# Pre-Deployment Activity :

## Add the following items in Custom settings cc\_JCI\_Integration\_Settings\_\_c

* 1. Navigate to Setup🡪Create🡪Custom Settings
  2. Click on cc\_JCI\_Integration\_Settings\_\_c link and click Manage
  3. Click New and add following values for corresponding fields.
     1. Name: RKStore\_ERP\_PDP\_Contact
     2. Field Information: Contact customer service for availability 1-800-624-3914
  4. Click Save.

# List of Components need to be migrated :

## Apex Classes

|  |  |
| --- | --- |
| Component Name | Comments |
| cc\_jci\_ctrl\_CartInclude | For setting up new storefront |
| cc\_jci\_ctrl\_Guest\_StorefrontSelection | For guest user storefront setup |
| cc\_jci\_ctrl\_MiniCartInclude | For Switch store,logo at homepage, etc. |
| cc\_jci\_ctrl\_OrderDetailRD | Order Confirmation: Last 4 digits of the creditcard |
| cc\_jci\_ctrl\_ProductDetailsInclude | For getting contact details information added for RK Store. |
| cc\_jci\_ctrl\_ShippingOptions | Added ERP Name when getting Shipping amount |
| cc\_jci\_ctrl\_SSOPunchin | Added Fax and Tax Id for Create Customer Interface. This is triggered when the registered user login for first time and bill to is created. |
| cc\_jci\_ctrl\_StorefrontSelection | Added new storefront details to be displayed on storefront selection page. |
| cc\_jci\_ctrl\_TaxCalculation | Added ERP Name when getting Tax amount |
| cc\_jci\_ctrl\_ValidateAddress | For showing error message for “No PO Box” |
| cc\_jci\_ctrl\_XiInterceptFrame | RK Store MID value for Creditcard and also sending authorization code instead of last 4 of creditcard |
| DD\_HomeController | Included to redirect to guest user storefront for usertype guest |
|  |  |

## Custom Field

|  |  |  |
| --- | --- | --- |
| Component Name | Object | Comments |
| Allow\_Guest\_User\_Access\_\_c | CC\_Storefront\_ERP\_\_c | Created to display Guest user allowed storefronts. This field regulates if a storefront has guest access. |
| ccrz\_\_Storefront\_\_c | ccrz\_\_E\_Product\_\_c | Added RKStore value to multi picklist |
| ccrz\_\_Storefront\_\_c | ccrz\_\_E\_PriceList\_\_c | Added RKStore value to multi picklist |
| Storefront\_\_c | ERP\_Product\_Catg\_Xref\_\_c | Added RKStore value to multi picklist |
| ERP\_Name\_\_c | Bill\_To\_\_c | Added MACPAC-R12 value to multi picklist |
| Sourcing\_ERP\_Name\_\_c | CC\_ERP\_Number\_\_c | Added MACPAC-R12 value to multi picklist |

## Custom Label

|  |  |
| --- | --- |
| Component Name | Value (To be added as part of manual steps) |
| ON\_LStoreEmail | 1. Navigate to Setup🡪Create🡪Custom Labels 2. Create custom label using details below   **Short Description**: ON\_LStoreEmail  **Name**: ON\_LStoreEmail  **Value**: sales@reliablelouvers.com  **Language**: English |
| No\_PO\_Boxes | 1. Navigate to Setup🡪Create🡪Custom Labels 2. Create custom label using details below   **Short Description**: No PO Boxes  **Name**: No\_PO\_Boxes  **Value**: \*\*\*Shipping is available to physical addresses only (no PO Boxes) in the continental US.  **Language**: English |
| cc\_jci\_RKStoreAvailable | 1. Navigate to Setup🡪Create🡪Custom Labels 2. Create custom label using details below   **Short Description**: RK Store Product available message  **Name**: cc\_jci\_RKStoreAvailable  **Value**: 1-2 weeks from Date of Order  **Language**: English |
| cc\_jci\_Louver\_Estimated\_Ship\_Text | 1. Navigate to Setup🡪Create🡪Custom Labels 2. Create custom label using details below   **Short Description**: cc jci Louver Estimated Ship Text  **Name**: cc\_jci\_Louver\_Estimated\_Ship\_Text  **Value**: 1-2 weeks from Date of Order  **Language**: English |
| cc\_jci\_GuestUser\_Storefront | 1. Navigate to Setup🡪Create🡪Custom Labels 2. Create custom label using details below   **Short Description**: cc\_jci\_GuestUser\_Storefront  **Name**: cc\_jci\_GuestUser\_Storefront  **Value**: Please select the storefront.  **Language**: English |

## Custom Settings

|  |  |
| --- | --- |
| Component Name | Value (To be added as part of manual steps) |
| cc\_JCI\_Integration\_Settings\_\_c | Create a new record in the custom setting. This is a pre deployment step. |
|  |  |

## Email Template

|  |  |  |
| --- | --- | --- |
| Component Name | | Comments |
| ccrz\_\_Ecommerce/CC\_Order\_Acknowledgment\_Chiller | Update International Number | |
| ccrz\_\_Ecommerce/CC\_Order\_Acknowledgment\_IR | Update International Number | |
| ccrz\_\_Ecommerce/Order\_submission\_Error\_Chiller\_Store | Update International Number | |
| ccrz\_\_Ecommerce/Order\_submission\_Error\_IR | Update International Number | |
| unfiled$public/ Abandoned\_Cart\_Email | Abandon Email cart template | |

## Workflow Rules

|  |  |  |
| --- | --- | --- |
| Component Name | | Comments |
| cc\_jci\_Abandoned\_Cart\_Email | Workflow Action asscociated with workflow rule:  **Email Alert: Abandoned Email Alert** | |
|  |  | |

## Visual Force Pages

|  |  |  |
| --- | --- | --- |
| Component Name | | Comments |
| cc\_jci\_Guest\_StorefrontSelection | For guest user storefront setup | |
| cc\_jci\_StorefrontSelection | For setting up new storefront | |

## Visual Force Components

|  |  |  |
| --- | --- | --- |
| Component Name | | Comments |
| cc\_jci\_CartInclude | For SaveAsQuote functionality and updating message | |
| cc\_jci\_CheckoutReviewInclude | Update Shipping Text on Order review page | |
| cc\_jci\_CheckoutReviewTotalSection | Update Actual shipping text on order review page | |
| cc\_jci\_CheckoutShippingInfoInclude | Shipping Options page: Readonly Ship complete and Esitmated ship date | |
| cc\_jci\_CheckoutUserInfoInclude | For showing error message for “No PO Box” | |
| cc\_jci\_FooterInclude | Update terms of sale and email | |
| cc\_jci\_HeaderInclude | Switch store functionality | |
| cc\_jci\_MenuInclude | Update Store header logo for RK Store | |
| cc\_jci\_MyAccountContactInfoInclude | Text above the Contact information | |
| cc\_jci\_MyAccountOrderRD | Commented Zebra date picker | |
| cc\_jci\_OrderDetailRD | Dynamic Phone number and Actual shipping text | |
| cc\_jci\_ProductDetailsInclude | Availability text message for RK Store | |
| cc\_jci\_ProductListInclude | Adding product image | |
|  |  | |

## Page Layout

|  |  |  |
| --- | --- | --- |
| Component Name | | Comments |
| CC\_Storefront\_ERP\_\_c-CC Storefront ERP Layout | Added Allow Guest User Access field on to the pagelayout | |
| ccrz\_\_E\_Spec\_\_c-ccrz\_\_CC Spec Layout | Added new fields to pagelayout, so it will be of help when creating new Product filters | |
| ERP\_Product\_Catg\_Xref\_\_c-ERP Product Catg Xref Layout | Added new fields to pagelayout, so it will be of help when creating new default product catg xref record for the first time | |

## Static Resources

|  |  |
| --- | --- |
| Component Name | Comments |
| cc\_jci\_OrdNavLouvers\_Theme | Logo for Reliable Architectural Products Store |

## Test Classes

|  |  |
| --- | --- |
| Component Name | Code Coverage |
| cc\_jci\_ctrl\_CartIncludeTest | Covered 85 percent |
| cc\_jci\_ctrl\_Guest\_StorefrontSelTest | Covered 96 percent |
| cc\_jci\_ctrl\_MiniCartIncludeTest | Covered 85 percent |
| cc\_jci\_ctrl\_ProductDetailsIncludeTest | Covered 87 percent |
| cc\_jci\_ctrl\_SSOPunchinTest | Covered 80 percent |
| cc\_jci\_ctrl\_StorefrontSelectionTest | Covered 84 percent |
| DD\_HomeControllerTest | Covered 90 percent |
| cc\_jci\_ctrl\_ValidateAddressTest | Covered 90 percent (No Changes) |

# Post –Deployment Changes :

|  |  |  |  |
| --- | --- | --- | --- |
| S.No | Action | Steps | Screenshots |
|  | Take Backup | 1. Select CC Admin🡪Settings Loader   Download all items in downloads section |  |
|  | Upgrade Cloudcraze Settings | 1. Select CC Admin🡪Dataloader 2. Click Upgrade button underCloudcraze settings   Once done Upgrade button will be disabled. |  |
|  | Migrate Page Setting Data | 1. Select CC Admin🡪Dataloader 2. Click Migrate under Migrate Page Settings   **Note: Click only once** |  |
|  | Verify Settings | 1. Select CC Admin🡪Configuration Settings 2. Verify settings with SIT 3. Click on Storefronts 4. Click View on CHStore 5. Click on Configuration Settings 6. Verify settings with SIT 7. Click View on IRStore 8. Click on Configuration Settings   Verify settings with SIT |  |
|  | Update Stylesheet settings | 1. Select CCAdmin🡪Storefront🡪Click view on CHStore🡪Configuration Settings 2. Select Stylesheet in Module dropdown 3. Delete existing configuration settings under style sheet. (There should be only 6 items) 4. Click New and add the following items from [Appendix B](#_Appendix-B:) below in the same order. |  |
|  | Update Stylesheet settings | 1. Select CCAdmin🡪Storefront🡪Click view on IRStore🡪Configuration Settings 2. Select Stylesheet in Module dropdown 3. Delete existing configuration settings under style sheet. (There should be only 6 items) 4. Click New and add the following items from [Appendix C](#_Appendix-C_(Configurations_for) below in the same order. |  |
|  | Building Configuration Cache | 1. Select CCAdmin🡪Configuration Cache Management 2. Click **Build New** button 3. Click Refresh List to see new created configuration 4. Click Deactivate if any old configurations exist   Click Activate on Newly created Configuration |  |
|  | Active Sobject Configuration | 1. Select CC Admin🡪Settings 2. Select Enable Sobject Config Settings checkbox   Click Save |  |
|  | Clone CHStore storefront | * Click on CC Admin tab * Click on Storefronts * Click Clone button which is associated with “CHStore” * Enter “RKStore” and click clone store. |  |
|  | Change Theme for RK store | * Click View on RKStore * Click on Themes * Click Enable for cc\_jci\_OrdNavLouvers\_Theme |  |
|  | Update Feature Filter Sorting | * Click CC Admin tab🡪Storefronts🡪RKStore(View)🡪Configuration Settings * Select Module=Feature Filtering * Select Override for Configuration=SortValues and update the value to TRUE |  |
|  | Create a new CC Storefront ERP record | * Click CC Storefront ERP tab * Click New and enter the following details on Edit page and hit save:  |  |  | | --- | --- | | Field Name | Field Value | | CC Storefront ERP Name | Reliable Architectural Products | | ERP Id | 100111606 | | ERP Name | MACPAC-R12 | | Storefront Name | RKStore | | Allow Guest User Access | True | |  |
|  | Edit **LAWSON** CC Storefront ERP object to update allow guest user access | * Click CC Storefront ERP tab * Click Edit for **LAWSON** record. * Change the Field: Allow Guest User Access to true. |  |
|  | Create new CC Categories record for RKStore | * Click on CC Categories tab * Click New and enter the following details and click save:  |  |  | | --- | --- | | Field Name | Field Value | | Category Name | RK Root | | Category ID | 1997 | | End Date | 12/31/2099 | | Sequence | 500 | | Start Date | Today’s Date | | Parent Category | Search for **Products** category. | |  |
|  | Create new CC Categories record as a child for RK Root | * Click on CC Categories tab * Click New and enter the following details and click save:  |  |  | | --- | --- | | Field Name | Field Value | | Category Name | Architectural Louvers | | Category ID | 30001 | | End Date | 12/31/2099 | | Sequence | 500 | | Start Date | Today’s Date | | Parent Category | Search for **RK Root** category. | |  |
|  | Add RK Root category to RKStore | * Click on CC Admin Tab * Click on Storefronts * Click View on RKStore * Change Root Category Id field to 1997 and click Save. |  |
|  | Create new Default ERP Product Catg XREF record for RKStore | * Click on **+**  for additional tabs. * Click on ERP Product Catg XREF * Click New and enter the following details and click save.  |  |  | | --- | --- | | Field Name | Field Value | | CC Category | Search for **Architechtural Louvers** category | | ERP Product Category | Architechtural Louvers | | Default | TRUE | | Storefront | RKStore | |  |
|  | Add new CC Price Lists record for RKStore | * Click on CC Price Lists Tab * Click New and enter the following details and click save:  |  |  | | --- | --- | | Field Name | Field Value | | Name | Reliable Louvers | | Start Date | Today’s Date | | End Date | 12/31/2099 | | Storefront | RKStore | | Currency ISO Code | USD | | Desc | Reliable Louvers Store Pricelist | | Enabled | True | | Pricelist Id | 2002 | |  |
|  | Change Anonymous Account to Navigator Record Type. | * Search for CCAnonymous Account * Click on CCAnonymous Account. * Account Record Type field: Click Change and select Navigator and hit save * Change the following fields and click save  |  |  | | --- | --- | | Field Name | Field Value | | Account Group | Search **Anonymous** Account Group | | Billing Country | United States | | Billing Street | 507 E Michingan St | | Billing City | Milwaukee | | Billing State/Province | WI | | Billing Zip/Postal Code | 53202 | | Portal Account | True | | Active | True | |  |
|  | Create New Bill To record for CCAnonymous Account for RKStore | * Search for CCAnonymous and click on the appropriate account * Go to the related lists and click New on Bill Tos related list of type Navigator  |  |  | | --- | --- | | Field Name | Field Value | | Bill To Name | JCI RK - Guest User Pricing | | AR Number | MACPAC-R12-100447 | | ERP Account Id | 100447 | | Active | True | | Street Address | 507 E Michigan St | | ERP\_Name | MACPAC-R12 | | City | Milwaukee | | State | WI | | Postal Code | 53202 | | Country | USA | | Account | Search for **CCAnonymous** Account | |  |
|  | Create new CC Spec records | * Use the values from [Appendix A](#_Appendix-A_(ccrz__Spec__c)) |  |
|  | Add new CC Account Group Price List record for RKStore.  We have to Create one each for Portal Account and Anonymous Account Groups. | * Click on CC Price Lists Tab * Click on Reliable Louvers record * Click New CC Account Group Price List button on the Related List and enter the following details and click save:   For Portal Account   |  |  | | --- | --- | | Field Name | Field Value | | Start Date | Today’s Date | | End Date | 12/31/2099 | | Sequence | 500 | | Account Group | Portal Account | | Enable | True | | Pricelist | Reliable Louvers |   For Anonymous Account   |  |  | | --- | --- | | Field Name | Field Value | | Start Date | Today’s Date | | End Date | 12/31/2099 | | Sequence | 500 | | Account Group | Portal Account | | Enable | True | | Pricelist | Reliable Louvers | | For PortalAccount Account Group:    For Anonymous Account Group: |
|  | Enable Guest User access to Guest storefront page and controller | * SetUp🡪Communities🡪All Communities🡪Order Navigator(Manage) * Administration🡪Pages🡪Go to Force.com🡪Site Visualforce Pages (Edit) * Add cc\_jci\_Guest\_StorefrontSelection to Enabled Visualforce Pages and save. |  |
|  | Add Feature Filtering sorting for RKStore |  |  |
|  | DD\_Sitekey recaptcha | * Update custom label |  |
|  | Disable charge to Account for Louvers store | * Click on CC Admin Tab * Click on Storefronts * Click View on RKStore * Click on Configuration Settings. * Delete the record with Module=pmt\_cpo, configuration=pay |  |
|  |  |  |  |

# Appendix-A (ccrz\_\_Spec\_\_c)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **ccrz\_\_Desc\_\_c** | Model | Equivalent OEM | Product Color | Dimensions | Blade Type |
| **ccrz\_\_DisplayName\_\_c** | Model | Equivalent OEM | Product Color | Dimensions | Blade Type |
| **ccrz\_\_FilterType\_\_c** | Checkbox | Checkbox | Checkbox | Checkbox | Checkbox |
| **ccrz\_\_IsVisibleInCatalog\_\_c** | TRUE | TRUE | TRUE | TRUE | TRUE |
| **ccrz\_\_Locale\_\_c** | en\_US | en\_US | en\_US | en\_US | en\_US |
| **ccrz\_\_SelectType\_\_c** | Multiple | Multiple | Multiple | Multiple | Multiple |
| **ccrz\_\_Sequence\_\_c** | 1 | 2 | 3 | 4 | 5 |
| **ccrz\_\_SpecGroup\_\_c** | Processor | Processor | Processor | Processor | Processor |
| **ccrz\_\_UseForFilter\_\_c** | TRUE | TRUE | TRUE | TRUE | TRUE |
| **CurrencyIsoCode** | USD | USD | USD | USD | USD |
| **Name** | Model | Equivalent OEM | Product Color | Dimensions | Blade Type |

# Appendix-B (Configurations for CH Store):

| MODULE | CONFIGURATION | STOREFRONT | PAGE | VALUE |  |
| --- | --- | --- | --- | --- | --- |
| Style Sheet | CSS Include 0 | CHStore | [all](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/jquery-ui-theme/jquery-ui-custom.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |
| Style Sheet | CSS Include 0 | CHStore | [product details](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/style-simpletooltip-min.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |
| Style Sheet | CSS Include 1 | CHStore | [all](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/bootstrap.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |
| Style Sheet | CSS Include 2 | CHStore | [all](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/styles.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |
| Style Sheet | CSS Include 2 | CHStore | [Home](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/js-image-slider.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |
| Style Sheet | CSS Include 3 | CHStore | [all](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/bootstrap\_overwrite.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |
| Style Sheet | CSS Include 4 | CHStore | [all](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/fonts.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |

# Appendix-C (Configurations for IR Store):

| MODULE | CONFIGURATION | STOREFRONT | PAGE | VALUE |  |
| --- | --- | --- | --- | --- | --- |
| Style Sheet | CSS Include 0 | IRStore | [all](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/jquery-ui-theme/jquery-ui-custom.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |
| Style Sheet | CSS Include 0 | IRStore | [product details](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/style-simpletooltip-min.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |
| Style Sheet | CSS Include 1 | IRStore | [all](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/bootstrap.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |
| Style Sheet | CSS Include 2 | IRStore | [all](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/styles.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |
| Style Sheet | CSS Include 2 | IRStore | [Home](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/js-image-slider.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |
| Style Sheet | CSS Include 3 | IRStore | [all](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/bootstrap\_overwrite.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |
| Style Sheet | CSS Include 4 | IRStore | [all](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) | [css/fonts.css](https://jcibe--sit--ccrz.cs50.visual.force.com/apex/cc_admin_Admin?t=General&s=CHStore) |