functionality and will then explain how to test what you setup in the storefront. When viewing the storefront and testing the user experience, it is important to draw a distinction between testing what anonymous users will see versus what a logged-in, or authenticated, user will see.

There are three ways to get to the storefront. We will begin with the Anonymous experience. When testing the anonymous experience, we will want to browse in a separate browser (or a private window) from where we are configuring, to avoid potential interference from cookies.

CC Exercise: Get into the storefront anonymously

1. In your Salesforce training environment, navigate to the **Setup** screen.
2. In the left panel, search for **All Communities** (Tip: Don't press enter! Simply typing in this box will filter the navigation item options you see here).
3. Copy the URL that you see and paste it in a different web browser or a private browser window.



This anonymous experience is what the general public will see when coming to the site. Via configuration, we can disallow anonymous checkout by forcing a user to login before being able to proceed through the checkout process, or can turn off anonymous browsing altogether and force users to log in before they see any products.

Salesforce Communities allow for administrators and internal employees to see the community experience exactly as a specific user would see it, invoking the same permissions and entitlements that the user has access to. We will use this same functionality to test the storefront experience for certain contacts. Our test contact for this first exercise is Mr. Marc Benioff.

CC Exercise: Log in to Community as User

1. In your Salesforce training environment, navigate to the **Contacts** tab.
2. Find the contact record for **Marc Benioff.**
3. At the top of this contact record, select the dropdown labeled 'Manage External User' and click **Log in to Customer as User.**

Again, getting to the storefront in this way shows the exact experience Marc will see. This is useful to be sure we are granting customers access to the proper products and pricing. It can also be useful for browsing as the customer and making purchases on their behalf.

The third way of getting to the storefront is via the CSR Flow button on the contact record. Navigating to the storefront via this button is similar to using the Log in to Community as User method, but it uses the permissions of the internal Salesforce user, rather than the contact we are browsing as. Because CloudCraze recognizes we are browsing in the context of CSR Flow, we can hide or show certain things on the storefront. For instance, if Customer Service Representatives need to be able to make price adjustments, we can show adjustment fields on the storefront that customers will not see. If they should not be able to place orders, we can allow them to build carts but hide the checkout button.

CC Exercise: CSR Flow

1. In your Salesforce training environment, navigate to the **Contacts** tab.
2. Find the contact record for **Marc Benioff.**
3. At the top of the contact record, Click **CSR Flow** and select the storefront to log in to.

Salesforce provides the ability to adjust record layouts, to hide or show different fields and lookups on an object. We will need to adjust the Contact and Account layouts to show the commerce activity for each.

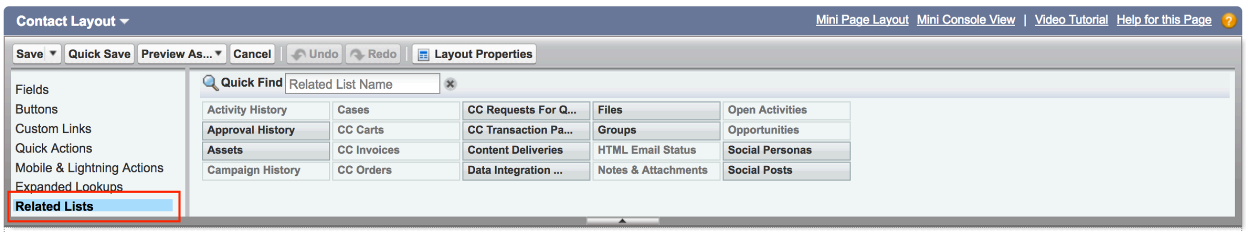
CC Exercise: Adjust Related Lists on Contact and Account

1. In your Salesforce training environment, navigate to the **Contacts** tab.

2. Find the contact record for **Marc Benioff.**

3. On the right side of the screen, click the arrow to display the pop out menu. Click **Edit Layout.**

4. In the left section at the top of the screen, select **Related Lists.**



5. Drag **CC Orders, CC Carts,** and **CC Invoices** and from this box into the layout.

Click **Save.**

Repeat these steps to add the related lists for CC Orders and CC Invoices to the Account record. By dragging these related lists into the view from any Contact or Account, the related list data will display appropriately across all records for both of these objects.

Themes in CloudCraze dictate the color scheme and look and feel of the storefront. When we were viewing the storefront earlier, this was utilizing a theme with almost no styling. The exercises in this book are written in the context of a fictional company called Industrio Solutions. In this exercise we will apply a theme that uses Industrio's branding.

CC Exercise: Set Storefront Theme

1. In your Salesforce training environment, navigate to the **CC Admin** tab.

2. Go to the **DefaultStore settings** by clicking the dropdown next to the Global Settings button.

3. Select **Themes** at the bottom of the left hand navigation.

4. Click **Enable** next to the **CC_Theme_Industrio** theme.

Next we will need to rebuild our **configuration cache.** A configuration cache is a collection of settings that dictate the behavior of CloudCraze. Configuration caches are built Globally.

5. Return to the **Global Settings.**

6. Select the **Configuration Cache Management** tab in the left nav.

7. Click **Build New.** **O**nly click it once and give this some time to build.

8. You will have to click the **Refresh List** button to see the progress being made on your new config cache being built. Once it is done, you will see buttons next to it to **Activate** it or **Remove** it.

9. Click Activate once this is done building.

Return to the storefront and verify that you're seeing the newly branded look and feel. In addition to changing the theme, we can use configuration settings to hide or display different widgets on the storefront and change the way certain things function. While looking at the storefront, you'll notice there are actually two search fields. Since they are both used for the same thing, Industrio wants to hide the one contained in the widget and only display the header search field to customers.

> **CC Admin** is an important tool that we will use to configure various functionality and aspects of the storefront. We can configure things to be either **Global Settings** or at **Storefront Settings.** To navigate to the Global settings at any time, click the Global Settings button, or click the CC Admin tab again. To setup any storefront specific settings, use the dropdown by the Global Settings button to select the appropriate storefront.

CC Exercise: Hide Search Widget with Configuration Settings

1. In your Salesforce training environment, navigate to the **CC Admin** tab.

2. Go to the **DefaultStore settings** by clicking the dropdown next to the Global Settings button.

3. Select the **Configuration Settings** tab in the left hand navigation.

4. In the picklist for **Module**, select **Search Box.** This will show us only those settings that affect the Search Box widget.

5. Click the **Override** button on the **Enabled** configuration**.**

6. In the Modal that opens, replace the **TRUE** value with **FALSE** (Configuration setting text values are case sensitive).

7. Return to the Global Settings, build a new configuration cache, and activate it.

- **Configuration Settings** that are configured Globally will be marked as such in the Storefront column. By clicking the override button in the left column of any row, we can override the global setting and create a storefront specific setting.
- We can even create Page specific settings to display or hide widgets on different pages in a storefront.

Now return to the storefront and make sure that the Search widget is no longer showing on any pages.

CC Admin and the CloudCraze administrative interface provide powerful tools to administer and fine tune the customer experience on the storefront. In the proceeding exercises we will dive deeper into how to use the out-of-the-box features and functionality in CloudCraze to manage the eCommerce site.

Accounts, Contacts, and Enabling a User

Learning Objective…

By the end of this exercise you will know how to enable a user from an existing Contact record.

Exercise is for…

Admins

Functional Experts

Pre-Requisites…

- Understand how to navigate Salesforce

Objects Used…

- Accounts
- Contacts
- Users

In this exercise you will learn how to enable a user from a contact record. Once enabled, this user will be able to login and browse the storefront.

Customers who expect to be able to log into the storefront, browse products, and view the My Account section will need to have a user in Salesforce. These user records must be tied to a contact record.

For implementations that allow external users to register on the storefront, an account, contact, and user record are created at the time of registration. For implementations that do not allow external registration or guest checkout, the steps for enabling a user in this exercise will be the only way to grant customers access to your storefront.

For a storefront that allows anonymous users to browse the storefront and buy products without registering, that anonymous shopping experience is still dictated by a user. These users are browsing as the guest user for the community.

To complete this exercise, we will enable a user from an existing contact, Howard Jones, on the Acme account.

Accounts, Contacts, and Users are all standard objects in Salesforce. Contact records are used to represent individuals at an account. We create a User record for anyone that will be accessing data in the Salesforce org.

Contacts are typically used to represent and track information about individuals who are external to an organization while user records are created to grant internal employees access to a company's Salesforce environment.

In the case of Salesforce Communities we also create users for people who will be accessing the community. A User's license type and profile determines what they have access to.

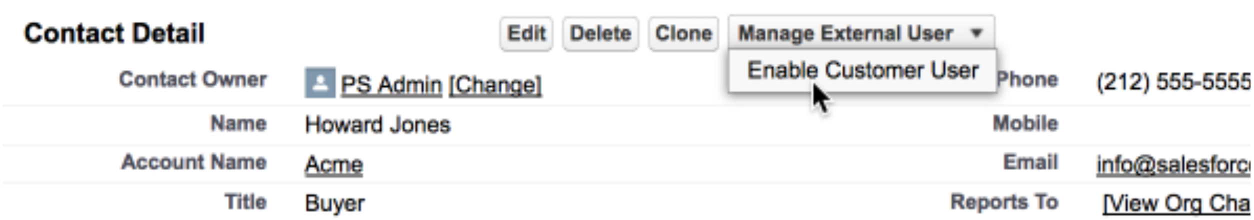
We can create a user record directly from a Contact record.

CC Exercise: Enable Howard Jones as a user from his contact record

1. In your CloudCraze training environment, navigate to the **Acme** account.

2. Select **Howard Jones** from the list of Contacts.

3. At the top of Howard Jones' Contact record, select the dropdown labeled 'Manage External User' and click **Enable Customer User.**



This will open the new page to create a user record. Much of the User information will be copied over from the Contact record and the two records will be linked.

4. Change the email address to your email address.

5. Change the Username to **howard.jones@acme.com**

6. Set the new user's license to **Customer Community.**

7. Set the profile to **CloudCraze Customer Community User.**

8. Set the user's currency to **USD.**

9. Leave the flag **‘Generate new password and notify user immediately’** selected at the bottom of this page.

Click **Save.**

We’ve now enabled Howard Jones as a user. You should receive an email notifying you that a user has been created for you, and inviting you to setup your password. If you don’t receive this email, navigate to the user record in Salesforce and click ‘Reset Password’ at the top of the page.

Click the link in this email and setup your password to get into the storefront.

Navigate to the Homepage and scroll down.

The expected behavior here is that you should be able to see the menu items and widgets in the right column on the storefront; however, you won’t see any products or the carousel of promotions on the homepage. This is because Howard Jones and the Acme account are not yet part of an account group.

In the next exercise, we will discuss what dictates the products and pricing that a customer will see on the storefront.

Account Group Entitlements

Learning Objective…

By the end of this exercise you should be able to explain how Account Groups and Price Lists determine the products and pricing an account sees on the storefront.

Exercise is for…

Admins

Functional Experts

Pre-Requisites…

- Have a user that we can browse to the storefront with

Objects Used…

- CC Account Groups

In the previous exercise we enabled a Salesforce contact as a user so they can now browse the storefront. This exercise will teach you how to grant customers access to different products and how to use account groups to determine the pricing they will see on the storefront.

Account Groups are the main driver of product and pricing entitlements on the CloudCraze platform. For a customer to be able to browse the storefront, their account must be in an account group.

We can also use account groups to offer specific customers a unique look and feel that they see when they login. For instance, if we want a customer to see their own logo when they login, we can create a single account group for this account and then assign a unique theme.

For this exercise, imagine that the executives at Industrio have recognized that some of their customers conduct large volumes of business with the company and have decided they'd like to begin offering these customers discounts on the products they are buying.

Acme is one of these premier customers, which are referred to as 'Tier 1.' Tier 1 customers receive access to an expanded product line and receive an additional discount on products. To complete this exercise we will create the Tier 1 Account Group and assign Acme as the first account to receive this special pricing.

We use a CC Account Group to tie Accounts to Price Lists. The price lists that are in an account group are the price lists that any account in that account group has access to. Entitlements are delivered at the account level. This means that any contact at a given account will have access to the same product and pricing selection as all other contacts at that account.

We can assign multiple price lists to a single account group. If the same product exists on more than one of those price lists, the price list selection method will determine which price for that product is shown on the storefront.

Since Howard Jones is a contact at the Acme account and we have already enabled him as a user, let's use him to test the experience that contacts at the Acme account will see when they navigate to the storefront.

Navigate to the storefront as Howard Jones, either by logging in directly on the storefront or clicking 'Login to Community as User' from the Howard Jones contact record. You should be seeing the menu items at the top of the page and several widgets down the right side.

To grant the Acme account access to products and meet Industrio's requirement of giving them Tier 1 pricing, we're going to create a new account group.

CC Exercise: Create the 'Tier 1' CC Account Group

1. In your CloudCraze training environment, navigate to the tab for the **CC Account Groups** object.

2. Set the dropdown by where it says 'View' to 'All' and click **Go!** to see a list of all existing Account Groups in this environment.

> Note: The 'Anonymous' and 'PortalAccount' Account Groups are the default account groups created as part of any new CloudCraze install.
>
> - **Anonymous** dictates the price lists that users who don't log in see while browsing
> - **PortalAccount** is where anyone who externally registers on the site will initially be assigned.

3. Click **New CC Account Group.**

4. Enter **Tier 1** for the Account Group Name.

5. In the Description field, enter **Tier 1 Pricing.**

6. Set PriceList Selection Method to **Best Price.**

7. Leave all other fields blank.

Click **Save.**

Note: There are two price list selection methods:

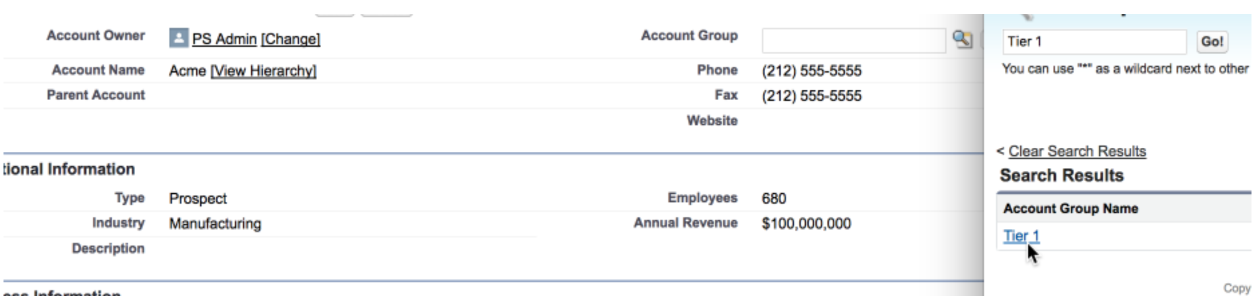
- **Best Price (more common) -** Looks at all price lists in this account group and selects the best price for each product to display on the storefront for accounts in this account group.
- **Sequence (less common) -** Looks at the Sequence number on each of the price lists in this account group, chooses the lowest sequence number and surfaces the products at the price defined on that price list first. The pricing engine then moves in sequential order through each price list, pulling in any products that didn't have a price defined on a previous price list.

We now have the Tier 1 Account Group created. Next we need to add our Accounts and Price Lists to this Account Group.

CC Exercise: Add Acme to the 'Tier 1' CC Account Group

1. Navigate to the **Acme** account.

2. Double click on **Account Group**, then click the magnifying glass to open the Lookup tool.



3. Search for Tier 1 in the Lookup tool modal that appears, and select it from the list of results.

Click **Save.**

Acme is now in the Tier 1 Account Group, but there are no Price Lists assigned to this Account Group yet. When giving an account group access to discounted price lists, we typically want to give them access to the base price list (which contains price list items at the MSRP) so they will always have access to the general catalogue. In your training environment, the base price list has been created for you and is called the **'Enterprise'** price list.

CC Exercise: Add Enterprise Price List to the 'Tier 1' CC Account Group

1. Navigate to the **Tier 1** CC Account Group.

2. In the related list for Account Group Price Lists, click **New CC Account Group Price List.**

3. Click the magnifying glass by the Pricelist field and search for **Enterprise.**

4. Choose the Enterprise price list from the list of returned results.

Click **Save.**

Since Acme is in the Tier 1 Account Group, the Acme account now has access to the Enterprise price list.

Return to the storefront as Howard Jones and refresh your page. You should now see products on the storefront, with Enterprise price list pricing.

Price Lists

Learning Objective…

By the end of this exercise you should be able to add products to price lists and how to perform a mass update to give a discount across all items on a price list.

Exercise is for…

Admins

Functional Experts

Pre-Requisites…

- Understand Account Groups

Objects Used…

- CC Price Lists
- CC Price List Items

After completing the previous exercise, you should now have an Account Group called Tier 1 which contains the Acme account. If you have enabled a contact on the Acme account, you should be able to login to the storefront as this user. In the last exercise we gave customers at the Acme account access to the Enterprise price list. The products and pricing these users see is MSRP.

This exercise will explain what a pricelist is within CloudCraze, as well as some details on how they are created and maintained. It will also discuss some of the ways we can use price lists to deliver different product and pricing entitlements to different accounts.

In CloudCraze, there are several ways of granting users access to products and offering different pricing on those products - account groups, price groups (also referred to as contract pricing), attribute driven commerce, and others. At the center of each is a CC Price List.

Industrio has decided that Tier 1 customers will receive a 20% discount on all products. In this exercise we will clone the Enterprise price list and apply a mass update to the price list to give the correct discount.

A CC Price List is a collection of **Price List Items.** A Price List Item links a product to a particular price list and defines the price of that product for that price list.

Price Lists are currency specific, meaning that if I want to offer a product in both Euros and US Dollars, I will need to have at least one unique price list in Euros, and one in US Dollars.

To give accounts in the Tier 1 price list access to products at a 20% discount from MSRP, we'll begin by cloning our Enterprise price list.

CC Exercise: Clone Enterprise Price List to create 20ALL Price List

1. Navigate to the **CC Price Lists** tab in your CloudCraze training environment.

2. Open the **Enterprise** price list. (Hint: You may need to click **Go!** to see the list of price lists that exist in your environment.)

3. Click the button that says **Clone** at the top of the page.
4. Name this new price list **20ALL.**

5. Set the Pricelist ID to **5**.

6. Make the description **20 percent off MSRP**.

7. Currency ISO Code should be set to **USD** and Customer Type Code should be **General**.

8. Make sure your start and end dates are valid.

Click **Save.**

9. Double click the **Storefront** field and move **DefaultStore** from the list of Available storefronts to the list of Chosen storefronts.

Click **Save.**

10. Scroll to the **Account Group Price Lists** section of the page. Since the Enterprise price list was assigned to the PortalAccount account group, this was carried over when we cloned the Enterprise price list. **Delete the association to the PortalAccount account group.**

We now have an exact clone of the Enterprise price list, in the 20ALL price list. We now need to apply a mass update to this price list to give a 20 percent discount on all of the prices defined on the 20All price list.

CC Exercise: Apply Mass Update to 20ALL Price List

1. While viewing the 20ALL price list, scroll to the **Mass Update** section of the page.

2. Enter **20** in the **Amount** field.

3. Set **Change Type** to **Deduct**.

4. Set **Change Code** to **Percent**.

Click **Save** and refresh the page to see the updates to the price list items**.**

The 20ALL price list now contains the products on the Enterprise price list at the discounted price that Industrio wishes to offer to its Tier 1 customers. All that's left is to assign this price list to the Tier 1 account group.

CC Exercise: Add the 20ALL Price List to the Tier 1 Account Group

1. Navigate to the Tier 1 Account Group.

2. In the related list for Account Group Price Lists, click **New CC Account Group Price List.**

3. Click the magnifying glass by the Pricelist field and search for **20ALL.**

4. Choose the **20ALL** price list from the list of returned results.

Click **Save.**

To ensure that you have configured this correctly, navigate to the storefront as Howard Jones and make sure the prices you are seeing are those defined on the 20ALL price list. (Hint: the HP ProLiant MicroServer - Athlon II Neo N36L 1.3 GHz is the first product displayed in the Spotlight Products section. The price of this product should be $263.99)

Product Types

Standard Products, Categories, and Specs

Learning Objective…

By the end of this exercise you will understand what is defined on a CC Product record, how to create a product, and will have an understanding of the objects that are related to the Product object.

Exercise is for…

Admins

Functional Experts

Pre-Requisites…

- Understanding of CC Price Lists and product entitlements

Objects Used…

- CC Products
- E_ProductMedia
- CC Related Products
- CC Categories
- CC Specs

We now have products showing up on our storefront and contacts at the Acme account can browse the site and see their special pricing. It's time to add a few more products to the site.

There are 6 types of products in CloudCraze:

- Standard Products
- Aggregated
- Bundles
- Kits
- Dynamic Kits
- Assembly

While each of these has some unique configuration requirements, at their core they are all made up of standard products.

On a CC Product record we can specify product information such as SKU, short and long description, shipping information and more. We can also associate different product media like product images or data sheets, define product specs, and associate our products to product categories.

Industrio has added a few printers to it's product line and wants to begin selling them to their Tier 1 customers on their eCommerce site. In this exercise, we will create 3 standard products - 2 printers and an ink cartridge - and assign these products to our 20ALL price list.

In this exercise, we're going to create 3 new products that will only be available to accounts in the Tier 1 account group. To create these products, use the table immediately following this first set of steps and repeat the steps for each product.

CC Exercise: Create 3 Standard Products

1. Click the **CC Products** tab in your CloudCraze training environment.
2. Click **Go!** to see all products in this org.
3. Click **New CC Product.**
4. Input the **Product Name** and **SKU.**
5. Leave Product Type as **Product.**
6. Set Product Status to **Released.**
7. Enter **Short Description** and **Long Description.**
8. Enter **Product Weight** and **Shipping Weight** in the Shipping Details section.

Click **Save.**

	HP Printer	Epson Printer	Ink Cartridge
Product Name	HP Officejet Pro 6230 ePrinter	Epson WorkForce 30 Printer	HP 934XL - black ink cartridge
SKU	3512797	1545486	3831811
Short Description	This ePrinter is designed for productivity and mobile printing to keep business moving-at work, home, or on the go.	The Epson WorkForce 30 blazes through critical documents at speeds about two times faster than those of competitive printers.	Count on durable prints from cartridges specially designed to work with your HP printer.
Long Description	Professional color documents and eye-catching marketing materials for business-for up to 50% less cost per page than lasers. Prints up to 18 pages per minute in black and 10 pages per minute in color.	Delivering laser quality text and brilliant color photos, it's the perfect addition to any home office. Its small, compact design, it fits in even the smallest work area.	Original HP high-yield ink cartridges are formulated to consistently produce professional-quality documents at a better value for frequent printing.
Product/Shipping Weight (lbs)	11/15	8.4/12	0.5/.75

Now that we've created these products, we need to add them to a price list. Since the requirement from Industrio is that these products are only available to Tier 1 customers, we're going to add them to only the 20ALL price list. Use the price listed for each product in the table immediately following this set of steps.

CC Exercise: Add Products to the 20ALL Pricelist

1. While looking at the product we want to add to the 20ALL price list, scroll to the related list for **Price List Items** and click **New CC Price List Item.**

2. Input **20ALL** in the Pricelist field. Use the lookup tool to search for the price list and select it.

3. Input the price specified for the product.

4. Make sure you start and end dates are valid. It's common to make the end date very far in the future to avoid it disappearing from the storefront unintentionally.

Click **Save.**

	HP Printer	Epson Printer	Ink Cartridge
Price	$79.99	$69.99	$16.99

Once we've added a price list item for each product, they should be available to members of the Tier 1 account group on the storefront. Navigate to the storefront as Howard Jones and verify that you can search of each of these products.

You should be seeing these products appear, but there are no images yet associated with them. Use the resources specified in the table immediately following this set of steps to complete the exercise. Repeat the steps to add all media to each product.

CC Exercise: Add Images and Product Media

1. While looking at the product we want to add Product Media to, scroll to the related list titled **E_ProductMedias** and click **New CC Product Media.**

2. Set the Media Type dropdown to the type specified in the table below.

3. Set Product Media Source to **URI.**

4. In the URI Field, input the URL specified for this media type.

Click **Save.**

HP Printer	**Product Image:** https://webobjects2.cdw.com/is/image/CDW/3512797 **Alternate Image 1:** https://webobjects2.cdw.com/is/image/CDW/3512797b **Alternate Image 2:** https://webobjects2.cdw.com/is/image/CDW/3512797c **Product Search:** https://webobjects2.cdw.com/is/image/CDW/3512797a **Product Thumbail:** https://webobjects2.cdw.com/is/image/CDW/3512797a **Datasheet:** http://media.flixcar.com/media/inpage/assetsv2/ HP-345796218-4aa4-2890enus.pdf
Epson Printer	**Product Image:** https://webobjects2.cdw.com/is/image/CDW/1545486 **Alternate Image 1:** https://webobjects2.cdw.com/is/image/CDW/1545486a **Alternate Image 2:** https://webobjects2.cdw.com/is/image/CDW/1545486c **Product Search:** https://webobjects2.cdw.com/is/image/CDW/1545486b **Product Thumbail:** https://webobjects2.cdw.com/is/image/CDW/1545486b
Ink Cartridge	**Product Image:** https://webobjects2.cdw.com/is/image/CDW/3531811 **Product Search:** https://webobjects2.cdw.com/is/image/CDW/3531811 **Product Thumbail:** https://webobjects2.cdw.com/is/image/CDW/3531811

Refresh the storefront and verify that you are seeing the images show up for each product.

Our products are now fully created and appearing on the storefront; however, we're only able to find them by searching for them. To help customers find them during normal browsing of the storefront, we'll want to add these products to categories.

Categories in CloudCraze exist as a large hierarchy, eventually rolling up to the same root category for the entire org - this category is called Products and has a Category ID of 0. Below this in the hierarchy is a Root Category for each storefront in your org. The categories below this storefront Root Category make up the category tree for that storefront. The Category ID of the storefront Root Category is specified in CC Admin so that CloudCraze knows which categories to use for each storefront.

The DefaultStore Root Category already exists in your training orgs. We're going to add three new categories in the DefaultStore category tree and add our new products to them. Use the data specified in the table immediately following these steps when creating these new categories.

CC Exercise: Create CC Categories and add Products to them

1. Click the **CC Categories** tab in your CloudCraze training environment.
2. Click **Go!** to see all categories that already exist in the org.
3. Click **New CC Category**.
4. Input the **Category Name, Category ID, Parent Category,** and **Sequence Number.**

Click **Save.**

Repeat these steps to create all three categories.

Category Name	Category ID	Parent Category	Sequence
Printers	p001	DefaultStoreRoot	900
HP	p002	Printers	100
Epson	p003	Printers	200

> You'll need to refresh the Category Index to see your Category changes on the storefront. You can find this in CC Admin | Indexing.

5. Navigate to the HP Printer we created earlier.
6. Scroll down to the **Product Categories** related list and click **New CC Product Category**.
7. Use the lookup tool by the Category field to select the **Printers** category.

Click **Save.**

8. Repeat these steps to add this product to the **HP** category as well. Add the Epson printer to the **Epson** and **Printers** categories, and the ink cartridge to the **HP** category.

Our products should now be findable in the category tree on the storefront. Navigate to the storefront and make sure your categories and products are showing up where you'd expect them to.

When viewing a category, we can help our customers refine the selection of products they're looking at using Faceted Search. Faceted Search allows the customer to filter by certain criteria and narrow the list of products in a particular category, or in the results of a keyword search. We use CC Specs to set up faceted search, as well as to display important information about our products on the product detail page. Use the data specified in the table immediately following these steps to first create a CC spec and then assign spec values for our products.

CC Exercise: Add CC Specs

1. Click the **CC Specs** tab in your CloudCraze training environment.
2. Click **Go!** to see all specs that already exist in the org.
3. Click **New CC Spec**.
4. Use the data in the table below to input the **Spec Name** and **Display Name.** These should match.
5. Check the boxes for **Can be Used for Filtering** (this makes this spec an available criteria for faceted search) and **Is Visible in Catalogue** (this makes this spec visible on the PDP).
6. Set the way this spec should be used for filtering based on the table below.
7. Set Locale to **en_US.**
8. Set Spec Group to **General.**

Click **Save.**

Repeat these steps to create the four specs in the table.

Spec	Filter
Sheet Capacity (sheets)	Slider
Energy Star	Checkbox
Print Speed	Checkbox
Resolution	Checkbox

CC Exercise: Assign Spec Values to Product

1. Click the **CC Products** tab in your CloudCraze training environment.
2. In Salesforce, navigate to the HP Printer we created earlier.
3. Scroll down to the **Product Spec** related list and click **New CC Product Spec**.
4. Use the lookup tool by the Spec field to select the **Sheet Capacity** spec.
5. Set the **SpecValue** to 225, as defined in the table below.

Click **Save.**

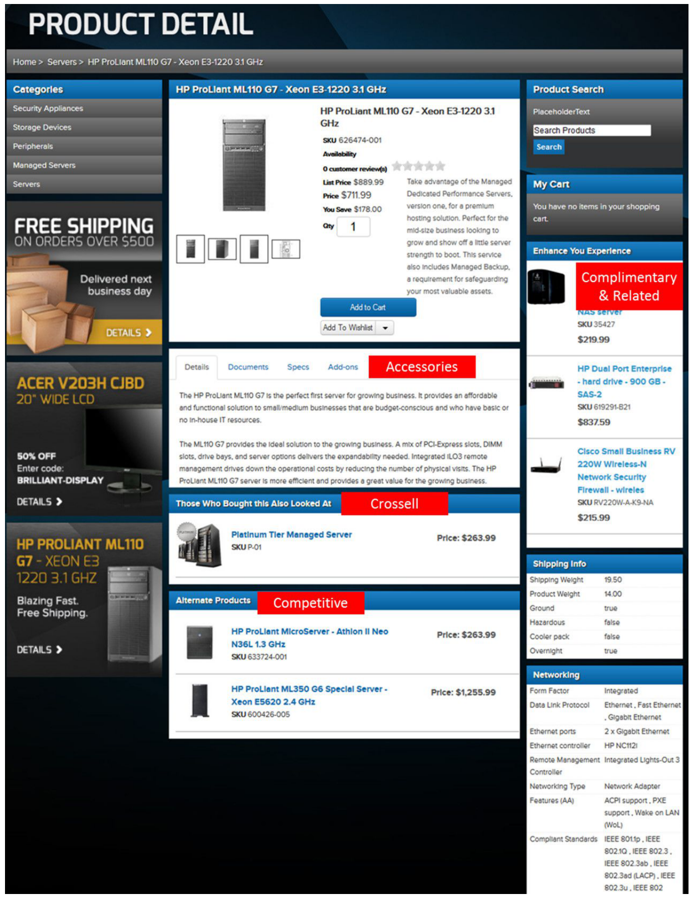
Repeat these steps to create Product Spec records for the remaining specs on the HP Printer and all four for the Epson Printer.

> You'll need to refresh the Spec Index to see your Spec changes on the storefront. You can find this in CC Admin | Indexing.

Spec	HP Printer	Epson Printer
Sheet Capacity (sheets)	225	100
Energy Star	Yes	Yes
Print Speed	18 ppm	38 ppm
Resolution	600 x 1200 dpi	5760 x 1440 dpi

Once you've refreshed the Spec Index, navigate to the Printers category on the storefront. If you added the two printers to this category earlier, you should see the faceted search options we just set up in the left column. You should also be able to navigate to the product detail page for either of the printers and see these specs in the Specs tab.

Our customers can now easily filter and sort through the product catalogue to find what they're looking for. Once customers land on these products, we want to show them other products they might be interested in. We use the Related Products object for this. There are several types of product relationships we can create, which are grouped appropriately on the storefront. The image below shows where each type of product relationship displays on the product detail page. You can add or remove additional related product types based on your needs. Use the table below the image to set up the related products for our HP Printer.



HP Printer Product Relationships	
Product	**Relationship**
HP 934XL - black ink cartridge	Accessory
Epson Printer	Competitive

CC Exercise: Related Products

1. Navigate to the HP Printer we created earlier.

2. Scroll down to the **Related Products** related list and click **New CC Related Product**.

3. Use the lookup tool by the Related Product field to select the product we're looking to relate to.

4. Set the **Related Product Type**, as defined in the table above.

Click **Save.**

Repeat the steps to add both related products in the table to the HP Printer.

Note: Setting up a product relationship only creates that relationship in one direction. In this exercise, associating products to the HP printer will cause those products to display on the product detail page for the HP printer but not vice versa. There are two related lists for Related Products on the product object so that we can see this relationship from both sides.

- **Related Products** shows us products that are related to and will display on the PDP for this product.
- **RelatedTo** shows us any products where the product we're viewing will displayed on the PDP.

Navigate to the storefront and find the HP Printer. Verify that the Epson Printer is in the Alternate Products widget and the Ink cartridge is in the Add Ons tab.

Product Types

Aggregated Products

Learning Objective…

By the end of this exercise you will understand how to create an aggregated product and sell different variations of the same product in a single PDP.

Exercise is for…

Functional Experts

Pre-Requisites…

- Standard Products
- Understanding of CC Price Lists and product entitlements

Objects Used…

- Composite Products

In the previous exercise, we created a few standard products and added them to a pricelist, so they're now on the storefront for any users that are entitled to them.

Products often come in variations and it doesn't always make sense to have separate product detail pages for those variations. For instance, if the same product comes in multiple colors (black, red, orange, etc.) or different sizes (small, medium, large, etc.), we want to give our customers an easy way of seeing and selecting the color they're looking for. This is what we use Aggregated Products for.

An aggregated product is used to surface multiple variations of the same product on a single Product Detail page. We'll do this by creating each variation, or each SKU, as it's own standard product, then configuring them to be a component of the Aggregated Product.

CloudBurst has been selling headphones on their storefront. The headphones the company sells come in three colors - black, red, and orange. CloudBurst has noticed that the black headphones (which are returned first in the search results for 'headphones') are by far their most popular version. A recent customer feedback survey revealed that most customers didn't realize the headphones were offered in other colors. To solve this, the company wants to present all three options in a single page.

In this exercise, we'll create the top level product (Panasonic Earphones) then associate each of the three colors of headphones to this product using the CC Composite Product object. These three standard products have been created for you. Use the information in the table following these steps to create the Panasonic Headphones product.

CC Exercise: Create the Top-Level Aggregated Product

1. Click the **CC Products** tab in your CloudCraze training environment.
2. Click **Go!** to see all products in this org.
3. Click **New CC Product.**
4. Input the **Product Name** and **SKU.**
5. Set the Product Type as **Aggregated.**
6. Set Product Status to **Released.**
7. Enter **Short Description** and **Long Description.**
8. Enter **Product Weight** and **Shipping Weight** in the Shipping Details section.

Click **Save.**

Aggregated Product Data	
Product Name	Panasonic Headphones
SKU	PanAgg001
Short Description	Noise isolating headphones provide a crisp sound. Available in three colors: Black, red, and orange.
Long Description	Comfortable, No Slip Fit. These headphones are available in three colors: Black, red, and orange. You won't believe your ears when you try these noise isolating headphones which provide a clear, crisp sound.
Product Weight (lbs)	0.5
Shipping Weight (lbs)	0.5
Price List Item	$0 on the Enterprise Price List
Product Media	**Product Image, Product Search Image, Product Thumbnail Image:** https://encrypted-tbn0.gstatic.com/images?q=tbn:ANd9GcR-F09ZHNoc2M9nIeBehRus6juVYEnbqCZeKsEeZZsHRouFGYeyOg

9. Add the product to the **Enterprise** Price List.

10. Create the three **Product Media** records for this product. Use the same URI for each, just be sure to set the media type appropriately. Hint: the clone button is well used here.

CC Exercise: Add Component Products

1. While viewing the Panasonic Headphones product we just created, scroll to the related list titled **Composite Products.**

2. Click **New CC Composite Product**.

3. Put a 1 in the **Quantity** field.

4. Use the lookup tool by the Component field to select the **Panasonic Black Headphones**.

Click **Save.**

Repeat the steps to add the **Panasonic Red Headphones** and **Panasonic Orange Headphones** as composite products of the Panasonic Headphones.

Note: Similarly to how there are two related lists for Related Products on the product object, there are two related lists for Composite Products object so that we can see this relationship from both sides. Components make up Composite Products.

- **Composite Products (Component)** shows us composite products that the product we're viewing is a component of.
- **Composite Products** shows us the component products that are included in the composite product we're viewing.

Navigate to the storefront and find the Panasonic Headphones product. Verify that you can select each of the three headphones from this one product detail page.

Product Bundle

Learning Objective…

By the end of this exercise you should be able to explain how to create a Bundle Product.

Exercise is for…

Functional Experts

Pre-Requisites…

- Before working through this exercise, you should be familiar with setting up simple products and adding them to price lists.

Objects Used…

- CC Products
- CC Pricelist
- CC Composite Products

A bundle is a grouping of two or more Standard products (SKUs) grouped together and sold as a single product.

Customers often want to buy products that work in conjunction with one another. The bundle configuration gives us the ability to present customers with the option to buy these products that work together as a group at a lower price than they would cost to purchase separately.

The configuration of a kit is similar to a bundle but the way the two are priced is different. The price of the bundle is independent of the items within the bundle and the bundle as a whole is priced as a single unit; whereas, the price of a kit is the roll-up sum of the products making it up.

Industrio wants to encourage customers to buy ink when they buy a new printer. The product marketing team has decided to offer a Printer and Ink Bundle that gives customers a discounted price when they purchase the two together, with the thought that this will increase sales of each.

First, we must create our top-level bundle product and add it to a pricelist. Use the information in the table following these steps to create the HP Printer and Ink Bundle product.

CC Exercise: Create a Bundle

1. Click the **CC Products** tab in your CloudCraze training environment.

2. Click **Go!** to see all products in this org.

3. Click **New CC Product.**

4. Input the **Product Name** and **SKU.**

5. Set the Product Type as **Bundle.**

6. Set Product Status to **Released.**

Click **Save.**

Add the product to the Enterprise price list.

Bundle Product Data	
Product Name	HP Printer and Ink Bundle
SKU	3512799
Price List Item	$90 on the Enterprise Price List

CC Exercise: Add Component Products

1. While viewing the HP Printer and Ink Bundle product we just created, scroll to the related list titled **Composite Products.**

2. Click **New CC Composite Product**.

3. Put a 1 in the **Quantity** field.

4. Use the lookup tool by the Component field to select the **HP Officejet Pro 6230 ePrinter**.

Click **Save.**

Repeat the steps to add the **HP 934XL - black ink cartridge** as a composite product of the HP Printer and Ink Bundle.

Note: Similarly to how there are two related lists for Related Products on the product object, there are two related lists for Composite Products object so that we can see this relationship from both sides. Components make up Composite Products.

- **Composite Products (Component)** shows us composite products that the product we're viewing is a component of.
- **Composite Products** shows us the component products that are included in the composite product we're viewing.

Navigate to the storefront and find the HP Printer and Ink product. Verify that you can see both of our products as components on the Product Detail Page.

Product Kit

Learning Objective…

By the end of this exercise you should be able to explain how to create a Kit Product.

Exercise is for…

Functional Experts

Pre-Requisites…

- Before working through this exercise, you should be familiar with setting up simple products and adding them to price lists.

Objects Used…

- CC Products
- CC Pricelist
- CC Composite Products

In this exercise, you will learn how configure a kit product. Kits are a collection of products that it makes sense to sell as a grouping, similar to the bundle that you set up in the last exercise. The difference here is that a bundle's price is set on the bundle itself, whereas a kit's price is the sum of the prices of the products that make it up.

Customers often want to buy products that work in conjunction with one another. While you can use CC Related Products (more on these later) to show products that might work well with the product your customer is viewing, giving them pre-configured groupings to choose from makes their shopping experience much easier and is a great way of upselling.

Industrio carries personal computer towers, monitors, and keyboards, as separate devices. The product marketing department has decided to group several of them together to sell as a full computer kit that their customers can buy.

First, we must create our top-level kit product and add it to a pricelist. Use the information in the table following these steps to create the HP ProLiant Kit.

CC Exercise: Create a Kit

1. Click the **CC Products** tab in your CloudCraze training environment.
2. Click **Go!** to see all products in this org.
3. Click **New CC Product.**
4. Input the **Product Name** and **SKU.**
5. Set the Product Type as **Kit.**
6. Set Product Status to **Released.**

Click **Save.**

Add the product to the Enterprise price list.

Bundle Product Data	
Product Name	HP ProLiant Kit
SKU	KIT-002
Short Description	Get a complete HP Personal Computer system with monitor, keyboard, and mouse.
Long Description	Get a complete HP Personal Computer system with monitor, keyboard, and mouse.
Price List Item	$0 on the Enterprise Price List

CC Exercise: Add Component Products

1. While viewing the HP ProLiant Kit product we just created, scroll to the related list titled **Composite Products.**
2. Click **New CC Composite Product**.
3. Put a 1 in the **Quantity** field.
4. Use the lookup tool by the Component field to select the **HP ProLiant ML110 G6 - Core i3 540 3.06 GHz**

Click **Save.**

Repeat the steps to add the **Logitech Media Combo MK200** and **HP LE1901wm 19" Wide LCD** as a composite products of the HP ProLiant Kit.

Note: Similarly to how there are two related lists for Related Products on the product object, there are two related lists for Composite Products object so that we can see this relationship from both sides. Components make up Composite Products.

- **Composite Products (Component)** shows us composite products that the product we're viewing is a component of.
- **Composite Products** shows us the component products that are included in the composite product we're viewing.

Navigate to the storefront and find the HP Printer, Keyboard and Monitor product. Verify that you can see both of our products as components on the Product Detail Page.

Dynamic Kit

Learning Objective…

By the end of this exercise you should be able to explain how to create a Dynamic Kit Product and understand how it is used.

Exercise is for…

Functional Experts

Pre-Requisites…

- Before working through this exercise, you should be familiar with setting up simple products.

Objects Used…

- CC Products
- CC Pricelist
- CC Composite Products

This is a product with various options that the customer can select. In this exercise, you will be creating the Dynamic Kit Product.

Dynamic Kit pricing is the same as that of the standard kit - the price is determined by the sum of the products making it up. Unlike a kit, however, a dynamic kit allows customers to choose which products make up the kit.

Customers often want to buy products that work in conjunction with one another. While you can use related products (more on these later) to show products that might work in conjunction with the product your customer is viewing, giving them pre-configured groupings to choose from makes their shopping experience much easier. It's also a great way to cross-sell products they might not have seen otherwise.

Industrio would like to give their customers the option of building their own computer system. Customers should be able to customize their own computer setup by selecting a CPU, monitor, keyboard, and having the option to add a printer. The kit will not offer a discount, but, rather, increase exposure of many different products through a Dynamic Kit.

First, we must create our top-level kit product and add it to a pricelist. Use the information in the table following these steps to create the Build Your Own System product.

CC Exercise: Create a Dynamic Kit

1. Click the **CC Products** tab in your CloudCraze training environment.
2. Click **Go!** to see all products in this org.
3. Click **New CC Product.**
4. Input the **Product Name** and **SKU.**
5. Set the Product Type as **Dynamic Kit.**
6. Set Product Status to **Released.**

Dynamic Kit Product Data	
Product Name	Build Your Own System
SKU	3512801
Price List Item	$0 on the Enterprise Price List

We now have the top-level Dynamic Kit product created. The other products that will make up the Dynamic Kit have already been created for you in your training environment. Next, we'll need to create our groupings for the similar products that belong together.

CC Exercise: Create CC Related Product Groups

1. Click the "+" in the tabs section to get a list of all the tabs not shown.
2. Scroll through the list and choose **CC Related Product Groups.**
3. Click the Go! button to see a list of group already created.
4. Click the **New Related Product Group** button to a new group to the list
5. Create a Related Product Group for **CPUs, Monitors, Keyboards,** and **Printers**. Remember the GroupId must be unique.

Click **Save.**

Our product groups have been created. Next we need to add our component products to the top level composite product and specify which group they belong in.

CC Exercise: Add Component Products

1. While viewing the Build Your Own System Product we created in the first step of this exercise, scroll to the related list titled **Composite Products.**

2. Click **New CC Composite Product**.

3. Use the lookup tool by the Component field to select the **HP ProLiant DL120 G7 Base - Xeon E3-1220 3.1 GHz**.

4. Put a 1 in the **Quantity** field.

5. Specify **CPUs** as the Product Group

Click **Save.**

Repeat the steps to add the **HP ProLiant DL180 G6 - Xeon E5620 2.4 GHz** as a component product and specify the Product Group as **CPUs.**

Repeat the steps to add the **Acer V203H CJbd 20" Wide LCD** and **HP LE1901wm 19" Wide LCD** as component products and specify the Product Group as **Monitors**.

Repeat the steps to add the **Microsoft Natural Ergonomic Keyboard 4000 for Business** and **Logitech Wireless Keyboard K250** as component products and specify the Product Group as **Keyboards**.

Repeat the steps to add the **HP Officejet Pro 6230 ePrinter** and **Epson Workforce 30 Printer** as component products and specify the Product Group as **Printers**.

Once we've added our component products and grouped them, the last step is to specify the behavior of how we want customers to engage with a particular section. In creating a Product Guide, we can specify if selecting an item from a particular group is required, if we can select one or multiple options from a group, and we can determine whether or not the user is allowed to change the quantity of an item they're purchasing.

You'll need a Product Guide for each Related Product Group. Since we created four Product Groups, we'll need to create four Product Guides. Use the table immediately following this set of steps to create each guide.

CC Exercise: Create Product Guides

1. While viewing the Build Your Own System product we created in the first step of this exercise, scroll to the related list titled **CC Product Guides.**

2. Click the **New CC Product Guide** button.

3. Select a **Display Type** from the picklist.

4. Check the box for **Required** if participants are required to select a product from this group before being able to add the dynamic kit to their cart.

5. Specify the Related Product Group this Product Guide applies to. Be sure to use the Lookup tool to select this.

6. Sequence determines the order our groupings are displayed to the customer. In this case we want the customer to first select a CPU and Monitor, then any accessories.

Click **Save.**

	CPUs	Monitors	Keyboards	Printers
Display Type	Single-Select	Single-Select Quantity	Multi-Select Quantity	Multi-Select
Required	Yes	Yes	No	No
Related Product Group	CPUs	Monitors	Keyboards	Printers
Sequence	100	200	300	400

Navigate to the storefront and find the Build Your Own System Product. Verify that you can see and select components in each of the groups and that the selection behavior is as you defined in your product guides.

Promotions

Learning Objective…

By the end of this exercise you will understand how to add a promotion to be displayed on the storefront.

Exercise is for…

Admins

Functional Experts

Pre-Requisites…

- Before working through this exercise, you should be familiar with navigating Salesforce and CC Admin
- Configuring Images in Salesforce

Objects Used…

- CC Promotions

In this exercise you will learn how to create promotions for your storefront. Promotions are used to direct and/or alert users to specific products, categories, or pages that will guide them to certain areas in the storefront.

Customers often go to the storefront with the purpose of purchasing a specific product or set of products. Through the use of a CC Promotion, we can alert them to other products or special offers. These promotions can be presented through the use of custom images and banners and can be configured to take the user to a particular category or product page. We can create promotions with specific start and end dates which allows them to be scheduled ahead of time, and through the use of account groups, we can target our promotions to specific customers.

Industrio's marketing team has been alerted to a special sale that is upcoming on the site. They want to promote this special offer on the storefront so that customers are made aware of it. We'll use a CC Promotion to accomplish this.

CC Exercise: Create CC Promotion

1. Click the **CC Promotions** tab in your CloudCraze training environment.
2. Click **Go!** to see all Promotions that already exist in the org.
3. Click **New CC Promotion**.
4. Name the Promotion **Special Offer**.
5. Set **Location Display Sequence** to **1000**.
6. Set **Location Type** to **Right Nav.**
7. Set **Page Location** to **Landing Page.**
8. Set **Image Source** to **URI**.
9. In the URI field specify the image file path (if copy and pasting the below link, there will be a space at the end of the first line you'll need to remove):
    - https://encrypted-tbn0.gstatic.com/images?q=tbn:ANd9GcQokfZFex1V13i-FmOxyXUBQN5mQA2U7qGuyuxoRlJPc8FDa48y
10. Move **DefaultStore** from the list of **Available** Storefronts to the **Chosen** column.

Click **Save**.

Go to the Storefront and verify that you see your new promotion for this Special Offer at the bottom of the right nav of the Landing Page.

Menus

Learning Objective…

By the end of this exercise you will understand how to configure and change the menu bar.

Exercise is for…

Admins

Functional Experts

Pre-Requisites…

- Before working through this exercise, you should be familiar with navigating Salesforce

Objects Used…

- CC Menu
- CC Menu Item

In this exercise you will learn how to add, delete, and configure Menu items for your storefront. Menus will help dictate how users navigate your storefront.

The menu created for your page will determine the flow of your storefront and will be one of the primary ways in which users will browse your page. Menu items can link to products, categories, or your company's homepage if so desired. Different menu items can be presented depending on the type of page being accessed. For example, landing page, product detail, shopping cart, order review, order confirmation, etc. Menus can also contain sub menu items up to 5 levels deep.

Industrio's requirements call for the need to display menu options to direct users to Products, Services, and About Us sections in the storefront. The Products menu needs to contain sub menu items for Printers, and Monitors. The Services menu needs to contain sub menu items for Installations and Repairs.

The CC Menu records have already been created in your training org. In this exercise, we'll just be changing the value that displays for each Menu bar tab.

CC Exercise: Change 3 CC Menu records

1. Click the **CC Menu** tab in your CloudCraze training environment.

2. Click **Go!** to see all Menu records that already exist in this org.

3. Click into the menu record for **Navigation Item #1.**

4. Change the **Display Name** for this record to be **Products**.

Click **Save.**

Repeat these steps to change **Navigation Item #2** to be **Services**, and **Navigation Item #3** to be **About Us.**

> You'll need to refresh the Menu Index to see your Menu changes on the storefront. You can find this in CC Admin | Indexing.

CC Exercise: Add sub-menus

1. Navigate to the **Products** menu record we just adjusted.

2. Click into edit the record for **Sub Navigation #1** in the related list for **CC Menu Items.**

3. Change the **Display Name** to be **Printers.**

4. Change the **Link Type** to **Category** and use the lookup tool by the **Category** field to find the **Printers** category.

Click **Save.**

Repeat these steps to adjust **Sub Navigation #2** on the 'Product' menu tab to be **Monitors**. Don't link this to a category.

On the 'Services' menu tab change the **Sub Navigation #1** to be **Installations** and **Sub Navigation #2** to be **Repairs.** Don't link either of these to a category.

After refreshing the Menu Index in CC Admin, return to the storefront. You should see the three Menu tabs now displaying as Products, Services, and About Us, in addition to the sub-menus we configured. Clicking on the Printer sub-menu item should bring you to the Printers Category page.

Featured and Spotlight Products

Learning Objective…

By the end of this exercise you will understand how to configure which products display in the Featured and Spotlight Products sections on the homepage.

Exercise is for…

Admins

Functional Experts

Pre-Requisites…

- Before working through this exercise, you should be familiar with navigating Salesforce
- CC Products

Objects Used…

- CC Featured Products

In this exercise you will learn how to create featured and spotlight products. We use the featured and spotlight sections on the Homepage to help draw more attention to particular products.

Featured and Spotlight products are used to showcase specific products on your storefronts homepage. Featured and Spotlight products appear in separate sections on the storefront and comprise much of the content on the main section of the homepage. These sections can be enabled or disabled through the use of configuration settings. The spotlight products section is intended to contain a few products with a large content blurb about each. The featured products section is typically used to display more products with less content about each.

The digital sales team at Industrio wants to highlight some of the company's best selling products by displaying them on the Landing Page. In this exercise we're going to add several products to the Featured Product and Spotlight Product sections on your storefront.

We use the CC Featured Products object to create both Spotlight and Featured Products, and they are created almost exactly the same way - the only difference being what you specify as the 'Type.' To create the Featured Product and Spotlight Product records and add the appropriate products to these sections, use the table immediately following the set of steps below and repeat the steps for each product.

CC Exercise: Create 3 CC Featured Products records

1. Click the **CC Featured Products** tab in your CloudCraze training environment.

2. Click **Go!** to see all Featured Product records in this org.

3. Click **New CC Featured Product.**

4. Input the **Featured Product Name.** This name will not appear on the storefront, it is only to name the record in Salesforce. You'll likely want to use the Product name for clarity.

5. Use the lookup tool by the **Product Item** field to find which product you are trying to display**.**

6. Choose which **Storefront(s)** this featured product record should be used for.

7. Enter the **Sequence** number for the record. Sequence number determines the order in which your products are displayed in the storefront.

8. Select the **Enabled** checkbox.

9. Select the appropriate **Type**.

Click **Save.**

	HP Printer	Epson Printer	Ink Cartridge
Product Item	HP Officejet Pro 6230 ePrinter	Epson WorkForce 30 Printer	HP 934XL - black ink cartridge
Storefront	DefaultStore	DefaultStore	DefaultStore
Sequence	50	75	50
Type	Spotlight	Spotlight	Featured

Refresh the homepage on your storefront and verify that you are seeing our products displaying the featured and spotlight products sections.

We can use the Promotion Description field on these records to present a unique description next to each of our Featured or Spotlight products. If nothing is entered in this field, the short description from the product will be pulled in here.

Page Sections

Learning Objective…

By the end of this exercise you will understand how to create a Page Section and embed a video on a Product Detail page.

Exercise is for…

Functional Experts

Pre-Requisites…

- Knowledge of the various pages in CC

Objects Used…

- CC Page Sections

Up to this point in the User Interface section of training, we've been adding to or changing existing elements of the storefront. With Menus, Categories, Promotions and Featured/Spotlight products, we were configuring these items to appear in pre-defined spots. Occasionally we will need to create a new place for our content to appear, which is what we use CC Page Sections for.

A CC Page Section allows us to create a new tab or widget on the Product Detail page where we can display specs, add text content, and offer links to downloads or videos. We can even embed a video directly on the Product Detail page with no coding needed.

Industrio would like to begin adding product videos to the Product Detail Page for some of their products. The first product to have a video added will be our HP Printer. This video should display in a new tab on the page and should be configurable by business users.

Before we can add a video to the page, we will need to create a new CC Page Section for where the video should go. We can add page sections as either a tab or a widget. For this requirement, we'll create it as a tab. Complete the steps below.

CC Exercise: Create a CC Page Section

1. Navigate to the **CC Page Sections** tab in your CloudCraze training environment. You will likely have to click on the '+' button to see additional tabs and find this particular tab.
2. Click **Go!** to see all page sections in this org.
3. Click **New CC Page Section.**
4. Type **tabSec** in the **Grouping** field**.**
5. Type **Product Videos** in the **Section Filter Other** field**.**   This field is used to filter on the type of Product Tab content that should go in this page section.
6. Set Storefront to **DefaultStore.**
7. Location should be **Main Content.**
8. Set **Display Type** to **Tab**. The other option here is to display as a widget in the storefront
9. Set **Page Name** to **ProductDetails.**
10. Set **Section Name** to **Content.** This field tells the page section which field to pull from on the product tab record.
11. Set **Sequence Number** to **5.**

Click **Save.**

We've just created a page section for where our content should go. Now we need to specify the content to go in this page section for the HP Printer product.

CC Exercise: Add a Product Video to display in our Page Section

1. Navigate to the HP Printer we created earlier.
2. Scroll down to the **Product Tab** related list and click **New CC Product Tab**.
3. The first thing we need to do is add **Product Videos** to the picklist for **Tab**. On the right side of the screen, click the arrow to pop out the menu, then select **View Fields**. This screen should open in a new tab or window.
4. Click on **Tab** in the list of **Custom Fields & Relationships**.

5. In the section titled **Values**, click **New**.

6. Type **Product Videos** in the text box and click **Save.**

7. Return to the CC Product Tab edit screen (the window should still be open where we opened the side menu from and clicked View Fields from earlier) and refresh the screen to see our new value, **Product Videos**, appear in the **Tab** picklist. Select this option.

> You can also navigate to the Product Tab object edit screen that we're on here by going to Setup | Create | Objects | CC Product Tab

8. Make sure your start and end dates are valid and that the Enabled flag is set to True.

9. Set the **Locale** to **en_US.**

10. Paste the below snippet in the **Content** field. Be sure to remove the spaces at the end of each return line below, which are caused by the way the URL copies. They will be after embed/ and encrypted-media"

    - <iframe width="560" height="315" src="https://www.youtube.com/embed/ M9wfJz-wb5I" frameborder="0" gesture="media" allow="encrypted-media" allowfullscreen></iframe>

Click **Save.**

Navigate to the storefront and find the HP Printer. On the product detail page you should find a new tab titled **Head_ContentProduct_Videos**. In that tab you should be able to see and play our newly added product video.

This is the Page Label Name for this page section, which has been automatically generated. In the next exercise, we'll cover what a page label is, where they're used, and how to change them.

Page Labels

Learning Objective…

By the end of this exercise you will understand how to edit and create CC Page Labels to adjust text that displays on the storefront.

Exercise is for…

Admins

Functional Experts

Pre-Requisites…

- Before working through this exercise, you should be familiar with navigating Salesforce and CC Admin

Objects Used…

- CC Page Labels

In this exercise you will learn how to modify and create page labels in order to customize the headings and titles on different components of your storefront. These sections include Featured and Spotlight Products, Product Search, My Cart, etc.

Modification of Page Labels gives administrators access to create custom headings for standard CloudCraze components. This is important for administrators that have been tasked with creating a consistent look and feel between their company's website and CloudCraze storefront.

Industrio is using the Spotlight Products component on their storefront homepage. The marketing team has decided that this section would be ideal to feature their core product offering. They wish to change the section name to something more in line with their brand message. They're decided to rename the section “Signature Products”. We need to adjust this on the storefront.

First, we will change the existing page label which currently reads Spotlight Products

CC Exercise: Change a CC Page Label

1. Navigate to the **CC Page Labels** tab in your CloudCraze training environment. You will likely have to click on the '+' button to see additional tabs and find this particular tab.

2. Click **Go!** to see all page Labels in this org.

3. Find the CC Page Label with Page Label Name '**Spotlight_Title'.** Click **Edit.**

4. Change the Value for this page label to be **Signature Products.**

Click **Save.**

- You'll need to refresh the Page Label Index to see your Page Label changes on the storefront. You can find this in CC Admin | Indexing.
- Occasionally your browser cache may interfere here as well. If you do not see your change, try hitting ctrl+shift+R on a PC or cmd+shift+R on a Mac.
- Page Label caching can be turned on or off via a configuration setting. Turning this on should result in increased page load speed performance.

Navigate to the homepage of your storefront and verify that the first section on the page now reads **Signature Products.**

If you've been following the exercise guide up to this point, you'll remember that in the Page Sections exercise we created a new tab which displayed the Page Label Name **Head_ContentProduct_Videos.** This next set of steps will cover how to create a new page label to dictate the text that displays there.

CC Exercise: Create a CC Page Label

1. Navigate to the **CC Page Labels** tab in your CloudCraze training environment. You will likely have to click on the '+' button to see additional tabs and find this particular tab.

2. Click **Go!** to see all page Labels in this org.

3. Click **New CC Page Label.**

4. Put the value **Head_ContentProduct_Videos** in the **Page Label Name** field.

5. Type **ProductDetails** in the **Page Name** field.

6. Set the **Value** to be **Product Video**. This is what will show up in place of the page label on the storefront.

7. Specify **DefaultStore** in the **Storefront** field.

Click **Save.**

Again, refresh your page label cache. Return to the storefront and navigate to the **HP Printer.** The tab displaying the HP Printer video should now be labelled **'Product Video.'**

To see all page label names display on a storefront we can go to **CC Admin | Storefront Settings,** then scroll to the bottom of the **General** tab, select the **Display Page Label Names** checkbox, and click **Save**. On the storefront you can immediately see all page label names displayed rather than their values. This can be quite handy during development, but should never be turned on in your production environment, as this is what your customers will see as well.

Localization

Learning Objective…

By the end of this exercise you will understand how to offer different languages and currencies to your customers.

Exercise is for…

Functional Experts

Pre-Requisites…

- Before working through this exercise, you should be familiar with navigating Salesforce and CC Admin

Objects Used…

- Multiple objects are used depending on which objects are being localized

In this exercise you will learn how to localize your CloudCraze storefront. Localization includes displaying product descriptions, page labels, menus, categories, and all other text on the site in different languages. It also includes displaying product pricing in additional currencies.

Localization is important to international companies who have customers located in countries around the world, speaking many languages and buying in a number of currencies other that the US Dollar. If we expect these diverse customers to use our site, we need to offer them a browsing experience that caters to them.

It is important to note that localization of language and localization of currency are two separate tasks in CloudCraze. In this chapter, we will go through exercises to walk through both.

Industrio is based in the United States. 40% of their customers are located outside of the US though. To serve their customers, Industrio needs to enable the languages and currencies of the other countries in which they do business.

In this exercise, we're going to start by enabling each of the additional currencies and languages that will be available in our storefront. After we enable different currencies and languages for use, we will create localization records for products, descriptions, page labels, menus, and categories. We'll also need to create a new pricelist for each currency we want to make available.

CC Exercise: Enable two additional Currencies and Languages in your Storefront

1. Click on the **CC Admin** tab.
2. Select your **Storefront** from the dropdown by **Global Settings**.
3. Click on **Localization** tab within the left hand navigation.
4. From the Available Languages list, slide over '**es**' (Spanish) and '**it**' (Italian) into the **Selected Languages** area.
5. From the Available Currencies list, slide over 'EUR' and 'GBP' into the **Selected Currencies** area.

Click **Save.**

Now that we've enabled alternate currencies and languages in the storefront, we'll want to confirm that our test user is able to swap between them. Navigate to the storefront as Howard Jones and click on **My Account**. Scroll to the bottom and click **Edit Profile.** Confirm that Italian and Spanish appear in the drop down for Language and EUR and GBP appear in the drop down for Currency.

To localize our content, we will need to create translations for Menu Items, Categories, Page Labels, and Products. Each of these CC Objects has an i18n counterpart related to it (E.g. - CC Menu :: CC Menu i18n, etc.). You'll want to create an i18n record for each language you have enabled on your storefront.

Complete each of the following exercises using the table that follows each set of steps for the exercise.

CC Exercise: Set User Currency

1. Click **Setup** in the top right of your screen.
2. Within the Quick Search field, search keyword 'Users' and click on **Users** under Manage Users.
3. Locate User **Howard Jones**, click on **Edit**.
4. Set Currency to **EUR**.

Click **Save.**

Go to your storefront and refresh your the Home Page, you will notice that no products display. This is because we do not have any products associated with an EUR Price List.

CC Exercise: Create EUR and GBP Price Lists

1. Click the **CC Price Lists** tab in your CloudCraze training environment.
2. Click **New**.
3. Create a new Price List, called **EUR Price List**
4. Set the storefront to **DefaultStore.**
5. Set the **Currency ISO Code** to **EUR**.
6. Enter **Euro Pricelist** into Desc field.
7. Set a Pricelist Id that is unique.

Click **Save.**

Repeat the steps above to create a **GBP Price List** and specify the **Currency ISO Code** as **GBP**.

CC Exercise: Add products to Italian and Spanish Price Lists

1. Navigate to **CC Price Lists** object. Click into your **EUR Price List**.
2. Scroll down to the **Price List Items** area, click on **New CC Price List Item**.
3. Select the appropriate **Product** and enter the price shown in the table below.

Click **Save.**

Repeat the steps above to create **Price List Items** for each of the products in the table below on the appropriate price list.

Product Name	EUR Price List	GBP Price List
HP ProLiant MicroServer - Athlon II Neo N36L 1.3 GHz	€250.00	£215.99
Logitech B100 Optical USB Mouse	€6.75	£6.19
HP ProLiant ML110 G7 - Xeon E3-1220 3.1 GHz	€675.00	£650.00
HP 934XL - black ink cartridge	€7.85	£7.49

When you create a new Price List Item, you only enter the numeric data, not the currency symbol. The currency symbol should change appropriately depending on the currency you select. This is controlled via a page label.

Now that we've added products to our EUR and GBP price list, we need to grant our test user access to view them on the storefront.

CC Exercise: Associate Price Lists with an Account Group

1. Go to the **CC Account Group** object.
2. Click **Tier 1**.
3. Within **Account Group Price List** click **New CC Account Group Price List**.
4. Use the lookup tool to select the **EUR Price List.**

Click **Save**.

Repeat the steps above to also add the **GBP Price List** to the **Tier 1** Account Group.

We need to confirm that your test user sees the products from the appropriate price list when they elect to browse in a specific currency. Navigate to the storefront as Howard Jones and click on My Account. Scroll to the bottom and click **Edit Profile.** Set the user's currency to **Euro** and click **Save**. You should now see the products we added to the EUR Pricelist above displaying in your storefront.

This completes the work necessary to localize the currency of the storefront. In the following exercises we'll work on localizing the language of the content.

CC Exercise: Create Menu i18n records

1. Click on the **CC Menu** tab.
2. Click **Go** to bring up the currently configured navigation headers.
3. Click into the menu item for **Products** by clicking on its **CC Menu Auto Number**.
4. Locate the CC Menu I18N area, and click the **New CC Menu I18N** button.
5. Set the **Display Name** to **Productos** and the **Locale** to **Spanish**.

Click **Save.**

Repeat these steps to create i18n Menu records for the Products and Services menu items.

Menu DisplayName	Spanish	Italian
Products	Productos	Prodotti
Services	Servicios	Servizi

You'll need to refresh the Menu Index to see your Menu changes on the storefront. You can find this in CC Admin | Indexing.

Now that we've set up I18N records for CC Menus in your storefront, we need to confirm that your test user sees these values when they set different languages in their profile. Navigate to the storefront as Howard Jones and click on My Account. Scroll to the bottom and click **Edit Profile**, and set the users language to Spanish. Your first two menu items should now read **Productos** and **Servicios**. Then when changing the language to **Italian** your first two menu items should read **Prodotti** and **Servizi**.

We'll repeat this process to add i18N records for your Categories, Page Labels, and Product data. You can test after each section, or create all of your i18n data and test at the end of the chapter. Be sure to test with Howard Jones and refresh caches as needed.

CC Exercise: Create Category i18n records

1. Click the **CC Categories** tab in your CloudCraze training environment.
2. Click **Go!** to see all categories that exist in the org.
3. Click the category name **Security Appliances**.
4. Locate the CategoryI18Ns area, and click the **New CC CategoryI18N** button.
5. Set the **Category I18N** Name to **Dispositivos de Seguridad** and set **Locale** to **Spanish**.

Click **Save.**

Category Name	Spanish	Italian
Security Appliances	Dispositivos de Seguridad	Apparecchi di Sicurezza
Storage Devices	Dispositivo de Almacenamiento	Dispositivo di Archiviazione

You'll need to refresh the Category Index to see your Category changes on the storefront. You can find this in CC Admin | Indexing.

With the users language set to Spanish, your first two Category items should now read **Dispositivos da Seguridad** and **Dispositivos de Almacenamiento**. When changing the language to **Italian** your first two menu items should read **Apparecchi di Sicurezza** and **Dispositivo di Archiviazione**.

CC Exercise: Create Page Label i18n records

1. Click the **+** symbol in the menu bar in Salesforce, then click **CC Page Labels**.

2. Click **Go!** to see all specs that already exist in the org, and then click **F** at the top right.

3. Find the Page Label name **Featured Title**.

4. Locate the CC PageLabeli18ns area, and click the **New CC PageLabeli18n** button.

5. Set the **Value** to **Productos Destacados** and set **Locale** to **Spanish**.

Click **Save.**

Page Label Name	Spanish	Italian
Featured Title	Productos Destacados	Prodotti Sponsorizzati
Spotlight Title	Productos Spotlight	Prodotti Spotlight

You'll need to refresh the Page Label Index to see your Page Label changes on the storefront. You can find this in CC Admin | Indexing.

With the users language set to Spanish, your first two Category items should now read **Productos Destacados** and **Productos Spotlight**. When changing the language to **Italian** your first two menu items should read **Prodotti Sponsorizzati** and **Prodotti Spotlight**.

CC Exercise: Create Product Item I18N records

1. Click the **CC Products** tab in your CloudCraze training environment.

2. Click **Go!** to see all Products that exist in the org.

3. Click the Product name **HP 934XL - black ink cartridge**.

4. Locate the ProductLocale area, and click the **New CC Product Item I18N** button.

5. Set the **Product Item I18N Name** Name to **HP 934XL - cartucho de tinta negra** and set **Locale** to **Spanish**.

Click **Save.**

With the users language set to Spanish, the black ink product should display as **HP 934XL - cartucho de tinta negra**.

It's important to keep in mind that there is no sort of automated translations or currency conversion which takes place in CloudCraze out-of-the-box. You will have to manually load or create the data to localize currency or language.

CloudCraze clients in the past have used data loader to perform mass uploads of i18n Data and converted price lists. Others have used triggers so that adjusting a price on one price list applies the proper conversion to other price lists. Additional options are possible via integrations to an external system.

Tiered Pricing

Learning Objective…

This exercise will teach you how to setup a product in a way that grants customers quantity based discounts.

This exercise is for…

Functional Experts

Pre-Requisites…

- You should understand how to setup products and assign them to a price list.

Objects Used…

- CC Product
- CC Price List

It is common in both B2B and B2C selling to offer customers a discount when they order a high quantity of a particular item.

Tiered Pricing gives you the ability to configure your products for volume-based pricing. This allows you to increase or decrease the per unit cost of a product as the quantity added to the cart changes. Using Tiered Pricing, you can incentivize your customers to purchase larger quantities of a product by applying price adjustments based on the quantity tier selected.

Although tiered pricing can decrease the price per unit as the quantity added increases, the price could also increase depending on configuration.

Industrio wants to offer incentives for their Tier 1 customers who purchase some products in higher quantities, starting with the **Iomega StorCenter** server product. Customers should receive a $10 discount per unit for every 10 additional units they order, up till a quantity of 50. Any orders of more than 50 units will be the same price per unit.

Volume Discounts are common and there are a number of ways that they can be. offered. There are two very common ways this is handled in eCommerce.

Stepped pricing refers to one way of offering a discount per unit on items purchased past a certain threshold. Imagine we specify that customers receive a $5 discount per unit if they buy more than 10 units. In a stepped pricing scenario, if a customer purchased 12 units, they would pay $20 per unit for the first 10 units, but the 11th and 12th would be $15.

Tiered pricing is another way of offering a discount per unit on items purchased past a certain threshold. In a tiered pricing scenario with the same use case above (customers receiving a $5 discount per unit after buying more than 10 units, customer is buying 12 units) the customer would pay $15 for all 12 units, rather than just the units past that defined threshold.

Only tiered pricing is supported in out-of-the-box CloudCraze. Tiered Pricing in CloudCraze allows you to specify and absolute price, absolute discount, or percentage discount for each of your tiers.

We're going to give the **Iomega StorCenter ix2-200 2TB Network Storage Cloud Edition - NAS server** product several pricing tiers. Before we define the pricing tiers we'll need to configure a few things in our org to allow us to see the necessary page sections for tiered pricing. We'll first add the Tiered Pricing Visualforce component to the Price List Item layout.

CC Exercise: Add Tiered Pricing Component to PLI Layout

1. In your CloudCraze training Org, navigate to any Price List Item.
2. Click on **Edit Layout.**
3. In the left section at the top of the screen, select **Visualforce Pages.**
4. Drag the **PriceListItemsTiered** component beneath the Price List Item Detail section.

Click **Save.**

Next we'll need to add the page section to the product detail page where the tiered pricing data will display to customers. This page section shows the unit discount for each of our configured tiers. Before we can add the page section, we need to add a value to the Section Name picklist

CC Exercise: Create New CC Page Section for Tiered Pricing Data

1. Navigate to the **CC Page Sections** tab in your CloudCraze training environment. You will likely have to click on the '+' button to see additional tabs and find this particular tab.

2. Click **Go!** to see all page sections in this org.

3. Click **New CC Page Section.**

4. The first thing we need to do is add **Tiers** to the picklist for **Section Name**. On the right side of the screen, click the arrow to pop out the menu, then select **View Fields**. This screen should open in a new tab or window.

> You can also navigate to the Page Section object edit screen that we're on here by going to Setup | Create | Objects | CC Page Section

5. Click on **Section Name** in the list of **Custom Fields & Relationships**.

6. In the section titled **Values**, click **New**.

7. Enter **Tiers** and click **save**.

8. Return to the CC Page Section edit screen (the window should still be open where we opened the side menu from and clicked View Fields from earlier) and again click **View Fields** in the expanded side panel to open a new window.

9. Click on **Page Name** in the list of **Custom Fields & Relationships**.

10. In the **Field Dependencies** section, click **Edit** next to the **Section Name** dependent field.

11. Click **Next** to scroll right until you see the **Product Details** column.

12. Double-click **Tiers** until the cell that contains it is highlighted in yellow, then click **save**. This is creating a dependency so that when we select Product Details as the Page for our Page Section, Tiers is one of the options for the Section Name.

13. Again return to the CC Page Section edit screen (the window should still be open where we opened the side menu from and clicked View Fields from earlier). Refresh this screen. If you closed out of this screen you can also simply return to the Page Section tab and create a new page section.

14. Select **ProductDetails** from the **Page Name** drop-down.

15. Select **Tiers** from the **Section Name** drop-down.

16. Enter the storefront name as **DefaultStore**.

17. Set **Display Type** to **Tab**.

Click **Save.**

We now are ready to setup our pricing tiers and test the customer experience on the storefront. Since the requirement calls for only Tier 1 customers to receive access to the volume based discounts, we're only going to set this up on the 20ALL pricelist.

CC Exercise: Create Pricing Tiers For Server Product

1. Navigate to the **CC Products** tab.
2. Click **Go!** to see all products in this org.
3. Find the CC Product called **Iomega StorCenter ix2-200 2TB Network Storage Cloud Edition - NAS server.** (Tip: you can also do a global search to find this product if that is easier.
4. Scroll to the related list for **Price List Items**. Click into the one for the **20ALL** pricelist.
5. In the **Pricing Controls** section you will see the Visualforce Component that we added earlier in this chapter.
6. Click **Add Pricing Tier.** You will see the first line for inputting your tiered pricing data here.
7. At the top of the pricing tiers table, select **Price Adjustment** from the picklist. (Tip: you may have to scroll up a bit in this page section to see the picklist).
8. The first Tier is defined for you. It should say 0 to Max and is the price specified on the Price List Item itself. This is the price for a single unit of this product.
9. In the second line input an **11** in the **Minimum Quantity** column. You will see the tier in the first line adjust to 0-10 automatically.
10. In the **Amount** column, specify **-10**. You will see the **Unit Price** is now $10 cheaper. than the price defined by the tier in the first row.

11. Add additional tiers until 50 to max is your last tier. (21 to 30 = -20; 31 to 40 = -30; 41 to 50 = -40; and 51 to max = -50).

Click **Save Pricing Tiers.**

We have now configured everything needed to offer volume based discounts on this product. Return to the storefront as a user who is entitled to the 20ALL Price List and find the **Iomega StorCenter ix2-200 2TB Network Storage Cloud Edition - NAS server.** On the Product List Page, the listing for this product will show a message stating that Volume Pricing is Available. On the Product Detail Page you should see the page section displaying the tiers and what the unit price is at each tier. Specifying a quantity will adjust the price displayed on the PDP appropriately, and will highlight the tier for that quantity.

Attribute Driven Commerce

Learning Objective…

By the end of this exercise you should be able to properly configure products and prices to utilize ADC functionality.

Exercise is for…

Functional Experts

Pre-Requisites…

- None

Objects Used…

- CC Attribute
- CC Product
- CC Pricelist Item

In this exercise we will familiarize ourselves with Attribute Driven Commerce, how it is setup within CloudCraze and how its data is reflected on the storefront.

Attribute Driven Commerce, or ADC, allows you to define attributes for products that have many aspects or variations. An attribute is any type of quality or feature relating to a product or group of products, such as size, color, weight, entitlement, localization, price range, or material.

Using ADC, you can enhance the shopping experience by empowering your customers to choose the attributes for a given product that best suit their needs and preferences.

For this series of exercises, we will be be utilizing the Select-a-Size Cat5e Cable (SKU: CAT5E) product already defined in your training org. We will be adding to its definition to allow its use with ADC.

Before we can setup a Product to utilize ADC in our Storefront, we must first define the underlying Data Model that ADC relies on to present both Attribute Options and the resulting prices. We do this by defining CC Attribute records in the form of Parent Attributes and Child Attributes.

- A **Parent Attribute** is the high-level attribute category that displays as the list box label on the PDP
- A **Child Attribute** is a choice, or value, that displays in the list box drop-down under the corresponding parent attribute

CC Exercise: Create Parent Attributes for Your ADC Product

1. In your CloudCraze training Org, navigate to the tab for **CC Attributes**.
2. Click on '**New CC Attribute'.**
3. For the **CC Attribute Name** enter '**Length'.**
4. For the **Attribute ID** enter '**Cat5Length'.**
5. For **Effective Start** set it as Yesterday's Date.
6. For **Effective End** set it as 2 Years from today.
7. For the **Display Name** enter '**Length'**
8. For the **Sequence** enter **'300'.**

Click **Save.**

Repeat Steps 1-8 to create a Parent Attribute for '**Color'** with Sequence **'400'.**

- **NOTE:** If the **Parent Attribute** related field is left blank, CloudCraze assumes the CC Attribute record you are creating is a **Parent Attribute**

CC Exercise: Create Child Attributes for Your ADC Product

1. Click on '**New CC Attribute'.**
2. For the **CC Attribute Name** enter '**4Feet'**
3. For the **Parent Attribute** click the Magnifying Glass, find the '**Length**' parent Attribute created in the previous exercise and relate it to your record.
4. For the **Attribute ID** enter '**4FeetCat5'.**
5. For **Effective Start** set it as Yesterday's Date.
6. For **Effective End** set it as 2 Years from today.
7. For the **Display Name** enter '**4 Feet'.**
8. For the **Sequence** enter **'100'.**

Click **Save.**

Repeat Steps 1-8 using the Table below to create 2 additional **Child Attributes** related to the '**Length'** Parent Attribute and 3 **Child Attributes** related to the '**Color'** Parent Attribute.

Parent Attributes	Child Attribute 1 - Sequence 100	Child Attribute 2 - Sequence 200	Child Attribute 3 - Sequence 300
Length	4 Feet	8 Feet	20 Feet
Color	Black	Blue	Red

CC Exercise: Assign Your Attributes to your Product

1. In your CloudCraze training Org, navigate to **CC Product** and find the '**Select-a-Size Cat5e Cable**' (SKU: CAT5E)**.**
2. Within the '**Select-a-Size Cat5e Cable**' product detail find the the **Primary Attribute** field and set it to '**Length'**
3. Find the the **Secondary Attribute** field and set it to '**Color**'

CC Exercise: Define your Attribute Pricing for your Product

1. In your '**Select-a-Size Cat5e Cable**' record, find the CC Pricelist Item section and click **New CC Price List Item.**

2. For **Pricelist** use the '**Enterprise**' pricelist.

3. For **Start Date** set it to Yesterday's Date.

4. For **End Date** leave it as is (12/31/2099).

5. for **Price** set it to '**0.00**'.

6. **Product** should already be defined as your '**Select-a-Size Cat5e Cable**' product

Click **Save.**

7. Now in the Pricing Controls section of your newly created price list item, set the Prices of the Attribute Combinations as defined in the table below:

Primary Attribute (Length)	Secondary Attribute (Color)	Price
4Feet	Black	5.00
4Feet	Blue	5.00
4Feet	Red	6.00
8Feet	Black	9.00
8Feet	Blue	9.00
8Feet	Red	10.00
20Feet	Black	15.00
20Feet	Blue	15.00

NOTE: If an Attribute Combination does not have a price defined the storefront will display the price as **Not Available**

Check your work by Navigating to your DefaultStore, search for the '**CAT5E**' SKU and observe the ADC options on the PDP.

Subscription Products

Learning Objective…

By the end of this exercise you should be able to explain how to create a Subscription Product

This exercise is for…

Functional Experts

Pre-Requisites…

- Before working through this exercise you should be familiar with setting up simple products

Objects Used…

- CC Products
- CC SubProdTerms
- CC Price List

A subscription product provides flexibility for users to support the sale of physical or digital subscription products.

Subscription Products also support 'try and buy' use cases, where users can pay nothing up-front for a set period of time.

Customers often want to buy products on a regular basis and the subscription product configuration gives us the ability to present customers with the option to repeat a purchase on a scheduled basis.

Industrio wants to give customers the option to buy paper on an automated basis. The product marketing team has decided to offer a discounted price when customers purchase paper several months ahead of time, hypothesizing that this will increase sales and make inventory management more predictable.

There are several questions you should consider prior to configuring Subscription Products. In thinking through your businesses Use Cases, the following questions can help guide your decision when considering Shipping & Billing for your Subscription Products. Keep in mind that order frequency and installment frequency will impact the creation of CC Orders and CC Invoices for your implementation.

Order Frequency (Shipping)

1. How frequently do you want to provide the Subscription Item?
2. Do you have shippable or non-shippable products?

Installment Frequency (Billing)

1. How frequently do you want to bill customers for their Subscription Item?
2. When do you want to start billing for customers based on their Subscription Item?
3. What are the up-front costs for the Subscription Item?
4. What are the recurring costs for the Subscription Item?

We use SubProdTerms to define the billing and installment frequency of a particular subscription option. In this exercise, we’re going to configure paper subscription to be delivered and billed on a Weekly, Monthly, or Yearly basis. Use the table following this steps to create SubProdTerms for each of these three options.

CC Exercise: Create CC SubProdTerms

1. Navigate to the **Products** tab in your org.
2. Find the **HP Multipurpose Paper** product.
3. Scroll to the related list for CC SubProdTems and click **New CC SubProdTerm.**
4. Fill in the **CC SubProdTerm Name**
5. Type in the **Storefront** name.
6. Input the **Sequence** number.
7. Set your Start and End dates so that today’s date falls in the range.

8. Input the correct values in the Installment Frequency (Billing) section.

9. Input the correct values in the Order Frequency (Shipping) section.

10. Add your **dynamic variables** for each place where the subscription name will need to be displayed. (See table at end of exercise which defines our dynamic variables)

Click **Save**.

	Information Section		
CC SubProdTerm Name	Weekly Subscription - HP Paper	Monthly Subscription - HP Paper	Yearly Subscription - HP Paper
Storefront	DefaultStore	DefaultStore	DefaultStore
Sequence	100	200	300
Effective Start	Yesterday's Date	Yesterday's Date	Yesterday's Date
Effective End	Any future date	Any future date	Any future date
	Installment Frequency (Billing) Section		
Installment Frequency UOM	Weekly	Monthly	Yearly
Installment Count	52	12	1
Installment Frequency	1.00	1.00	1.00
	Order Frequency (Shipping) Section		
Order Frequency UOM	Weekly	Monthly	Yearly
Order Count	52	12	1
Order Frequency	1.00	1.00	1.00
	Display Section		
Product List Display Name	Pay **{1}** today — Then, pay just **{2}** **{4}**	Pay **{1}** today — Then, pay just **{2}** **{4}**	Pay just **{2}** for a full year of paper!
Product Detail Display Name	Pay **{1}** today — Then, pay just **{2}** **{4}**	Pay **{1}** today — Then, pay just **{2}** **{4}**	Pay just **{2}** for a full year of paper!
Cart Display Name	Your **{5}** subscription costs just **{1}** today, followed by a **{5}** subscription of **{3}**	Your **{5}** subscription costs just **{1}** today, followed by a **{5}** subscription of **{3}**	Your **{5}** subscription costs only **{3}**
Order Display Name	Your **{5}** subscription costs just **{1}** today, followed by a **{5}** subscription of **{3}**	Your **{5}** subscription costs just **{1}** today, followed by a **{5}** subscription of **{3}**	Your **{5}** subscription costs only **{3}**

Subscription Product are unique in their pricing from Regular products, in that each Subscription Product requires **2 price list** entries. The **upfront cost** (which may or may not be $0.00) is what the customer pays today. **Recurring costs** is what the customer will be charged at the interval you specify in the billing frequency of you SubProdTerm. We will need to create these two Price List Items for each of our SubProdTerms. Since we have 3 SubProdTerms, we'll create 6 Price List Items.

CC Exercise: Create Price List Items for Upfront and Recurring Cost

1. Navigate to the **Weekly SubProdTerm** we just created**.**
2. Scroll to the related list at the bottom and click **New CC Price List Item.**
3. Assign the Price List Item we're creating to the **Enterprise Price List**
4. Specify in the **Product** field that this Price List Item is for the **HP Multi-Purpose Paper.**
5. This Price List Item is for the Upfront cost. Input the Upfront Cost from the table below and DO NOT click the **Recurring Price** checkbox.
6. Click **Save and New.**
7. This Price List Item is for the Recurring cost. Input the Recurring Cost from the table below and DO click the **Recurring Price** checkbox.

Click **Save**.

Repeat the steps above to add Price List Items for our Monthly and Yearly SubProdTerms using the table below.

	Weekly	Monthly	Yearly
Upfront Cost	$12.99	$12.99	$99.99
Recurring Cost	$2.99	$9.99	$99.99

Now return to the storefront as our test contact and find the HP Multi-Purpose Paper product. You should see 4 options for buying this product: one which is the cost to buy the product once, and the three subscription options we just configured.

Product Detail Page Variables

Variable	Reference
0	this.displayName
1	(price this.productPrice)
2	(price this.subscriptionPrice)
3	(pageLabelMapMultiString ‘Subscriptions_Frequency_’ this.orderFrequencyUOM)
4	(pageLabelMapMultiString ‘Subscriptions_Frequency_’ this.installmentFrequencyUOM)
5	this.orderFrequency
6	this.installmentFrequency
7	this.installmentCount
8	this.orderCount
	The variables below are only for subscriptions with modifiers.
9	(price this.modifierSubscriptions.[0].productPrice)
10	(price this.modifierSubscriptions.[0].subscriptionPrice)
11	this.modifierSubscriptions.[0].orderCount
12	this.modifierSubscriptions.[0].installmentCount

Cart and Order Display Variables

Variable	Reference
0	displayName
1	(price price)
2	(price SubAmount)
3	(price recurringPrice)
4	(price recurringPriceSubAmount)
5	(pageLabelPrefixMap ‘Subscription_Frequency_’ orderFrequencyUOM)
6	(pageLabelPrefixMap ‘Subscription_Frequency_’ installmentFrequencyUOM)
7	orderFrequency
8	installmentFrequency
9	installmentCount
10	orderCount

Contract Pricing

Learning Objective…

By the end of this exercise you will understand how to grant an account access to a new pricelist through the use of a CC Price Group.

Exercise is for…

Functional Experts

Pre-Requisites…

- CC Price Lists
- Understanding of what qualifies as a product/price 'entitlement' in CloudCraze

Objects Used…

- CC Price Groups

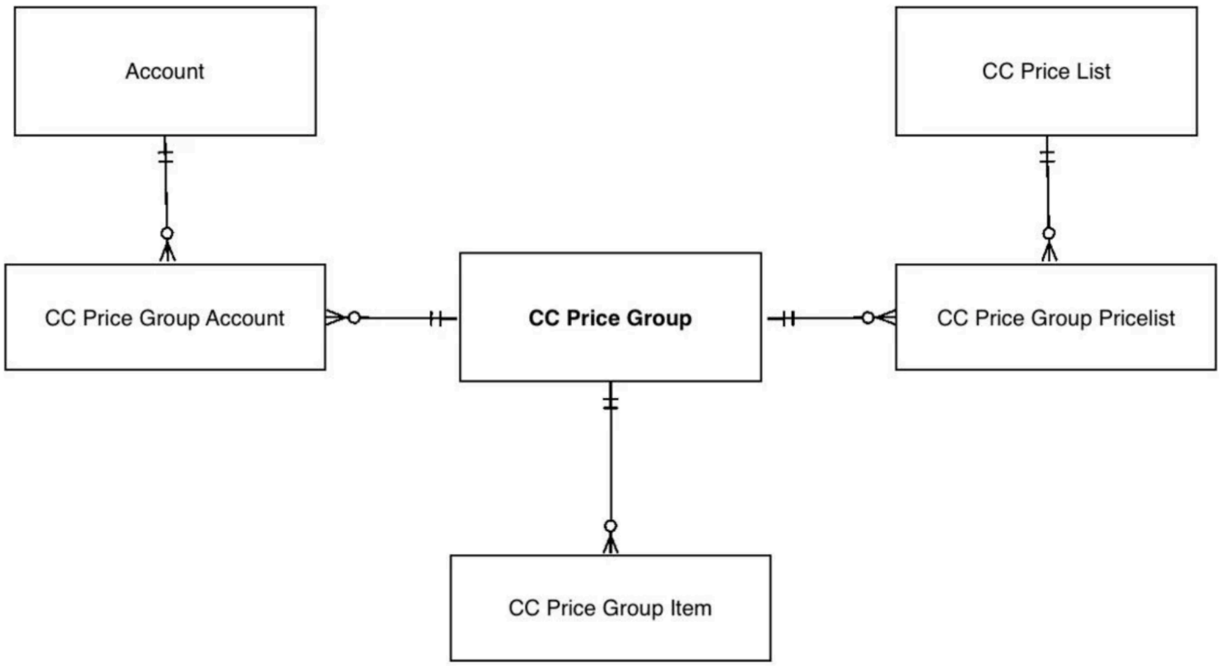
In earlier exercises, we have covered how a user's product and pricing entitlements are delivered by the CC Account Group that that user's account is a part of. There are often times that a business might need to grant a specific account access to additional price lists.

In Business to Business sales, contracts are often negotiated entitling the buyer to subsidized pricing for a particular product or group of products for a short period of time. Using Contract Pricing, we can grant this price reduction to an account without needing to move them to a new account group. We can even set a cap on the quantity of a certain product that these accounts can purchase at the lowered price.

CC Price Groups sit at the center of contract pricing and represent an individual contract. We'll use the CC Price Group to tie a CC Price List to a specific account.

Acme has won a deal with one of their customers who is building a new data center. Acme has negotiated a contract which stipulates Industrio will be the exclusive provider all of the servers and equipment Acme will need to build this data center. This deal grants Acme 3 months of special pricing to purchase, among other things, 500 servers at a lower price than Acme is typically entitled to.

At the center of Contract Pricing is a CC Price Group. You can think of the CC Price Group as representing the contract itself. The price group ties an account to a price list through two junction objects, giving us a new way to offer product and pricing entitlements to our customers. See the data model below:



Accounts are tied to the CC Price Group through a CC Price Group Account record, and CC Price Lists are linked through a CC Price Group Pricelist.

We can use CC Price Group Item records tied to our to CC Price Group to limit how many of a certain product can be purchased at the price designated by this contract. In the example we'll be working through in this exercise, Acme can purchase up to 500 servers at the discounted rate they have negotiated. We'll create a CC Price Group Item record to enforce this quantity cap. CC Price Group Item records are not necessary when configuring a CC Price Group - if we don't want to limit how many of a certain product our customers can purchase at a specific price, we simply don't create this record.

Follow the steps below to setup the Acme contract.

CC Exercise: Create CC Price Group

1. Click the **CC Price Groups** tab in your CloudCraze training environment.
2. Click **Go!** to see all price groups in this org.
3. Click **New CC Price Group.**
4. Name the group **ACME Data Center Exclusive.**
5. Set the **Start Date** to **yesterday,** and set the **End Date** to three months from today.
6. Make sure the **Enabled** flag is checked.
7. **Price Group ID** can be left blank for now. This is an external ID field to be used when moving records between environments.
8. Set **Group Type** to **Contract.**

Click **Save.**

> Note: There are two configuration settings we'll need to be concerned with when setting up contract pricing. Both have already been configured correctly in your org for you.
>
> - **Global.All.PRG.Enabled** determines whether or not contract pricing is turned on and can be set globally or at a storefront level.
> - **Global.All.PRG.Types** is a comma separated list of which Group Types should be used for a given storefront.

We now have the foundation of contract pricing set up. Now we'll want to create a Price List to represent the pricing that Acme has negotiated as part of this contract. To save time, we're going to add just one product to this price list and use it to demonstrate how contract pricing works.

CC Exercise: Create new CC Price List and add Server product to it

1. Click the **CC Price Lists** tab in your CloudCraze training environment.
2. Click **Go!** to see all price lists in this org.
3. Click **New CC Price List.**

4. Name the Price List **Acme Data Center Exclusive Price List.**

5. Set the **Start Date** to **yesterday,** and set the **End Date** to three months from today.

6. Move **DefaultStore** from the list of **Available** storefronts to the list of **Chosen** storefronts.

7. Set the currency to **USD**.

Click **Save.**

8. While looking at the CC Price List we just created, click **New CC Price List Item.**

9. Use the lookup tool by the product field to select the **HP ProLiant MicroServer - Athlon II Neo N36L 1.3 GHz.**

10. This product is listed at $329.99 on the Enterprise Price List. Acme's negotiated price is $249.99. Enter $249.99 in the Price field.

Click **Save.**

We now have created a Price Group representing the contract and a Price List representing the prices on that contract. Next, we need to tie the two together (this is the right side of the data model) and then associate everything to Acme (the left side of the data model).

CC Exercise: Associate CC Price List and Acme Account to CC Price Group

1. Return to the **ACME Data Center Exclusive** CC Price Group that we created earlier.

2. In the CC Price Group Pricelists related list, click **New CC Price Group Pricelist**.

3. Use the lookup tool by the Pricelist field to find the **Acme Data Center Exclusive Price List** that we created earlier.

4. Set the **Start Date** to **yesterday,** and set the **End Date** to three months from today.

5. In the Storefront field input **DefaultStore.**

Click **Save.**

6. Again, navigate to the **ACME Data Center Exclusive** CC Price Group.

7. In the CC Price Group Accounts related list, click **New CC Price Group Account**.

8. Use the lookup tool by the Account field to select **Acme**.

9. Set the **Start Date** to **yesterday,** and set the **End Date** to three months from today.

10. In the Storefront field input **DefaultStore.**

Click **Save.**

If you've followed the steps above correctly, Acme should now be able to access this contract from the storefront.

You'll typically want to build a contract selector widget so that you customers can swap between the contracts they have access to and also return to viewing the products and pricing they're typically entitled to (what is granted by their account group). If your requirements call for contract pricing, the CloudCraze professional services team has some sample code for building this widget that you'll likely want to take advantage of. In these training orgs we do not have a contract selector built for you, so we're going to have to manually add the Price Group parameter to the URL.

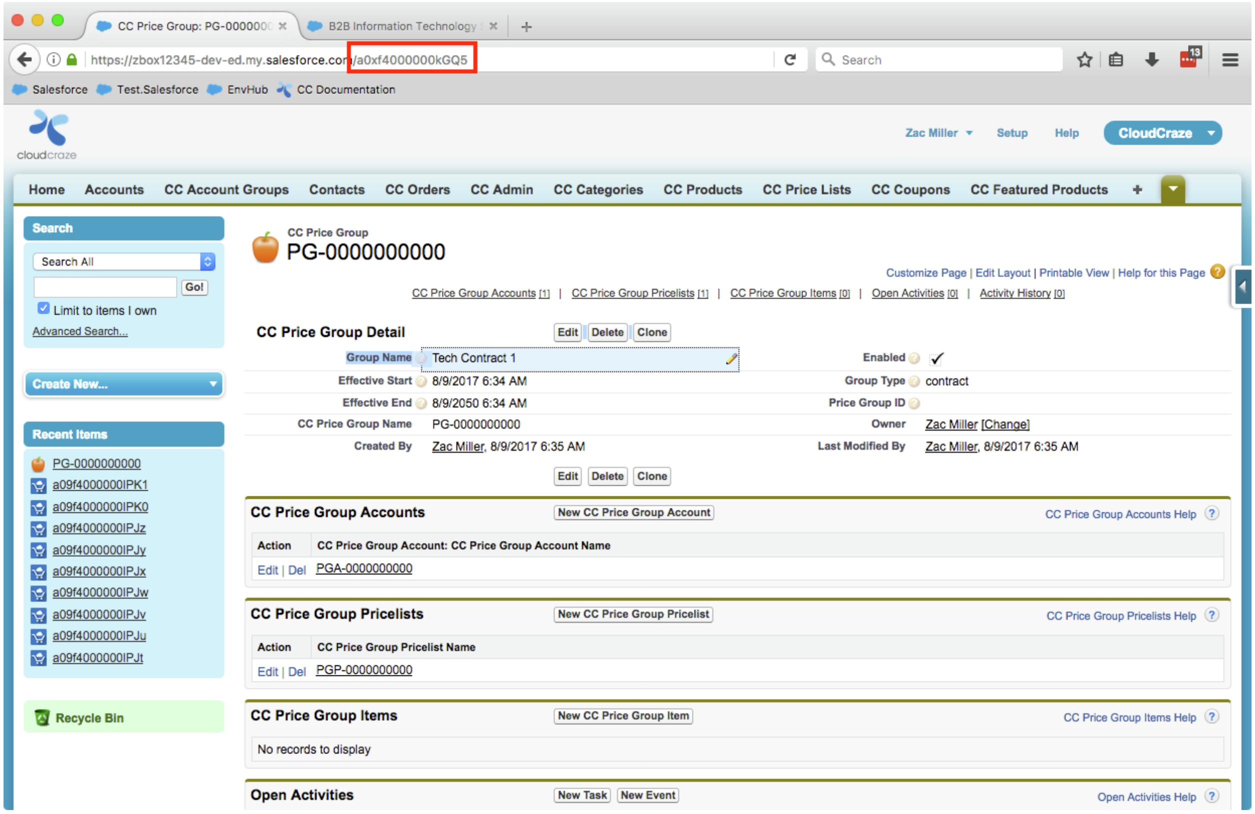
CC Exercise: Test Contract Pricing configuration

1. Navigate to the homepage of the DefaultStore storefront as a contact at the Acme account.

2. Copy the Salesforce ID of the CC Price Group we just created. You can find this at the end of the URL when viewing this record (See screenshot at the top of the next page if you're unsure where to find this. The string in the red box is the Salesforce ID).

3. Add ?**grid=XXXXXXXXXXXXXXX** to the end of the URL, replacing the **XXXXXXXXXXXXXXX** with the salesforce ID you grabbed in step 2.
    - If your CC Price Group record looked like the one above, your URL would be: https://MyDomain.force.com/DefaultStore?grid=a0xf4000000kGQ5

4. Refresh the storefront with this added parameter in the URL. You should be seeing the HP ProLiant MicroServer - Athlon II Neo N36L 1.3 GHz in the Spotlight Products section with the $249.99 price point as dictated by the contract.



Optional: To round out the exercise and meet our requirement, return to the CC Price Group record, and create a CC Price Group Item. All that is required is to specify the product and the quantity cap of how many of that product we're limiting users to purchasing off this contract. In this case you'll specify the Server product and a cap quantity of 500.

Seller Marketplace

Learning Objective…

By the end of this exercise you will understand how to set up Sellers and configure pricing based on sellers.

Exercise is for…

Functional Experts

Pre-Requisites…

- Before working through this exercise, you should be familiar with navigating Salesforce and CC Admin
- CC Pricelists

Objects Used…

- CC Priceless
- CC Sellers

Manufacturers typically offer the same products at different sellers, distribution centers, and retailers. When customers come to their site, manufacturers want to show each of the locations the customer can purchase a product and the price it costs at that dealer.

In B2B scenarios, customers often have contracts negotiated with each of the various retailers in the area. In this case, the customer should see the specific pricing they've negotiated with each seller.

For distribution and revenue calculation purposes it is necessary to split orders based on which seller each product was purchased from.

We can accomplish all of the above with the Seller Marketplace functionality in CloudCraze.

Seller locator allows users to choose a seller based on the seller's proximity to the user's location. In order to utilize this functionality a Google API Key is required. We will not be covering how to configure this feature of Seller Locator in this exercise but information on how to do so can be found in the seller locator documentation.

Industrio has a large network of distribution partners where they sell their merchandise. Based on the contracts negotiated by these partners, each offer products at different prices. Industrio would like to give the storefront user the ability to choose between sellers.

In this exercise, we will turn on the seller locator functionality and set up a new seller, Enterprise Electronics.

First, we need to turn Seller Locator on. Enabling this setting simply turns on the widget.

CC Exercise: Enable Seller Locator and Create Settings in your Storefront

1. Navigate to **CC Admin.**

2. Go to the **DefaultStore Settings** by selecting **DefaultStore** from the dropdown by **Global Settings.**

3. Click on **Configuration Settings** tab within the left hand navigation.

4. Choose **Seller Locator** from the **Module** dropdown.

5. Find the configuration **Enabled**. Click **Override** next to that setting, and set the Attribute Value to **TRUE**, and click **Create**.

Rebuild and activate a new configuration cache.

Next, we'll grant our customer profile access to the necessary Visualforce pages.

CC Exercise: Grant Access to Visualforce Pages

1. Navigate to the **Setup** menu.

2. In the left nav, search for **Profiles**.

3. Select the **CloudCraze Customer Community User** Profile.

4. Scroll to the section titled **Enabled Visualforce Page Access** and click **Edit.**

5. Move **ccrz.SellerDetail** and **ccrz.SellerListPage** to the list of enabled pages.

Click **Save.**

Next, we'll set up the profile for our new seller, **Enterprise Electronics.** Use the information in the table following these steps to create this record. There are three other sellers that have already been configured in your org.

CC Exercise: Create Seller Profile

1. Navigate to the **CC Sellers** tab. You will likely have to click on the '+' button to see additional tabs and find this particular tab.

2. Click **Go!** to see all sellers in this org.

3. Click **New CC Seller.**

4. Input the **Seller Name, Logo,** and **Short Description** as defined in the table below.

5. Make sure the record is **Enabled** and has valid **Start** and **End Dates.**

Click **Save.**

Enterprise Electronics, LLC Seller Record	
Seller Name	**Enterprise Electronics, LLC**
Logo	https://thumb1.shutterstock.com/display_pic_with_logo/2002229/277027100/stock-vector-home-electronics-appliances-circle-infographics-template-concept-icons-design-for-your-product-or-277027100.jpg
Short Description	Enterprise Electronics, LLC offers a complete selection of electronic products. From computers, monitors, storage options and much more. Everything is in-stock and ready to ship.

CC Exercise: Connect Enterprise Electronics Pricelist to Seller and Assign Seller Pricelists to Account Group

1. Navigate to the **CC Price Lists** tab.

2. Click **Go!** to see all pricelists in this org.

3. Select the **Enterprise Electronics** pricelist.

4. Click **Edit**, and Set the Seller field to **Enterprise Electronics, LLC.**

Click **Save.**

Navigate to the Tier 1 Account Group. Add the following price lists to this account group: **Enterprise Electronics, East Street Electronics, Electronics Basics, The Electronics Factory.**

Each of these seller pricelists has just one Price List Item, for the **HP Proliant MicroServer – Athlon II Neo N36L 1.3 GHz,** so that we can see the seller locator behavior.

Once all pricelists have been assigned, we need to confirm that your test user sees the price lists and seller connections we just created in the storefront. Navigate to the DefaultStore and find the **HP Proliant MicroServer – Athlon II Neo N36L 1.3 GHz**. Verify that the Price is $247.59 and the *sold by* is Electronics Basics. You should now also see a section called **Also Sold By** which includes the price list items for each of the sellers that are set up.

Lastly, we'll undo the configurations we set up in this exercise. This is to be sure the sellers functionality doesn't interfere with any of our remaining exercises.

CC Exercise: Disable Seller Locator Settings and Seller Marketplace

1. Navigate to **CC Admin.**
2. Go to the **DefaultStore Settings** by selecting **DefaultStore** from the dropdown by **Global Settings.**
3. Click on **Configuration Settings** tab within the left hand navigation.
4. Choose **Seller Locator** from the **Module** dropdown.
5. Set the Value of the **Enabled** configuration to **FALSE**.
6. Rebuild your Configuration Cache, and Activate it.
7. Return to your Tier 1 Account Group and remove each of the Sellers pricelists that we added earlier.

Effective Accounts

Learning Objective…

By the end of this exercise you'll understand how to configure and browse the storefront in an effective account scenario.

Exercise is for…

Functional Experts

Pre-Requisites…

- Understanding of Account hierarchy
- Understanding of Account entitlements

Objects Used…

- Accounts

In B2B commerce, it is often the case that we're dealing with and selling to multi-tiered organizations with complex distribution models. There are many B2B use cases where a user is visiting the storefront to order on behalf of a customer of theirs, or perhaps on behalf of a division of their company. Effective Accounts provides a way to facilitate theses scenarios.

The buying manager at Acme needs to be able to place orders on behalf of the company's Chicago and San-Francisco offices, while maintaining the ability to buy on behalf of Acme corporate. In this exercise we'll set up Effective Accounts in the Parent-Child configuration, to enable the buying manager to accomplish this.

With Effective Accounts, a parent account logs into the storefront and sets an effective account for their browsing session from the effective account picklist. The user is still browsing as their self, but the product and pricing entitlements they see will be based on the entitlements of the child effective account. This is useful if the user is buying on behalf of three child accounts that each have their own unique pricing negotiated with the seller.

The list of which child accounts a parent account has access to browse as can be set up in three different configurations: parent-child, account group, and entitled.

- Parent-child: The salesforce account hierarchy determines which account are displayed in the picklist.
- Account Group: An account has access to browse as all other accounts in their account group.
- Entitled: We grant an account specific access to browse as other accounts based on Salesforce sharing rules.

Effective Accounts is turned on or off via a configuration setting. The effective account picker can either be displayed in the header of the site or as a widget. This too is dictated by a configuration setting. The first thing we'll want to do is turn on effective accounts and configure the picker to display as a widget.

CC Exercise: Turn on Effective Accounts

1. Navigate to **CC Admin.**

2. Go to the **DefaultStore Settings** by selecting **DefaultStore** from the dropdown by **Global Settings.**

3. Click on **Configuration Settings.**

4. Choose **Effective Account** from the **Module** dropdown.

5. There are three configuration settings we are concerned with here. Configure each setting as described below and be sure to rebuild your Configuration Cache:

    - **Filter Mode:** This should be set to **ParentHierarchy** globally. If we were setting up effective accounts in the Account Group or Entitled configurations, this is where we'd set that value.
    - **Enabled:** This is set to FALSE globally. Override the setting to be **TRUE** on this storefront.
    - **Display Mode:** This is set to header globally. Override the setting to be '**widget**' on this storefront.

Return to the storefront as a contact of the Acme account and verify that the Effective Account picker now displays in the header of the page and you can switch between accounts. You should be able to switch between Acme - Chicago and Acme - San Francisco, since these accounts are already children of Acme.

After switching to one of the Children accounts, you're no longer able to switch back to the Acme parent account. The requirement in the beginning of this exercise calls for the buyer at Acme to be able to order on behalf of the Chicago and San Francisco locations in addition to the Headquarters, so we need to be able to include the parent account in our list of Effective Accounts. There is another Configuration Setting we will want to change to allow for this.

CC Exercise: Tweak Effective Accounts configuration settings

1. Navigate to **CC Admin.**
2. Go to the **DefaultStore Settings** by selecting **DefaultStore** from the dropdown by **Global Settings.**
3. Click on **Configuration Settings.**
4. Choose **Effective Account** from the **Module** dropdown.
5. To include the parent account in the list of Effective Accounts displayed in the picker, the configuration setting we'll want to change is **Assign Account.** Set the value to **Always.**

> Note: There are three options for the Assign Account configuration.
>
> - **Always:** the user's account will be displayed in the list on the UI when logging in as a child account, parent account (both before and after setting an effective account for their session), or an account that is independent of any hierarchy.
> - **OnlyEmpty:** the user's account will be displayed in the list on the UI if and only if the list of effective accounts that the user is entitled to is returned as empty (ie- the account in question is a child account or an account that is independent of an account hierarchy and is not entitled to browse as other accounts via any type of salesforce sharing rule).
> - **Never:** the user's account will never be displayed in the list on the UI. Very few specific use cases that this setting would support.

Before we build our configuration cache and return to the storefront, there's one more configuration setting we'll want to change here. Industrio wants their customers to be able to switch between each of the effective accounts they're entitled to, with each child account maintaining it's own cart. We'll need to change the Cart Mode setting to accomplish this.

6. While looking at the **Configuration Settings** for the **DefaultStore**, filter on the **Effective Accounts** module.
7. Change the value for CartMode here to **CartPerAccount**.

Rebuild the configuration cache and return to the storefront as a contact of the Acme account. You should now be able to switch to a child account and back to the Acme parent account.

Add something to your cart while browsing as the Acme account, then switch to a child account. Your cart should be empty now. Switch back to the Acme account. You should see whatever you added before back in your cart, as the active cart switches as you switch account context.

Line Level Independence

Learning Objective…

By the end of this exercise you will understand how to set up and use Line Level Independence to split your order into multiple shipping groups

Exercise is for…

Functional Experts

Pre-Requisites…

- Before working through this exercise, you should be familiar with navigating Salesforce.

Objects Used…

- None

In this exercise you will learn how to enable the Line Level Independence checkout flow.

Line level Independence enables an alternative checkout flow in which the storefront user can create multiple shipping groups within an order when checking out. Once the user splits his cart items into groups, he or she can then assign a unique shipping address, shipping method, and delivery date for each of the groups.

Many of Industrio's customers are regional managers who are in charge of ordering for several different stores within their region. Billing should be managed centrally by the company headquarters, but shipments need to be split into separate groups to arrive at each of the locations that the manager is ordering for.

In this exercise we will enable Line Level Independence, step through the creation of shipping groups in the checkout flow, and utilize several methods to move order items between shipping groups.

CC Exercise: Enable Line Level Independence

1. Navigate to **CC Admin.**
2. Go to the **DefaultStore Settings** by selecting **DefaultStore** from the dropdown by **Global Settings.**
3. Click on the **Configuration Settings** tab within the left hand navigation.
4. Choose **Checkout** from the **Module** dropdown.
5. Find the configuration **Use Line Level Independence**. Click **Override** next to that setting, and set the Attribute Value to **TRUE**, and click **Create**.

You must now rebuild and activate a new configuration cache.

CC Exercise: Enable ccrz.CheckOut Visualforce Page for your test user's profile

1. In your CloudCraze training Org, navigate to **Setup**.
2. In the **Search Bar** in the left nav, search for and select **Profiles**.
3. Find and click on **CloudCraze Customer Community User**.
4. Find the **Enabled Visualforce Page Access** section and click **Edit**.
5. Under the **Available Visualforce Pages** area you will find the page **ccrz.CheckOut**, select that page and add it to the list of **Enabled Visualforce Pages**, and click **Save**.

CC Exercise: Create Multiple Shipping Groups

1. Navigate to the storefront with your test user.
2. Add several (5-10) standard products to your cart in quantities greater than 1 (5-20).

3. Navigate to your cart, and click checkout. This will take you to the LLI checkout page.

4. Click the button at the bottom of the LLI checkout page that reads, **+ Add Shipping Group**.

5. A modal will be displayed allowing you to populate the fields for a new shipping group. Fill out the fields in the modal and click **Save.**

Repeat the steps above to create as many shipping groups as you'd like.

The shipping group you just created should now appear on the checkout page with the details you provided in the modal being displayed.

CC Exercise: Move Order Items into different shipping groups via Cart Items Section

Now that you've created multiple shipping groups you can begin to move order items between those shipping groups. On the right hand side of the LLI Checkout flow you should notice a section called Cart Items. This section contains all the line items from your cart. This section can only be used to move the **entire quantity** of order line items.

1. In the cart items section click on the **check box** next to one or multiple order line items you wish to move to a new shipping group, then click the button **Move Items**.

2. A modal will be displayed allowing you to select the shipping group to which you would like to move the order items. Select one of the shipping groups you just created.

    - This modal also gives you the option to 'Combine Lines if Matching Product is Present'. Selecting this check box simply adds the total quantity of the products being moved to an existing order line item in the new shipping group if one already exists. Check this box if you wish to do so.

    - This modal also gives you the option to create a new shipping group during the process of moving line items. If you wish to add a new shipping group simply select that option from the drop down.

3. Once you have selected your options on the modal, click **Move Items**.

Notice that the Shipping details page now reflects the movement of the order line items to the shipping group that you selected.

CC Exercise: Move different quantities of Order Items into different shipping groups via Order Line Items

We can also split up Order Line Items using the **Move** link that appears under each order item in the shipping groups. Using this move link, you can move partial quantities of the line items within your cart. Splitting quantities of order line items will create a new line item in the cart which can later be condensed back into one line item with the 'Combine Lines if Matching Product is Present' checkbox, if you so desire.

1. Find an order line item you would like to move a partial quantity of. Click the **Move** link under that item.

2. A modal will be displayed allowing you to choose the quantity of the order line item you would like to move, as well as select the shipping group to which you would like to move the order items. Select one of the shipping groups you just created.

    - This modal also gives you the option to 'Combine Lines if Matching Product is Present'. Selecting this check box simply adds the total quantity of the products being moved to an existing order line item in the new shipping group if one already exists. Check this box if you wish to do so.

    - This modal also gives you the option to add a new shipping group during the process of moving line items, if you wish to add a new shipping group simply select that option from the drop down.

3. Once you have selected your options on the modal, click **Move Items**.

Notice that the Shipping details page now reflects the movement of the order line items to the shipping group that you selected, and in the quantity which you specified. Try moving a partial quantity to a shipping group which already contains the product you are moving and without selecting the 'Combine Lines if Matching Product is Present' checkbox.

Also notice that each shipping group has its own request date and shipping notes fields, these fields can be configured to display or not using configuration settings. Once you have adjusted your order into different shipping groups step through the LLI checkout and process your order as normal.

Navigate to CC Orders, click on the order you just created, then click **Edit Layout**. Add the related list for Order Item Groups to the CC Order layout and click **Save**. The order you just placed should have multiple entries, one for each shipping group containing order items, under Order Item Groups. It is in these records that the specific ship to and order item records pertaining to that shipping group are specified. These records also reference the parent order and shipping group name for traceability.

Product Compare

Learning Objective…

By the end of this exercise you will understand how to empower your customers to compare similar products product on the storefront.

Exercise is for…

Functional Experts

Pre-Requisites…

- Before working through this exercise, you should be familiar with navigating Salesforce and CC Admin.

Objects Used…

- CC Specs
- CC Products

In this exercise you will learn how to enable and configure Product Compare in your storefront.

Customers are constantly making decisions on one product vs a related product. These products may have similar specifications but perhaps they are from a different manufacture or produced in a different year. With product compare your customers can compare the features of up to four products and their specifications side-by-side to make their analysis a little simpler. Product compare highlights the differences between products so they stand out to show what makes each product unique.

Industrio sells servers. Customers of Industrio decide which servers to buy based on devices that offer a minimum Per Processor Size of 6 MB. By utilizing product compare customers can choose the servers they are interested in and are able to quickly compare them based on Per Processor Size and eliminate those that do not meet the minimum requirement, while also being able to add qualifying servers to their cart.

When customers come to the site, it is important to make it easy for them to navigate the site and find the best products for their specific needs. The Product Comparison feature aims help customers make informed decisions.

The Product Comparison page allows customers to compare the features of up to four (4) products by displaying product specifications and price side-by-side on an easy-to-read table. The smart and user-friendly interface highlights the rows in which the product specifications differ, allowing the customer to focus on what makes each product unique. Once they have made their decision, customers can add items to the cart directly from the Product Compare page.

CC Exercise: Enable Product Compare in your Storefront

1. Navigate to **CC Admin.**

2. Go to the **DefaultStore Settings** by selecting **DefaultStore** from the dropdown by **Global Settings.**

3. Click on **Configuration Settings.**

4. Choose **Product Compare** from the **Module** dropdown.

5. Find the configuration **'Enabled.'** Click **Override** next to that setting, and set the Attribute Value to **TRUE**, and click **Create**.

6. Rebuild your Configuration Cache.

Product Compare uses CC Specs to compare products in the storefront. Any products that we want to be available to select when using the product compare tool need to have CC Specs that have the IsComparable field checked. In your training org, several products have already been configured to have these boxes checked on particular specs.

CC Exercise: Compare products in your Storefront

1. Navigate to your Storefront and click on the category **Servers**. Again, Servers has been chosen because that category has been pre-configured with comparable CC Specs.

2. Since you now have Product Compare (enable) set to TRUE, you will notice a button that says **+ Compare** next to each product with eligible comparable CC Specs, on the Product list page. Click **+ Compare** for each product that you wish to compare (limit 4).

3. When you click **+ Compare** you will notice that a modal pops up at the bottom of the storefront indicating the products that have been selected for comparison. Once you have added 2 or more products to be compared a button labeled **Compare Products** will be displayed in that modal. Click **Compare Products** to be taken to the product compare page. Here you will see a product comparison of the servers you selected.

Storefront Associations

Learning Objective…

By the end of this exercise you should be able to enable and configure basic Storefront Associations within your CloudCraze Org.

Exercise is for…

Functional Experts

Pre-Requisites…

- Understanding of standard community and storefront relationship.

Objects Used…

- CC Storefront Association

In this exercise we will familiarize ourselves with the concept of Storefront Associations within CloudCraze, their use cases and and how they are setup and configured.

When enabled, Storefront Associations act as the primary mechanism within CloudCraze to determine which CloudCraze Storefronts are associated to each SFDC Community. Additionally, in the case where more than one storefront resides on a single Community, they also determine which Storefront acts as the Default Storefront (i.e. which storefront appears if the user navigates to the base URL of the community)

Secondarily, Storefront Associations can also be used to limit which users have access to a given storefront on a community either based on their account or account group.

The enabling of Storefront Associations and whether to filter access to storefronts based on account and account groups cal all be done via Configuration Settings found in CC Admin.

CC Exercise: Clone Your DefaultStore

1. In your CloudCraze training Org, navigate to **CC Admin**.
2. From the left panel, select **Storefronts.**
3. Click the '**Clone**' button by the DefaultStore.
4. In the Clone Storefront modal that appears, name the new storefront **MyStore** and click 'Clone.'
5. Enable the '**CC_MyStore_Theme**' theme for the newly created **MyStore**. This will allow you to visually differentiate between your storefronts.
6. Rebuild your Configuration Cache.

To verify that the newly created MyStore is accessible, return to the DefaultStore homepage and add '**/?store=MyStore**' to that URL. This adds a storefront parameter to the URL. If you've successfully created your new storefront, you should see the MyStore Theme.

CC Exercise: Enable Storefront Associations via Configuration Settings

1. In your CloudCraze training Org, navigate to **CC Admin.**
2. In CC Admin, click on Configuration Settings. **Storefront Associations must be turned on Globally**, so we want to do this from the Global Settings, rather than the storefront settings.
3. In Configurations Settings, filter by the '**Storefront Associations**' Module.
4. Find the **SA Enabled** configuration, modify it to **TRUE** and click the accept button.
5. Find the **SA Check Community** setting, Modify it to **TRUE**, and click the accept button.
6. Navigate to Configuration Cache Management in CC Admin, Build a new cache, and activate the cache when ready.

With SA.Enabled set to TRUE, CloudCraze looks at the 3 Configuration Settings for SA Checks. When set to TRUE, the behavior of each is:

- **SA Check Community** checks for an SA record associating the community and storefront
- **SA Check Account** checks for an SA record associating the account, community, and storefront
- **SA Check Account Group** checks for an SA record associating the account group, community, and storefront

With Storefront Associations Enabled, SA Check Community will need to be set to true at a minimum. Since SA is turned on globally, we'll need a storefront association record to tie each storefront to it's respective community.

Check your work by navigating to the DefaultStore Homepage. You should see a **'File Not Found'** page because we have not created any CC Storefront Association records. This is because we're accessing the community page but there is not a storefront association created for this storefront and community

CC Exercise: Create a New Storefront Association for the DefaultStore storefront

In this exercise we will create a new CC Storefront Association record connecting the DefaultStore community and the DefaultStore storefront.

In the CC Storefront Association object you will see a number of available fields, however, not all these fields will work together. Please consult product documentation for a further understanding on which combinations will result in expected results

1. In your CloudCraze training Org, navigate to the CC Storefront Association Tab.
2. Click 'New' to create a new CC Storefront Association record.
3. For the **CC StorefrontAssociation Name** enter '**DefaultStore'.**
4. For the **Community Name** enter '**DefaultStore Community'.**
5. For the **Storefront** enter '**DefaultStore'.**
6. Activate the **'Default'** flag.

Click **Save.**

Marking a CC Storefront Association record as 'Default' results in that storefront being presented if the user navigates to the community root URL

Check your work by navigating to the root URL of the community (Hint: if you are simply refreshing your storefront, be sure to remove the /ccrz_FileNotFound parameter from the URL). The DefaultStore storefront should now display. If you add the **/?store=MyStore**' parameter to the URL you should still receive a **'File Not Found'** page.

CC Exercise: Create a New Storefront Association for the MyStore storefront

In this exercise we will create a new CC Storefront Association record connecting the DefaultStore community and the MyStore storefront.

1. In your CloudCraze training Org, navigate to the **CC Storefront Association Tab.**
2. Click 'New' to create a new CC Storefront Association record.
3. For the **CC StorefrontAssociation Name** enter '**MyStore'.**
4. For the **Community** enter '**DefaultStore Community'.**
5. For the **Storefront** enter '**MyStore'.**
6. Check your work by navigating to the root URL of the community and adding the '**/?store=MyStore**' parameter. You should see the MyStore Storefront theme.

CloudCraze Community Setup

Learning Objective…

By the end of this exercise you will understand the advanced community settings and how they pertain to CloudCraze. You'll also be able to setup a new SFDC Community for use with a CloudCraze Storefront.

Exercise is for…

Functional Experts

Pre-Requisites…

- You should be familiar with navigating Salesforce.
- You should have completed the Storefront Associations exercise.

Objects Used…

- None

This exercise will cover the Community Setup steps necessary to create a community that can be used in a CloudCraze implementation. Many of these steps are typically completed during a fresh installation of CloudCraze.

CloudCraze Storefronts sit atop Salesforce Communities. As a result, in order to have a Storefront one must first successfully create and setup a Salesforce community with configurations that are compatible with CloudCraze.

Once the community is created, new storefronts can be created or existing storefronts can be assigned for use with a particular community. In this exercise, we will create a new community and assign the MyStore storefront (created in the Storefront Associations exercise) to this community.

CC Exercise: Create a New Community

1. In your CloudCraze training Org, navigate to **Setup**.

2. In the **Search Bar** in the left nav, search for and select **All Communities.**

> Notice how there is already a community in your Org:
>
> - **DefaultStore Community** which has been hosting the DefaultStore we've used up to this point in other Functional Training exercises.

3. Click the **New Community** button**.**

4. On the next page, choose your template. CloudCraze is currently only supported on communities using the **Salesforce Tabs + VisualForce** template. Select this option and on the next page click **Get Started**.

5. Name the Community '**MyCommunity**'.

6. In the URL Path, enter '**MyCommunity**'.

7. Click **Create.**

8. Once SFDC is done creating your new Community you will be taken to the **Community Workspaces.**

For each Community being used to house CloudCraze storefronts, it is best practice to have a separate User Profile. By Default CloudCraze comes with the **CloudCraze Customer Community User** Profile predefined. In your training Org, this Profile is being used by the **DefaultStore Community**. In the next exercise will be Cloning this Profile for use with the newly created **My Store.**

CC Exercise: Create a New Customer Community User Profile

1. Navigate back to **Setup** in your CloudCraze training Org.

2. In the **Search Bar** in the left nav, search for and select **Profiles.**

3. Find the **CloudCraze Customer Community User** Profile and click on it.

4. Next, Click the **Clone** button.

5. In the **Profile Name** field enter '**MyStore Customer Community User**'

Click **Save.**

Now that we have a User Profile specifically for our newly created MyStore Community, we can now assign it.

CC Exercise: Assign a Profile to your Community

1. In your CloudCraze training Org, navigate to **Setup**.
2. In the **Search Bar** in the left nav, search for and select **All Communities.**
3. Next to **MyCommunity,** click on the **Workspaces** button.
4. Click on **Administration.**
5. **I**n the left navigation menu, find **Members** and click on it.
6. In the Select Profiles section, adjust the search filter to view **All.** Find the **MyStore Customer Community User** and move it from the list of Available Profiles to the list of Selected Profiles.

Click **Save.**

Another important piece to successfully setting up a Community for use with CloudCraze is ensuring the **Public Access Settings** are properly configured. By default, the only item which needs to be edited its the '**eComm Currency**' field for the **Site Guest User**. This field, on the **Site Guest User,** is used to define what currency Anonymous Customers should see if their browser locale is not in the list of enabled languages or currencies for the storefront.

CC Exercise: Adjust Public Access Settings

1. In your CloudCraze training Org, navigate to your **MyCommunity** Workspace.
2. In Workspaces, click on **Administration**
3. Next, in the left hand menu find **Pages** and click on it
4. Under **Advanced Configurations,** click on the '**Go to Force.com'**

5. Next, click on the **Public Access Settings** button

6. From the **My Community Profile** page, Click on the '**View Users'** button.

7. Find the **Site Guest User** and click the **Edit** action link.

8. in the **User Edit** page, find the **Currency** field and enter '**USD**'

Click **Save.**

Now that we have properly defined our User settings for our Community, the next steps are to add the CloudCraze VisualForce pages to the Community and define the default pages on the Community for Errors, Home Page, Login and Registration.

CC Exercise: Enable CloudCraze Specific VisualForce Pages

1. In your CloudCraze training Org, navigate to your **MyCommunity** Workspace.

2. In Workspaces, click on **Administration.**

3. Next, in the left hand menu find **Pages** and click on it.

4. Under **Advanced Configurations,** click on the '**Go to Force.com'.**

5. Scroll down on the Site Details page until you reach the **Site Visualforce Pages.**

6. Click the **Edit** Button.

7. Move the Following pages from the **Available Visualforce Pages** list to the **Enabled Visualforce Pages** list:

    - ccrz.CCChangePassword
    - ccrz.CCException
    - ccrz.CCFileNotFound
    - ccrz.CCForgotPassword
    - ccrz.CCInMaintenance
    - ccrz.CCSiteLogin
    - ccrz.CCUnauthorized
    - ccrz.CCUnderConstruction
    - ccrz.PageLabels

Click **Save.**

CC Exercise: Setup CloudCraze Error Pages

1. In your CloudCraze training Org, navigate to your **MyCommunity** Workspace.
2. In Workspaces, click on **Administration.**
3. Next, in the left hand menu find **Pages** and click on it.
4. Under **Advanced Configurations,** click on the '**Go to Force.com'.**
5. Scroll down on the Site Details page until you reach the **Error Pages** Section.
6. Click on the **Page Assignments** button.
7. For the **Authorization Required Page** assign the '**CCSiteLogin**' page.
8. For the **Limit Exceeded Page** assign the '**CCBandwidthExceeded**' page.
9. For the **Maintenance Page** assign the '**CCInMaintenance**' page.
10. For the **Page Not Found Page** assign the '**CCFileNotFound**' page.
11. For the **Generic Error Page** assign the '**CCException**' page.

Click **Save.**

CC Exercise: Setup CloudCraze Home Page

1. In your CloudCraze training Org, navigate to your **MyCommunity** Workspace.
2. In Workspaces, click on **Administration**
3. Next, in the left hand menu find **Pages** and click on it
4. In the **Community Home** dropdown Select **Visualforce Page** then assign the '**HomePage**' page using the magnifying glass button

Click **Save.**

CC Exercise: Setup CloudCraze Login, Forgot Password and Change Password Pages

1. In your CloudCraze training Org, navigate to your **MyCommunity** Workspace.

2. In Workspaces, click on **Administration.**

3. Next, in the left hand menu find **Login & Registration** and click on it.

4. In the **Login** Section find the **Page** dropdown Select **Visualforce Page** then assign the '**CCSiteLogin**' using the magnifying glass button.

5. In the **Password** Section find the **Forgot Password** dropdown Select **Visualforce Page** then assign the '**CCForgotPassword**' page using the magnifying glass button.

6. In the **Password** Section find the **Change Password** dropdown Select **Visualforce Page** then assign the '**CCChangePassword**' page using the magnifying glass button.

Click **Save.**

That completes the setup of the Community for use with CloudCraze. The only thing remaining is to activate the Community.

CC Exercise: Activate Your Community

1. In your CloudCraze training Org, navigate to your **MyCommunity** Workspace.

2. From the **Settings** page, Click the **Activate Community** button.

If you've been following the exercise guide up to this point, you'll remember that we setup Storefront Associations to allow us to access the **MyStore** storefront via the **MyCommunity** Community.

CC Exercise: Associate MyCommunity to MyStore

1. In your CloudCraze training Org, navigate to the **CC Storefront Association Tab.**

2. Find your **MyStore** CC Storefront Association record.

3. Edit the **Community Name** to be '**MyCommunity'.**

4. Check the flag to make this the **Default** storefront for the community**.**

Click **Save.**

Check your work by navigating to the root URL of the community and ensure the **MyStore Storefront** appears.