



**SOLUTIONS ARCHITECT**

# Managing Accounts

---

Liferay  
 **Commerce**

# Managing Accounts

## Tasks to Accomplish

- Create business accounts
- Manage permissions within accounts with account roles

## Exercise Prerequisites

- Java JDK installed to run Liferay
  - Download here: <https://www.oracle.com/technetwork/java/javase/downloads/jdk11-downloads-5066655.html>
  - Instructions on installation here: [https://www.java.com/en/download/help/download\\_options.xml](https://www.java.com/en/download/help/download_options.xml)
- Unzipped module exercise files in the following folder structure:
  - Windows: `C:\liferay`
  - Unix Systems: `[user-home]/liferay`
- A Liferay DXP or CE 7.2 instance up and running
- Liferay Commerce 2.1 installed on your instance of Liferay DXP
  - An installation overview can be found here: <https://learn.liferay.com/commerce-2.x/installation-and-upgrades/installation-overview.html>

# Table of Contents

- [Creating and Managing Accounts](#)
- [Create a Custom Account Role](#)
- [Managing Accounts Module Quiz](#)
- [Answer Key](#)

# Creating and Managing Accounts

## Exercise Goals

- Create User Accounts for Minium employees and customers
- Create Business Accounts for Speedy Auto Service HQ and Connolly Repairs
- Add Users to the Speedy Auto Service HQ and Connolly Repairs Business Accounts
- Create a US West Coast Account Group

## Create a User Account for Dwayne Mills

1. **Go to** *Control Panel > Users > Users and Organizations*.
  - Make sure that *Users* is selected at the top of the screen.
2. **Click** the *Add* button (blue plus sign at the top right of the screen).
3. **Type** `dwayne.mills` for the *Screen Name*.
4. **Type** `dwayne.mills@speedyauto.com` for the *Email Address*.
5. **Type** `Dwayne` for *First Name*.
6. **Type** `Mills` for *Last Name*.
7. **Click** the *Save* button at the bottom of the page.
8. **Click** *Password* on the left of the page.
9. **Type** a password for Dwayne's account in the *New Password* and *Enter Again* fields.
  - For sake of convenience you can use something simple like *test* or *password*.
10. **Click** *Save*.
11. **Click** *Memberships* on the left of the page.
12. **Click** the *Select* button directly across from *Sites*.
13. **Choose** *Minium Automotive*.
14. **Click** *Save*.

The screenshot shows a user profile form titled 'Information'. It is divided into two sections: 'USER DISPLAY DATA' and 'PERSONAL INFORMATION'. In the 'USER DISPLAY DATA' section, there are fields for 'Screen Name' (dwayne.mills), 'Email Address' (dwayne.mills@speedyauto.com), and 'User ID' (50392). To the right of these fields is a placeholder for a profile picture and two buttons: 'Change' and 'Delete'. The 'PERSONAL INFORMATION' section has a 'Language' dropdown menu set to 'English (United States)' and an empty 'Job Title' field.

## Create a User Account for Mia Brewster

1. **Go to** *Control Panel > Users > Users and Organizations*.
  - Make sure that *Users* is selected at the top of the screen.
2. **Click** the *Add* button (blue plus sign at the top right of the screen).
3. **Type** mia.brewster for the *Screen Name*.
4. **Type** mia.brewster@speedyauto.com for the *Email Address*.
5. **Type** Mia for *First Name*.
6. **Type** Brewster for *Last Name*.
7. **Click** the *Save* button at the bottom of the page.
8. **Click** *Password* on the left of the page.
9. **Type** a password for Mia's account in the *New Password* and *Enter Again* fields.
  - For sake of convenience you can use something simple like *test* or *password*.
10. **Click** *Save*.
11. **Click** *Memberships* on the left of the page.
12. **Click** the *Select* button directly across from *Sites*.
13. **Choose** *Minium Automotive*.
14. **Click** *Save*.

This screenshot shows the same 'Information' user profile form, but now populated with data for Mia Brewster. The 'Screen Name' field contains 'mia.brewster', the 'Email Address' field contains 'mia.brewster@speedyauto.com', and the 'User ID' field contains '50404'. The 'PERSONAL INFORMATION' section remains the same with 'Language' set to 'English (United States)' and an empty 'Job Title' field.

## Create a User Account for Paul Hudson

1. Go to *Control Panel > Users > Users and Organizations*.
  - Make sure that *Users* is selected at the top of the screen.
2. Click the *Add* button (blue plus sign at the top right of the screen).
3. Type `paul.hudson` for the *Screen Name*.
4. Type `paul.hudson@conrepair.com` for the *Email Address*.
5. Type `Paul` for *First Name*.
6. Type `Hudson` for *Last Name*.
7. Click the *Save* button at the bottom of the page.
8. Click *Password* on the left of the page.
9. Type a password for Paul's account in the *New Password* and *Enter Again* fields.
  - For sake of convenience you can use something simple like *test* or *password*.
10. Click *Save*.
11. Click *Memberships* on the left of the page.
12. Click the *Select* button directly across from *Sites*.
13. Choose *Minium Automotive*.
14. Click *Save*.

### Information

USER DISPLAY DATA

Screen Name \*

paul.hudson

Email Address \*

paul.hudson@conrepair.com

ChangeDelete

User ID

42381

PERSONAL INFORMATION

Language

English (United States)

Job Title

Prefix

Birthday

01/01/1970

First Name \*

Paul

Create a User Account for Sally Hunt

1. **Go to** *Control Panel > Users > Users and Organizations*.
  - Make sure that *Users* is selected at the top of the screen.
2. **Click** the *Add* button (blue plus sign at the top right of the screen).
3. **Type** `sally.hunt` for the *Screen Name*.
4. **Type** `sally.hunt@conrepair.com` for the *Email Address*.
5. **Type** `Sally` for *First Name*.
6. **Type** `Hunt` for *Last Name*.
7. **Click** the *Save* button at the bottom of the page.
8. **Click** *Password* on the left of the page.
9. **Type** a password for Sally's account in the *New Password* and *Enter Again* fields.
  - For sake of convenience you can use something simple like *test* or *password*.
10. **Click** *Save*.
11. **Click** *Memberships* on the left of the page.
12. **Click** the *Select* button directly across from *Sites*.
13. **Choose** *Minium Automotive*.
14. **Click** *Save*.

## Information

### USER DISPLAY DATA

---

Screen Name \*

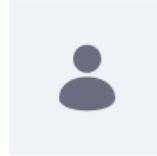
sally.hunt

Email Address \*

sally.hunt@conrepair.com

User ID

42407



Change

Delete

### PERSONAL INFORMATION

---

Language

English (United States)

Job Title

Prefix

Birthday

First Name \*

Sally

Create a User Account for Gloria Davis



1. Go to *Control Panel > Users > Users and Organizations*.
  - Make sure that *Users* is selected at the top of the screen.
2. Click the *Add* button (blue plus sign at the top right of the screen).
3. Type `gloria.davis` for the *Screen Name*.
4. Type `gloria.davis@minium.com` for the *Email Address*.
5. Type `Gloria` for *First Name*.
6. Type `Davis` for *Last Name*.
7. Click the *Save* button at the bottom of the page.
8. Click *Password* on the left of the page.
9. Type a password for Gloria's account in the *New Password* and *Enter Again* fields.
  - For sake of convenience you can use something simple like *test* or *password*.
10. Click *Save*.
11. Click *Memberships* on the left of the page.
12. Click the *Select* button directly across from *Sites*.
13. Choose *Minium Automotive*.
14. Click *Save*.

## Create a West Coast Organization

1. Go to *Control Panel > Users > Users and Organizations*.
2. Click the *Organizations* tab.
3. Click the *Add* icon.
4. Type `West Coast` for *Name*.
5. Choose *United States* for *Country*.
6. Click *Save*.

## Assign Gloria Davis to the West Coast Organization

1. Go to *Control Panel > Users > Users and Organizations*.
2. Click *Gloria Davis*.
3. Click *Organizations* on the left of the screen.
4. Click *Select*.
5. Click *Choose* next to *West Coast*.
6. Click *Save*.

The screenshot shows the 'Edit User Gloria Davis' interface. The top navigation bar includes a back arrow, a hamburger menu icon, and the title 'Edit User Gloria Davis' with a help icon. Below the navigation bar are three tabs: 'General' (selected), 'Contact', and 'Preferences'. On the left side, there is a sidebar menu with the following items: 'Information', 'Organizations' (highlighted), 'Memberships', 'Roles', 'Profile and Dashboard', 'Password', and 'Apps'. The main content area is titled 'Organizations' and contains a table with the following structure:

Name	Type	Roles
West Coast	Organization	⊗

Below the table are two buttons: 'Save' (blue) and 'Cancel' (grey). A 'Select' button is located in the top right corner of the 'Organizations' section.

## Create a Business Account for Speedy Auto Services HQ

1. Go to *Control Panel > Users > Accounts*.
2. Click the *Add* icon (blue plus sign at the top right of the screen).
3. Type *Speedy Auto Services HQ* for *Name*.
4. Choose *Business* for *Type*
5. Click *Save*.

Name \*

Speedy Auto Services HQ

Email

Type


Business

VAT Number

☒ Active

Save

Cancel



Change

Delete

Default Billing

Default Shipping

## Add Dwayne Mills and Mia Brewster to the Speedy Auto Services HQ Account

1. Click *Users* on the left of the page.
2. Click the *Add* icon (blue plus sign at the top right of the screen).
3. Select *Dwayne Mills* and *Mia Brewster*.
4. Click *Add*.

Detail

Users

Organizations

Addresses

All

ID	Name	Roles
<div><div></div></div> 50392	Dwayne Mills	<div><div></div></div>
<div><div></div></div> 50404	Mia Brewster	<div><div></div></div>

## Add an Address for the Speedy Auto Services HQ Account

1. Click *Addresses* on the left of the page.
2. Click the *Add* icon (blue plus sign at the top right of the screen).
3. Type `Speedy Auto Services HQ` for *Name*.
4. Type `1245 Toretto Avenue` for *Street 1*.
5. Type `Los Angeles` for *City*.
6. Type `90212` for *Postal Code*.
7. Choose *United States* for *Country*.
8. Choose *California* for *Region*.
9. Click *Save*.

Name	Type	Street 1	City	Zip
<input type="checkbox"/> Speedy Auto Services HQ	Billing and Shipping	1245 Toretto Avenue	Los Angeles	90212

## Assign the Speedy Auto Services HQ Account to the West Coast Organization

1. Click *Organizations* on the left of the page.
2. Click the *Add* icon.
3. Check the box next to *West Coast*.
4. Click *Add*

ID	Name
<input type="checkbox"/> 35301	West Coast

## Assign Mia Brewster the Buyer Account Role

1. Go to *Control Panel > Users > Users and Organizations*.
2. Click the *Options* icon (three dots) next to Mia Brewster.
3. Click *Edit*.
4. Click *Roles* on the left of the page.
5. Click the *Select* button next to Site Roles.
6. Click the *Choose* button next to the Buyer role.
7. Click *Save*.

## Roles

### REGULAR ROLES

Select

This user is not assigned any regular roles.

### ORGANIZATION ROLES

This user does not belong to an organization to which an organization role can be assigned.

### SITE ROLES

Select

Title	Site	
Buyer	Minium Automotive	⊗

Save

Cancel

Create a Business Account for Connolly Repairs

1. Go to *Control Panel > Users > Accounts*.
2. Click the *Add* icon (blue plus sign at the top right of the screen).
3. Type *Connolly Repairs* for *Name*.
4. Choose *Business* for *Type*
5. Click *Save*.

Name <sup>\*</sup>

Connolly Repairs

Email

Change Delete

Type

Business

Default Billing

VAT Number

Default Shipping

☒ Active

Save Cancel

## Add Paul Hudson and Sally Hunt to the Connolly Repairs Account

1. Go to *Control Panel > Users > Accounts*.
2. Click *Connolly Repairs*.
3. Click *Users* on the left of the page.
4. Click the *Add* button (blue plus sign at the top right of the screen).
5. Select *Paul Hudson* and *Sally Hunt*.
6. Click *Add*.

Detail

Users

Organizations

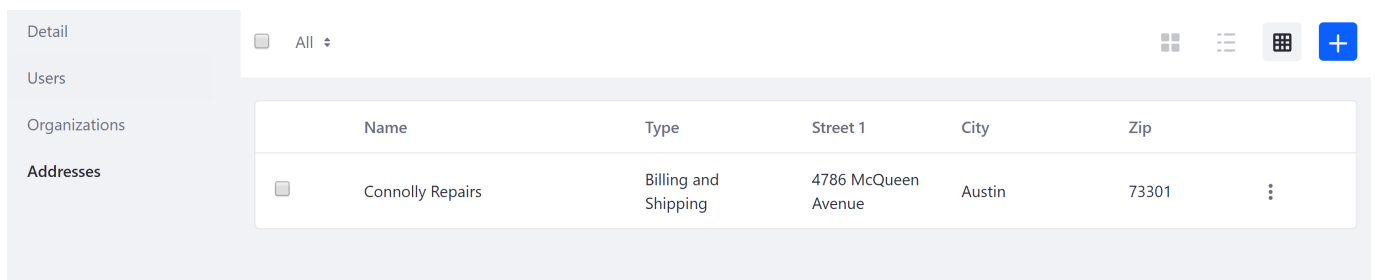
Addresses

All

ID	Name	Roles
<input type="checkbox"/> 50417	Paul Hudson	...
<input type="checkbox"/> 50430	Sally Hunt	...

## Add an Address for the Connolly Repairs Account

1. Click *Addresses* on the left of the page.
2. Click the *Add* icon (blue plus sign at the top right of the screen).
3. Type `Connolly Repairs` for *Name*.
4. Type `4786 McQueen Avenue` for *Street 1*.
5. Type `Austin` for *City*.
6. Type `73301` for *Postal Code*.
7. Choose *United States* for *Country*.
8. Choose *Texas* for *Region*.
9. Click *Save*.



Detail		All					
Users							
Organizations							
Addresses							
Name	Type	Street 1	City	Zip			
<input type="checkbox"/> Connolly Repairs	Billing and Shipping	4786 McQueen Avenue	Austin	73301			

## Assign Paul Hudson the Buyer Account Role

1. Go to *Control Panel > Users > Users and Organizations*.
2. Click the *Options* icon (three dots) next to Paul Hudson.
3. Choose *Edit*.
4. Click *Roles* on the left of the page.
5. Click the *Select* button next to Site Roles.
6. Click the *Choose* button next to the Buyer role.
7. Click *Save*.

## Roles

### REGULAR ROLES

Select

This user is not assigned any regular roles.

### ORGANIZATION ROLES

This user does not belong to an organization to which an organization role can be assigned.

### SITE ROLES

Select

Title	Site	
Buyer	Minium Automotive	⊗

Save

Cancel

## Assign Sally Hunt the Account Administrator Role

1. **Go to** *Control Panel > Users > Users and Organizations*.
2. **Click** the *Options* icon (three dots) next to Sally Hunt.
3. **Choose** *Edit*.
4. **Click** *Roles* on the left of the page.
5. **Click** the *Select* button next to Site Roles.
6. **Click** the *Choose* button next to the Account Manager role.
7. **Click** *Save*.



## Roles

### REGULAR ROLES

Select


This user is not assigned any regular roles.

### ORGANIZATION ROLES

This user does not belong to an organization to which an organization role can be assigned.

### SITE ROLES

Select

Title	Site
Account Administrator	Minium Automotive 

Save

Cancel

## Create a Gold Tier Customers Account Group

1. **Go to** *Control Panel > Users > Account Groups*.
2. **Click** the *Add* icon (blue plus sign in upper left).
3. **Type** *Gold Tier Customers* for *Name*.
4. **Click** *Save*.
5. **Click** *Accounts* on the left.
6. **Click** the *Add* icon.
7. **Choose** *Speedy Auto Services HQ*.
8. **Click** *Add*.

Account Groups

All ▾

Search

Name	System
<div><div></div>Gold Tier Customers</div>	false <div></div>

## Bonus Exercises:

1. Create a Business Account for CC West and add the new Users Mike Smith and Brenda Collins to the account.
2. For Connolly Repairs, change the existing address to a shipping address and add 6906 Main Street Smalltown, Oklahoma, 56834 as a separate billing address.

# Create a Custom Account Role

## Exercise Goals

- Create a Custom Account Role for a Purchasing Manager that allows a User to do the following:
  - View All Orders
  - Delete Orders
  - Approve Open Orders
  - Checkout Open Orders

## Create a New Purchasing Manager Account Role

1. **Open** the *Menu*.
2. **Go to** *Control Panel > Users > Roles*.
3. **Click** the *Site Roles* tab.
4. **Click** the *Add* icon at the top right.
5. **Type** `Purchasing Manager` for the *Title*.
6. **Type** a *Description* for the new Role.
7. **Click** *Save*.

Details


Define Permissions

Type

Site


Title \*

Purchasing Manager

en-US

Description

Manager in charge of overseeing all purchases for an account.

en-US

Key ?

Purchasing Manager

Save

Cancel

## Add the View Permission for Open Carts

1. Click the *Define Permissions* tab.
2. Open the *Site Administration* drop-down.
3. Open the *Applications* drop-down.
4. Click the *Open Carts* option.
5. Check *View* under *Application Permissions*.

## Open Carts

### APPLICATION PERMISSIONS ?

<input type="checkbox"/>	Action
<input type="checkbox"/>	Add to Page
<input type="checkbox"/>	Configuration
<input type="checkbox"/>	Permissions
<input type="checkbox"/>	Preferences
<input checked="" type="checkbox"/>	View

## Add the Approve Open Orders, Checkout Open Orders and Delete Orders Permissions for Open Carts

1. Check *Approve Open Orders* under *Resource Permissions*.
2. Check *Check Out Open Orders* under *Resource Permissions*.
3. Check *Delete Orders* under *Resource Permissions*.
4. Click *Save*.

#### RESOURCE PERMISSIONS ?

MODEL.RESOURCE.COM.LIFERAY.COMMERCE.ORDER

<input type="checkbox"/>	Action
<input type="checkbox"/>	Add Order
<input checked="" type="checkbox"/>	Approve Open Orders
<input checked="" type="checkbox"/>	Check Out Open Orders
<input checked="" type="checkbox"/>	Delete Orders
<input type="checkbox"/>	Manage Order Notes
<input type="checkbox"/>	Manage Order Restricted Notes
<input type="checkbox"/>	Manage Orders
<input type="checkbox"/>	Permissions
<input type="checkbox"/>	View Open Orders

#### Add the View Permission for Orders

1. Click the *Orders* option (on the left of the screen under *Applications*).
2. Check *View* under *Application Permissions*.
3. Click *Save*.

*Note: The Approve Open Orders, Checkout Open Orders and Delete Orders permissions should automatically be checked when you select the Orders option.*

Details

Define Permissions

Search

Summary

Site Administration ▶

Summary

Permissions

Open Carts: View	Remove
Open Carts > model.resource.com.liferay.commerce.order: Approve Open Orders	Remove
Open Carts > model.resource.com.liferay.commerce.order: Check Out Open Orders	Remove
Open Carts > model.resource.com.liferay.commerce.order: Delete Orders	Remove
Orders: View	Remove

## Assign the Purchasing Manager Role to Dwayne Mills

1. Go to *Control Panel > Users > Users and Organizations*.
2. Click the *Options* button (three dots) next to *Dwayne Mills*.
3. Choose *Edit* from the pop-up.
4. Click *Roles* on the left side of the screen.
5. Click *Select* next to *Site Roles*.
6. Click *Choose* next to *Purchasing Manager*.
7. Click *Save*.

## Roles

### REGULAR ROLES

Select

This user is not assigned any regular roles.

### ORGANIZATION ROLES

This user does not belong to an organization to which an organization role can be assigned.

### SITE ROLES

Select

Title	Site	
Purchasing Manager	Minium Automotive	⊗

Save

Cancel

### Bonus Exercises:

1. Assign Gloria Davis of Minium the role of Sales Agent for Connolly Repairs. (Hint: An Account must first be part of an organization before a Sales Agent can be assigned).
2. Create a new Role called Product Specialist that enables the User to add new products, add and update product information, and view all products. Assign this Role to a new user, Chris Robbins.

## Managing Accounts Module Quiz

1. Which of the following is an example of a default, seller-side account role? (Choose three.)
  - A. Buyer
  - B. Administrator
  - C. Sales Agent
  - D. Order Manager
  - E. Account Administrator
2. Which of the following is not true about accounts in Liferay Commerce?
  - A. They store information about customers.
  - B. They can be managed without platform-level administrative permissions.
  - C. They determine the displayed currency in the digital store.
  - D. They can be organized into Account Groups to created targeted marketing campaigns.
3. Users must be associated with a business account to view products on a B2B site.
  - A. True
  - B. False
4. Account roles are most useful for creating which of the following? (Choose the best available option.)
  - A. Purchasing workflows
  - B. New product entries
  - C. Streamlined checkout processes
  - D. Discounts and promotions
5. A maximum of six users may be associated with any one business account.
  - A. True
  - B. False



## Answer Key

1. A, D, and E
2. C
3. False
4. A
5. False