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Introduction

There is so much to explore when you implement a webstore with Sana Commerce. This section provides few basic ideas to help you figure out where to start with your Sana Commerce solution.

Your new Sana Commerce 9.3 - It's waiting to be discovered!	
Get started with Sana Admin 9.3	First use guide
Finding your way around	Master data management

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Get Started

After Sana Commerce is installed Sana Admin will open in the default web browser. You will be asked to create the first Sana Admin user. This user will have the **System administrator** role. System administrator has full access to Sana Admin. Log in with the newly created user.

When any user logs in Sana Admin for the first time, a user should read End User License Agreement (EULA). If the License Agreement is accepted a user will enter Sana Admin.

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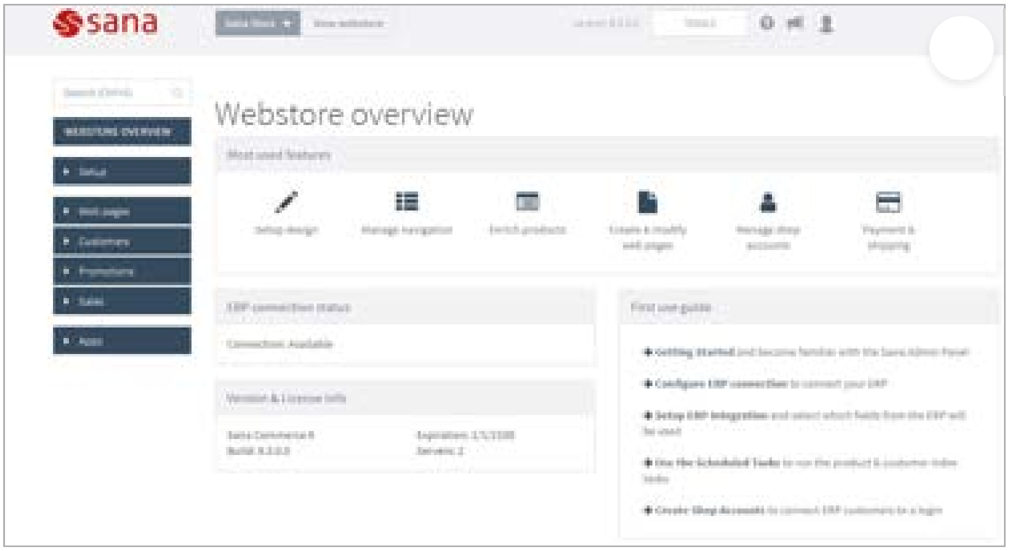
Finding Your Way Around

Webstore overview is the starting point for everything you do with your Sana Commerce webstore. This is the home page of the Sana Commerce administration panel that is called **Sana Admin**.



On the **Webstore overview** page you can see the most used features, ERP connection status, Sana Commerce version and license information and first use guide that contains some helpful hints on what should be configured first. These are just few steps that should be done right after Sana Commerce has been installed. You can click on any point and it will bring you to the related article on the Sana online help where you can read the detailed information.

Navigation

Sana Admin has 6 main navigation items each holding different features:

- **Setup** - All webstore settings are kept under the "Setup" navigation item. Here you can enter information about your webstore, change your webstore design, create webstore navigation, and manage products, customers, ordering and marketing settings. If you are using the Sana Mobile application it can be configured and managed under 'Setup' as well.
  For more detailed information about all settings under the 'Setup' navigation item, see "Setup".
- **Web pages** - Sana Commerce comes with several content and product page templates. Here you can manage product descriptions, create product list pages and flexi-pages, FAQ page and news items. Different content elements can be used to create diverse and fancy pages with various layouts.
  For more detailed information about each page type, see "Web Pages".
- **Customers** - Customer specific features are located here. Under the 'Customers' navigation item you can manage shop accounts of your webstore, process ratings & reviews of the products catalog and view newsletter subscriptions.
  For more detailed information about customer specific features, see "Customers".

- **Promotions** - Sana Commerce has built-in coupons functionality. Here you can create discount codes that give a discount on the total order amount of the shopping cart.
  For more information about discount codes and checkout offers, see "Promotions".
- **Sales** - Sana Commerce allows to accept orders even when there is no connection to your ERP system. This allows to continue business operations without interruption, even when connection to your ERP system is not available for some reasons. Under the 'Sales' navigation item you can view and process the sales orders that are placed in the maintenance mode.
  For more information, see "Unprocessed Orders".
- **Tools** - Sana Commerce provides different built-in tools that can help in managing your Sana webstore. Sana Admin users with different roles can find useful tools for system administration, webstore management and development.
  For more information, see "Tools".

No matter where you are in Sana Admin, you can use the **Search** box to find whatever you are looking for. Just start typing and you will see some hints which page you need to go to.

From the top bar you can open your webstore by clicking **View webstore**. If you have a multi-store solution you can switch between different webstores. To the right and to the left of the "Tools" navigation item you can see the Sana version, link to the Sana online help and information about the logged in user.

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First Use Guide

When Sana Commerce is installed and the first user with the System administrator role is created, you should make some first steps that allow you or other Sana Admin users proceed to managing the Sana webstore.

In Sana Admin users with different roles can be created. The assigned role determines the user's function and permissions within the system. Only a user with the System administrator role can create the Sana Admin users and assign roles. For more information, see "User Management".

Configure ERP connection

NOTE

Available to System administrator only.

In Sana Admin click: **Tools** > **ERP connection**.

Configure ERP connection to connect Sana to your ERP system. Click **Test connection** to check whether the connection to your ERP system is available.
For more information, see "ERP Connection".

Setup ERP integration

NOTE

Available to System administrator and Product content manager.

In Sana Admin click: **Setup** > **ERP integration** > **Index fields**.

Select which fields from the ERP system should be used. By adding the fields to the index you determine which data from your ERP system will be used and shown in your webstore. Index fields are also used to create product sets and configure webstore search settings.
For more information, see "ERP Integration".

Use the Scheduled Tasks

NOTE

Available to System administrator, Product content manager and Marketer.

In Sana Admin click: **Tools** > **Scheduled tasks**. At first run the **General information import** task and then run the **Product import** and **Customer import** tasks.

The **General information import** task is used to synchronize settings and basic data with your ERP system. When you run this task, it checks whether your ERP system supports for example product images, sales statistics or prepayments. It also imports the basic data from your ERP system to the Sana database, for example countries, currencies, units of measure, shipping methods. This task is also needed to be able to run the Sana web store in the maintenance mode when connection to ERP is not available. Thus, when the Sana Commerce solution is installed, it is important to run this task before running the **Product import** and **Customer import** tasks.

The **Product import** task is used to retrieve the product information from the database to build or update the webstore index. The webstore search functionality, sorting, phonetic search and product sets configuration depends on what product information is indexed.

The **Customer import** task is used to retrieve the list of all customers/contacts/sales agents from your ERP system. When the list of customers is indexed, they become available for managing the shop accounts in Sana Admin.

For more information, see "Scheduled Tasks".

Create Shop Accounts

NOTE

Available to System administrator and Shop account creator.

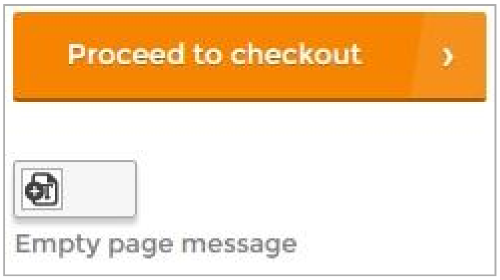
In Sana Admin click: **Customers** > **Shop accounts**.

Create shop accounts to connect customers from your ERP system to their logins.
For more information, see "Shop Accounts".

Change demo content in the shopping basket

In the shopping basket and on each step of the checkout process there is some demo content about payments and shipping.

Open the **In-site editor** and change the demo content to the one that fits your needs. When you open the In-site editor, you will not see this text, instead you will see the text **Empty page message**. Hover over this text and click **Create page message**.



Now you can change the demo content. Make sure that you changed the demo content in the shopping basket and on all checkout steps.

If you open the In-site editor and navigate to the shopping basket, you can also see the text **Empty page message** in the header and in the footer of the shopping basket if you are logged in as a B2C customer. If you are logged in as a B2B customer, the text **Empty page message** is present only in the footer of the shopping basket. These are the placeholders where you can also add some content using the In-site editor.

For more information about how to use the In-site editor, see "In-site Editor".

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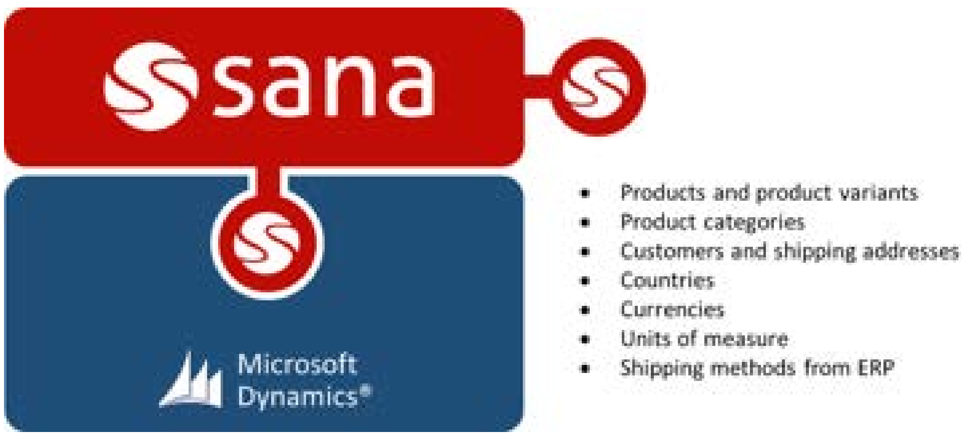
Master Data Management

Web store performance is extremely important for your business. A slow web store means fewer customers and less happy customers and thus lost revenue. Different factors can have influence on web store performance, like size and complexity of the catalog, number of visitors per day, number of simultaneous orders, search queries, hardware, and it is not so easy to make a precise estimation of what should be taken into account when we are thinking about performance. What about large businesses that have thousands or even tens of thousands of products and customers in their ERP system, and thus need to handle high traffic volume? That's why we are constantly improving performance of our web store.



As Sana Commerce is the ERP integrated e-commerce solution it uses a single source of data - your ERP system. So, all products, customers and orders data is stored and managed in the ERP system. Once products catalog and customers' data is ready a significant part of it will not be changed for a long period. The data which does not tend to change frequently is now available in the Sana Commerce SQL database, improving access speed and availability of this data. If some data changes frequently, Sana takes care of instant updates, so customers won't notice the difference. This excludes the necessity of a big amount of requests to the ERP system.

The following data might not change frequently and is now stored in the Sana's database:

- Products and product variants
- Product categories
- Customers and their shipping addresses
- Countries
- Currencies
- Units of measure
- Shipping methods from ERP

Though, this data is now stored in the Sana Commerce SQL database it can be still easily updated if needed. By updating the product or customer index, manually or automatically according to a schedule, any changes made to the above mentioned data in your ERP system will immediately become visible on your web store.

The key point is that the core data which may frequently change, like product prices, stock, and orders, is still coming directly and in real-time from the ERP system.

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Reset Sana Admin Password

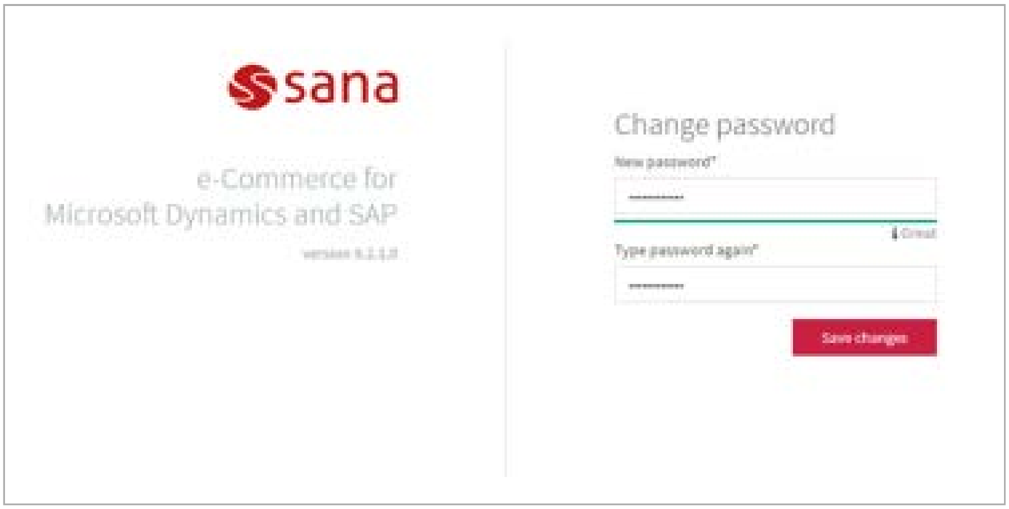
If you are a Sana Admin user and you have forgotten your login password, you can reset it on your own, by entering the valid e-mail address associated with your account.

Reset the Sana Admin password

Step 1: On the Sana Admin login page, click **Forgot password**.

Step 2: Enter the valid e-mail address associated with your account and click **Reset password**. You will receive the e-mail to the address you have entered with a password reset link.

Step 3: Click on the link in the e-mail or copy and paste it to your web browser address bar. You will be redirected to the **Change password** page where you can create a new password.



NOTE

The password reset link is valid for 24 hours and can be used only once.

Step 4: Click **Save changes** to save your new password. A new password will be applied and you will be automatically logged in to Sana Admin.

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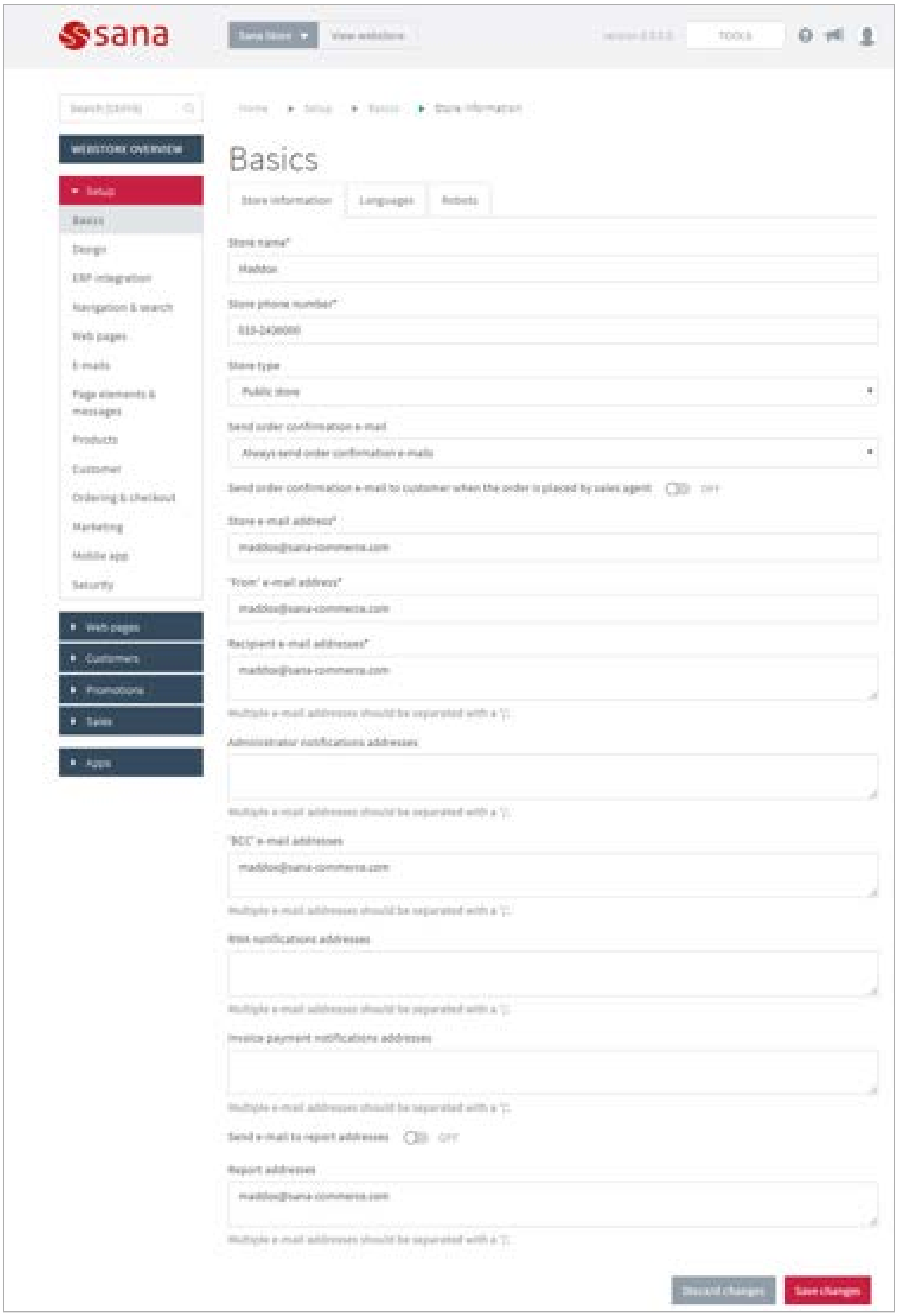
Basics

Basics web store settings can be accessed in **Sana Admin** > **Setup** > **Basics**. These settings control various aspects of your web store.

Store information

YouTube Watch the video



The table below provides description of the basics web store settings.

Field	Description
Store name	Enter the name of your web store. It is shown in the web browser on the tab of the opened web store and in the copyright at the bottom of the page. The store name is also used in the system e-mails. In the system e-mails like "Change password", "Forgot password", "Order confirmation" and "Tell a friend" the variable [SHOPNAME] will be automatically replaced with the name from the **Store name** field. For more information about e-mail templates, see "E-mails".

Store phone number	Enter the phone number of your web store. It is shown at the top of the web store and is used in the system e-mails. In the system e-mails like "Order confirmation" and "Contact us" the variable [SHOPPHONE] will be automatically replaced with the number from the **Store phone number** field. For more information about e-mail templates, see "E-mails".
Store type	Select the type of your web store: • **Private store** - this type of web store is closed and thus is not publicly accessible. This means that a customer cannot see the web store catalog until he or she logs in. In the private store the existing customers from your ERP system are connected to the shop accounts in Sana Admin. Sales agents can place orders on behalf of their customers as well as create prospect customers. For more information about how to create accounts for the customers (contacts or sales agents), see "Shop accounts". • **Public store** - this type of web store is opened and thus is publicly accessible. This means that anonymous web store visitors can see the web store catalog. In the public store you can have the existing customers from your ERP system as well as the customers who can register online in the web store. This type of web store combines all capabilities and features of the private and public store types. Such web store shares the content for both types of customers, those who exist in the ERP system and those who register online in the web store, but you can set up different web store catalogs, prices and stock for different customers.
Send order confirmation e-mail	Enable or disable sending order confirmation e-mails to the customers. For more information, see "Order Confirmation".
Store e-mail address	The e-mail address specified in this field will be shown in the e-mails sent from a Sana web store to the customers as a web store e-mail address. If there is the [SHOPEMAIL] tag in the e-mail template, it will be automatically replaced with the store e-mail address. For more information about e-mail templates, see "E-mails".
'From' e-mail address	All e-mails that are sent from a Sana web store to the customers, like order confirmation, are sent from the e-mail address specified in this field. For more information about e-mail templates, see "E-mails".
Recipient e-mail addresses	This is the e-mail address to which all e-mails from the "Contact us" form of your web store will be sent.
Administrator notifications addresses	Sana allows to place orders even when there is no connection to the ERP system. When the connection between Sana and ERP is lost for some reason, Sana will automatically activate the maintenance mode, and when connection is back, the maintenance mode will be automatically deactivated. In both cases, Sana notifies a system administrator about ERP connection availability by e-mail. You can now use a separate e-mail address to receive e-mails about connection between Sana and your ERP system.

	Starting from **Sana 9.3.3**, a web store administrator of Sana can also receive e-mails to this address informing him or her when the scheduled task has failed. There is a name of the task that failed, the name of the webstore, which is useful in case you have several webstores and the error message in the e-mail. Thanks to this, the web store administrator can quickly respond to problems with data synchronization. To receive the e-mails, a web store administrator should enable the option **Send e-mail to administrator when task has failed** in the scheduled task settings.
'BCC' e-mail addresses	As a web store administrator, you can receive all order confirmation e-mails to this address. If you enter the e-mail address in this field, not only the customers will receive the order confirmation e-mails, but they will be also sent to this e-mail address.
RMA notifications addresses	As a web store administrator, you can receive all return order confirmation e-mails to this address. If you enter the e-mail address in this field, not only the customers will receive the return order confirmation e-mails, but they will be also sent to this e-mail address. For more information, see "Return Orders".
Invoice payment notifications addresses	As a web store administrator, you can receive all invoice payment confirmation e-mails to this address. If you enter the e-mail address in this field, not only the customers will receive the invoice payment confirmation e-mails, but they will be also sent to this e-mail address. For more information, see "Online Invoice Payments".
Report addresses	Use report addresses only on test/beta environment for testing purposes. On live environment this setting should be disabled. This setting is used to send all Sana e-mails, for example order confirmation, to the specified report address instead of the recipients' e-mail addresses. If you enable **Send e-mail to report addresses**, enter the e-mail address in the **Report addresses** text box. In this case real customers will not receive any e-mails from Sana.

Languages

Watch the video

NOTE

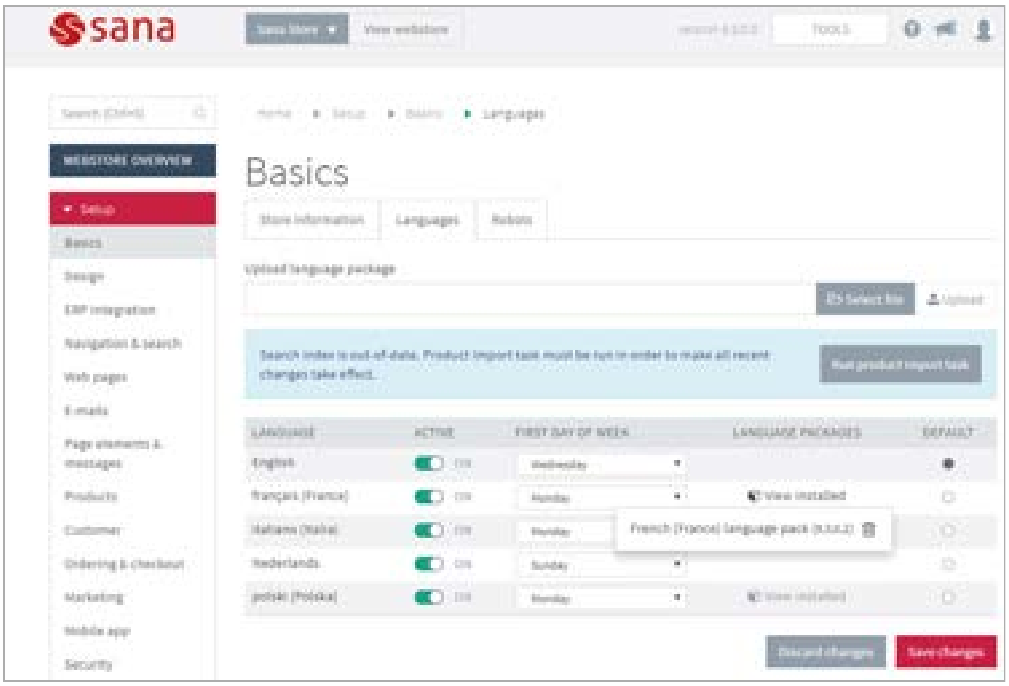
Applies to: Sana Commerce 9.3.0 and 9.3.1.

Starting from **Sana 9.3.2**, you can install, configure, update and remove language packs for a Sana web store and Sana Admin using Sana Apps. For more information, see "Languages".

Sana is a multi-lingual e-commerce solution. You can install the necessary language package into Sana and create your webstore content in any language.

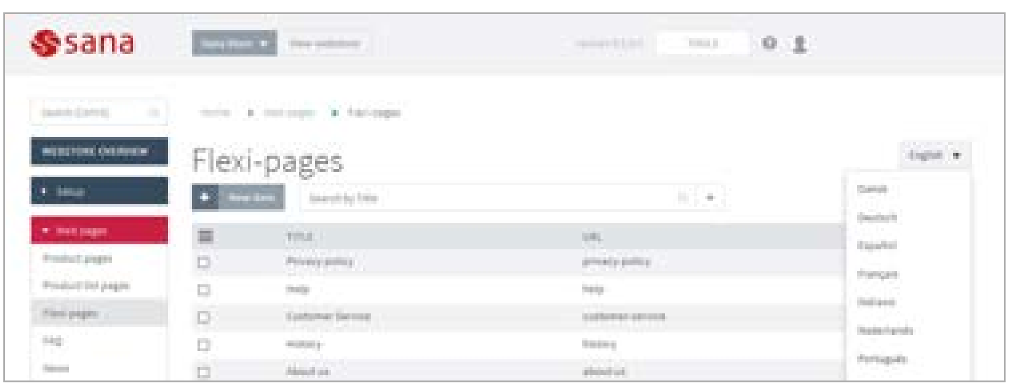
A language package allows to display the webstore interface in the language of your choice and provides flexibility to translate your webstore content to any installed language. It contains the default page elements and messages of the webstore interface and e-mail templates. All language packages are available on the Sana Translation Portal. Only Sana partners registered on Sana Community can download the language packages.

On the **Languages** tab, you can install the language package for your webstore. All you need to do is just to download the language package from the Sana Translation Portal and upload it to Sana Admin.



On the **Languages** tab, you can see all installed languages. You can activate and deactivate any language. When you install Sana, it is available only in the English language. All other languages can be installed using the language packages.

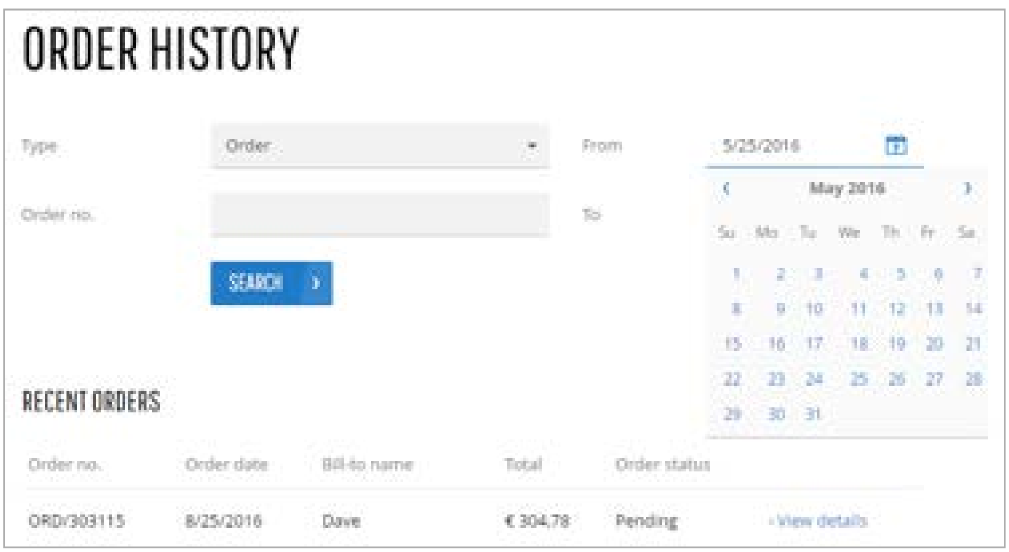
Once the language package is installed, a content manager can start creating the necessary webstore content in the installed language and customers can change the language on a webstore.



If you provide your webstore content in different languages, select the **default** one. When a webstore visitor opens the webstore, its content is shown in the default language. If a customer changes the language, next time when he or she opens the webstore, it will open in the language selected previously. Information about the language selected by the customer is stored in the Web browser cookies. If the customer opens some language-specific URL which was sent to him or her or was saved as a bookmark, the web store will open in the language specified in the URL.

You can also set the first day of the week for the calendar control shown in the Sana webstore per language. According to the International Organization for Standardization (ISO 8601), Monday is the first day of the week. Although, this is the international standard, several countries, including the United States and Canada, consider Sunday as the start of the week.

In the Sana webstore, the calendar control is available on the **Order overview** checkout step, where a customer can define the requested delivery date, and in the order history to filter the orders by date.



When a customer changes the webstore language, the first day of the week will be changed in the calendar as well, depending on the configuration of the language in Sana Admin.

By clicking on the link **View installed**, you can see the version of the installed language package and remove the package.

If there is a new version of the language package on the Sana Translation Portal, you can update your package by re-uploading it in Sana Admin. All your translated content will remain in Sana, only the default texts will be updated with the new version of the language package.

If you delete the language package, the webstore language will not be deleted, but only the default texts provided in the language package. If you have changed some default texts of the language package either using page elements & messages in Sana Admin or the In-site editor, or changed the default e-mail templates, they will remain in Sana and will not be deleted with the language package. All your translated content will not be removed as well.

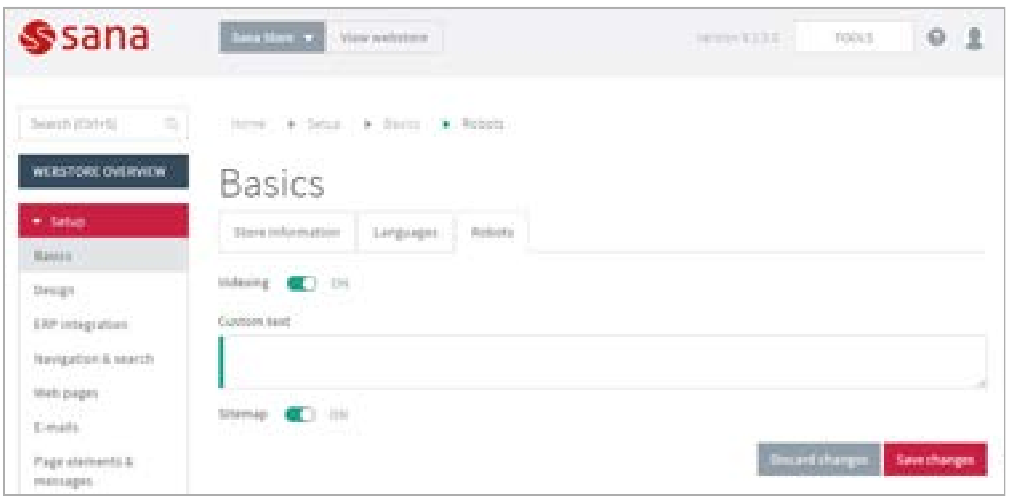
Robots

Watch the video

If you want your web site to be seen in search results of any search engines you need to allow your web site and various web pages to be crawled and indexed by search engine robots.

There are two files which help search engine robots find what they need: **robots.txt** and **sitemap**. These files are located on the Web server.

The contents of the "robots.txt" file can be managed directly from Sana Admin: **Setup** > **Basics** > **Robots**.
Moreover, a separate "robots.txt" file can be generated per web store in case of a multi-store solution.



The table below provides the description of the indexing settings in Sana Admin.

Field	Description
Indexing	Use this option to allow/deny your web store to be indexed and crawled by search engine robots. By default indexing is disabled. Here is the default record in the "robots.txt" file when everything is disabled: **User-agent: *** **Disallow: /** Below you can see the default record in the "robots.txt" file when indexing is enabled: **User-agent: *** **Disallow: /admin** When you enable indexing the default record in the "robots.txt" file states that all search engine robots can crawl all web store URLs except the URLs of Sana Admin.
Custom text	In this field you can add any custom indexing rules.

	Indexing rules added to this field will redefine the default behavior no matter whether indexing is disabled or enabled.
Sitemap	This option allows to add the sitemap URL to the "robots.txt" file. Below you can see the record in the "robots.txt" file when **Indexing** and **Sitemap** are enabled: **User-agent: *** **Disallow: /admin** **Sitemap:** http://sanastore.com/sitemap.xml To be able to add the sitemap URL to the "robots.txt" file at first you should create the sitemap file by running the **Sitemap export** task from Sana Admin: **Tools** > **Scheduled tasks**. For more information about sitemap, see "Sitemap export".

For more information about robots.txt and indexing rules, see "About robots.txt".

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Setup

Design

Watch the video

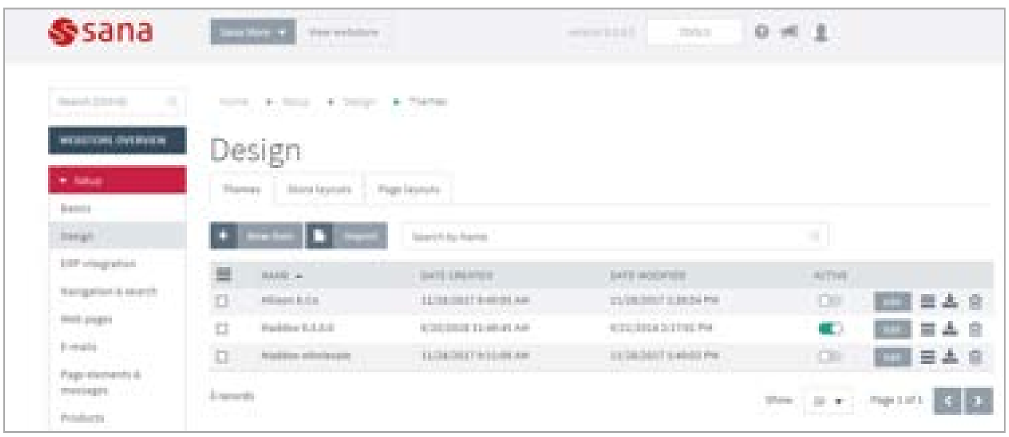
Your webstore design starts with your theme. Themes of the Sana Commerce webstore control all aspects of the webstore appearance.

The theme editor lets you customize your webstore logo, favicon, fonts, color and size of the texts. You can also change the color of the graphical elements in the webstore. Using the theme editor you can determine the overall look and feel of your webstore without any knowledge in HTML or CSS.

To create new themes and to manage your webstore design, in Sana Admin click: **Setup** > **Design**.

Themes

Watch the video



On the **Themes** tab, you can create webstore themes. If you have a multi-store solution the list of themes is shared with all available webstores.

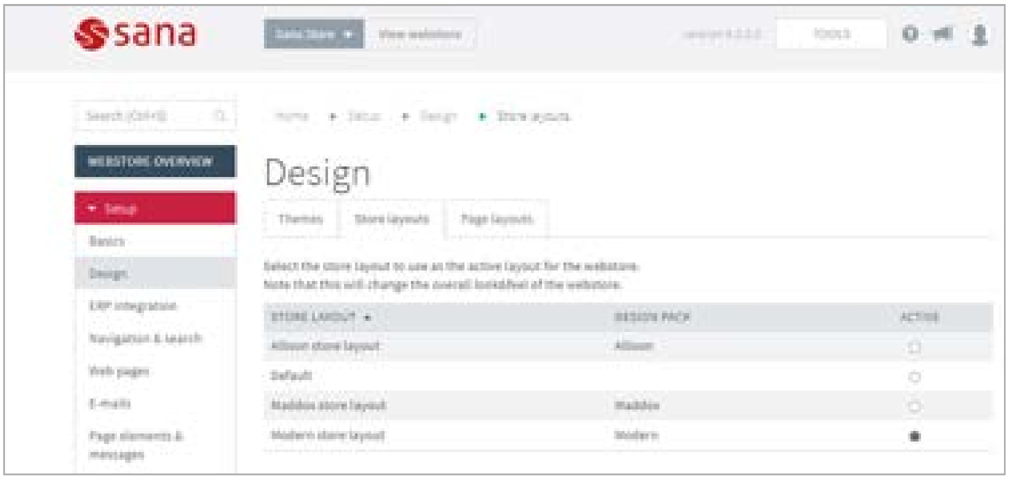
Any of the themes can be applied to your webstore by making it **Active**.

Refer to the Themes section and see the default webstore theme and all its elements that can be managed.

In Sana Admin you can download and import themes. A theme is stored in the XML file. A webstore theme can be added to the design pack, so it will be a part of the custom webstore design. For more information see, "Sana Design Packs".

Store layouts

Watch the video



Sana Commerce contains a powerful page templates and themes system that can be used to completely customize the look and feel of your webstore to meet your needs and to integrate it with an existing webstore design.

In Sana Admin, click: **Setup** > **Design** > **Store layouts**.

On the **Store layouts** tab you see all custom store layouts that are uploaded with the design packs. A store layout is the master layout that is used to change the overall look and feel of the webstore.

Out of the box, Sana Commerce contains only the default store layout.

If a design pack has been installed and it contains the custom store layout it will be available under the **Store layouts** tab. There you can see the store layout name and the design pack that contains it and you can activate the store layout and apply it to your webstore.

For more information, see "Sana Design Packs".

If the custom store layout is applied to your webstore you can still use page layouts and webstore themes to manage the look and feel of your webstore.

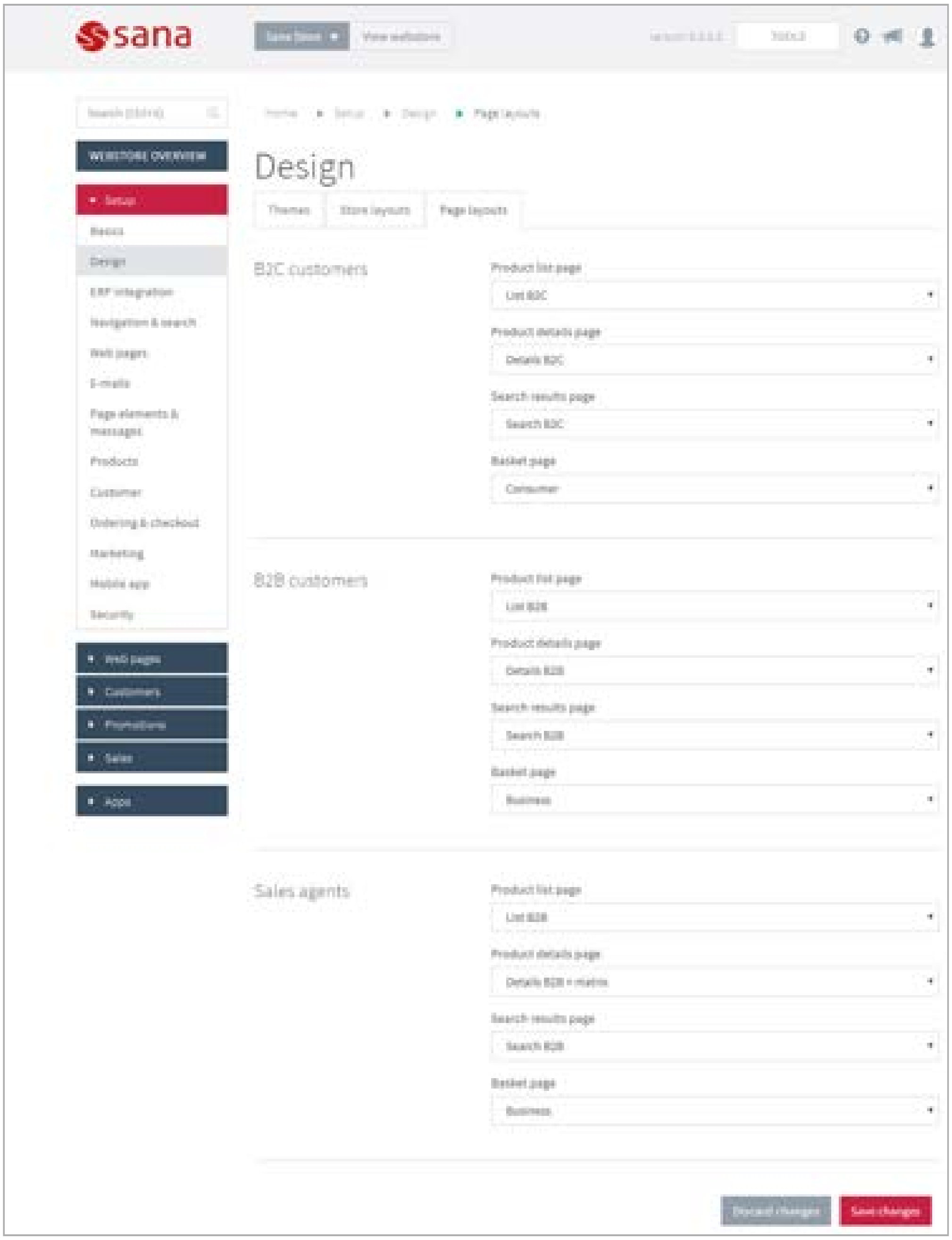
Page Layouts

Watch the video

Sana Commerce comes with several default content and product page templates that have a different layout and features. For more information about product and content pages, see "Web Pages".

Product list page, product details page, search results page and basket page have several page layouts with a predefined set of features that can be changed per customer group.

In Sana Admin, click: **Setup** > **Design** > **Page layouts.**



On the **Page layouts** tab you select page layout for each page type (Product list page, Product details page, Search results page, Basket page) per customer group (B2C customers, B2B customers, Sales agents).

The tables below provide an overview of features that are available/not available in each page layout.

Product list page

Page layout/ Feature	Order list mode	Variants display mode	Units of measure
List B2C	X	X	X
List B2B	✓	Matrix	✓

Product details page

Page layout/ Feature	Variants display mode	Units of measure	Write a review	Tell a friend	Add to wish list

Details B2C	Dropdown	✓	✓	✓	✓
Details B2B	Dropdown	✓	X	X	✓
Details B2B + matrix	Matrix	✓	X	X	X

Search results page

Page layout/ Feature	**Variants display mode**	**Order list mode**	**Units of measure**
Search B2C	X	X	X
Search B2B	Matrix	✓	✓

Basket page

Page layout/ Feature	**Quick order**	**Units of measure**	**Add to wish list**	**Save as template**	**Variants**
Business	✓	✓	✓	✓	Collapsible
Consumer	X	✓	X	X	Each variant as a separate line

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ERP Integration

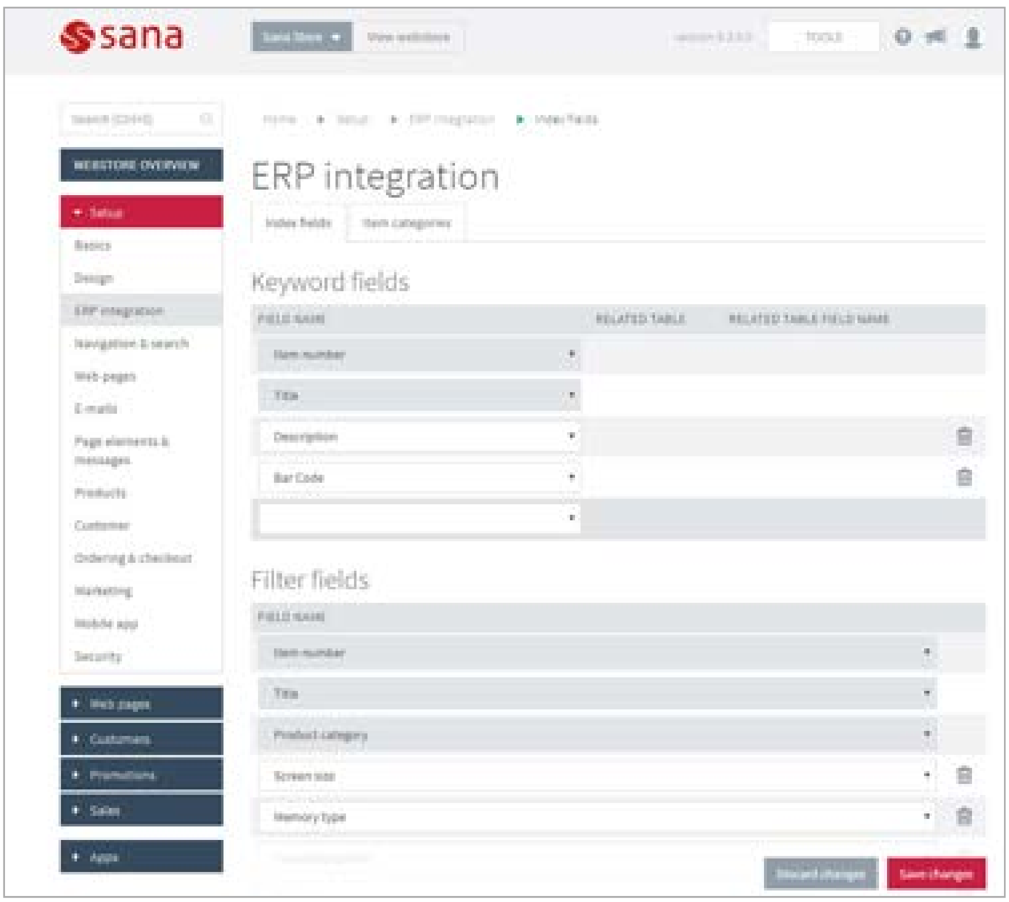
In Sana Admin on the **ERP Integration** menu item you can set up the search index and keyword fields and import the item categories. All this data is retrieved from your ERP system.

Index fields

Watch the video

Sana Commerce search is based on the Lucene search engine. By adding the product fields to the Lucene index you can extend the webstore search functionality.

The configuration of the Sana Commerce enhanced search settings provides the possibility to search products by different keywords: title, item number, color, size, description and others.



Use the **Keyword fields** section to extend the webstore search by adding the fields to the index on which the customer can do the search.

The table below provides the description of the keyword fields:

Field	Description

Field name	This dropdown list presents all fields the customer can search on.
Related table	If a field from the items (products) table in your ERP system is related to another table and this field is selected in the **Field name** dropdown, the name of the related table will be shown in this column.
Related table field name	This dropdown list provides all available fields from the related table which can be selected for display. If no field from the related table is selected a value of the field specified in the **Field name** column will be shown by default.

Use the **Filter fields** section to configure filtering and sorting of the products on the search results and product list pages. This means that those fields that are added in the **Filter fields** section can be used to configure filtering and sorting of the products in the webstore. Filtering and sorting can be configured under the **Navigation & search** menu item. These fields are also used to create product sets.

The field names differ depending on your webstore connector. The field names which are at the head of the list and in bold type are optimized connector fields. The data from the standard fields is retrieved from the **Items** table in Microsoft Dynamics NAV/ **Released products** table in Microsoft Dynamics AX, while the data from the optimized fields is retrieved from different places.

The tables below provide the description of the optimized fields:

Microsoft Dynamics NAV

Keyword fields:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Color</td><td rowspan="2">Used to search products by color and/or size. These two fields are used in the Sana Commerce NAV Connector with Fashion add-on and Sana - LS Retail Connector.

If you use Sana Commerce NAV Connector with Fashion add-on the colors are retrieved from the Item Vertical Components table, while sizes are retrieved from the Item Horizontal Components table.

If you use Sana - LS Retail Connector the fields like color, size, style and others created for item variants are used to search products by color, size, style and other available fields. The data from these fields is retrieved from the Extended Variant Dimensions table.</td></tr>
<tr><td>Size</td></tr>
<tr><td>Description</td><td>Used to search products by description. If product description is present in Sana Admin the data will be retrieved from it but not from NAV. If there is no product description in Sana Admin the data is retrieved from the Extended Text table in Microsoft Dynamics NAV. If product description is present in different languages it is also used.</td></tr>
<tr><td>Title</td><td>Used to search products by name. The data is retrieved from the Items table, the Description field. If product names are present in different languages, then product names translations are also used.</td></tr>
<tr><td>Variant Title</td><td>Used to search product variants by name. The data is retrieved from the Item Variants table, the Description field. If product variants names are present in different languages, then product variants translations are also used.</td></tr>
<tr><td>Bar Code</td><td>Used to search products by bar code.</td></tr>
</table>

Filter and facet fields:

Field	Description	Sortable	Facet
Color	Used to filter products by color and/or size. These two fields are used in the Sana Commerce NAV Connector with Fashion add-on and Sana - LS Retail Connector. To be able to use color and size for filtering in standard NAV Connector requires customization. If you use Sana Commerce NAV Connector with Fashion add-on the colors are retrieved from the **Item Vertical Components** table, while sizes are retrieved from the **Item Horizontal Components** table. If you use Sana - LS Retail Connector the fields like color, size, style and others created for item variants are used to filter products by color, size, style and other available fields. The data from these fields is retrieved from the **Extended Variant Dimensions** table.	No	Yes
Size		No	Yes
Gross weight (orderable products only)	Gross weight is not used for sorting or facets. It can be added to the search index to become available as filter for product sets. The data is retrieved from the **Item Units of Measure** table, the **Weight** field.	No	No
Price	Used to sort products by unit price. The data is retrieved form the **Items** table, the **Unit Price** field. The customer specific prices are not used for sorting.	Yes	No
Product category	Used to filter products by product category. The data is retrieved from the **Item Categories** and **Product Groups** tables, the **Description** field, as combination of the item category and product group descriptions. If product categories (item category and product group) are present in different languages, then product categories translations are also used.	No	Yes
Title	Used to sort products by name. The data is retrieved from the **Items** table, the **Description** field. If product names are present in different languages, then product names translations are also used.	Yes	No

Microsoft Dynamics AX

Keyword fields:

Field	Description
Color	Used to search products by color and/or size. The data is retrieved from the **Released product variants** table. The colors are retrieved from the **Color** field, while sizes are retrieved from the **Size** field.
Size	
Description	Used to search products by description. If product description is present in Sana Admin the data will be retrieved from it but not from AX. If there is no product description in Sana Admin the data is retrieved from **Presentations** or **Translations** in Microsoft Dynamics AX. If product description is present in different languages it is also used. For more information about product description in Microsoft Dynamics AX, see "Product Description".
Title	Used to search products by name. The data is retrieved from the **Released products** table, the **Product name** field. If product names are present in different languages, then product names translations are also used.

Variant Title	Used to search product variants by name. The data is retrieved from the **Released product variants** table, the **Product name** field. If product variants names are present in different languages, then product variants names translations are also used.
Bar Code	Used to search products by bar code.

Filter and facet fields:

Field	Description	Sortable	Facet
Color	Used to filter products by color and/or size. The data is retrieved from the **Released product variants** table. The colors are retrieved from the **Color** field, while sizes are retrieved from the **Size** field.	No	Yes
Size		No	Yes
Gross weight (orderable products only)	Gross weight is not used for sorting or facets. It can be added to the search index to become available as filter for product sets. The data is retrieved from the **Released products** table, the **Gross weight** field.	No	No
Price	Used to sort products by base sales price. The data is retrieved from the **Released products** table, the **Price** field.	Yes	No
Product category	Used to filter products by product category. The data is retrieved from the **Item groups** table, the **Name** field. If item groups are present in different languages, then item groups translations are also used.	No	Yes
Title	Used to sort products by name. The data is retrieved from the **Released products** table, the **Product name** field. If product names are present in different languages, then product names translations are also used.	Yes	No

For more information about filtering and sorting, see "Search".

NOTE

Applies to: Microsoft Dynamics AX 2012.

The fields that are marked with the '[Attribute]' tag are used to retrieve product attribute values if such are configured in Microsoft Dynamics AX 2012 for the procurement category hierarchy. For information about product attributes in Microsoft Dynamics AX 2012, see "Product Attributes".

NOTE

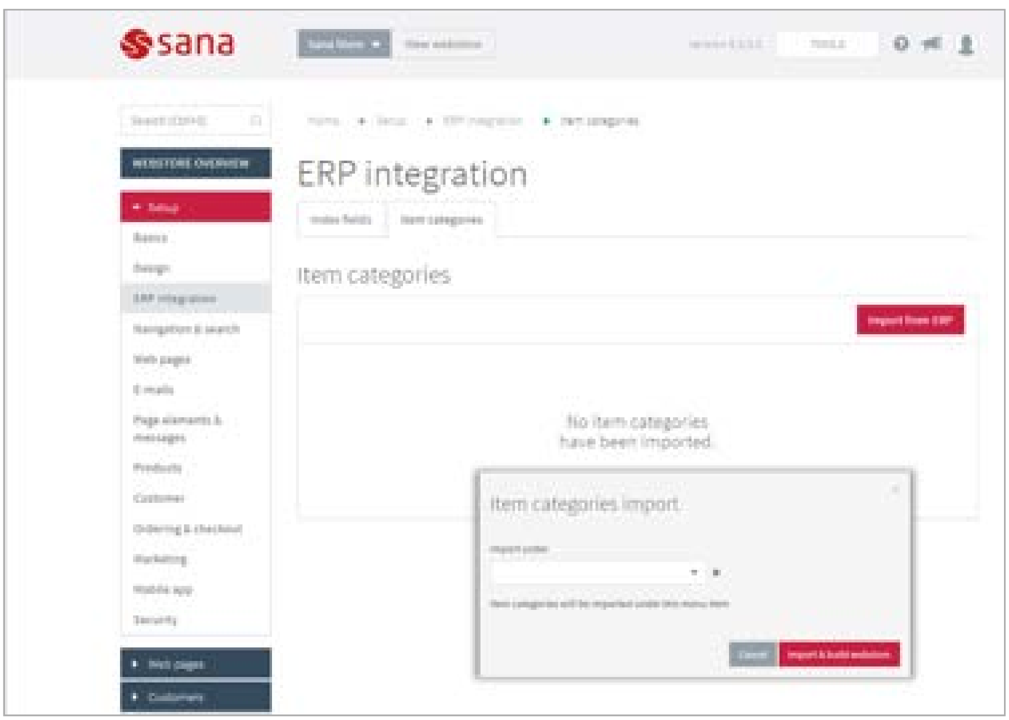
When the index fields are configured or some of the fields have been added or removed the index should be rebuilt. In this case you will receive the message that the index should be updated by running the product import task.

Item categories

Item categories are used to group items (products) that share certain characteristics, for example electronics or women's clothing. It is important for you to keep your catalog well structured, with all the necessary information, so customers can easily find what they are looking for.

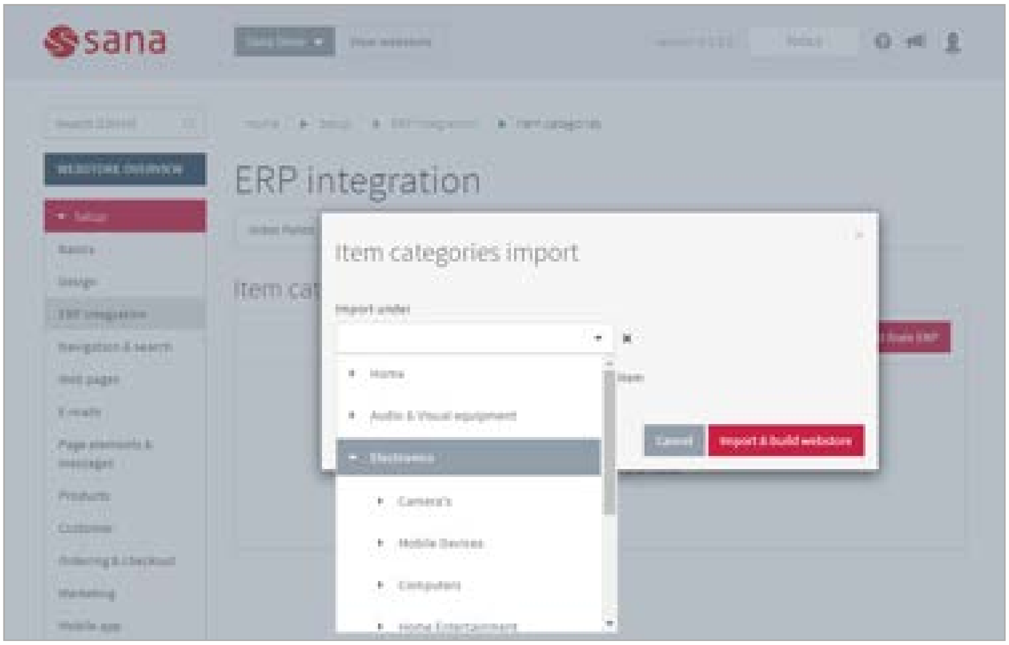
Item categories are managed in the ERP system. When the catalog is ready in your ERP system, and items are assigned to the appropriate item categories, you can import them to Sana to automatically build the main webstore navigation and catalog.

Step 1: Open Sana Admin and click: **Setup** > **ERP Integration** > **Item Categories**.



Step 2: To import all item categories from the ERP system, click **Import from ERP**.

Step 3: Then, in the **Import under** field, you can select the place where your item categories should be imported. Item categories from ERP can be imported only to the main webstore menu.



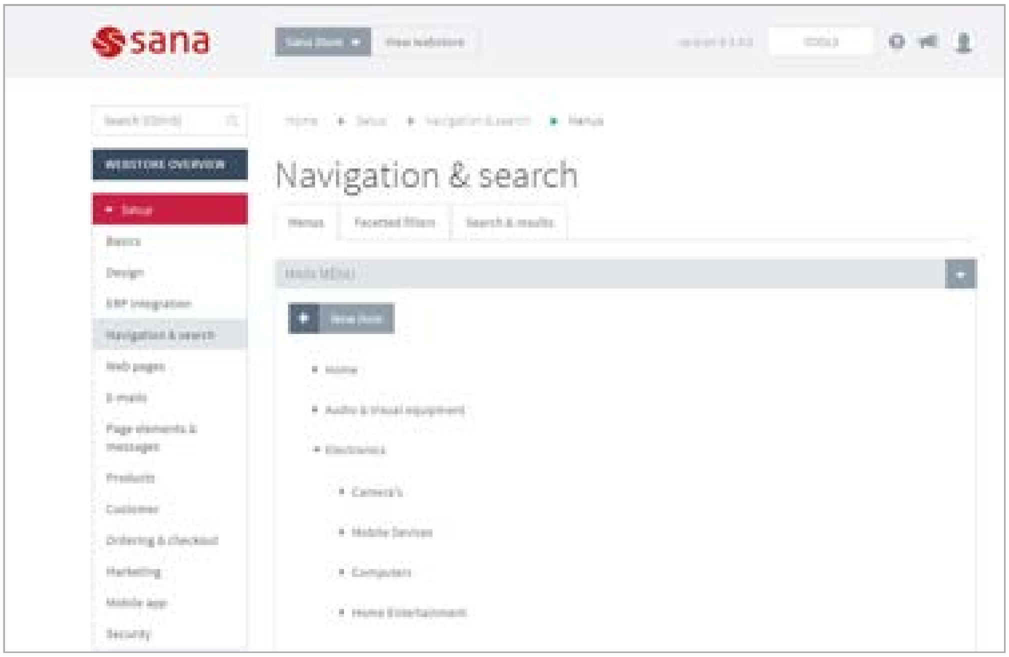
You can import item categories either to the root of the main menu or to one of the existing menu items.

- If you leave the field **Import under** empty, all item categories will be imported to the root of the main menu as the main navigation items of the first level.
- If you select some existing menu item in the **Import under** field, all item categories will be imported to it as sub-items.

Those item categories that are not set to **Visible in Webshop** in your ERP system will be also imported and set to invisible in Sana Admin.

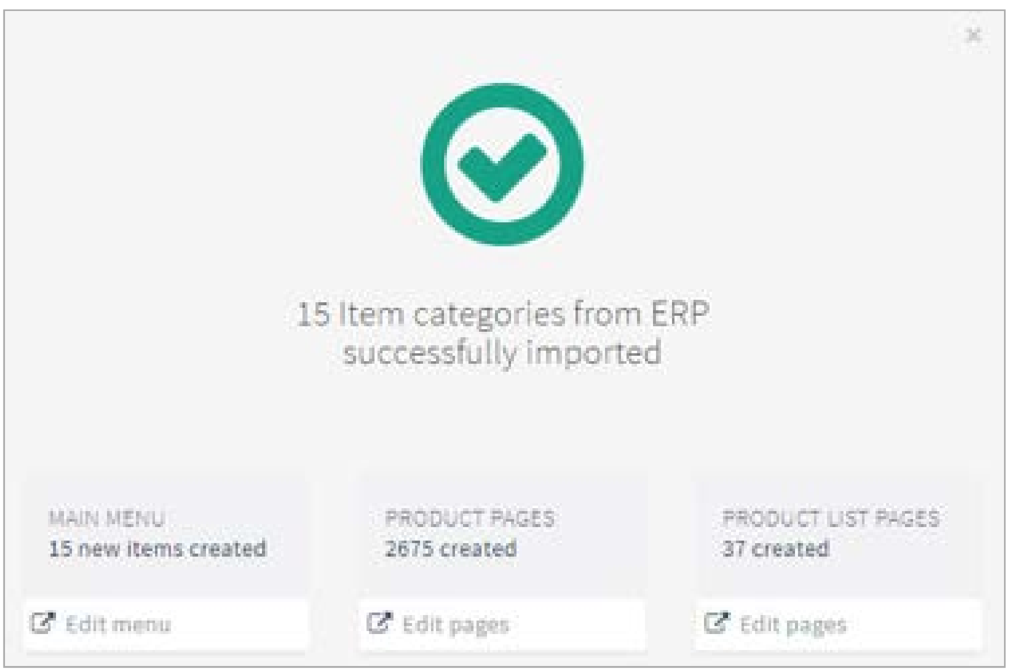
When you import your item categories together with the assigned products from the ERP system to Sana, you automatically build webstore navigation and catalog. If in Sana Admin you go to: **Setup** > **Navigation & search** > **Menus**, in the **Main Menu** you will see the imported item categories from your ERP system.

Also, when you import your item categories, Sana will automatically create product and product list pages with the product sets based on the assigned products to the item categories in your ERP. Product list pages with the product sets will be automatically linked to the created menu items.

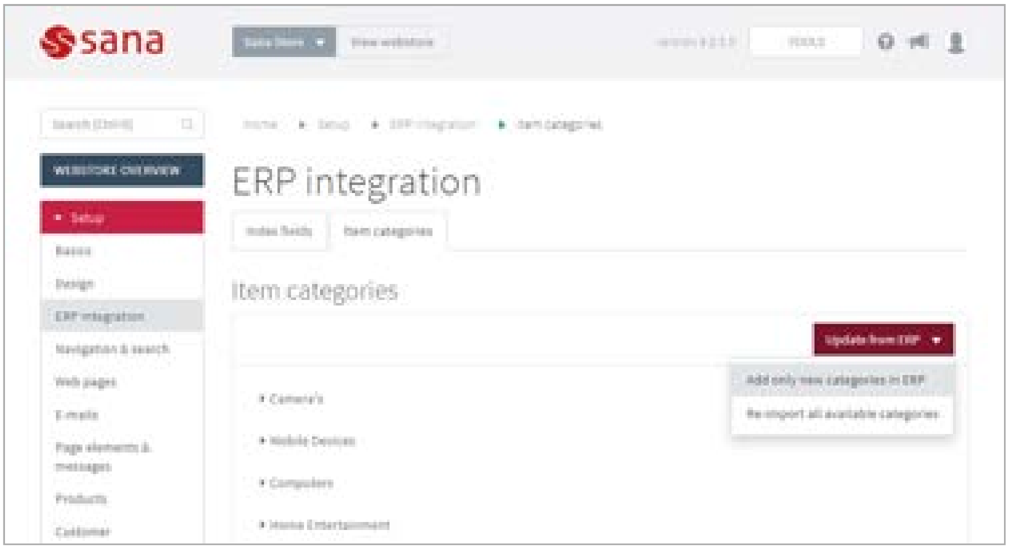


Then if needed, you can edit your menu the way you like. You can change the order in which you want menu items to be shown in the menu by dragging and dropping them. You can also change the level of menu items, either make it as a parent item or as a sub-item to the one of the higher level.

When the item categories have been imported from your ERP system, you will see a pop-up with the results of how many items have been created in the main menu, how many product pages and product list pages have been created.



When item categories have been already imported from your ERP system, you can either update them - select **Add only new categories in ERP** or replace all item categories - select **Re-import all available categories**.



Below you can see the links to the ERP manuals about item categories:

Microsoft Dynamics NAV 2009 - 2016: Item Categories and Product Groups

Microsoft Dynamics NAV 2017: Item Categories

Microsoft Dynamics AX: Product Categories and Item Groups

Microsoft Dynamics 365 Business Central: Item Categories

Microsoft Dynamics 365 for Finance and Operations: Product Categories and Item Groups

Microsoft Dynamics GP: Item Classes

SAP Business One: Item Groups

SAP: Product Hierarchy

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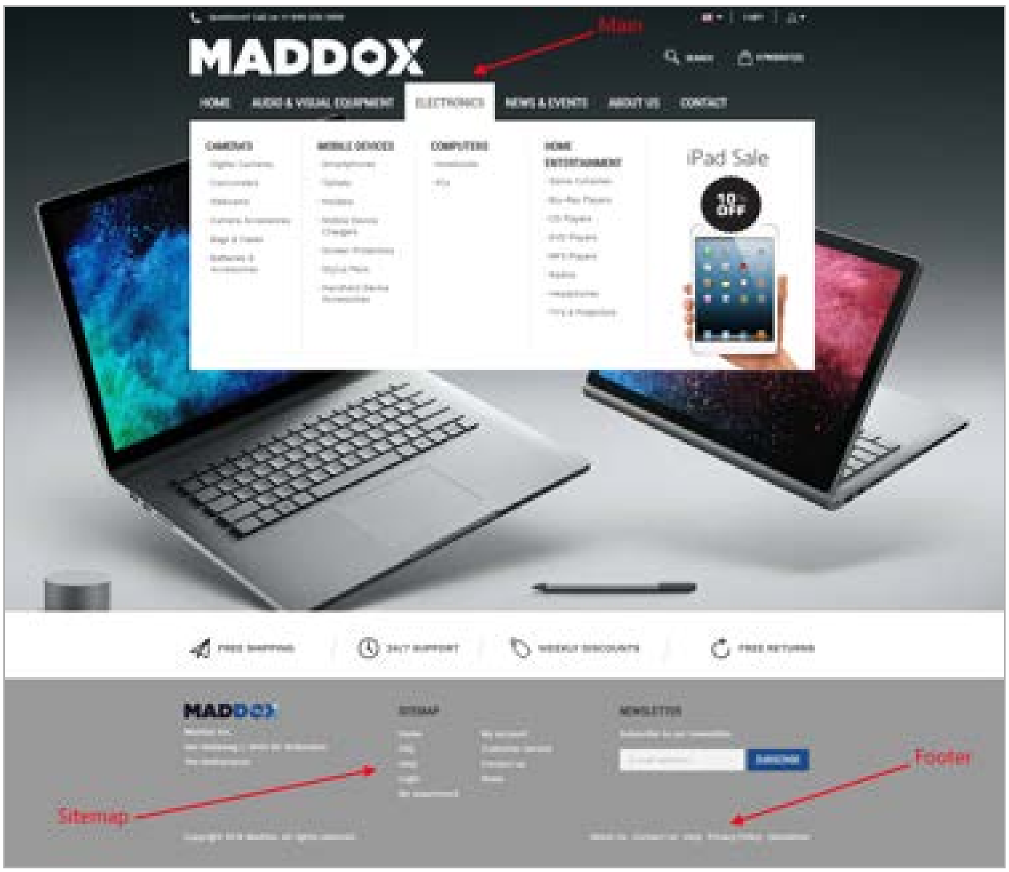
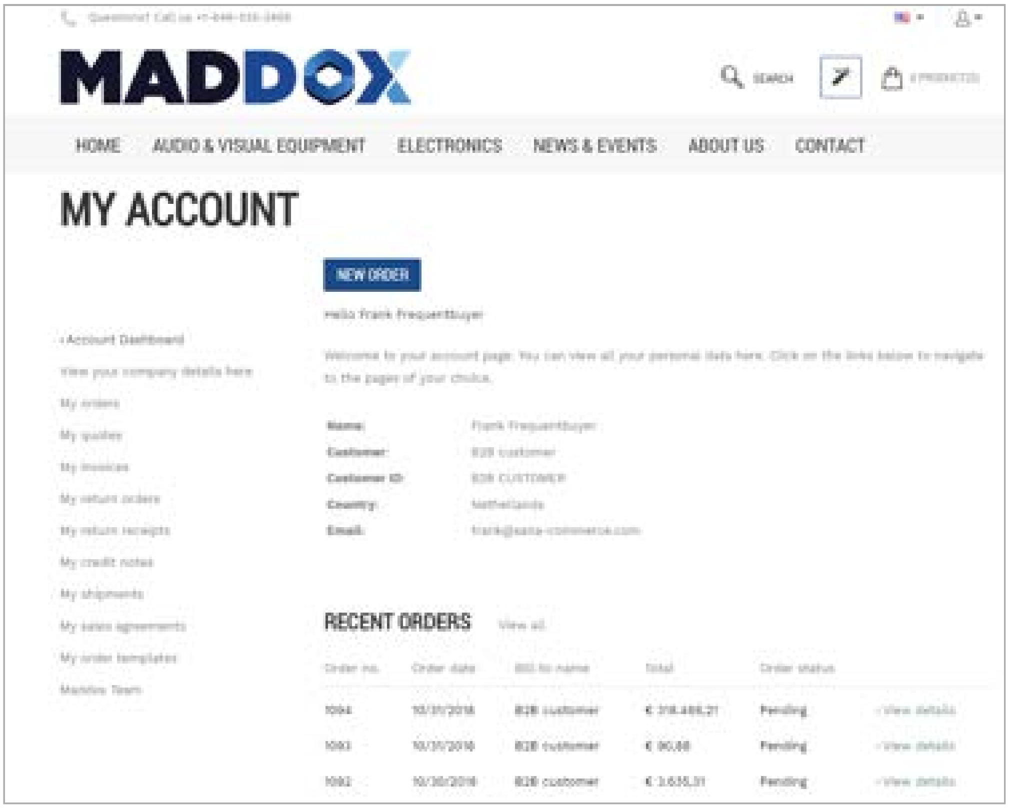
Navigation

Watch the video

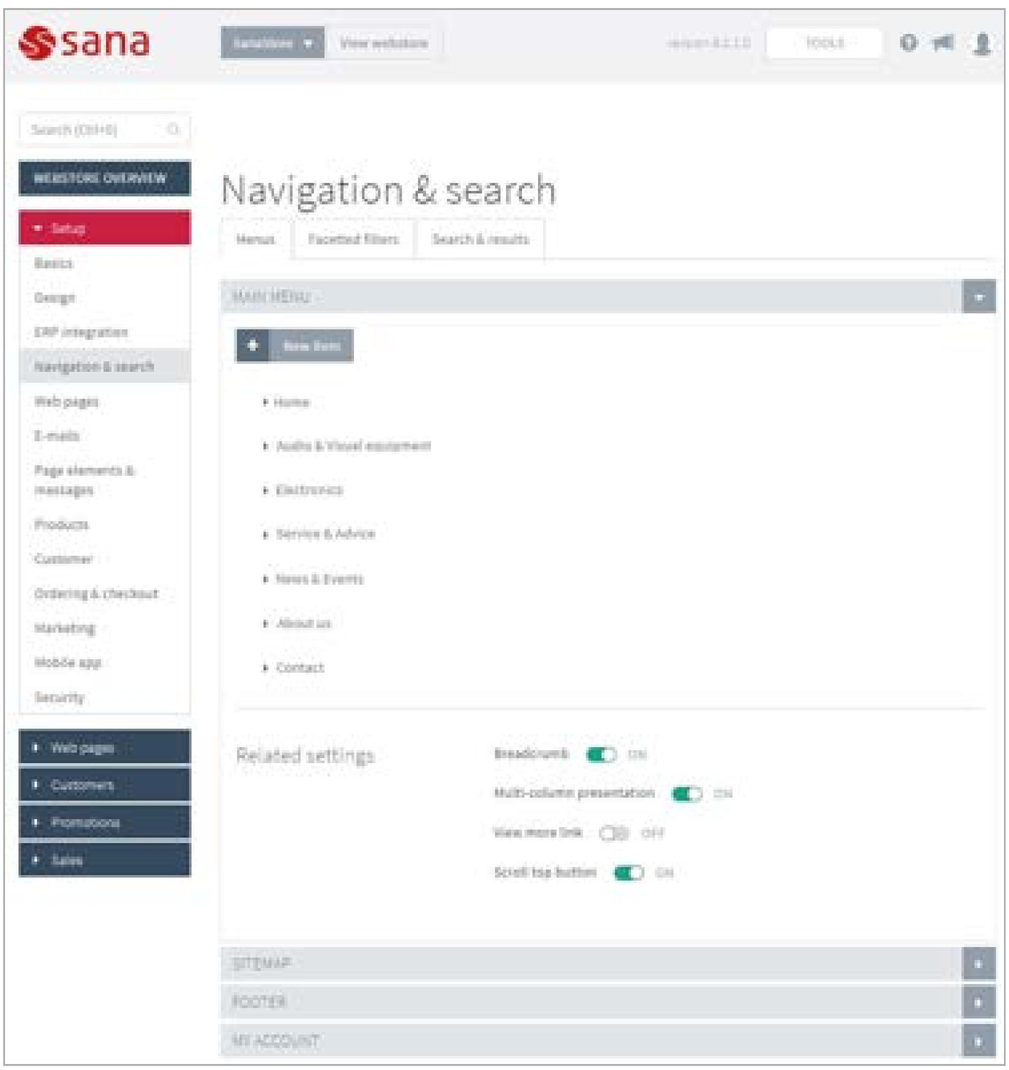
How well your web store navigates is critical to your customers' satisfaction. If your web store is disorganized, you are going to hinder the success of your business. So, to give your customers easier access to particular pages and catalog, you must create web store navigation.

In Sana Admin you can create four types of menus: **Main**, **Sitemap**, **Footer** and **My Account**.





To create a web store navigation in Sana Admin, click: **Setup** > **Navigation & search**.



The table below provides the description of the tabs on the page **Navigation & search**.

Tab	Description
Menus	Using this tab you can create a web store navigation. Four types of menus can be created: **Main**, **Sitemap**, **Footer** and **My Account**.
Facetted filters	Using this tab you can set up facetted filters. Using facets customers can filter the products, for example by size, color or brand, on the product list and search results pages.
Search & results	Using this tab you can set up search settings. Sana provides search settings that allow searching the products by different keywords, phonetic representation of the keywords pronunciation, to narrow or broaden search results, search by a part of the word.

For more information about facetted filters and search settings, see "Search".

Create a web store navigation

Step 1: In Sana Admin click: **Setup** > **Navigation & search** > **Menus**.

On the **Menus** tab, you can create four types of menus: **Main**, **Sitemap**, **Footer** and **My Account**.

Step 2: Expand the necessary menu and click **New item** to create a new menu item.

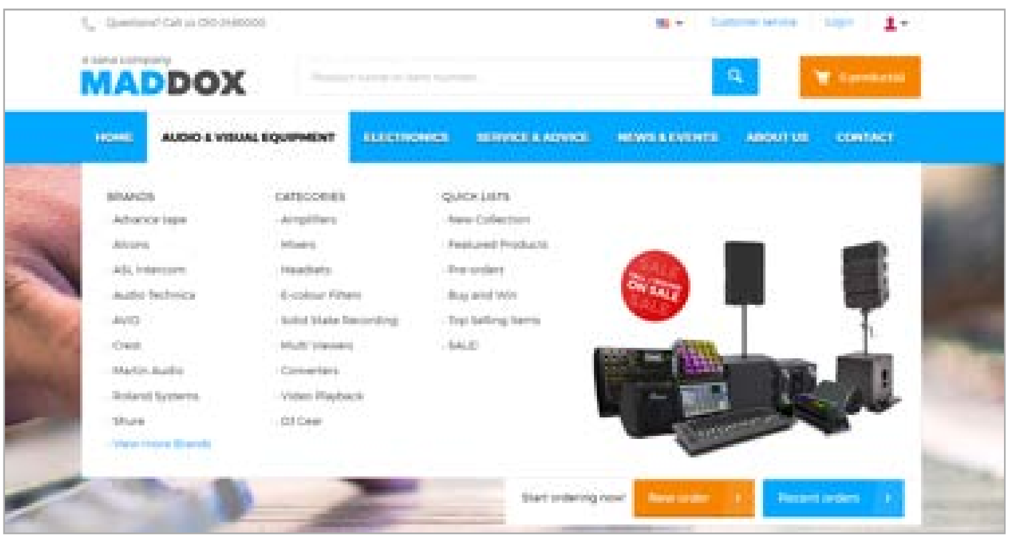
Creation of the menus is completely the same, regardless of its type.

The only difference is that in the **Main menu** section you can also enable or disable the breadcrumb and change the main menu presentation. The main menu is also used for the breadcrumb and on the product pages for linking a product to the related main navigation item.

When the **Breadcrumb** option is enabled, the path on where a customer navigates within the web store will be shown under the main menu.

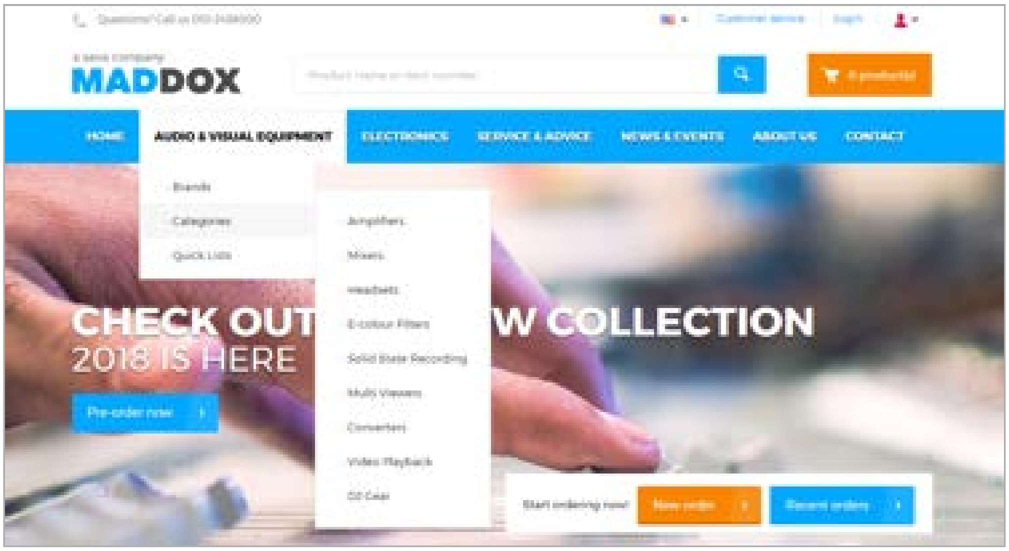
Use the **Multi-column presentation** option to change the presentation of the main menu in the web store.

Below you can see how the main menu looks like when the option **Multi-column presentation** is enabled.



If you use **Multi-column presentation** for the main menu, you can also show the **View more** link in the main menu. It is shown under the navigation items of the third level and refers to the same link which is specified for the navigation item of the second level.

Below you can see how the main menu looks like when the option **Multi-column presentation** is disabled.

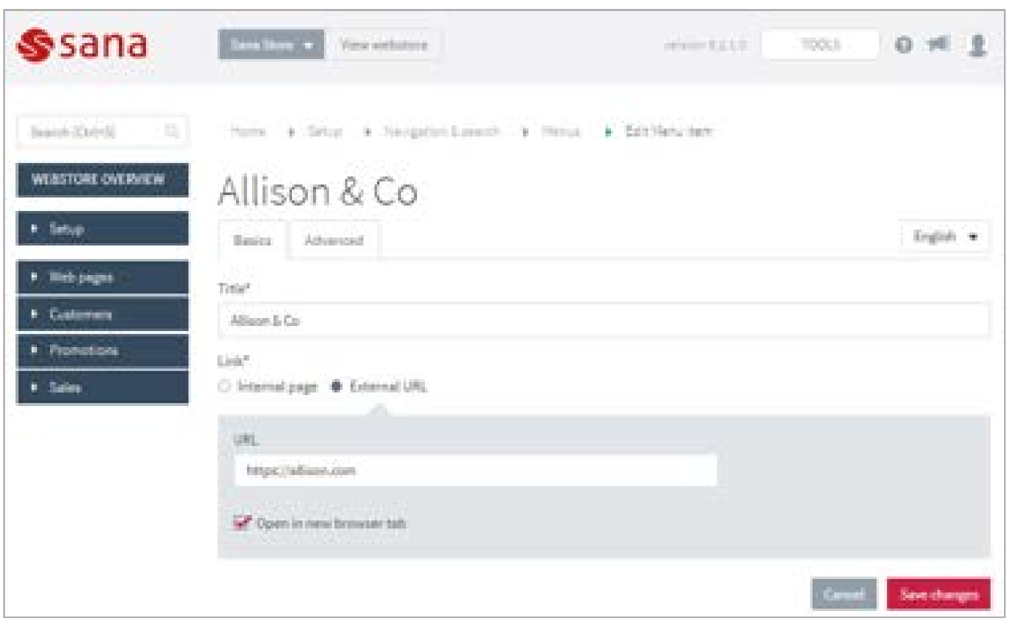


Product categories together with the assigned products can be imported from your ERP system to Sana, to automatically build the main menu of your web store and catalog.

For more information about how to import product categories from your ERP system, see "ERP Integration".

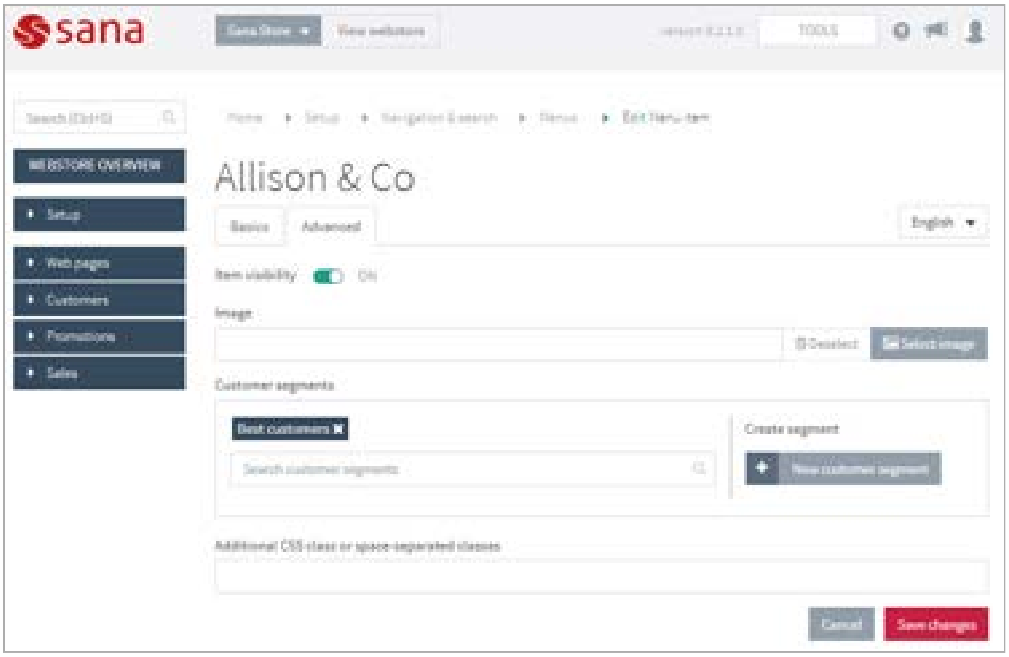
The tables below provide the description of the menu item fields.

Basics



Field	Description
Title	Enter the menu item title. It is shown in the web store menu.
Link	Link the **internal page** or **external URL**. To link the internal page you can search for it by title or URL. You can also create a **blank page** that will be automatically linked to the menu item and fill it with content later on. Select the **Open in new browser tab** checkbox to open the linked internal page or external URL in a new tab or leave it empty to open the page in the same tab.

Advanced



Field	Description
Item visibility	Set visibility of a menu item. Enable **Item visibility** to make the menu item visible in the web store or disable to hide it. Invisible menu items are of a grey color with the icon .
Image	Add an image to a menu item. When you add an image to a parent menu item and link an internal page or external URL to the image, it will be used as navigation item in the main menu, if **Multi-column presentation** is enabled. When child menu items have images and the page that contains the **Child menu items** content element is linked to the parent menu item, then these images will be shown on the linked page as blocks by three in a row. A customer can click on the image to open the related page. Image link for the images added to the child menu items in the navigation is not used. For more information about child menu items content element, see "Child Menu Items".
Customer segments	Using customer segments you can create personalized content. By assigning a customer segment to the menu item you can show any menu item to the target audience. This means that only those customers who are in the customer segment will be able to see the menu item. If you assign a customer segment to a navigation item, then you will see the icon . This way a user can see an overview of all navigation items on a page to which customer segments are assigned and don't need to check the settings of each navigation item. For more information, see "Customer Segments".

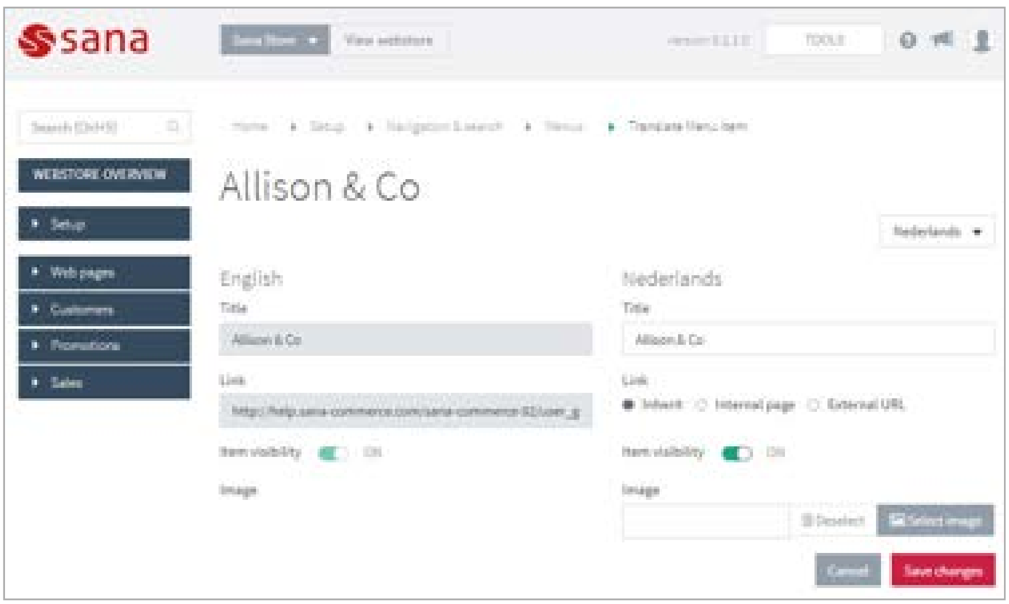
Additional CSS class or space-separated classes	You can add additional CSS class or space-separated classes to the menu item. By adding custom CSS classes to the menu items you can change the style of any individual item. For example, you can change the color of the menu item or use different dimensions for the menu item images. To change the style of a certain menu item you can add a custom CSS class and then add the necessary style using HTML injections in Sana Admin, a design pack or Sana Commerce SDK.

You can change the order in which you want menu items to be shown in the menu by dragging and dropping them. You can also change the levels of menu items, either make it as a parent item or as a child menu item to the one of the higher level. Main navigation can be of multiple levels. If you need to add a subitem, hover over the menu item to which you want to add a subitem and click **New subitem** .

From the menu items list you can edit or delete any menu item. You can also change the linked page, view it in the web store or edit the internal linked page (except system pages) directly from the menu items list. Hover over the menu item to see the **Link**, **Edit** and **Delete** buttons.

Translate a menu item

If your web store is multilingual, you can translate any existing menu item. Hover over the menu item that you want to translate and click **Edit**.



From the language dropdown list select the language you want to translate the menu item to. When the language is selected, the menu item page is presented in two columns. The first column holds the menu item content in the default language (English) and it is not editable, while in the second column you can provide translation to the menu item title.

You can also inherit the linked page (internal page or external URL) from the source menu item or add a new one, as well as set visibility and change the image for the translated menu item. If the image is not specified, the default one from the source menu item will be used.

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Search

Sana search is based on the Lucene search engine. By adding the product fields to the Lucene index you can extend the web store search functionality.

The fields that can be used to set up filtering and sorting of the products in the web store should be added to the index. In Sana Admin click: **Setup** > **ERP integration** > **Index fields**. On the **Index fields** tab, you can also set up the keyword fields that allow to search products in the web store by different keywords: title, item number, color, size, description and other.

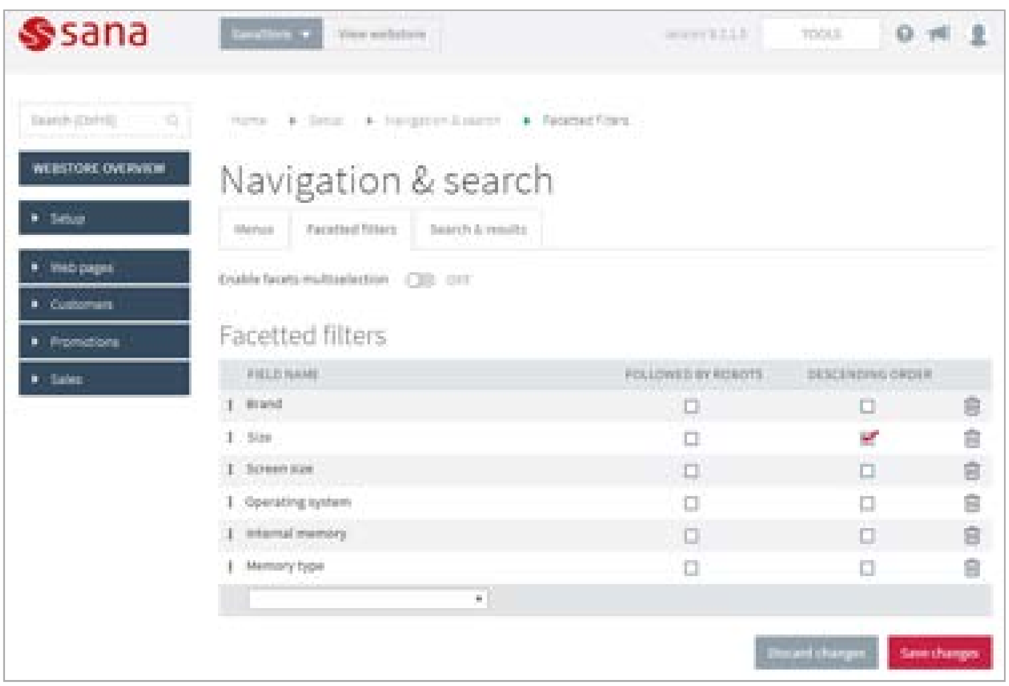
For more information about index fields, see "ERP Integration".

When the fields are added to the index, you can set up filtering and sorting of products.

Facetted filters

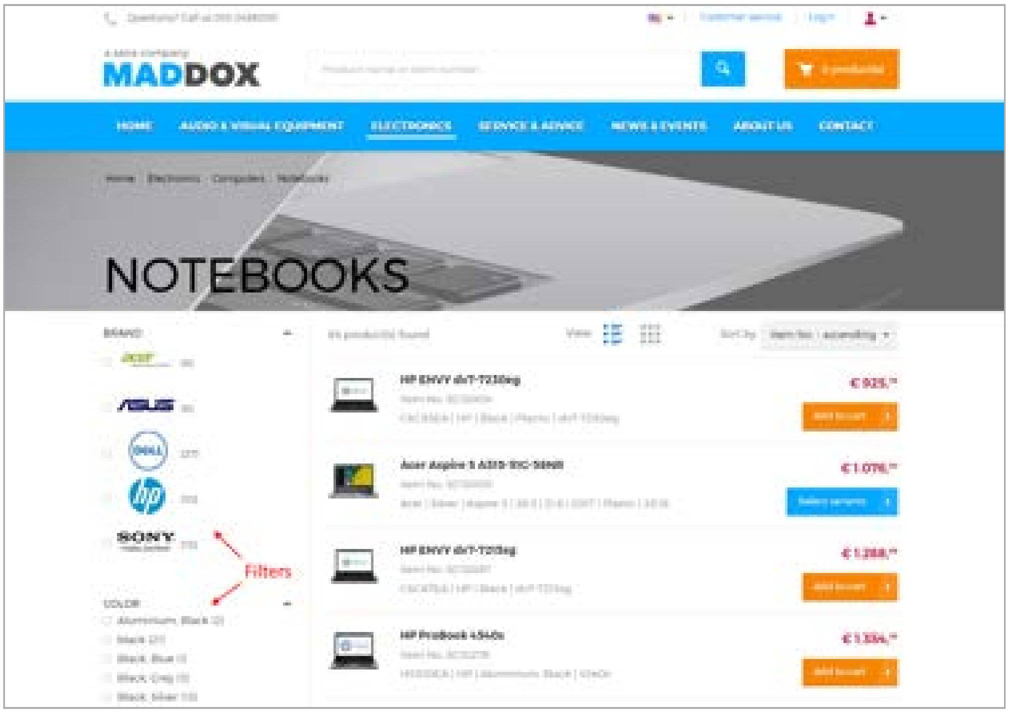
Watch the video

In Sana Admin click: **Setup** > **Navigation & search** > **Facetted filters**.



On the **Facetted filters** tab you can set up filtering of products by adding facets to the web store on the product list and search results pages.

Using facets, a customer can filter the products in the web store, for example by color, size or brand. The facetted filter is shown in the web store on the left of the product list and search results pages.



For each product list page, you can use either the default facetted filters configured on the **Facetted filters** tab, or you can set up the page specific filters for any product list page. For more information, see "Product List Pages".

The tables below provide description of the facetted filters settings.

Facet settings	Description
Enable facets multiselection	This option allows to select multiple facets on the product list and search results pages at once. For example, you want to filter the products by color and size.

Field	Description
Field name	This dropdown list presents all fields which can be used to filter the products using facets. Facet fields become available only after they are added to the search index fields. To add fields to the search index, in Sana Admin click: **Setup** > **ERP integration** > **Index fields** > **Filter fields**. Thus, when you add a search index field which can be used for facets, it becomes available in the **Field name** dropdown of the facetted filters. Depending on the type of the field added to the search index, filtering using facets may not be available.
Followed by robots	Use this option to allow or forbid search engine crawlers to follow the facet items (links) on the product list and search results pages.
Descending order	Use this checkbox to change the order of the facetted filter values on the product list and search results pages. You can sort the values in the ascending or descending order. The order of the facetted filter values is ascending by default. Select the checkbox to change the order.

You can change the order of the facetted filter fields simply by dragging and dropping them. The facets are shown in the web store exactly in the same order as they are defined in the table.

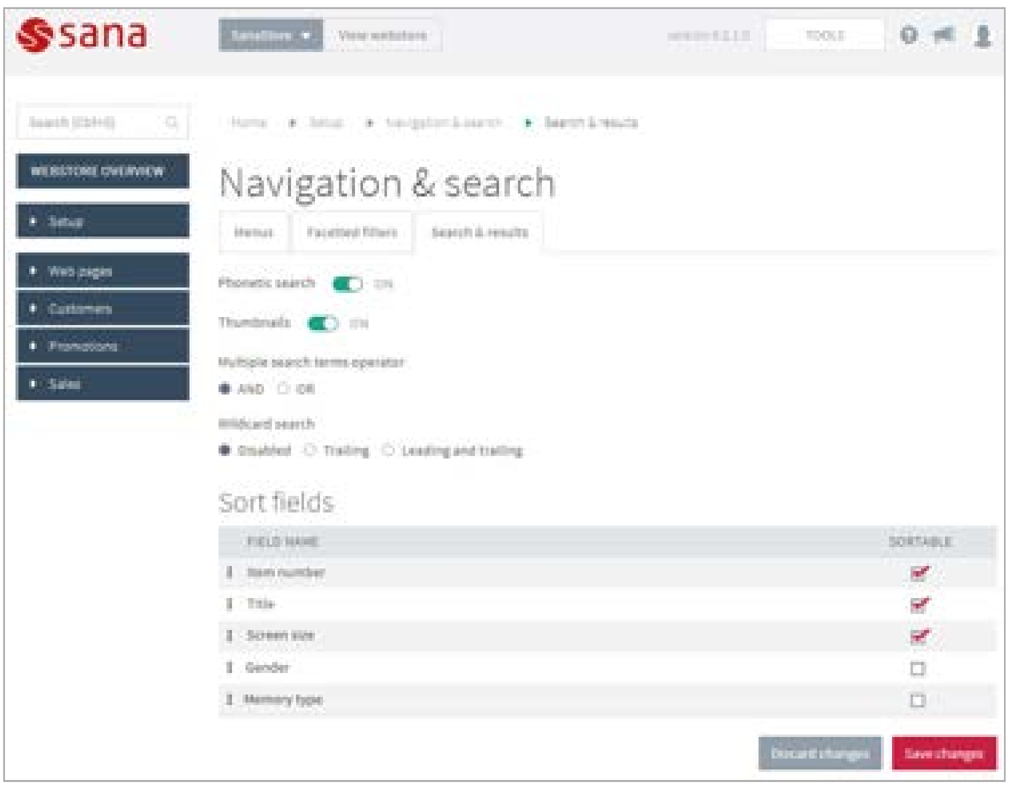
> **NOTE**
>
> When **facets multiselection** is enabled, and a user selects multiple filters, each selected facet will be added to the URL. If you have a lot of facetted filters on a page, it may result in a very long URL that cannot be handled and a user will see an error. If a lot of facets are used in your web store, open the **In-site editor** and click **Create page messages** at the top pane. Search for the page message with the **ProductListUrl_NoneSelected** text identifier. Add a short description to these text messages to build the shorter URLs for the facets. For example, if you have filtering by the operating systems, the description can be "OS".

Search & results

Watch the video

To set up search settings in Sana Admin, click: **Setup** > **Navigation & search** > **Search & results**.

Sana provides search settings that allow searching the products by different keywords, phonetic representation of the keywords pronunciation, to narrow or broaden search results, search by a part of the word.



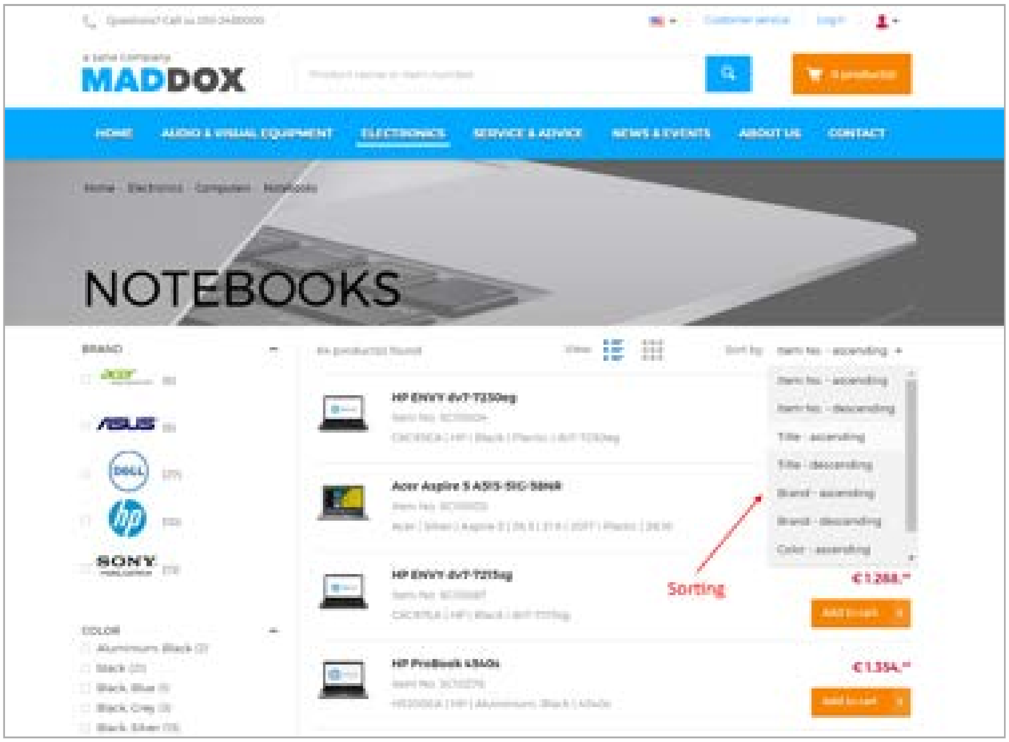
The table below provides the description of the search settings.

Search settings	Description
Phonetic search	Phonetic search provides the possibility to search text by phonetic representation of the keywords pronunciation. This allows to search products not by the exact spelling of the words, but by their pronunciation. It is useful when the customer does not know the exact spelling of the word or misspelt.

<table>
<tr><td></td><td>For example, if you are not sure how to spell the word "discount" you can type "diskaunt", "dizkaunt", "discaunt", in the search field, which is close to the pronunciation of the word "discount".</td></tr>
<tr><td>Thumbnails</td><td>This option allows to show or hide product images on the search results page.</td></tr>
<tr><td>Multiple search terms operator</td><td>Use multiple terms search operators (AND, OR) to determine the relationship between multiple search terms and as a result to narrow or broaden your search by keywords.
AND: Searches for results that include all terms from the query.
For example, if you search for a "black shirt", the query will return all items that contain both words "black" and "shirt".
OR: Searches for all results that include at least one term from the query.
For example, if you search for a "mountain bicycle", the query will return all items that contain either the word "mountain" or the word "bicycle", or both.</td></tr>
<tr><td>Wildcard search</td><td>A wildcard is an asterisk character (*) that is used as a placeholder for any sequence of characters or words. Using wildcard, you can search by a part of the word or you can search for a phrase based on core terms. Note, that if wildcard search is enabled, you should not enter the asterisk character (*) in the query, it is used automatically.

Available options:
Disabled: If this option is selected, the wildcard search is disabled.
Trailing: If this option is selected, the wildcard character is automatically used at the end of the query.
For example, if you search for "bla", the query will return all items that contain words starting with "bla", for example "black". The query looks "bla*", thus in the example "ck" in the word "black" is substituted with a wildcard character (*).
Leading and trailing: If this option is selected, the wildcard character is automatically used at the beginning of the query and at the end.
For example, if you search for "peak", the query will return all items that contain words with "peak" in it, for example "speaker" or "loudspeaker". The query looks "*peak*", thus in the example "s" and "er" in the word "speaker" are substituted with a wildcard character (*).
Remember that wildcard search can be used to search by a part of the word as well as part of a phrase.</td></tr>
</table>

Using search index fields added on the **ERP Integration** page you can configure sorting of the products in the web store, on the search results and product list pages.



The table below provides the description of the **Sort fields**.

Field	Description
Field name	This column presents all fields which can be used for sorting of the products. If you need to add any field, you can do this on the **ERP Integration** page, in the **Filter fields** table. Depending on the type of the field, sorting may not be available.
Sortable	This option allows to sort products by the selected field name.

You can change the order of the sort fields simply by dragging and dropping them. The fields that are used to sort the products are shown on the product list and search results pages in the same order as they are placed in Sana Admin.

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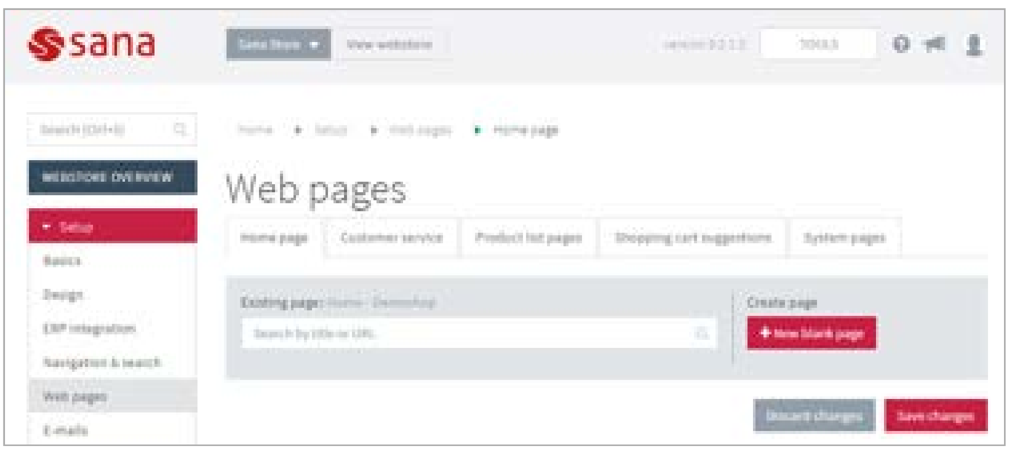
Web Pages

Watch the video

In Sana Admin click: **Setup** > **Web pages**.

On the **Web pages** tab you can:

- Select the **Home page** for your web store.
- Select the **Customer service** page for your web store.
- Set up the default settings for all **Product list pages**.
- Select the page to show **Shopping cart suggestions** to your customers.
- Add content to the **System pages**.



The table below provides the description of the tabs.

Tab	Description
Home page	Any of the existing pages (Flexi-page, Product list page, News item, FAQ page, any system page, such as "Login" page) can be set as your web store home page. You can search for a page by title or URL. You can also create a new blank page that will be automatically set as the home page and then fill it in with content. If you open the list of any existing web pages in Sana Admin, you can also set any of the pages as your web store home page directly from there, by clicking on the button and selecting **Set as home page**.
Customer service	Any of the existing pages (Flexi-page, Product list page, News item, FAQ page, any system page) can be set as your web store customer service page. You can search for a page by title or URL. You can also create a new blank page that will be automatically set as the customer service page and then fill it in with content.

	In the web store the customer service page can be accessed by clicking **Customer service** at the top of the web store, and you can also add this page to one of your web store menus.
Product list page	On this tab you can set up the default settings which will be used for all existing product list pages and for the search results page. You can show or hide product image thumbnails, change the background color and image, choose how products should be presented on a page (list or grid mode), define how many products should be shown on a page in the list and grid view mode, how they should be sorted by default, for example by title or price, and select the type of paging which should be used on the product list pages and search results page to load more products, if there are any. Almost any of these settings can be redefined for each product list page individually. For more information, see "Product List Pages".
Shopping cart suggestions	Here you can select a page which should be used to show product suggestions to a customer. Product suggestions are the most popular products of a customer which are shown based on the customer's sales statistics in the ERP system. For more information, see "Shopping Cart Suggestions".
System pages	You can add various content elements to the **Login**, **Checkout**, **Basket**, **Registration** and **Order confirmation** pages. Content elements can be added to the footer and header of the page. For more information, see "System Pages " and "Content Elements".

For more information about different pages that can be created in Sana Admin, see "Web Pages".

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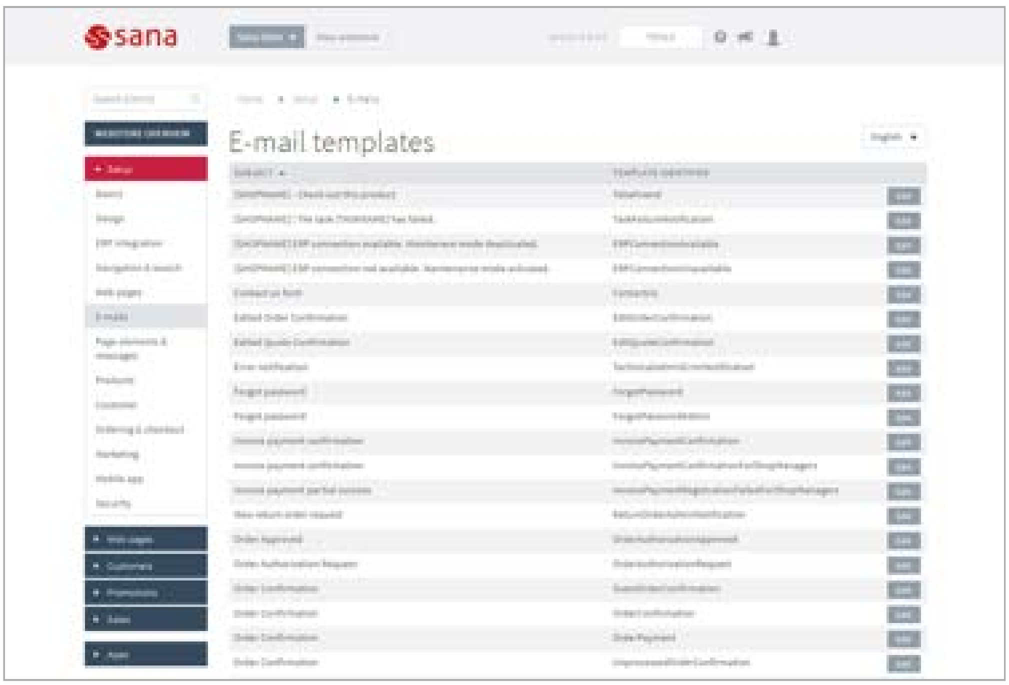
E-mails

There are different e-mail templates which are used in Sana for system e-mails, like order confirmation, payment confirmation, forgot password, etc.

To see e-mail templates, open Sana Admin and click: **Setup** > **E-mails**.

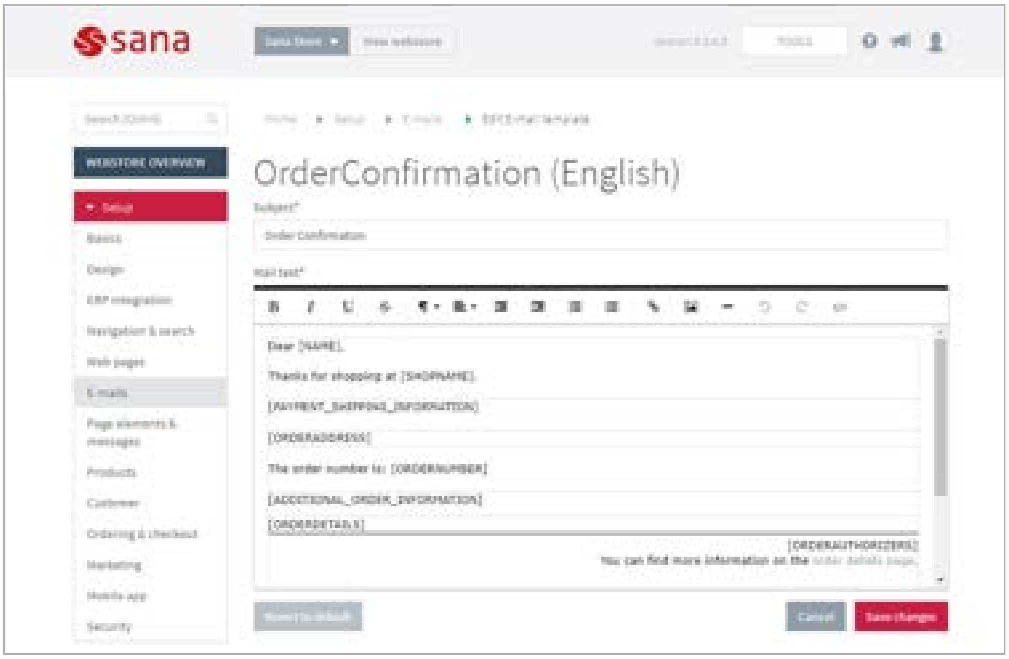


You can change the content of e-mail templates. It is multi-lingual. When you install a language pack, the e-mail templates will be available in the installed language. You can sort the e-mail templates by subject or template identifier.

Subject	**Template Identifier**
[SHOPNAME] - Check out this product	TellaFriend
[SHOPNAME] | The task [TASKNAME] has failed	TaskFailureNotification
[SHOPNAME] ERP connection available, maintenance mode deactivated	ERPConnectionAvailable
[SHOPNAME] ERP connection not available, maintenance mode activated	ERPConnectionUnavailable
Contact us form	ContactUs
Edited Order Confirmation	EditOrderConfirmation

Edited Quote Confirmation	EditQuoteConfirmation
Error notification	TechnicalAdminErrorNotification
Forgot password	ForgotPassword
Forgot password	ForgotPasswordAdmin
Invoice payment confirmation	InvoicePaymentConfirmation
Invoice payment confirmation	InvoicePaymentConfirmationForShopManagers
Invoice payment partial success	InvoicePaymentRegistrationFailedForShopManagers
New return order request	ReturnOrderAdminNotification
Order Approved	OrderAuthorizationApproved
Order Authorization Request	OrderAuthorizationRequest
Order Confirmation	GuestOrderConfirmation
Order Confirmation	OrderConfirmation
Order Confirmation	OrderPayment
Order Confirmation	UnprocessedOrderConfirmation
Order Declined	OrderAuthorizationDeclined
Order payment error	OrderPaymentErrorAdminNotification
Payment Confirmation	PaymentConfirmation
Quote Confirmation	QuoteConfirmation
Quote Confirmation	UnprocessedQuoteConfirmation
Reminder mail	OrderAuthorizationReminderMail
Return order confirmation	ReturnOrderConfirmation
Set account password	NewSubAccountSetPassword
Welcome to [SHOPNAME]!	NewShopAccount
Welcome to [SHOPNAME]!	NewShopAccountByShopAdmin
Your password has been changed	ChangePassword

You can see replacement tags in the e-mail templates. They can be recognized by the brackets in the text of the e-mail template, for example [ORDERNUMBER]. These tags are automatically replaced by the external values when the e-mail is sent, for example order details, customer name, web store e-mail, etc. If you need to change the content of the e-mail template, do not change or translate the replacement tags.



The table below provides the list of all replacement tags which are used in the e-mail templates of Sana. You can also see in which e-mail templates different replacement tags are used.

Name	Description	E-mail templates (by ID)
NAME	The name of a customer in the Sana web store.	ContactUs EditOrderConfirmation EditQuoteConfirmation ForgotPassword ForgotPasswordAdmin InvoicePaymentConfirmation InvoicePaymentConfirmationForShopManagers InvoicePaymentRegistrationFailedForShopManagers ReturnOrderAdminNotification OrderAuthorizationApproved OrderAuthorizationRequest GuestOrderConfirmation OrderConfirmation OrderPayment UnprocessedOrderConfirmation OrderAuthorizationDeclined PaymentConfirmation QuoteConfirmation UnprocessedQuoteConfirmation OrderAuthorizationReminderMail ReturnOrderConfirmation

		NewSubAccountSetPassword NewShopAccount NewShopAccountByShopAdmin ChangePassword
SHOPNAME	The web store name. Only the SHOPNAME variable can be used in the e-mail template subject.	TellaFriend TaskFailureNotification ERPConnectionAvailable ERPConnectionUnavailable EditOrderConfirmation EditQuoteConfirmation TechnicalAdminErrorNotification ForgotPassword ForgotPasswordAdmin InvoicePaymentConfirmation InvoicePaymentConfirmationForShopManagers InvoicePaymentRegistrationFailedForShopManagers ReturnOrderAdminNotification OrderAuthorizationApproved OrderAuthorizationRequest GuestOrderConfirmation OrderConfirmation OrderPayment UnprocessedOrderConfirmation OrderAuthorizationDeclined OrderPaymentErrorAdminNotification PaymentConfirmation QuoteConfirmation UnprocessedQuoteConfirmation OrderAuthorizationReminderMail ReturnOrderConfirmation NewSubAccountSetPassword NewShopAccount NewShopAccountByShopAdmin ChangePassword
SHOPEMAIL	The web store e-mail address.	EditOrderConfirmation EditQuoteConfirmation InvoicePaymentConfirmation OrderAuthorizationApproved OrderAuthorizationRequest GuestOrderConfirmation

		OrderConfirmation OrderPayment UnprocessedOrderConfirmation OrderAuthorizationDeclined PaymentConfirmation QuoteConfirmation UnprocessedQuoteConfirmation OrderAuthorizationReminderMail ReturnOrderConfirmation
SHOPPHONE	The web store phone number.	EditOrderConfirmation EditQuoteConfirmation InvoicePaymentConfirmation OrderAuthorizationApproved OrderAuthorizationRequest GuestOrderConfirmation OrderConfirmation OrderPayment UnprocessedOrderConfirmation OrderAuthorizationDeclined PaymentConfirmation QuoteConfirmation UnprocessedQuoteConfirmation OrderAuthorizationReminderMail ReturnOrderConfirmation
URL	The link to reset the shop account password.	ForgotPassword ForgotPasswordAdmin NewSubAccountSetPassword NewShopAccountByShopAdmin
USERNAME	The name of the web store customer or visitor (not registered user).	TellaFriend
USEREMAIL	The e-mail of the web store customer.	TellaFriend
COMPANYNAME	The company name.	ContactUs
EMAILADDRESS	The e-mail of the company.	ContactUs
PHONE	The phone of the message sender.	ContactUs
CUSTOMERNUMBER	The number of a customer.	InvoicePaymentConfirmationForShopManagers InvoicePaymentRegistrationFailedForShopManagers
COMMENTS	The comments of the message sender.	ContactUs

WEBSITEDOMAIN	The link to the web store. You can find the additional information about website domains at the end of this article.	TellaFriend EditOrderConfirmation EditQuoteConfirmation ForgotPassword ForgotPasswordAdmin InvoicePaymentConfirmation InvoicePaymentConfirmationForShopManagers InvoicePaymentRegistrationFailedForShopManagers ReturnOrderAdminNotification OrderAuthorizationApproved OrderAuthorizationRequest GuestOrderConfirmation OrderConfirmation OrderPayment UnprocessedOrderConfirmation OrderAuthorizationDeclined PaymentConfirmation QuoteConfirmation UnprocessedQuoteConfirmation OrderAuthorizationReminderMail ReturnOrderConfirmation NewSubAccountSetPassword NewShopAccount NewShopAccountByShopAdmin ChangePassword
ORDERADDRESS	The billing and shipping addresses of the sales order.	EditOrderConfirmation EditQuoteConfirmation ReturnOrderAdminNotification GuestOrderConfirmation OrderConfirmation OrderPayment UnprocessedOrderConfirmation PaymentConfirmation QuoteConfirmation UnprocessedQuoteConfirmation ReturnOrderConfirmation
ORDERNUMBER	The sales order ID.	EditOrderConfirmation EditQuoteConfirmation ReturnOrderAdminNotification OrderAuthorizationApproved

		OrderAuthorizationRequest GuestOrderConfirmation OrderConfirmation OrderAuthorizationDeclined OrderPaymentErrorAdminNotification PaymentConfirmation QuoteConfirmation ReturnOrderConfirmation
ORDERDETAILS	The sales order details.	EditOrderConfirmation EditQuoteConfirmation InvoicePaymentConfirmation InvoicePaymentConfirmationForShopManagers InvoicePaymentRegistrationFailedForShopManagers ReturnOrderAdminNotification GuestOrderConfirmation UnprocessedQuoteConfirmation QuoteConfirmation PaymentConfirmation UnprocessedOrderConfirmation OrderPayment OrderConfirmation ReturnOrderConfirmation
ADDITIONAL_ORDER_INFORMATION	The reference number, comments and the requested delivery date of the sales order.	EditOrderConfirmation EditQuoteConfirmation InvoicePaymentConfirmation ReturnOrderAdminNotification GuestOrderConfirmation PaymentConfirmation QuoteConfirmation UnprocessedQuoteConfirmation OrderConfirmation OrderPayment UnprocessedOrderConfirmation ReturnOrderConfirmation
ATTACHMENTS	The links to the return order attachments.	ReturnOrderAdminNotification ReturnOrderConfirmation
PRODUCTTITLE	The product title. It consists of two variables: the PRODUCTTITLE itself and the PRODUCTURL.	TellaFriend

	Separate variables are visible only in the HTML view.	
PRODUCTURL	The direct link to the target product. This variable is only visible in the HTML view and is the part of the PRODUCTTITLE variable.	TellaFriend
MESSAGE	The message added by a customer in the web store.	TellaFriend TechnicalAdminErrorNotification
PAYMENT_SHIPPING_INFORMATION	Order shipping and payment information.	EditOrderConfirmation EditQuoteConfirmation GuestOrderConfirmation OrderConfirmation
PAYMENTTRANSACTIONID	The ID of a payment transaction.	InvoicePaymentConfirmationForShopManagers InvoicePaymentRegistrationFailedForShopManagers
TRANSACTIONID	The ID of a payment transaction.	OrderPaymentErrorAdminNotification
ERRORDETAILS	The details about why the order payment has failed.	OrderPaymentErrorAdminNotification
SUBACCOUNT_NAME	The name of a subaccount in the Sana web store.	OrderAuthorizationRequest
ORDERAUTHORIZER	The name of an authorizer in the Sana web store.	OrderAuthorizationApproved OrderAuthorizationDeclined
ORDERAUTHORIZERS	The names of authorizers in the Sana web store.	EditOrderConfirmation EditQuoteConfirmation InvoicePaymentConfirmation InvoicePaymentConfirmationForShopManagers InvoicePaymentRegistrationFailedForShopManagers GuestOrderConfirmation OrderConfirmation
AUTHORIZATION_FEEDBACK	The comment of an authorizer explaining why the order was declined.	OrderAuthorizationDeclined
DAYS	The number of days that have passed since the last order was created and not authorized (approved or declined).	OrderAuthorizationReminderMail
TASKNAME	The name of a scheduled task that failed.	TaskFailureNotification
TIMESTAMP	Time when the scheduled task failed.	TaskFailureNotification

EXCEPTION	The error that is a reason for the scheduled task failure.	TaskFailureNotification
EXCEPTIONDETAILS	The error details of the failed scheduled task.	TaskFailureNotification
SHOPACCOUNTEMAIL	The e-mail address the customer used to register in the web store online or a web store administrator to create a shop account for a B2B customer directly in Sana Admin. The e-mail is used by the customer to log in to the web store.	NewShopAccount NewShopAccountByShopAdmin

Adding web store URL to the e-mail template

It is possible to create links to the web store in the e-mail template. To do this, just add the link to the page without specifying the domain name. Add [WEBSITEDOMAIN] variable instead of it, thus Sana Admin will take the domain of your web store and will add it to the link automatically. For example, if you want to create the direct link to the home page of your web store, add the following line to the e-mail template text: [WEBSITEDOMAIN]/home.

NOTE

The web store information which is used in the e-mails sent from the Sana web store (store name, store phone number, store e-mail address) can be changed in Sana Admin: **Setup** > **Basics** > **Store information**.

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Setup

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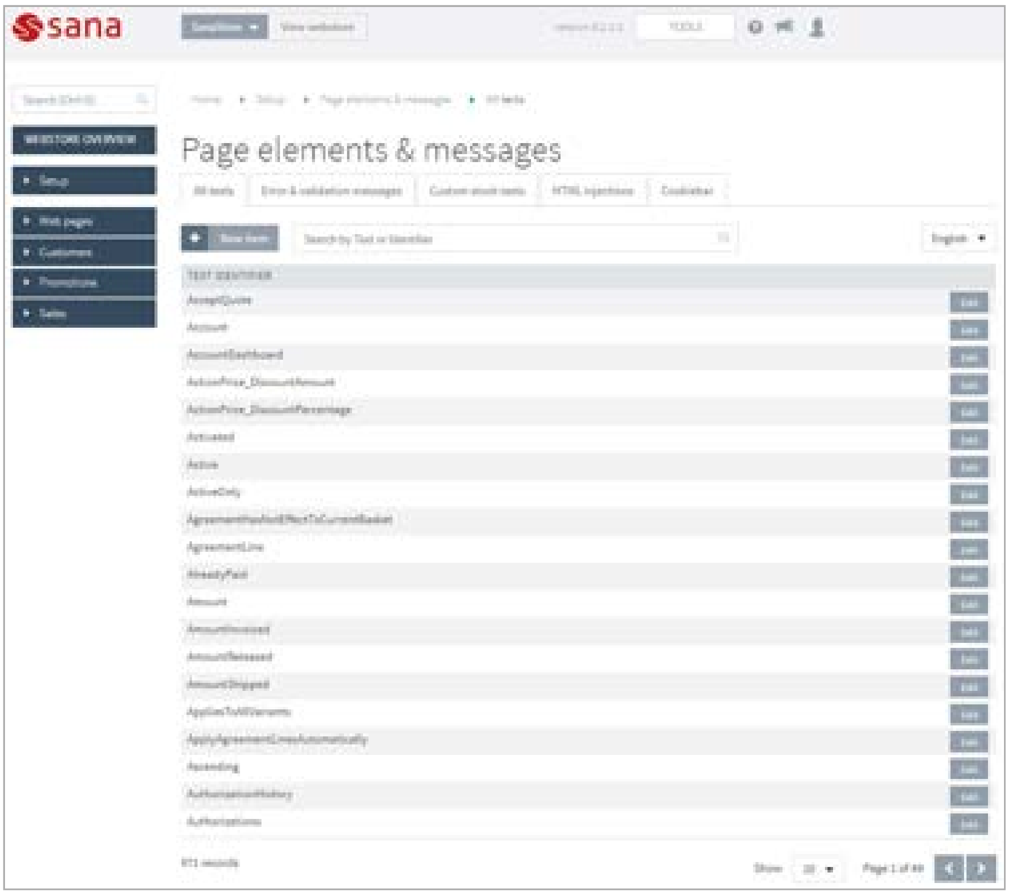
Page Elements & Messages

Watch the video

Page elements & messages are the text items that are shown in the web store. Page elements & messages cover almost all text items: messages, error messages, validation messages, text of the links and buttons, titles and headers (except for the product titles and content page headers), field names, popup descriptions and titles, alt texts of the images, buttons and input fields and others.

To manage page elements and messages in Sana Admin, click: **Setup** > **Page elements & messages**.



You can also create and change page elements & messages directly from the web store in the edit mode using the In-site editor.

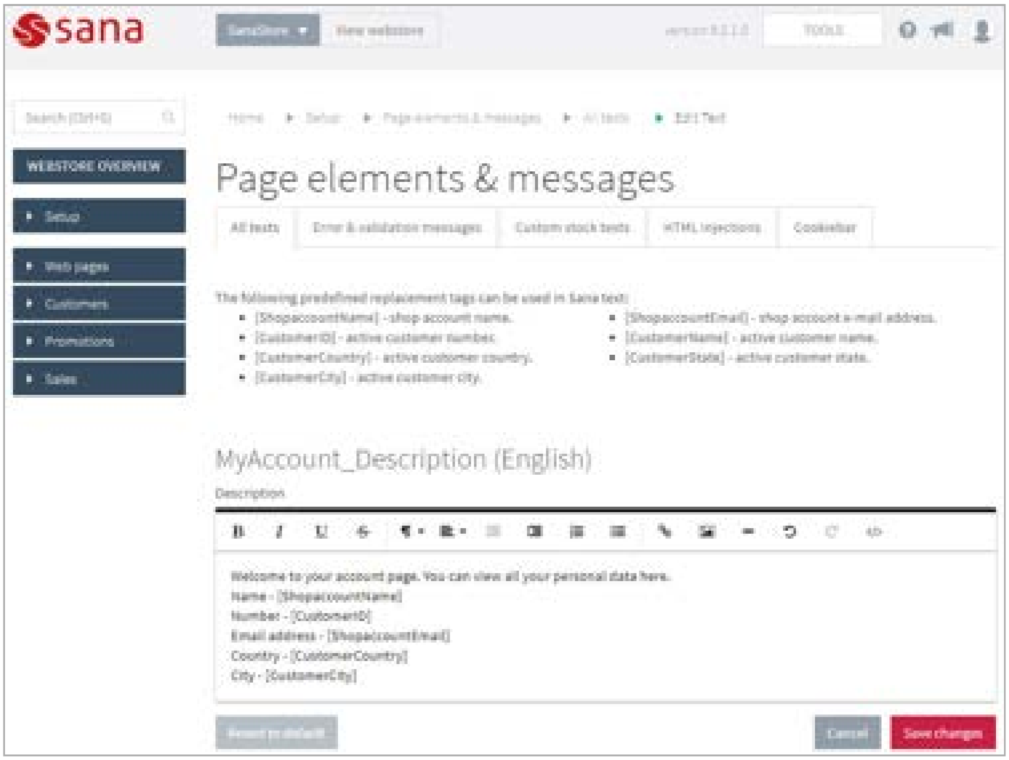
All page elements and messages are divided into text items, error and validation messages and custom stock texts.

The table below provides the description of the tabs.

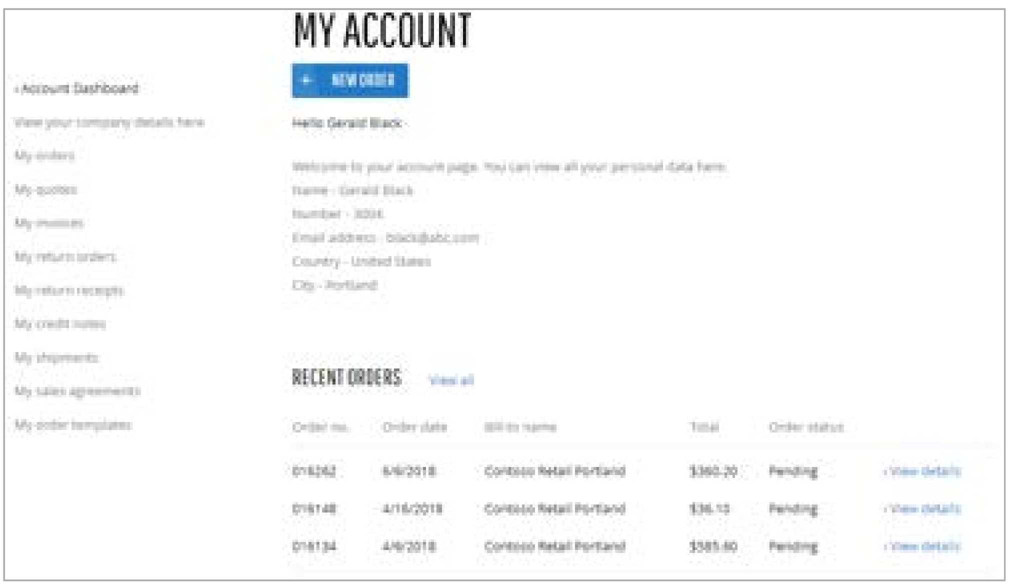
Tab	Description
All texts	You can edit any text items that are shown in the web store, like text of the links and buttons, field names, popup descriptions and titles, alt texts of the images, buttons and input fields, titles and headers, etc.

Error & validation messages	You can edit error and validation messages, for example validation of the required fields.
Custom stock texts	Using custom stock texts you can change stock presentation in the web store per customer type. Stock indicator, stock amount or a simple text can be used. If you want to change stock presentation to a stock indicator, you can simply add the stock indicator images to the custom stock texts. You can also use the replacement tag **[STOCKAMOUNT]** for a stock amount with a simple text or an indicator. For example, [STOCKAMOUNT] in stock. You can change stock presentation for products and product variants that are: • Out of stock • Low stock • In stock For more information about other stock settings, see "Products".
HTML injections	Using HTML injections you can add the custom JavaScript, CSS and HTML to your web store. Below you can read more details.
Cookiebar	You can enable or disable the cookiebar, as well as define how the cookiebar should be presented in the web store. For more information, see "Cookiebar".

You can also use the predefined replacement tags in the page elements of Sana. When you edit some text item, you can see the list of available replacement tags. If you add the replacement tag to the text, it will be automatically replaced with the necessary information in the Sana web store.



For example, you can show additional information about the customer on the **My account** page using replacement tags.



NOTE

If you change any page element or message and it is used in different places, this page element or message will be updated everywhere it is used in the web store.

To create a new text item on the **All texts** tab, click **New** item. Specify the text identifier and add description in the target language. Adding a new page element or message is only useful in case of customization. It is not possible to add a new text item to a location in the web store where no text is present.

Name	Description

Text identifier	The unique identifier of the text item or message.
Description	The actual text that is shown in the web store.

If you have a multi-lingual web store, you can select the necessary language from the dropdown list on the **Page elements & messages** page and change the text item or message in the selected language.

Page elements & messages are available in English by default. If you install any language pack, page elements & messages will be automatically added by the language pack.

For more information about the supported languages, see "Basics".

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HTML Injections

Sana Commerce provides the webstore theme editor that allows to change the webstore design. Without any knowledge of HTML/ CSS a Sana Admin user can change the webstore logo, background image of the webstore, fonts, size and color of the texts and headers and even more, it is possible to change the color of the webstore graphical elements, borders and backgrounds. For more detailed information on what can be changed using the webstore theme editor, see "Themes".

To give you more flexibility in changing the webstore design, Sana Commerce provides an opportunity to inject the custom JavaScript and CSS directly from Sana Admin. JavaScript/ CSS added under the **HTML injections** tab is rendered by default on all pages of the Sana Commerce webstore, except the error pages.

You can add JavaScript/ CSS directly to the fields under the **HTML injections** tab or you can also add the custom CSS file to the accessible folder on the Web server via FTP or File manager in Sana Admin and add reference to this file in one of the fields.

Example: <link href="/content/files/custom.css" rel="stylesheet" type="text/css">

You can use the default Web browser developer tool or any similar tool to identify which ID or class should be targeted to change the style of any element. If you add any custom JavaScript or CSS to your webstore, make sure that it does not conflict with any standard functionality.

When you add JavaScript/ CSS to the **Head** field, it will be added at the end of the <head> tag.
When you add JavaScript/ CSS to the **Body start** field, it will be added at the beginning of the <body> tag.
When you add JavaScript/ CSS to the **Body end** field, it will be added at the end of the <body> tag.

With knowledge of CSS and JavaScript and using HTML injections you can change the style of any element in your webstore or you can use it to add some message. For example, you need to add a pop-up to carry out some survey or to show some important message during a commercial campaign and there is no time to implement it by development, then you can do it using HTML injections directly in Sana Admin.

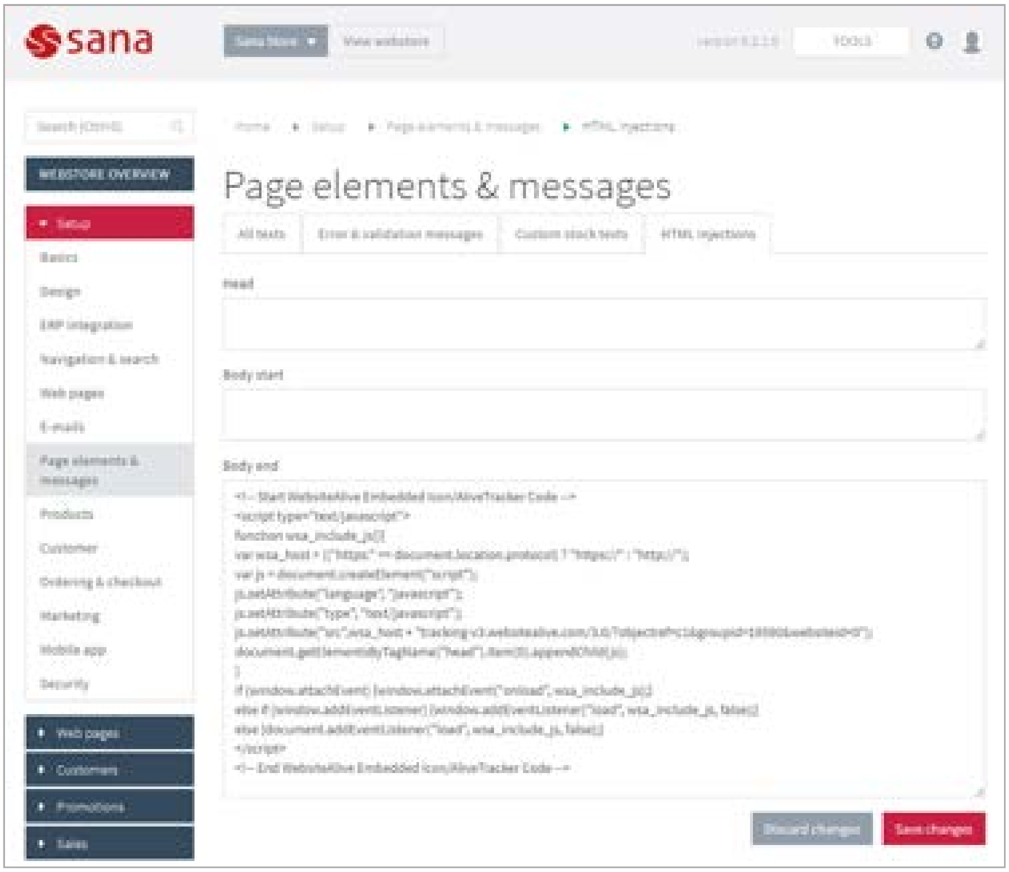
Please, use HTML injections for some minor style changes.

Moreover, using various external services, you can create different widgets and embed them in your webstore. You can create notifications, popups, sliders, live chat, testimonial, news or event announcements and attract your customers attention to different special offers and discounts.

For example, you want to provide 24/7 online support to your customers using a chat, so they can reach you directly from your webstore and ask you any questions. This is the quickest way for your customers to get answers to their questions which provides the personalized service.

There are different free and paid chat services, for example WebsiteAlive which provides a paid tool called AliveChat.

Below you can see the example of the AliveChat widget. When you register on the web site, it will automatically generate JavaScript for you which you can then embed on your web store by adding it to the **Body end** field of the HTML injections.



When you do this, you will see the **Let's Chat!** button at the bottom of your webstore. It will be available on all pages.

Clicking this button opens a chat window and your customers will be able to contact you and ask the questions they are interested in.


MADDOX
HOME
CHECK OUT OUR NEW COLLECTION
2016 IS HERE
Let's Chat
WebsiteAlive
YOUR SUPPLIER OF A/V EQUIPMENT

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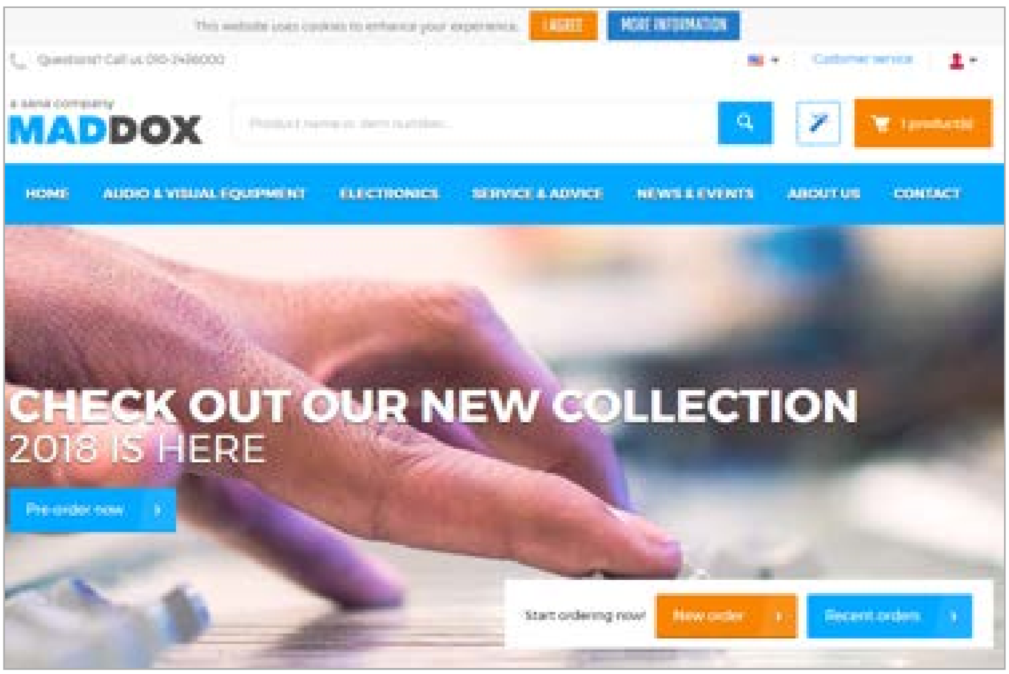
Cookiebar

Watch the video

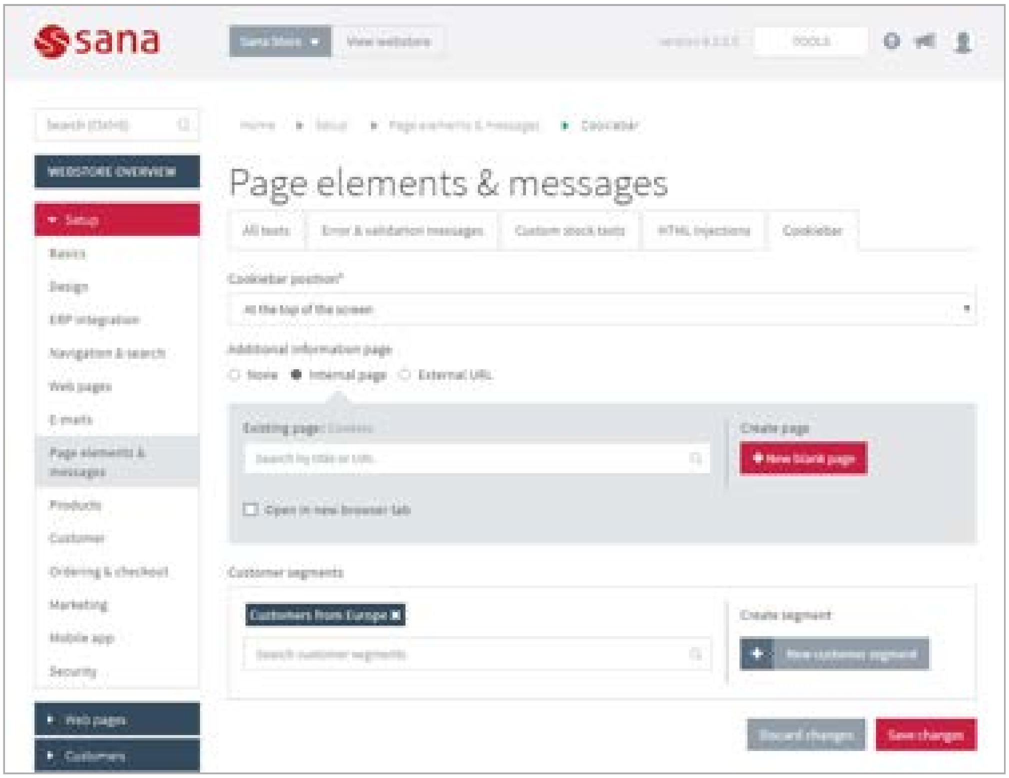
A Sana web store uses cookies for web store functionality and analytics information to identify the user and remember his or her preferences for the sole purpose of providing the service required by the user.

For more information, see "Cookies".

European laws require that web site owners inform their users about the use of cookies. To do this you can add a cookiebar to your web store.



To set up the cookiebar in Sana Admin, click: **Setup** > **Page elements & messages** > **Cookiebar**.

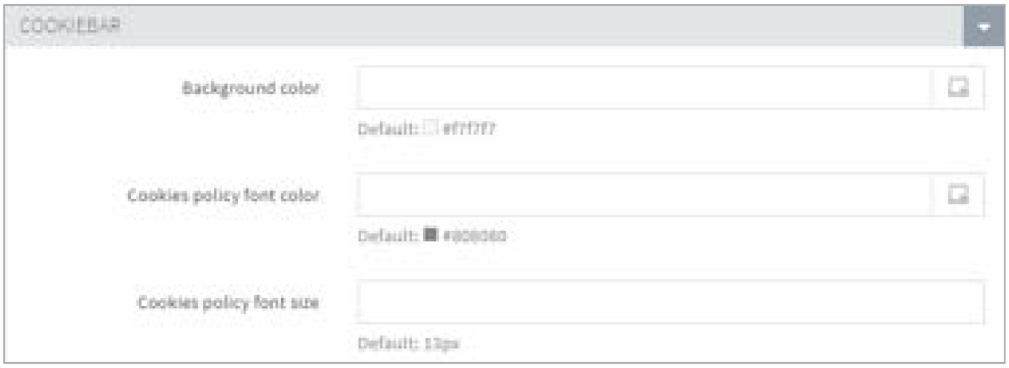


The table below provides the description of the cookiebar fields.

Field	Description
Cookiebar position	Select where you want to show the cookiebar, either **at the top** or **at the bottom** of your web store. Select **Do not show**, if you want to hide the cookiebar.
Additional information page	You can assign any internal page or external URL to the cookiebar that contains some additional information, for example the description of cookies that are used in your web store and other security measures. To link the internal page, you can search for it by title or URL. A user can open this page by clicking on the button **More information** on the cookiebar.
Customer segments	You can assign customer segments to the cookiebar to show it to different customer groups, for example customers from certain countries. For more information, see "Customer Segments".

You can use "In-site editor" to change the text of the cookiebar message and buttons.

You can also change the background color and the font (color and size) of the message of the cookiebar in a web store theme.


COOKIEBAR
Background color
Default: #f7f7f7
Cookies policy font color
Default:
Cookies policy font size
Default: 13px

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Products

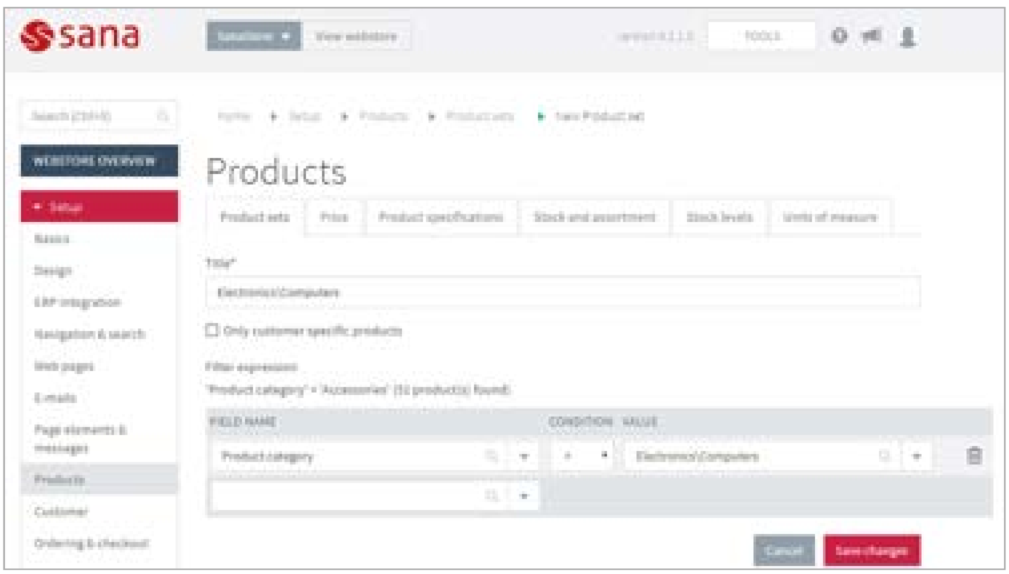
Product sets

Watch the video

Product sets are used to group products using filter expressions based on their characteristics, for example computers, smartphones, clothing, or brand, or other criteria.

Product sets can be added to the product list pages, flexi-pages and product pages.

In Sana Admin click: **Setup** > **Products** > **Product sets**.



Use filter expressions to create a product set:

- Field name
- Condition
- Value

Field names are the product fields that are retrieved from the ERP system and are stored in the Sana index. Therefore, to use different fields to filter and group the products, you must first add them to the index fields in Sana Admin: **Setup** > **ERP integration** > **Index fields** > **Filter fields**. Then, you need to rebuild the product index by running the **Product import** scheduled task.

When you create a product set, filtering of products is performed by **field**, **condition** and **value** and by different filter expressions within the same field. Products which meet all configured filter expressions are added to the product set.

If you define different fields, the products catalog is filtered taking into account all specified fields for a product set. For example, if you create the product set by specifying filter expressions "Price" Equal "100" and "Product category" Equal "Bikes", the products from the

"Bikes" product category which cost "100" will be added to the product set. In this case the products catalog will be filtered and the product set will include the products which are both, from the "Bikes" product category AND cost "100".

If a product set contains filter expressions within the same field, it will include products which fit at least one of the filter expressions of this field or both. For example, if you create the product set by specifying filter expressions "Price" Equal "100" and "Price" Between "200…500" and "Product category" Equal "Bikes", the products from the "Bikes" product category which cost "100" or meet the cost range "200…500" or fit both "100" and "200…500" will be added to the product set. In this case the products catalog will be filtered and the product set will include the products which are from the "Bikes" product category AND fit at least one of the filters by price OR both.

If you need to create a product set where multiple individual items should be excluded, the best solution is to use a range of items which will be visible.

For example: Item No. Less than 3, Item No. Greater than 6, Item No. Between 4 and 5.

The above example means that I want to see all items that are less than 3 but not equal OR greater than 6, but not equal OR between 4 and 5. For such product sets using the condition "Not equal" is not the best way, because by default Sana Commerce uses OR for multiples of the same field.

> **NOTE**
>
> When you see the warning message that the index should be updated, click **Tools** > **Scheduled tasks** and run the **Product import** task to update the index.

Customer specific product sets can be created. Use the **Only customer specific products** option to create a product set with a customer specific or additional products.

When this option is enabled, only customer specific products are included to the product set. This means that products from this product set will be shown only to the customers for whom customer assortment rules are configured in your ERP system.

This way a shop administrator can create a separate page in the web store with the customer specific or additional products only for individual customers.

For such products and related customers, the customer assortment rules must be configured in the ERP system.

> **NOTE**
>
> You should also rebuild the product index by running the **Product import** task in Sana Admin, after you configure the customer assortment rules in your ERP system.

Microsoft Dynamics NAV: Customer Assortment

Microsoft Dynamics AX: Customer Assortment

Microsoft Dynamics 365 Business Central: Customer Assortment

Microsoft Dynamics 365 for Finance and Operations: Customer Assortment

Microsoft Dynamics GP: Customer Assortment

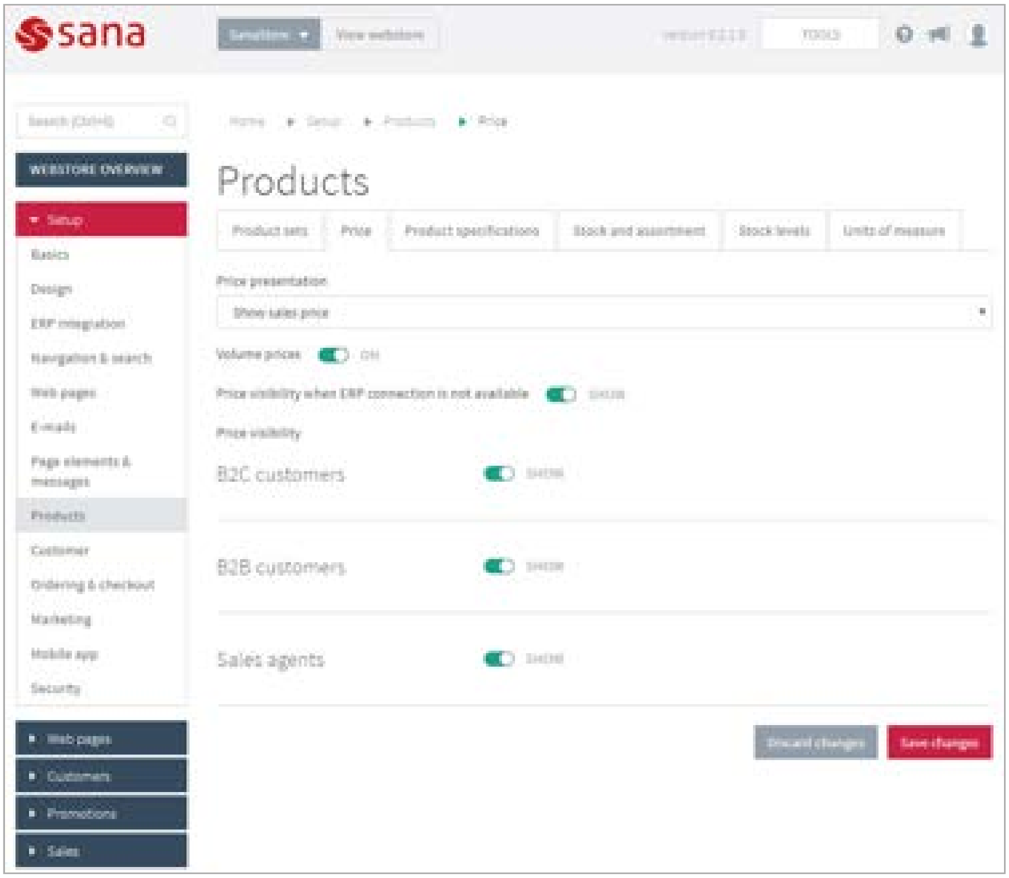
SAP Business One: Customer Assortment

SAP: Customer Assortment

Price

Watch the video

In Sana Admin click: **Setup** > **Products** > **Price**.



On the **Price** tab, you can set up presentation of prices for your Sana web store. All prices are calculated in the ERP system and Sana has no impact on pricing calculation logic of ERP, but gives you flexibility and full control over prices presentation.

The table below provides the description of the settings on the **Price** tab.

Settings	**Description**
Price presentation	Using this option, you can define which prices and discounts from the ERP system you want to show in your Sana web store. This option controls the presentation of prices on the product pages (product list and product details) in the Sana web store. When a customer adds products to the shopping cart all prices, sales taxes and service charges are calculated in the ERP system. You can show: • Sales price • Base (unit) price and sales price • Base (unit) price, sales price and discount percentage (sales line discount)

	- Base (unit) price, sales price and discount amount (sales line discount) - Sales price and discount amount (sales line discount) - Sales price and discount percentage (sales line discount) **Microsoft Dynamics NAV**: Item Prices and Line Discounts **Microsoft Dynamics AX**: Product Prices and Line Discounts **Microsoft Dynamics 365 Business Central**: Item Prices **Microsoft Dynamics 365 for Finance and Operations**: Product Prices and Line Discounts **Microsoft Dynamics GP**: Pricing **SAP Business One**: Item Prices **SAP**: Prices and Discounts
Volume prices	Volume pricing is a pricing strategy that allows discounts for bulk purchases. Typically, it is used to give better pricing to customers who purchase larger quantities of products. If volume prices are available in the ERP system and the **Volume prices** option is enabled in Sana Admin, then in the web store, on the product details page, a customer will see a link **View volume discount** under the product price. Clicking on this link opens the table with volume discounts for a product based on its quantity. **Microsoft Dynamics NAV**: Volume Prices **Microsoft Dynamics AX**: Volume Prices **Microsoft Dynamics 365 Business Central**: Volume Prices **Microsoft Dynamics 365 for Finance and Operations**: Volume Prices **Microsoft Dynamics GP**: Volume Pricing **SAP Business One**: Discounts and Volume Prices **SAP**: Volume Prices
Price visibility when ERP connection is not available	Use this option to show or hide prices when the web store is in the maintenance mode. When you enable this option, you need to reindex the catalog by running the **Product import** task. When the web store is in the maintenance mode, customers can see only the latest indexed list prices. **See also**: Maintenance Mode Unprocessed Orders
Price visibility	Use the **Price visibility** settings to show or hide prices in the web store per customer type. You can show or hide prices in the web store for: - B2C customers - B2B customer - Sales agents

	If you disable price visibility for any customer type, all product prices will not be shown in the web store to the customers of this type.

Product specifications

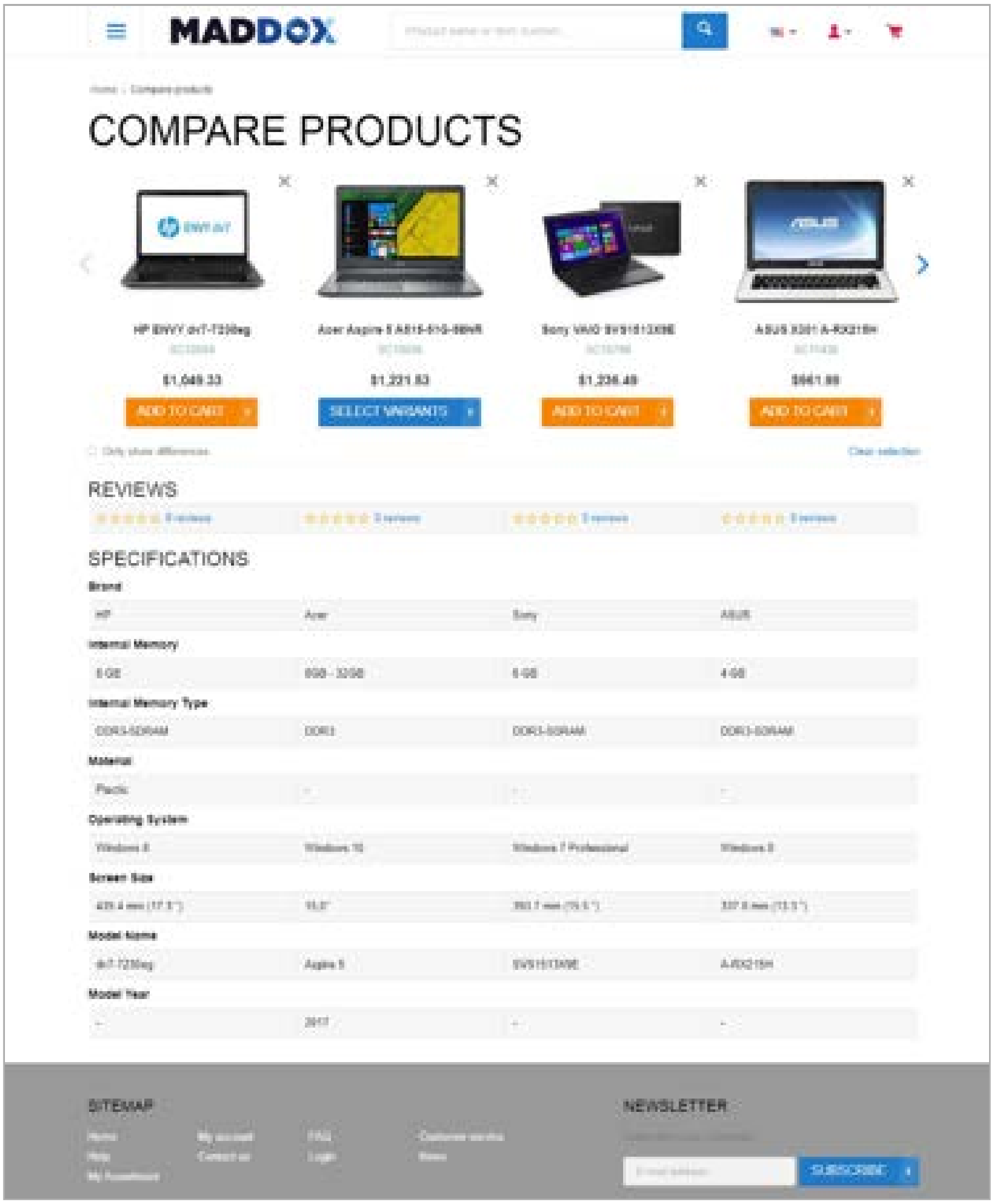
Product specifications are characteristics which can add more information to a product and help further refine your catalog. Any product field from your ERP system can be used for product specifications. Product specifications are shown in the web store on the product details and product list pages.

To manage product specifications, in Sana Admin click: **Setup** > **Products** > **Product specifications**.

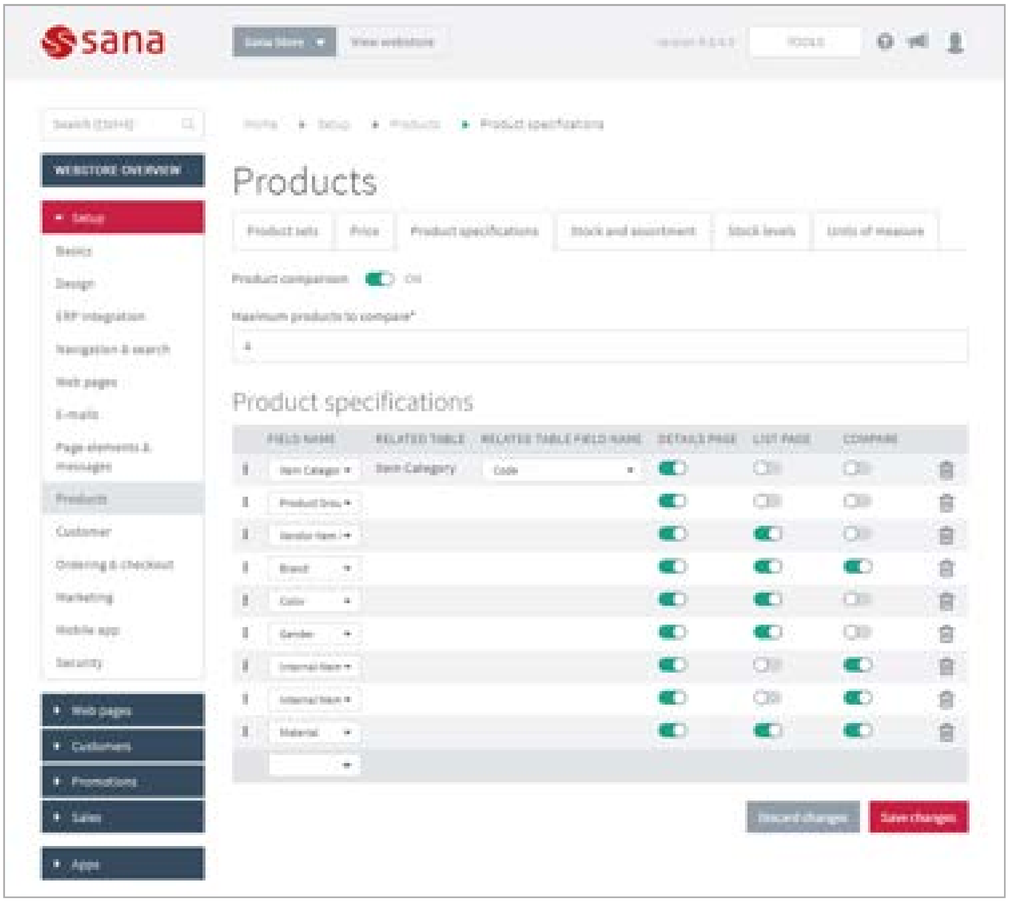
NOTE

Customers can compare products in the Sana web store starting from **Sana 9.3.4**.

Using the **Product comparison** option, you can allow your customers to compare different products in the Sana web store.



If the **Product comparison** option is enabled, in the **Maximum products to compare** field enter the maximum quantity of products a customer can compare simultaneously in the Sana web store. The default value is "10". For more information, see "Product Comparison".

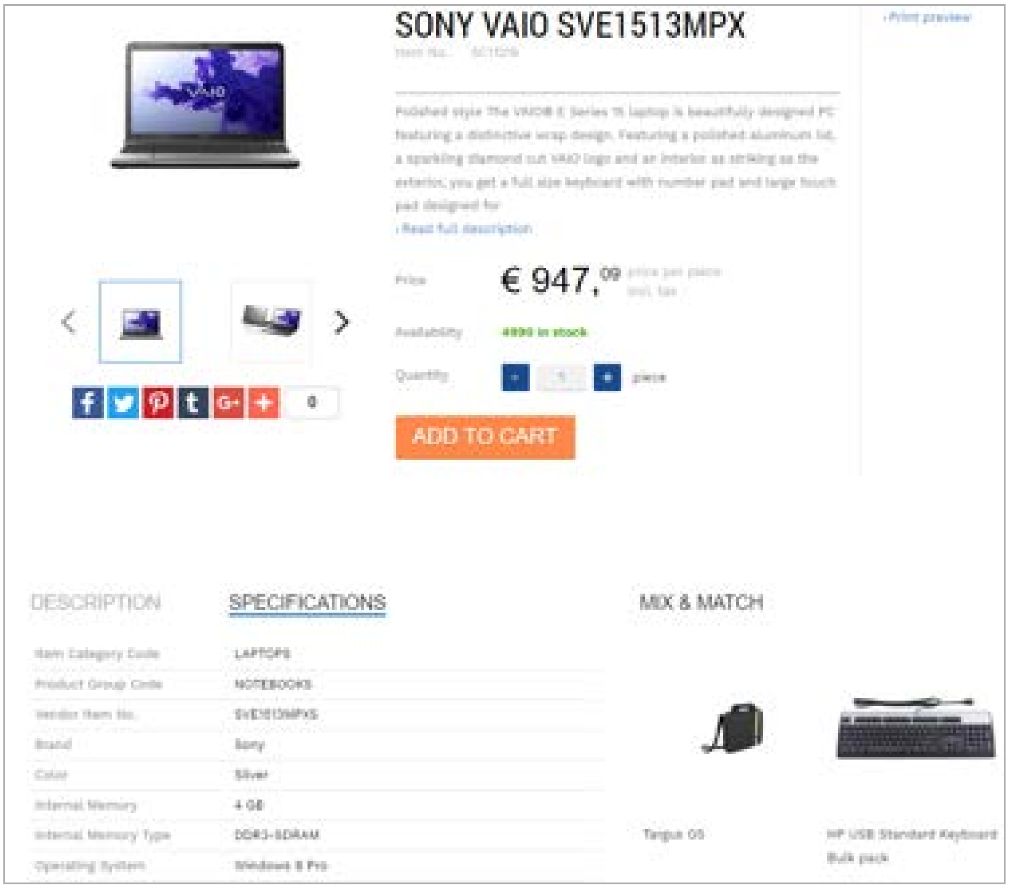


The table below provides the description of the product specifications fields.

Field	Description
Field name	This dropdown list contains all fields that can be used for product specifications to be shown on the product details and/or product list pages. These fields are retrieved from your ERP system.
Related table	If a field from the products (items) table in your ERP system is related to another table, the name of the related table will be shown in the column.
Related table field name	This dropdown list contains all fields from the related table that can be used for product specifications. If no field from the related table is selected, the value of the field set in the **Field name** column will be used.
Details page **List page**	Use toggles in the **Details page** and **List page** columns to show or hide product specifications on the product details and product list pages in the web store.
Compare	Use toggles in the **Compare** column to show or hide product specifications on the **Compare Products** page in the web store. If you do not want to use some specifications for product comparison, you can still show them on the product details and product list pages.

You can sort the product specifications fields just by dragging and dropping them. In the web store product specifications are shown in the same order as they are set in Sana Admin.

In the web store, product specifications can be shown on the product list pages under the product title and on the product details pages on the **Specifications** tab.



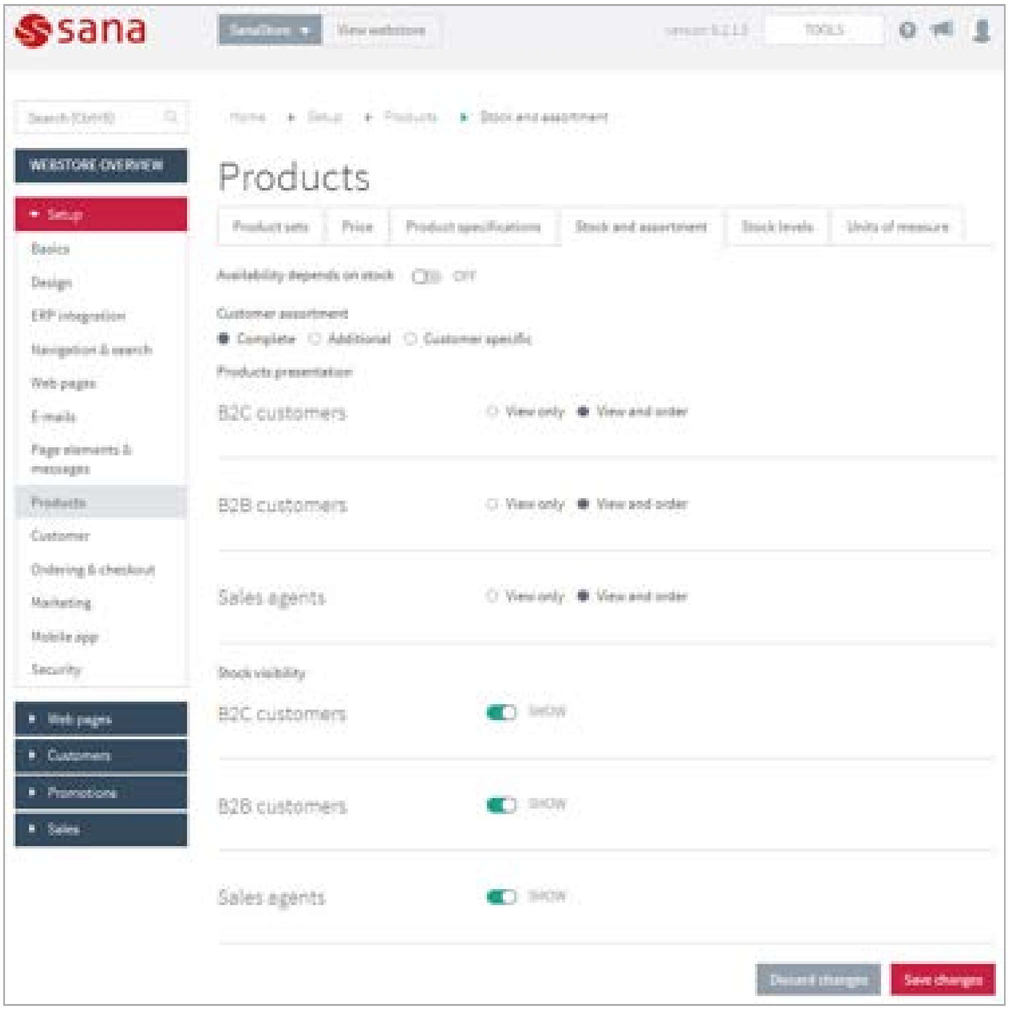
The values for product specifications are retrieved from your ERP system. You can change the default values using the In-site editor. In-site editor allows to change any text items directly from your web store in the edit mode. Use the In-site editor to provide nice product specifications instead of the default ones from your ERP system. Product specifications can be changed for any available language in the web store.

For more information about the editor, see "In-site Editor".

Stock and assortment

Watch the video

In Sana Admin click: **Setup** > **Products** > **Stock and assortment**.



On the **Stock and assortment** tab you can set up products availability, customer assortment, products presentation and stock visibility.

The table below provides the description of the stock and assortment settings.

Settings	**Description**
Availability depends on stock	If this setting is enabled, the availability of a product in the web store is checked each time it is added to the shopping cart. Enabling this option affects web store performance. For more information, see "Product Availability".
Customer assortment	Use this setting to optimize the web store catalog with the products that appeal to all customers as well as products targeted to the individual customers. Available assortment modes: • Complete • Additional • Customer specific For more information, see "Customer Assortment".

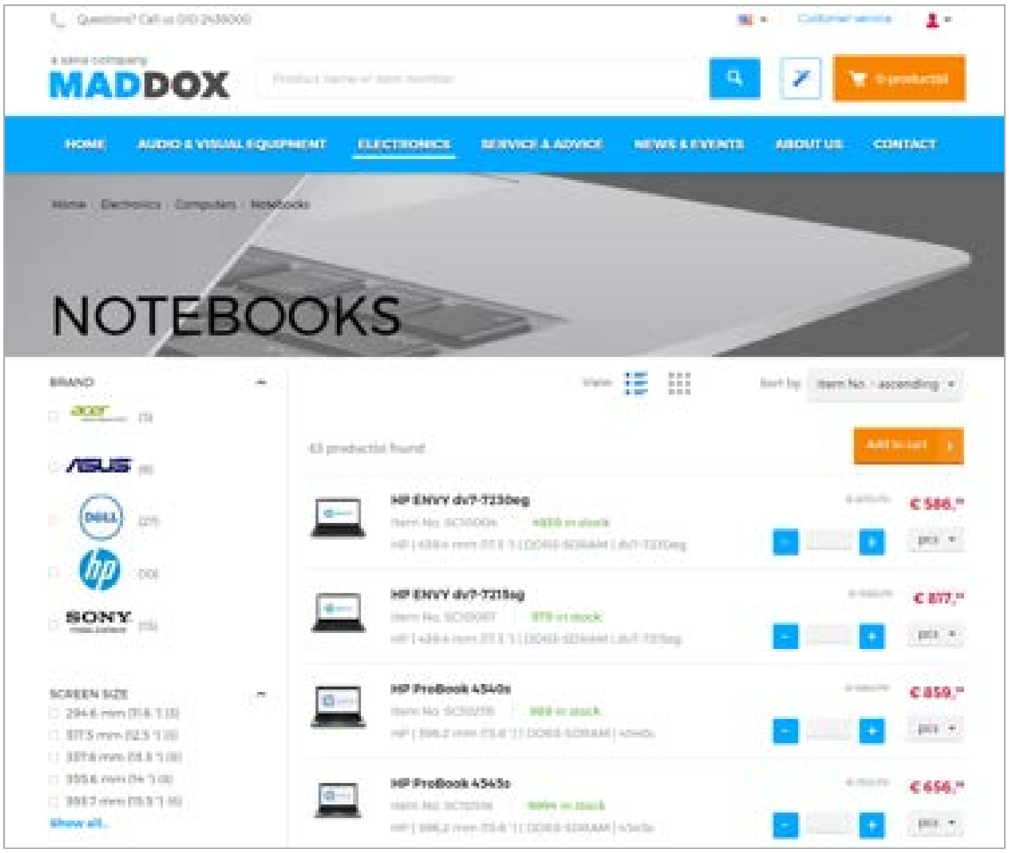
	To be able to use **Additional** and **Customer specific** assortment, customer assortment rules should be set up in your ERP system. **Microsoft Dynamics NAV**: Customer Assortment **Microsoft Dynamics AX**: Customer Assortment **Microsoft Dynamics 365 Business Central**: Customer Assortment **Microsoft Dynamics 365 for Finance and Operations**: Customer Assortment **Microsoft Dynamics GP**: Customer Assortment **SAP Business One**: Customer Assortment **SAP**: Customer Assortment You can also create customer specific product sets. Such product set contains only customer specific products. For more information, see "Product sets".
Products presentation	Use this setting to enable or disable ordering of products per customer type. You can either allow to view products, but not to order (**View only**), or to view and order products (**View and order**) in the web store. Products presentation can be set up for: • B2C customers • B2B customers • Sales agents
Stock visibility	Use this setting to show or hide stock in the web store per customer type. Stock can be enabled or disabled for: • B2C customers • B2B customers • Sales agents On the **Stock levels** tab, you can set up stock ranges to determine products that are: • Out of stock • Low stock • In stock For more information, see "Stock levels" below. You can also change stock presentation in the web store. Using **Custom stock texts**, stock can be presented as an indicator or amount, or as a simple text. For more information, see "Page Elements & Messages".

Stock levels

Watch the video

In Sana Admin click: **Setup** > **Products** > **Stock levels**.

Product stock is calculated in and retrieved from the ERP system. It is shown on the product list and product details pages of a Sana web store.



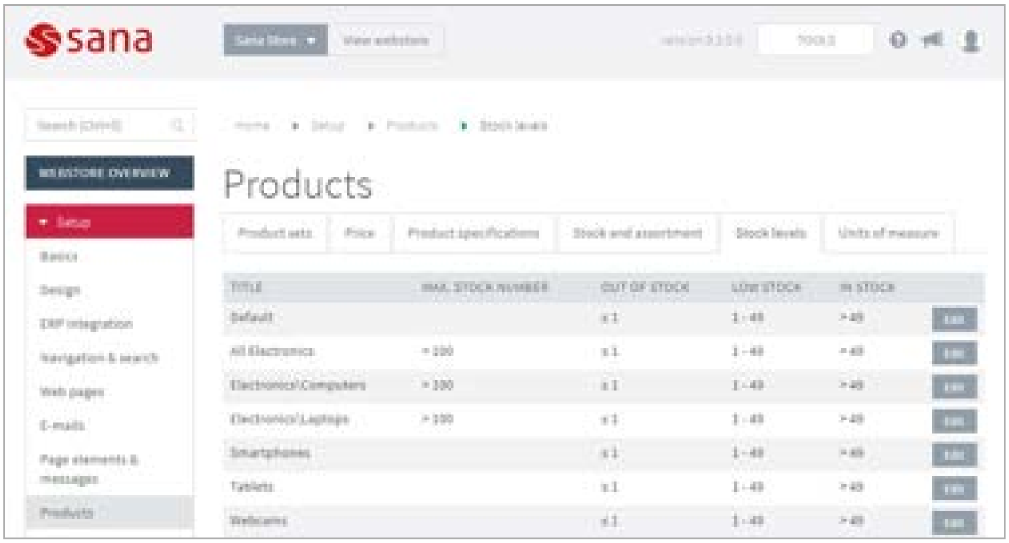
In Sana Admin you can set up three levels of stock indication:

- Out of stock
- Low stock
- In stock

You can specify stock ranges for each level.

Stock level settings are used only for stock presentation in the Sana web store, but have no impact on stock calculation.

Configuration of stock levels is performed for each product group/product category from your ERP system. This means that when you set up stock levels, they will be used for all products assigned to the product group/product category.



The **Default** category represents the default stock levels. All subcategories inherit stock ranges from the parent category.

In some cases, web store administrators don't want to show exact stock to the customers in a web store, but they want to show instead that there are more than 100 units of a product available in stock (>100), for example.

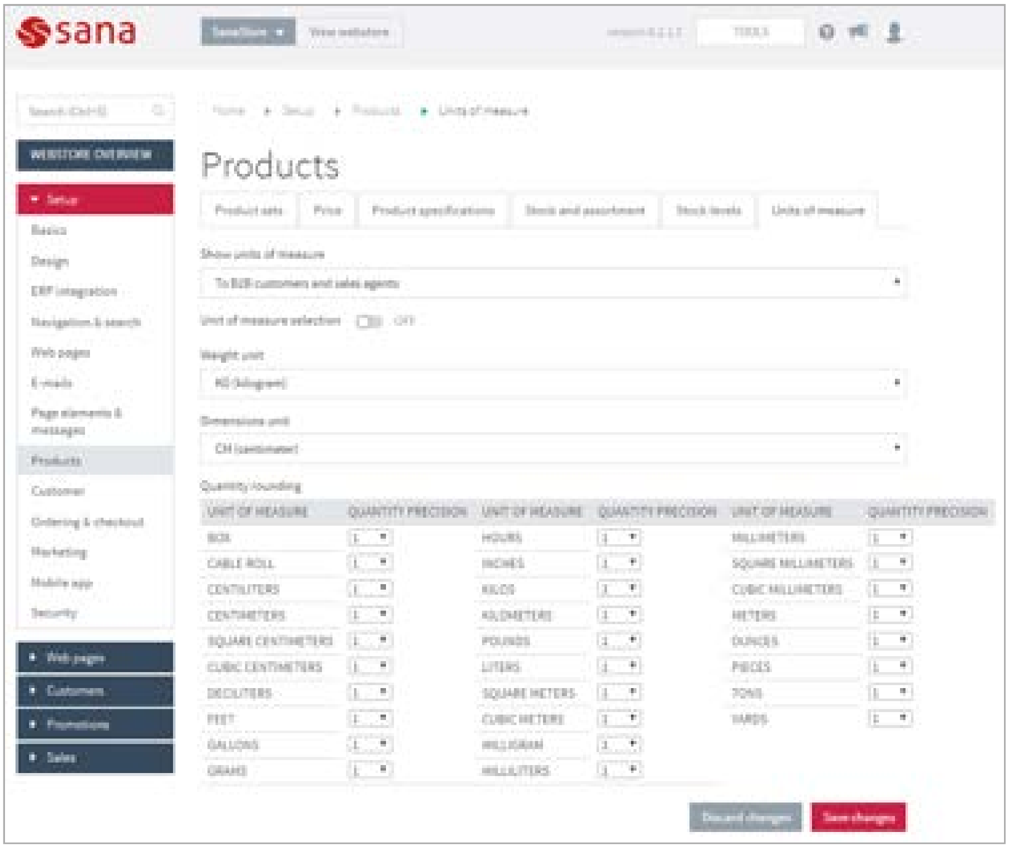
You can do this by setting up **Max. stock number** for product groups/product categories. It will be used for all products assigned to the product group/product category just like stock ranges. For example, 300 units of a product are available in stock, but you want to show stock like this >100 to your customers. If there are less than 100 units of the product available, the actual stock number will be shown. Regardless of stock presentation, your customers will be able to buy products until they are available. This option is only used for stock presentation.

Using **Custom stock texts** in Sana Admin, stock can be presented as an indicator, amount, or as a simple text.

For more information, see "Page Elements & Messages".

Units of measure

In Sana Admin click: **Setup** > **Products** > **Units of measure**.



Sana supports multiple units of measure. In your ERP system you can set up units of measure for each product. In the Sana web store, customers can select the unit of measure for products they buy.

The table below provides the description of the fields and settings on the **Units of measure** tab in Sana Admin.

Field/Setting	Description
Show units of measure	Select customer types that should see units of measure in a web store. You can also hide units of measure from all customers.
Unit of measure selection	Use this setting to allow your customers to select a unit of measure for a product in the web store. Multiple units of measure should be set up in your ERP system for a product. If this setting is disabled only the base (sales) unit of measure will be shown.
Weight unit	Select the unit of mass for all products. This information is needed for the delivery services which require weight and physical dimensions of a package to calculate the shipping costs, for example FedEx or UPS, or the internal

	Sana shipping costs calculation method based on weight.
Dimensions unit	Select the unit of length for all products. This information is needed for the delivery services which require weight and physical dimensions of a package to calculate the shipping costs, for example FedEx or UPS.
Quantity rounding	Use this table to set up quantity rounding for the products per unit of measure. Units of measure listed in this table are retrieved from your ERP system.

See also:

Microsoft Dynamics NAV: Units of Measure

Microsoft Dynamics AX: Units of Measure

Microsoft Dynamics 365 Business Central: Units of Measure

Microsoft Dynamics 365 for Finance and Operations: Units of Measure

Microsoft Dynamics GP: Units of Measure

SAP Business One: Units of Measure

SAP: Units of Measure

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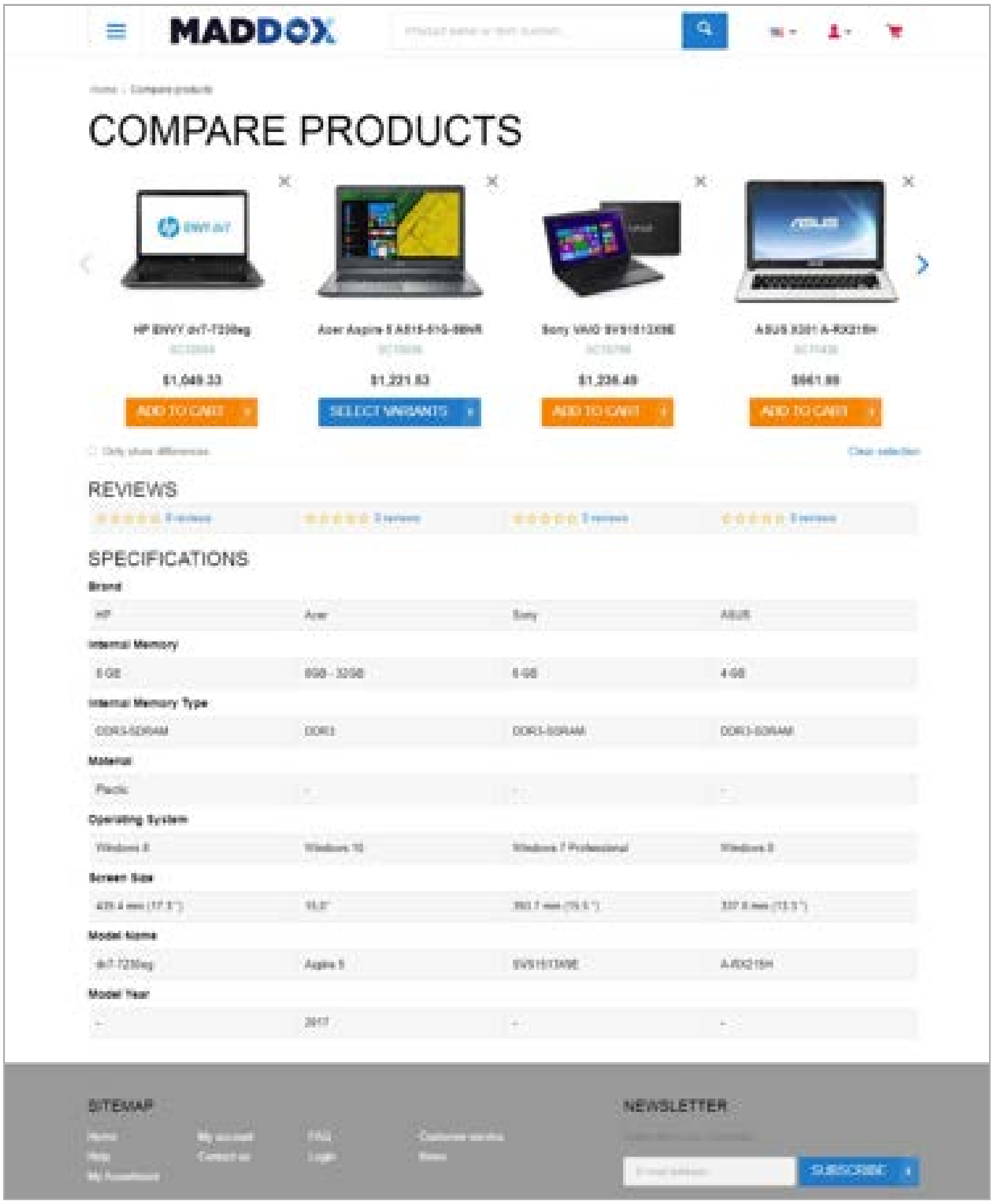
Product Comparison

NOTE

Applies to: Sana 9.3.4 and higher

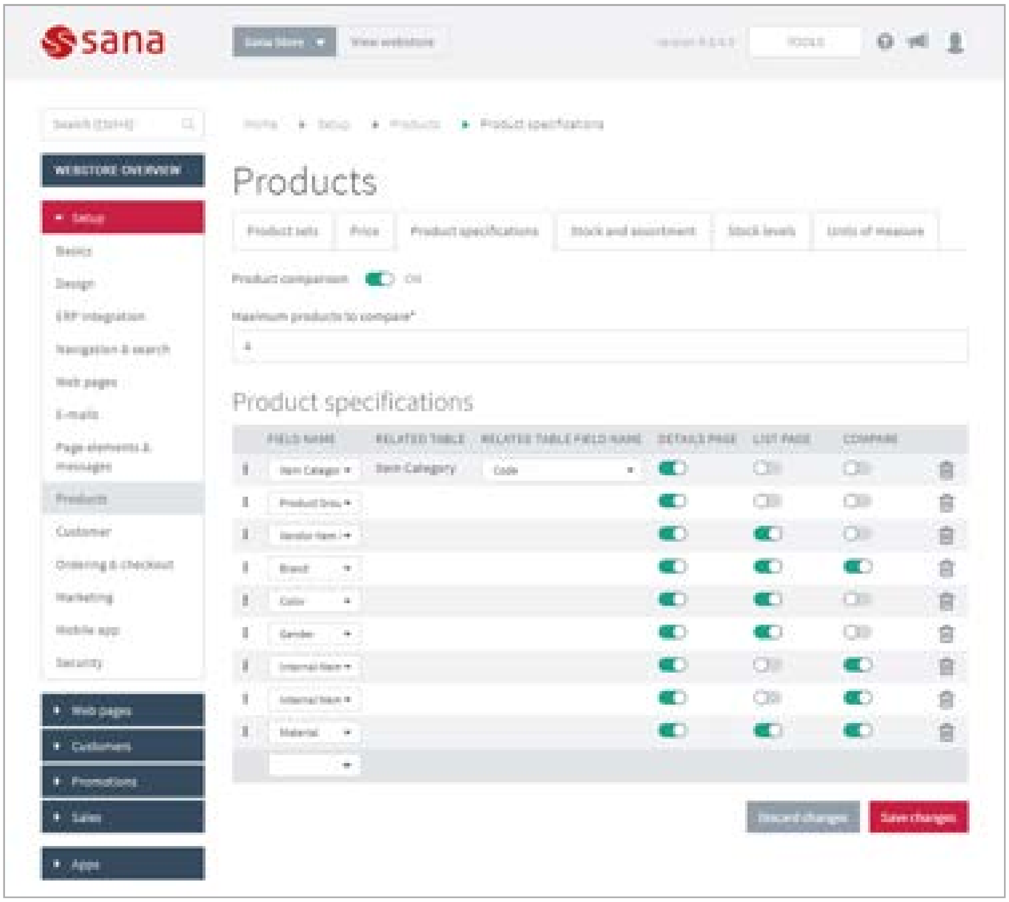
Your web store may store dozens of products which serve similar purpose and come in an extensive range of different features and aspects, that is why it can be hard for a customer to decide for one of them. Not all purchases are the same. Sometimes we buy products really fast, without much effort, for example a T-shirt. However, for some purchases customers can spend hours studying product specifications, rating and reviews, because they play a crucial role. With the product comparison feature provided by Sana, you can make it a lot easier for your customers to choose the right product.

For example, a customer wants to buy a laptop and your web store offers plenty of laptops which differ in size, brand, processor quality, RAM capacity and other specifications. It will be very time consuming and inconvenient for a customer to compare at least several laptops, for example by opening each product in a separate tab in web browser. With the product comparison functionality, a customer can view products side-by-side and see the differences in the table which lists all of the product specifications.



Set up product comparison in Sana Admin

In Sana Admin click: **Setup** > **Products** > **Product specifications**.



Use the **Product comparison** option to allow customers compare products in the Sana web store.

Then, in the **Maximum products to compare** field enter the quantity of products a customer can compare simultaneously. The default value is "10".

Add the necessary fields to **Product specifications**. These fields will be used for product specifications and will be shown on the product details and product list pages in the Sana web store. All fields are retrieved from the ERP system. You can also show or hide each product specification on the product details and product list pages using the toggles in the **Details page** and **List page** columns.

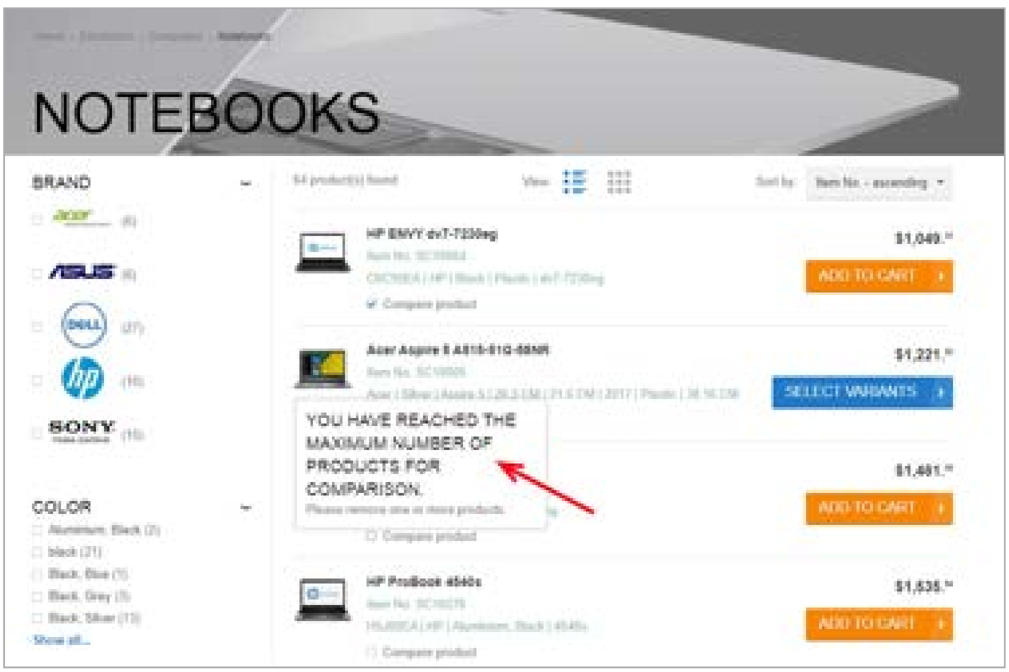
For more information, see "Products".

Use the toggle in the **Compare** column to show or hide a product specification on the **Compare Products** page in the Sana web store. If you do not want to use some specification for product comparison, you can still show it on the product details and product list pages.

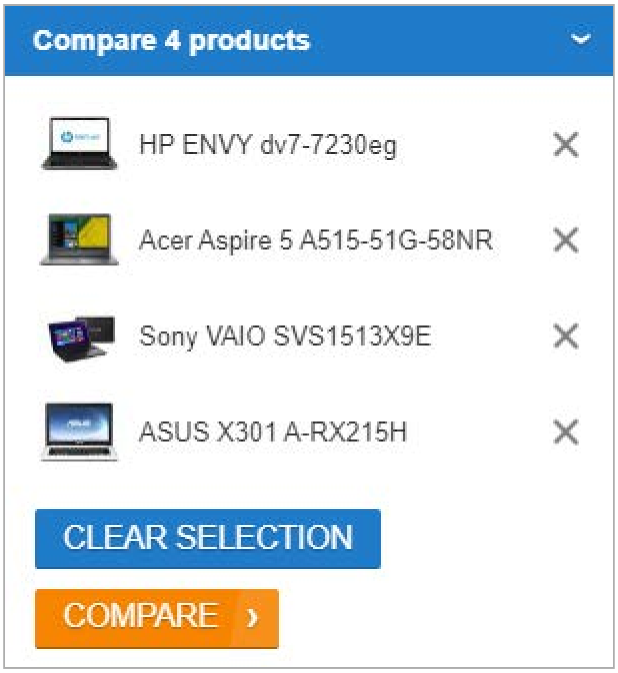
Compare products in the Sana web store

A customer can select products for comparison from the product list, product details, search results and last viewed products pages using the **Compare product** checkbox.

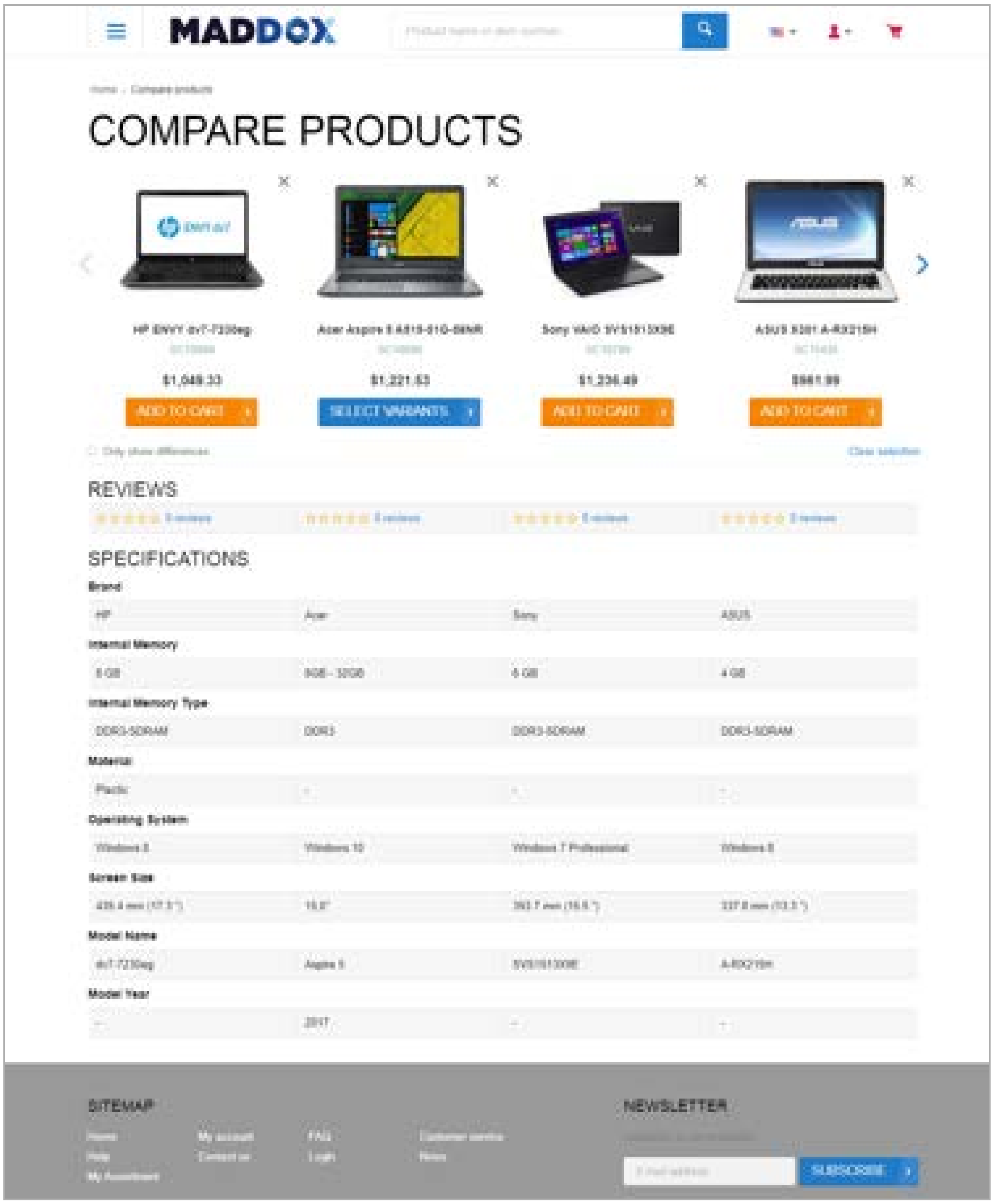
The quantity of products a customer can compare at once is defined by the value set in the field **Maximum products to compare** in Sana Admin. For example, if you enter "4" in this field, then a customer will be able to compare four products or less. If a customer selects more than four products, he or she will see a message which informs that the limit is exceeded.



When a customer selects products for comparison, a small window will appear in the left bottom corner of the web store. A customer can see there the list of products he or she selected for comparison.



To compare the selected products, a customer must click on the **Compare** button.



On the **Compare Products** page a customer can see the products he or she selected for comparison displayed side-by-side. A customer can see price and stock of each product and check rating and reviews. Below the products there is a comparative table which lists specifications of each product.

A customer can also see the difference between the compared product specifications by selecting the checkbox **Only show differences**. Then, the product specifications will be filtered and only those which have different values will be shown. This way customers can easily compare various product specifications and buy the right product.

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Product Comparison

NOTE

Applies to: Sana 9.3.4 and higher

Your web store may store dozens of products which serve similar purpose and come in an extensive range of different features and aspects, that is why it can be hard for a customer to decide for one of them. Not all purchases are the same. Sometimes we buy products really fast, without much effort, for example a T-shirt. However, for some purchases customers can spend hours studying product specifications, rating and reviews, because they play a crucial role. With the product comparison feature provided by Sana, you can make it a lot easier for your customers to choose the right product.

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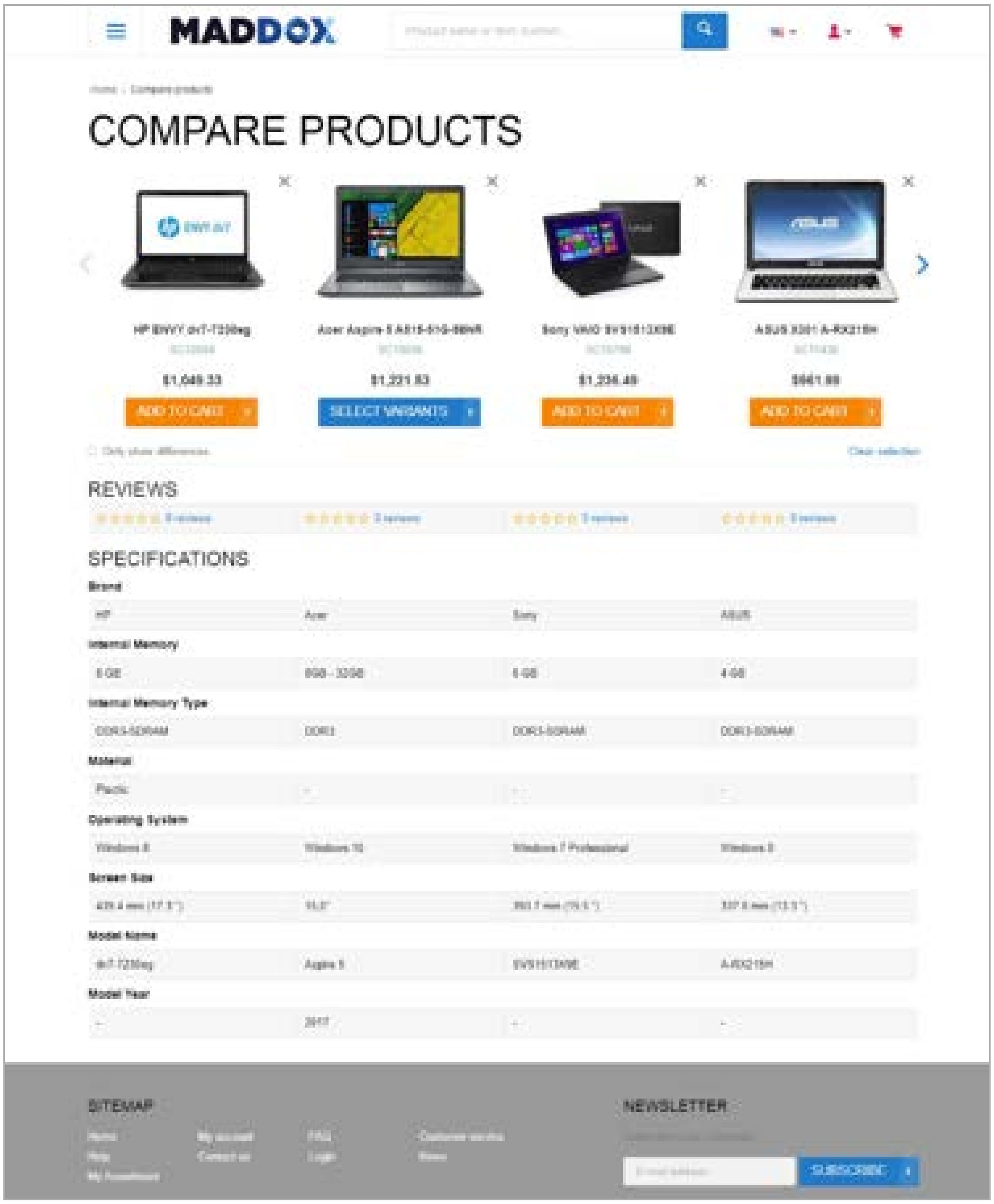
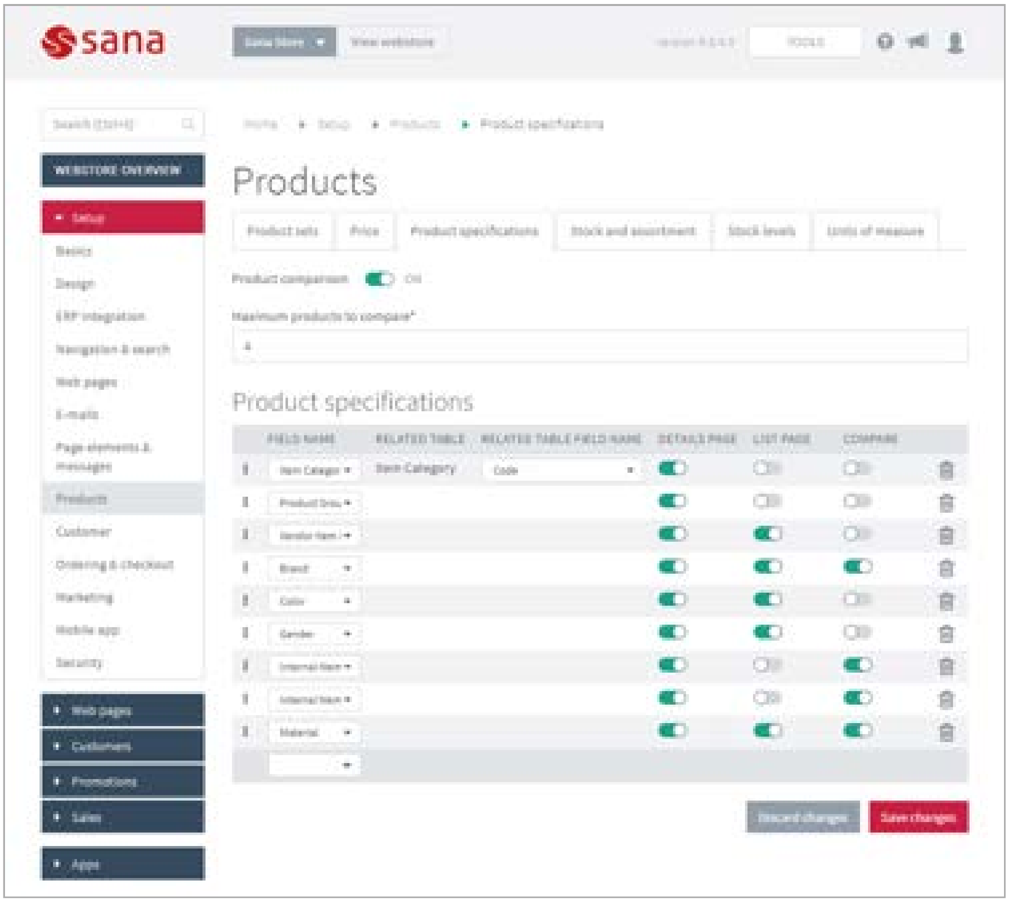


Set up product comparison in Sana Admin

In Sana Admin click: **Setup** > **Products** > **Product specifications**.



Use the **Product comparison** option to allow customers compare products in the Sana web store.

Then, in the **Maximum products to compare** field enter the quantity of products a customer can compare simultaneously. The default value is "10".

Add the necessary fields to **Product specifications**. These fields will be used for product specifications and will be shown on the product details and product list pages in the Sana web store. All fields are retrieved from the ERP system. You can also show or hide each product specification on the product details and product list pages using the toggles in the **Details page** and **List page** columns.

For more information, see "Products".

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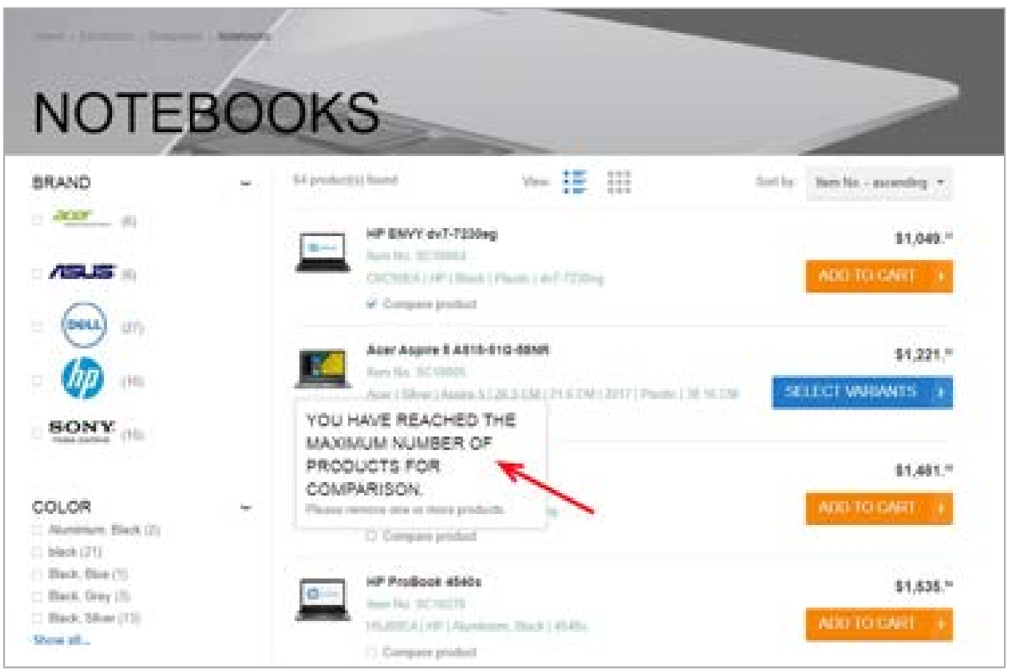

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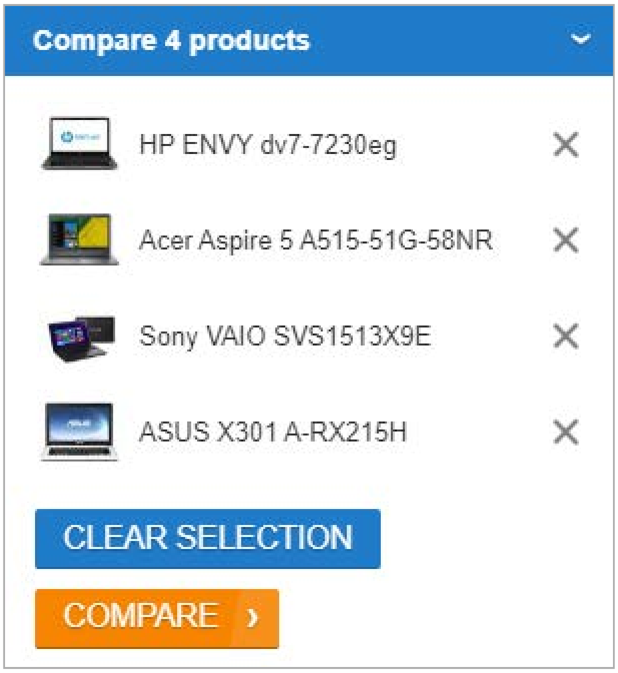

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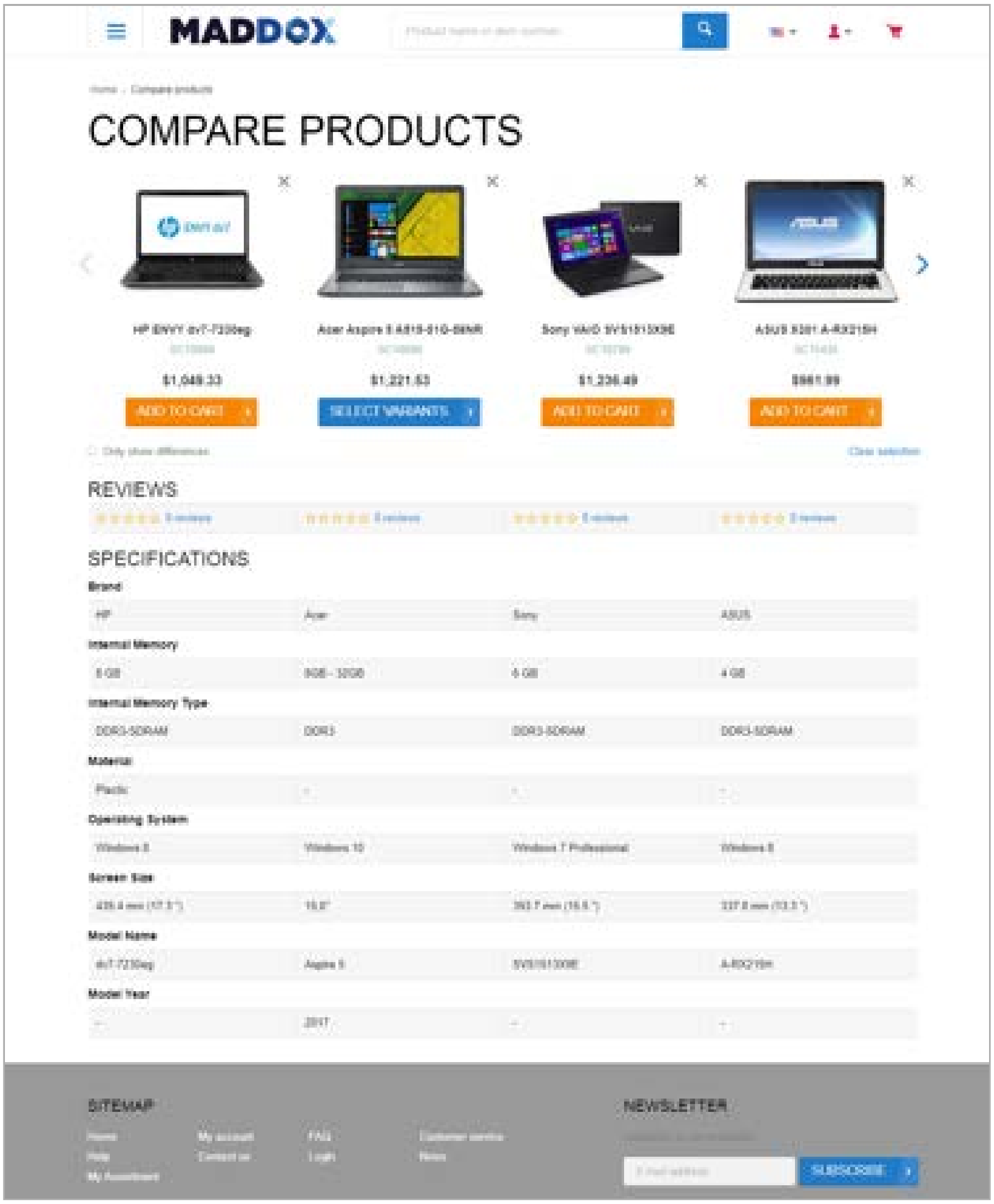

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A customer can also see the difference between the compared product specifications by selecting the checkbox **Only show differences**. Then, the product specifications will be filtered and only those which have different values will be shown. This way customers can easily compare various product specifications and buy the right product.

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Customer

Sana Commerce is available for any type of a webstore, both business-to-business sales portals for business customers and sales agents, and business-to-consumer online retail stores for customers, or a combination of both - a hybrid scenario that servers all customer roles simultaneously.

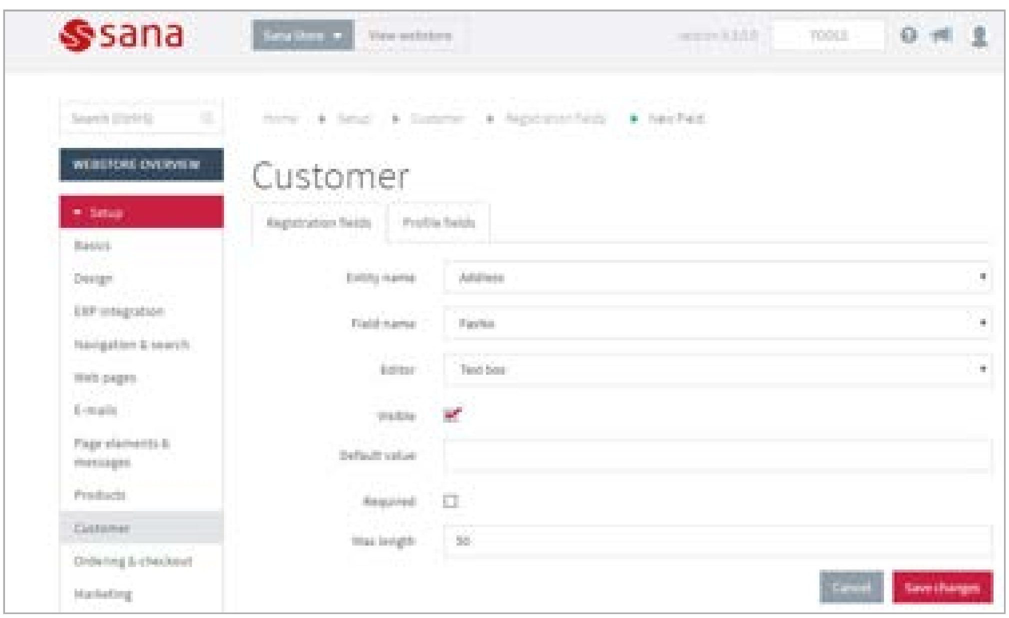
In Sana Admin you can edit the registration form of the customers in the webstore as well as customers' profile forms.

To manage registration and profile forms in Sana Admin click: **Setup** > **Customer**.

Registration fields

Watch the video

Under the **Registration fields** tab use **New customers registration** setting to enable/disable online customers registration in the webstore. If this setting is enable webstore visitors can register in the webstore online. If disabled, only existing in your ERP system customers can log in to the webstore using the shop accounts created in Sana Admin.



Using the table under the **Registration fields** tab you can edit the registration form for those customers that register online in the webstore.

There you can add, edit and remove the fields that are used on the registration form in the webstore.

The table below provides the description of the fields that should be filled in when you add or edit any field of the registration form:

Field	**Description**
Entity name	Two options are available:

	• Address • Customer Depending on the selected entity name different fields are shown in the **Field name** dropdown.
Field name	The fields for customer registration form are retrieved from the ERP system.
Editor	The type of the field. Depending on the selected field different editors can be used: • Text box • Check box • Radio buttons • Dropdown list • Date picker (standard calendar) • Date picker drop-downs (three separate dropdowns for day, month and year)
Visible	This option allows to show/hide the field on the registration form in the webstore.
Default value	In this field you can specify the default field value that will be shown on the registration form in the webstore.
Required	Use this checkbox to define whether the field is required or optional.
MaxLength	In this field you can define how many characters can be entered in the field of the text box type.
Options	Use options to add values and their user-friendly translatable titles for the fields of the dropdown list type.

NOTE

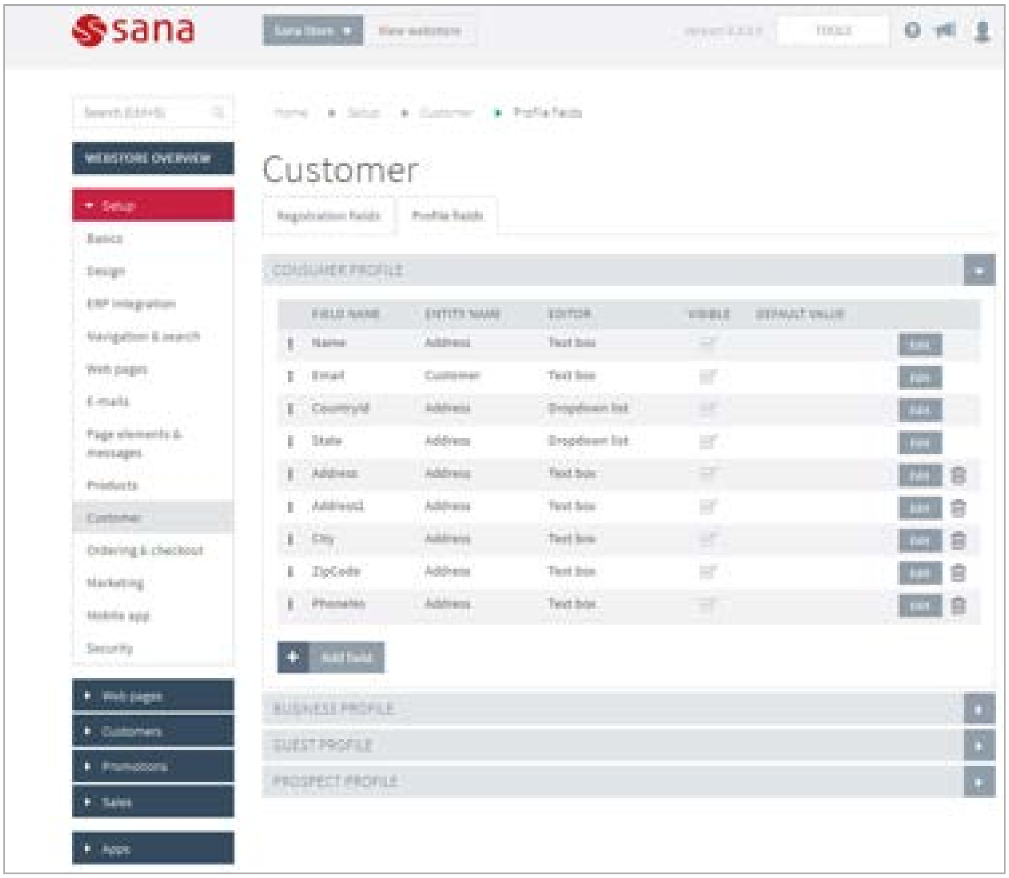
The fields **Name**, **E-mail**, **CountryId**, **State** and Is **B2cCustomer** are the required fields of the registration form and cannot be removed.

The field **Is B2cCustomer** is required, but it is not shown on the customer registration page. When a customer registers in a Sana webstore online, this field is used to save the customer to the ERP system as a B2C customer. The default value of the **Is B2cCustomer** field is set to 'true', which means that all customers who register in a Sana webstore will be saved to ERP as B2C customers.

Profile fields

Watch the video

Under the **Profile fields** tab you can edit a profile form for different types of customers. You can add, edit and remove the fields that are used for the customer's profile form in the webstore. In the webstore consumers and business customers can access their profiles from the **My account** page.



The following profile forms can be edited:

Profile template	Description
Consumer profile	The profile form of the customers who register online in the webstore. A consumer can change his or her personal profile information in the webstore from the My account page.
Business profile	The profile form of the business customers and sales agents. If you are logged in as a sales agent in the webstore, you can see the profile of the represented customer only. By default, all fields of the business customer profile are set to read-only. This means that a business customer cannot change his or her profile from the webstore. If there is a necessity, a webstore administrator can allow editing the profiles of business customers.
Guest profile	The profile form to enter contact information and shipping address when a shopper places an order without registration. For more information, see "Guest Checkout".
Prospect profile	The profile form to create a prospect order. Use the option **Create prospects** to enable/disable prospect orders creation. For more information about prospect orders, see the chapter depending on your ERP system: **Microsoft Dynamics NAV**: Prospects **Microsoft Dynamics AX**: Prospects **Microsoft Dynamics 365 Business Central**: Prospects

	Microsoft Dynamics 365 for Finance and Operations: Prospects **SAP Business One**: Prospects **SAP:** Prospects and Ordering Process

The table below provides the description of the fields that should be filled in when you add or edit any field of the profile:

Field	Description
Entity name	The following two options are available for the **Consumer**, **Business** and **Guest** profiles: • Address • Customer The following two options are available for the **Prospect** profile: • Address • Contact Depending on the selected entity name different fields are shown in the **Field name** dropdown.
Field name	The fields for the profile form are retrieved from your ERP system.
Editor	The type of the field. Depending on the selected field different editors can be used: • Text box • Check box • Radio buttons • Dropdown list • Date picker (standard calendar) • Date picker drop-downs (three separate dropdowns for day, month and year) • Read-only text (If a field is set to read-only, a customer cannot change its value in his or her profile in the webstore. This editor is not available in the **Prospect** profile.)
Visible	This option allows to show/hide the field on the profile form in the webstore.
Default value	In this field you can specify the default field value that will be shown on the profile form in the webstore.
Required	Use this checkbox to define whether the field is required or optional.
MaxLength	In this field you can define how many characters can be entered in the field of the text box type.
Options	Use options to add values and their user-friendly translatable titles for the fields of the dropdown list type.

NOTE

The fields **Name**, **E-mail**, **CountryId** and **State** are the required fields of any profile and cannot be removed.

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Setup

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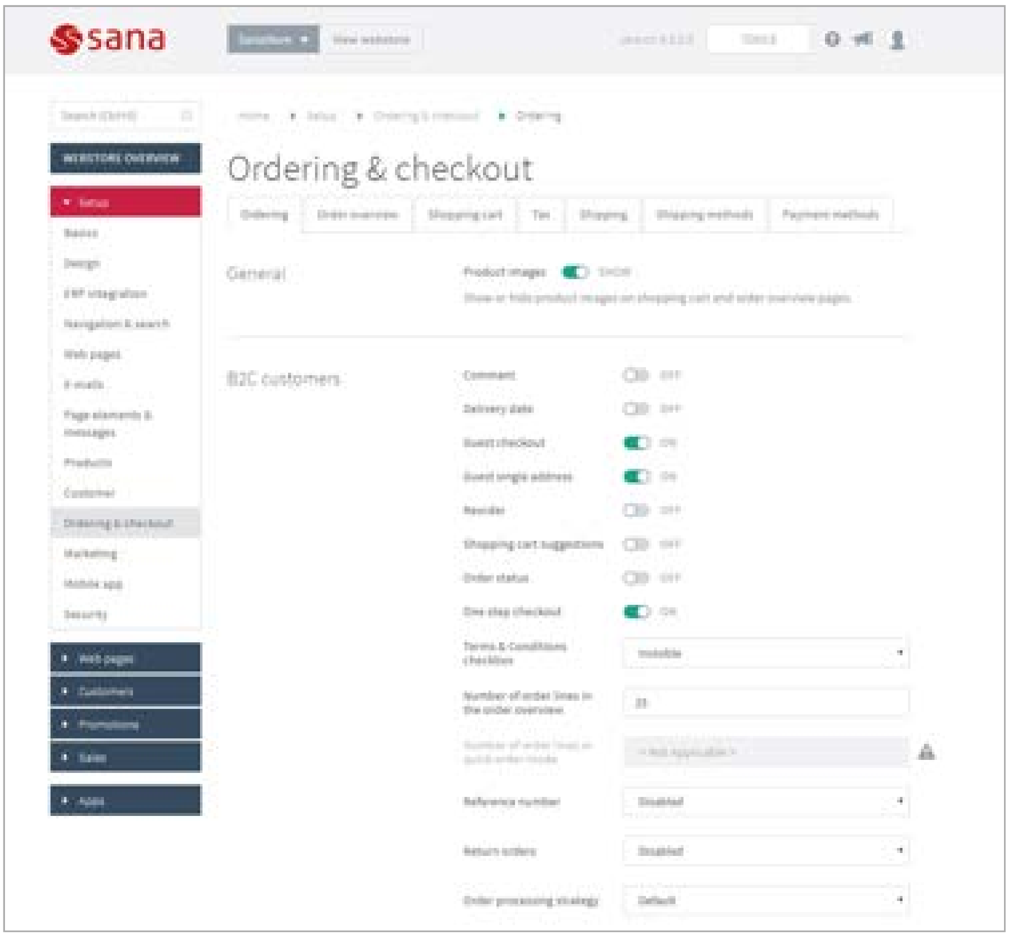
Ordering & Checkout

In Sana Admin click: **Setup** > **Ordering & checkout**.

Ordering

Watch the video

In Sana Admin click: **Setup** > **Ordering & checkout** > **Ordering**.



Set up the ordering settings. These settings will help you to optimize the ordering experience for your customers.

The table below provides the description of the ordering settings.

Option	Description
Product images	Use this option to show or hide product image thumbnails in the shopping cart and on the order overview page.
Comment	Comments are available only to business customers up to **Sana 9.3.1**, starting from **Sana 9.3.2** to all customers.

	Use this option to enable or disable sales order comments for B2C and B2B customers, and sales agents. If this option is enabled, then customers and sales agents will be able to add comments on the last checkout step. When the order is placed, comments will be saved to the sales order in the ERP system. **See also**: **Microsoft Dynamics NAV**: Sales Order Data **Microsoft Dynamics AX**: Sales Order Data **Microsoft Dynamics 365 for Finance and Operations**: Sales Order Data **Microsoft Dynamics GP:** Sales Order Data **SAP Business One**: Sales Order Data **SAP**: Sales Order Data
Delivery date	Delivery date is available only to business customers up to **Sana 9.3.1**, starting from **Sana 9.3.2** to all customers. Use this option to enable or disable delivery date for B2C and B2B customers, and sales agents. If this option is enabled, then customers and sales agents will be able to specify the requested delivery date on the last checkout step. It is saved with the sales order to the ERP system.
Guest checkout	Use the option "**Guest checkout**" to allow or prohibit creating orders without registration. Use the option "**Guest single address**" to control which billing/shipping information a shopper must enter when creating an order. The options "**Guest checkout**" and "**Guest single address**" can be set up only for B2C customers.
Guest single address	If the option "**Guest single address**" is enabled, a shopper will need to enter only one address which will be used both, as a billing address and shipping address. If the option "**Guest single address**" is disabled, shoppers will be able to enter a billing address and a different shipping address. For more information, see "Guest Checkout".
Edit order	YouTube Watch the video Business customers and sales agents can edit sales orders directly in the Sana webstore. Use this option

	to allow or forbid editing sales orders. If this option is enabled, business customers and sales agents will be able to edit existing sales orders from the order history. Business customers and sales agents can edit only those sales orders that are paid on account and are not posted yet in the ERP system. To enable the "on account" payment type for your business customers and sales agents, in Sana Admin click: **Setup** > **Ordering & checkout** > **Ordering**. In the "Online order payments" field for B2B customers, select "**Full amount paid on account**". This option has nothing to do with the "Internal (on account)" payment method. Paying the order using the "Internal (on account)" payment method does not allow editing sales orders. **See also**: **Microsoft Dynamics NAV**: Edit Order **Microsoft Dynamics AX**: Edit Order **Microsoft Dynamics GP**: Edit an Order **Microsoft Dynamics 365 Business Central**: Edit an Order **Microsoft Dynamics 365 for Finance and Operations**: Edit an Order **SAP**: Edit Order
Reorder	Use this option to allow or forbid customers reorder the products which have been purchased before. In case the product is not orderable anymore, a customer will be notified by a message in the shopping cart. If this option is enabled, the **Reorder** button is shown on the order details page in the order history.
Shopping cart suggestions	Use shopping cart suggestions to offer your customers the products which they might be interested to buy. Customers are often loyal to a particular brand or some products which they frequently buy, thus it's a good idea to build suggestions based on the customer's shopping behavior. For more information, see "Shopping Cart Suggestions".
Order status	Use this option to show or hide the order status in the order history.
Sales agreements	Use this option to enable or disable sales agreements. A sales agreement is a contract that commits the customer to buy products in a specific quantity or for a specific amount over time, in exchange for special prices and discounts. For more information, see "Sales Agreements".
One step checkout	Use this option to enable or disable one step checkout for different types of customers. To create an order in a Sana web store, a customer must enter the shipping address, select delivery and payment methods, and check the order details.

	You can use either a multistep checkout or a one step checkout. If this option is enabled, all checkout steps will be shown on a single page. If this option is disabled, all checkout steps will be shown separately. For more information, see "Checkout".
Terms & Conditions checkbox	In **Sana 9.3.0** and **9.3.1**, there is a single option that changes the behavior of Terms & Conditions in the web store. Starting from **Sana 9.3.2**, there is a field with multiple values. Terms and Conditions or Privacy Policy is a set of rules that a user must agree to in order to use your web site. In our case, these are the agreements between you as a web store owner and your customers. When a customer creates an order in a Sana web store, he or she must agree with the terms and conditions on the last checkout step. **Sana 9.3.0 and 9.3.1** By enabling this option, your customers will need to select the "Terms and Conditions" checkbox to agree with the rules and only then finalize the order or disable it to inform the customers that by completing the order, they agree with the terms and conditions automatically. **Sana 9.3.2** The following options are available: • **Invisible** - A customer agrees with the terms and conditions automatically, by completing the order. • **Visible and not selected by default** - A customer has to select the "Terms and Conditions" checkbox to agree with the rules and only after that complete the order. • **Visible and selected by default** - The "Terms and Conditions" checkbox is selected automatically. A customer only needs to complete the order.
Number of order lines in the order overview	In this field, you can enter how many order lines should be shown in the order overview. This is useful for large orders with a big amount of order lines. If the number of order lines exceeds the one set in this field, then the order lines will be collapsed on the **Order overview** checkout step, in the order history, and in the order confirmation e-mail. A customer can expand the order lines to see the details of the order and all available order lines.
Number of order lines in quick order mode	This option applies to B2B customers with the "Business" basket page layout. When a business customer adds products directly on the shopping cart page, he or she cannot see more order lines than it is set in this field. Once a customer recalculates the shopping cart, all other order lines

	will be loaded and shown on the separate pages. A customer can use pagination in the shopping cart to see all order lines.
Reference number	Reference number is available only to business customers up to **Sana 9.3.1**, starting from **Sana 9.3.2** to all customers. As a webstore administrator you can ask your B2C and B2B customers, and sales agents for additional information during checkout, like customer's reference number. You can hide and show the "**Reference no.**" field on the last checkout step. You can also make it optional or required. When the order is placed, the reference number will be saved to the sales order in the ERP system. **See also**: **Microsoft Dynamics NAV**: Sales Order Data **Microsoft Dynamics AX**: Sales Order Data **Microsoft Dynamics 365 Business Central**: Sales Order Data **Microsoft Dynamics 365 for Finance and Operations**: Sales Order Data **Microsoft Dynamics GP:** Sales Order Data **SAP Business One**: Sales Order Data **SAP**: Sales Order Data
Return orders	Use this option to enable or disable return orders for different customer types. Sana delivers an easy and personalized return experience to build trust relationship between shop owners and their customers. The return process is completely automated and integrated with the sales order processing in the ERP system. Sana allows to create return orders based on invoice and those that are not connected to any sales documents. For more information, see "Return Orders".
Online order payments	Use this option to determine how B2B customers must pay their orders. B2B customers can pay on account, online through a payment gateway, and based on prepayment rules. For more information, see "Payments". The payment type "**Amount based on prepayment rules**" is supported only by Microsoft Dynamics NAV and SAP ECC. If your business customers pay their orders on account or based on prepayment rules, you can also set

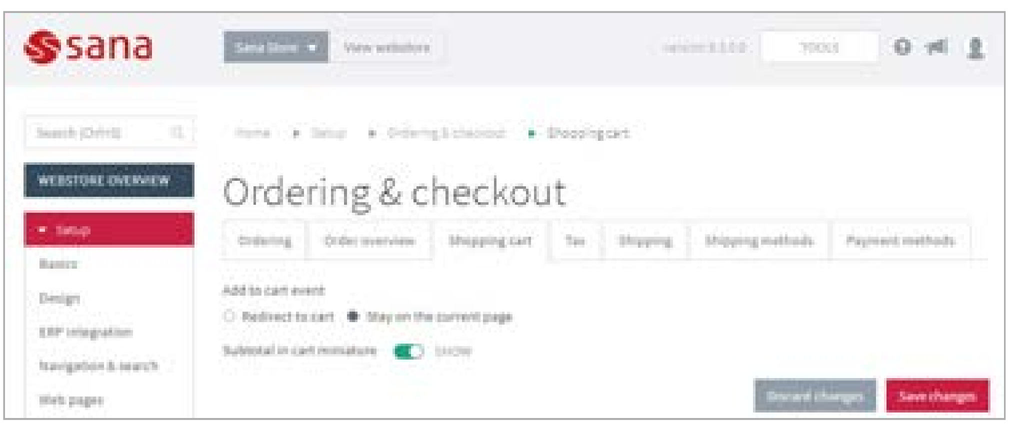
	up credit limits validation. See below. **See also**: **Microsoft Dynamics NAV**: Prepayments **Microsoft Dynamics 365 Business Central**: Prepayments **SAP ECC**: B2B Customer Prepayments
Validate credit limits	As a web store administrator, you can set up credit limits for your business customers in the ERP system. There might be some differences depending on the ERP system you are using and combination of settings "**Online order payments**" and "**Validate credit limits**". Using the option "**Validate credit limits**", you can inform your business customers about exceeding their credit limit. The message is shown in the shopping cart. The following options are available: **Disabled** - When a business customer exceeds his or her credit limit, the warning message will not be shown in the shopping cart. A customer goes through the usual checkout process. If the credit limit is set for the customer in ERP and it is exceeded, it will be still calculated in your ERP system. **Enabled with warning only** - A warning message is shown in the shopping cart, informing a customer that his or her credit limit is exceeded and asking to pay the outstanding invoices. A customer can also see the amount by which he or she exceeds the credit limit. **Enabled with online payment** - A warning message is shown in the shopping cart, informing a customer that his or her credit limit is exceeded and asking to pay full amount online through the payment provider. A customer can also see the amount by which he or she exceeds the credit limit. In some ERP systems you can forbid a customer to place an order, if the credit limit is exceeded. In this case, the error message will be shown in the shopping cart (regardless of the selected option in the field "**Validate credit limits**"), informing a customer that his or her credit limit is exceeded, and a customer will not be able to proceed to checkout. For more information, see "Credit Limits".
Online invoice payments	Using this option, you can allow business customers to pay their open invoices online, either with the automatic payment journal creation in the ERP system or manual. For more information, see "Online Invoice Payments".
Order processing strategy	Use this option to set up the suitable basket calculation mode. For more information, see "Order Processing".

Checkout options	Select the order placement type. It can be either order or quote, or both, giving a customer possibility to choose whether to place an order or a quote. A quote can be also converted to a sales order directly from the Sana web store. Checkout options are not available, if you are using order processing strategy optimized for large orders. For more information, see "Order Processing".
Quote to order conversion	Allow or deny conversion of a sales quote into a sales order directly from the Sana web store. From the Sana web store a quote can be converted into a sales order just with a single click ignoring stock and allowing customers pay on account, or you can lead a customer through the checkout process again to allow changing the shipping address, delivery date, and to complete (online) payment. Quote to order conversion is not supported, if you are using order processing strategy optimized for large orders. For more information, see "Order Processing".

Shopping cart

Watch the video

In Sana Admin click: **Setup** > **Ordering & checkout** > **Shopping cart**.



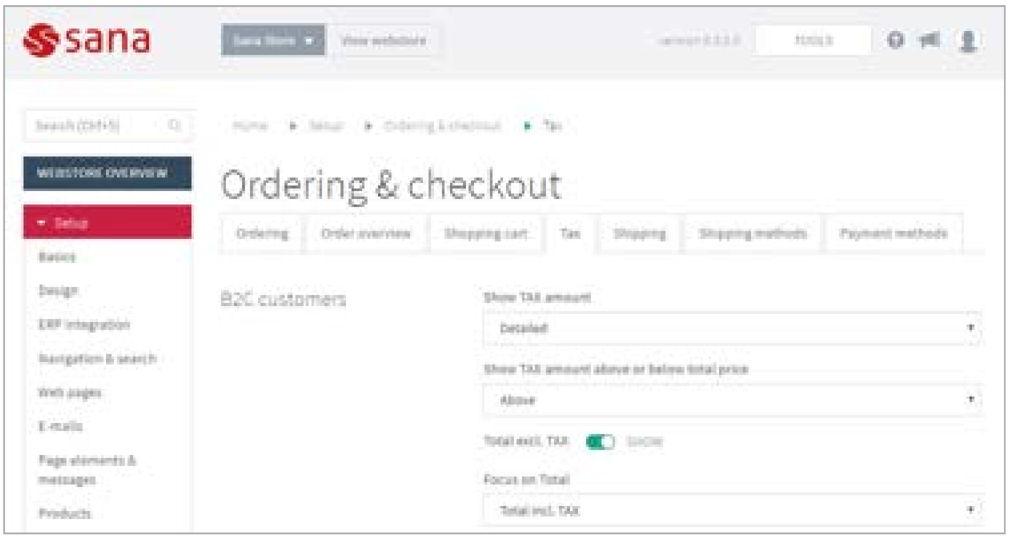
The table below provides the description of the shopping cart settings.

Settings	Description
Add to cart event	Select what should happen when a customer adds a product to the shopping cart in the web store. Two options are available: • Redirect to the shopping cart

	• Stay on the current page
Subtotal in cart miniature	Use this setting to show or hide the subtotal of the order amount in the shopping cart miniature at the top of the web store.

Tax

In Sana Admin click: **Setup** > **Ordering & checkout** > **Tax**.



On the **Tax** tab, you can configure the presentation of taxes in the shopping cart. It can be set up per customer type: B2C customers, B2B customers and sales agents.

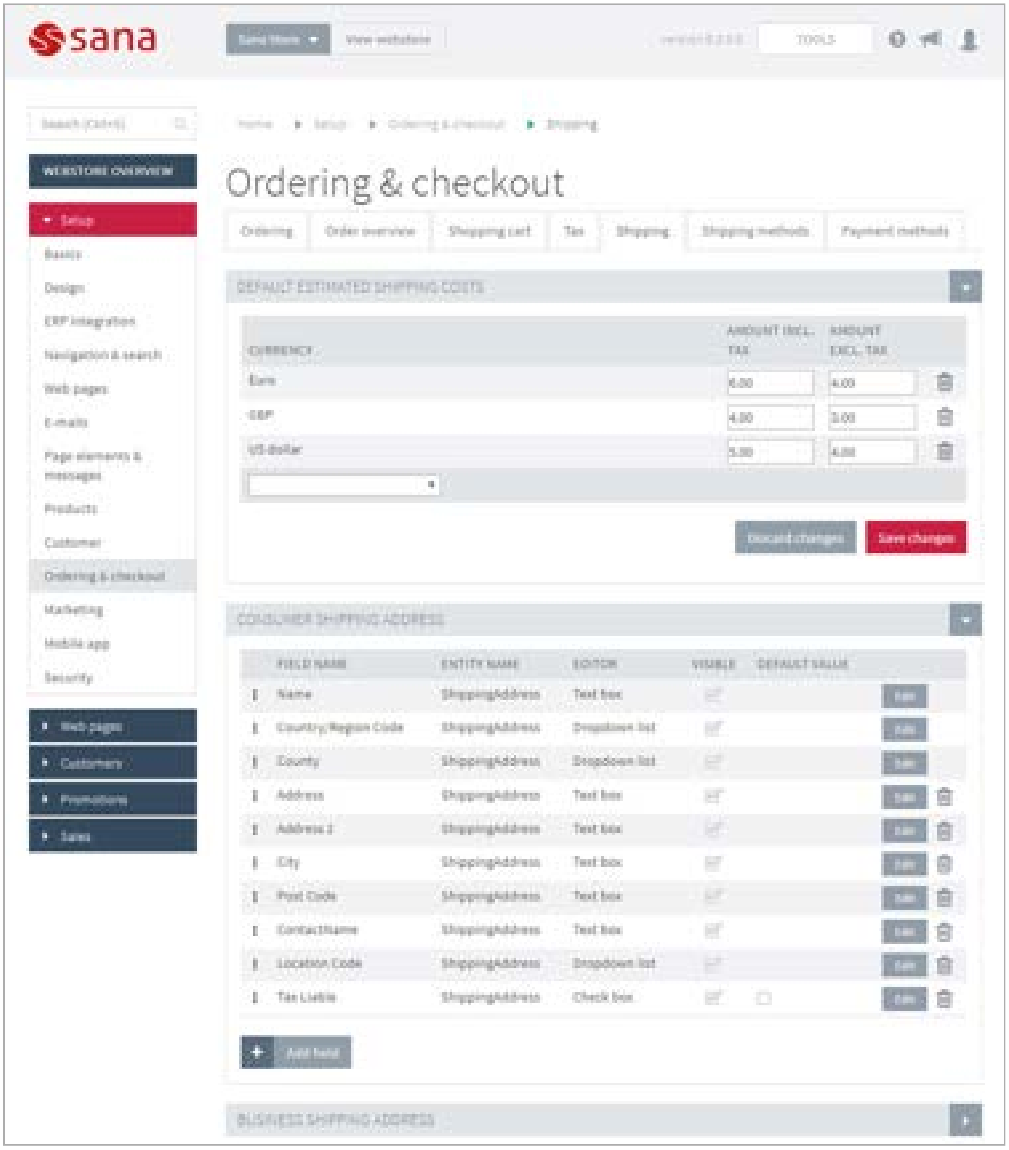
The table below provides the description of the tax settings.

Setting	Description
Show TAX amount	Select whether to show the total TAX amount (**Total**) in the shopping cart or to show multiple tax lines (**Detailed**), or do not show taxes at all (**Do not show**).
Show TAX amount above or below total price	Select whether to show TAX amount above the total price or below in the shopping cart.
Total excl. TAX	Show or hide the total price excluding tax.
Focus on Total	Select whether to make a focus on total price including tax or excluding tax. According to your choice the corresponding price will be shown using the bigger and bold font.

Shipping

Watch the video

In Sana Admin click: **Setup** > **Ordering & checkout** > **Shipping**.



On the **Shipping** tab, you can set up the default estimated shipping costs and configure the fields that should be used in the customer's shipping address.

Set up the default estimated shipping costs

The default estimated shipping cost is shown in the shopping cart of the web store to anonymous users and logged in customers only when shipping methods are not available, because there are no shipping methods that match the shipping cost conditions configured in Sana Admin. In this case the default estimated shipping cost is shown in the shopping cart just to show the approximate shipping cost and inform a customer about the extra charge. This is not a real shipping cost which a customer will need to pay. When a customer gets to the checkout process and selects the appropriate shipping method, the shipping cost will be recalculated.

Step 1: On the **Shipping** tab, expand the **Default estimated shipping costs** area.

Step 2: Enter the default shipping costs per currency - amount including tax and excluding tax.

The list of currencies is retrieved from your ERP system.

When a customer places an order in the web store, the appropriate price is retrieved depending on whether the prices including VAT (sales tax) is enabled or disabled for the customer in your ERP system.

Configure customer's shipping address form

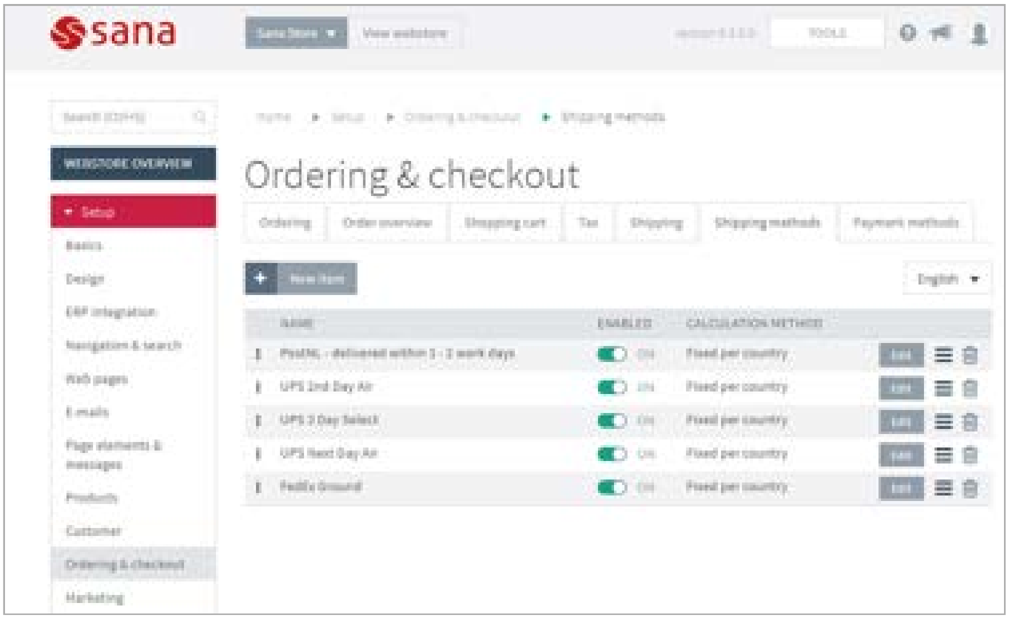
In Sana Admin you can edit the shipping address form for the registered consumers and guests, and for business customers. When a customer places an order in the web store, he or she should specify the shipping address. In Sana Admin you can configure which fields should be shown for the customer's shipping address.

The table below provides the description of the fields that should be configured when you add or edit any field to the customer's shipping address form.

Field	Description
Field name	The fields for the customer's shipping address form are retrieved from your ERP system.
Editor	The type of the field: • Text box • Dropdown list • Read-only text (the field of this type is not editable)
Visible	This option allows to show or hide the field on the customer's shipping address form.
Default value	In this field you can specify the default field value that will be shown on the shipping address form in the web store.
Required	Use this checkbox to define whether the field is required or optional.
MaxLength	In this field you can define how many characters can be entered in the field of the text box type.
Options	Use options to add values for the field of the dropdown list type.

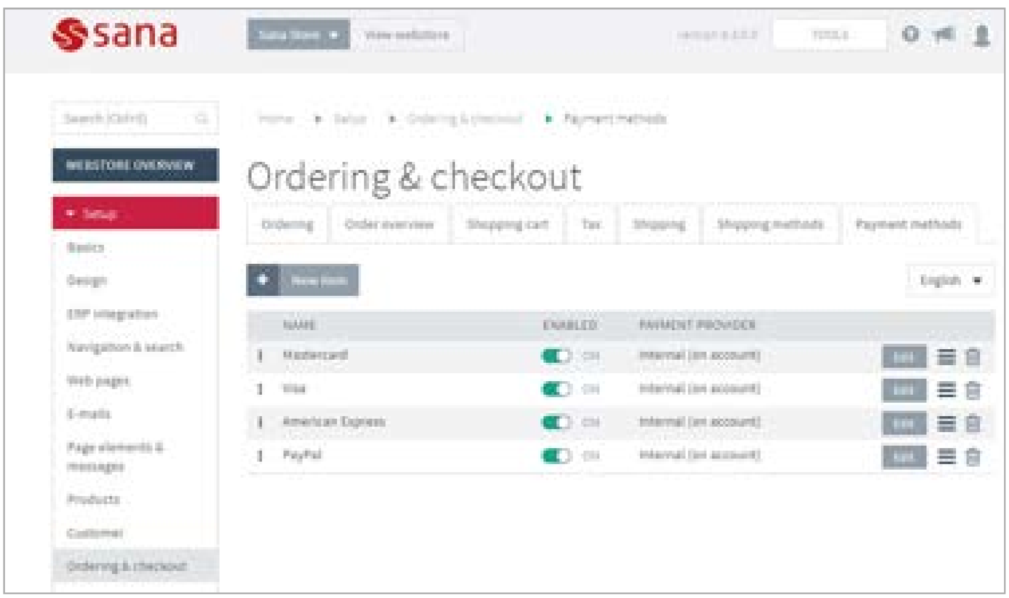
In the **Business shipping address** area, you can also use the option **Allow custom address** to allow or forbid business customers and sales agents enter the shipping address manually during the checkout process. Business customers can have several shipping addresses that are managed in the ERP system, while consumers always enter the shipping address manually.

Shipping methods



On the **Shipping methods** tab, you can create and set up the necessary shipping methods. For more information, see the "Shipping Methods" article.

Payment methods



On the **Payment methods** tab, you can create the necessary payment methods and connect them to your payment provider. For information, see the "Payment Methods" article.

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Setup

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Order Processing

Ordering process is critically important for most businesses. Sales order processing can vary from business to business. In the retail industry there might be one sales process, while in the complex manufacturing business there might be multiple layers and approval process involved. For some businesses order approval workflow is essential. It is used to enforce the business rules of a company to ensure that all orders are within budget.

Sana complies with any individual business process flow. Placement of the quotes, orders, or quotes with a possibility to convert them into sales orders - all business scenarios are supported by Sana.

To configure the ordering process, in Sana Admin click: **Setup** > **Ordering & checkout** > **Ordering**. The settings of the ordering flow can be set up per customer type.

This article provides detailed information about order processing strategies and order placement types supported by Sana.

Field	Description
Order processing strategy	Use this option to set up the suitable basket calculation mode: • Default • Optimize for fast ordering • Optimize for large orders Below you can read about order processing strategies in details.
Checkout options	Select the order placement type. It can be either **order** or **quote**, or both, giving a customer possibility to choose whether to place an order or a quote. A quote can be also converted to a sales order directly from the Sana web store. The final sales document that will be created should be set up in the ERP system. Below you can read about different sales documents in details.

Quote to order conversion	Allow or deny conversion of a sales quote into a sales order directly from the Sana web store. In the Sana web store, a quote can be converted into a sales order just with a single click ignoring stock and allowing customer pay on account, or you can lead a customer through the checkout process again to allow changing the shipping address, delivery date and to complete (online) payment. Below you can read about quote to order conversion in details.

NOTE

To configure the ordering flow for the Sana web store, you must also set up the order processing settings in your ERP system:

- **Microsoft Dynamics NAV**: Order Processing
- **Microsoft Dynamics AX**: Order Processing
- **Microsoft Dynamics 365 Business Central**: Order Processing
- **Microsoft Dynamics 365 for Finance and Operations**: Order Processing
- **Microsoft Dynamics GP**: Order Processing
- **SAP Business One**: Order Processing
- **SAP ERP**: Order Processing

Order processing strategies

Sana provides three order processing strategies:

- **Default**
- **Optimize for fast ordering**
- **Optimize for large orders**

These are the basket calculation modes, meaning different approaches on how the basket can be calculated.

Default

The default order processing strategy performs real-time basket calculation, triggering all available business logic in your ERP system.

Optimize for fast ordering

NOTE

We recommend this order processing strategy only if you are using a very basic price logic in your ERP system - only product prices (base and sales) that do not change frequently, and no customer-specific charges and invoice discounts, volume prices, multi-line discounts, etc. Otherwise, you should better use the "Default" order processing strategy.

This order processing strategy uses a similar basket calculation method as in the maintenance mode. When the order processing strategy that is optimized for fast ordering is used, the ERP system does not participate in basket calculation. The basket is calculated based on the base and sales prices of a product. Customer-specific charges and invoice discounts, multi-line discounts, volume prices, taxes, sales agreements and retail offers are not used to calculate basket. If some product taxes are indexed by Sana, they will be also calculated in the shopping cart, but not customer-specific.

Only when a customer submits an order, it will be recalculated in the ERP system, and the customer will receive the order confirmation e-mail with the order details. If there is any customer-specific invoice discount, service charge or tax, they will be calculated and applied to the sales order. Keep in mind, that when the order is recalculated by ERP and if you use a complex price logic, you may encounter some issues with saving the order to ERP, for example, if the total order amount calculated in the shopping cart does not match the final total amount when the order is recalculated by ERP. Therefore, you should consider using the "Default" order processing strategy.

This order processing strategy allows to quickly place even very big orders with a lot of lines as it does not require specific business logic to be triggered in ERP during basket calculation. Business customers who need to quickly place a lot of orders or even very big orders without triggering all business logic of the ERP system during basket calculation will certainly benefit from this order processing strategy.

Optimize for large orders

> **NOTE**
>
> This order processing strategy is available only to **B2B customers** and **sales agents**.

This order processing strategy allows placing large orders, for example an order that consists of more than 100 order lines.

When this order processing strategy is used, an empty order is created in ERP at the moment a customer logs in the web store. Each time when a customer adds an item to the basket, removes items or edits the basket, the related order is updated and recalculated in the ERP system, triggering all business logic available in ERP. Customer specific prices, discounts, taxes, service charges are used and shown during basket calculation in real-time.

This order processing strategy is available to business customers that require the ability to create and process very large orders still using business logic of the ERP system at full.

If you use order processing strategy that is optimized for large orders, you must also select the **synchronized basket type** for your web store in the ERP system. It can be either quote or order (also the journal document type is available in Microsoft Dynamics AX). The synchronized basket type is the sales document which is used during the checkout process for large orders.

Limitations of the order processing strategy that is optimized for large orders

This article describes some limitations that you might need to know if you are going to use the order processing strategy that is optimized for large orders.

This order processing strategy is not supported in:

- Microsoft Dynamics AX 2012 for Retail
- LS Retail for Microsoft Dynamics NAV

- SAP Business One

If you are connected to the ERP system that does not support the order processing strategy that is optimized for large orders, this feature will not be available in Sana Admin.

The following features are not supported, if you use the order processing strategy that is optimized for large orders:

- Sales agreements

Sales agreements work with the **Default order processing strategy** only.

- Quote to order conversion

When you select the order processing strategy that is optimized for large orders, the fields "**Checkout options**" and "**Quote to order conversion**" will disappear. That is because the order processing strategy optimized for large orders uses a different logic, and you cannot allow your customers to choose whether to create an order or a quote, and to convert created quotes to orders. Which sales documents will be used depends on the Sana add-on setup in your ERP system.

- Edit order

Business customers are not able to edit orders if order processing strategy is set to "**Optimize for large orders**". In this case, the "**Edit**" button is not available on the order details page in the web store.

- Mix and match discounts

- Extended texts in Microsoft Dynamics NAV and Microsoft Dynamics 365 Business Central that are used to add some extra information under order lines in the shopping basket.

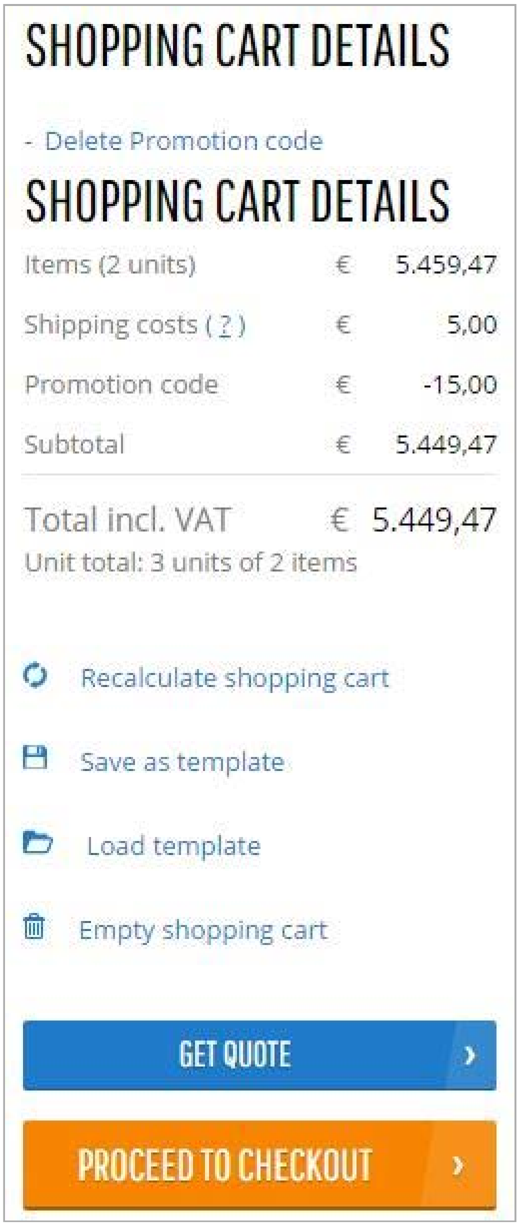
Extended texts are added to the shopping cart as separate lines which substantially affect performance in case of large orders. To achieve acceptable performance with large orders the extended texts functionality was disabled for this order processing strategy.

Checkout options

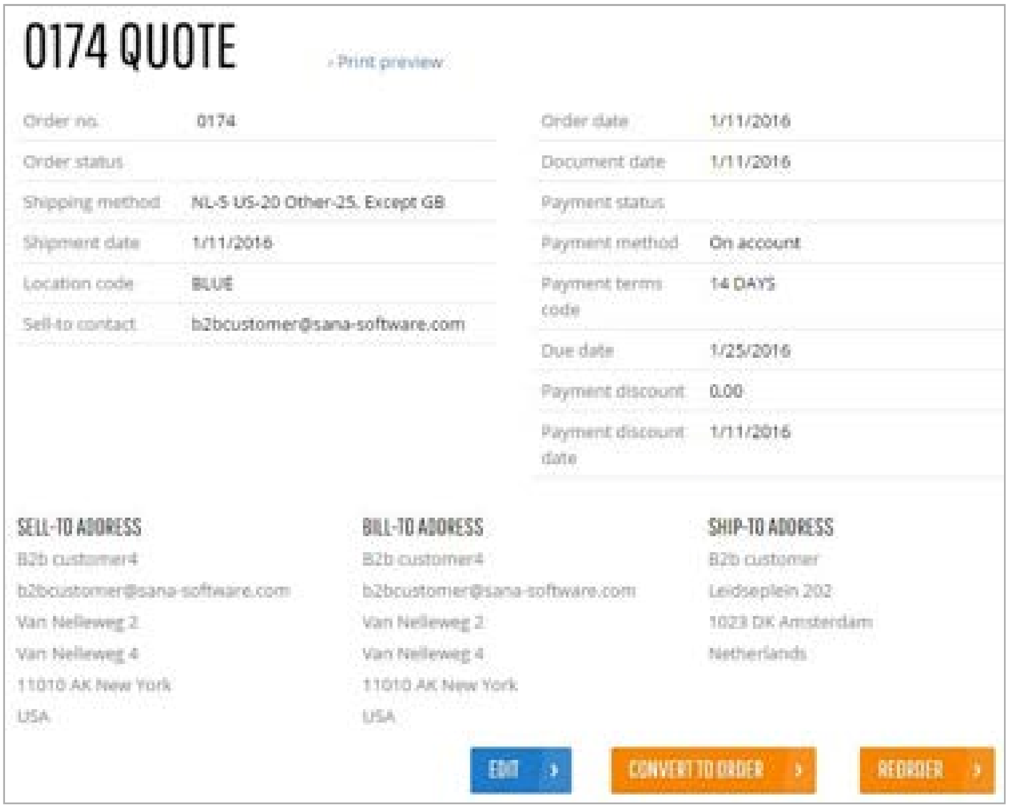
Customers can create different sales documents in a Sana web store:

- **Place orders**
- **Request quotes**
- **Place orders and request quotes**

In the Sana web store, a customer can either create a quote or place an order, or you can give a choice to a customer, whether to place a quote or order.



If a customer creates a quote, he or she can convert it to a sales order directly from the Sana web store on the quote details page.



Quote to order conversion

Three options are available:

- **Disabled**
- **With checkout**
- **Unattended**

Using this option, you can manage quote to order conversion process - either disable it or choose one of the conversion types.

Using the quote to order conversion **With checkout**, a customer will go through the checkout process again and will be able to change the shipping address, delivery date and to complete (online) payment.

If **Unattended** conversion type is used, then during the quote to order conversion, the checkout process will be skipped, stock levels will not be taken into consideration, and a preselected shipping address will be used. The order will be paid on account, if this payment method is used; otherwise it will be left unpaid.

Using the option **Quote promotable by default** in the ERP system, you can allow customers to convert quotes into orders only when a quote is approved by the sales manager in the ERP system. If this option is enabled in ERP, a customer can convert a quote into a sales order without approval. If it is disabled, a customer will be able to convert a quote into a sales order only when it is checked and approved by the sales manager in ERP.

Limitations

- It is impossible to convert quotes into orders if the Retail functionality is enabled for Microsoft Dynamics AX.
- There is one limitation in the quote to order conversion process with checkout. Imagine the following scenario: a customer created a quote and wants to convert it into a sales order. Before converting the quote into the sales order, the sales manager wants to apply

some discount for this order directly in the ERP system. In this case, when a customer converts the quote into the sales order in the web store and goes through the checkout process, the discount will not be applied. Any discounts set globally for a customer or product will be applied. If the sales manager sets some discount on a quote directly in the ERP system, it can be applied only when the business customer pays online or based on prepayment rules and converts the quote into the sales order using the unattended conversion type.

NOTE

If a customer edits a quote in the Sana web store which has been already approved by the sales manager in the ERP system, a customer will be able to convert this quote to the order only after it is approved again. This means that editing the approved quote requires a sales manager to approve this quote again in the ERP system, and only after it the customer will be able to convert this quote to the order.

In case the **Quote promotable by default** option is enabled for the Sana web store in the ERP system, a customer can edit and convert quotes without approval.

It is not required to approve the quote again, if it has been changed by a sales agent.

In the ERP system, quotes have an expiration date. If the quote is not processed within the expiration period, it will expire, meaning that a customer will not be able to convert it into a sales order.

If availability of products depends on stock and a customer converts a quote into a sales order, in case some products are not available a customer will see a notification.

NOTE

The final sales document (order or quote) that will be created in the ERP system depends on what is set in the **Order type** field for the web store in the ERP system. The only scenario which is not supported is conversion of the sales order into the quote as it is not possible in the ERP system.

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Checkout

Watch the video

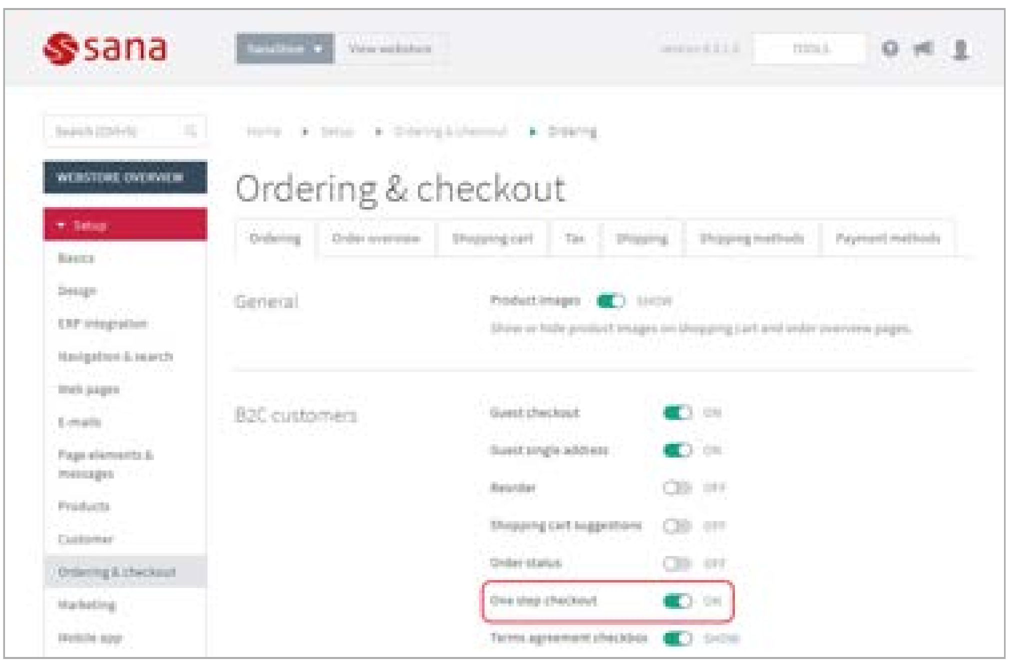
One of the key elements of the online shopping experience is the checkout process. The checkout represents a fully customizable path that the customers need to go through to purchase products offered in your web store. It guides customers through several steps, like shipping information, delivery and payment methods, and order review.

The checkout is often the most complicated part of placing an order online and it is the most critical area of a web store. Thus, an optimized and easy to use checkout process is vital to achieving successful sales on an online store.

Sana supports two checkout scenarios - multistep and one step, so you can go with the one which suits better the needs of your business.

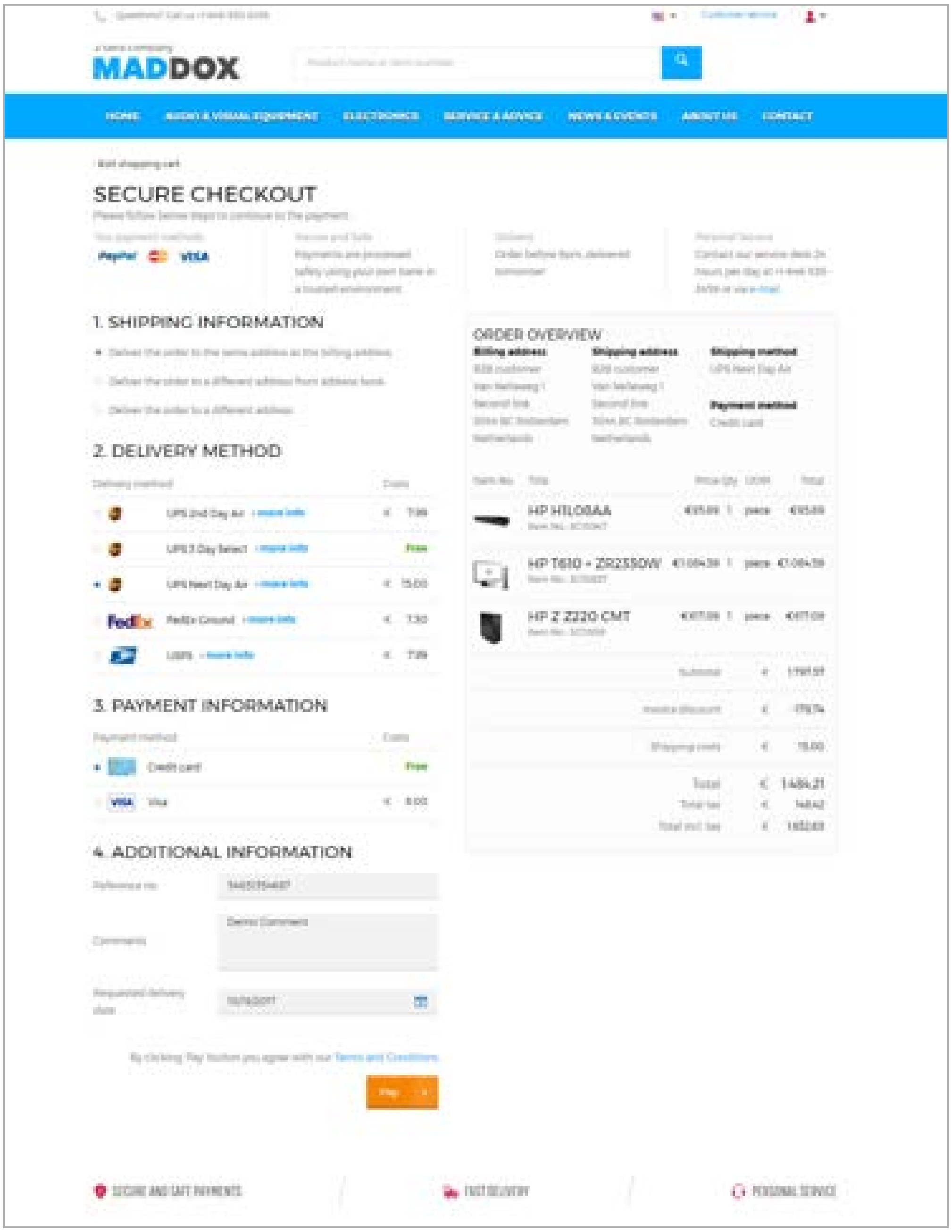
You can control which type of checkout should be used in the web store form Sana Admin. In Sana Admin, click: **Setup** > **Ordering & checkout** > **Ordering**.

Use the option "**One step checkout**" to enable or disable one step checkout for different types of customers.



One Step Checkout

If the option "**One step checkout**" is enabled, all checkout steps will be shown on a single page.



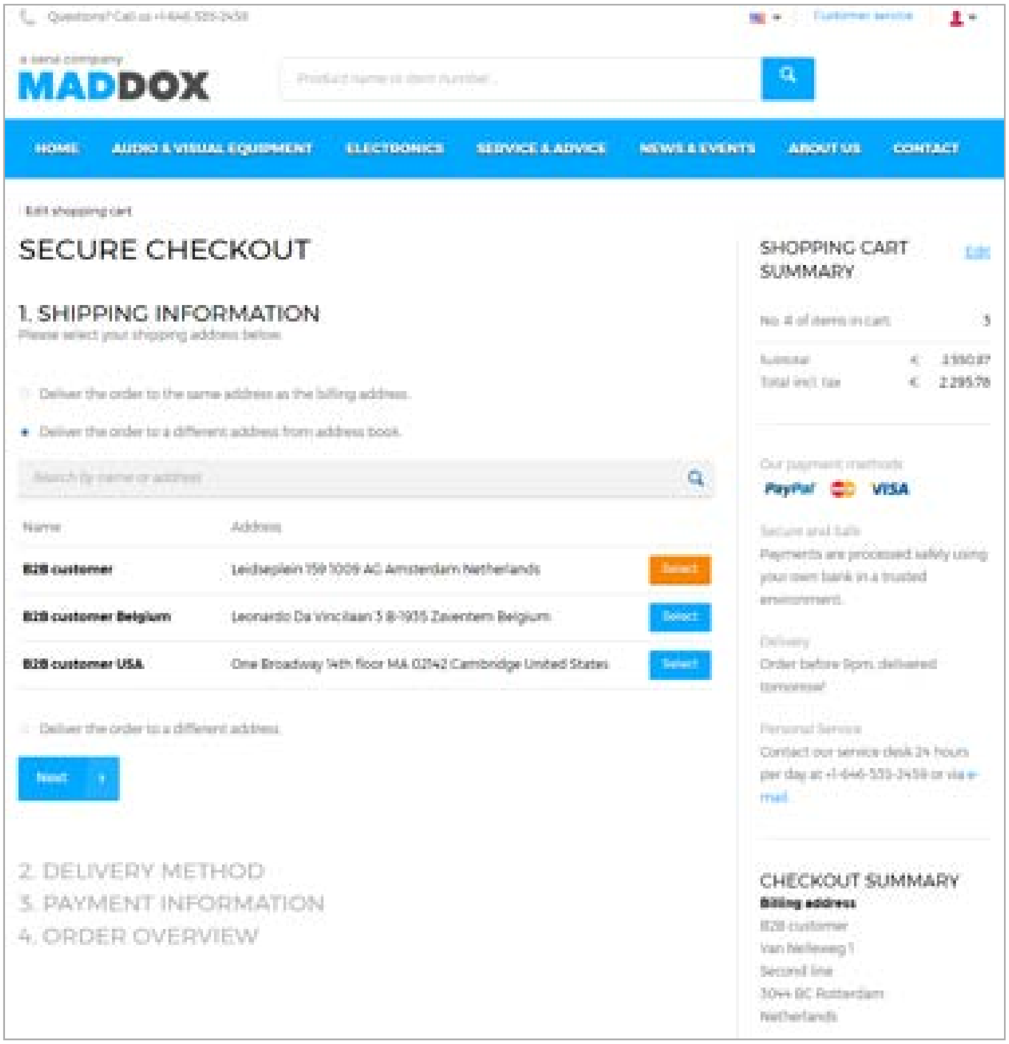
The aim of the one step checkout, as opposed to the multistep checkout, is to get the customer through the checkout process as simply and quickly as possible and, as a result, to reduce customer abandonment and to increase online sales conversion. Customers can see all checkout information right away and can fill in or edit any step without going back and forth, which makes online ordering as simple as possible.

One step checkout supports all ordering features, like shipping information, delivery and payment methods, order overview, guest checkout, creation of different sales document types (quotes and orders), quote to order conversion. It is fully responsive and perfectly works on all types of mobile devices.

You can also add any text to the top and the bottom of the one step checkout page using the In-site Editor. This might be useful, if you want to inform your customers about delivery and payment methods available in your web store, for example. By default, the demo texts are used. Thus, you must change them. You can also delete these texts using the In-site Editor, in case you do not need them.

Multistep Checkout

If the option "**One step checkout**" is disabled, all checkout steps will be shown separately.



Multistep checkout might be beneficial to those customers, especially business customers, who usually create more complex and very large orders.

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Guest Checkout

Watch the video

Guest checkout refers to the ability for shoppers to place an order without registration and logging in to the web store. Guest checkout might be a better option if:

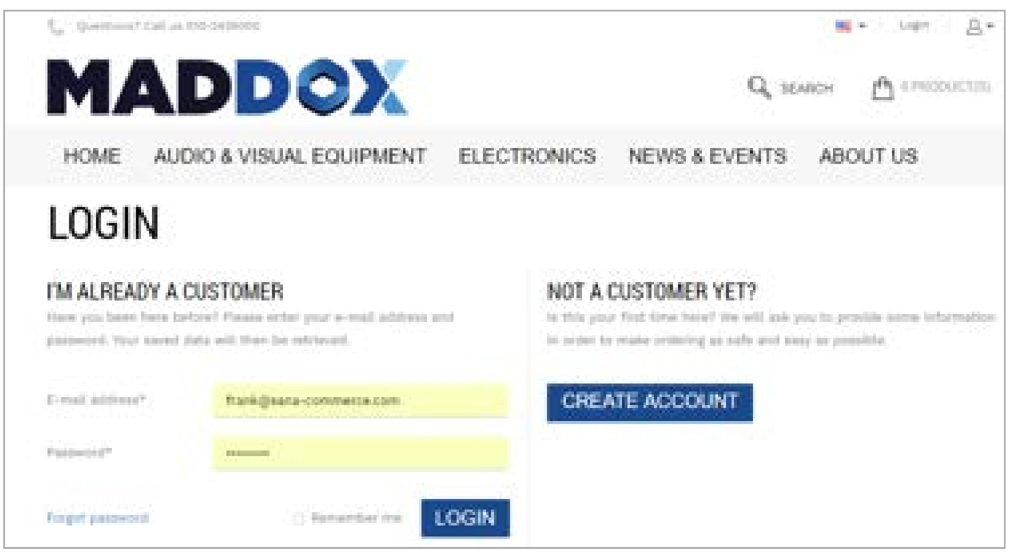
- You are in a rush and you don't have time for registration.
- This is the first time you are using this web store and you don't have plans to buy anything from it ever again.

Shoppers who are placing orders without registration have almost the same shopping experience as B2C customers.

Guest checkout vs. customer checkout

1. Guests can place only sales orders, but not quotes.
2. Guests don't have shop accounts.
3. Guests cannot see their order history as they don't have an account.
4. Guests cannot use the features which require to be logged in to the web store, like wish list, reordering, shopping cart suggestions.

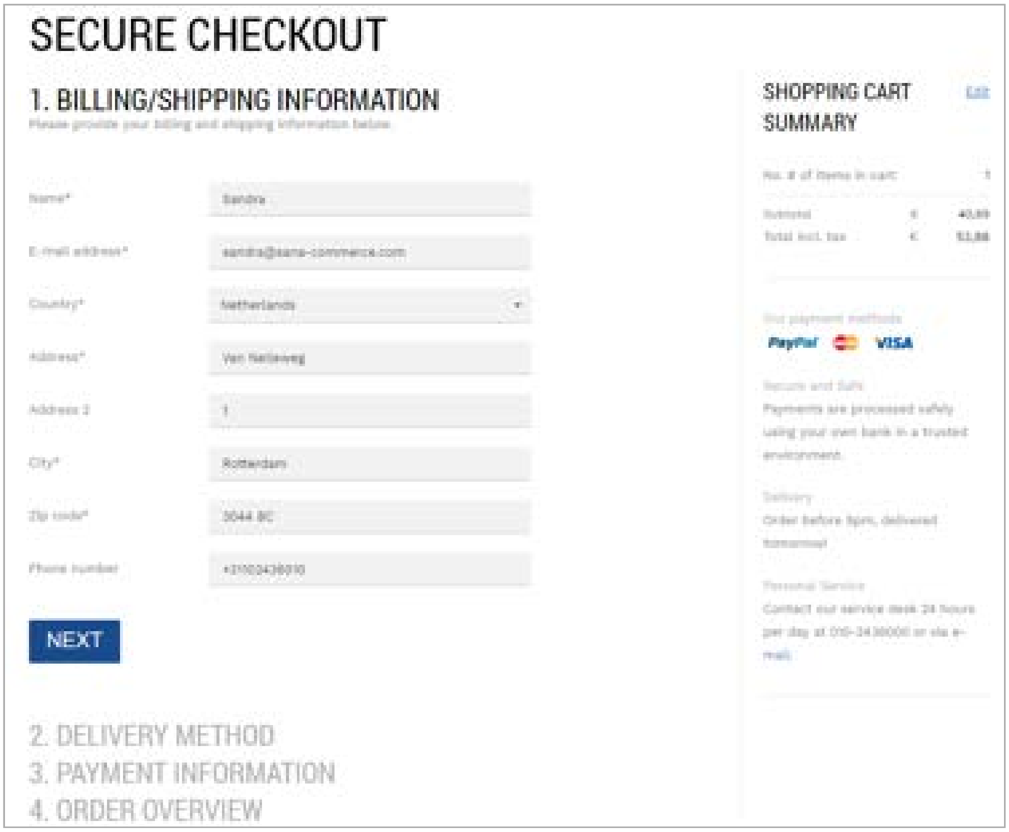
A shopper can add products to the basket, proceed to checkout, and place an order without registration by clicking **Guest checkout** on the **Login** page. The **Guest checkout** button is shown only when there is at least one product in the shopping cart.



On the first checkout step, a guest needs to enter his or her address. This can be one address, which will be used as a billing address and shipping address, or a guest can enter different billing and shipping addresses. Billing information is required.

You can control which billing/shipping information a shopper must enter when creating an order. You can allow shoppers to enter only one address which will be used both, as a billing address and shipping address, and you can also allow shoppers to enter a billing address and a different shipping address.

In Sana Admin, click: **Setup** > **Ordering & checkout** > **Ordering**. Use the option "**Guest single address**" to set up which address information a shopper must enter.



Then, a guest can select the delivery and payment methods, and pay the order.

While browsing the catalog and in the shopping cart, all prices are shown to a shopper in the currency of the template customer assigned to the web store in the ERP system. Once the billing and shipping information is entered, the customer will be created in the ERP system based on the customer template assigned to the country selected by a guest. The currency will be copied from the template customer to the newly created guest customer account. Thus, on all other steps of the checkout process, in the order details and in the order confirmation e-mail, the prices will be shown in the currency which is copied from the customer template assigned to the country.

When the order is placed, it will be stored in the ERP system. The shopper will receive the order confirmation e-mail based on the **Guest Order Confirmation** e-mail template. The customer is created in the ERP system based on the entered contact information and customer template assigned to the country of the shopper in the ERP system.

The shopper's billing information is also stored in the Web browser cookies for three days. This means, that if a shopper comes back to the web store within the next three days to place another order, his or her billing information will be predefined with the one entered earlier, and the same customer in ERP will be used. The shopper's billing information will be automatically removed in three days, or if a user clears the cookies from the Web browser history. The billing information will not be present also, if the shopper uses another Web browser to place an order next time.

When a shopper creates an order without registration, his or her e-mail will be checked in the ERP system. If there is a customer account of the guest type with the same e-mail address, the new guest customer will not be created in ERP, but the existing one will be used instead. This prevents creation of a large number of identical users and minimizes unnecessary data.

The shopper can also decide to become a customer by registering in the web store.

Set up guest checkout in Sana Admin

Step 1: Configure web store type and online customer registration. Guest checkout is available only when the **Store type** is set to **Public store** and **New customer registration** is enabled.

To configure store type, click: **Setup** > **Basics** > **Store information**.

To configure online customer registration, click: **Setup** > **Customer** > **Registration fields**.

Step 2: Click: **Setup** > **Ordering & checkout** > **Ordering**. Enable the option **Guest checkout** for **B2C customers**.

Step 3: Use the option "**Guest single address**" to set up which address information a shopper must enter. If it is enabled, a shopper must enter one address, which will be used as a billing address and shipping address. If it is disabled, a shopper can enter one address or different billing and shipping addresses.

Step 4: Click: **Setup** > **Customer** > **Profile fields**. Set up **Guest profile** fields which are shown in the web store on the **Billing/shipping information** step, where a shopper needs to enter his or her billing information.

Step 5: Click: **Setup** > **Ordering & checkout** > **Shipping** > **Consumer shipping address**. Set up the fields of the consumer shipping address which are shown in the web store on the **Billing/shipping information** step, where a shopper can enter his or her custom shipping address.

For more information, see "Profile fields".

Step 6: If necessary, you can modify the **Guest Order Confirmation** e-mail template, which is used to send order confirmation e-mails to shoppers who place orders without registration. To check the e-mail template, in Sana Admin, click: **Setup** > **E-mails**.

For more information, see "E-mails".

Set up guest checkout in ERP

Step 1: Check whether the countries are configured in your ERP system. The list of countries available on the Billing/shipping information checkout step is retrieved from ERP. Once the billing and shipping information is entered, the customer will be created in the ERP system based on the customer template assigned to the selected by a guest country.

Step 2: In the web store settings in your ERP system you can define the customer ID format which should be used for the guest customer accounts in ERP. By setting up the ID format for the guest customer accounts, a user in ERP can easily differentiate real customer accounts and those which are created as guests.

For more information about guest customer account IDs in ERP, see:

- Numbering in Microsoft Dynamics NAV
- Number Sequences in Microsoft Dynamics AX
- Numbering in Microsoft Dynamics 365 Business Central
- Number Sequences in Microsoft Dynamics 365 for Finance and Operations
- Numbering in Microsoft Dynamics GP
- Number Series in SAP Business One

- Number Ranges in SAP ERP

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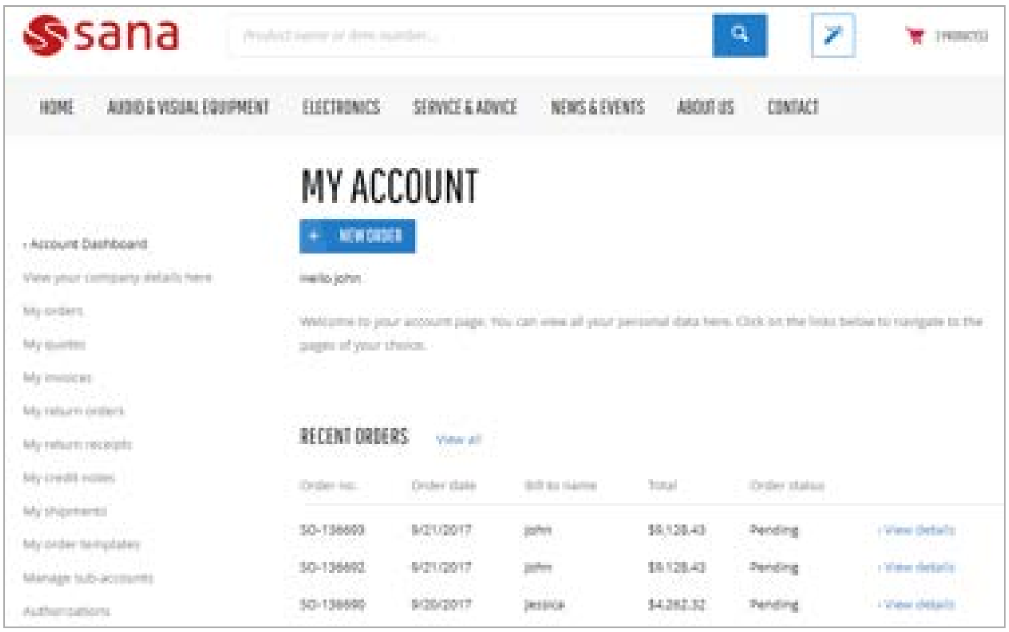
Order History

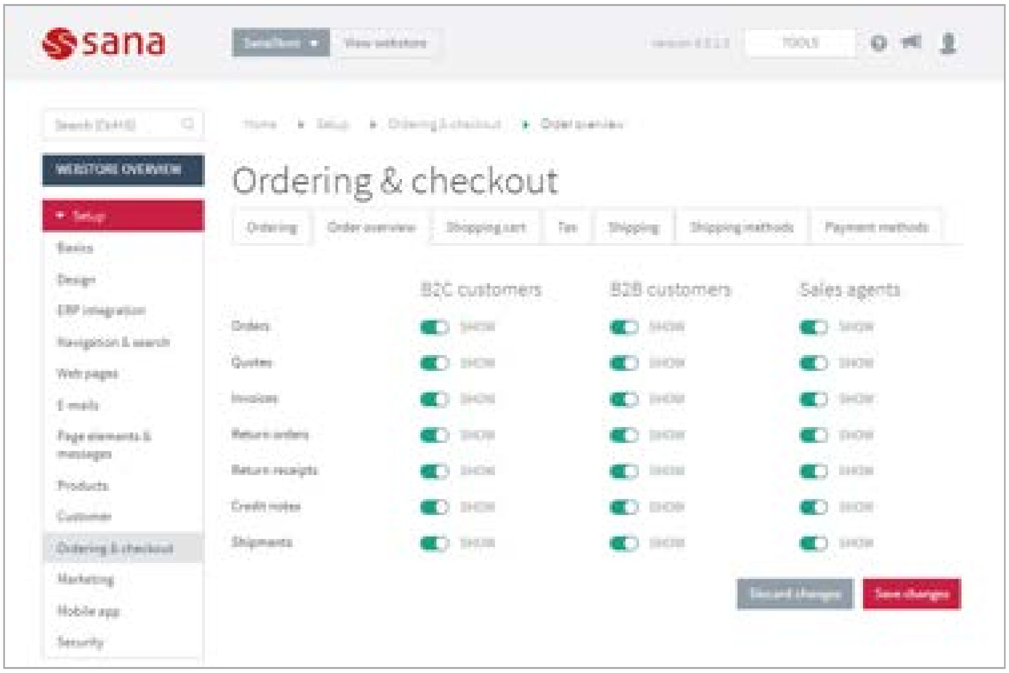
Watch the video

ERP systems have a variety of sales documents which are used in sales order processing. Sana being the ERP integrated e-commerce solution stores customers' orders in the ERP system. Customers can access their accounts online using a Sana web store for a complete overview of their order history, including invoices and shipments. A customer can check his or her order history from the **My account** page, search for a specific sales document by its number and filter by date.



As a web store administrator, you can decide which sales documents must be available to your customers. You can show and hide different sales documents for each customer type. For example, you might want to show invoices to your business customers, but not to consumers. If your ERP system does not support some sales document type, you can simply disable it in Sana.

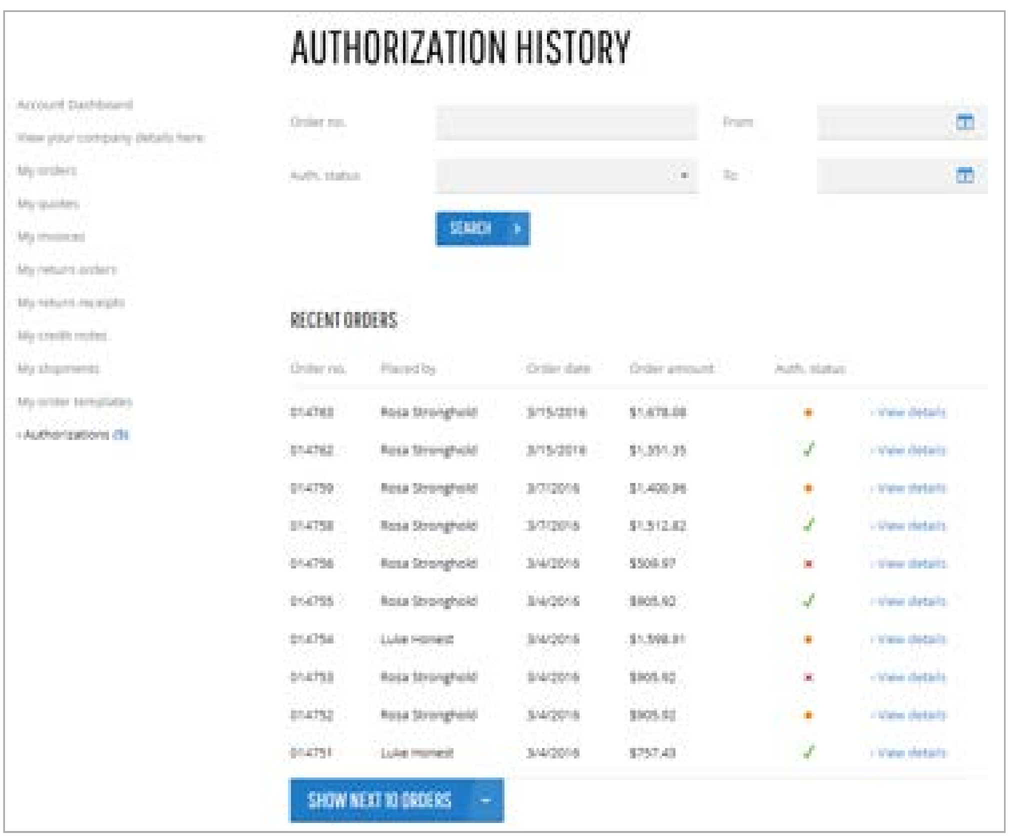
To manage sales documents visibility, in Sana Admin click: **Setup** > **Ordering & checkout** > **Order overview**.



Sales agents can also see different sales documents and their details just like customers. When a sales agent does not represent any business customer, he or she can see all orders placed on behalf of all assigned customers. When a sales agent represents a customer, only sales orders placed on behalf of this customer are shown.

Sana Commerce delivers support of different shop account roles and authorization procedure to meet your individual business requirements and convert the manual process of orders approval into fast and efficient automated process.

Those customers who are set as authorizers, meaning that they can approve and decline orders placed by other sub-accounts, have additional order history page, called **Authorization history**.



On the **Authorization history** page, the authorizers can see all approved, declined and pending orders placed by the associated sub-accounts. From this page an authorizer can see how many orders still need to be approved, and approve or decline pending orders.

For more information about authorization procedure, see "Shop Account Roles".

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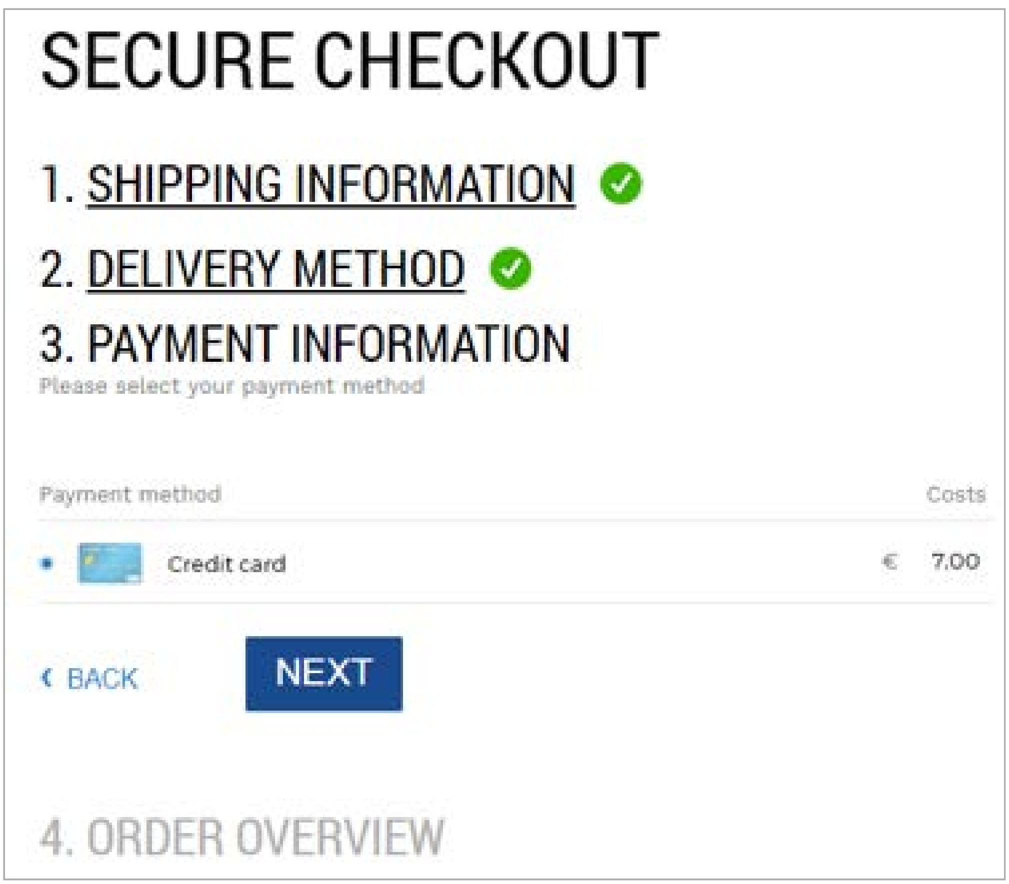
Online Invoice Payments

Watch the video Watch the video

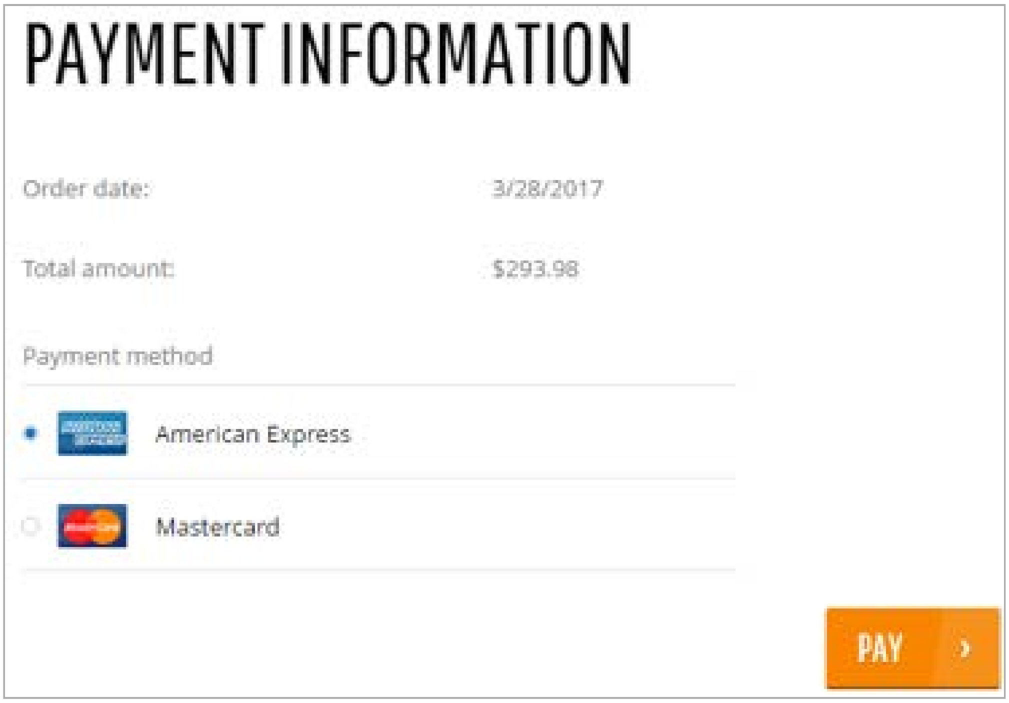
Merchants can accept online payments on open invoices directly from a Sana web store. Business customers can pay multiple outstanding invoices at the same time from a Sana web store. Online payments of the open invoices from a Sana web store are seamlessly integrated with the sales order processing and cash management modules of the ERP system. Paying invoices online saves time and decreases the likelihood of human error by your account payable representatives. This allows to accept credit card payments and have the transactions follow through with the orders to your ERP system.

There are two options on how business customers can pay their orders online:

- A business customer can pay the order while placing it. In this case the payment journal is not created in the ERP system and an accountant should handle this manually.



- A business customer can pay one or multiple open invoices. In this case online order payments for business customers should be set to 'on account', and when a business customer pays the invoice, the payment journal will be automatically created in the ERP system. There is also an option to create payment journals in ERP manually, if there is a necessity.

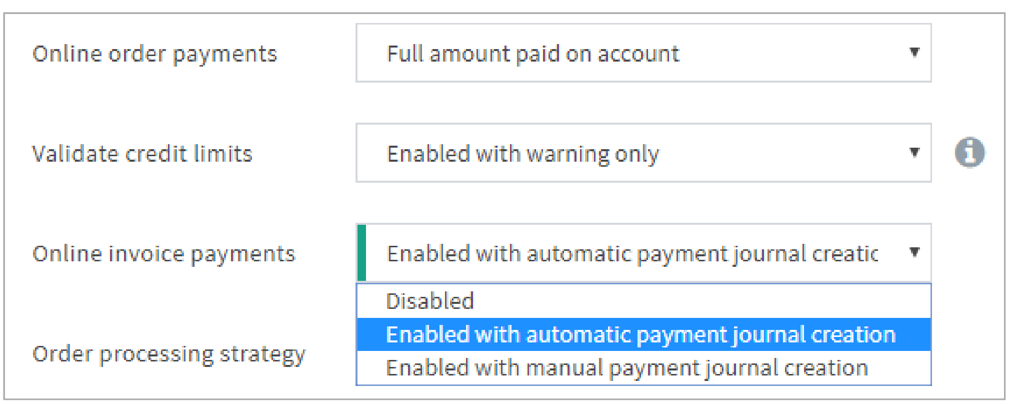


If you want Sana to create payment journals automatically in your ERP system, the payment account should be set for a web store in ERP.

For more information about payment journals in different ERP systems, see:

- Online Invoice Payments in Microsoft Dynamics NAV
- Online Invoice Payments in Microsoft Dynamics AX
- Online Invoice Payments in Microsoft Dynamics GP
- Online Invoice Payments in Microsoft Dynamics 365 for Finance and Operations
- Online Invoice Payments in Microsoft Dynamics 365 Business Central
- Online Invoice Payments in SAP Business One
- Invoice Payments in SAP ECC

Log in to Sana Admin and click: **Setup** > **Ordering & checkout** > **Ordering**. See the option "**Online invoice payments**" for B2B customers. Using this option, you can disable online invoice payments, allow to pay invoices online, either with automatic payment journal creation in the ERP system or manual. There might be the case that you do not want payment journals to be created automatically in your ERP system by Sana, for example if you use some other approach in creating payment journals.

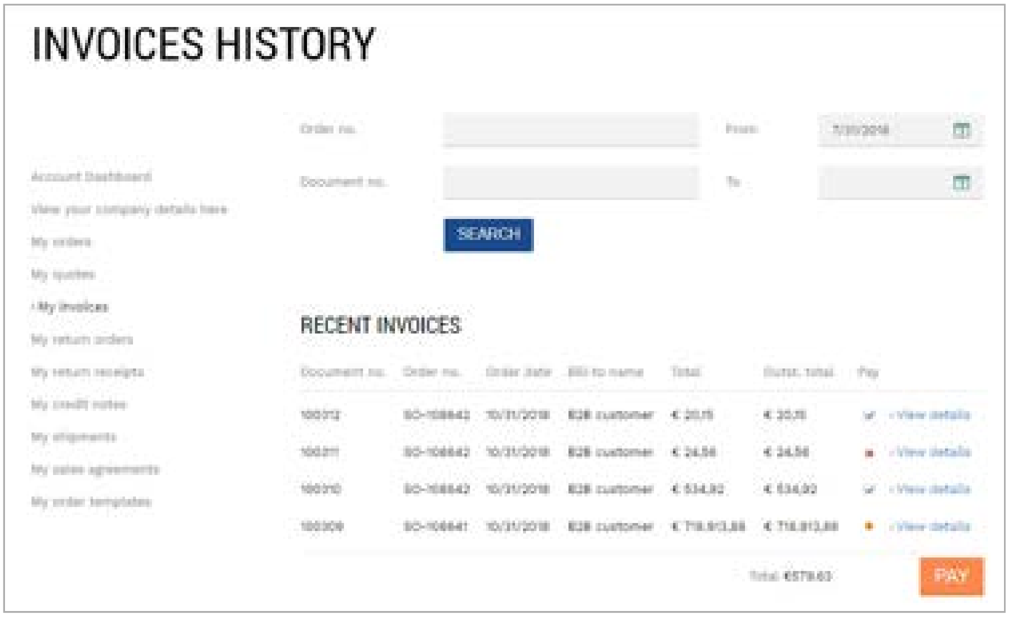


NOTE

If you allow your business customers to pay their invoices online from a Sana web store, then the option "**Online order payments**" for B2B customers must be set to "**Full amount paid on account**". This will disable online payments for sales orders not to pay twice, for the sales order and its invoice.

Your customers can pay their invoices only using their credit/debit card through a payment service provider. You cannot use the "**Internal (on account)**" payment method for invoice payments.

A business customer can pay several invoices at the same time from the invoice history in a Sana web store. Any invoice can be also paid separately from the "**Posted invoice detail**" page.



When a business customer pays the invoice, its status will be changed.

Icon	Status	Description
	Payment is in progress	This status is shown until an accountant posts the payment journal in the ERP system.
	Already paid	When the payment journal is posted in ERP, the invoice payment status will be changed to "Already paid".
	Document is overdue	An invoice can have a due date in the ERP system. If the invoice is not paid within the due date, it will expire, meaning that a customer will not be able to pay this invoice.

Invoice payment e-mails

When the invoice is paid by a customer, he or she receives the invoice payment confirmation e-mail. At the same time, the e-mail that a certain customer has paid one or several outstanding invoices is sent to web store administrator.

Log in to Sana Admin and click: **Setup** > **Basics** > **Store information**. In the "**Invoice payment notifications addresses**" field enter the e-mail address to which e-mails about paid invoices should be sent. These are the e-mails which are sent to the web store administrator.

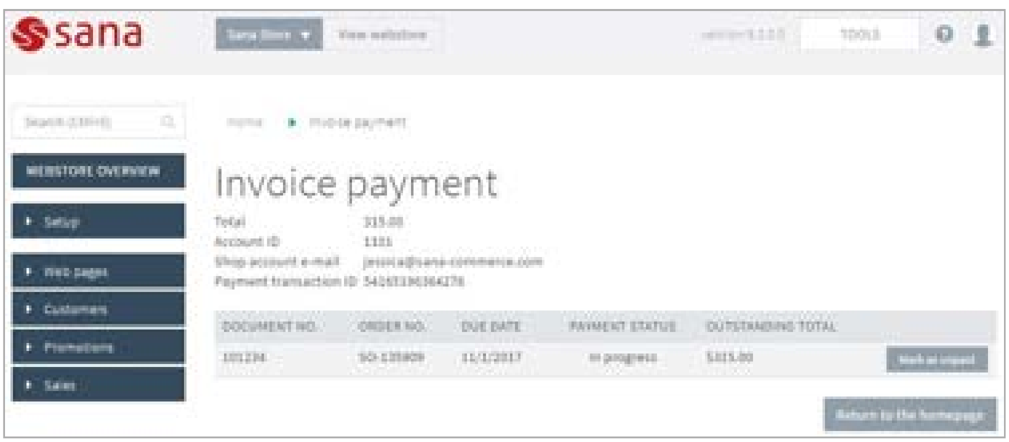
To send invoice payment e-mails to a customer and web store administrator, three e-mail templates are used:

E-mail template	Description
Invoice payment confirmation	Invoice payment confirmation e-mail which is sent to a customer.
Invoice payment confirmation for shop managers	Invoice payment notification which is sent to a web store administrator.
Invoice payment partial success	This e-mail is sent to a web store administrator, if something has gone wrong with invoice payment. For example, payment transaction has failed, or a customer paid the invoice from a Sana web store, but the payment journal was not created in the ERP system due to the wrong setup of the payment account in ERP. Such situations should be manually checked and handled by a web store administrator.

To check e-mail templates which are used for invoice payments, log in to Sana Admin and click: **Setup** > **E-mails**.

In the invoice payment e-mails, which are sent to a web store administrator, there is a link which can be used to check the invoice payment details from Sana Admin. Clicking on this link will open the invoice payment page in Sana Admin.

From this page a web store administrator can also mark the invoice as unpaid. In this case, the invoice payment will be changed back from "in progress" to "not paid" in the Sana web store. The invoice payment can be canceled by a web store administrator until there is no payment record in the payment journal in ERP for this invoice. This might be useful if payment transaction failed and money was not transferred to the required account for some reason, for example. You can mark the invoice as unpaid only if you are sure that the payment transaction failed and you did not receive money.



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Return Orders

Watch the video

Watch the video

NOTE

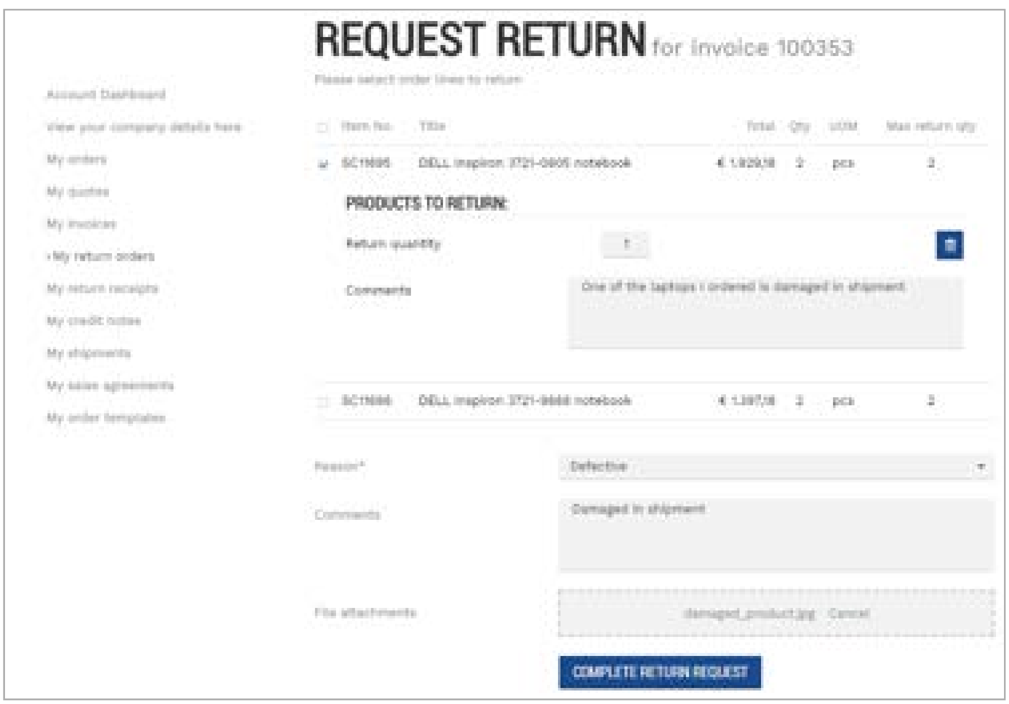
Currently, this feature is not supported by Sana integrated with Microsoft Dynamics GP.

A good return policy is something that customers consider when making an online purchase. A study conducted by different companies shows that 91 - 93% of consumers will buy something again, if a web store provides a good return policy.

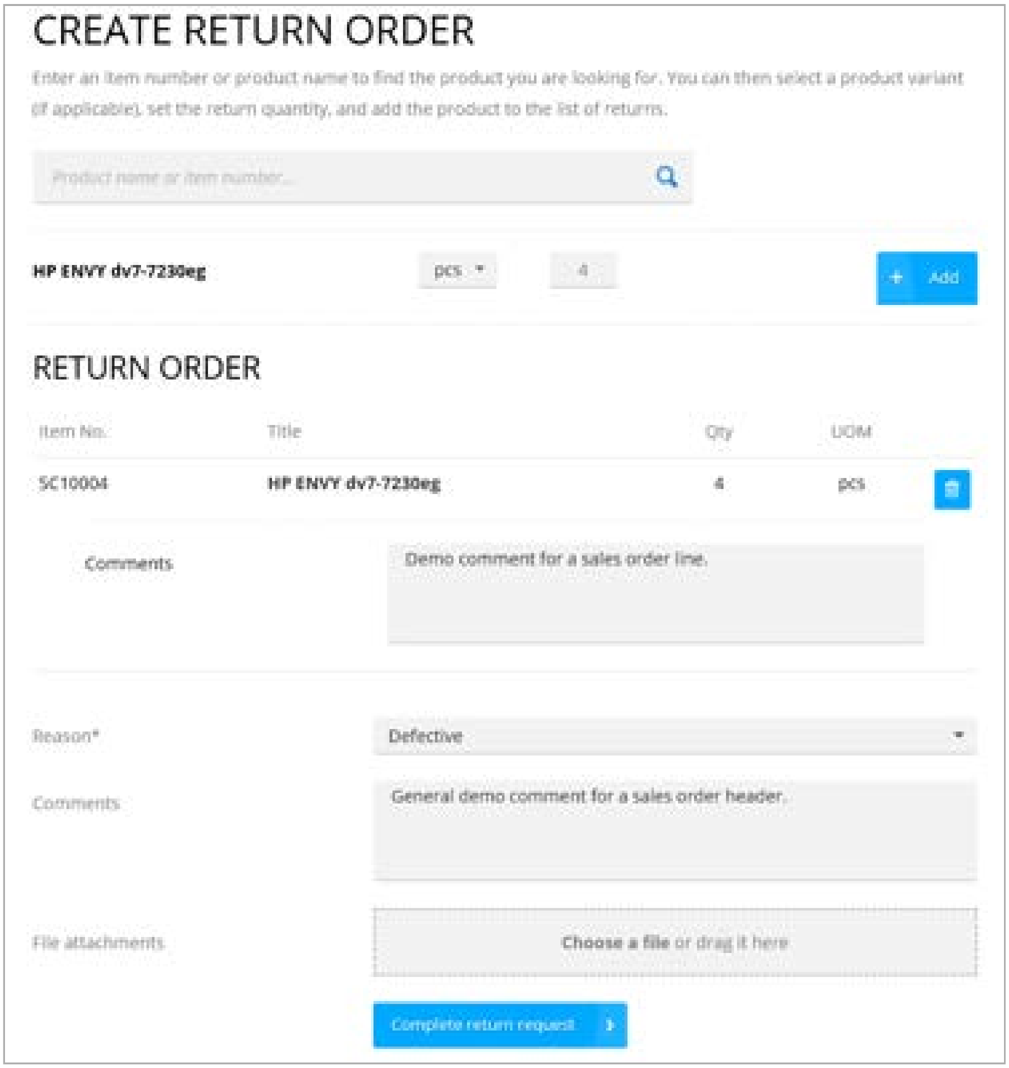
Sana delivers an easy and personalized return experience to build trust relationship between shop owners and their customers. The return process is completely automated and integrated with the sales order processing in the ERP system.

Sana provides two ways of creating a return order:

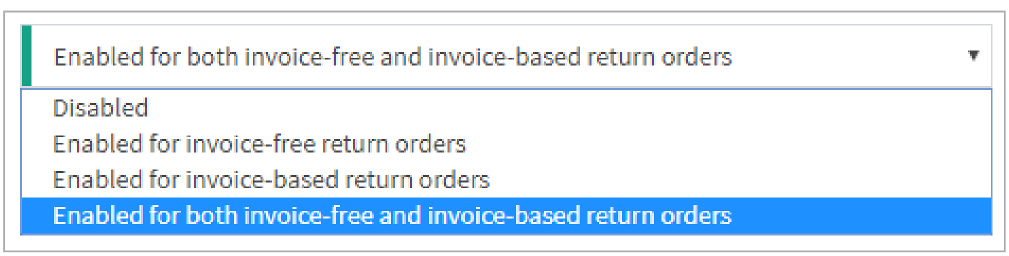
- **Invoice-based** - A customer can create a return order based on invoice by selecting the order lines from the invoice to return. In this case a return order can be created only when the order has been posted in the ERP system and the invoice has been created. A customer can create a return order from the **Posted invoice detail** page in a Sana web store.



- **Invoice-free** - A customer can create a return order which is not connected to any sales document from the **My return orders** page by adding a product to the return order. Such return orders should be checked and processed manually by a sales manager. This option is available to all customers.



To set up return orders for different customer types, log in to Sana Admin and click: **Setup** > **Ordering & checkout** > **Ordering**. Find the **Return orders** field and select the appropriate option.



Option	Description
Disabled	Do not allow customers to create return orders.
Enabled for invoice-free return orders	Allow customers to create return orders which are not connected to invoices on the **My return orders** page.
Enabled for invoice-based return orders	Allow customer to create return orders from invoices.
Enabled for both invoice-free and invoice-based return orders	Allow customers to create return orders from invoices and without any connection to invoices.

For a customer, creating a return order in Sana is really straightforward. All he or she has to do is:

- Choose one or several products and define quantity to return. If a customer creates a return order from invoice, he or she cannot return more than it was purchased.
- Select a return reason. The list of return reasons is retrieved from the ERP system. This is a required field.
- Optionally enter comments and attach files, for example a photo or a copy of a receipt, to provide a shop admin with more details.

When the return order is created by a customer, it is saved to the ERP system. The logic of creating return orders might be different in various ERP systems. Therefore, depending on the ERP system your Sana web store is connected to, there could be slight differences in creating a return order from a Sana web store.

For more information about return orders in different ERP systems, see:

- Return Orders in Microsoft Dynamics NAV
- Return Orders in Microsoft Dynamics AX
- Return Orders in Microsoft Dynamics 365 Business Central
- Return Orders in Microsoft Dynamics 365 for Finance and Operations
- Return Requests in SAP Business One
- Return Orders in SAP ECC

Return order comments

A customer can enter a general comment for a return order and for each sales line. The general comment for a return order is limited to 2000 characters. Return order line comments are limited to 900 characters. All comments are stored in the return order in the ERP system. When the return order is created, comments are also shown on the return order details page in the order history.

File attachments

A customer can attach images, audio, video and PDF files to the return order. Several files can be attached. To attach several files, all required files should be selected and added simultaneously. The total maximum size of file attachments is 12 megabytes. The length of a file name must not exceed 40 characters. When the return order is created, files attached to the return order are also shown on the return order details page in the order history.

File attachment types and extensions, as well as file size and file name limits can be changed in the "Web.config" file of the Sana Commerce frontend.

Files attached to a return order are stored in the file system on the Web server. They can be found on the Web server or shop administrator can also view file attachments directly from Sana Admin using **File manager**. In **File manager** all files attached to the return orders can be found at the following location: **Documents** > **Sales document attachments** > **Return order**. Each folder inside the "Return order" folder corresponds to a specific return order by its ID.

In the ERP system a link to the file attached by a customer is stored. If an ERP system supports document managements, a user in ERP can also attach files to the return order which will be shown to a customer on the return order details page.

Return order e-mails

When the return order is created by a customer, he or she receives a return order confirmation e-mail. At the same time, the e-mail that the return order has been created is sent to web store administrator.

Log in to Sana Admin and click: **Setup** > **Basics** > **Store information**. In the **RMA notifications addresses** field, enter the e-mail address to which e-mails about created return orders should be sent. These are the e-mails which are sent to the web store administrator.

To send return order e-mails to a customer and web store administrator, two e-mail templates are used:

E-mail template	**Description**
Return order confirmation	Return order confirmation e-mail which is sent to a customer.
New return order request	Return order notification which is sent to a web store administrator.

To check e-mail templates which are used for return orders, log in to Sana Admin and click: **Setup** > **E-mails**.

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Credit Limits

NOTE

To use credit limits you must enable and configure credit limits for your customers in your ERP system. Below you can read about credit limits logic in Sana and see the links to the articles where you can read how to set up credit limits in the ERP systems.

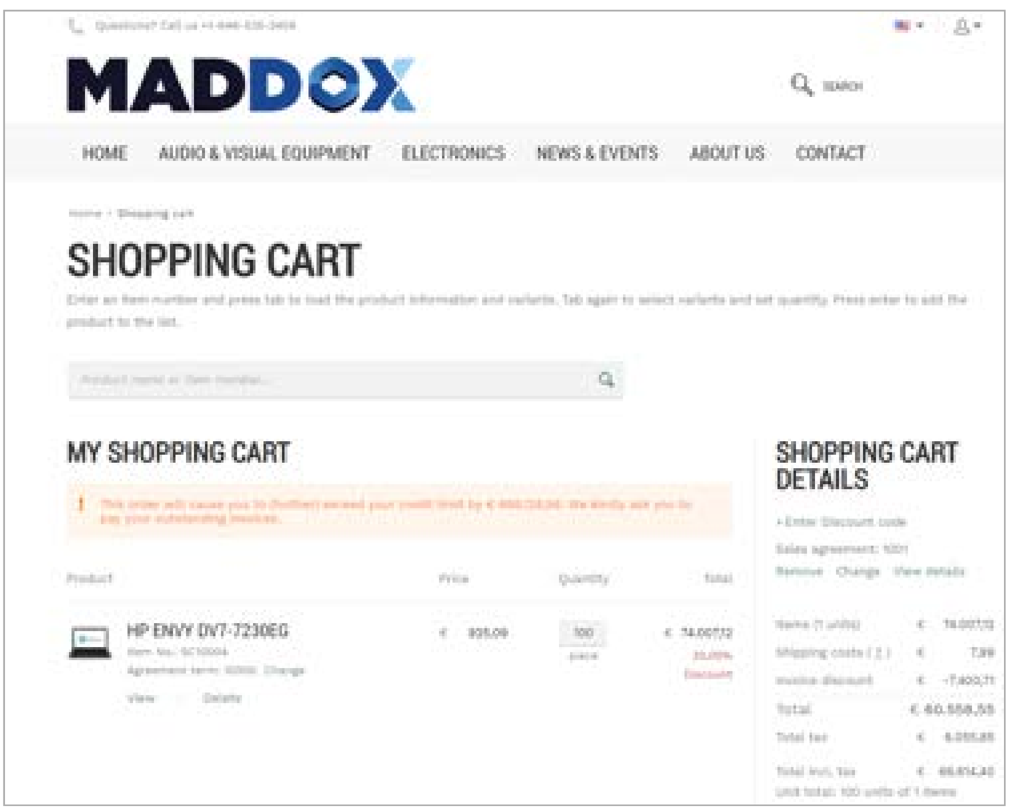
Different businesses might have their own credit management needs. Credit management allows you to reduce the credit risk by setting up the credit limit for your business customers. You can set up credit limits in your ERP system.

If a business customer places an order which exceeds his or her credit limit set in the ERP system, a customer will see a warning or error message in the shopping cart of the Sana web store. A warning message is also shown on all checkout steps.

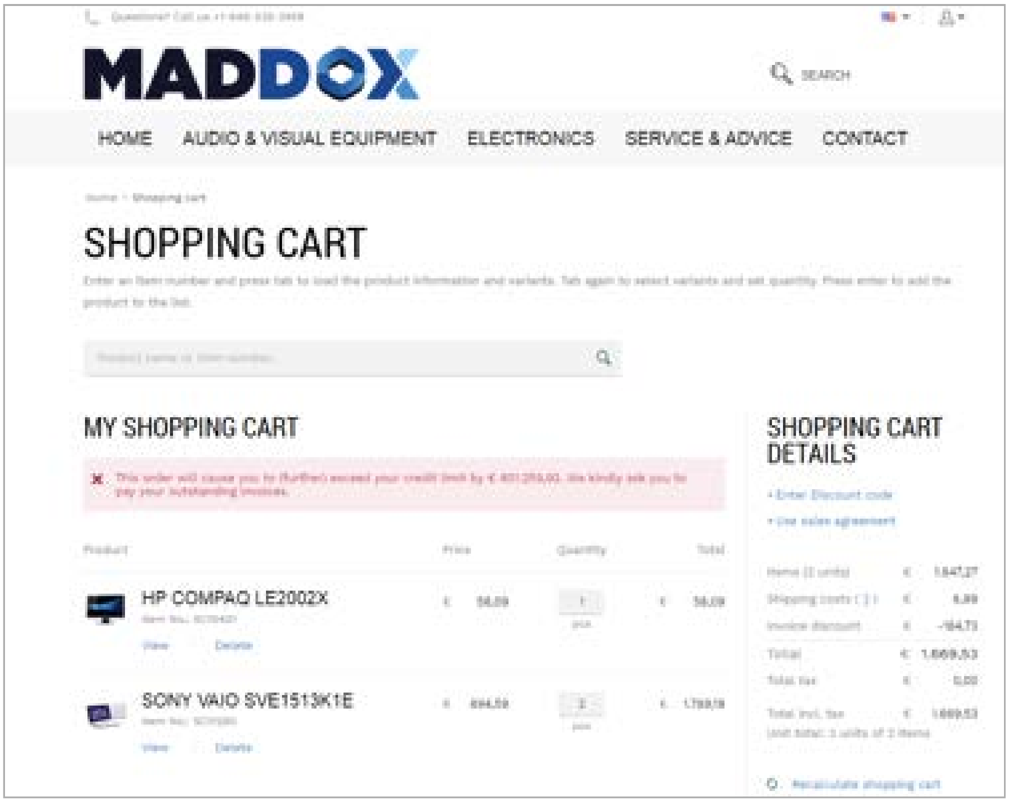
Warning message

NOTE

Starting from Sana 9.3.1 a warning message is shown on all checkout steps. It applies to "one step checkout" and "multistep checkout".



Error message



NOTE

If the ERP system can strictly enforce the credit limit checks for customers by showing an error message instead of a warning, then customers will see the error message in the shopping cart of a Sana web store, when they exceed the credit limit, and they will not be able to place orders. If the error message is set for the credit limit checks in ERP, it will override the option selected in the **Validate credit limits** field in Sana Admin.

Credit limits must be set up in Sana Admin and in ERP. Credit limit and customer's balance are calculated in ERP and are used by Sana.

NOTE

There might be some differences depending on the ERP system you are using. Sana has no influence on how credit limits and customer's balance are calculated in ERP. The default ERP logic is used. If credit limits are configured for the customers in the ERP system, they will be always calculated in ERP, regardless of the settings in Sana. In Sana Admin you can only control which message must be shown to a customer in the shopping cart when he or she exceeds the credit limit, and how customers should pay their orders when they exceed their credit limit.

Credit limits and other Sana features

Order processing strategies

All order processing strategies work with credit limits.

If you use the **Default** or **Optimize for large orders** order processing strategy, and a customer exceeds the credit limit, he or she will see a warning message in the shopping cart and on all checkout steps.

If you use the **Optimize for fast ordering** order processing strategy, and a customer exceeds the credit limit, he or she will not see a warning message in the shopping cart and on all checkout steps, but the amount a customer exceeded will be calculated in the ERP system once the order is created.

For more information about order processing strategies, see "Order Processing".

Sales quotes and orders

A customer with a credit limit can place orders and quotes as well as convert quotes to orders.

Quotes do not have any impact on credit limits. Only when a customer converts a quote to an order, the payment amount of this order will be considered. If the credit limit is exceeded, the customer will see a warning message, and will be asked to pay the order either on account or online via the payment gateway depending on the payment type that is used.

For more information about different sales documents supported by Sana, see "Order Processing".

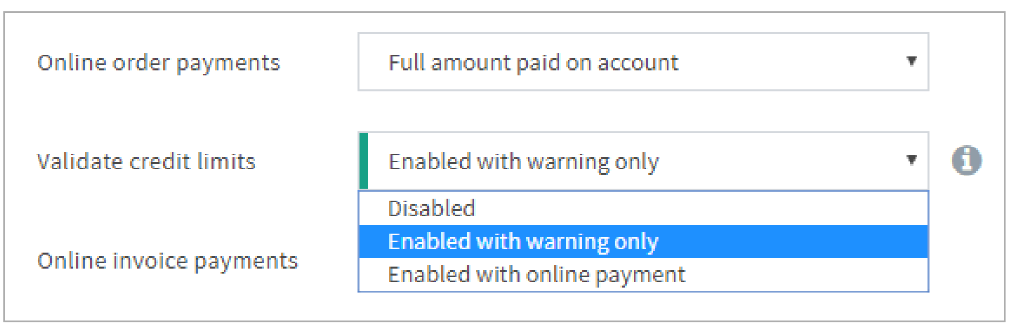
Shop account roles

You can set up credit limits in the ERP system for a regular customer, account manager and for a sub-account. Unlike regular customers and account managers, sub-accounts can pay only on account.

For more information, see "Shop Account Roles".

Set up credit limits in Sana Admin

In Sana Admin click: **Setup** > **Ordering & checkout** > **Ordering**.



Credit limits can be set up only for B2B customers. See the field **Validate credit limits**. There might be some differences depending on the combination of settings **Online order payments** and **Validate credit limits**. See the table below. There you will learn how Sana validates the credit limit, when it is exceeded by a customer and it is set to show a warning message in the ERP system.

	Online order payments		
Validate credit limits	**Amount based on prepayment rules**	**Full amount paid on account**	**Full amount paid online**
Disabled	Prepayments are only supported by Microsoft Dynamics NAV, Microsoft	The warning message is not shown, but the credit limit is still calculated for a	Not supported.

	Dynamics 365 Business Central and SAP ERP. The warning message is not shown, but the credit limit is still calculated for a customer in ERP. A customer goes through the usual checkout process. If prepayment percentage equals to 0, then the **Payment information** (online payments) checkout step is not available and a customer has to pay full amount on account. If a customer has some prepayment percentage, then the **Payment information** (online payments) checkout step is available and the prepayment amount that must be paid by a customer is shown.	customer in ERP. A customer goes through the usual checkout process and pays full amount on account.	When you set the option **Online order payments** to **Full amount paid online**, the field **Validate credit limits** is not available.
Enabled with warning only	A warning message is shown, informing a customer that he or she should pay the outstanding invoices. A customer can also see the amount by which he or she exceeds the credit limit. If prepayment percentage equals to 0, then the **Payment information** (online payments) checkout step is not available and a customer has to pay full amount on account. If a customer has some prepayment percentage, then the **Payment information** (online payments) checkout step is available and the prepayment amount that must be paid by a customer is shown.	A warning message is shown, informing a customer that he or she should pay the outstanding invoices. A customer can also see the amount by which he or she exceeds the credit limit. A customer pays on account.	Not supported. When you set the option **Online order payments** to **Full amount paid online**, the field **Validate credit limits** is not available.
Enabled with online payment	A warning message is shown, informing a customer that he or she should pay the	A warning message is shown, informing a customer that he or she should pay the	Not supported.

	order online through a payment gateway. A customer can also see the amount by which he or she exceeds the credit limit. A customer has to pay full amount online through a payment gateway, even if the prepayment percentage is set for this customer in the ERP system.	order online through a payment gateway. A customer can also see the amount by which he or she exceeds the credit limit. A customer has to pay full amount online through a payment gateway, even if the option **Online order payments** is set to **Full amount paid on account**.	When you set the option **Online order payments** to **Full amount paid online**, the field **Validate credit limits** is not available.

See also:

Microsoft Dynamics NAV: Credit Limits

Microsoft Dynamics AX: Credit Limits

Microsoft Dynamics GP: Credit Limit

Microsoft Dynamics 365 Business Central: Credit Limits

Microsoft Dynamics 365 for Finance and Operations: Credit Limits

SAP ERP: Credit Limits

SAP Business One: Credit Limit

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Sales Agreements

NOTE

Microsoft Dynamics GP does not support sales agreements.

Sales agreements are available only to B2B customers and sales agents.

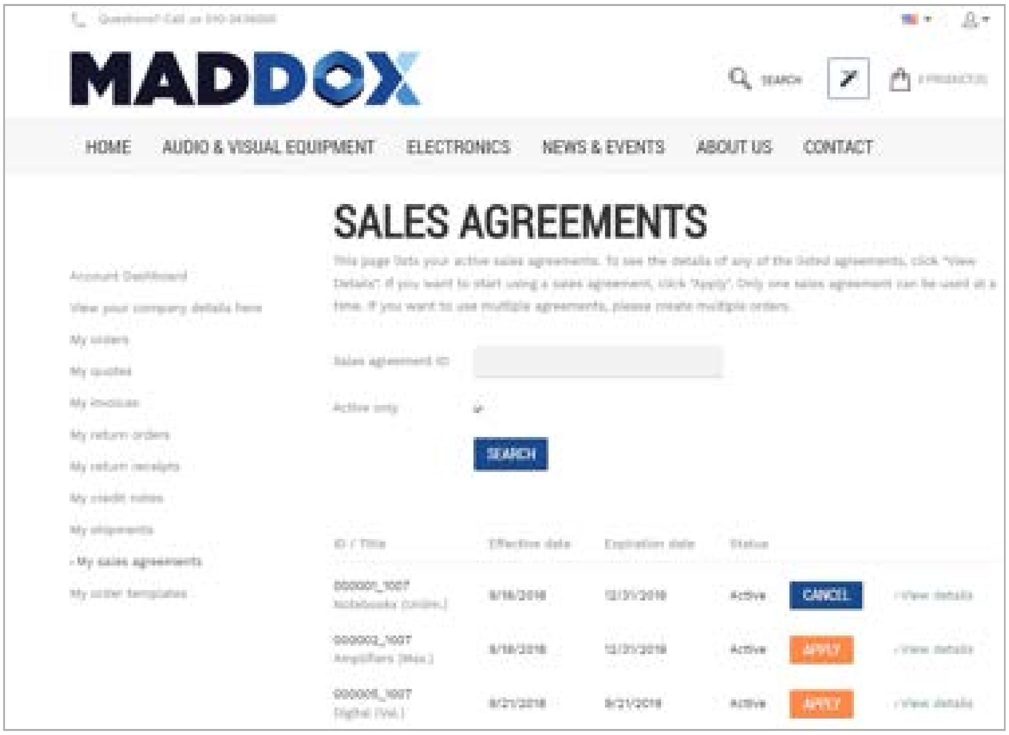
Companies that sell products in bulk usually have more complex and long-term sales agreements with their customers. A sales agreement is a contract that commits the customer to buy products in a specific quantity or for a specific amount over time, in exchange for special prices and discounts.

You can set up sales agreements in your ERP system:

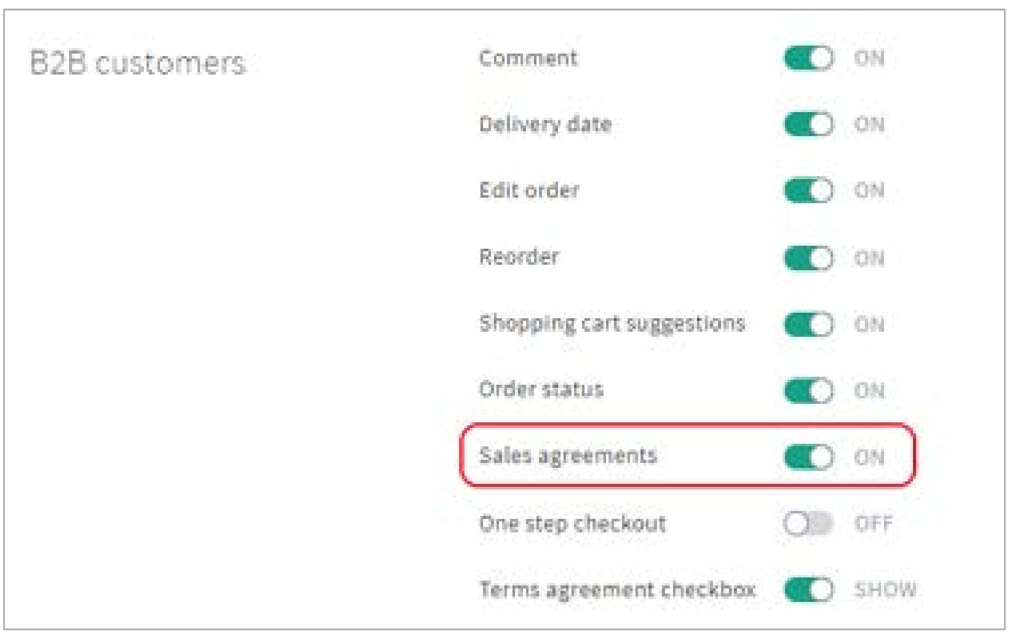
- In Microsoft Dynamics NAV, use Blanket Sales Orders
- In Microsoft Dynamics AX, use Sales Agreements
- In Microsoft Dynamics 365 Business Central, use Blanket Sales Orders
- In Microsoft Dynamics 365 for Finance and Operations, use Sales Agreements
- In SAP Business One, use Sales Blanket Agreements
- In SAP ERP, use Quantity Contract

The prices and discounts of the sales agreements override other prices and discounts, for example sales prices and discounts or trade agreements.

Business customers can see all available sales agreements and their details in the Sana web store. A customer can place an order based on the sales agreements that he or she has with the merchant triggering all the terms and conditions in the ERP system. A customer can also combine the products from the sales agreements with those that do not relate to any agreement in one sales order.



To enable or disable sales agreements for B2B customers and sales agents, log in to Sana Admin and click: **Setup** > **Ordering & checkout** > **Ordering**.



Sales agreement limitations

Here are some limitations that you might need to know if you are going to use sales agreements.

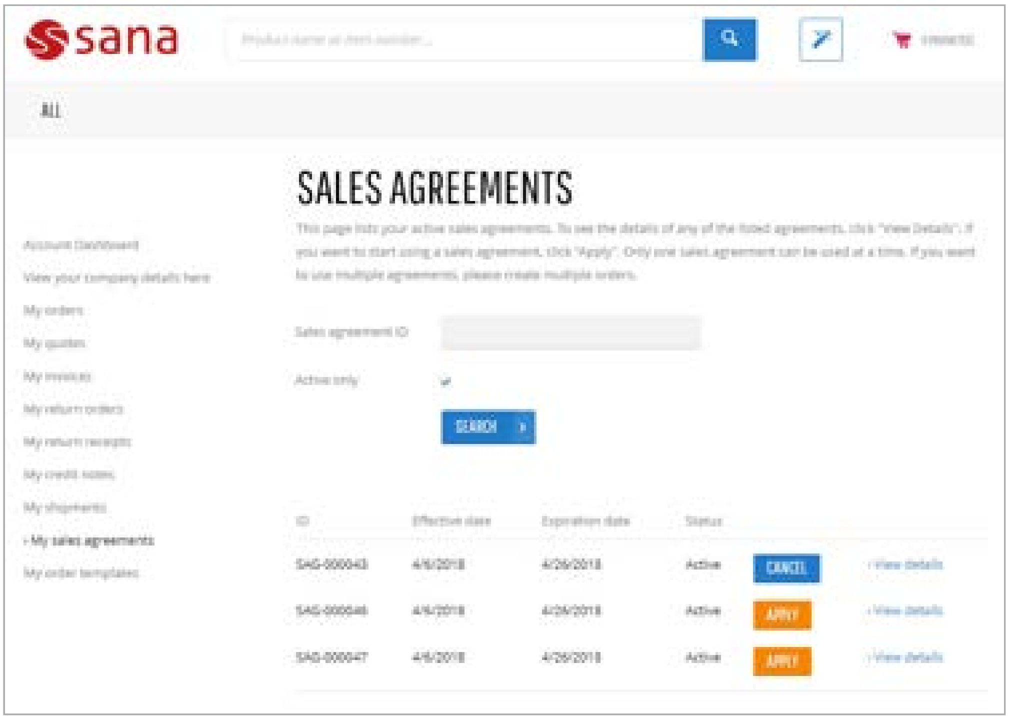
1. Sales agreements work with the **Default order processing** strategy only and are not available if you use one of the following strategies:
   - Optimize for fast ordering
   - Optimize for large orders
2. B2B customers cannot edit sales orders created using sales agreements.

3. Sales agreements are not supported for quotes.
4. Sales agreements are not available when Sana is in the maintenance mode.

Sales agreements in Sana

Depending on the ERP system your Sana web store is connected to, there could be slight differences.

If sales agreements are available for a customer in the ERP system and they are enabled in Sana Admin, then they will be shown on the **My Account** page in the Sana web store.



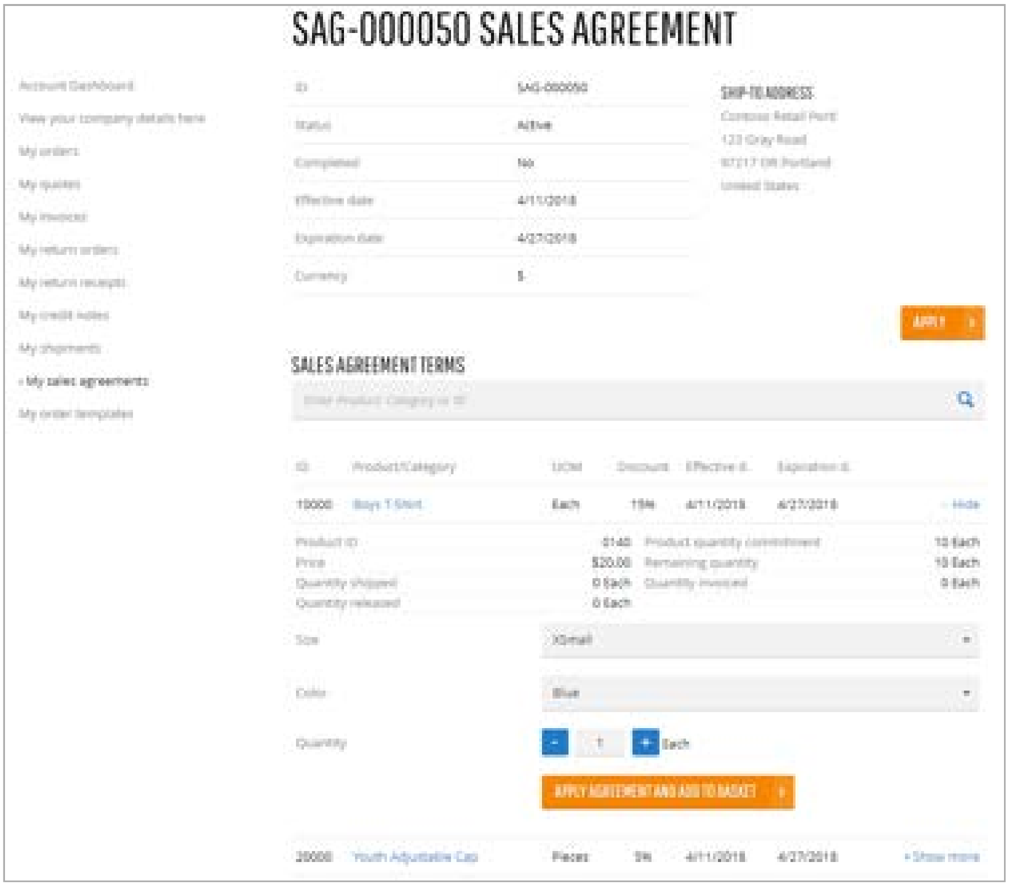
Only one sales agreement can be applied to a shopping cart. If you want to use several sales agreements, you will need to create multiple orders.

Customers can search for the sales agreement by its number. Using the **Active only** checkbox, customers can see only valid sales agreements or all available.

Below you can see descriptions of the available sales agreement statuses.

Status	Description
Active	The sales agreement is valid and can be used by a customer.
On hold	Available only in Microsoft Dynamics AX. The sales agreement is waiting to become valid, or the agreement is no longer used.
Closed	The sales agreement is completely fulfilled by the customer.

Click **View details** to see the information about a sales agreement and its terms (sales agreement lines). All details of the sales agreements and their lines are taken from the ERP system.



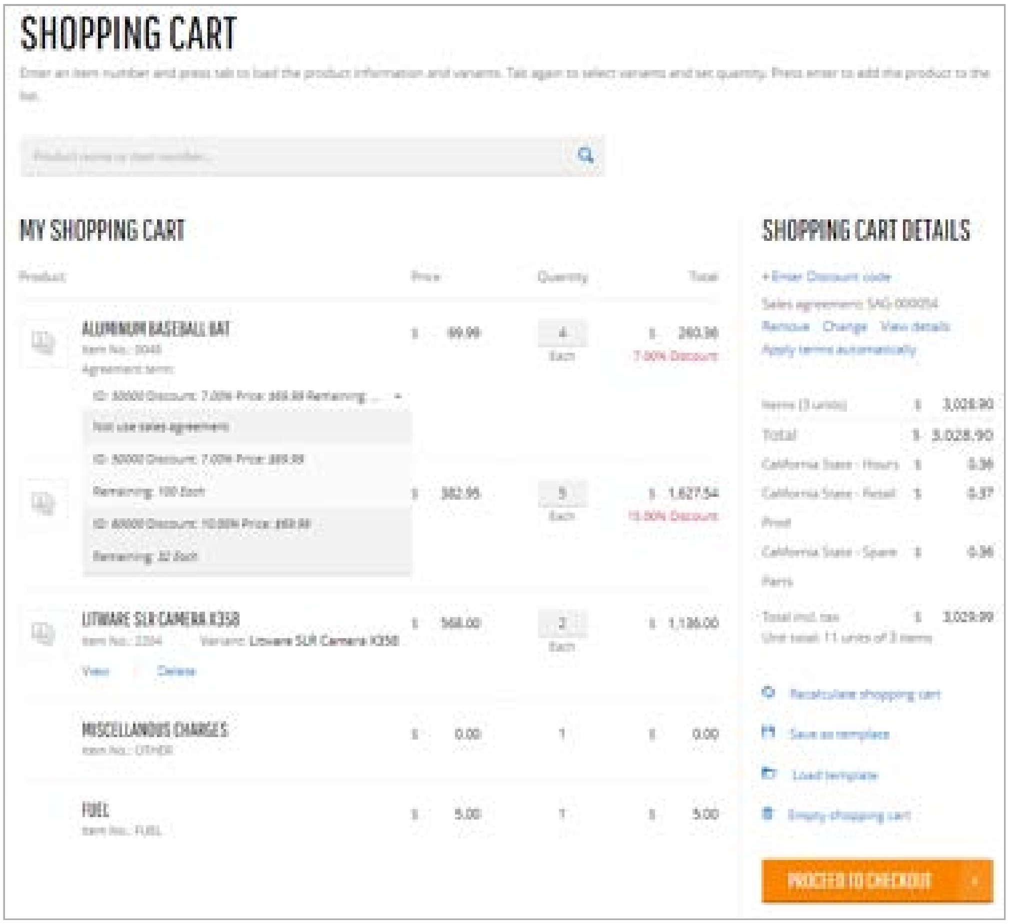
A customer can search for a sales agreement term (line) by product number, product name, agreement term number, product category number and name.

Each sales agreement term (line) contains information, like how many units of a product a customer committed to buy or commitment amount, a discount percentage a customer will get, if he or she buys a certain quantity of a product or products for a certain amount, as well as product or category ID and name, product unit of measure, location (warehouse) where the product is stored and shipped from, also shipped, invoiced, released and remaining quantity or amount.

A customer can also check the validity period of a sales agreement and its terms (lines).

A customer can check and apply a sales agreement:

- On the **Sales agreements** page. You can open it from the **My account** page.
- On the details page of a particular sales agreement. When you add a product to the shopping cart from the sales agreement details page, the agreement will be automatically applied to it.
- On the product details page, if there is a sales agreement for this product.
- In the shopping cart. There you can open the list of all sales agreements, see the sales agreement that has been applied to the shopping cart, remove it, change, view details and change the sales agreement term for each line.



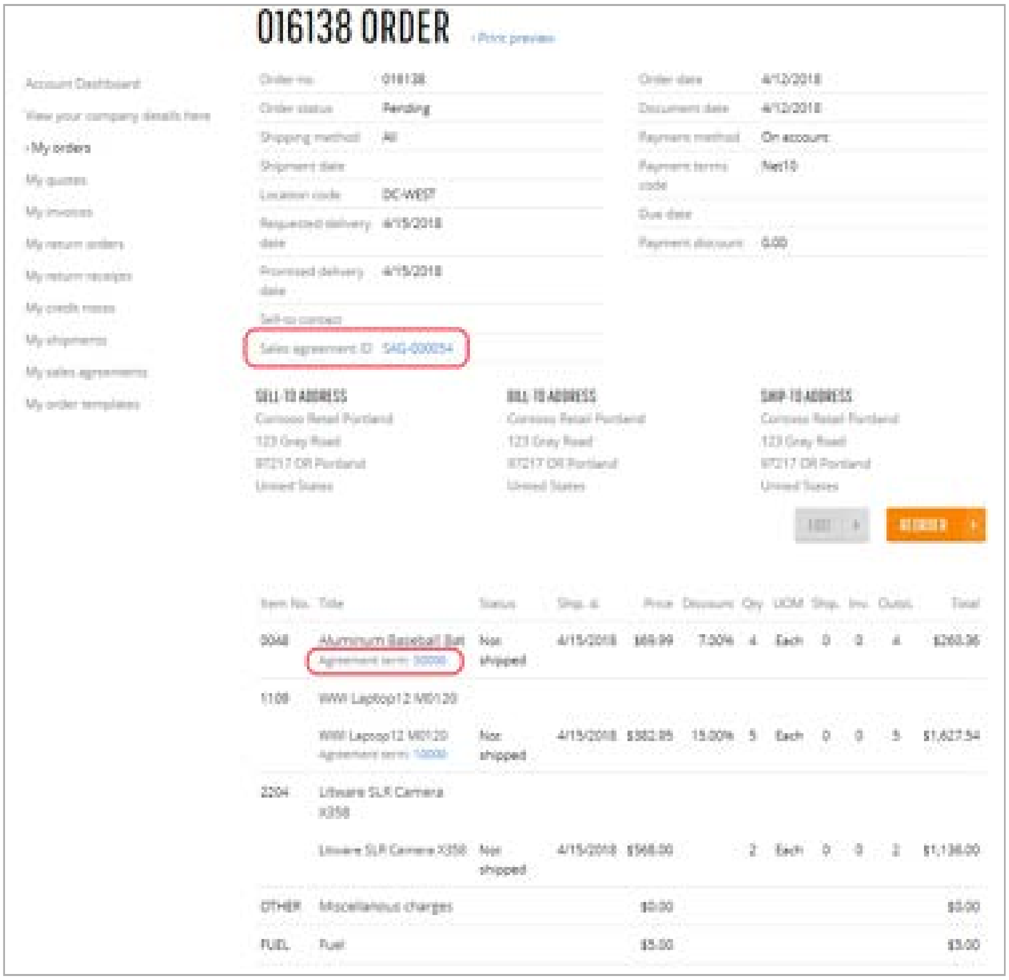
When a customer applies a sales agreement to the shopping cart and if no sales agreement term is selected for the sales order line, he or she can select it by clicking **Change** next to the **Agreement term** field below the sales order line.

> **NOTE**
>
> If you use **Microsoft Dynamics AX 2012**, your customers can apply sales agreement terms automatically to all sales order lines by clicking **Apply terms automatically**. Microsoft Dynamics AX takes the first sales agreement term that meets the conditions and assigns it to the sales order line.

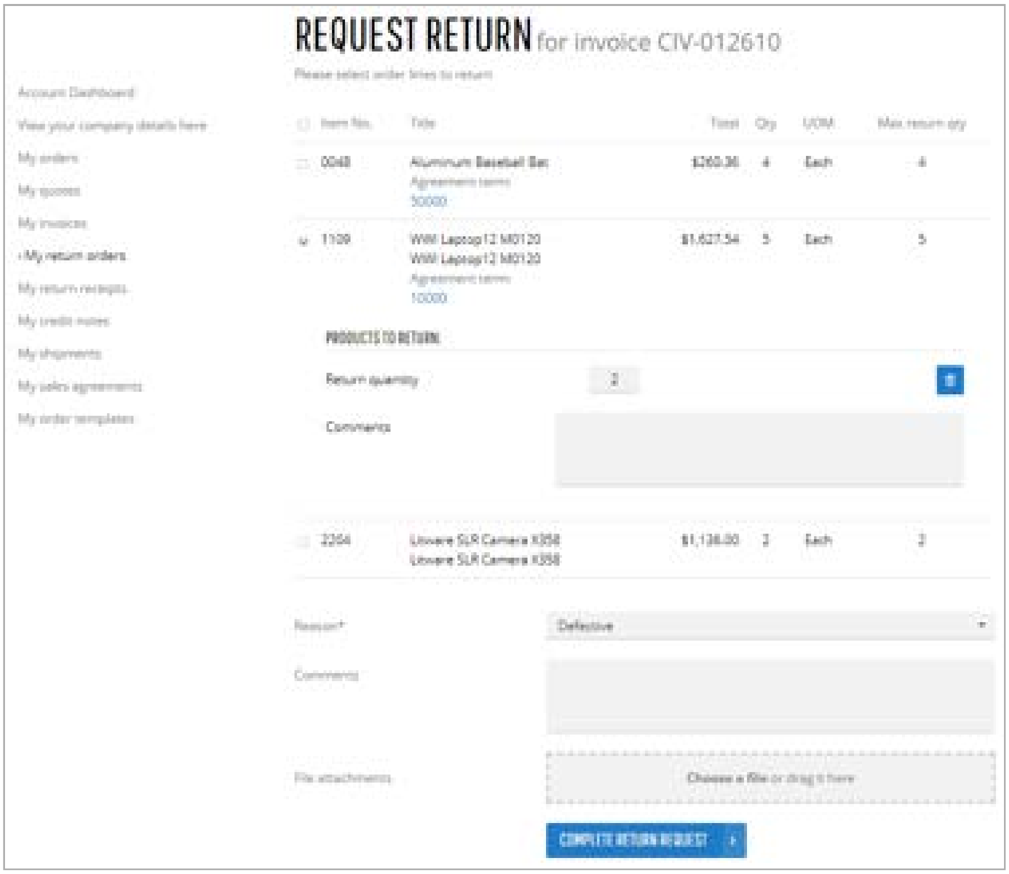
A product should satisfy all requirements of a sales agreement, otherwise a customer will not get an agreed discount or special price. For example, according to a sales agreement a customer can get a discount, if he or she buys a certain product in pieces. In case a customer buys this product in a different unit of measure, the conditions of the sales agreement will not be fulfilled and a customer will not get the agreed discount. A customer will not be able to use the sales agreement also, if its currency differs from the currency of the customer.

When a customer applies a sales agreement to the shopping cart and places an order, information about the sales agreement that is used will be shown in the order details.

A customer can see the sales agreement ID that was applied to the sales order and the agreement terms that were used for each sales order line. It's possible to open the sales agreement and its terms that were used for the order and check the details by clicking on the links.



A customer can return products purchased based on sales agreements. When a customer creates a return order from the invoice, he or she will see the agreements applied to the sales order lines.


REQUEST RETURN for invoice CIV-012610
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My quotes
My invoices
My return orders
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My credit notes
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My sales agreements
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Max return qty
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Agreement terms
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$260.36
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Shopping Cart Suggestions

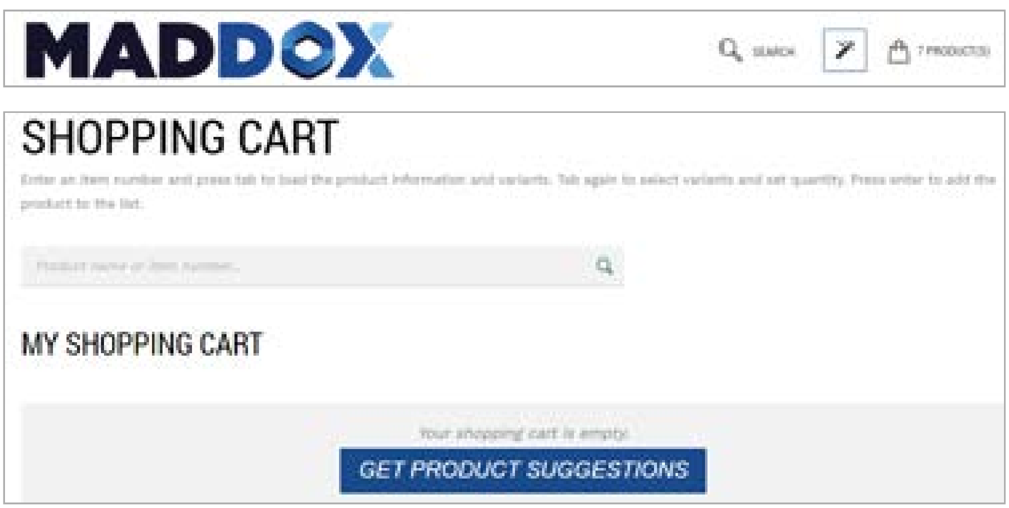
Watch the video

Use shopping cart suggestions to offer your customers the products which they might be interested to buy. Customers are often loyal to a particular brand or some products which they frequently buy, thus it's a good idea to build suggestions based on the customer's shopping behavior. As all customer's sales data is stored in the ERP system you can easily recommend certain products to a customer based on the customer's order history. The ERP system uses specific rules to single out product suggestions for a customer.

Set up shopping cart suggestions

Step 1: In Sana Admin click: **Setup** > **Ordering & checkout** > **Ordering**. Enable the **Shopping cart suggestions** option.

When the **Shopping cart suggestions** option is enabled then customers will see the product suggestions button at the top of the webstore and the **Get product suggestions** button in the shopping cart.



Step 2: Create a product list page or a flexi-page with the product set content element. Assign the "**Suggested products"** product set to this page. This is a dummy product set which already exists in Sana. It is used to show suggested products from the ERP system to a customer.

NOTE

If you use a product list page with a dummy product set "**Suggested products"**, facetted filters will not be shown on a page.

NOTE

If you use a flexi-page and assign a product set as a content element, you can define the **maximum number of products** to be shown on a page as suggested. By default it is set to 12. This is done because the flexi-page unlike the product list page does not have paging. If a lot of products will be retrieved from the ERP system and shown as suggested to a customer, this may influence webstore performance.

Step 3: In Sana Admin click: **Setup** > **Web pages** > **Shopping cart suggestions**. Select the page which you created in the previous step. Clicking on the product suggestions button in the webstore opens this page. Product suggestions are retrieved from the ERP system, based on the customer's order history within a certain period set in ERP, and are shown to the customer.

NOTE

You can also use the product set with the predefined products and assign it to the page instead of the dummy product set "Suggested products". In this case all customers will see the products from this product set as suggested, but not the products based on the customer's order history from the ERP system. If you use a product list page with a real product set containing predefined products, facetted filters will be shown on a page.

In the ERP system you can easily change the algorithm of how to get product suggestions:

- See how to set up shopping cart suggestions in Microsoft Dynamics NAV.
- See how to set up shopping cart suggestions in Microsoft Dynamics AX.
- See how to set up shopping cart suggestions in Microsoft Dynamics GP.
- See how to set up shopping cart suggestions in Microsoft Dynamics 365 Business Central.
- See how to set up shopping cart suggestions in Microsoft Dynamics 365 for Finance and Operations.
- See how to set up shopping cart suggestions in SAP Business One.
- See how to set up shopping cart suggestions in SAP ECC.

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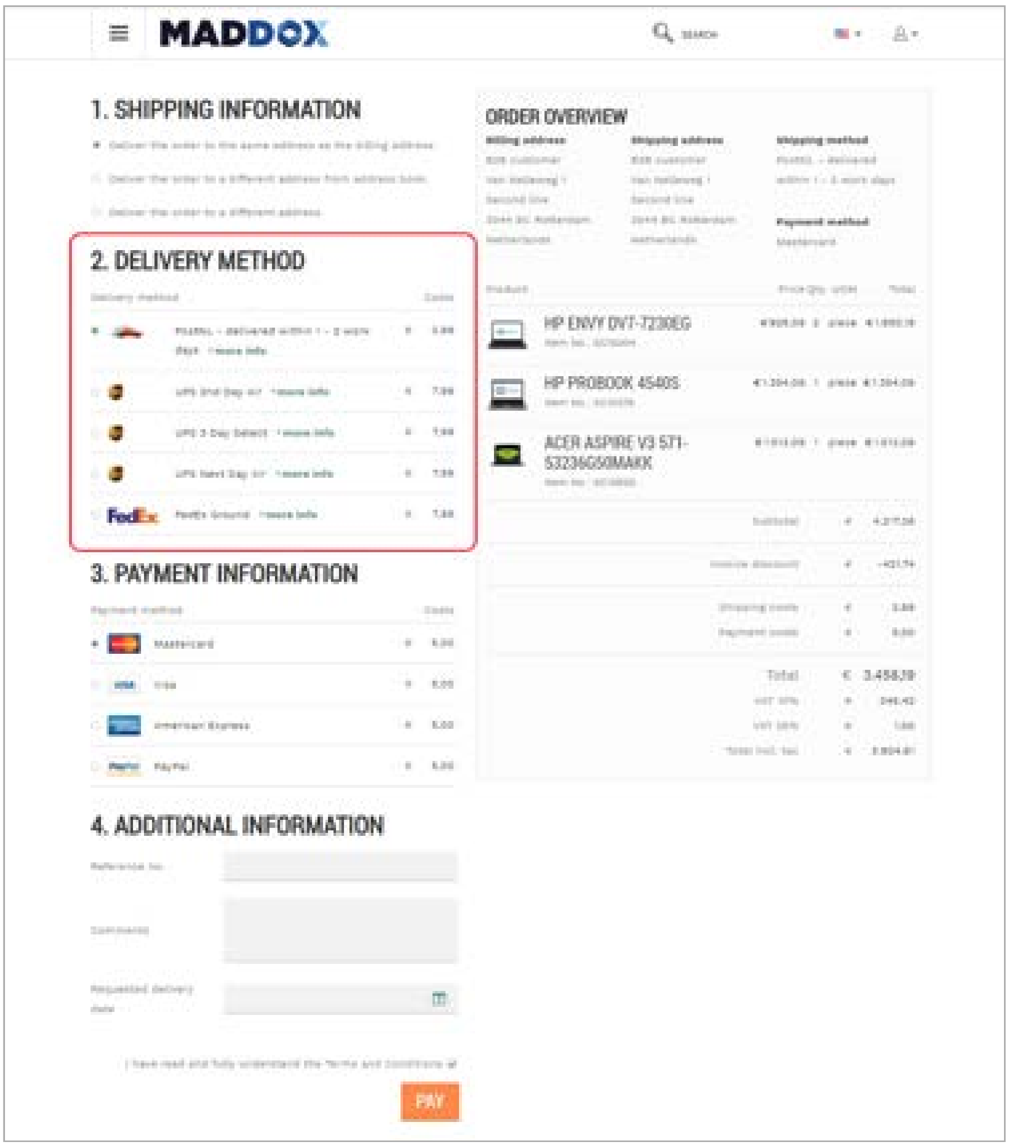
Shipping Methods

Watch the video

An important part of your webstore administration is managing the delivery of products to your customers.



To set up shipping methods in Sana Admin click: **Setup** > **Ordering & checkout** > **Shipping methods**.

Before you start to set up shipping methods, think about what can have an influence on the delivery of your products, destinations you will deliver to.

Sana Commerce supports different strategies for configuring shipping methods and you can use any or all of them:

- **Fixed shipping costs**

  Set up fixed shipping costs based on the country of delivery, order total and weight of the product.

- **Carrier-calculated shipping**

  Sana Commerce provides real-time integration with FedEx, UPS and USPS shipping services. The external shipping services are available as add-ons which can be installed directly from Sana Admin using Sana Apps.

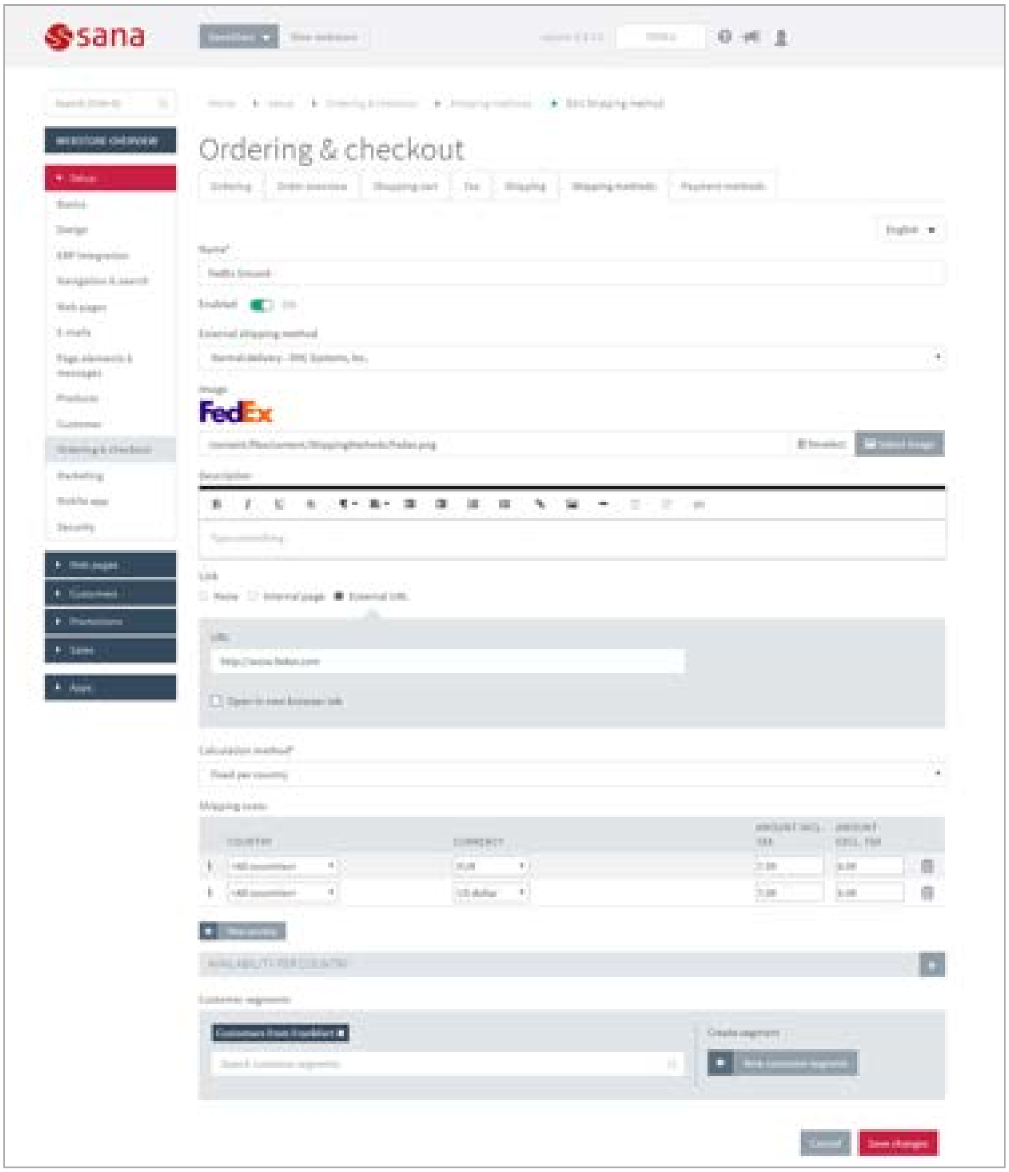
  If the add-on is installed, the shipping costs are calculated by the shipping service real-time depending on the selected shipping method, customer's shipping address, actual weight and dimensions of the package.

If you are going to use shipping methods based on weight and physical dimensions of a package, read how to set up weight of a product and physical dimensions in the ERP system:

- **Microsoft Dynamics NAV**: Item Physical Dimensions
- **Microsoft Dynamics AX**: Product Physical Dimensions
- **Microsoft Dynamics GP**: Item Weight
- **Microsoft Dynamics 365 for Finance and Operations**: Product Physical Dimensions
- **SAP Business One**: Item Weight and Dimensions
- **SAP ERP**: Material Weight and Dimensions

Set up shipping methods

On the **Shipping methods** tab, click **New item**. You can create as many shipping methods based on different calculation methods as needed.



The table below provides the description of the fields and settings that should be configured when you create shipping methods:

Fields and settings	Description
Name	Enter the name of the shipping method.
Enabled	Enable/disable the shipping method. You can also enable/disable shipping methods on the shipping methods list page.
External shipping method	Map the shipping method to the one configured in your ERP system. If the shipping method in Sana Admin is mapped to the shipping method in your ERP system, then when a customer places an order in the webstore the selected shipping method will be stored in the sales order in the ERP system. **See also**: **Microsoft Dynamics NAV**: Shipping Agents and Services **Microsoft Dynamics AX**: Shipping Providers and Methods **Microsoft Dynamics GP**: Shipping Methods

	Microsoft Dynamics 365 Business Central: Shipping Agents and Services **Microsoft Dynamics 365 for Finance and Operations**: Modes of delivery **SAP Business One**: Shipping Methods **SAP**: Shipping Methods
Image	Add an image icon of the shipping provider. If you add an icon, it will be shown in the webstore in the list of delivery methods.
Description	You can add a description to the shipping method. Shipping method description is shown in the Sana web store on the 'Delivery method' checkout step, where a customer can select the shipping method he or she wants his or her order to be delivered. Shipping method description is not shown when **One step checkout** is enabled.
Link	You can add a link to the external website or internal page that contains some additional information.
Calculation method	Select the calculation method: • **Fixed per country** - this calculation method uses fixed amounts based on countries of delivery and currency. • **By country and order total** - this calculation method uses fixed amounts based on countries of delivery, currency and order total. • **By country and weight** - this calculation method uses fixed amounts based on countries of delivery, currency and order weight. • **FedEx** - the shipping costs are calculated by FedEx in real-time depending on the FedEx service type, customer's shipping address, actual weight and dimensions of the package. • **UPS** - the shipping costs are calculated by UPS in real-time depending on the UPS service type, customer's shipping address, actual weight and dimensions of the package. • **USPS** - the shipping costs are calculated by USPS real-time depending on the USPS service type, customer's shipping address, actual weight and dimensions of the package. When you select the FedEx, UPS or USPS calculation method the configuration of shipping costs is not available as shipping costs are calculated by the shipping service real-time. If you create FedEx, UPS or USPS calculation method you should select the service type.
Shipping costs	Enter the fixed shipping costs that are based on country and currency and other aspects, like order amount or weight, depending on the selected calculation method. If shipping cost is 0, the text "**Free**" will be shown, meaning that delivery is free of charge. The color of the text is green by default, but you can change it in the web store theme settings. **Fixed per country** Select the country and currency for which the shipping costs should be set. The lists of countries and currencies are retrieved from your ERP system.

	Enter the shipping costs including and excluding tax. When a customer places an order in the webstore, the appropriate price is retrieved depending on whether the prices including VAT (sales tax) is enabled or disabled for the customer in your ERP system. **By country and order total** Select the country and currency for which the shipping costs should be set. The lists of countries and currencies are retrieved from your ERP system. Enter the minimum order amount and the maximum order amount. For all orders below the minimum order amount and above the maximum order amount (outside the configured range), the shipping method will not be shown. Enter the shipping costs including and excluding tax. When a customer places an order in the webstore the appropriate price is retrieved depending on whether the prices including VAT (sales tax) is enabled or disabled for the customer in your ERP system. **By country and weight** Select the country and currency for which the shipping costs should be set. The lists of countries and currencies are retrieved from your ERP system. Enter the minimum weight and the maximum weight. For all orders below the minimum weight and above the maximum weight (outside the configured range), the shipping method will not be shown. To set up the unit of mass (gram, kilogram, ounce or pound) for shipping costs calculation based on the weight in Sana Admin click: **Setup** > **Products** > **Units of measure** and select weight unit. Enter the shipping costs including and excluding tax. When a customer places an order in the webstore the appropriate price is retrieved depending on whether the prices including VAT (sales tax) is enabled or disabled for the customer in your ERP system.
Service type	FedEx gives you choices when you want to ship online. When you create a FedEx shipping method select one of the available FedEx service types. Each FedEx service type calculates prices depending on different aspects, like country of delivery, weight of a package and its dimensions. When a customer places an order in the webstore availability of FedEx shipping methods also depends on these aspects. For a detailed information about different FedEx services, visit FedEx website.
Availability per country	Select countries for which the shipping method should be available. If some country is not selected, the shipping method will not be available for delivery addresses in that country.
Customer segments	**Applies to**: Sana 9.3.1 and higher Assign customer segments. Using customer segments you can filter shipping methods. If you add a customer segment to the shipping method, then this shipping method will be available only to the customers that meet the criteria set in the customer segment. Other customers will not see this shipping method.

	This way you have more flexibility in setting up availability of different shipping methods based on various data from Sana and ERP. For example, if you create a customer segment which includes customers from a specific city and assign this customer segment to a shipping method, then only the customers from this city will be able to use this shipping method in the Sana web store. This means that using customer segments you can set up shipping methods not only for different countries, but even for cities for example. If you assign a customer segment to a shipping method, then you will see the icon on the **Shipping methods** page. This way a user can see an overview of all shipping methods on a page to which customer segments are assigned and don't need to check the settings of each shipping method. For more information, see "Customer Segments".

The USA and Canada

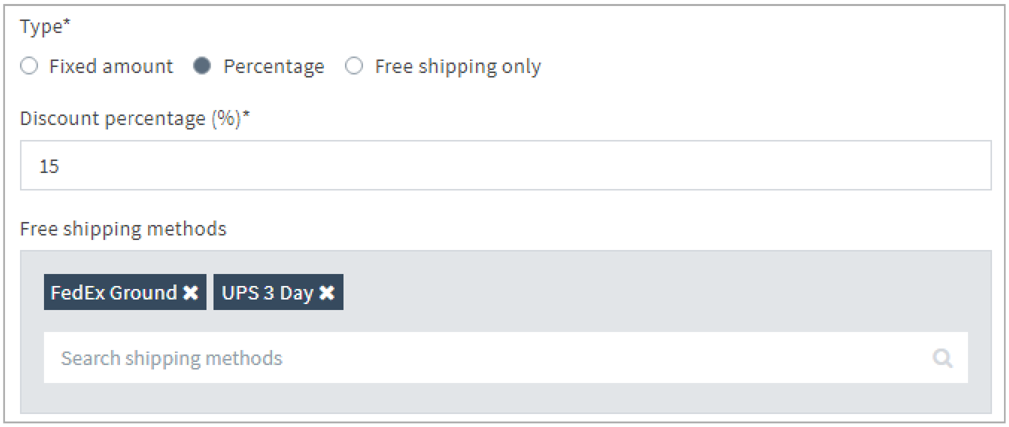
If you set up shipping methods for the USA or Canada, then near the **Country** field, you can see the **Configure states** button. As a web store administrator, you can set up shipping costs per state because the shipping cost from one state to another may differ. This increases flexibility and accuracy as the shipping costs are configurable on the level of a geographical state within a country.

Free shipping discount code

You can create a discount code which enables free delivery for a certain shipping method, and you can also provide both, free delivery and a discount on the total order amount.

Scenario 1

You can set up fixed amount or percentage discount and add free shipping methods. When a customer applies such discount code, he or she gets a discount on the total order amount and can select a shipping method with free delivery.



Scenario 2

You can create a discount code of the type **Free shipping only** and add **Free shipping methods**. This discount code does not give a discount on the total sales order amount, but enables free delivery for the selected shipping methods.

NOTE

When a customer places an order and it does not match the configured shipping cost conditions, for example by customer's shipping address, order total or order weight, the shipping method will not be shown to the customer.

When the shipping methods are created, you can sort them simply by dragging and dropping in the list. In the webstore the shipping methods are shown in the order determined in Sana Admin. The cheapest shipping method is selected by default.

Translate shipping method names

On the **Shipping methods** tab, you can also select any available language in the dropdown and provide the names of the shipping methods in the selected language. When you translate the shipping methods name into any language, you can also change the icon of the shipping method and inherit from the source shipping method or specify internal page or external URL with some additional information.

See also:

Shipping

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Payments

NOTE

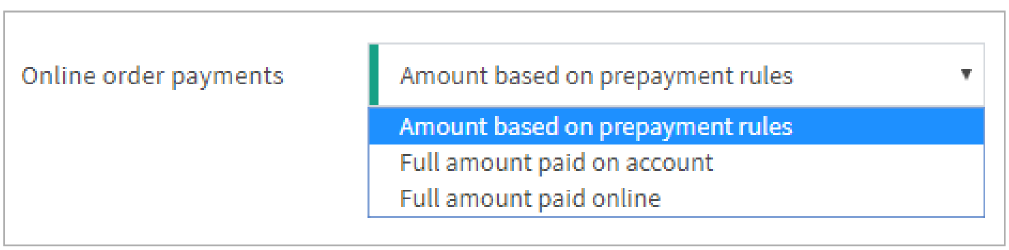
European legislation on payment services (PSD 2 applicable since January 2018) may restrict the use of payment charges for specific payment methods. You can find more information here.

Choosing the right payment type or payment provider for your business is one of the most important decisions you make when setting up your web store. You can choose a payment gateway that Sana integrates with to accept payments online, or you might want to consider offline payments, such as "on account". There is no limit of how many payment methods you can set up, but availability of different payment types can depend on the customer type (B2C and B2B) and ERP system.

When placing an order in the Sana web store, customers can pay:

- **Full sales order amount online with a credit/debit card through a payment gateway**. This payment type is available to B2C and B2B customers. B2C customers always pay with their credit or debit card online through a payment gateway.
- **Full sales order amount on account**. This payment type is available only to B2B customers and sales agents. B2C customers cannot pay on account.
- **Partially online based on prepayment % with a credit or debit card through a payment gateway and the remaining amount later**. This payment type is available only to B2B customers. Prepayments are only supported by Microsoft Dynamics 365 Business Central, Microsoft Dynamics NAV, SAP ECC and SAP Business One.

You can select the necessary payment type for your B2B customers in Sana Admin: **Setup** > **Ordering & checkout** > **Ordering**.



For B2C customers there is no option where you can select a payment type as B2C customers always pay with their credit/debit card online through a payment gateway. Therefore, you must install the necessary payment provider and set up the payment methods.

Online payments through a payment gateway

All online payment methods supported by Sana rely on third-party payment service providers to process your customers' payment transactions. These payment service providers might enforce different requirements about supported countries, currencies and languages, customer and product data, security, etc.

Before you go live and take your first order, you need to decide what payment methods and services you want to use, and then set up them for your web store so that your customers can choose the preferred payment method at checkout. To choose the correct payment service provider and payment methods, first make sure that you understand their requirements. To help you with this, download the Microsoft Excel file called "Supported Payment Providers and Their Requirements". There you will find general information about the payment service providers supported by Sana and their main requirements. For more detailed information, you must refer to the official documentation of the payment service provider you are interested in.

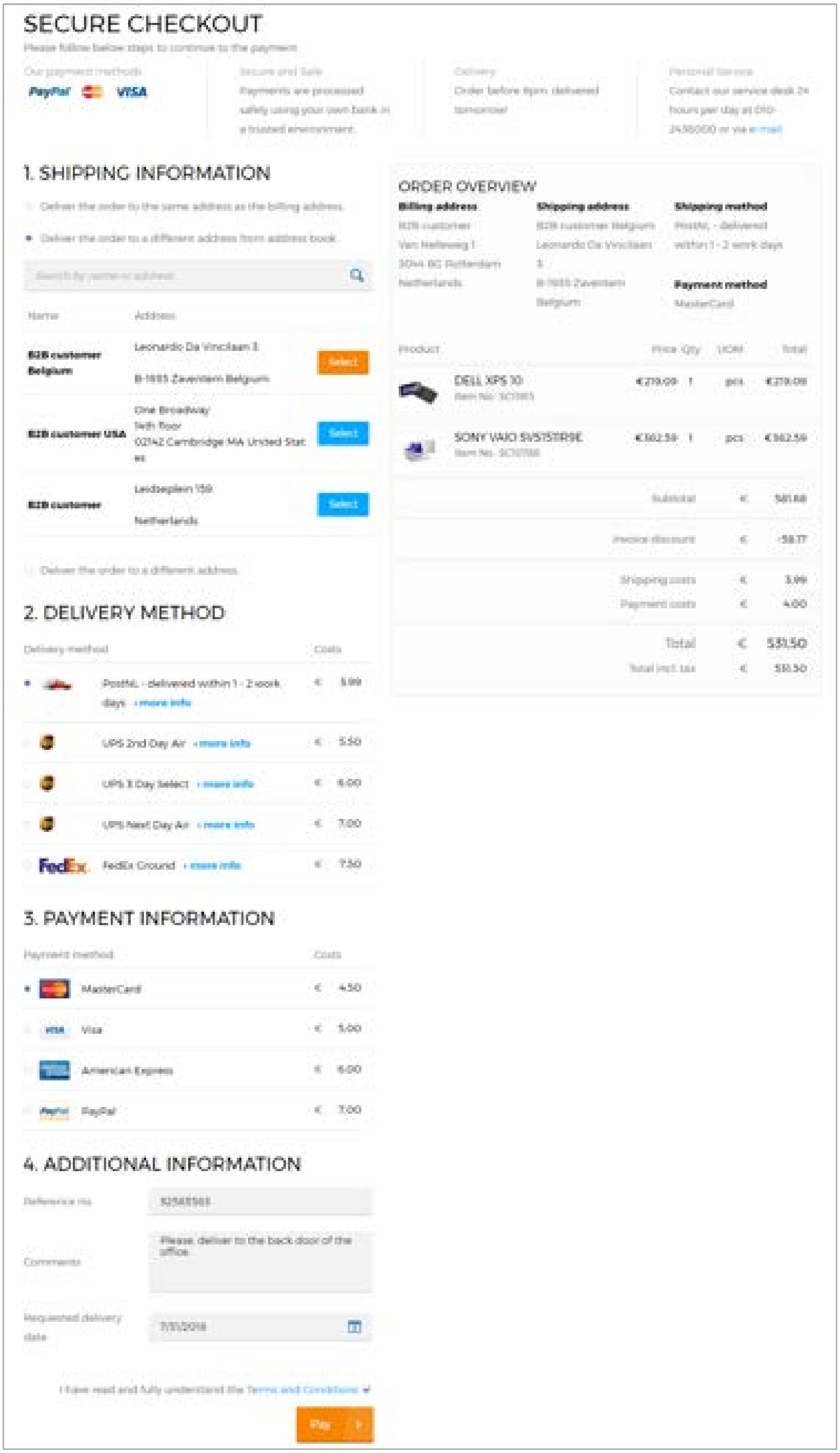
NOTE

The list of payment service providers supported by Sana in the file "Supported Payment Providers and Their Requirements" is not yet complete. We continue to work on it.

Sana integrates with different payment providers across the world, such as PayPal, Adyen, Authorize.Net, Docdata, WorldPay, etc. Not all payment gateways are available to all countries and currencies. Therefore, you must choose the right payment service provider that suits your business. See the complete list of payment providers that are supported by Sana.

A payment gateway is a payment service provider that processes credit/debit card payments online. Sana integrates payment gateways into its system to provide a way to accept payments from the web store customers online. A payment gateway can be integrated into Sana by installing the payment add-on. You can install one or several payment add-ons.

Payment gateways provide different payment methods that your customers can choose from to pay orders, such as Visa, MasterCard, American Express, etc.



Sana supports two scenarios of how your B2B customers can pay their orders online:

- **A B2B customer can pay an order while placing it**. In this case the payment journal is not created in the ERP system and an accountant should handle this manually.

- **A B2B customer can pay one or multiple outstanding invoices**. In this case the payment journal will be automatically created in the ERP system. Online payments of the open invoices from a Sana web store are seamlessly integrated with the sales order processing and cash management modules of the ERP system. This allows to accept credit card payments and have the transactions follow through with the orders to your ERP system. For more information, see "Online Invoice Payments".

There are three main players when it comes to processing credit/debit card transactions:

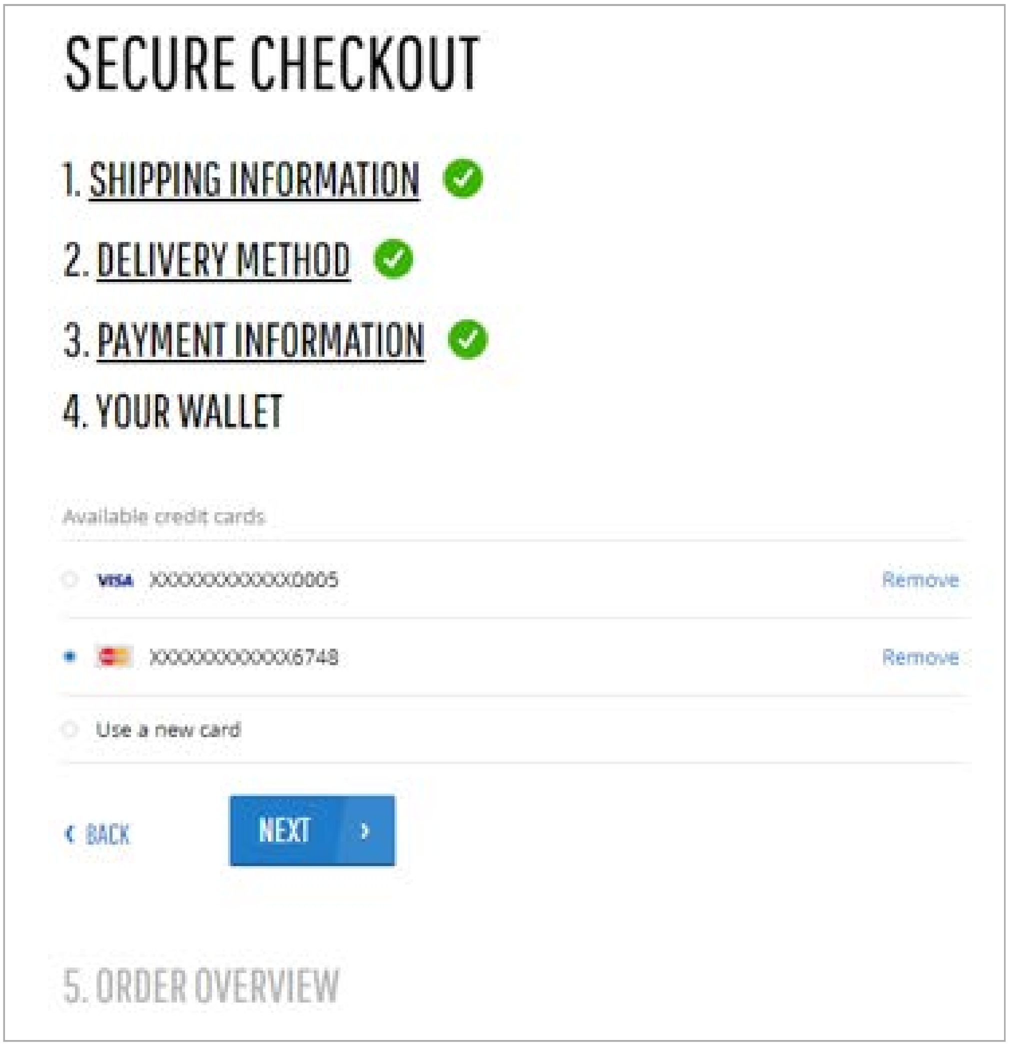
- **You, the merchant**: To accept credit/debit card payments, you need to partner with a bank that will accept payments on your behalf and deposit them on your account.
- **Your customer**: When your customers buy some goods in your web store, they pay with their credit or debit card. Money is transferred from the customer's (issuing) bank account to your (merchant) bank account.
- **Payment gateway**: A payment gateway acts as an intermediary between your business and banks. When a merchant selects a particular payment gateway, he or she will need to connect it to his or her merchant account. A merchant registers an account with the payment gateway to connect it to the Sana web store.

Online payments with an extra checkout step

Some payment providers can store customer's credit card data. This allows a customer not to enter the credit card information again when he or she pays an order. In this case, when a customer goes through the checkout, the additional checkout step will be available in a Sana web store. This step will show customer's credit cards.

Sana web store does not receive or obtain any credit card information. All processing of cardholder data is entirely outsourced to validated third-party service providers. The payment provider that is connected to the Sana web store collects and processes customer's credit card payments on behalf of the Sana web store.

The extra checkout step is supported by Ingenico, PayFabric and MercadoPago payment providers.



In case you do not need to use the extra checkout step, you can disable it in the settings of the payment methods in Sana Admin. Then, a customer will be redirected to the hosted payment page to process the order and complete the payment.

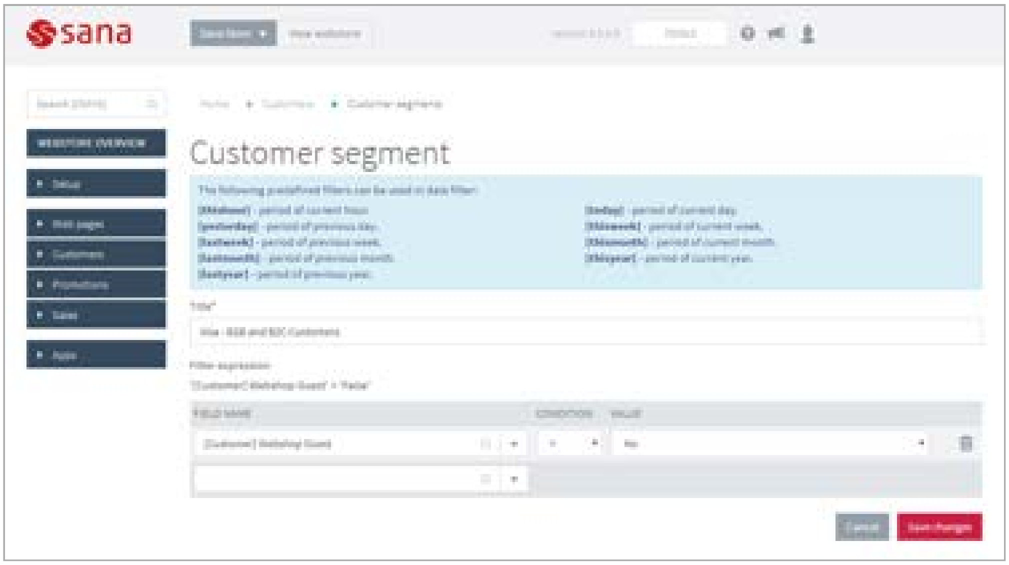
The extra checkout step is available for all customer types: B2B, B2C and guest customers who create orders without registration in the Sana web store.

If you allow guests to place orders without registration in your web store, we do not recommend to allow guests to pay with the extra checkout step for security reasons. To avoid it, you can create separate payment methods for different types of customers, for example with the enabled extra checkout step for B2C and B2B customers and disabled for guests. Then, you can create one customer segment for guests and another one for B2C and B2B customers and assign them to the appropriate payment methods.

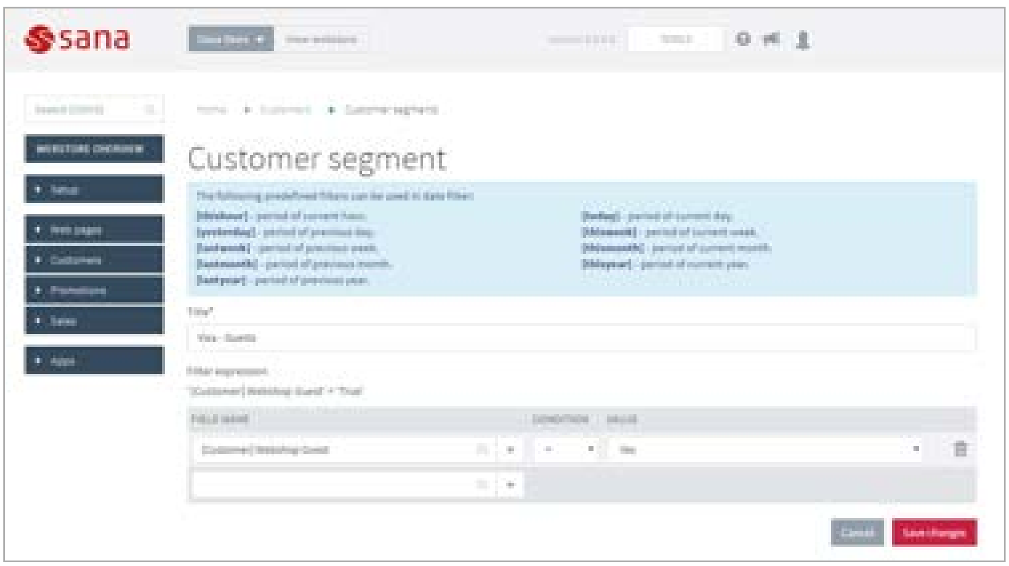
For example, you have created one Visa payment method with the enabled extra checkout step for B2C and B2B customers and another Visa payment method with the disabled extra checkout step for guests.

Then, you need to create a customer segment for each payment method. See the examples below.

A customer segment which excludes guest customers and should be assigned to the payment method with the enabled extra checkout step. The payment method will be available only to B2B and B2C customers.



A customer segment which includes only guest customers and should be assigned to the payment method with the disabled extra checkout step. The payment method will be available only to guest customers.



How online payment transactions are processed

For customers, the entire checkout process takes seconds, but it is important to understand exactly how money moves from your customers to you.

When a customer pays for an order using a credit or a debit card, the payment must be processed before the funds are transferred to your merchant account. Therefore, there is usually a delay between the moment when the **customer pays** for the order and when the **merchant receives** the payment. It can take a few days. Credit card payment processing is automatically done on behalf of a merchant by the payment provider.

Here is how the payment transaction occurs:

1. Your customer buys a product in your web store and pays for an order with a credit or debit card by selecting the appropriate payment method.

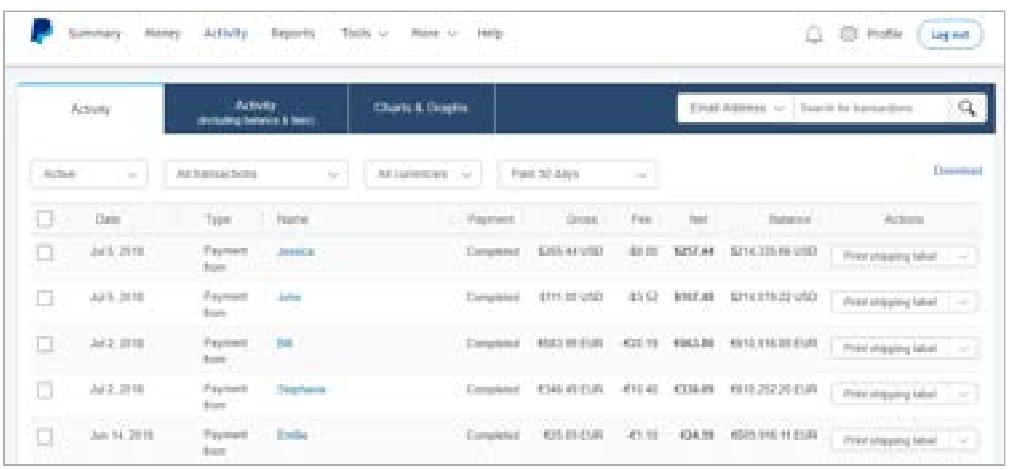
2. When the customer clicks "Pay", he or she is redirected from the web store to the payment service provider page to enter payment information, such as credit/debit card number and CVC.
3. The payment information goes to the payment gateway, which encrypts the data to keep it private.
4. The payment provider processes all required interactions with the customer's credit/debit card issuing bank and returns the payment details back to the Sana web store, such as payment status. The customer is redirected back to the web store and can see the order details.
5. When the transaction is settled by the customer's issuing bank, the merchant will receive funds on his or her bank account.

The actual money transaction is handled by a process called "capturing". When a customer pays the order with his or her credit/debit card, the payment provider checks with the customer's issuing bank whether the credit/debit card is valid. If the card is valid and has enough funds to pay the order, then the customer's issuing bank authorizes the payment. After the payment is authorized, it has to be captured. When a payment is captured, it will be sent to the merchant's bank account. In many cases the capturing is accomplished automatically.

Depending on the payment provider you are using, payment processing can slightly differ. Some payment providers also support delayed capturing of funds until a later time, for example until the order is delivered to the customer.

All payment transactions coming from a Sana web store through the payment service provider can be seen in the administration panel of the payment provider you are using. In most cases, Sana sends the Payment Transaction ID to the PSP, when the customer pays for the order from the web store. Sana automatically generates the Payment Transaction ID which is stored with the sales order in the ERP system. Depending on the PSP you are using to receive credit card payments from your customers, Sana sends either the Payment Transaction ID or the Order ID. The Payment Transaction ID or the Order ID can be used to check the transaction details and payment information in the payment system.

On the screenshot below you can see payment transactions in the PayPal administration panel as an example.



On account payments

Only B2B customers and sales agents can pay their orders on account. B2C customers always pay online with a credit or a debit card through a payment gateway.

Using the "on account" payment type, B2B customers do not select any payment method. When a B2B customer buys something on account, it is charged to his or her credit account, and the merchant will invoice the customer for it later. How B2B customers pay for bills depends on the agreements they have with a merchant. These can be offline payments outside of your online checkout, such as check, bank transfer, or even cash. Using the "on account" payment type, you can also disable direct online payments for sales orders during checkout and allow your B2B customers to pay their outstanding invoices online with a credit/debit card through a payment gateway.

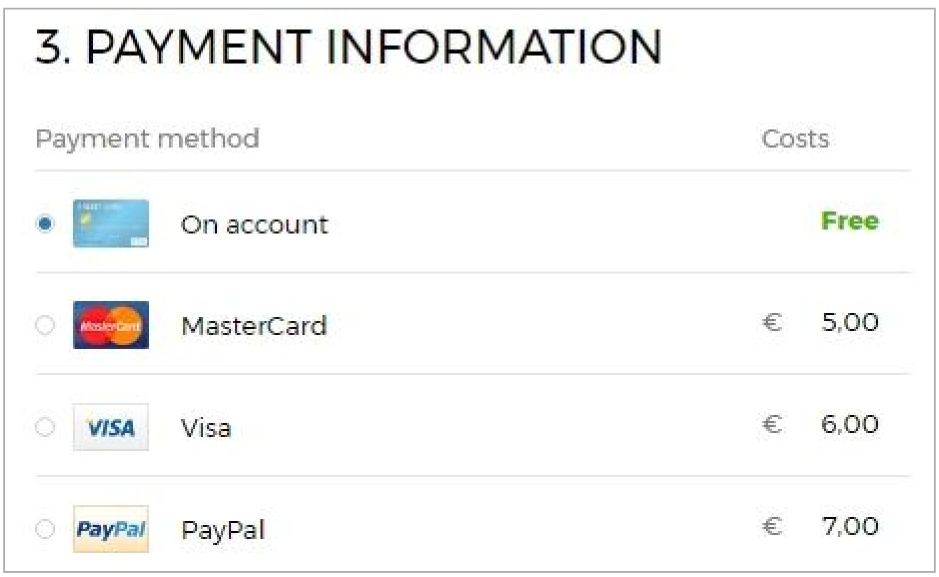
What is the "Internal (on account)" payment method?

There is the "**Internal (on account)**" payment method in Sana. This is a system payment method and it has nothing to do with the "on account" payment type which is available to B2B customers and sales agents.

It is used mainly for testing purposes. For example, when you install Sana and if you do not have some payment service provider installed yet, you can use the "Internal (on account)" payment method to test the checkout process for B2C customers. As B2C customers pay online through the payment gateway, you need either to install some payment provider and set up payment methods or you can use the "Internal (on account)" payment method to simulate online payments and test the checkout flow.

You can create the "Internal (on account)" payment method and set up the payment costs just like any other payment method. The only difference from the real online payments that it is not connected to any payment gateway. This payment method is shown to the customers during checkout and they can select it like any other payment method.

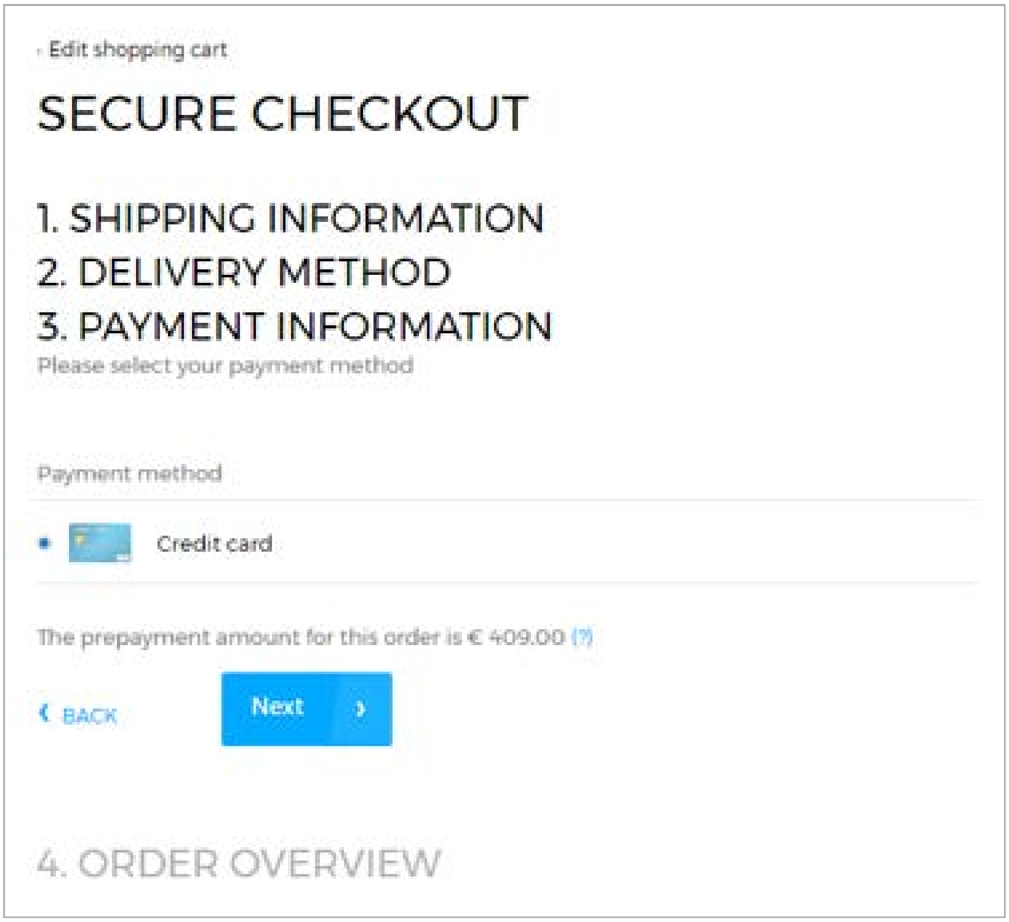
If you enable online payments for B2B customers, you can also show the "Internal (on account)" payment method to your B2B customers.



Prepayments

Prepayments are available only to B2B customers, and supported by Microsoft Dynamics 365 Business Central, Microsoft Dynamics NAV, SAP ECC and SAP Business One.

Using this payment type, B2B customers partially pay their orders online with a credit/debit card through the payment gateway. They pay the prepayment amount out of the order total calculated based on the prepayment % set for the customer in ERP. How B2B customers pay the remaining amount depends on the agreements they have with a merchant.



Payment statuses

A payment goes through different stages. These stages define the status of each payment transaction.

Below you can see the available payment statuses, when the order is paid online in the Sana web store.

Payment status	Description
New	When a customer creates an order in the Sana web store and clicks "Pay", the sales order will be created in the ERP system and the customer will be redirected to the payment provider page to enter payment details, such as the credit card number, and to finalize the payment. At this moment the payment status is "New", until the payment is finalized. If a customer does not finalize the payment on the payment page and closes the Web browser or tab, the sales order will remain in the ERP system with the payment status "New".
In progress	Pending confirmation about payment transaction from the payment provider. The payment must be processed before the funds are transferred to the merchant account. Therefore, there is usually a delay between when the customer pays for the order and when the merchant receives the payment. When the payment transaction is successfully completed and the merchant receives money on his or her account, the payment provider will inform Sana to update payment status of the order.
Paid	When Sana receives confirmation from the payment provider that the order has been paid successfully.

The payment status of the orders that are paid on account by B2B customers and sales agents is always "Paid". That is because using the "on account" payment type, B2B customers do not pay online through a payment gateway while placing an order. The merchant invoices his or her customers later and receives funds based on the agreements between two parties.

The payment statuses of the orders that are paid partially based on the prepayment % of a B2B customer are the same as for the orders that are paid fully online. For example, if 10% prepayment of the total sales order amount is required, and that 10% prepayment has been paid successfully, the payment status will be "Paid". B2B customers pay the remaining amount depending on the agreements they have with a merchant.

Cancelled payments

Not all customers complete their orders. This leads to accumulation of the unnecessary data in the ERP system - cancelled orders. When a customer cancels the order payment on the payment provider page for some reason, the sales order will be automatically removed in the ERP system. Sales orders that are removed in the ERP system are not shown to the customers in the order history.

NOTE

In SAP ERP you can activate and deactivate deletion of the cancelled sales orders. Moreover, the cancelled sales orders in SAP can be deleted either permanently or temporary. For more information, see "Delete Orders".

Payment confirmation e-mails

Sana sends various payment confirmation e-mails in different scenarios.

E-mail	Description
Sales orders	
Order confirmation	The order confirmation e-mail is sent to the customer when the order has been placed and paid successfully. When the order is paid from the payment provider page and the customer is redirected back to the Sana web store, the order confirmation e-mail will be sent.
Invoices	
Invoice payment confirmation	The invoice payment confirmation e-mail is sent to the customer when the invoice has been paid successfully. Only B2B customers can pay their outstanding invoices from the invoice history which can be accessed from the "My Account" page. They can pay their invoices independently from placing the orders. When the invoice is paid from the payment provider page and the customer is redirected back to the Sana web store, the invoice payment confirmation e-mail will be sent.
Invoice payment confirmation for shop managers	The invoice payment confirmation e-mail is sent to the web store administrator when the invoice has been paid successfully by the customer.
Invoice payment partial success	This e-mail is sent to the web store administrator, if something has gone wrong with invoice payment. For example, payment transaction has failed, or a customer paid the invoice from a Sana web store, but the

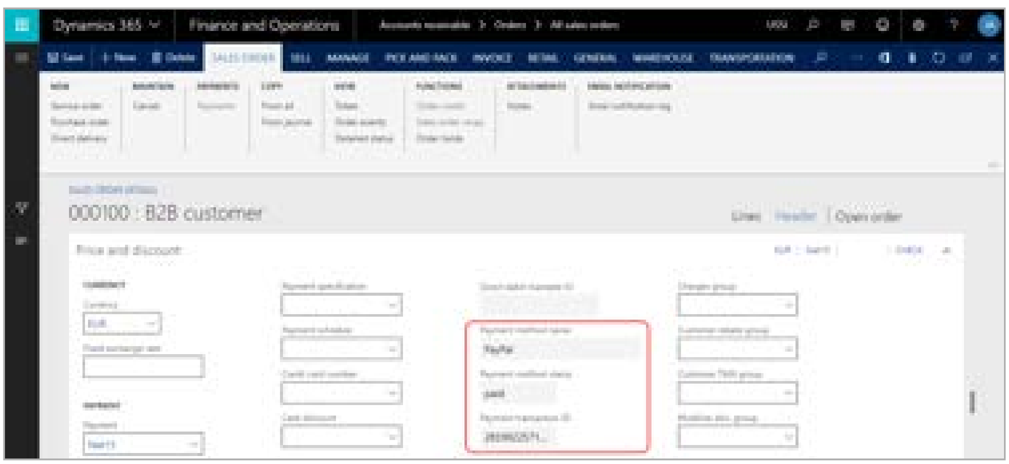
	payment journal was not created in the ERP system due to the wrong setup of the payment account in ERP. Such situations should be manually checked and handled by the web store administrator.
Unprocessed orders (created in the maintenance mode)	
Order payment	The order payment e-mail is sent to the customer when the order has been processed in Sana Admin. In this e-mail the customer can see the order details with actual prices and proceed to the payment page.
Payment confirmation	The payment confirmation e-mail is sent to the customer when the order has been paid successfully. When the order is paid from the payment provider page and the customer is redirected back to the Sana web store, the order confirmation e-mail will be sent.

For more information, see "Online Invoice Payments" and "Unprocessed Orders".

Payment information in ERP

All sales orders created by the customers in the Sana web store are stored in the ERP system. There you can see all order details including payment information, such as payment method that was selected by the customer to pay the order, payment method status and payment transaction ID.

On the screenshot below you can see payment information of the sales order in Microsoft Dynamics 365 for Finance and Operations as an example.



To find payment information in your ERP system, see the related topics:

Sales Order Data in Microsoft Dynamics NAV

Sales Order Data in Microsoft Dynamics AX

Sales Order Data in Microsoft Dynamics GP

Sales Order Data in Microsoft Dynamics 365 Business Central

Sales Order Data in Microsoft Dynamics 365 for Finance and Operations

Sales Order Data in SAP Business One

Sales Order Data in SAP ECC

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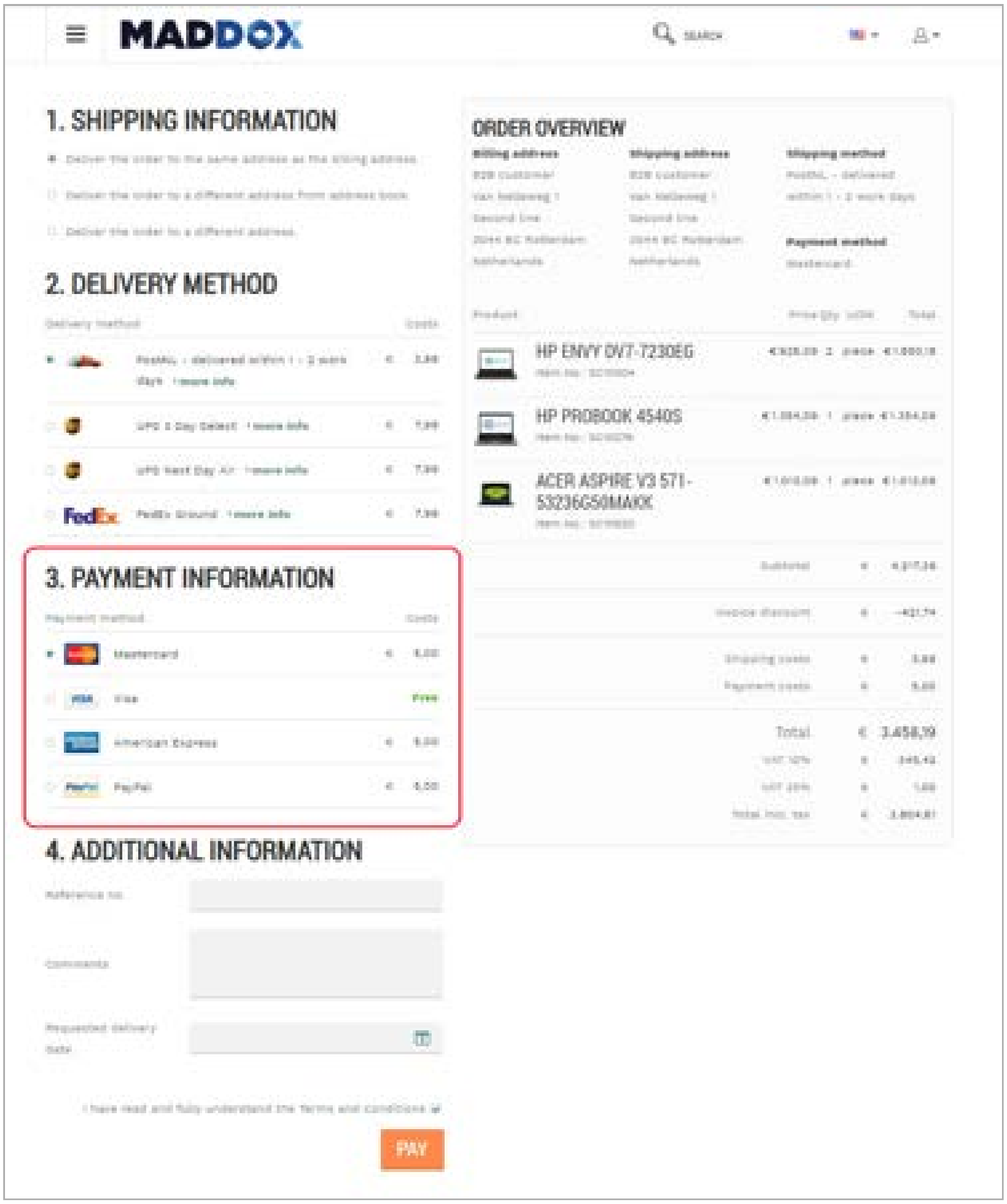
Payment Methods

Watch the video

NOTE

European legislation on payment services (PSD 2 applicable since January 2018) may restrict the use of payment charges for specific payment methods. You can find more information here.

For a store owner, choosing a **payment service provider** (PSP), online service for accepting electronic payments by a variety of payment methods including credit and debit cards, is an important decision.



Read the article "Payments" to learn about all payment types supported by Sana and payments logic.

In Sana Admin click: **Setup** > **Ordering & checkout** > **Payment methods**.

On the **Payment methods** tab you can create different payment methods and connect them to the payment provider you are using.

Payment provider is a service that allows to accept credit/debit card payments securely online through your web store.

Sana connects to different payment providers across the world. All payment providers are available as add-ons which you can install in your Sana web store. To check all payment providers supported by Sana, see "Payment Services".

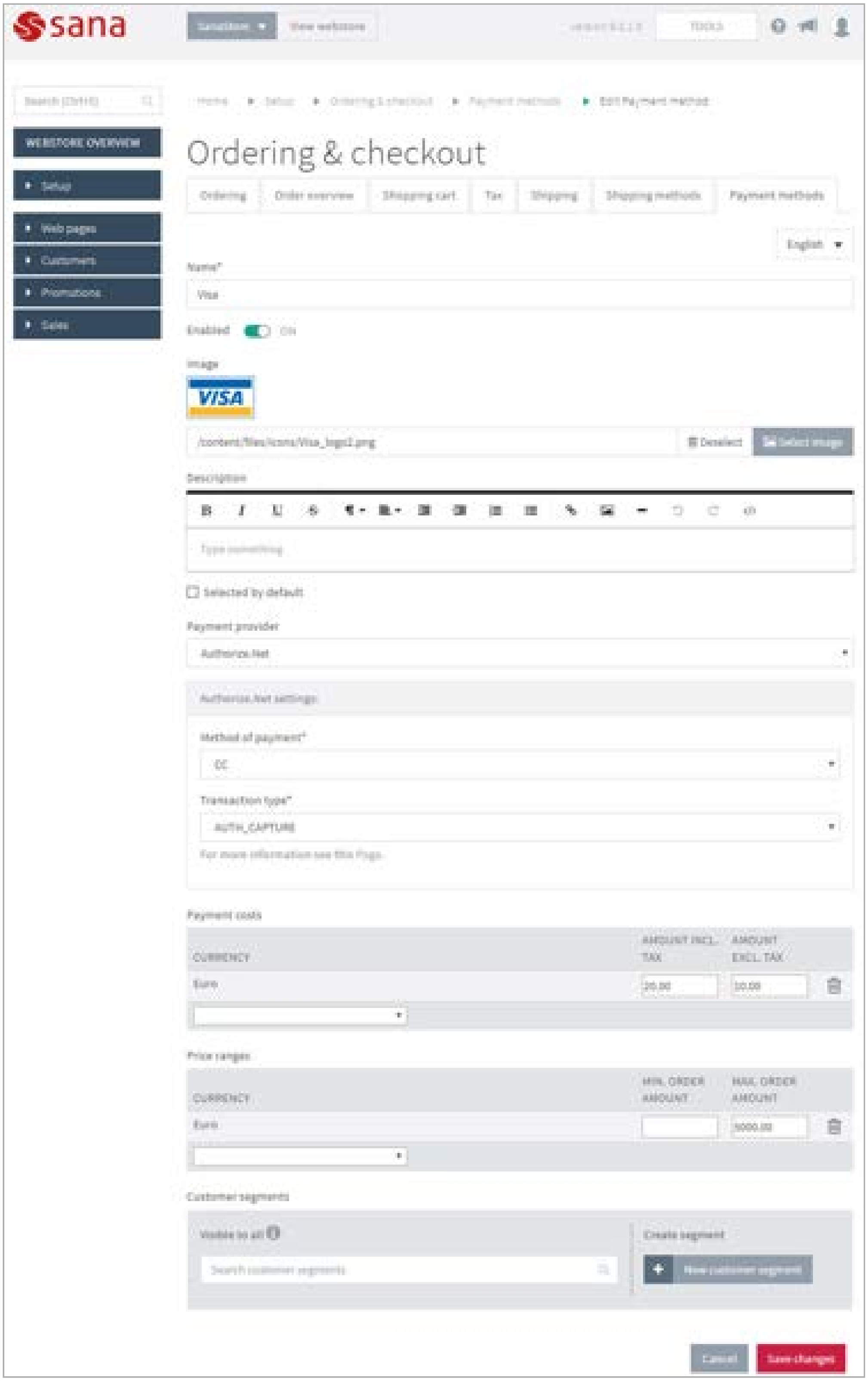
You must have an account (test / live) of the payment provider that you will use with all the necessary data, configure and enable the payment provider in Sana Admin and create payment methods that are supported by your payment provider.

Create a payment method

Step 1: In Sana Admin click: **Setup** > **Ordering & checkout** > **Payment methods**.

Step 2: Click **New item** to create a payment method.

Configuration of the payment methods is almost the same for any payment provider. The only difference is in the **Payment provider** field and payment provider specific settings.



The table below provides the description of the general payment method fields.

Field	Description
Name	Enter the payment method name.

Enabled	Enable or disable payment method. Payment methods can be also enabled or disabled in the payment methods list.
Image	Select the payment method icon. It is shown in the Sana web store on the **Payment information** checkout step, near the payment method name.
Description	You can add a description to the payment method. Payment method description is shown in the Sana web store on the **Payment information** checkout step, near the payment method name. Payment method description is not shown when **One step checkout** is enabled.
Selected by default	If this checkbox is activated, this payment method will be selected in the web store by default.
Payment provider	Select your payment provider. Some of the payment providers contain the additional settings that may appear.
Payment costs	Set up the payment costs per currency. Select the currency and enter amount including and excluding tax. Depending on the customer setting in your ERP system (Prices including VAT/TAX) the appropriate amount will be used. If payment cost is 0, the text "**Free**" will be shown, meaning that no extra fee is charged for online payment. The color of the text is green by default, but you can change it in the web store theme settings.
Price ranges	Set up the price ranges per currency. Select the currency and enter the minimum amount or maximum amount, or set the amount range. Different payment service providers (PSP) have their own rules and limitations. Some PSPs limit the order amount that can be transferred from a customer to a merchant. For all orders below the minimum amount and above the maximum amount (outside the configured range), the payment method will not be shown on the **Payment information** checkout step in the Sana web store. These settings are optional.
Customer segments	Assign customer segments. Using customer segments you can filter payment methods. If you add a customer segment to the payment method, then this payment method will be available only to the customers that meet the criteria set in the customer segment. Other customers will not see this payment method. This way you have more flexibility in setting up availability of different payment methods based on various data from Sana and ERP, for example country, customer's balance, payment terms, etc. For example, if you create a customer segment which includes customers from the United States and assign this customer segment to a payment method, then only the customers from the United States will be able to pay orders using this payment method in the Sana web store.

	If you assign a customer segment to a payment method, then you will see the icon on the **Payment methods** page. This way a user can see an overview of all payment methods on a page to which customer segments are assigned and don't need to check the settings of each payment method. For more information, see "Customer Segments".

While placing an order in the Sana web store a customer can select delivery method, payment method, add reference number and comment. Once the order is placed, all this data will be saved to the sales order in the ERP system. For information on where you can find this sales order data in ERP, see:

- **Microsoft Dynamics NAV**: Sales Order Data
- **Microsoft Dynamics AX**: Sales Order Data
- **Microsoft Dynamics GP**: Sales Order Data
- **Microsoft Dynamics 365 Business Central**: Sales Order Data
- **Microsoft Dynamics 365 for Finance and Operations**: Sales Order Data
- **SAP Business One**: Sales Order Data
- **SAP**: Sales Order Data

NOTE

There are two system payment methods in Sana: "**On account**" and "**Zero**". These payment methods are not shown in Sana Admin and it is not possible to edit them.

The "**On account**" payment method can be used by B2B customers if this option is enabled in Sana Admin: **Setup** > **Ordering & checkout** > **Ordering** > **Online order payments**.

The "**Zero**" payment method is used automatically when the total cost of an order is equal to 0.

There is also the **Internal (on account)** payment provider that is not configurable in Sana Admin, but it can be enabled or disabled. Unlike the system on account payment method you can create and configure payment methods with the assigned "Internal (on account)" payment provider. The payment method of the "Internal (on account)" payment provider is shown in the web store and can be selected by a customer.

Translate payment method name

On the **Payment methods** tab, you can also select any available language in the dropdown list and enter the names of the payment methods in the selected language. When you translate the payment method name to any language, you can also change the icon of the payment method.

Payment Transactions

General

Sana supports a wide range of payment service providers (PSP) that offer merchant services in all parts of the world. Payment service providers make it possible to accept credit card payments directly from your web store. They fulfill a vital role by authorizing payments between the merchant and the customers.

Each online payment requires your data to be passed through a PSP. When a customer goes through your store's checkout, he or she will need to choose a payment method to pay for an order. When the order is paid by the customer, the payment transaction is sent to the PSP. The payment must then be processed. Online payments are processed for you by your PSP. After this the purchase amount will be transferred to your merchant account.

Payment Transaction ID or Order ID

All payment transactions coming from the Sana web store through the payment service provider can be seen in the payment system of the PSP you are using. In most cases, Sana sends the Payment Transaction ID to the PSP, when the customer pays for the order from the web store. Sana automatically generates the Payment Transaction ID which is stored with the sales order in the ERP system. Depending on the PSP you are using to receive credit card payments from your customers, Sana sends either the Payment Transaction ID or the Order ID. This is not configurable. The Payment Transaction ID or the Order ID can be used to check the transaction details and payment information in the payment system.

Several payment transactions can be sent to the PSP when the customer pays for the order from the web store. For example, if the first payment transaction has failed due to some reason, the customer can try to pay for the order again or choose another payment method. In this case, another Payment Transaction ID will be sent to the PSP and will override the Payment Transaction ID in the sales order in ERP. Sana always stores the latest Payment Transaction ID with the sales order in ERP.

Below you can see which payment references you can use to track the payment transactions coming from the Sana web store to the PSP you are using.

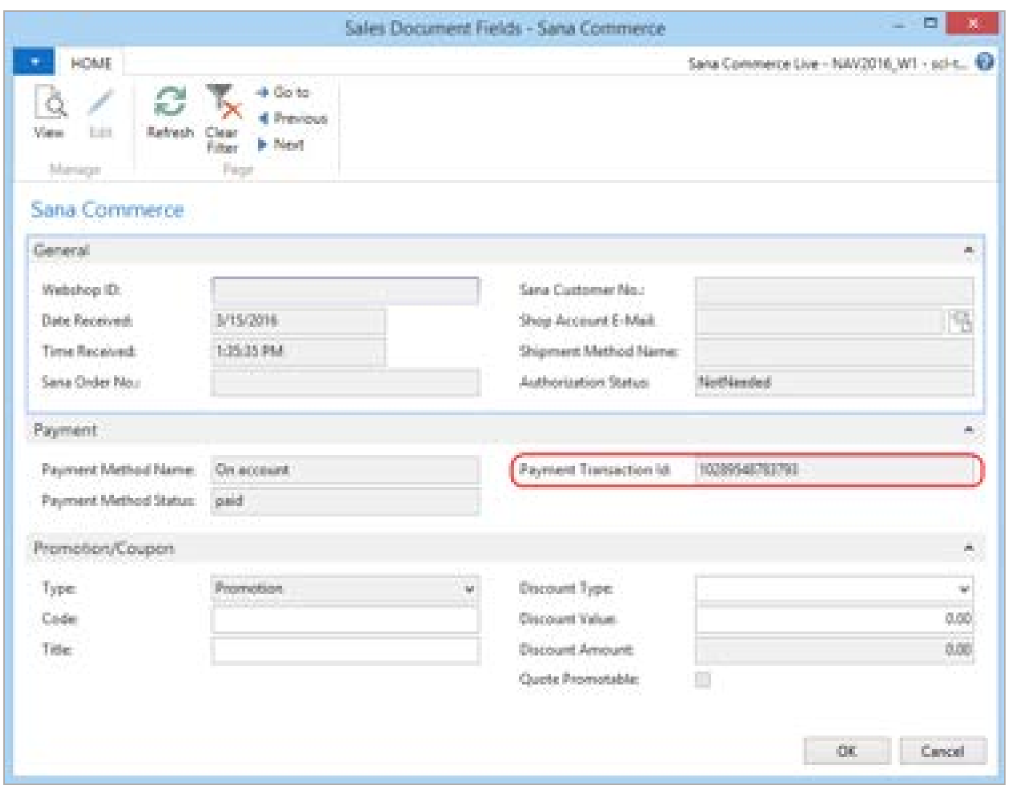
Payment service provider	**Payment reference**
Sana Pay powered by Adyen	Payment Transaction ID
Adyen	Order ID and Payment Transaction ID
Adyen Checkout	Payment Transaction ID
Amazon Pay	Payment Transaction ID
Authorize.Net	Payment Transaction ID
Buckaroo	Payment Transaction ID
ChargeLogic	Document Type and Order ID

CyberSource	Payment Transaction ID
DIBS	Payment Transaction ID and Order ID
Docdata	Payment Transaction ID
EBizCharge	Payment Transaction ID
eWay	Payment Transaction ID
Ingenico	Payment Transaction ID
KBC Paypage	Payment Transaction ID
MercadoPago	Payment Transaction ID
Mollie	Mollie Order ID
PayFabric	Payment Transaction ID
PayPal	Payment Transaction ID
PostFinance	Payment Transaction ID
Sage Pay	VendorTxCode and Payment Transaction ID
WorldPay	Cart ID and Payment Transaction ID

See where to find the payment transaction ID of the sales order in your ERP system.

Microsoft Dynamics NAV

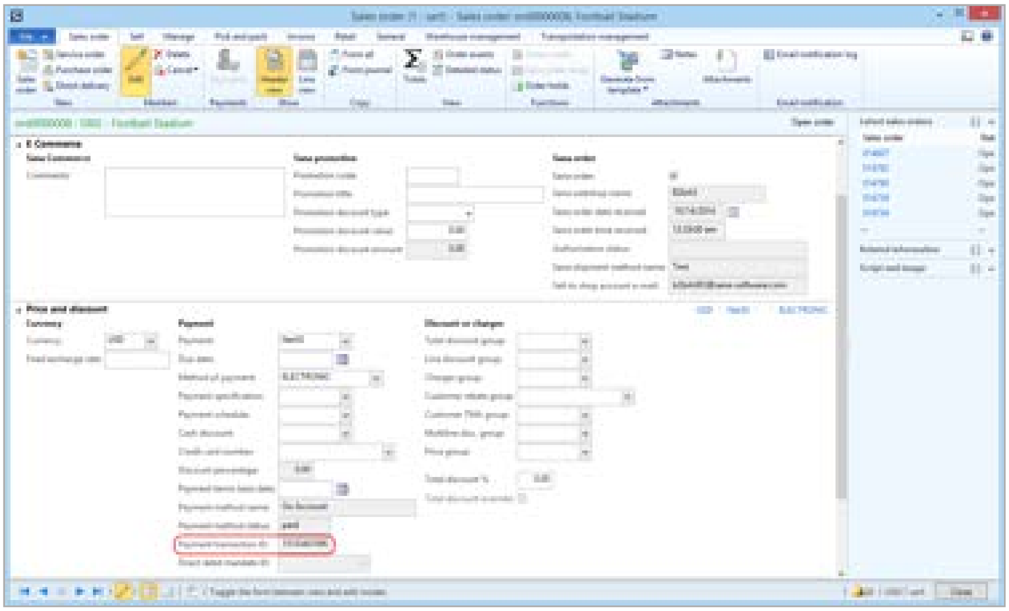
Open the sales order details and click "**Sana Commerce**" at the top of the window. See the "**Payment Transaction Id**" field on the "**Payment**" FastTab.



For more information, see "Sales Order Data".

Microsoft Dynamics AX

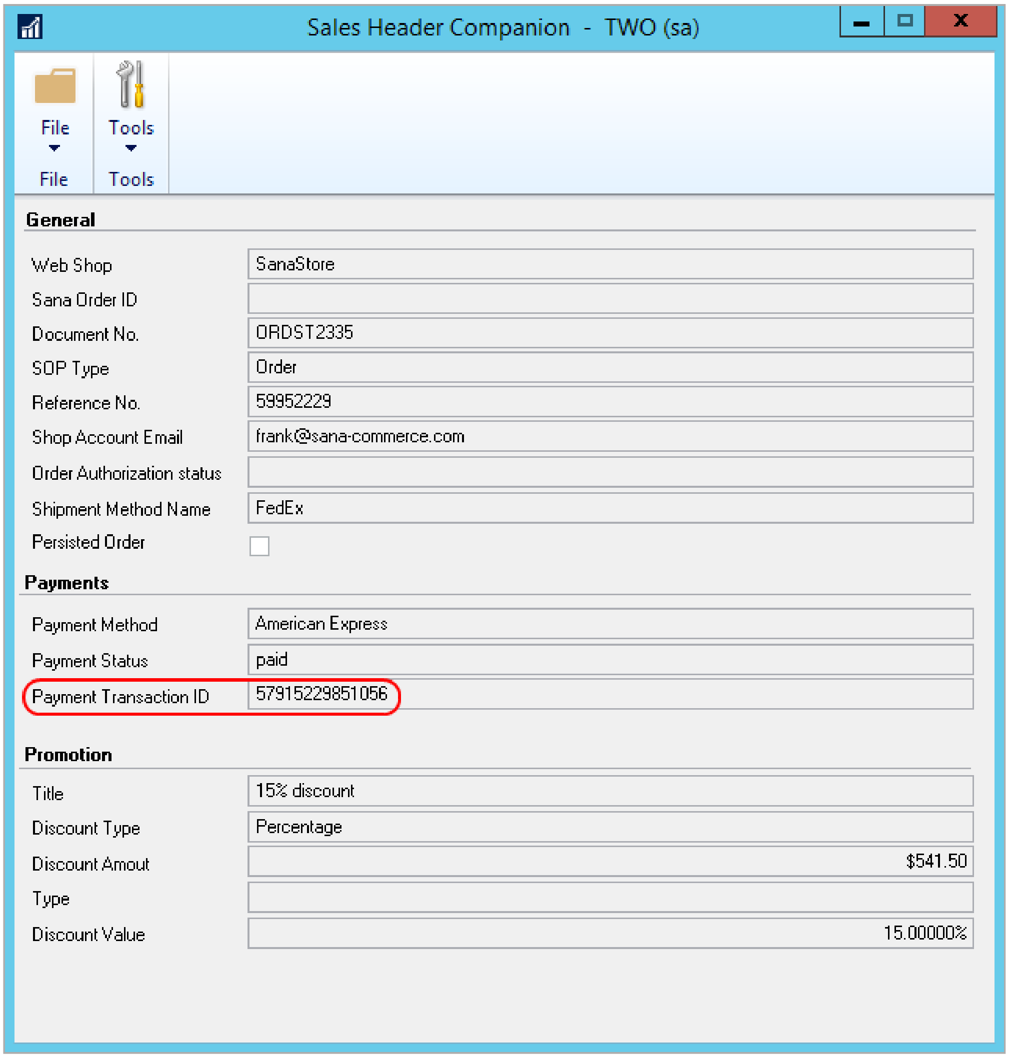
Open the sales order details and see the "**Payment transaction ID**" field on the "**Price and discount**" FastTab.



For more information, see "Sales Order Data".

Microsoft Dynamics GP

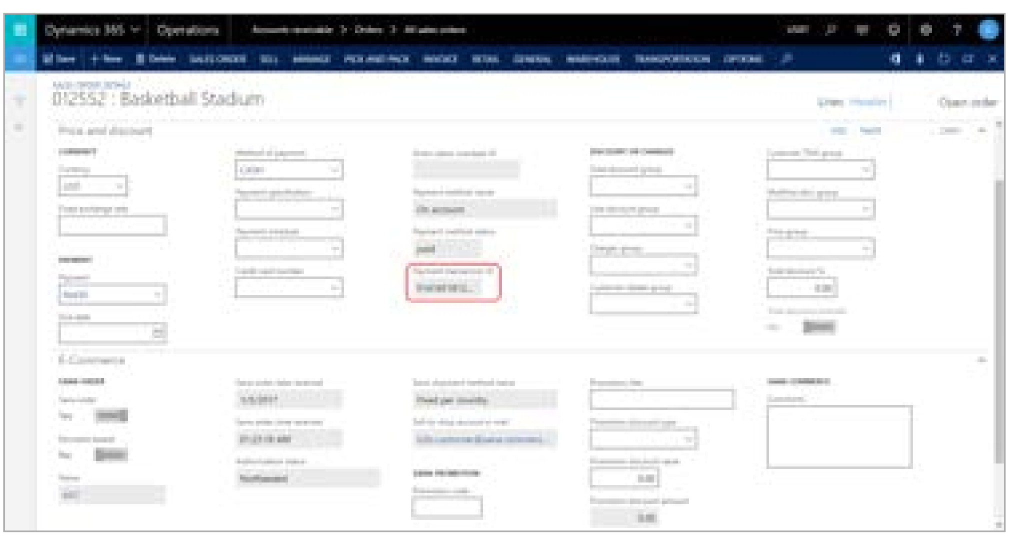
Open the sales order details and at the top of the "**Sales Transaction Entry**" window click: **Additional** > **Sana Commerce**. See the "**Payment Transaction ID**" field in the "**Payments**" section.



For more information, see "Sales Order Data".

Microsoft Dynamics 365 for Finance and Operations

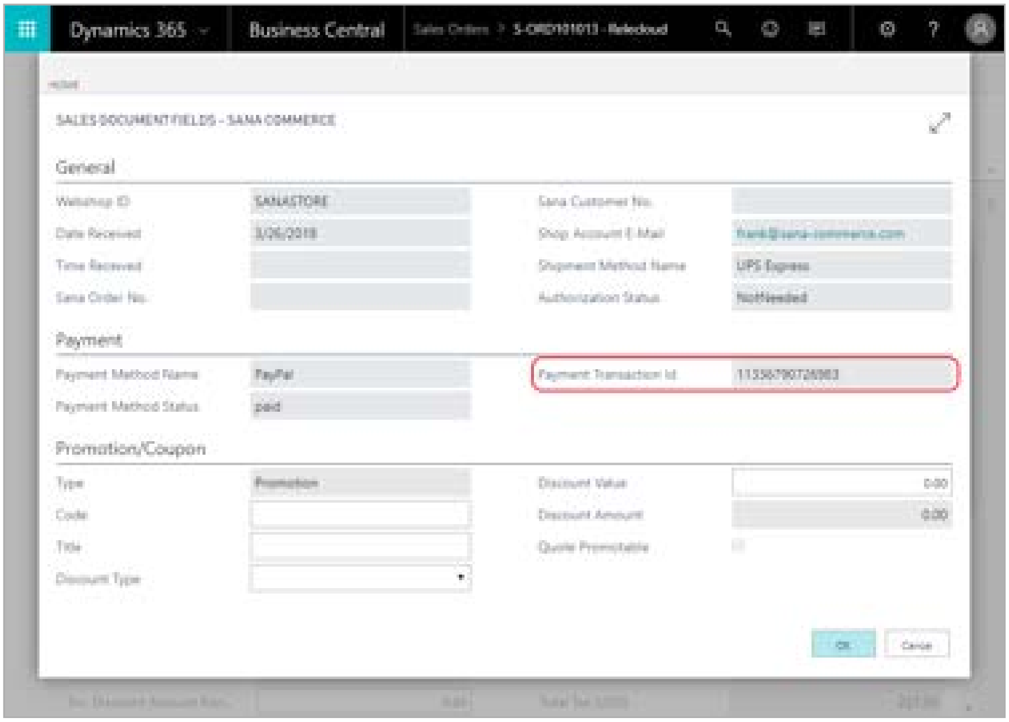
Open the sales order details and see the "**Payment transaction ID**" field on the "**Price and discount**" FastTab.



For more information, see "Sales Order Data".

Microsoft Dynamics 365 Business Central

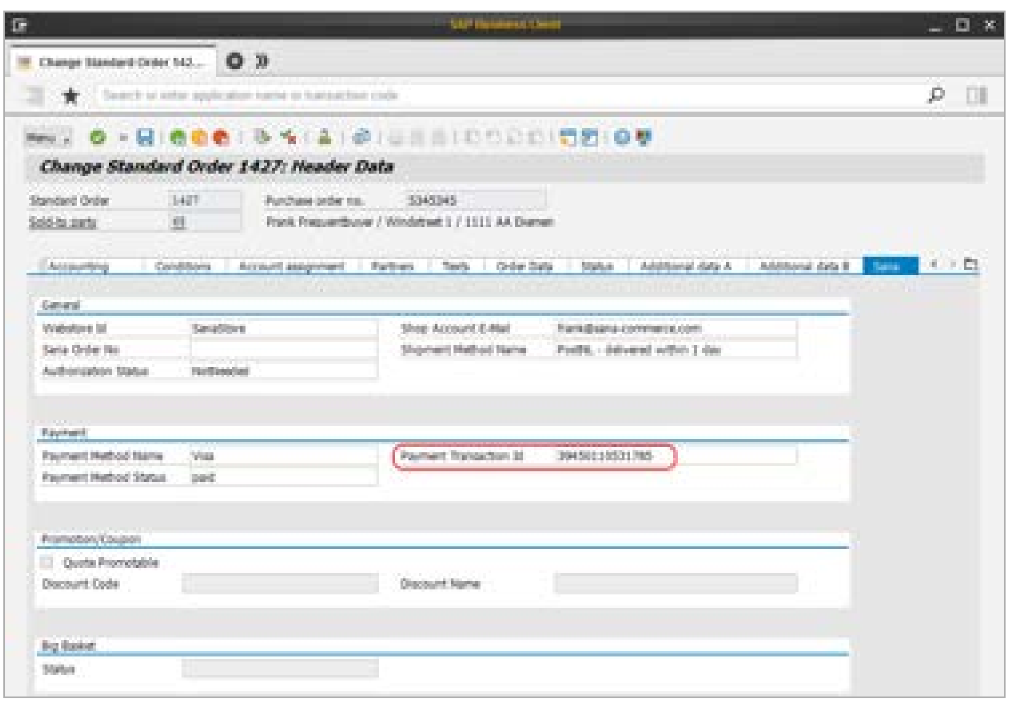
Open the sales order details and on the "**Home**" tab click "**Sana Commerce**". See the "**Payment Transaction Id**" field on the "**Payment**" FastTab.



For more information, see "Sales Order Data".

SAP ECC

Open the sales order header data and on the "**Sana**" tab see the field "**Payment Transaction Id**".

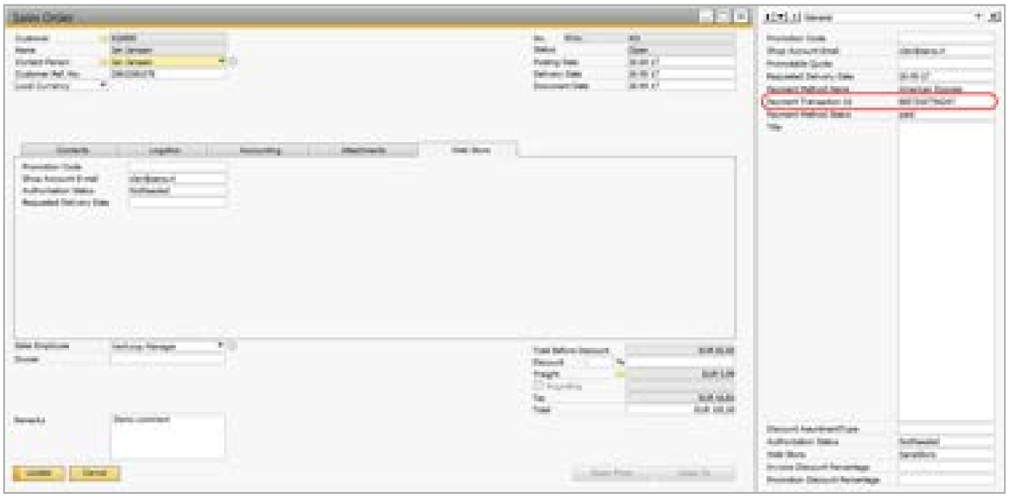


You can also see payment transaction ID for each sales order in the "Orders Overview" window.

For more information, see "Sales Order Data" and "Webstore Orders Overview".

SAP Business One

Open the sales order details and see the "**Payment Transaction Id**" user-defined field.



You can also see payment transaction ID for each sales order in the "Orders Overview" window.

For more information, see "Sales Order Data" and "Web Store Orders Overview".

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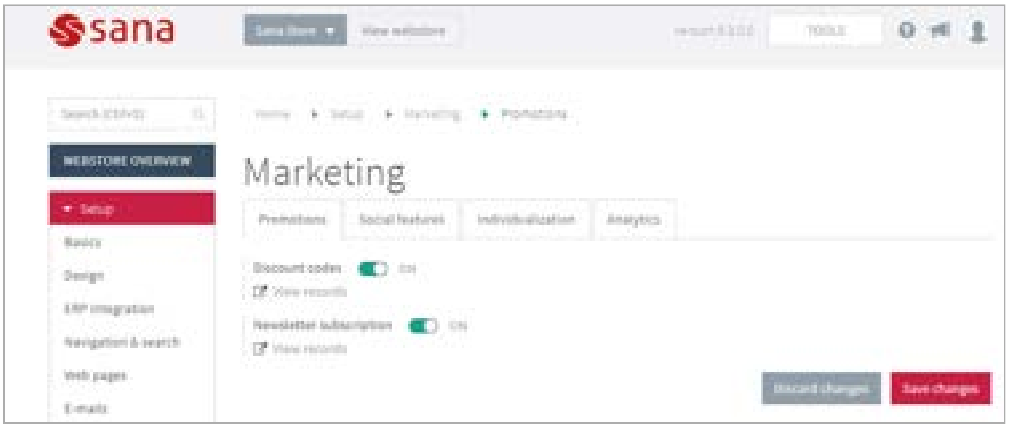
Marketing

Sana Commerce offers a wide range of features that can help you build marketing strategies to increase order totals and revenue.

In Sana Admin click: **Setup** > **Marketing**.

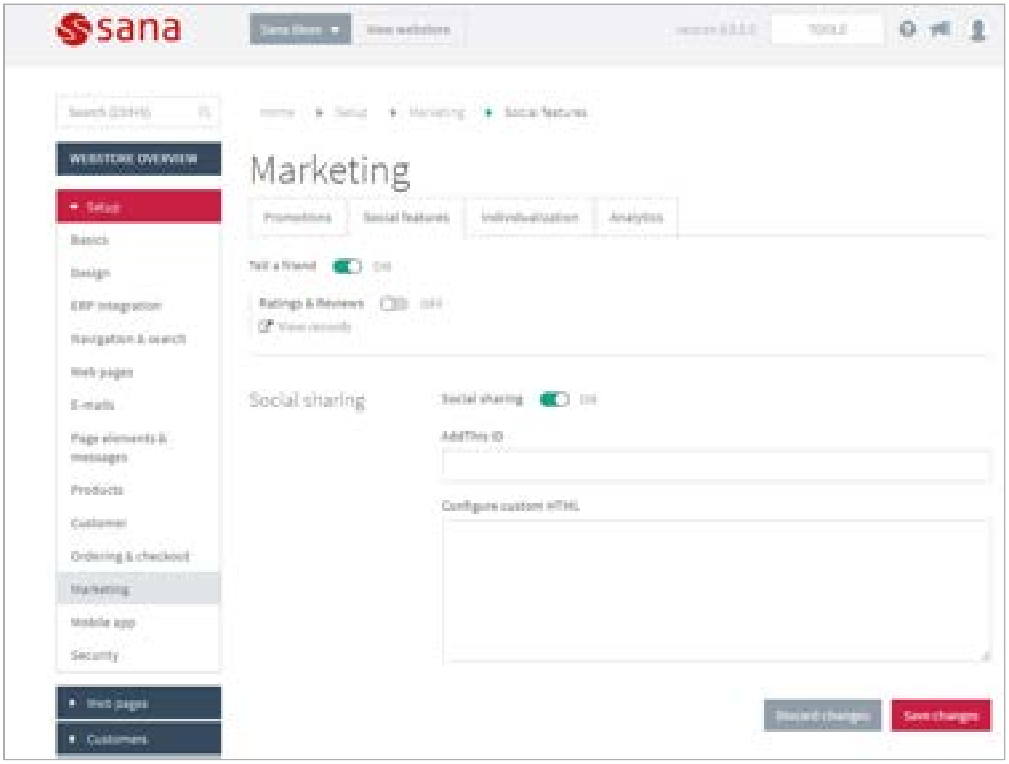
Promotions



The table below provides the description of the settings that can be setup under the **Promotions** tab:

Settings	Description
Discount codes	Use this setting to enable/disable discount codes. Offering discounts is a vital marketing strategy. Discount codes can be generated for a fixed amount and for a percentage discount. To create discount codes in Sana Admin click: **Promotions** > **Discount codes**. For more information, see "Discount Codes".
Newsletter subscriptions	Use this setting to enable/disable newsletter subscriptions. Newsletter subscriptions is a great way to establish relationship with your customers. You can use newsletters to keep your customers updated about some special events and other webstore news. To view/export newsletter subscriptions in Sana Admin, click: **Customers** > **Newsletter subscriptions**. For more information, see "Newsletter Subscriptions".

Social features



The tables below provide the description of the settings that can be setup under the **Social features** tab:

Settings	Description
Tell a friend	Watch the video Use this setting to enable/disable the **Tell a friend** feature. This feature allows a customer to send an e-mail to a friend to share the product the customer is interested in. You can share the product with your friend using the **Tell a friend** feature from the product page in the webstore. The message of the **Tell a friend** e-mail uses the **Check out this product** e-mail template. For more information about e-mail templates, see "E-mails".
Ratings & Reviews	Watch the video Use this setting to enable/disable ratings & reviews. Ratings & Reviews allow customers to easily submit reviews of the products in the webstore. Product reviews are comments submitted by customers or webstore visitors directly on the product page. To manage ratings & reviews in Sana Admin click: **Customers** > **Ratings & Reviews**. For more information, see "Ratings & Reviews".

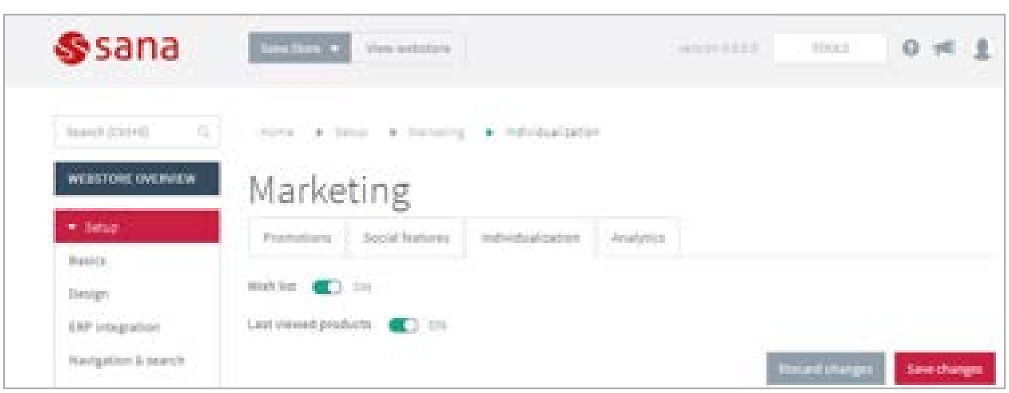
Social sharing

Sana Commerce uses AddThis, the world's largest content sharing and social insights platform, which allows webstore users to share a product with friends using social networks. AddThis supports all major sharing buttons, like Facebook, Twitter, Google+, LinkedIn.

This table provides the description of the **Social sharing** settings:

Setting	Description
Social sharing	Use this setting to enable/disable social sharing. Social sharing control is shown in the webstore on the product details pages, under the product image by default:  In the default AddThis HTML the following buttons are available: • Facebook Like button • Twitter Tweet button • Share
AddThis ID	Your AddThis ID. This ID is required if you want AddThis to gather statistics and track analytics for your webstore.
Configure custom HTML	Use this field for custom AddThis HTML to add any sharing and social buttons. You can just copy the code from the AddThis web site, and in the code, change the position of the social sharing control on the product details page. If AddThis is enabled and the custom HTML is empty, then the default AddThis HTML will be used.

Individualization



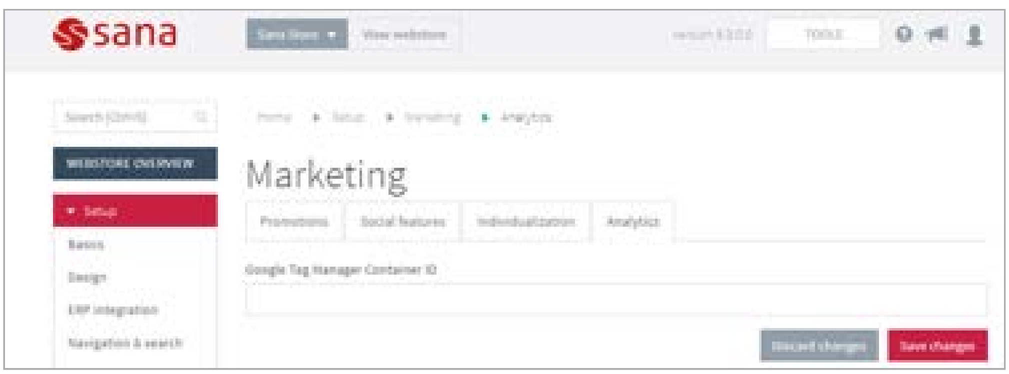
The table below provides the description of the settings that can be setup under the **Individualization** tab:

Settings	Description

Wish list	Use this setting to enable/disable the **Wish list** feature. This feature allows customers to save products for purchase at a later date. The products can be added to the wish list from the product page in the webstore. The ability to add products to the wish list depends on the selected product details page layout. For more information, see "Page Layouts". A sales agent should represent a customer to be able to add products to the wish list. To access a wish list in the webstore hover over the user icon at the top right corner and click **Wish list**. From the wish list page a customer can either delete products or add to the basket.
Last viewed products	Use this setting to enable/disable the **Last viewed products** feature. Last viewed products can be seen in the webstore at the bottom of the product and product list pages. The list of the last viewed products is cleared each time the web browser is closed.

Analytics

Watch the video



Google Tag Manager (GTM) is a free tag management tool developed by Google. Through this web tool you can deploy and manage various marketing and analytics tags on a website which are used to track and gather all kind of statistics from your website.

Google Tag Manager allows to easily manage your online business, saving your time and bringing more profits.

For the detailed information, see "Google Tag Manager".

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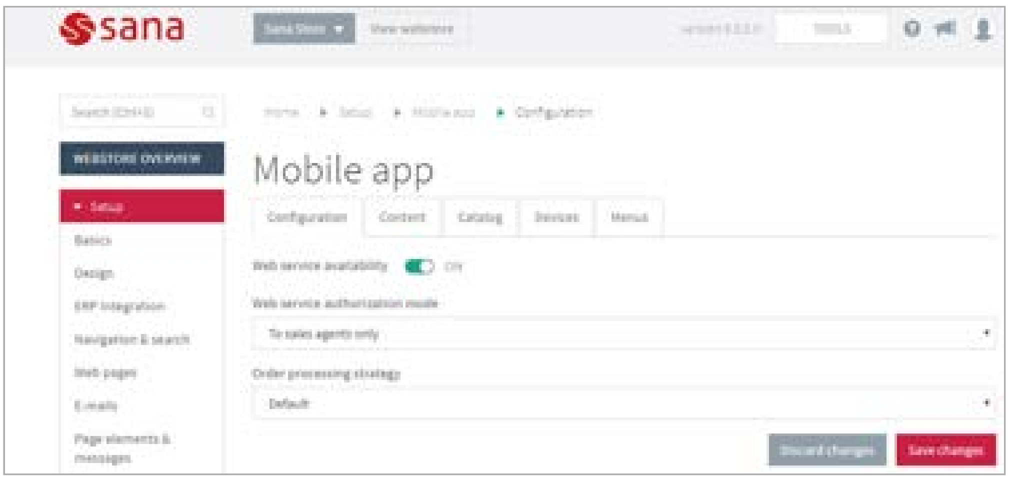
Mobile App

NOTE

We stopped developing and selling the Sana mobile application. It was replaced by the responsive design of the Sana web store. There will be no new versions of the Sana mobile app. Our current customers can continue using the mobile app.

In Sana Admin you can manage the content of the Sana Mobile app.

To configure the Sana Mobile app and manage its content in Sana Admin click: **Setup** > **Mobile app**.



The following content of the Sana Mobile app can be managed in Sana Admin:

- Welcome message
- Home page banner
- Disclaimer information
- Product descriptions
- Product images
- Menus
- Product lists
- Content of the "About" page of the Sana Mobile app

In Sana Admin you can also enable/disable the Web service and configure it in different modes to be used by the application. An overview of the registered mobile devices can be also seen.

For information about Sana Mobile app see "Sana Mobile App".

Mobile	

Configuration	Devices
Content	Menus
Catalog	

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Security Settings

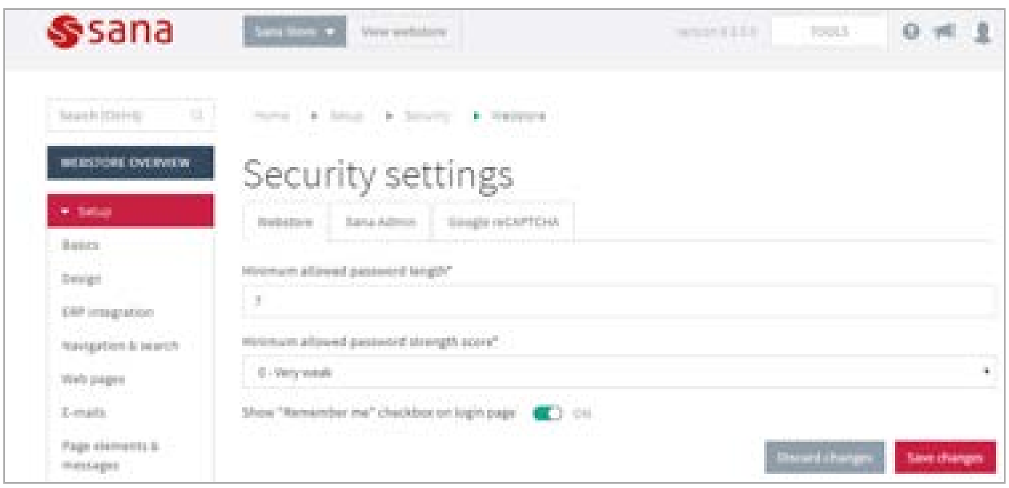
Sana Admin accounts and web store accounts of the customers are password-protected. Sana Commerce policy requires Sana Admin users and web store customers to use strong passwords. It is critically important to have a secure and unique password. Moreover, Sana is protected against the brute-force attacks.

Using **Security settings** in Sana Admin, you can set up password security policy and force your users to use only strong and secure passwords.

You can set up the security settings separately for the Sana Admin user accounts and for the Sana web store customer accounts.

The password security policy determines how strong (resistant to guessing) user passwords must be.

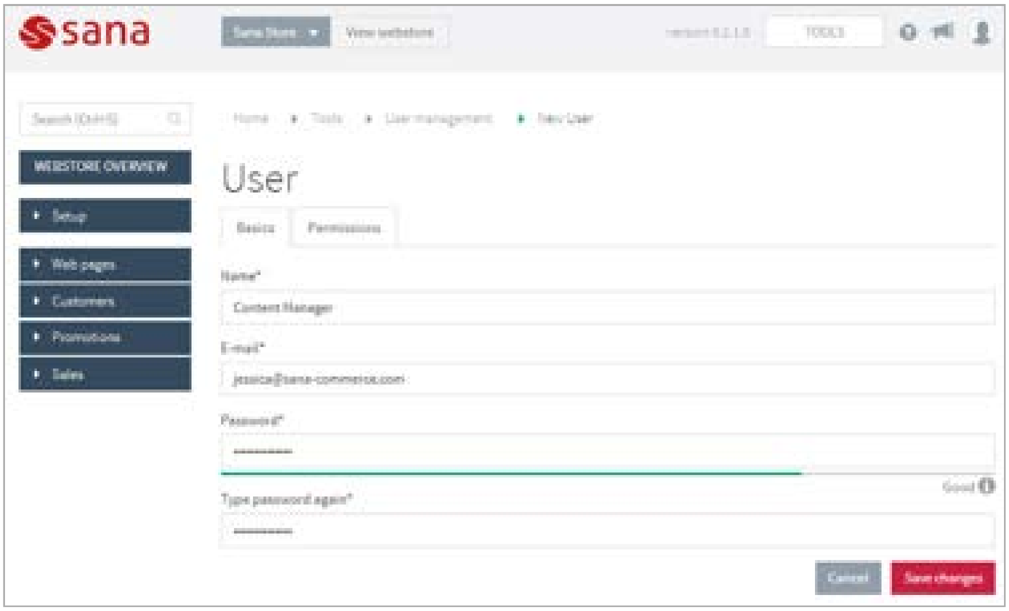
To set up password policy in Sana Admin, click: **Setup** > **Security**.

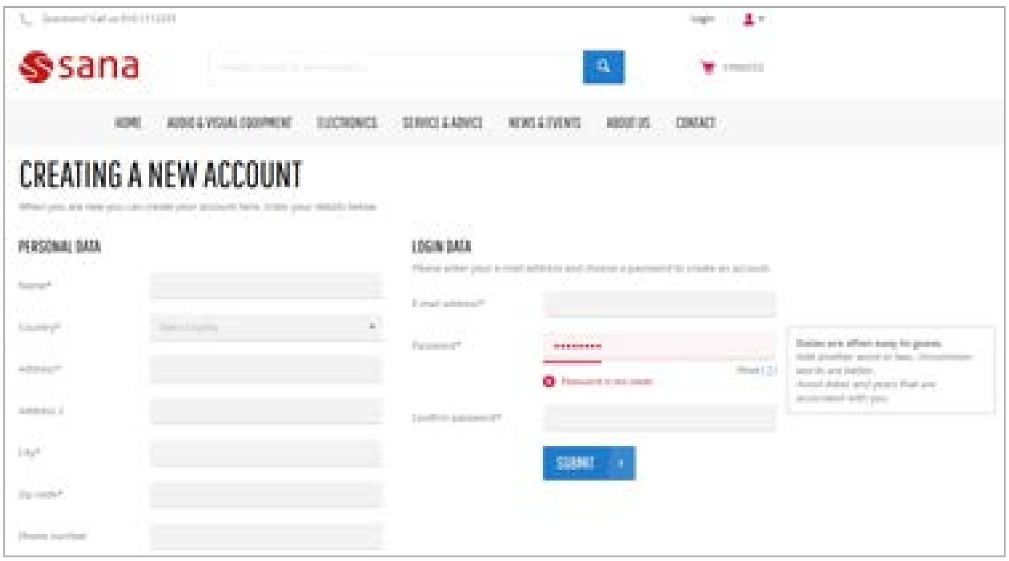


Enter the minimum allowed password length and select the password strength score. The default values are:

- Minimum allowed password length - 7
- Minimum allowed password strength score - Good

When a user creates an account, an instant feedback is shown about the password strength.





Password strength is a numerically expressed measure of the effectiveness of a password against guessing or brute-force attacks. The strength of a password is a function of length, complexity, and unpredictability.

Different algorithms are used to verify password strength. The higher password strength score, the higher requirements to the password, and thus the more secure it will be. Sana accounts use a scale of 0 to 4:

0 - Very weak - risky password, such as a simple or commonly used word, or a set of identical characters (repeats).

1 - Weak - protection from throttled online attacks.

2 - So-so - protection from unthrottled online attacks.

3 - Good - moderate protection from offline slow-hash scenario.

4 - Great - strong protection from offline slow-hash scenario.

Throttled online attack - This scenario presumes an attack that goes against some website or online service that has your password and that website has a mechanism of authentication delay which slows down the attack.

Unthrottled online attack - This scenario presumes an attack that goes against some website or online service that has your password and that website does not have any mechanism to delay or limit the attempts to authenticate.

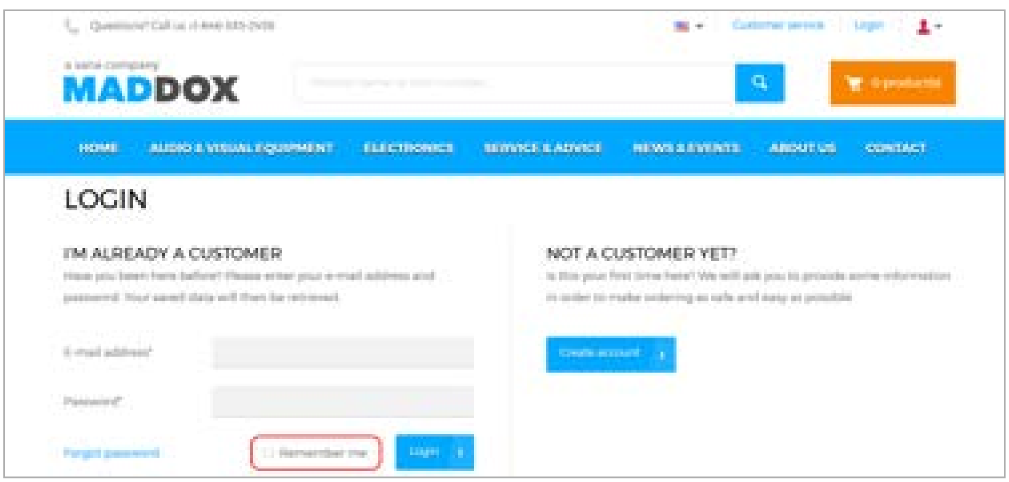
Offline attack against the "slow" hash - This scenario presumes that someone got an access to your password, which was not stored in plain text, but was "hashed", and an attacker tries to break your password offline. Slow-hash means that amount of guesses an attacker can try per second is lower (around 10,000 guesses per second) than if fast-hashing was used (around one billion to one trillion guesses per second).

Password strength depends on different factors and is estimated based on:

- commonly used passwords, like "password", "admin", etc.
- names and surnames, like "Mary", "Peter", "Smith", etc.
- popular words and common patterns, for example from movies
- dates, like "29062018"
- repeats, like "aaaaaaaa", "1111111", etc.
- sequences, like "abcdefgh", "0123456789", "6789012345", etc.
- keyboard patterns, like "qwertyuiop", "asdfghjkl", etc.
- inverted words, for example, "drwossap" can be inverted to "password"
- L33T (Leet) - replacing alphabet letters with numbers or symbols, like P@$$w0rd, @dmin, etc.

The examples above are very guessable, thus you should not use them.

You can also show and hide the **Remember me** checkbox on the Sana Admin login page and on the web store login page. If the **Remember me** checkbox is selected on the login page, then the next time a user tries to log in, he or she will not need to enter the credentials manually.



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Google reCAPTCHA

Watch the video

Sana uses Google reCAPTCHA to increase the security level of a webstore, prevent spam attacks and protect it from bots.

NOTE

Sana supports **Google reCAPTCHA v2**.

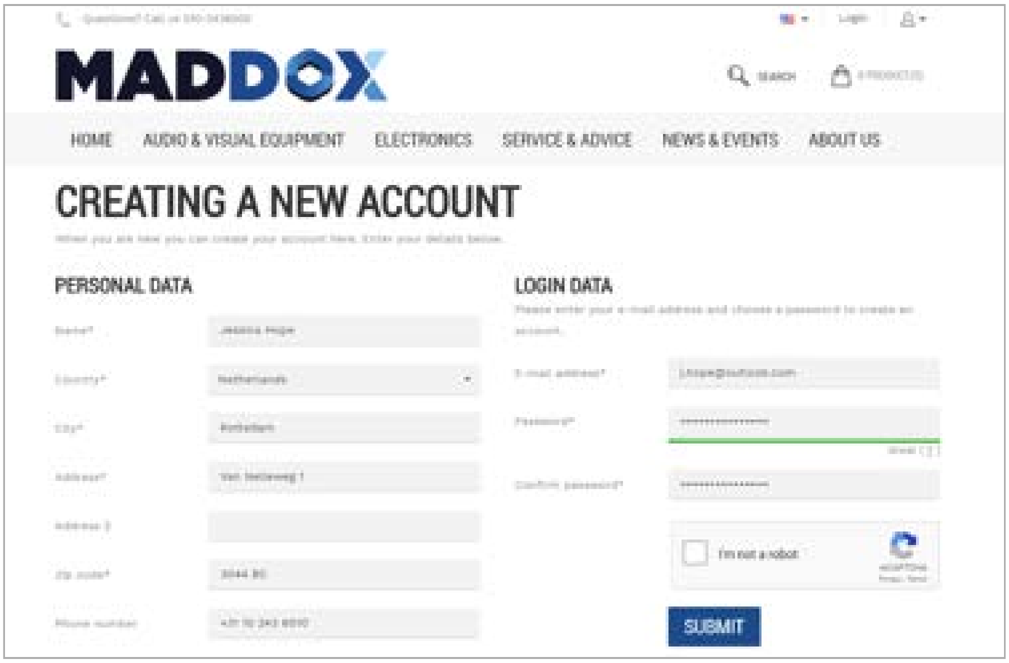
reCAPTCHA is a test to check whether the user is a human or not. You can add the Google reCAPTCHA widget to the following pages of a Sana webstore as an extra security check to deter bots from using these forms:

- Contact us
- Tell a friend
- Creating a new account (online customer registration)
- Forgot password
- Write a review

NOTE

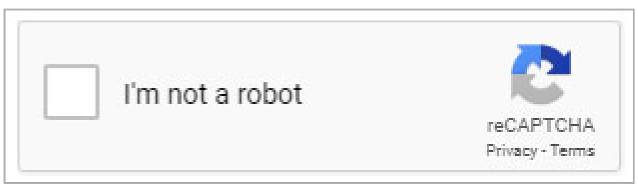
Starting from **Sana 9.3.1**, you can add the Google reCAPTCHA widget to the "Creating a new account" and "Write a review" pages of a Sana webstore.

Starting from **Sana 9.3.3**, you can add the Google reCAPTCHA widget to the "Forgot password" page of a Sana webstore.

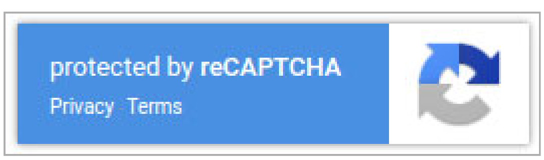


Sana supports two types of Google reCAPTCHA:

- **I'm not a robot (Checkbox)**: It requires the user to click on a checkbox indicating that the user is not a robot.



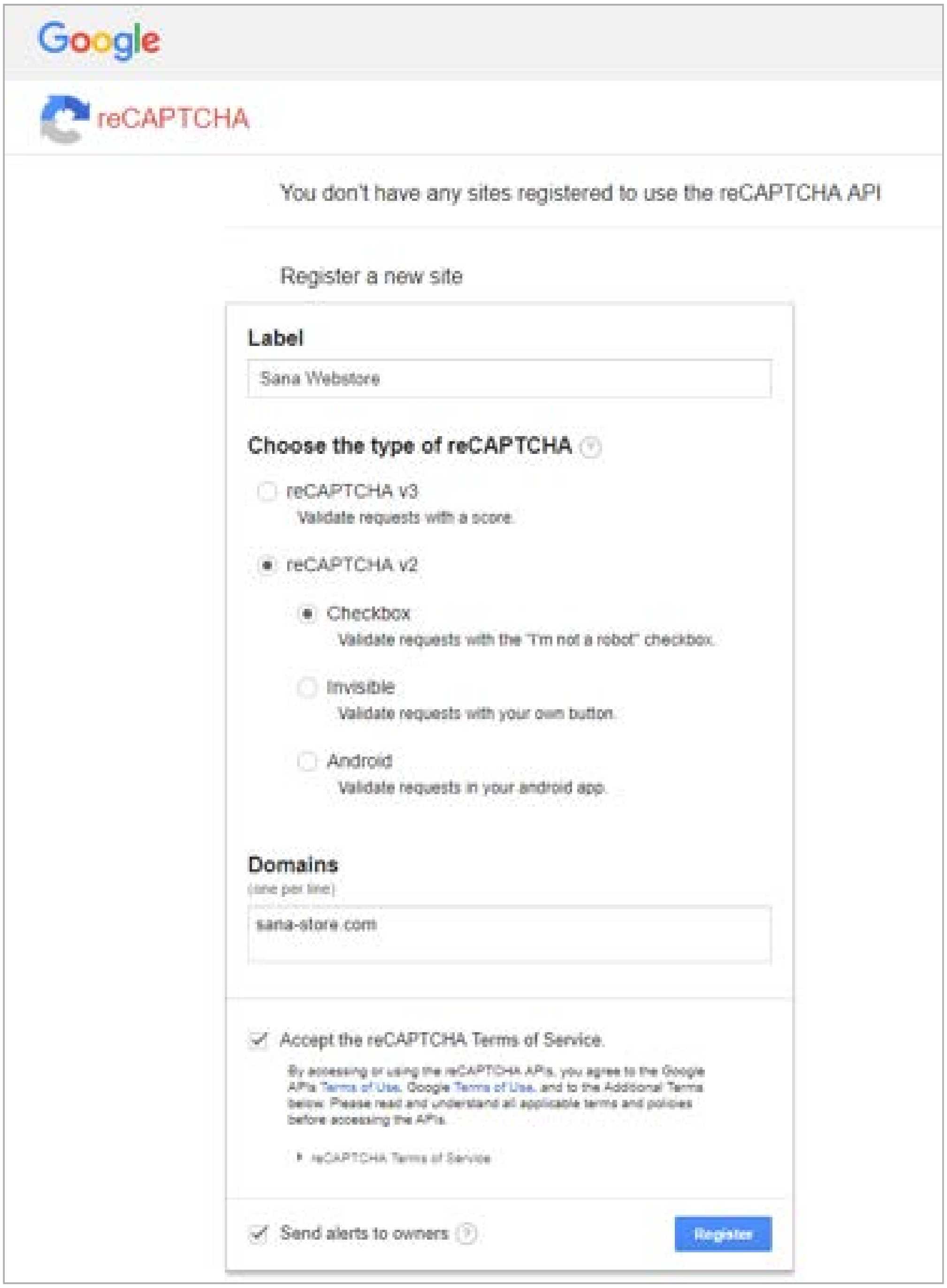
- **Invisible**: It does not require the user to click on a checkbox or any other actions at all, instead it is invoked directly when the user clicks on the "Submit" button on the page.



To start using Google reCAPTCHA, you need to sign up for an API key pair for your webstore. The key pair consists of a site key and secret key. The site key is used to invoke the reCAPTCHA service on the Sana webstore. The secret key authorizes communication between Sana and the reCAPTCHA server to verify the user's response. The secret key needs to be kept safe for security purposes.

How to register a Sana webstore and generate the site key and secret key

Step 1: Go to the Google reCAPTCHA admin panel and sign in with your Google account. If you don't have a Google account, create it.



Step 2: Enter some label. This can be anything you want, for example the name of your company, or webstore domain.

Step 3: Choose the type of **reCAPTCHA v2** you want to show in the Sana webstore, either "Checkbox" or "Invisible". Currently, Sana supports **Google reCAPTCHA v2**. Later you can generate the keys for another type of reCAPTCHA, if you want to change it.

Step 4: Enter your webstore domain.

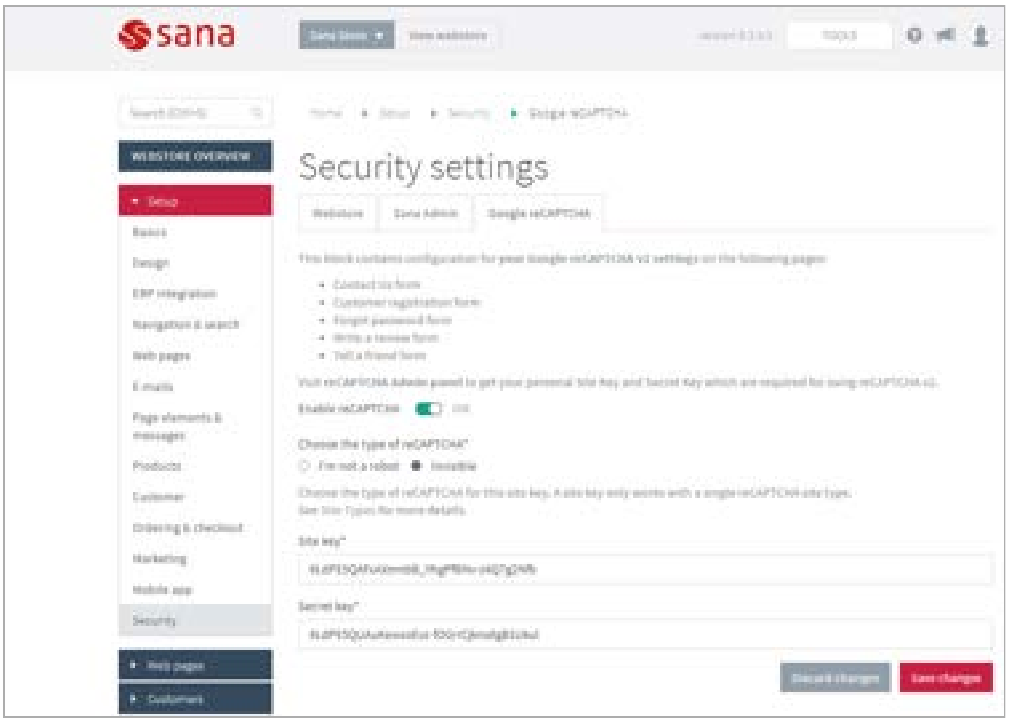
Step 5: Accept the reCAPTCHA Terms of Service and click **Register**.

Now you can see the key pair - **Site key** and **Secret key**.

To add Google reCAPTCHA to the pages of the Sana webstore, you will need to enter these keys in Sana Admin.

How to set up Google reCAPTCHA in Sana

Step 1: In Sana Admin click: **Setup** > **Security** > **Captcha settings**.



Step 2: Enable CAPTCHA and choose the type of reCAPTCHA for which you generated the keys in the Google reCAPTCHA admin panel.

Step 3: Enter the **Site key** and **Secret key**.

Open your web store and check the pages where you added the Google reCAPTCHA widget. You should see Google reCAPTCHA at the bottom of the forms.

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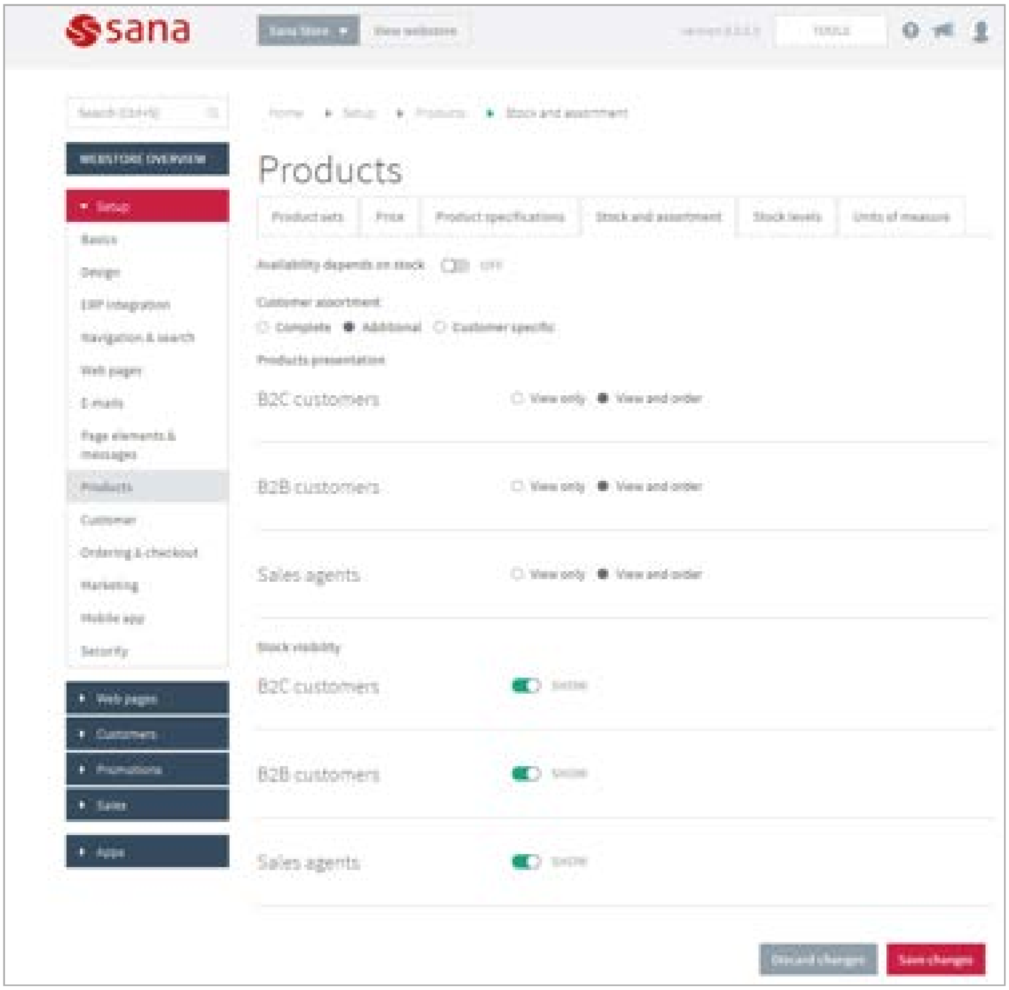
Product Availability



Few things can have an influence on product availability information in the webstore. This chapter summarizes the information about those things which may influence the product availability:

1. The **Availability depends on stock** in Sana Admin: **Setup** > **Products** > **Stock and assortment**. Two options are available:

- **OFF** - The availability of a product is not influenced by stock. You can order without limits.
- **ON** - The availability of a product in the webstore is checked whether it is in stock or out of stock.

  When a certain product is out of stock, the **not available** text will be shown in the webstore instead of the **Add to basket** button. If you try to order the number of products which exceeds the number available in stock, you will see a message in the basket: 'The quantities you requested are not available, and are reduced to the available quantities.' This means that the quantity will be changed to that which is available in stock.

2. **Visibility and orderability of products**: This should be accurately configured and checked in your ERP system. This means that the webstore catalog should be correctly created and configured in the ERP system.

Refer to the Microsoft Dynamics ERP manual on Sana online help, depending on your ERP system:

- Microsoft Dynamics NAV
- Microsoft Dynamics AX
- Microsoft Dynamics 365 Business Central
- Microsoft Dynamics 365 for Finance and Operations
- Microsoft Dynamics GP
- SAP Business One
- SAP

Use the **Webshop Catalog Overview** form in your ERP system to check products visibility and orderability. This form simulates the webstore behavior. If a product is not orderable you can see the reason of this. Everything is in one place and you can do the necessary changes directly from this form. For instance if a product is not visible you can open it from this form and make it visible.

For more information, see:

- Microsoft Dynamics NAV: Webshop Catalog Overview
- Microsoft Dynamics AX: Webshop Catalog Overview
- Microsoft Dynamics 365 Business Central: Webshop Catalog Overview
- Microsoft Dynamics 365 for Finance and Operations: Webshop Catalog Overview
- Microsoft Dynamics GP: Webshop Catalog Overview
- SAP Business One: Web Store Catalog Overview
- SAP: Webstore Catalog Overview

3. **Indexing of the product information**: The **Product import** task is used to retrieve the product information from the database to build or update the webstore index. Therefore, when you change product information, for instance change visibility of a product you should run the product index task to update the product information in the webstore.

For more information, see 'Product import'.

4. **Customer Assortment**: Webstore administrators can offer an optimized assortment of products to their customers by managing the webstore catalog that appeal to all customers as well as products targeted to the individual customers.

For more information, see 'Customer Assortment'.

5. **Webshop filter**: Webstore administrators can use the webshop filter in the ERP system when only a subset of the webstore catalog should be visible.

For more information, see:

- Microsoft Dynamics NAV: Webshop Filters
- Microsoft Dynamics AX: Webshop Filters
- Microsoft Dynamics 365 Business Central: Webshop Filters
- Microsoft Dynamics 365 for Finance and Operations: Webshop Filters
- Microsoft Dynamics GP: Catalog Filter
- SAP Business One: Web Store Filters
- SAP: Webstore Filter

6. **Data Validation Rules**: The **Data Validation Rules** form can be used to manage data validation in your ERP system for the appropriate tables and fields. Configuration of the validation rules affect data retrieving. Thus, you can configure validation rules which will define if an item is orderable. Only data which satisfies the selected criteria can be processed.

For more information, see:

- Microsoft Dynamics NAV: Data Validation Rules
- Microsoft Dynamics AX: Data Validation Rules
- Microsoft Dynamics 365 Business Central: Data Validation Rules
- Microsoft Dynamics 365 for Finance and Operations: Data Validation Rules
- Microsoft Dynamics GP: Data Validation Rules
- SAP Business One: Data Validation Rules
- SAP: Data Validation Rules

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Customer Assortment

Watch the video

Webstore administrators can offer an optimized assortment of products to the customers. Offering the best mix of products is essential to customers' satisfaction. This way a webstore administrator can optimize the webstore catalog with products that appeal to all customers as well as products targeted to the individual customers.

To use customer assortment in Sana Admin click: **Setup** > **Products** > **Stock and assortment**.

Three assortment modes are available:

Assortment mode	Description
Complete	All products are available to all customers. If a customer specific product set is added to a page, products from this product set will be shown only to the customers for whom customer assortment rules are configured in the ERP system.
Additional	Products which are configured in the **Customer Assortment** table in the ERP system as available to the individual customers are shown to them. On top of this all products which are not mentioned in the **Customer Assortment** table in your ERP system will be shown to the customers.
Customer specific	Only those products which are configured as available to the individual customers are shown to them. Use the **Customer Assortment** table in your ERP system to specify which products should be shown to each customer or customer price group.

See also:

Microsoft Dynamics NAV: Customer Assortment

Microsoft Dynamics AX: Customer Assortment

Microsoft Dynamics 365 Business Central: Customer Assortment

Microsoft Dynamics 365 for Finance and Operations: Customer Assortment

Microsoft Dynamics GP: Customer Assortment

SAP Business One: Customer Assortment

SAP ERP: Customer Assortment

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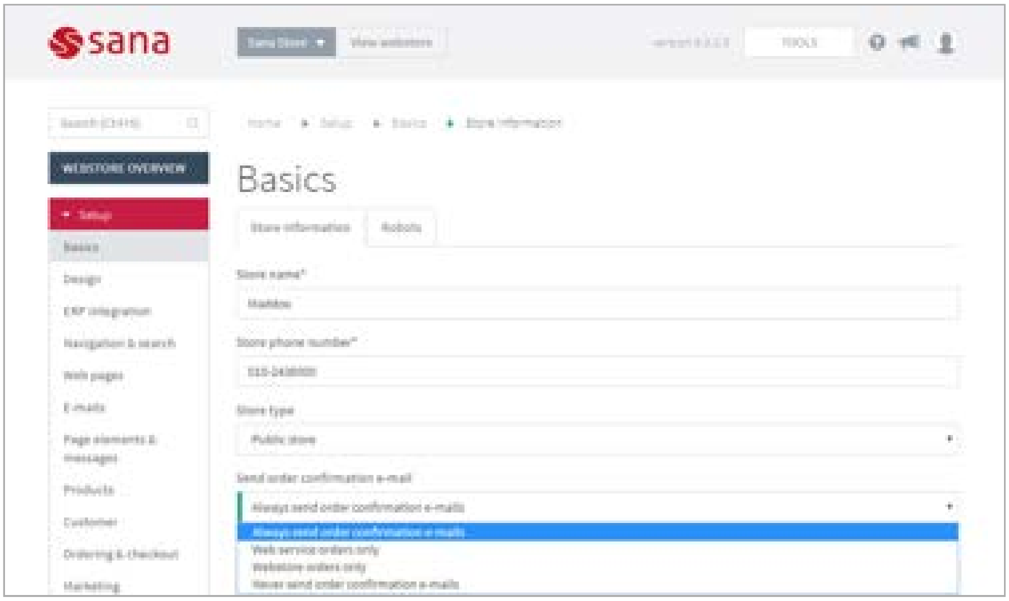
Order Confirmation

Sana uses customer's shop account e-mail address to send order confirmation.

To configure order confirmation, in Sana Admin click: **Setup** > **Basics** > **Send order confirmation e-mail**.



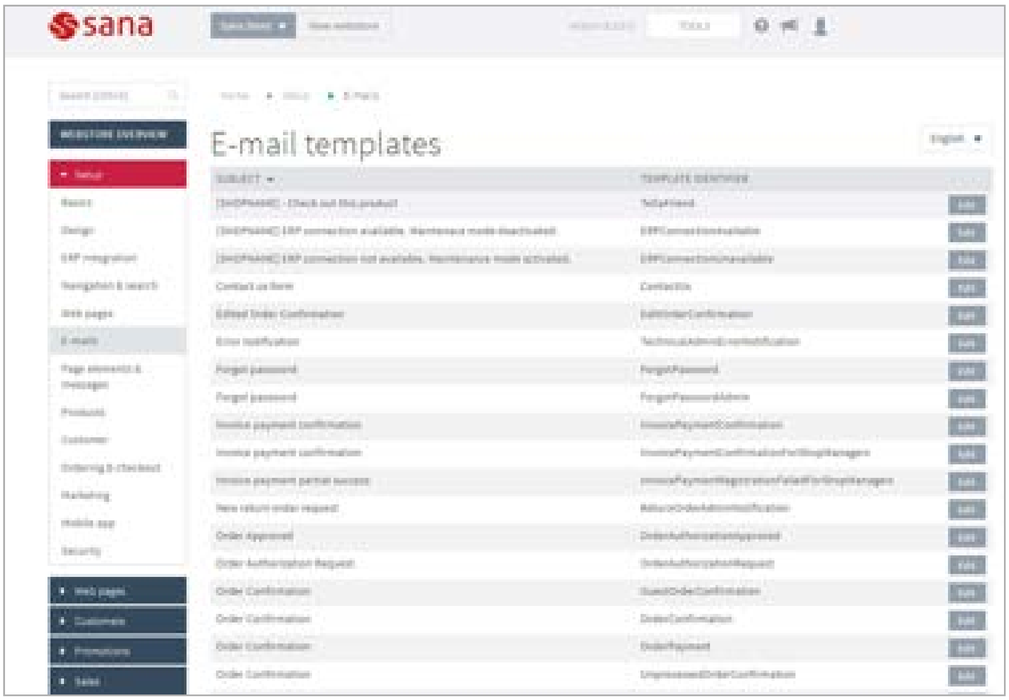
The table below provides description of the available options.

Option	Description
Always send order confirmation e-mails	Select this option if you want to send the order confirmation e-mails to the customers. It is used for both, when the order is placed in the web store and Sana mobile app, if such is used.
Web service orders only	Select this option if you want to send the order confirmation e-mails when the orders are placed using the Sana mobile app only. If this option is set, the order confirmation e-mails will be sent to the customers.
Webstore orders only	Select this option if you want to send the order confirmation e-mails when the orders are placed in the Sana web store only. If this option is set, the order confirmation e-mails will be sent to the customers.
Never send order confirmation e-mails	Select this option if you do not want to send the order confirmation e-mails to the customers. It is used to disable the order confirmation e-mails for both, web store and Sana mobile app, if such is used.
Send order confirmation e-mail to customers when the order is placed by sales agent	If this option is enabled, when a sales agent represents a customer, the order confirmation e-mail will be sent to the sales agent (sales agent shop account e-mail) as well as to the represented customer (customer's e-mail in the ERP system). If it is disabled, the order confirmation e-mail will be sent only to the sales agent.

The order confirmation e-mails are sent to different e-mail addresses in different scenarios. To summarize and to have a clear understanding of which e-mail addresses are used for order confirmation e-mails, see all possible scenarios below.

1. When a customer places an order, the order confirmation e-mail is sent to the e-mail address of the customer's shop account in Sana Admin.
2. When a sales agent places an order on behalf of a business customer, and it is enabled to send order confirmation e-mails to both, it is sent to the e-mail address of the sales agent's shop account in Sana Admin and to the customer's e-mail address in the ERP system.
3. If a customer in the ERP system has the associated bill-to (invoice) customer account, the order confirmation e-mail is sent to the e-mail address of a customer in ERP and to the e-mail address of the associated bill-to (invoice) customer in ERP.
4. All order confirmation e-mails are also sent to the e-mail address set in the **"BCC" e-mail addresses** field in Sana Admin.

For order confirmation e-mails Sana uses the "Order Confirmation" e-mail template, which can be seen in Sana Admin: **Setup** > **E-mails**.



When the customer edits the existing order in a Sana web store and then places it, another order confirmation e-mail will be sent to the customer with the latest order details. The e-mail template "Edited Order Confirmation" is used for such order confirmation e-mails.

For more information about e-mail templates, see "E-mails".

The order confirmation e-mail is sent to the customer when the order has been placed and paid successfully.

NOTE

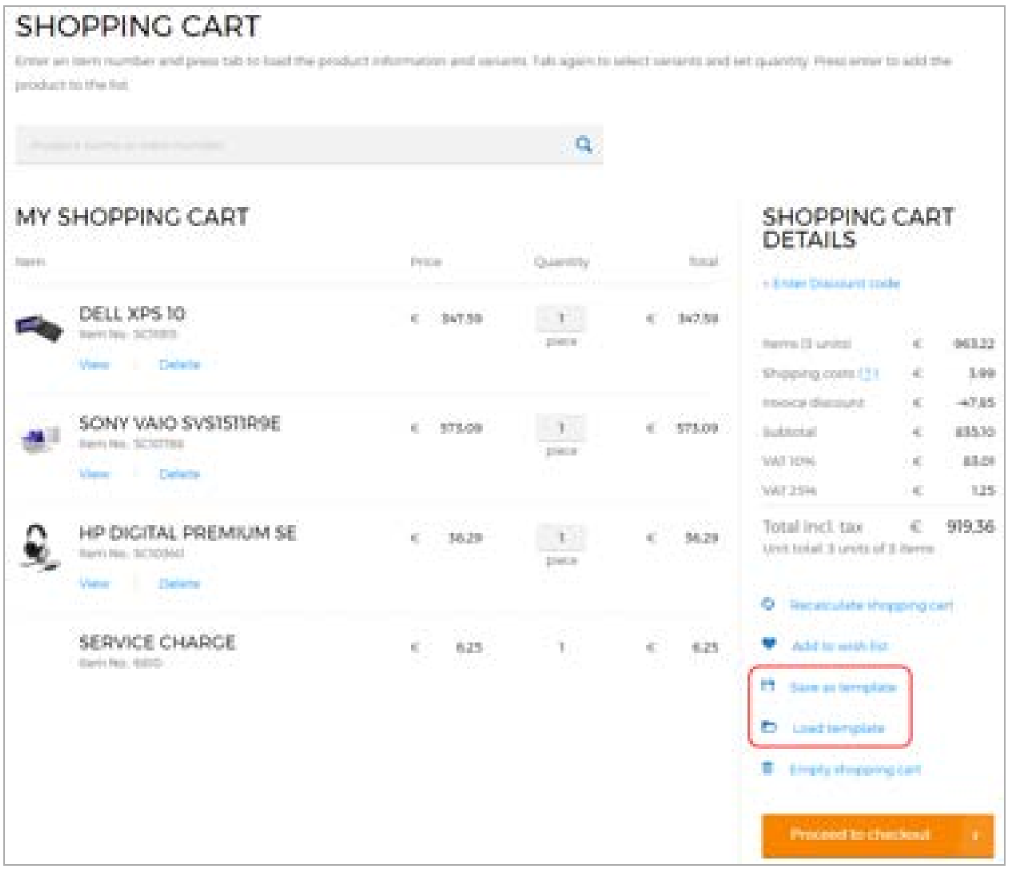
If a customer pays via **Bank transfer** payment method, the order confirmation is sent to a customer when the order status is set to **In progress**.

This is because the payment process of the Bank transfer payment method differs. In the Bank transfer payment method, purchasers take the initiative. They send to their bank an order to transfer an amount from their account to the account of the seller. Docdata receives customer's payment and transfers it through to the merchant.

Order Templates

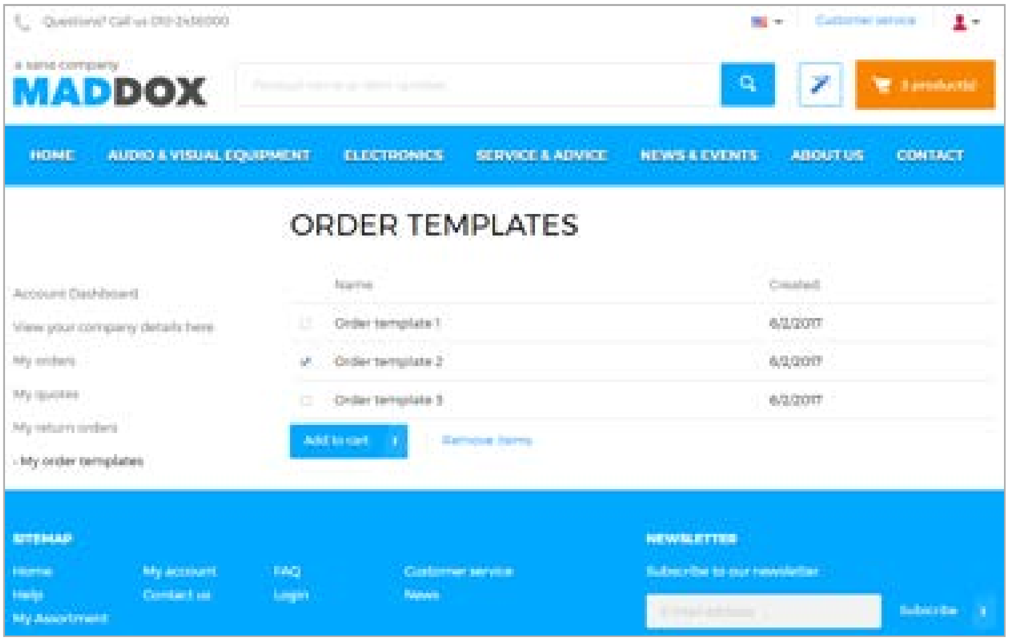
Business customers can save shopping carts for later retrieval. This allows business customers to continue with other orders without losing the details of the current order, if it can't be completed at the moment.

Business customers can save all products that are currently available in the shopping cart as the order template. Once the customer is ready to continue with the order, he or she can load the order template to retrieve the shopping cart.



If there are some products in the shopping cart and the customer loads the template, all products from the template will be added to those which are already in the shopping cart.

A customer can add products to the shopping cart from multiple templates. All order templates saved by a customer can be accessed from the "My account" page.



When a customer adds the products to the shopping cart from the order template, the products availability will be validated. If some product is not available anymore, a customer will see a message in the shopping cart.

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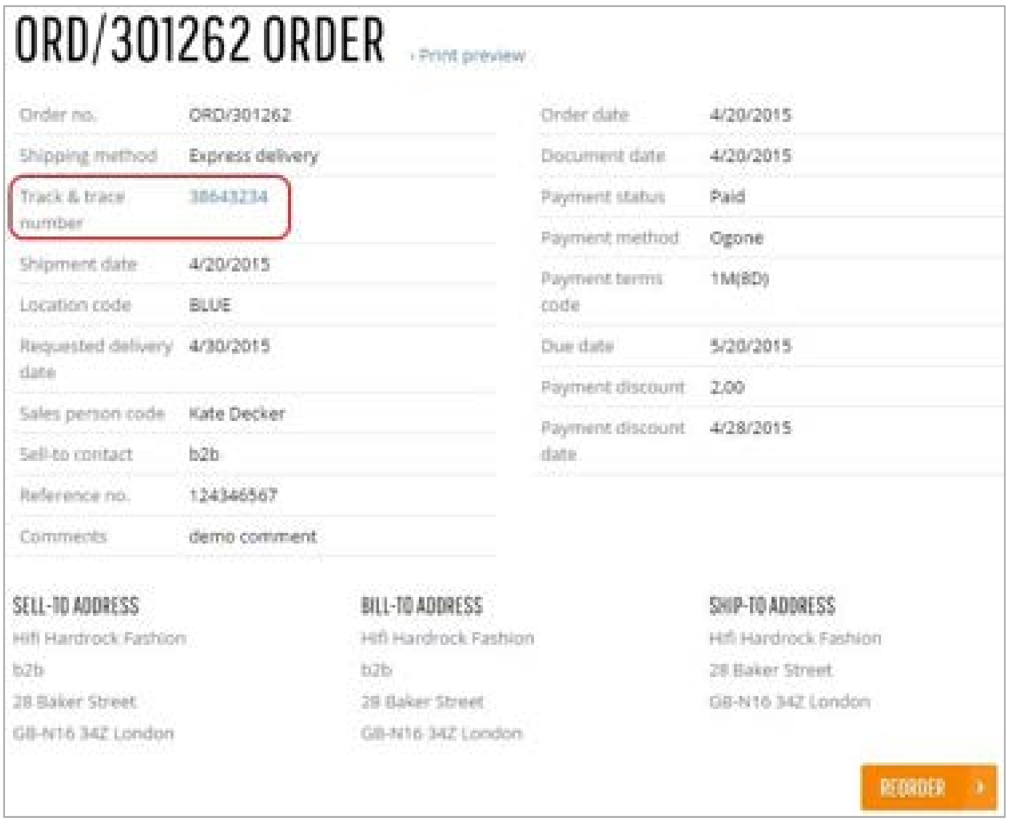
Track Order

You can add more value to the shipping methods functionality. Give your customers the benefit of tracking their orders at real time directly from the Sana Commerce webstore.

The customers just need to click on the tracking number from the order details/posted shipment in the webstore to check delivery status of their package directly on the shipping service provider website.



Track & Trace Number

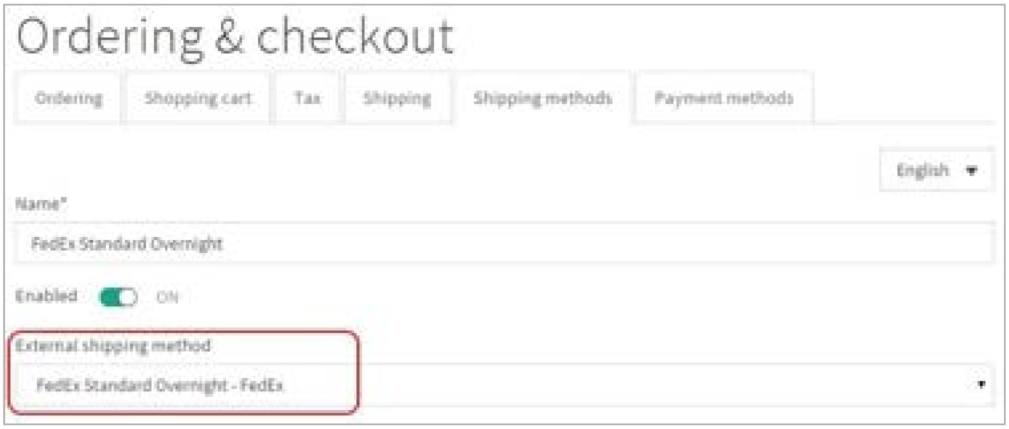
To allow customers tracking their orders:

Step 1: Configure shipping providers and methods in the ERP system. Enter the URL of the tracking web site for each shipping provider you are configuring.

For more information, read one of the following articles depending on the ERP system you are connected to:

- **Microsoft Dynamics NAV**: Shipping Agents and Services
- **Microsoft Dynamics AX**: Shipping Providers and Methods
- **Microsoft Dynamics 365 Business Central**: Shipping Agents and Services
- **SAP**: Order Tracking
- **SAP Business One**: Shipping Methods

Step 2: Map shipping methods in Sana Admin to the shipping methods in the ERP system. This can be done in the 'External shipping method' field.



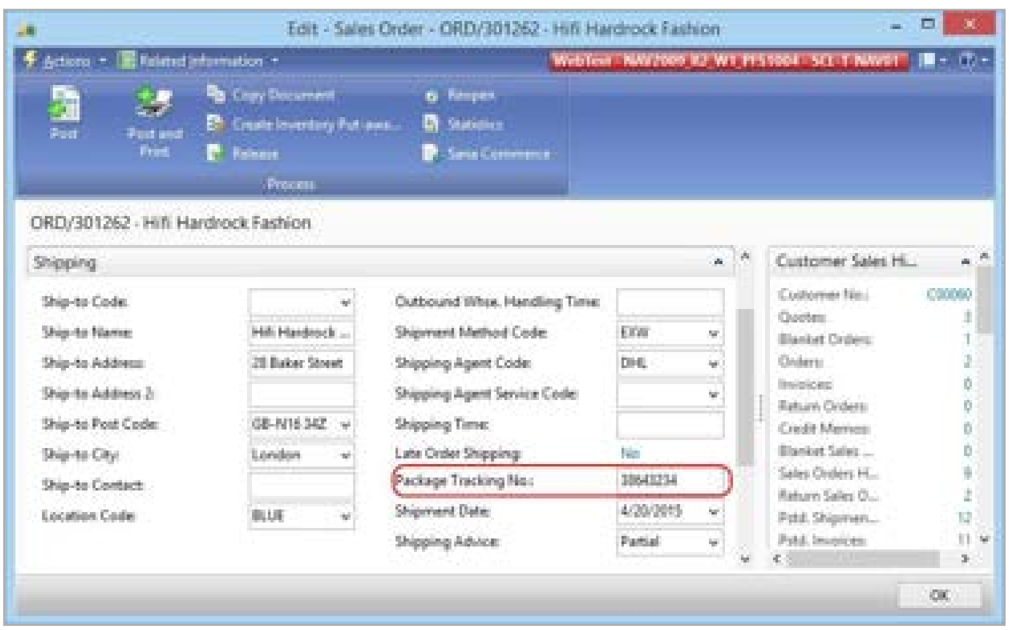
External Shipping Method

For more information about how to configure shipping methods in Sana Admin, see "Shipping methods".

Step 3: To show a tracking number to a customer on the order details/posted shipment page in the webstore it should be available in the ERP system.

Microsoft Dynamics NAV

In Microsoft Dynamics NAV the tracking number can be entered on the sales order or posted sales shipment, on the **Shipping** FastTab, in the **Package Tracking No**. field. If you fill in the **Package Tracking No**. field on the sales header, the program will copy it to the posted sales shipment automatically.

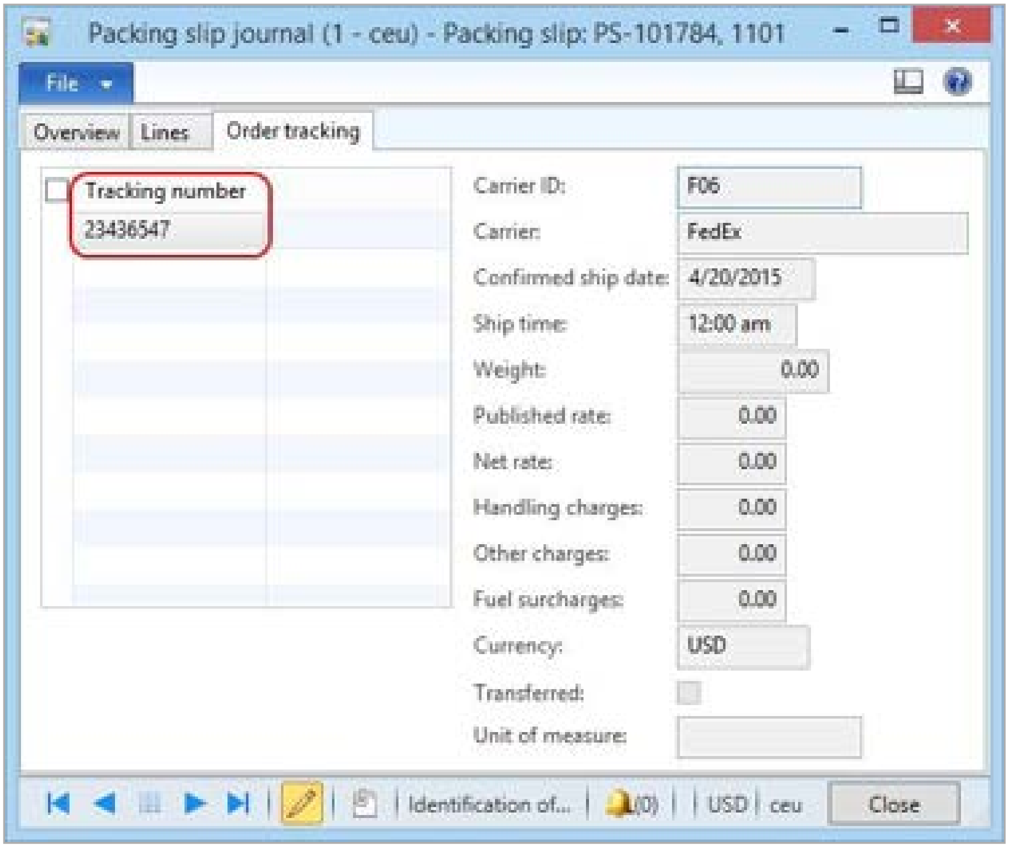


Package Tracking No.

If tracking number is available on the sales order/posted sales shipment in Microsoft Dynamics NAV, it will be shown in the webstore on the order details/posted shipment page.

Microsoft Dynamics AX

In Microsoft Dynamics AX the tracking numbers are coming from the integrated shipping service provider. If tracking number is present in the order tracking information of the related sales order in Microsoft Dynamics AX, it will be shown in the webstore only for the posted shipments. It is possible to see the tracking number in the webstore only when order delivery has been posted in Microsoft Dynamics AX and order tracking information is available in the packing slip journal of the related sales order.



Tracking Number

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Product Images

Watch the video

This chapter is a walkthrough on how to prepare product images and add them to the products in your catalog. The entire process of preparing product images consists of the following steps:

1. Create product images of the size not less than 1024 x 1024px.
2. Give the correct names to the product images.
3. Upload the product images to the correct directory on the Web server.
4. Link the images to the products, by running the **Product image import** task.
5. Check that the product images are shown in the web store.

NOTE

Sana can also use product images directly from the ERP system, if ERP supports this. Currently, Sana does not support product images from Microsoft Dynamics GP. Thus, you can add product images to the file system of Sana.

For more information about product images in ERP, see:

- Item Images in Microsoft Dynamics NAV
- Product Images in Microsoft Dynamics AX
- Item Images in Microsoft Dynamics 365 Business Central
- Product Images in Microsoft Dynamics 365 for Finance and Operations
- Item Images in SAP Business One
- Product Images in SAP ECC

Prepare product images and link them to the products

Step 1: You must create one image for each product and product variant. All images must be of a size not less than: width - 1024 px and height - 1024 px.

Step 2: Give the correct names to the images. The image file name format must be exactly as described below:

[Item No] [Separator] [Variant Code] [Separator] [Order number].[Extension]

Image file name parts	Description
Item No.	This is a required value and must match the item number used in your ERP system.
Separator	This is a character which is used to separate the product image name values in the image file name. You must use the same separator in the product image file name as the one specified in the **Product image import** task

	settings. Default value: "_"
Variant Code	This is an optional value and must be specified for images of the product variants, if such are present. If this is an image for a product variant, you must also specify the item variant code in the image file name used in your ERP system. In Microsoft Dynamics NAV item variant code can be seen in the **Item Variants** table. If you use Microsoft Dynamics NAV with the Fashion add-on, the item variant code must match the vertical item variant code in NAV. In Microsoft Dynamics AX product variant ID cannot be seen directly in the AX table but only in the system table in the Application Object Tree. For more information on where the product variants IDs are stored in AX, see "Product Variants IDs".
Order number	This is a required value which is used to add multiple images to the product. When you need to add only one image you must still use "1" as an order number in the product image file name. If more images should be added to the product, the second image must have the order number "2", and so on.
Extension	This is the extension of a product image file. Supported extensions are: JPG, JPEG, PNG, BMP and GIF.

The examples of the product image file names:

- 1001_1.jpg (with a separator "_")
- 1001_M_1.jpg (with a product variant code "M")

Step 3: When the images (not less than 1024 x 1024) for each product and product variant are ready with the correct file names, they must be uploaded to the Web server. All product images must be added to the following location of the Sana Commerce frontend directory:

/content/files/images/ProductImages

Step 4: Now you must run the **Product image import** task to resize the images and link them to the products. In Sana Admin click: **Tools** > **Scheduled tasks**, and run the **Product image import** task.

For more information, see "Product Image Import".

When the **Product image import** task is finished you should see the product images in your web store. Open the web store and check that the product images are shown. The product images must be also shown on the product pages in Sana Admin.

If you need to replace the existing product image, you must put the new image with the correct product image file name to the "ProductImages" folder, and run the "Product image import" task. The image will be resized and will replace the appropriate image with the same name in the "Small", "Medium" and "Large" folders.

Product images can be also added directly on the product pages in Sana Admin. To manage product pages, in Sana Admin click: **Web pages** > **Product pages**. You can change the order of product images simply by dragging and dropping them. On the product details page, in the image carousel, the product images are shown in the order they are placed in Sana Admin. For more information, see "Product Pages".

Below you can read more detailed information about the product image import process and conversions which happen with the product images when the **Product image import** task is running.

How does the resizing of product images work?

When you run the **Product image import** task, three folders will be automatically created in the Sana Commerce frontend directory on the Web server (/content/files/images/ProductImages/): "Small", "Medium" and "Large". The **Product image import** task automatically resizes all your product images from the "ProductImages" folder and puts them according to the size to the "Small", "Medium" and "Large" folders. This is done because product images of three different sizes are used in the Sana web store:

- **Small images** are shown in the image carousel on the product details pages and on all other pages where the product thumbnails are present (product list pages, search results page, shopping cart).
- **Medium images** are shown on the product details pages.
- **Large images** are shown when you zoom the product image on the product details page.

The product images are automatically resized to the sizes which do not exceed:

	Width	**Height**
Small	84 px	84 px
Medium	400 px	400 px
Large	1024 px	1024 px

Therefore, when you prepare the product images, you must create only one image of a large size (can be any size not less than 1024 x 1024px) for every single product and product variant. The images should be square-shaped, since they fit the web store design well. When the images are ready, put them to the "ProductImages" folder.

When you run the **Product image import** task the product images are retrieved from the "ProductImages" folder, resized and distributed according to their sizes among three folders. When the images are resized and placed to the appropriate folders according to their size, the images in the "ProductImages" folder will be automatically deleted, if the **Product image import** task has been successfully finished.

In case the image size is larger than 1024 x 1024px, Sana downscales the image size to 1024 x 1024px and puts the resized image to the "Large" folder. Then Sana creates medium and small images and puts them to the relevant folders.

If you create an image of the size less than 1024 x 1024px, the large image will not be available. Sana will downscale the size of an image to 400 x 400px and put it to the "Medium" folder. Then, Sana will create a small image and put it to the "Small" folder.

The same logic is used, if you create an image smaller than 400 x 400px. The large and medium images will not be created. Sana will downscale the size of an image to 84 x 84px and put it to the "Small" folder.

If you create the image which is not square-shaped, and its longer side is more than 1024px, then Sana will downscale the image by the longest side, keeping its proportions.

If you redesign your web store, the default image sizes can be redefined, or if needed, you can add other image sizes. This can be done in the "Web.config" file of the Sana Commerce frontend. In the "Web.config" file locate the <image-sizes> section, and add a line in the following format, where you should specify the image size name ("small", "medium", or "large", or any new image size name, if you customize the web store design), width and height of the images:

```
<size name="name" width="" height="">
```

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Product Images

Watch the video

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1. Create product images of the size not less than 1024 x 1024px.
2. Give the correct names to the product images.
3. Upload the product images to the correct directory on the Web server.
4. Link the images to the products, by running the **Product image import** task.
5. Check that the product images are shown in the web store.

NOTE

Sana can also use product images directly from the ERP system, if ERP supports this. Currently, Sana does not support product images from Microsoft Dynamics GP. Thus, you can add product images to the file system of Sana.

For more information about product images in ERP, see:

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Step 1: You must create one image for each product and product variant. All images must be of a size not less than: width - 1024 px and height - 1024 px.

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[Item No] [Separator] [Variant Code] [Separator] [Order number].[Extension]

Image file name parts	Description
Item No.	This is a required value and must match the item number used in your ERP system.
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	settings. Default value: "_"
Variant Code	This is an optional value and must be specified for images of the product variants, if such are present. If this is an image for a product variant, you must also specify the item variant code in the image file name used in your ERP system. In Microsoft Dynamics NAV item variant code can be seen in the **Item Variants** table. If you use Microsoft Dynamics NAV with the Fashion add-on, the item variant code must match the vertical item variant code in NAV. In Microsoft Dynamics AX product variant ID cannot be seen directly in the AX table but only in the system table in the Application Object Tree. For more information on where the product variants IDs are stored in AX, see "Product Variants IDs".
Order number	This is a required value which is used to add multiple images to the product. When you need to add only one image you must still use "1" as an order number in the product image file name. If more images should be added to the product, the second image must have the order number "2", and so on.
Extension	This is the extension of a product image file. Supported extensions are: JPG, JPEG, PNG, BMP and GIF.

The examples of the product image file names:

- 1001_1.jpg (with a separator "_")
- 1001_M_1.jpg (with a product variant code "M")

Step 3: When the images (not less than 1024 x 1024) for each product and product variant are ready with the correct file names, they must be uploaded to the Web server. All product images must be added to the following location of the Sana Commerce frontend directory:

/content/files/images/ProductImages

Step 4: Now you must run the **Product image import** task to resize the images and link them to the products. In Sana Admin click: **Tools** > **Scheduled tasks**, and run the **Product image import** task.

For more information, see "Product Image Import".

When the **Product image import** task is finished you should see the product images in your web store. Open the web store and check that the product images are shown. The product images must be also shown on the product pages in Sana Admin.

If you need to replace the existing product image, you must put the new image with the correct product image file name to the "ProductImages" folder, and run the "Product image import" task. The image will be resized and will replace the appropriate image with the same name in the "Small", "Medium" and "Large" folders.

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The product images are automatically resized to the sizes which do not exceed:

	Width	Height
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Large	1024 px	1024 px

Therefore, when you prepare the product images, you must create only one image of a large size (can be any size not less than 1024 x 1024px) for every single product and product variant. The images should be square-shaped, since they fit the web store design well. When the images are ready, put them to the "ProductImages" folder.

When you run the **Product image import** task the product images are retrieved from the "ProductImages" folder, resized and distributed according to their sizes among three folders. When the images are resized and placed to the appropriate folders according to their size, the images in the "ProductImages" folder will be automatically deleted, if the **Product image import** task has been successfully finished.

In case the image size is larger than 1024 x 1024px, Sana downscales the image size to 1024 x 1024px and puts the resized image to the "Large" folder. Then Sana creates medium and small images and puts them to the relevant folders.

If you create an image of the size less than 1024 x 1024px, the large image will not be available. Sana will downscale the size of an image to 400 x 400px and put it to the "Medium" folder. Then, Sana will create a small image and put it to the "Small" folder.

The same logic is used, if you create an image smaller than 400 x 400px. The large and medium images will not be created. Sana will downscale the size of an image to 84 x 84px and put it to the "Small" folder.

If you create the image which is not square-shaped, and its longer side is more than 1024px, then Sana will downscale the image by the longest side, keeping its proportions.

If you redesign your web store, the default image sizes can be redefined, or if needed, you can add other image sizes. This can be done in the "Web.config" file of the Sana Commerce frontend. In the "Web.config" file locate the <image-sizes> section, and add a line in the following format, where you should specify the image size name ("small", "medium", or "large", or any new image size name, if you customize the web store design), width and height of the images:

```
<size name="name" width="" height="">
```

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Sales Reports

Watch the video

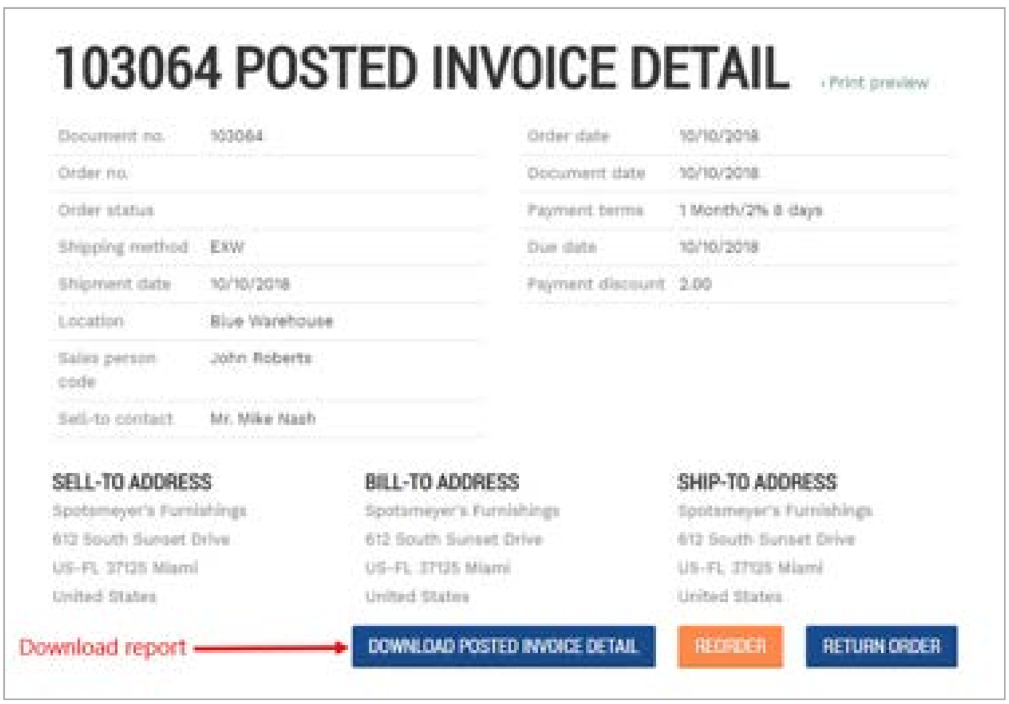
NOTE

Currently, Sana does not support sales reports from SAP Business One and Microsoft Dynamics GP. Thus, you can add sales reports to the file system of Sana.

Sales reports can be key in keeping the sales process and the cash flow movement.

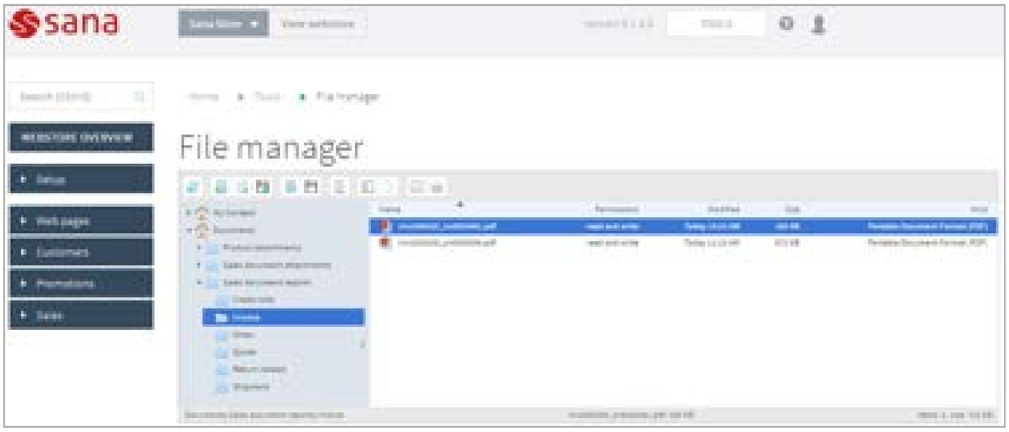
Sana enables customers to download printable reports (PDF file) generated by the ERP system directly from the web store.

A customer can download sales reports from the web store in the selected language, if the ERP system can generate reports in different languages.



Many ERP systems can generate reports for all types of sales documents (orders, quotes, invoices, shipments, return receipts, credit notes).

It is also possible to upload sales reports to the file system directly on the Web server or using **File manager** in Sana Admin.



This might be useful, for example if your ERP system does not support generation of printable sales reports and you use some external service to generate reports. In this case the generated sales reports can be uploaded to the Web server and will be available for download in the Sana web store.

Add reports to the sales documents using file manager

Step 1: In Sana Admin click: **Tools** > **File manager**.

Step 2: Expand the "Sales document reports" folder and see the folders each corresponding to a specific sales document:

- Credit note
- Invoice
- Order
- Quote
- Return receipt
- Shipment

Step 3: Upload the necessary sales reports to the appropriate sales document folders. The name of the sales report file should be the same as the sales document ID.

If this is a report of the original sales document, for example sales order, then the name of the sales report file should be the same as the order ID.

Example: ORD12345

If this is a report of the related sales document, for example an invoice created from a sales order, then the name of the sales report file should be in the following format: [ID of the related sales document]_[ID of the original sales document].

Example: INV32786_ORD586049

If a sales document does not have the original sales order ID for some reason, then the name of the sales report should contain only the existing sales document ID.

Example: INV32787

NOTE

If sales document ID has some special characters which are not allowed (\/:*?"<>|), these characters should be replaced in the name of the sales report file according to the character replacement rules configured in Sana Admin.

Only one sales report can be uploaded for each sales document.

See also:

Sales reports in Microsoft Dynamics NAV

Sales reports in Microsoft Dynamics AX

Sales Reports in Microsoft Dynamics 365 Business Central

Sales Reports in Microsoft Dynamics 365 for Finance and Operations

Sales reports in SAP ECC

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Google Tag Manager

Here are some possibilities and advantages which Google Tag Manager (GTM) provides to improve your online business management:

- You can add and update Google AdWords tags, Analytics tags, DoubleClick Floodlight tags and many non-Google third-party tags directly from Google Tag Manager, instead of editing the website code.
- Google Tag Manager allows you to install a basic implementation of Google Analytics via Google Tag Manager.
- GTM is equipped with Auto-Event Tracking functionality. You can create event tags directly within the Google Tag Manager interface and fire them with triggers. It will help to track and understand customers' actions.
- Its built-in debug features allow to test and debug each update on your site prior to publication, ensuring that your tags work properly before they are live.

To start your work with Google Tag Manager you will need to do the following:

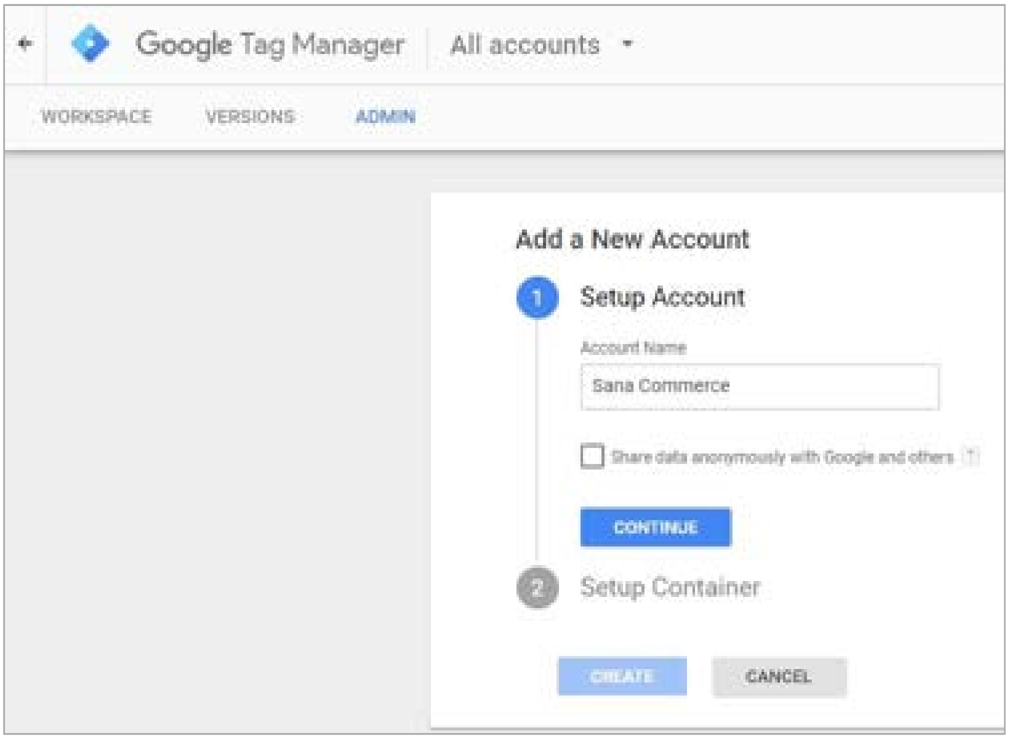
- Create Google Tag Manager Account (this account will be used for Google Analytics as well).
- Set up container and enter the container ID into Sana Admin.
- Configure Google Tag Manager for your webstore.

For more information about Google Tag Manager usage and its basic configuration, see "Google Tag Manager Help".

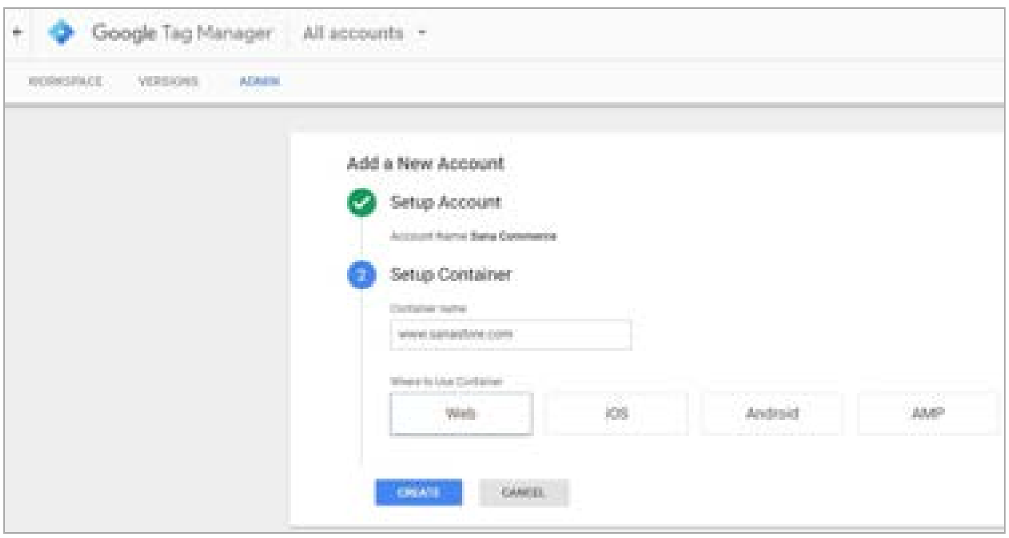
Google Tag Manager provides a lot of great tools. In this article we give you one of the common scenarios of how to set up Google Tag Manager with Google Analytics for the Sana webstore. For more information about Google Tag Manager features and tools, and how to set up them, refer to the official Google documentation.

How to set up Google Tag Manager for the Sana webstore?

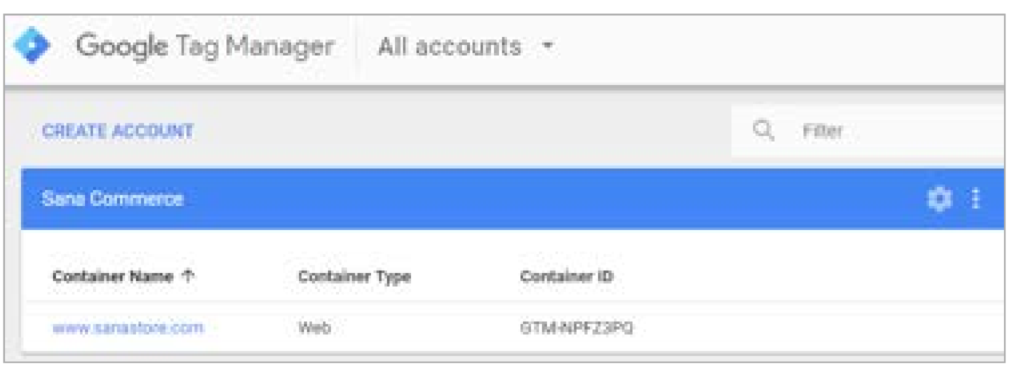
Step 1: Create Google Tag Manager account. Enter the account name and then click **Continue**.



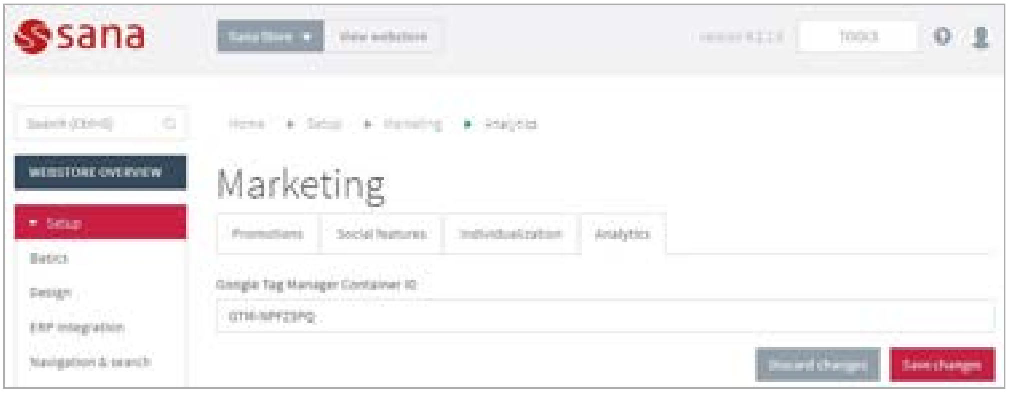
Step 2: Set up Google Tag Manager container. Enter the container name and select the "**Web**" type of content. Click "**Create**".



When the container is created, you will see the container ID in the following format **GTM-XXXXXXX**. It is automatically generated by GTM. For more information, see "Setup and installation".



Step 3: Copy the container ID. In Sana Admin click: **Setup** > **Marketing** > **Analytics**. Enter the container ID in the "**Google Tag Manager Container ID**" field.



Set up Google Analytics via Google Tag Manager

Google Tag Manager integrated with Google Analytics reduces errors, allows to quickly deploy tags on your webstore and thus makes the tracking procedure easier.

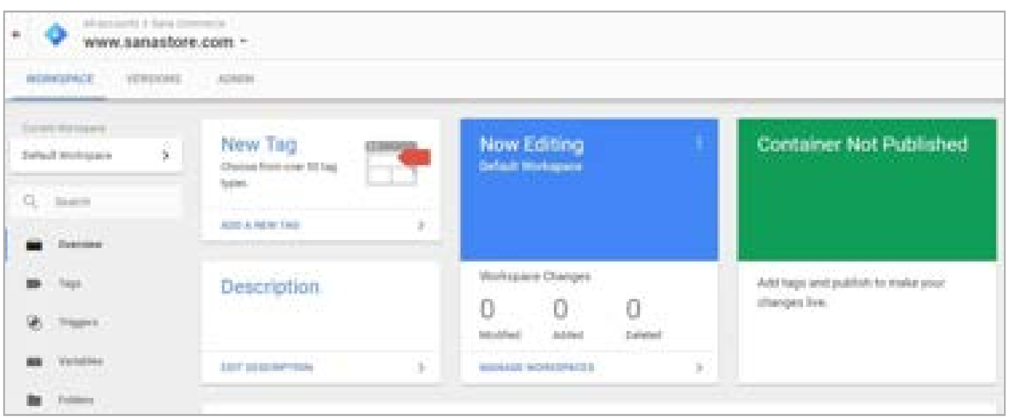
Google Analytics is a free analytics tool that enables you to gather all kind of information and generate reports that will help you with your marketing.

Integrating your webstore with Google Analytics is a simple process that will give you access to the detailed statistics of the traffic in your webstore, like page views, webstore visitors, transactions, users interactions with your webstore content, and their shopping behavior.

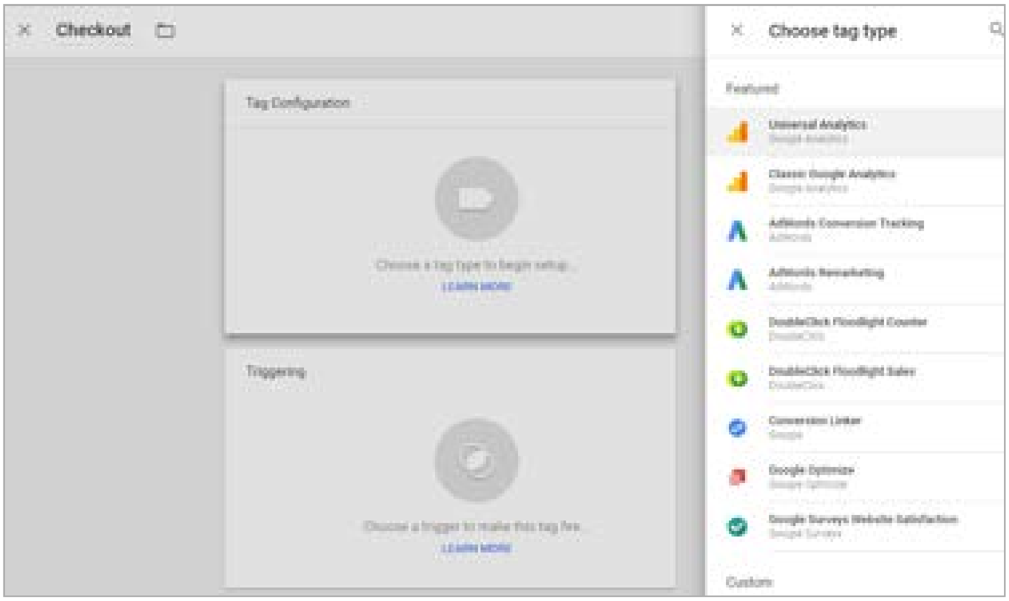
To start using Google Analytics:

Step 1: In Goggle Tag Manager, select your account.

Step 2: Create a new tag. You can do this either from the workspace or from the navigation menu on the left.



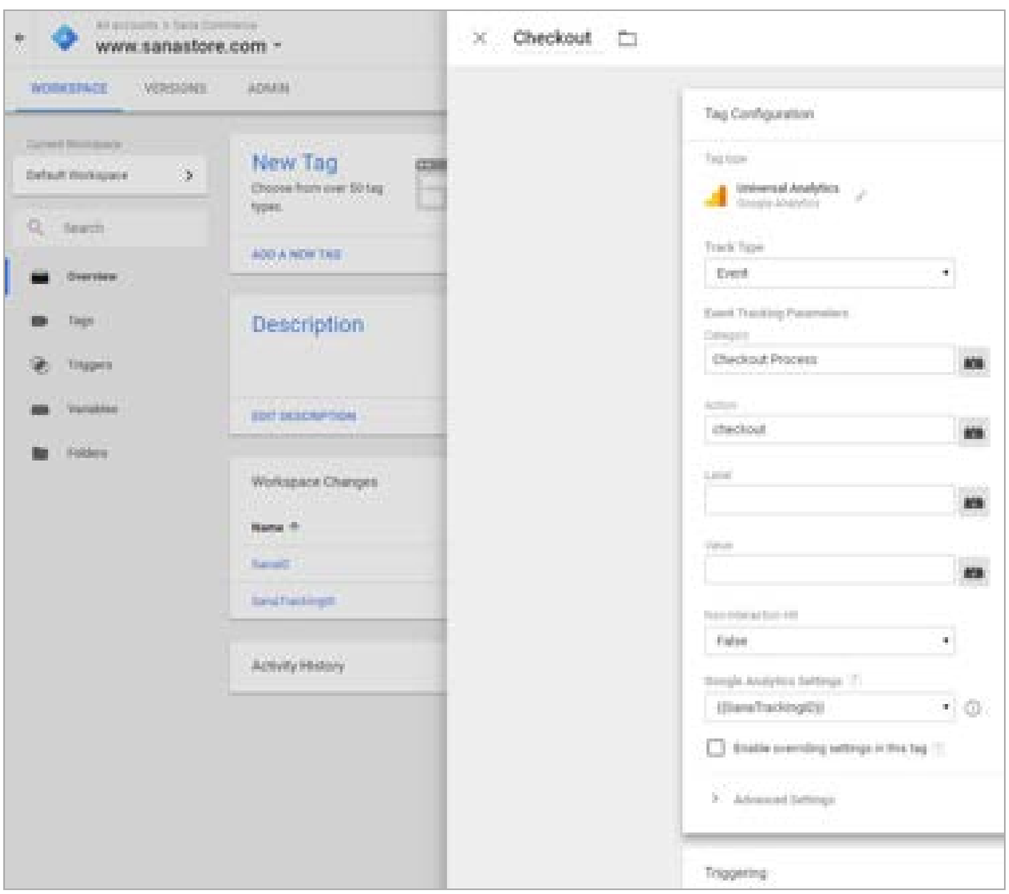
Step 3: Enter the tag name and choose the "**Universal Analytics**" tag type.



Step 4: Select the **Track Type**.

For basic Google Analytics tracking, add a single Google Analytics tag and select **Page View** as the track type. Add a trigger to fire the tag on all pages. If basic tracking is all you need, you'll just add this single Google Analytics tag. However, if you track events or ecommerce transactions, you'll need to add additional Google Analytics tags.

The most suitable track type for ecommerce tracking is **Event** tracking, which is used to track a specific action or event, such as a button click. Below you can see the list of events that are supported by the Sana webstore and which you can set up in Google Tag Manager.



Step 5: When the **Event** track type is used, enter **Category** name and **Action**. The category name can be anything that reflects the action you want to track. The **Action** value is used to name the type of event or interaction you want to track for a particular web object.

The table below provides the list of actions which can be tracked on the Sana webstore.

Action	Description
impression	Triggers on the product list and search results pages, and when the last viewed products are shown. Measured when the page loads and is sent with the initial page view.
detail	A view of products details.
productClick	A click on a product or product link for one or more products.
addToCart	Adding one or more products to a shopping cart.
removeFromCart	Remove one or more products from a shopping cart.
checkout	Initiating the checkout process for one or more products.
checkoutOption	Sending the option value for a given checkout step.
purchase	The sale of one or more products.

Step 6: In the "**Google Analytics Settings**" field, select the existing or create a new Google Analytics Settings Variable. It contains your Google Analytics Tracking ID. All settings from that variable will be applied to your tag.

Google Analytics Settings Variables enable you to easily reuse and maintain settings across tags. If necessary, you can configure settings for a certain tag independently by selecting the checkbox "**Enable overriding settings in this tag**". If you don't select a Settings Variable, you must set your Tracking ID via the override settings.

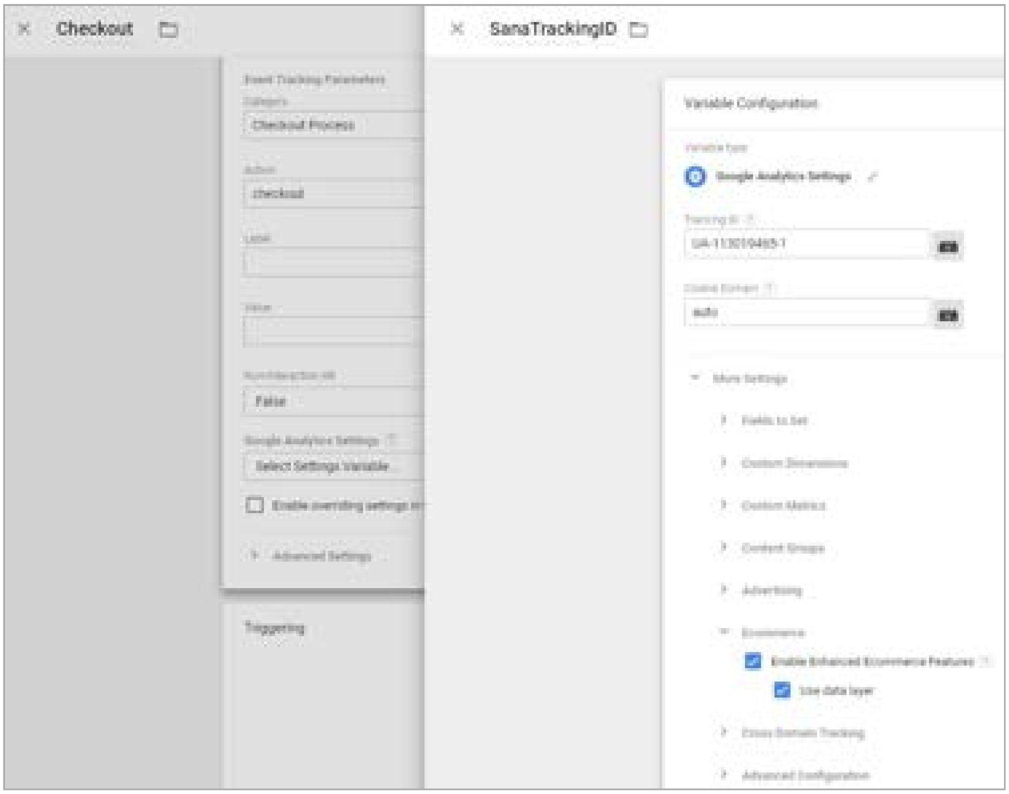
When you create a new Google Analytics Settings Variable, go to: **More Settings** > **Ecommerce**. Enable the options "**Enhanced Ecommerce Features**" and "**Use data layer**".

NOTE

Enabling **ecommerce features** is important to track ecommerce-related interactions. This will allow to see when customers have added the products to the shopping cart, when they have started the checkout process, and when they have completed a purchase.

If you do not see any ecommerce data in your Google Analytics account, you could try an alternative solution for step 6. In that case, we recommend keeping the Google Analytics Settings variable empty, select the checkbox "**Enable overriding settings in this tag**", and add your **Google Analytics Tracking ID**. Please, don't forget to enable also the **Enhanced Ecommerce Features** and **Use data layer** under the **Advanced Settings** menu item.

For more information, see "Deploying Google Analytics".



NOTE

Please, note that Google Analytics accepts only integers as the product quantity for sales orders. If your webstore also supports decimal quantities for products (e.g. customers can order 0.5 piece of a product), these numbers will be rounded to the closest integer and sent to Google Analytics. Example: 0.5 piece will be sent to Google Analytics as 1 piece.

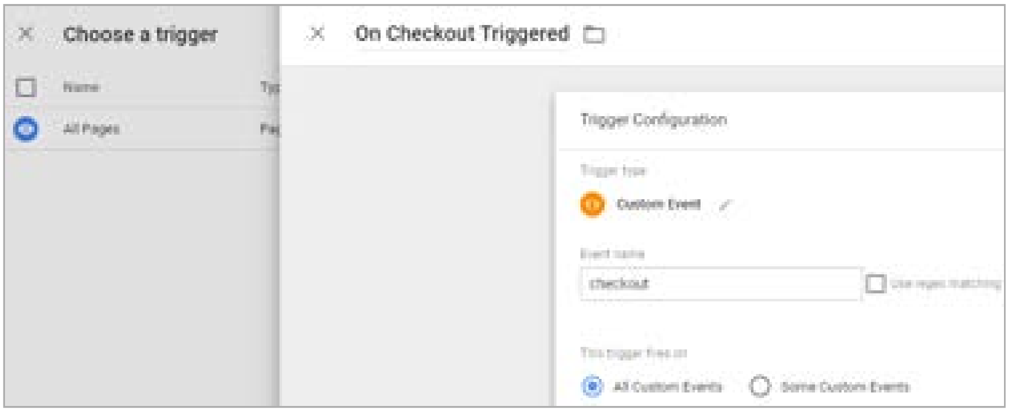
At the moment there is an issue that 0.5 piece of a product is rounded to 0 and such products are not shown in the sales order transactions in Google Analytics. But all other data of the sales transactions, like revenue, is calculated correctly in Google Analytics. The issue with rounding 0.5 piece of a product to 0 will be fixed in the next Sana release.

Step 7: Choose your firing triggers. The best trigger for event tracking is "**Custom Event**" with the expected event name, but you can select other triggers suitable for your scenario.

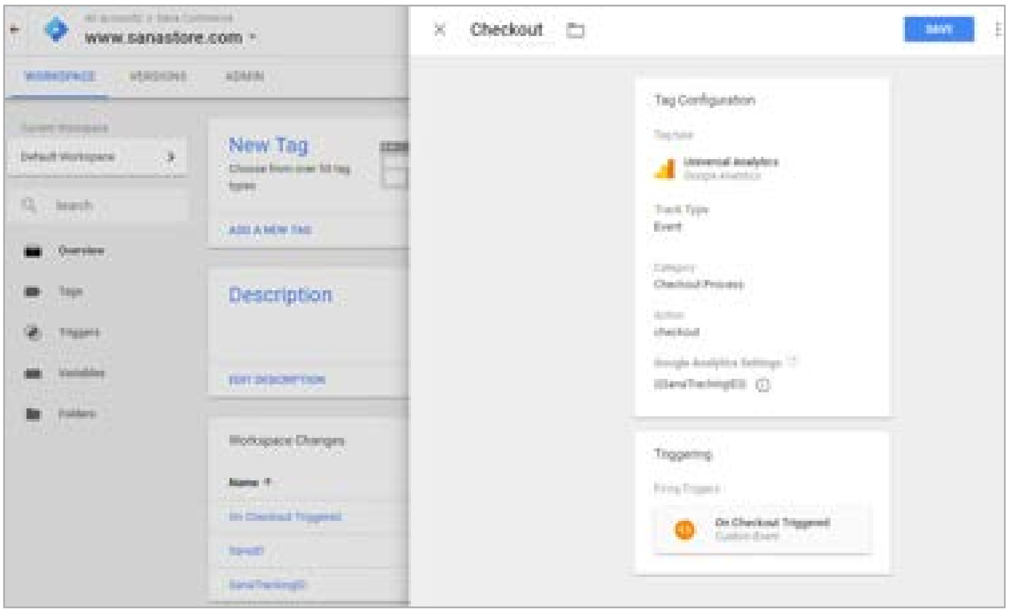
To add the "**Custom Event**" trigger, create a new trigger of the "**Custom Event**" trigger type.

Enter the title of the trigger and **Event name**. The event name should be the same as the name of the action.

For more information about tag firing, see "Triggers".



Step 8: Save the tag.



This way you can create all the necessary tags and triggers. When you are ready, you can preview and debug the container, and publish your changes.

When Google Tag Manager is configured with Google Analytics, you can check the shopping and purchasing behavior of your webstore visitors and customers. Each time when a user performs some action in the webstore, like views the product details or adds a product to the shopping cart, a certain event is triggered, and the information about this action is sent to and tracked by Google Analytics. The shopping analysis reports give you insight into the shopping activities, like product and product list views, adding and removing products from shopping carts, initiated, abandoned, and completed transactions.

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Product Pages

Watch the video

In Sana Admin click **Web pages** > **Product pages**.

Under the **Product pages** menu item you can see the list of all products from the database.

Products cannot be created or removed from Sana Admin. The core product data, like title, item number, price, visibility of a product in the webstore are all managed in the ERP system. Product pages in Sana Admin are used to manage product details.

When a page is filled in with content you can preview it to see how it will look in the webstore before saving it.

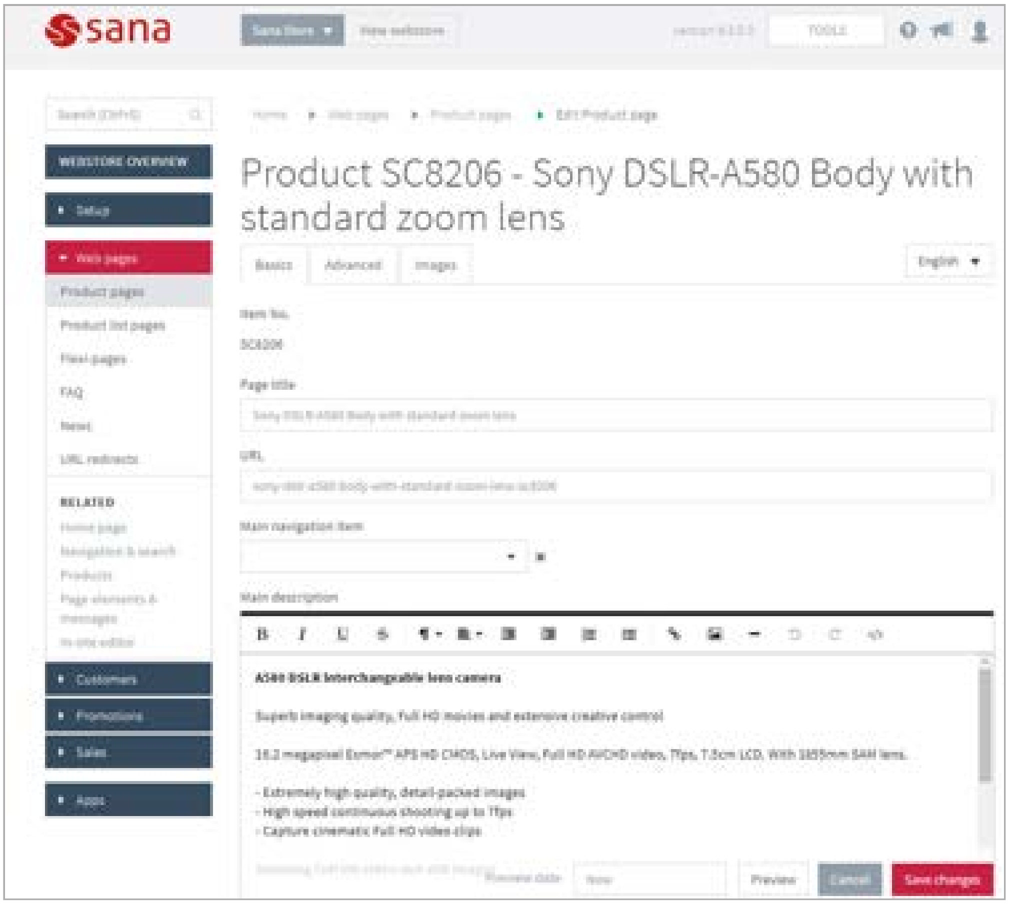
You can search for a product page by item number or title of a product. The product pages can be also sorted by item numbers.

Create product description

To manage product details, find the necessary product and click **Edit**.

The tables below provide the description of the product page fields.

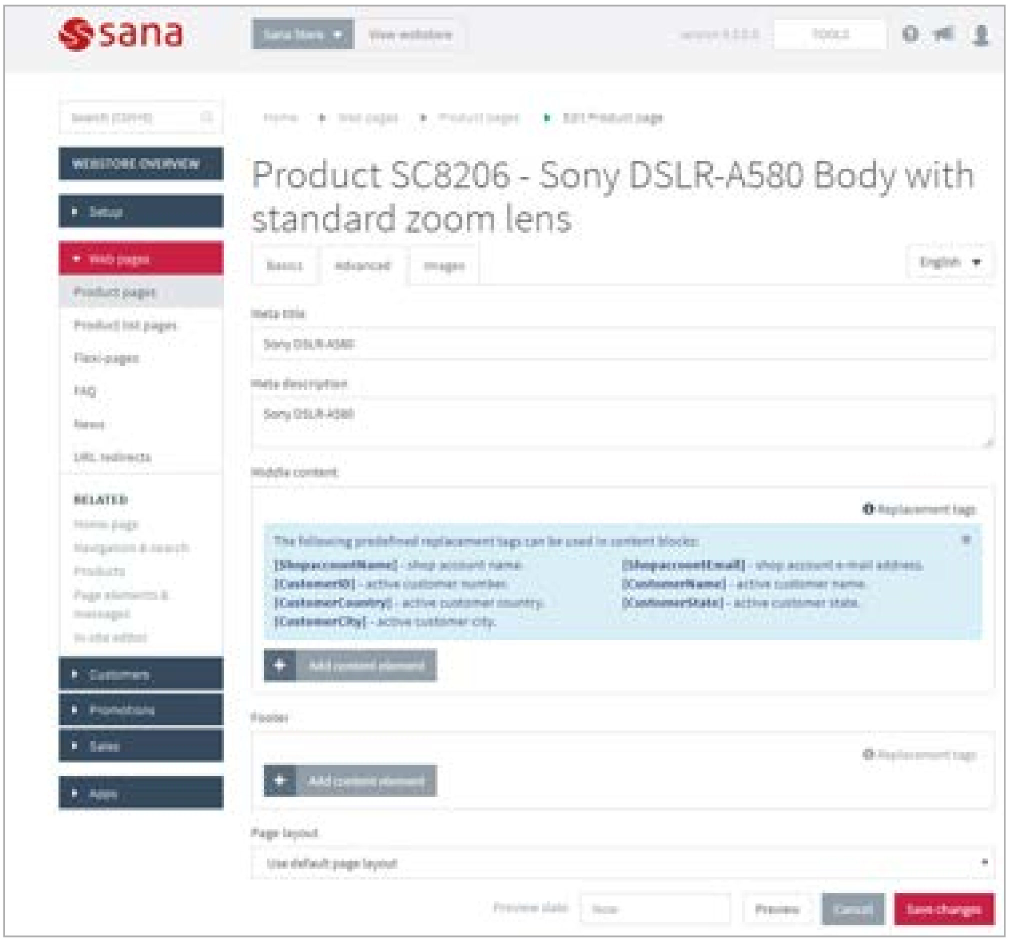
Basics



Field	Description
Page title	Enter the page title. It is shown on the product details page in the webstore. By default the product name from the ERP system is shown. If you enter the page title, it will override the product name from the ERP system. The product name from ERP will be redefined only on the product details page. In all other places the product name from ERP will be still used.
URL	Enter the custom product page URL. Specify the part of the product page URL which will be used after your webstore address. **Example**: • bike • roadbike/bicycle By default, if you leave the URL field empty, the product title and the item number from ERP will be used in the product URL. If there is a dash "-" character in the item number in ERP, it will be automatically replaced by a double dash "--" in the product URL due to the internal Sana URL building mechanism.
Main navigation item	Specify the main navigation item. This is the navigation path to a product. The canonical product URL is determined by the main navigation item.
Main description	Add the product description. Use HTML editor to format the text and apply styles, insert links and add images. Product description can be also added in the ERP system, but Sana Commerce provides HTML editor for better text enrichment. The product description from Sana Admin has higher priority.

	For more information about product description in Microsoft Dynamics NAV, see "Item Description". For more information about product description in Microsoft Dynamics AX, see "Product Description". For information about product description in Microsoft Dynamics 365 Business Central, see "Item Description". For information about product description in Microsoft Dynamics 365 for Finance and Operations, see "Product Description". For more information about product description in SAP Business One, see "Item Description". For more information about product description in SAP, see "Product Description".

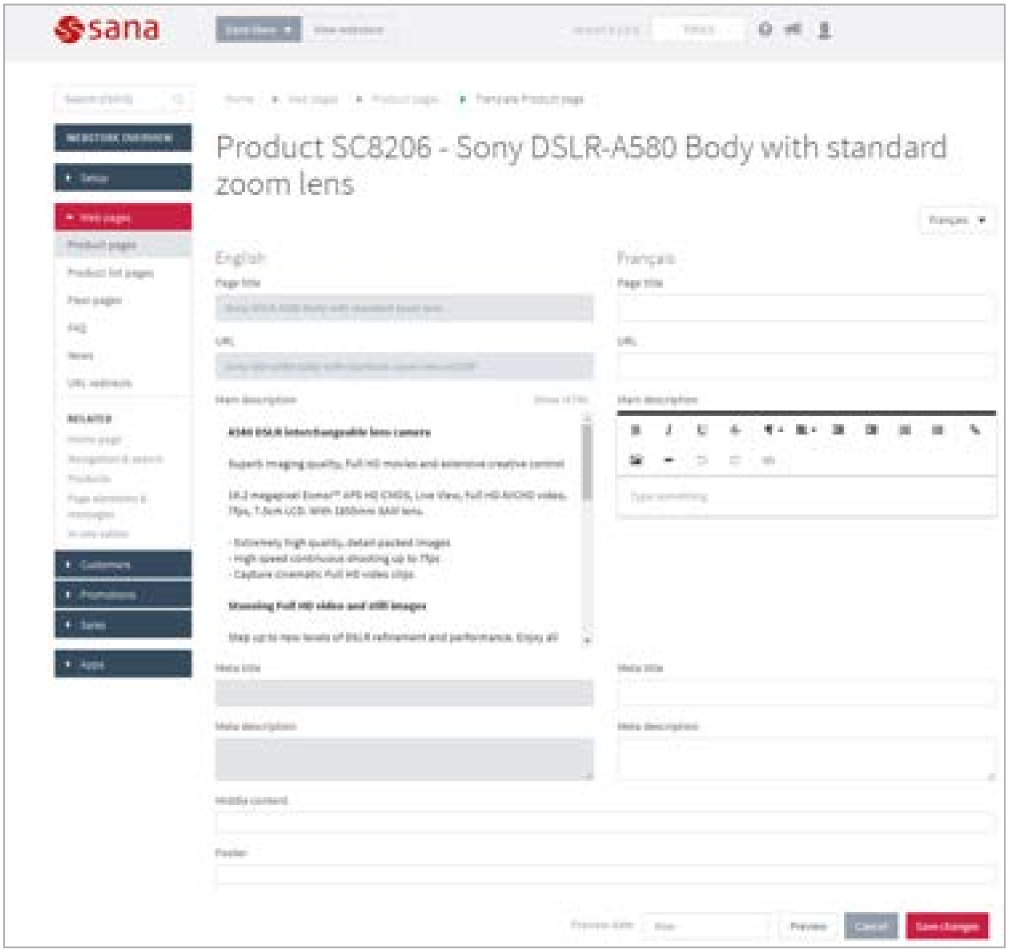
Advanced



Field	Description
Meta title	Add meta title and meta description to the product page. Meta title is shown in the Web browser on a tab of the opened page. If the **Meta title** field is empty, the title of the opened page and the name of the webstore set in the Sana Admin settings will be shown on the tab of the Web browser. If you enter a meta title, you can also use the [SHOPNAME] replacement tag. This tag will be automatically replaced with the webstore name set in the Sana Admin settings.
Meta description	Meta description describes your page to search engines. It should provide concise explanation of the web page contents. Meta description is used on search engine result pages to display short description for a given page.

	Meta title and meta description are important factors for a successful search engine optimization of your webstore.
Middle content **Footer**	In the **Middle content** and **Footer** fields you can add some extra content that will be shown in the middle of the product details page and in the footer. Use content elements to add the necessary content.
Page layout	Use **Page layout** to redefine the product details page layout set on the customer level. Under the **Design** menu item you can define page layouts per customer group that will be used for all product pages. But you can also redefine page layout per individual product details page. For more information about page layouts that can be set on the customer level, see "Design".

Translate product description

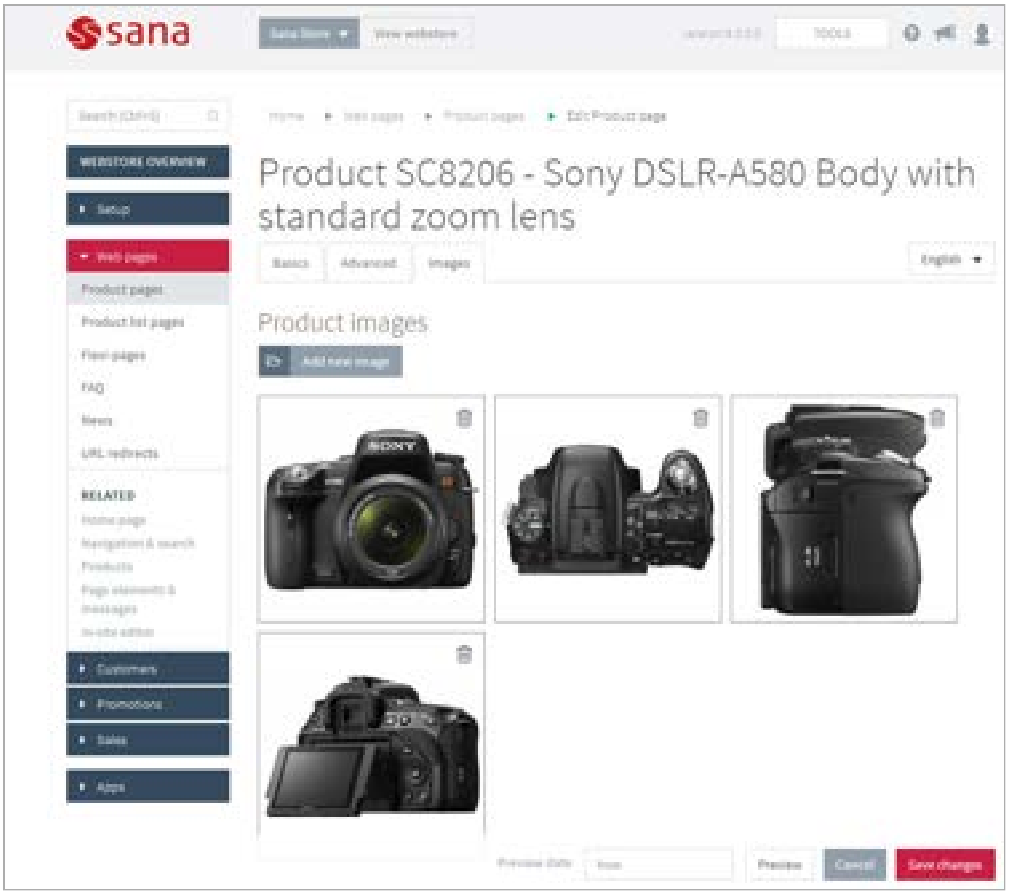


Under the **Product pages** menu item you can select a language and translate any product page to the selected language, if your webstore is multi-lingual. Two columns **Title** will be shown, when the language is selected. The first column stores the product pages in the default language (English), the second column holds the translated product pages into the selected language. If in the second column you see a greyed out link **Translate**, this means that there is no translation for the related product page. You can click **Translate** to translate the content of the related product page.

You can also translate any existing product page from its content management page. Locate the product page you want to translate and click **Edit**. On the product page select a language into which you want to translate its content.

When you translate the product page it is presented in two columns. The first column holds the product page content in the default language (English) and it is not editable, while in the second column you can provide translation to the product page title, URL, main description, meta title and meta description, middle content and footer.

Product images



From the product page you can also add product images. Click **Add new image** to upload product images. You can change the order of product images simply by dragging and dropping them. In the webstore, in the image slider on the product details page, product images are shown in the order they are placed in Sana Admin. For more information, see "Product Images".

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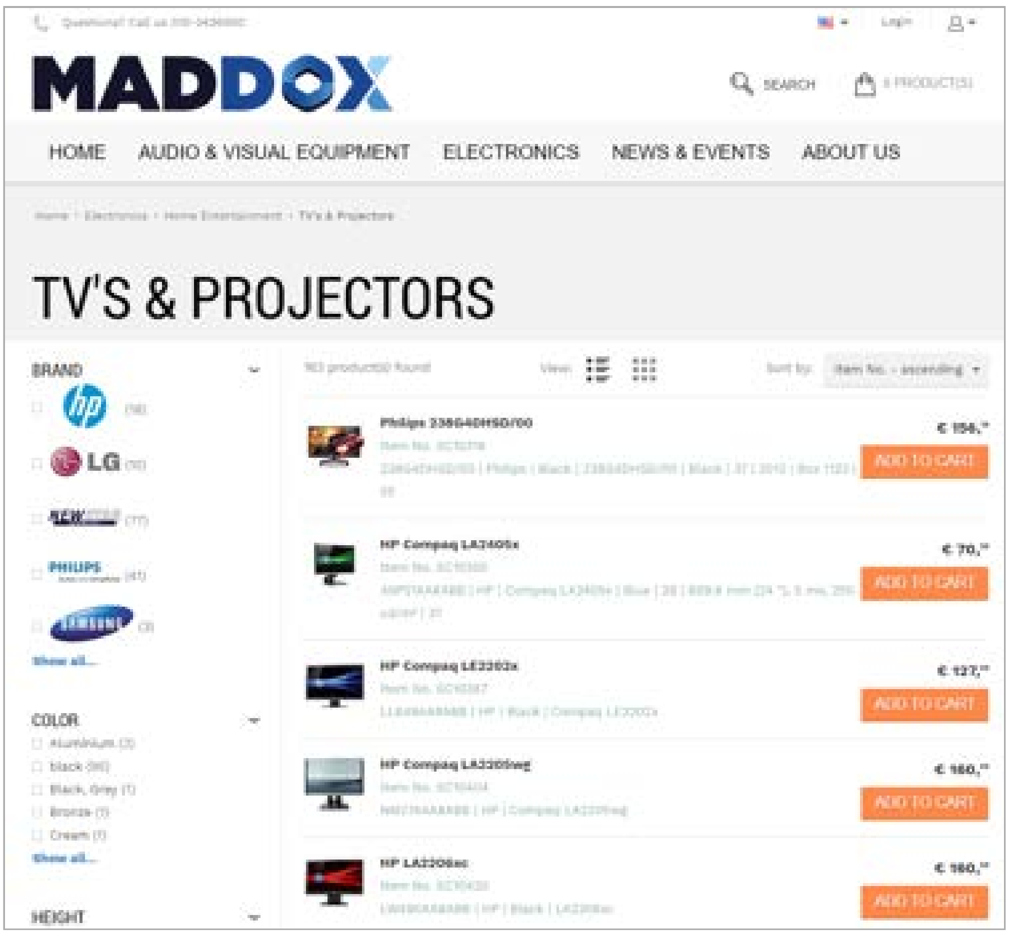
Product List Pages

Watch the video

Choosing the best way to display products in the webstore is a really important step, since the way you display your products can attract attention of the customers and make them interested in what you are selling.

Sana Commerce provides a product list page template that is used to display your webstore catalog in a number of ways - choose a list view or grid view, configure filtering of products, for example by color, size or brand, show or hide product images thumbnails, allow customers buy multiple items just from one page by enabling order list mode, sort products, for example by title or price.



Create a product list page

To create a product list page in Sana Admin click: **Web pages** > **Product list pages**.

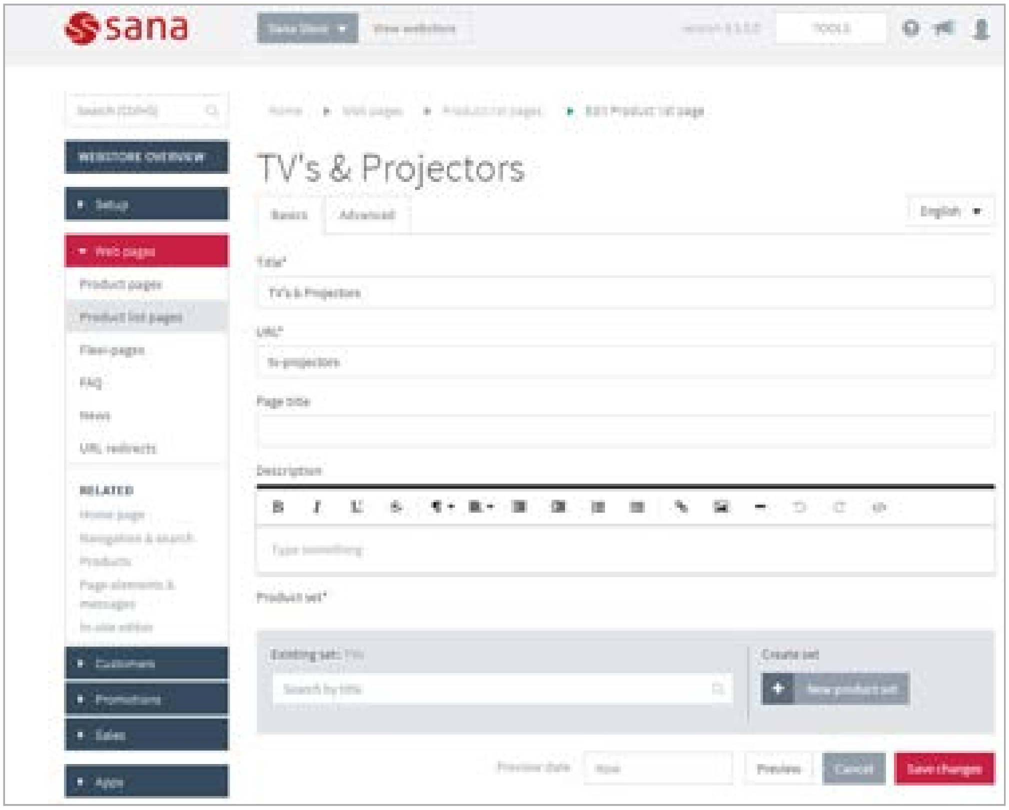
Here you can create product list pages, edit or delete, translate into any available language, copy to another webstore in case of a multi-store solution, view a product list page in a webstore and set a product list page as a home page.

When a page is filled in with content you can preview it to see how it will look in the webstore before saving it.

In Sana Admin you can search for a product list page by title and URL. You can also sort the product list pages by title and URL.

The tables below provide the description of the product list page fields.

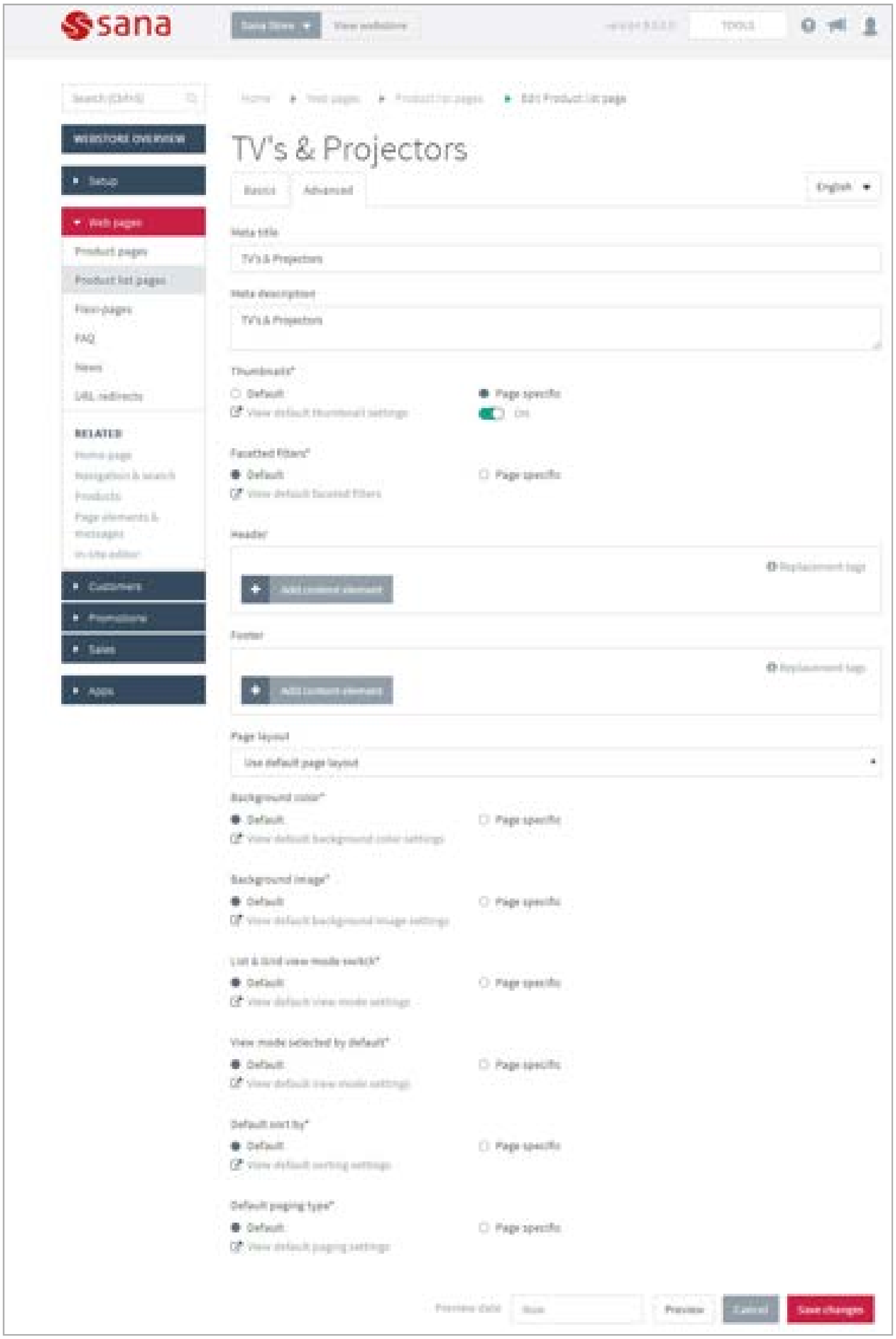
Basics



Field	Description
Title	Enter the title of the product list page.
URL	Enter the product list page URL. You should specify the part of the product list page URL which will be used after your webstore address. **Examples**: • nowonsale • nowonsale/winter_collection **URL** is a required field only for the product list page in the default language (English). For the product list pages in other languages the **URL** field is optional. If you do not specify it, the URL of the default language (English) will be used.
Page title	Enter the title of the product list page. If **Page title** is specified, it will override the one specified in the **Title** field and will be shown at the top of the product list page in the webstore. In the webstore navigation the product list page title that is specified in the **Title** field is always used.
Description	Add product list description. Use HTML editor to format the text and apply styles, insert links and add images. On the product list page the content from the **Description** field is shown under the page title.

Product set	Add an existing product set to the product list page or create a new one. To add an existing product set you can search it by title. If you create a new product set it will be automatically linked to the product list page. In the webstore on the product list page, products are presented in the list view and grid view.

Advanced



Field	Description
Meta title	Add meta title and meta description to the product list page. Meta title is shown in the Web browser on a tab of the opened page. If the **Meta title** field is empty, the title of the

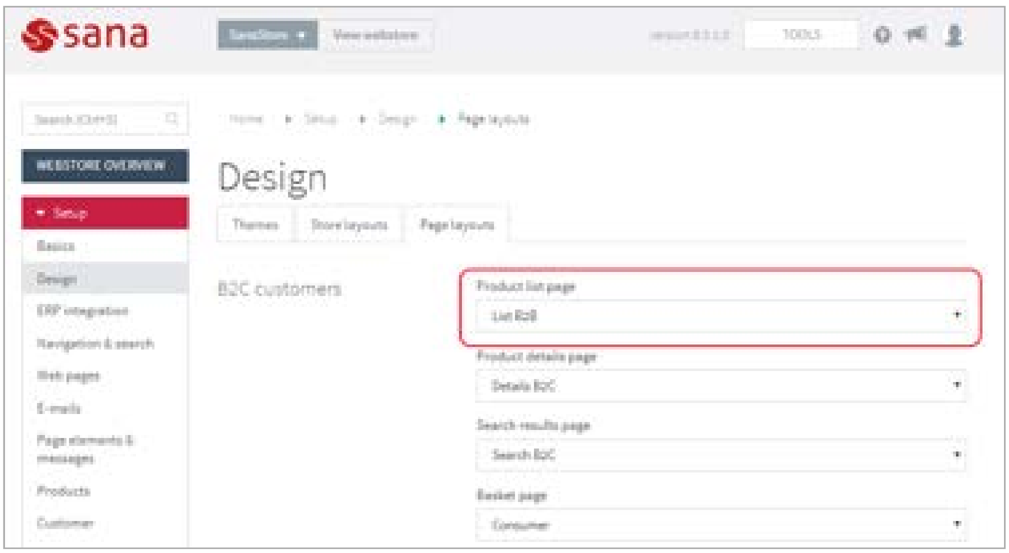
	opened page and the name of the webstore set in the Sana Admin settings will be shown on the tab of the Web browser. If you enter a meta title, you can also use the [SHOPNAME] replacement tag. This tag will be automatically replaced with the webstore name set in the Sana Admin settings.
Meta description	Meta description describes your page to search engines. It should provide concise explanation of the web page contents. Meta description is used on search engine result pages to display short description for a given page. Meta title and meta description are important factors for a successful search engine optimization of your webstore.
Thumbnails	Use **Thumbnails** to show/hide product image thumbnails on the product list page. You can either inherit the default setting which is used for all product list pages or redefine it for any product list page.
Faceted filters	Use either default faceted filters configured in the search settings or configure the page specific filters to be shown on the product list page. Using the page specific faceted filters you can set up filtering for each product list page individually. If you set up page specific faceted filters use the **Followed by robots** setting to allow or forbid search engine crawlers to follow the facet items on the product list page.
Header **Footer**	In the **Header** and **Footer** fields you can add some extra content that will be shown in the header of the product list page and in the footer. Use content elements to add the necessary content.
Page layout	Use **Page layout** to redefine the product list page layout set on the customer level. Under the **Design** menu item you can define page layouts per customer group that will be used for all product list pages. But you can also redefine page layout per individual product list page. For more information about page layouts that can be set on the customer level, see 'Design'.
Background color	Using this field you can change the background color of the product list page area under the main menu, where you can see the title of the product list page and breadcrumb. You can either inherit the default setting which is used for all product list pages or redefine it for any product list page.
Background image	Using this field you can add the background image to the product list page area under the main menu, where you can see the title of the product list page and breadcrumb. You can either inherit the default setting which is used for all product list pages or redefine it for any product list page.
List & Grid view mode switch **View mode selected by default**	Products on the product list page can be presented in two modes: list or grid. Using these options you can give a choice to a customer which mode to use or you can disable it and select the mode which should be used by default. You can either inherit the default settings which are used for all product list pages or redefine it for any product list page.
Default sort by	A customer can sort the products on the product list pages. Data which should be used for sorting can be configured in the search settings in Sana Admin. Using this option you can select which data should be used for sorting by default, for example product titles,

	prices or item numbers. You can either inherit the default setting which is used for all product list pages or redefine it for any product list page.
Default paging type	Using this option you can select the type of paging which should be on the product list page. On a page a customer can see 10 products. To load more products a customer can use paging. Paging can be presented as links with the page numbers, a button to show next 10 products, or products can be automatically loaded when a customer scrolls down. You can either inherit the default setting which is used for all product list pages or redefine it for any product list page.

Page layouts

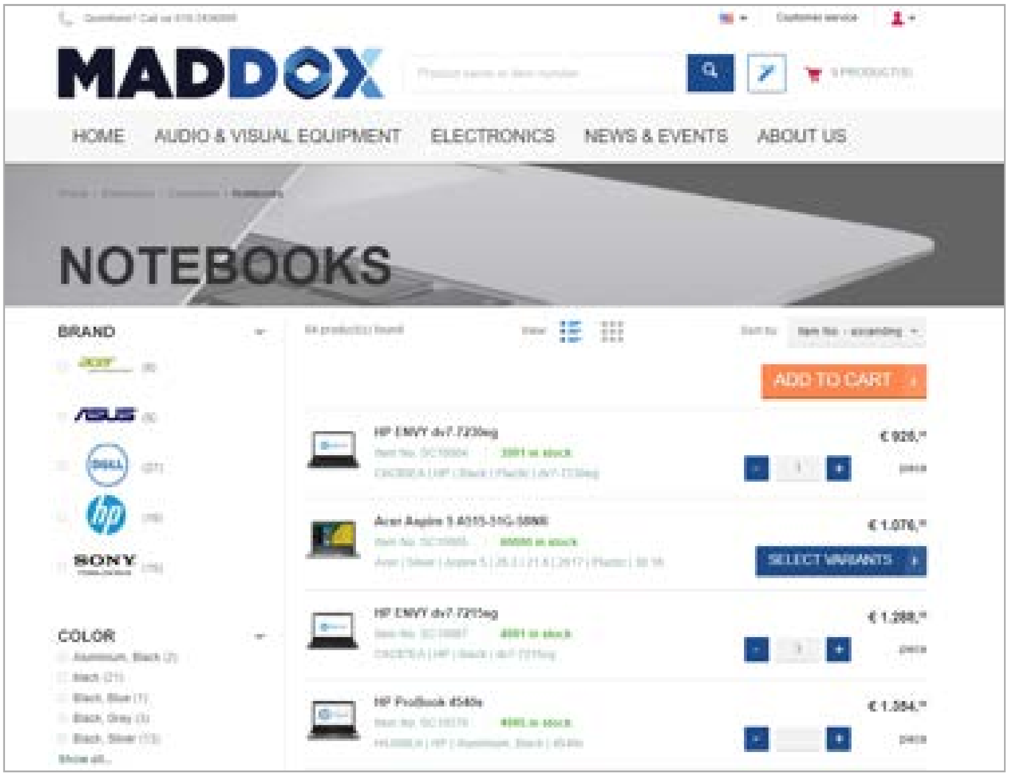
Sana provides two page layouts for product list pages - B2B and B2C. Each product list page layout has a predefined set of features.

To set up page layouts for the product list pages per customer type, in Sana Admin click: **Setup** > **Design** > **Page layouts**



For more information, see "Design".

B2B customers usually order a lot of products at once. Therefore, when you select the product list page layout "List B2B", customers can add several products to the shopping cart at once from a single page. To add several products to the shopping cart from a single product list page, customers need to specify quantity for all products they want to buy and click "Add to cart". The "Add to cart" button is located at the top and at the bottom of the product list.

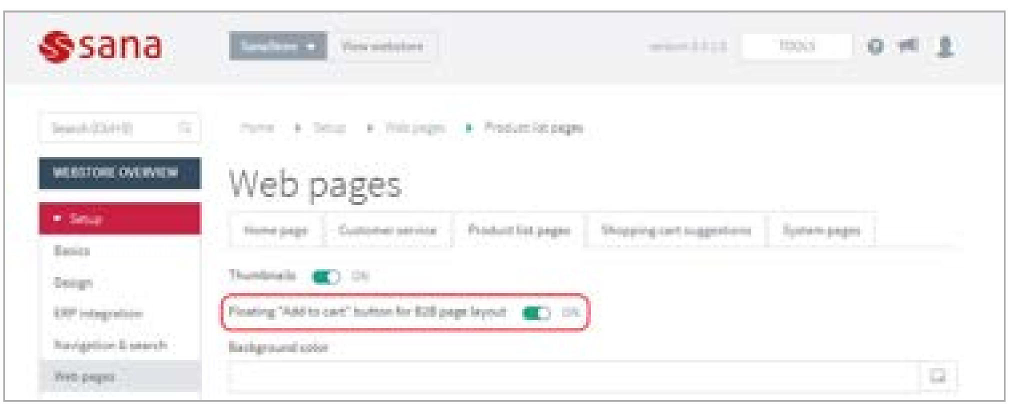


To simplify the process of adding products to the shopping cart from the product list page and make it more convenient for your customers, you can make the "Add to cart" button float, when a customer scrolls the page.

In Sana Admin click: **Setup** > **Web pages** > **Product list pages**. Enable the option **Floating "Add to cart" button for B2B page layout**.

NOTE

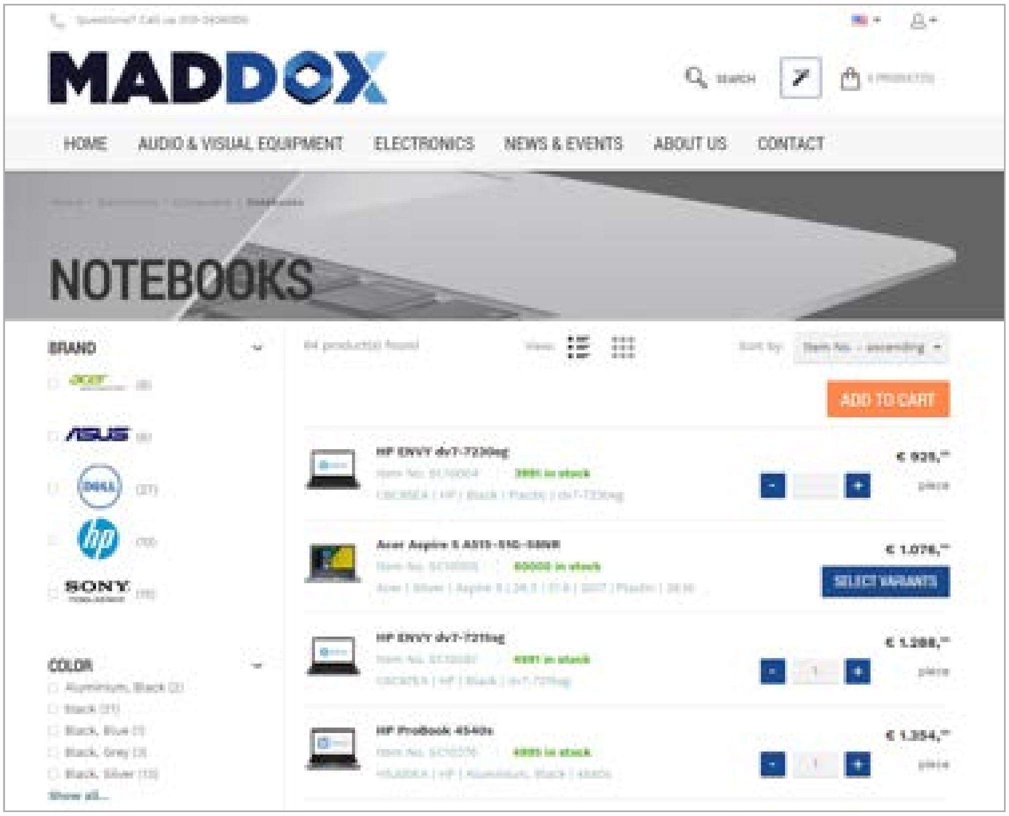
The option "Floating "Add to cart" button for B2B page layout" is available starting from Sana 9.3.1.



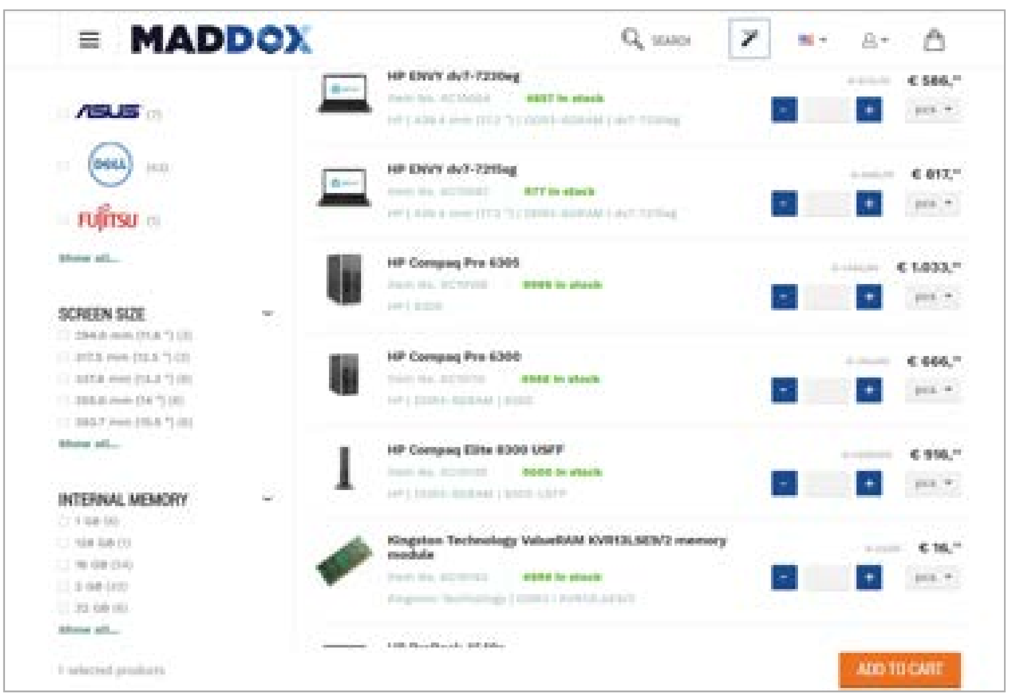
The floating "Add to cart" button works only for the B2B page layout and shows up on the product list page only when a customer selects at least one product or product variant and scrolls down the page. It has different presentation for the desktop and mobile layouts.

Below see how the "Add to cart" button is presented in the Sana web store in different layouts (desktop and mobile) in case the **Floating "Add to cart" button for B2B page layout** option is enabled and disabled.

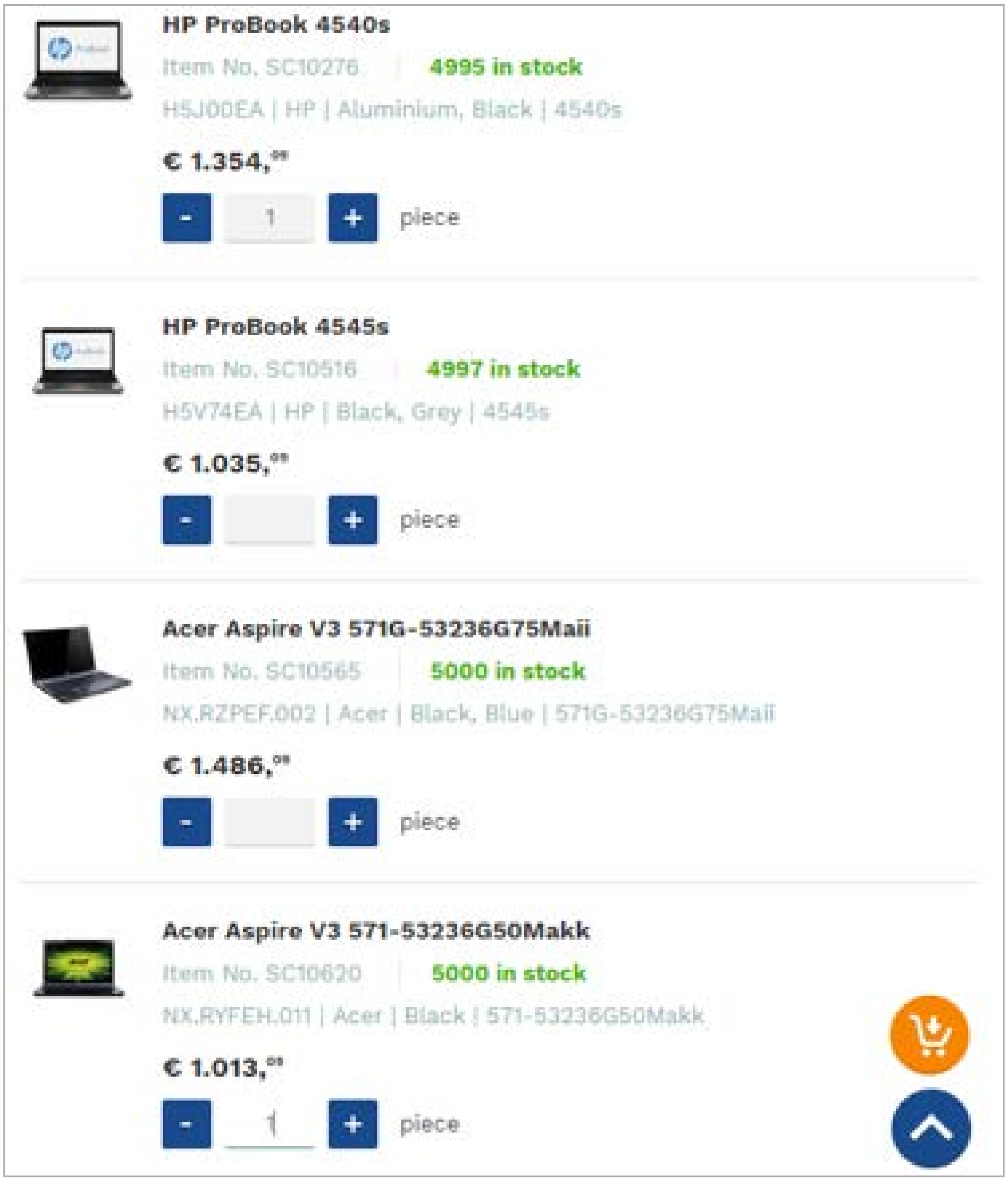
"Add to cart" button with fixed position



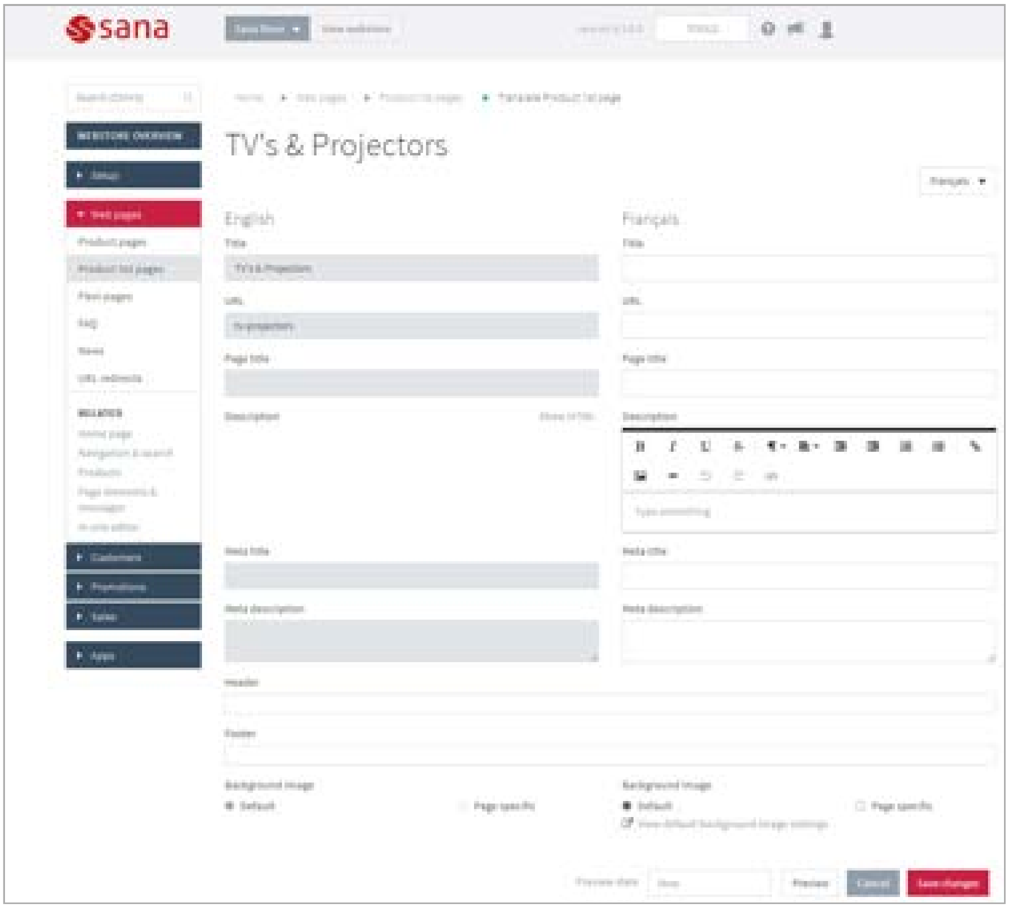
Floating "Add to cart" button (Desktop layout)



Floating "Add to cart" button (Mobile layout)



Translate a product list page



Under the **Product list pages** menu item you can select a language and translate any product list page to the selected language, if your webstore is multi-lingual. Two columns **Title** will be shown, when the language is selected. The first column stores the product list pages in the default language (English), while the second column holds the translated product list pages into the selected language. If in the second column you see a greyed out link **Translate**, this means that there is no translation for the related product list page.

You can also translate any existing product list page from its content management page. Locate the product list page you want to translate and click **Edit**. On the product list page select a language into which you want to translate its content.

When you translate the product list page content it is presented in two columns. The first column holds the product list page content in the default language (English) and it is not editable, while in the second column you can provide translation to the product list title, URL, page title, description, meta title and meta description, header and footer.

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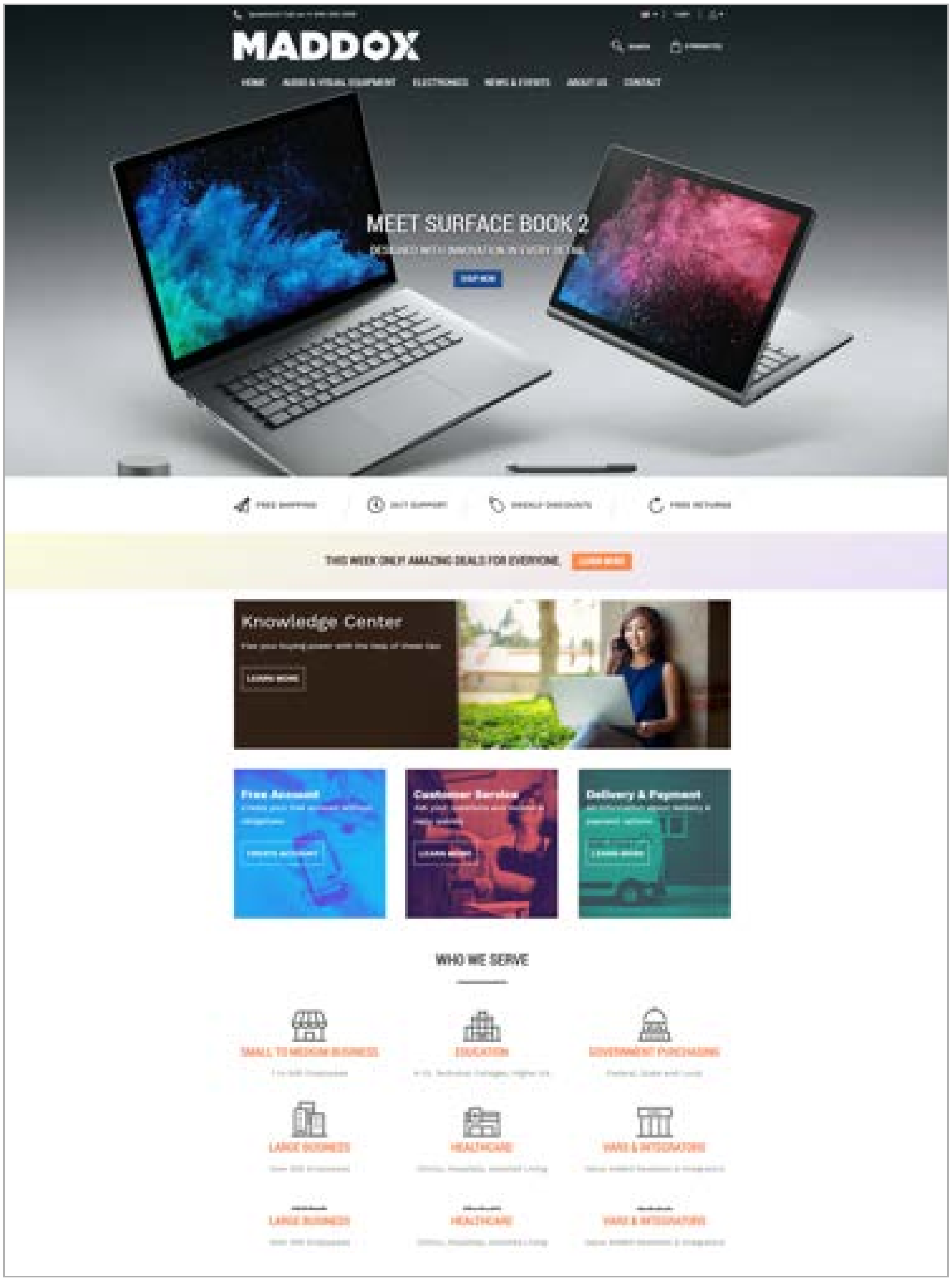
Flexi-pages

Sana Commerce comes with several default content and product pages that you can use to get started. Flexi-page is a content page that allows adding text using the HTML editor for better text enrichment, embedding videos and adding up to four image tiles with linked pages.



Create a flexi-page

The process of adding a new flexi-page is essentially the same for any type of page you create. Flexi-pages can be created in **Sana Admin** > **Web pages** > **Flexi-pages**.

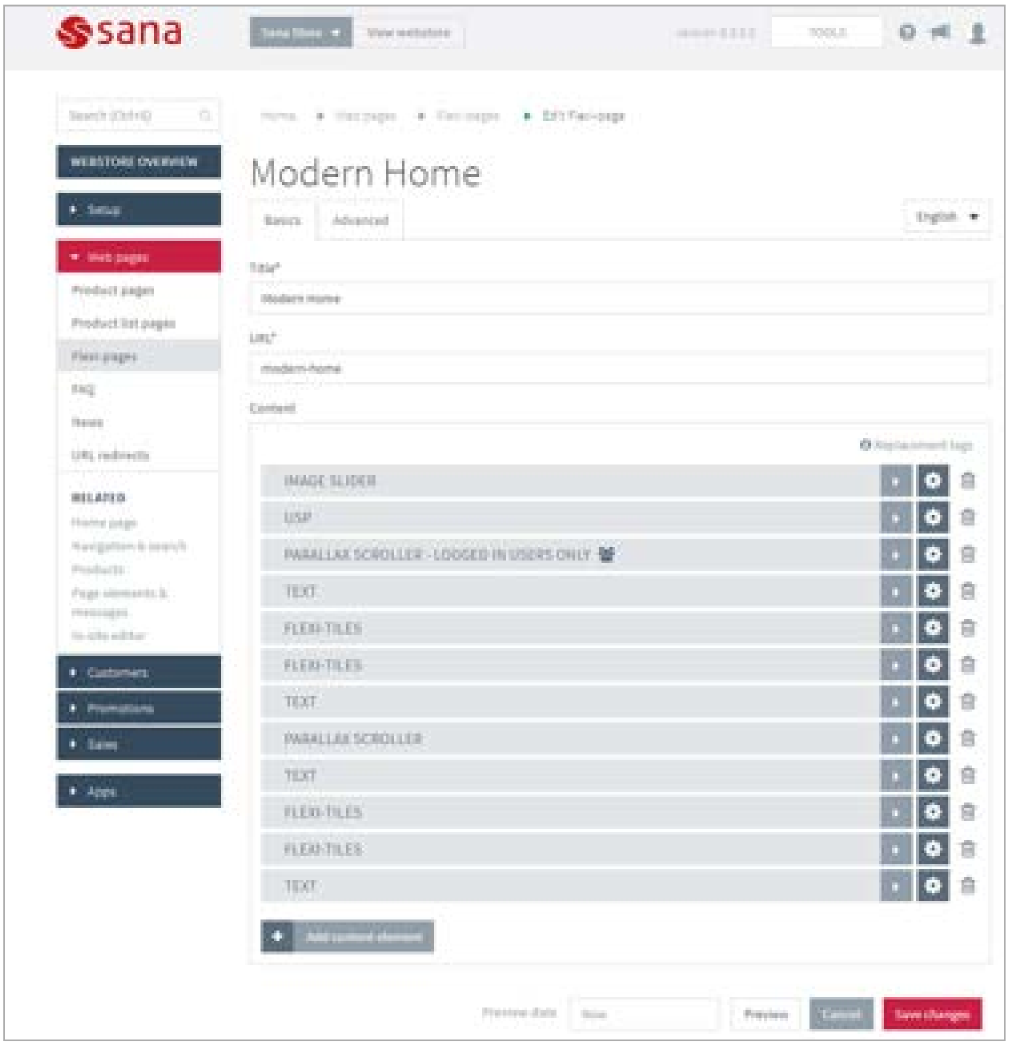
Here you can create flexi-pages, edit or delete, translate into any available language, copy to another webstore in case of a multi-store solution, view a flexi-page in a webstore and set a flexi-page as a home page.

When a page is filled in with content you can preview it to see how it will look in the webstore before saving it.

In Sana Admin you can search for a flexi-page by title and URL. You can also sort the flexi-pages by title and URL.

The tables below provide the description of the flexi-page fields.

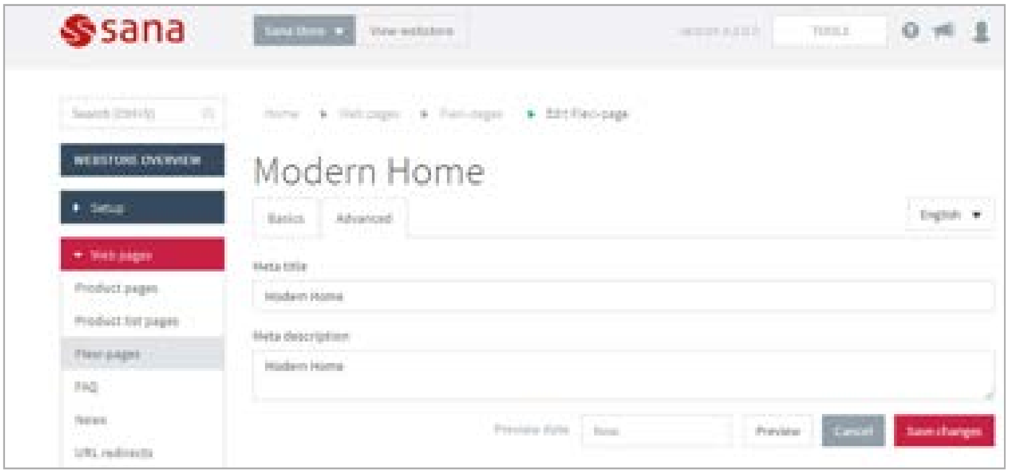
Basics



Field	Description
Title	Enter the flexi-page title.
URL	Enter the flexi-page URL. You should specify the part of the flexi-page URL which will be used after your webstore address. **Examples**: • nowonsale • wintersales/25%off

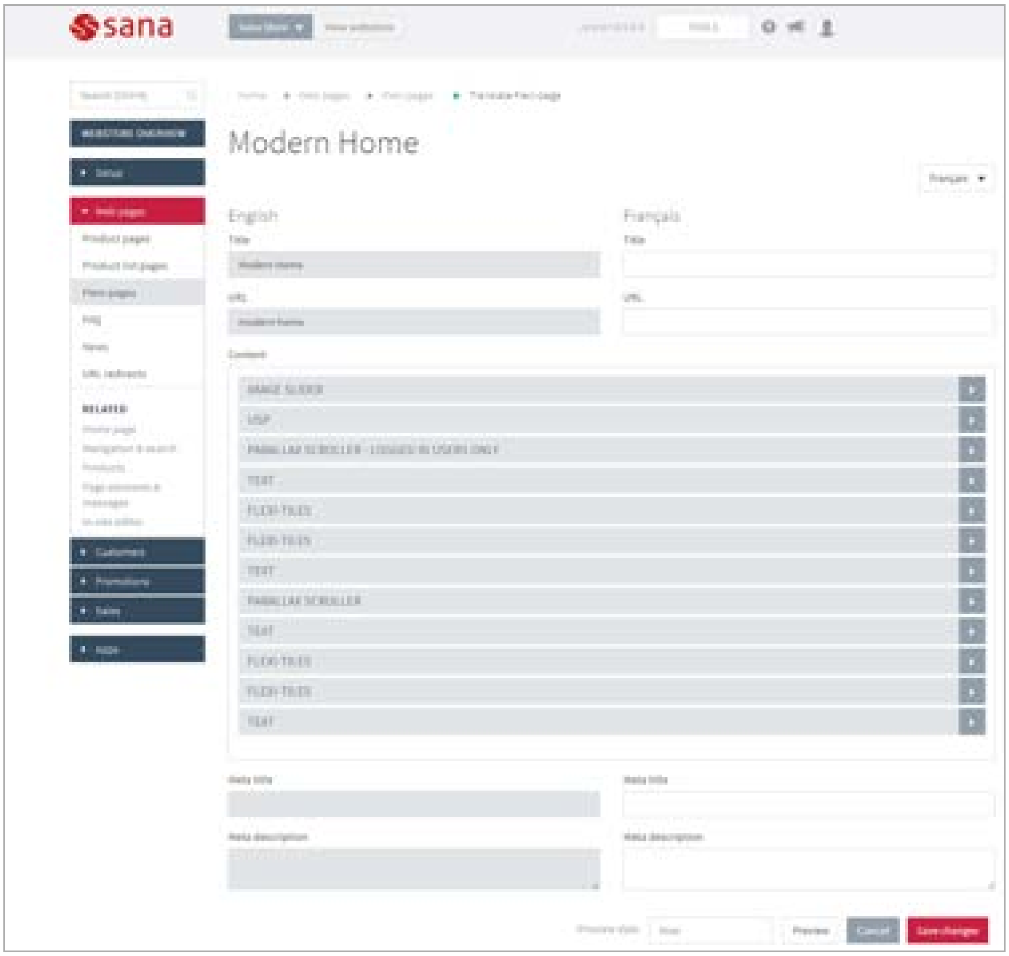
	URL is a required field only for the flexi-page in the default language (English). For the flexi-pages in other existing languages the **URL** field is optional. If you do not specify it, the URL of the default language (English) will be used.
Content	Fill in the flexi-page with the necessary content. Use content elements to create nice content.

Advanced



Field	Description
Meta title	Add meta title and meta description to the flexi-page. Meta title is shown in the Web browser on a tab of the opened page. If the **Meta title** field is empty, the title of the opened page and the name of the webstore set in the Sana Admin settings will be shown on the tab of the Web browser. If you enter a meta title, you can also use the [SHOPNAME] replacement tag. This tag will be automatically replaced with the webstore name set in the Sana Admin settings.
Meta description	Meta description describes your page to search engines. It should provide concise explanation of the web page contents. Meta description is used on search engine result pages to display short description for a given page. Meta title and meta description are important factors for a successful search engine optimization of your webstore.

Translate a flexi-page



Under the **Flexi-pages** menu item you can select a language and translate any flexi-page to the selected language, if your webstore is multi-lingual. Two columns **Title** will be shown, when the language is selected. The first column stores the flexi-pages in the default language (English), the second column holds the translated flexi-pages into the selected language. If in the second column you see a greyed out link **Translate**, this means that there is no translation for the related flexi-page. You can click **Translate** to translate the content of the related flexi-page.

You can also translate any existing flexi-page from its content management page. Locate the flexi-page you want to translate and click **Edit**. On the flexi-page select a language into which you want to translate its content.

When you translate the flexi-page content it is presented in two columns. The first column holds the flexi-page content in the default language (English) and it is not editable, while in the second column you can provide translation to the flexi-page title, URL, content elements, meta title and meta description. For the image tiles you can also inherit the navigation URL (internal page or external URL) from the source page or redefine it.

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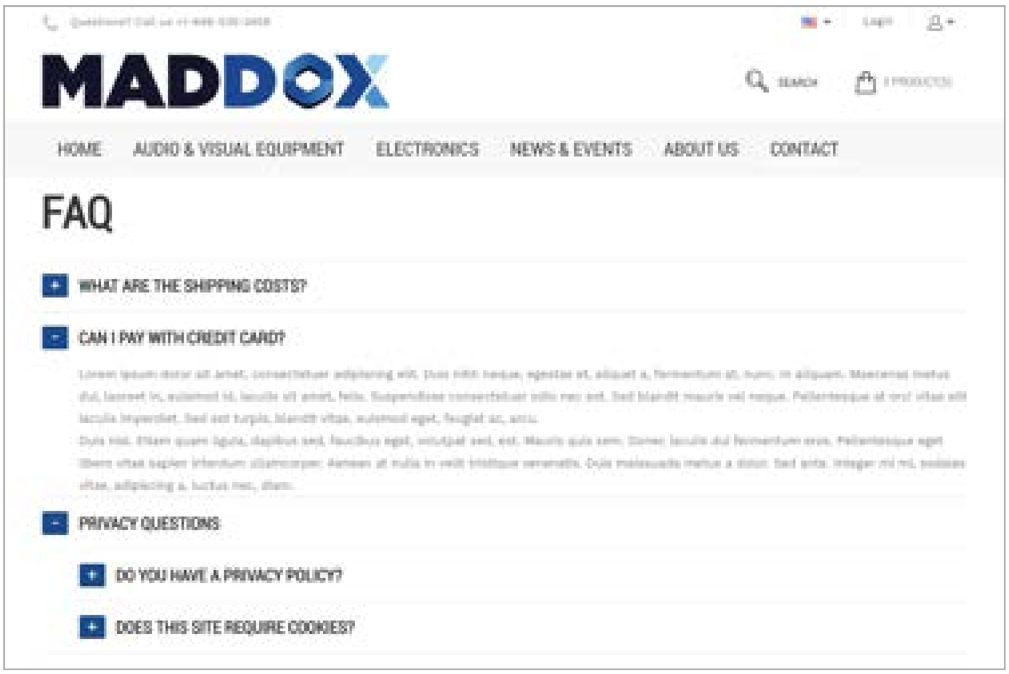
FAQ

Watch the video

FAQ (frequently asked questions) page type is used to make a list of questions and answers, which provides a better understanding of a particular topic. The FAQ page is very useful for listing the most common questions and answers about your webstore. For example, you can provide information about which payment and shipping methods are supported by your webstore, are there any discounts or special offers.



Create an FAQ page

To create an FAQ page in Sana Admin click: **Web pages** > **FAQ**.

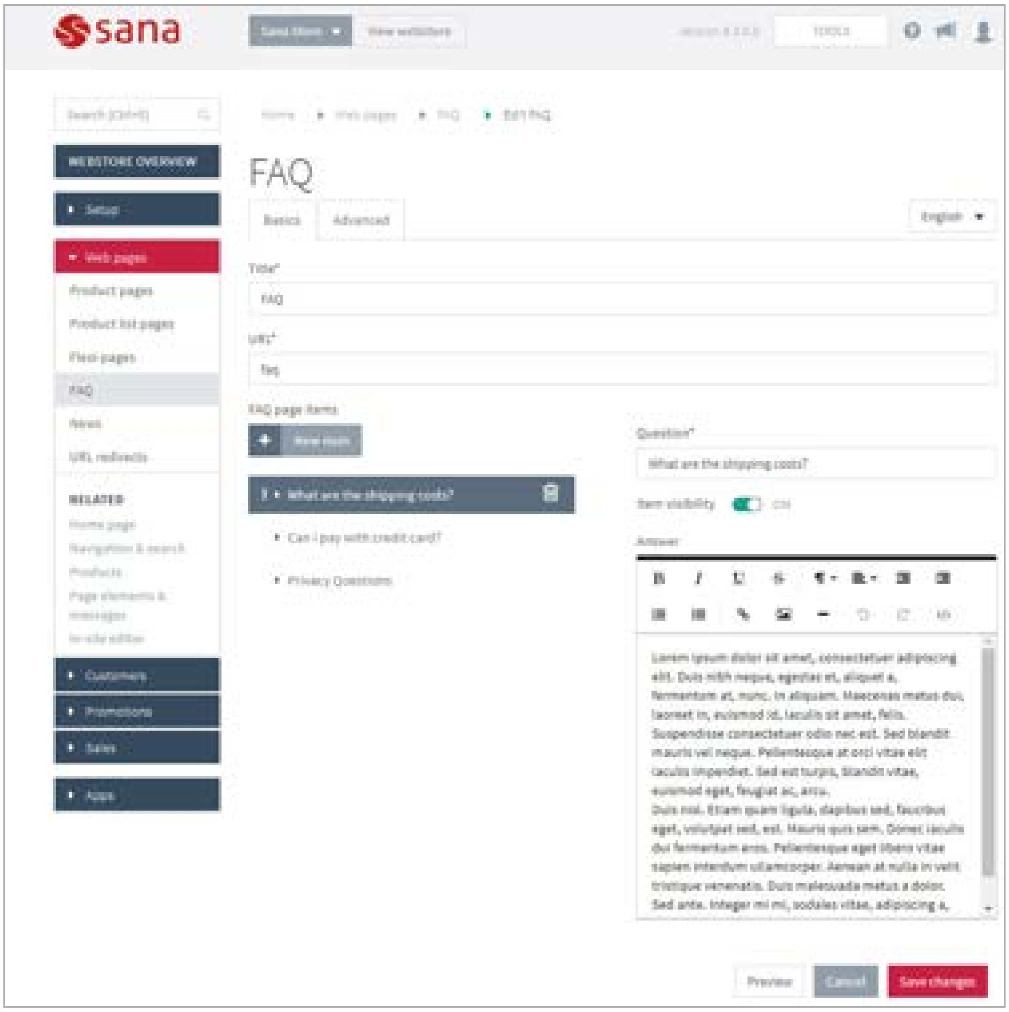
Here you can create new FAQ page, edit or delete, translate into any available language, copy to another webstore, view it in the webstore and set as a home page.

When a page is filled in with content you can preview it to see how it will look in the webstore before saving it.

You can also search for an FAQ page by title and URL. You can also sort the FAQ pages by title and URL.

The tables below provide the description of the FAQ page fields.

Basics



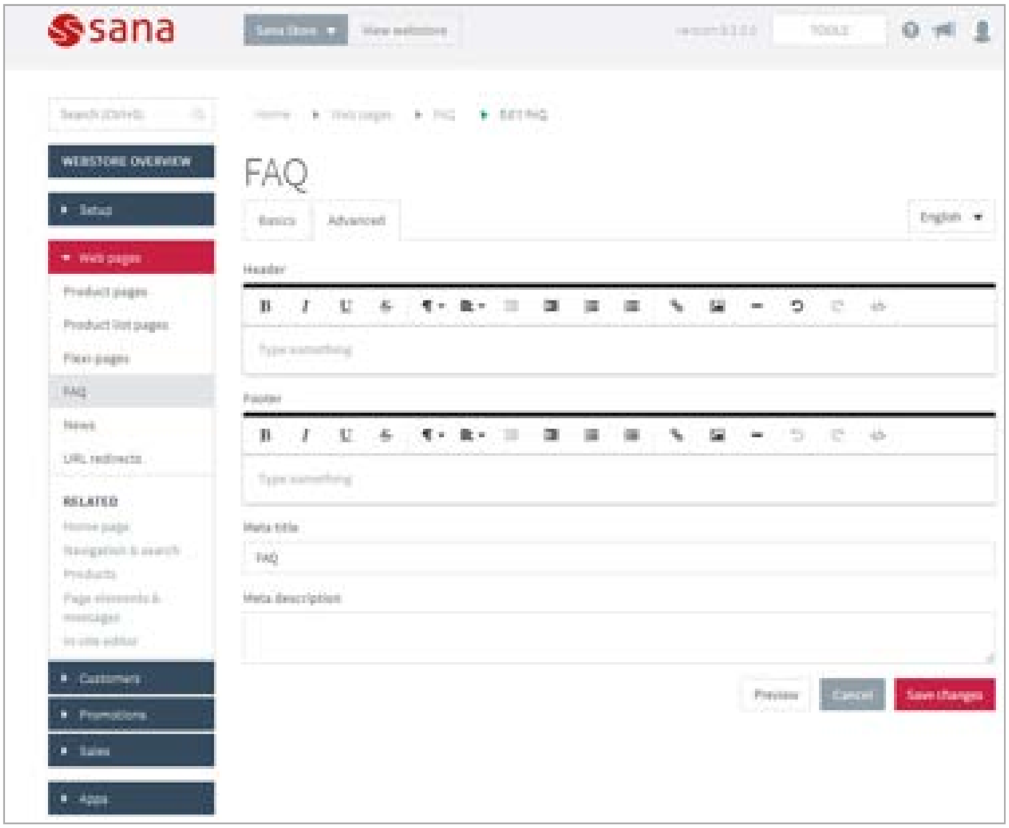
Field	Description
Title	Enter the FAQ page title.
URL	Enter the FAQ page URL. You should specify the part of the FAQ page URL which will be used after your webstore address. **Examples**: • faq • questions/answers **URL** is the required field only for the FAQ pages in the default language (English). For the FAQ pages in other existing languages the **URL** field is optional. If you do not specify it, the URL of the default language (English) will be used.

Use **FAQ page items** under the **Basics** tab to create the list of question and related answers.

Field	Description
Question	Enter your question.
Item visibility	Set visibility of the FAQ page item. Enable **Item visibility** to make the FAQ page item visible in the webstore or disable to hide it.
Answer	Enter the answer to the question. The **Answer** field provides HTML editor that allows adding text and formatting it, adding links and images and embedding videos.

The overall structure of the FAQ page items is presented as a list or tree. You can change the order in which you want FAQ page items to be shown by dragging and dropping them into the order you want. You can also change the levels of FAQ page items, either make it as a parent item or as a child to the one of the first level item. The number of child items that can be created is not limited. Do not create a very deep structure of the FAQ page items to be nicely presented on a page (not more than three (four)-level structure).

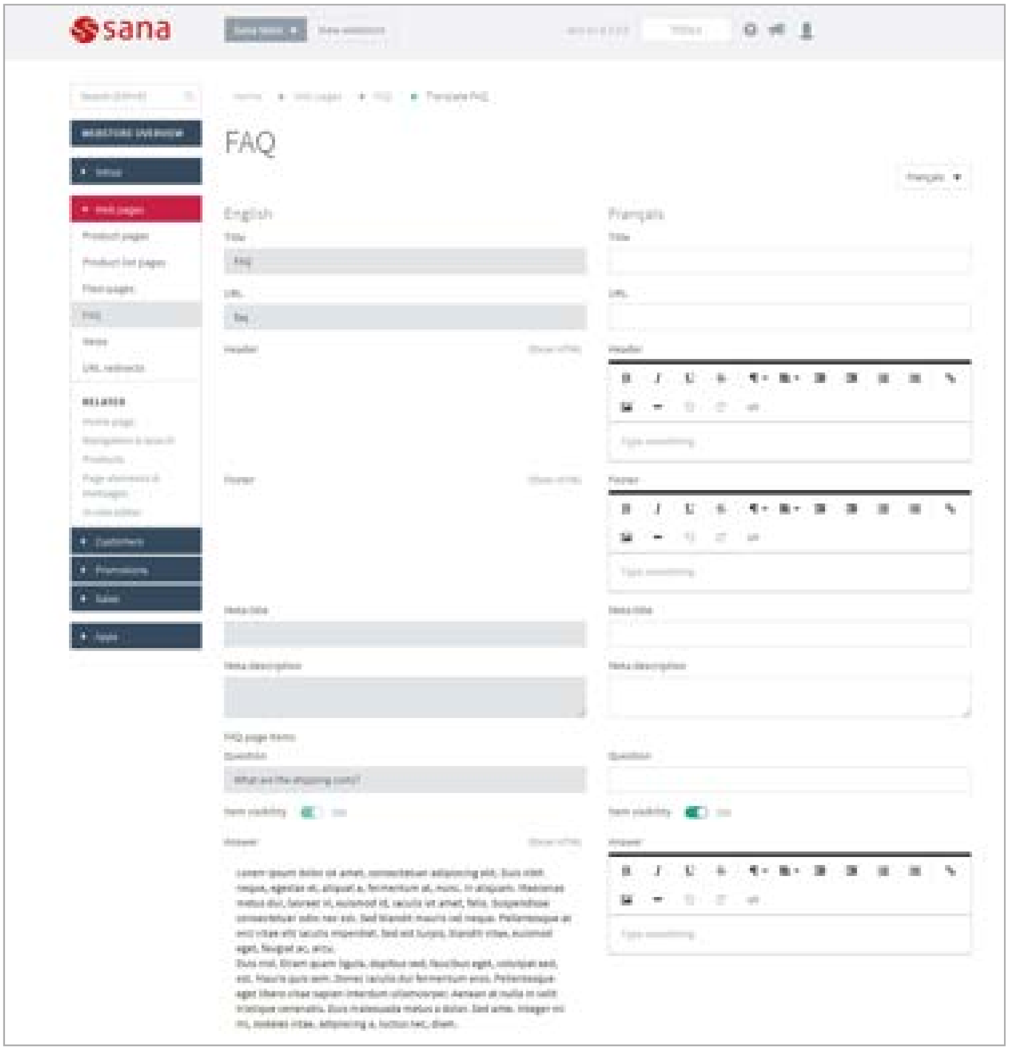
Advanced



Field	Description
Header	Add content to the header and footer of the FAQ page. The **Header** and **Footer** fields provide HTML editor that allows adding text and formatting it, adding links and images and embedding videos.
Footer	
Meta title	Add meta title and meta description to the FAQ page. Meta title is shown in the Web browser on a tab of the opened page. If the **Meta title** field is empty, the title of the opened page and the name of the webstore set in the Sana Admin settings will be shown on the tab of the Web browser. If you enter a meta title, you can also use the [SHOPNAME] replacement tag. This tag will be automatically replaced with the webstore name set in the Sana Admin settings. Meta description describes your page to search engines. It should provide concise explanation of the web page contents. Meta description is used on search engine result pages to display short description for a given page. Meta title and meta description are important factors for a successful search engine optimization of your webstore.
Meta description	

When the FAQ page is created it can be added to the webstore navigation. In the webstore the FAQ page is presented with a list of questions. Each question can be expanded to see an answer.

Translate an FAQ page



Under the **FAQ** menu item you can select a language and translate any FAQ page to the selected language, if your webstore is multi-lingual. Two columns **Title** will be shown, when the language is selected. The first column stores the FAQ page items in the default language (English), the second column holds the translated FAQ page items into the selected language. If in the second column you see a greyed out link **Translate**, this means that there is no translation for the related FAQ page. You can click **Translate** to translate the content of the related FAQ page.

You can also translate any existing FAQ page from its content management page. Locate the FAQ page that you want to translate and click **Edit**. On the FAQ page select a language into which you want to translate the content of the FAQ page.

When you translate the FAQ page it is presented in two columns. The first column holds the FAQ page content in the default language (English), while in the second column you can provide translation to the FAQ page title, URL, header and footer, meta title and meta description. Each question and answer can be also translated as well as you can set visibility of each question of the translated FAQ page.

Web Pages

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News

Watch the video

Sana Commerce webstore comes with different product and content page templates. Webstore administrators are allowed to create news to be published in the webstore.

In case of the 'open' webstore type, webstore visitors who do not have an account can also read news. If a webstore is 'closed', first a customer must log in to be able to read news.

Create a news item

News items can be created and managed in **Sana Admin** > **Web pages** > **News**.

Here you can create news items, edit or delete, translate into any available language, copy to another webstore in case of a multi-store solution, view a news item in a webstore and set a news item as a home page.

When a page is filled in with content you can preview it to see how it will look in the webstore before saving it.

In Sana Admin you can search for a news item by title, URL or news item date. You can also sort the news items by title, URL and news item date.

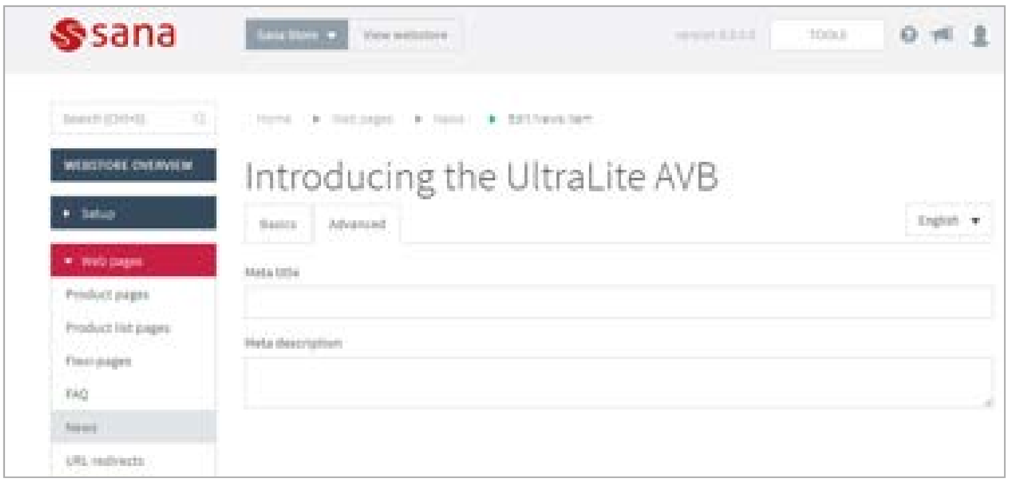
The tables below provide the description of the news item fields.

Basics

Field	Description
Title	Enter the news item title.
URL	Enter the news item URL. You should specify the part of the news item URL which will be used after your webstore address. **Examples**: • demoitem • demoitem/item

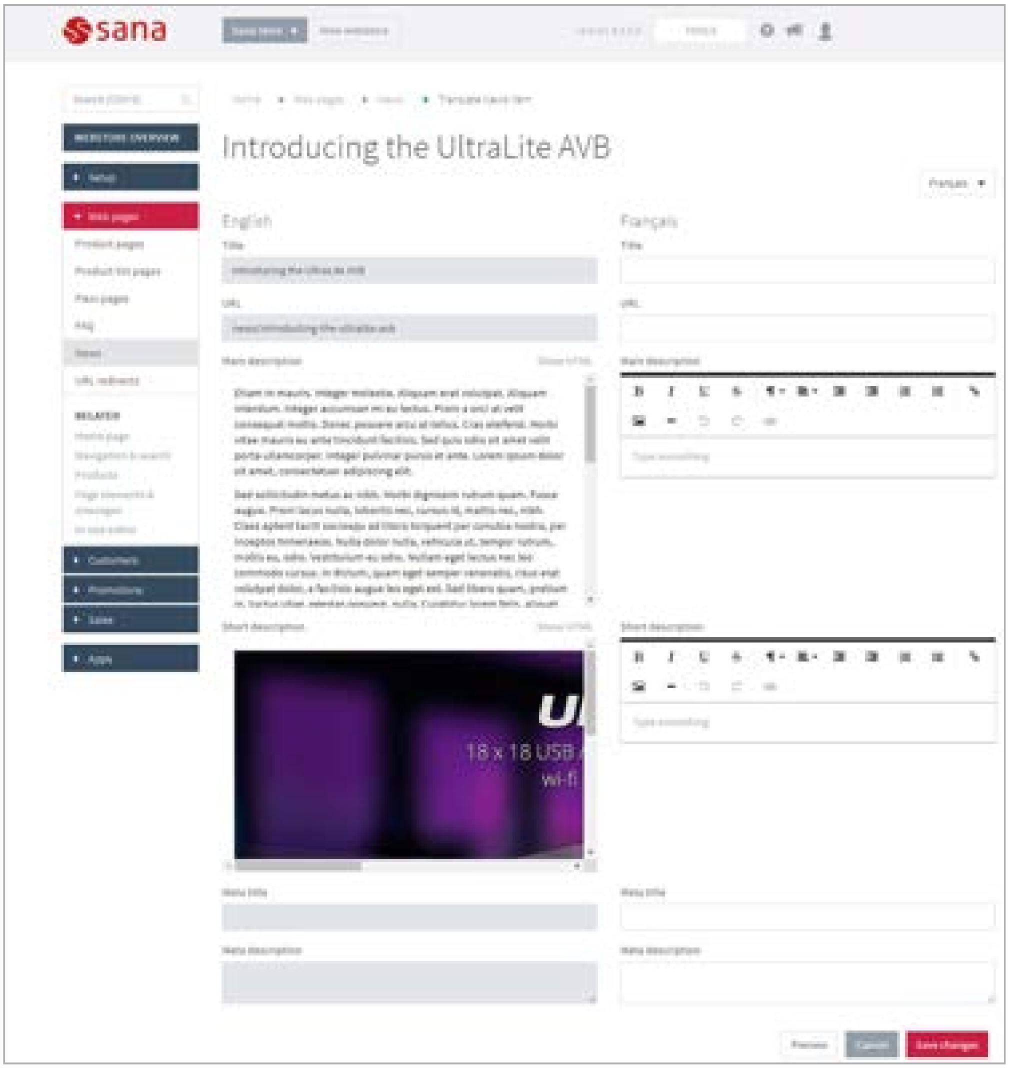
	URL is the required field only for the news items in the default language (English). For the news items in other existing languages the **URL** field is optional. If you do not specify it, the URL of the default language (English) will be used.
News item date	Enter the date when the news item should be published. The date of publishing is also shown in the webstore under the news item title. The news items in the webstore are sorted based on this date.
Main description	Add the actual news message text.
Short description	Provide a short description of the news item. It is placed near the main description.

Advanced



Field	Description
Meta title	Add meta title and meta description to the news item. Meta title is shown in the Web browser on a tab of the opened page. If the **Meta title** field is empty, the title of the opened page and the name of the webstore set in the Sana Admin settings will be shown on the tab of the Web browser. If you enter a meta title, you can also use the [SHOPNAME] replacement tag. This tag will be automatically replaced with the webstore name set in the Sana Admin settings. Meta description describes your page to search engines. It should provide concise explanation of the web page contents. Meta description is used on search engine result pages to display short description for a given page. Meta title and meta description are important factors for a successful search engine optimization of your webstore.
Meta description	

Translate a news item



Under the **News** menu item you can select a language and translate any news item to the selected language, if your webstore is multi-lingual. Two columns **Title** will be shown, when the language is selected. The first column stores the news items in the default language (English), the second column holds the translated news items into the selected language. If in the second column you see a greyed out link **Translate**, this means that there is no translation for the related news item. You can click **Translate** to translate the content of the related news item.

You can also translate any existing news item from its content management page. Locate the news item that you want to translate and click **Edit**. On the **News item** page select a language into which you want to translate the content of the news item.

When you translate a news item it is presented in two columns. The first column holds the news item content in the default language (English), while in the second column you can provide translation to the news item title, URL, main and short descriptions, meta title and meta description.

In the webstore, when a customer navigates to the news, on the left the headlines of 5 latest by date news items are shown:

A webstore visitor can see an overview of the news items. On the news items overview page a news item title, date and short description are shown. The news items are sorted by news item date. Clicking on the news item title (link) opens the entire news article.

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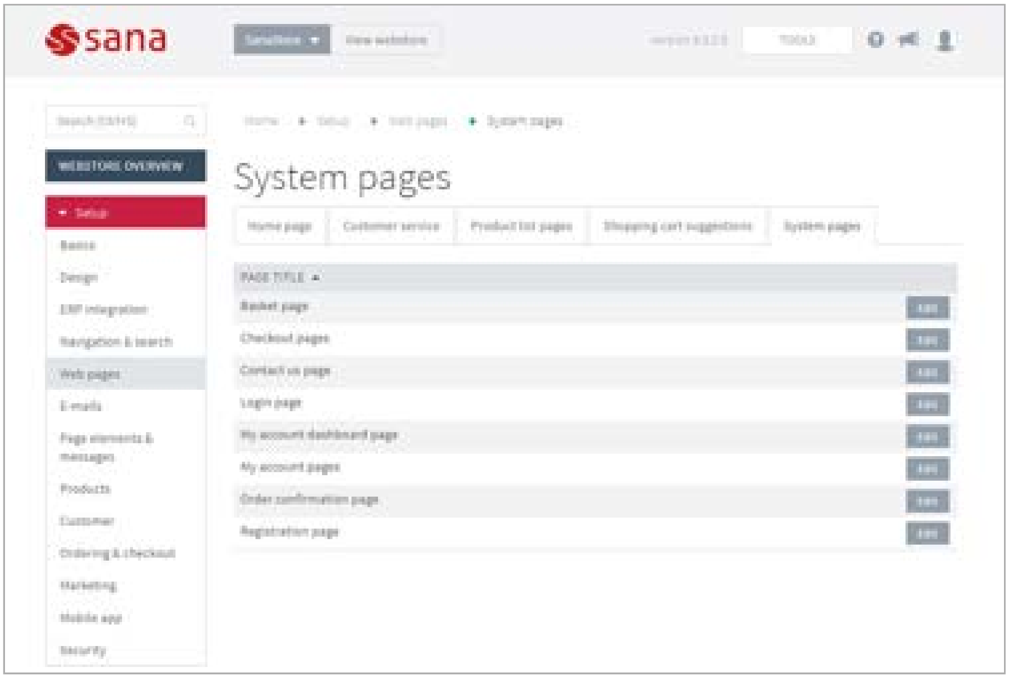
System Pages

You can manage the content not only of different web pages, such as flexi-pages, product list and product pages, but you can also add different content elements to the system pages of a Sana web store. System pages are the standard pages that exist in Sana by default.



You can add different content elements to the header and footer of the following system pages:

- Basket
- Checkout
- Contact us
- Login
- My account dashboard page
- My account pages (These are sales document pages. You cannot add content elements to a specific sales document page. Once these elements are added to the header and footer of the **My account pages**, they will be shown on all sales document list pages (orders, quotes, invoices, return orders, return receipts, credit notes, shipments, sales agreements and order templates).
- Order confirmation
- Registration

NOTE

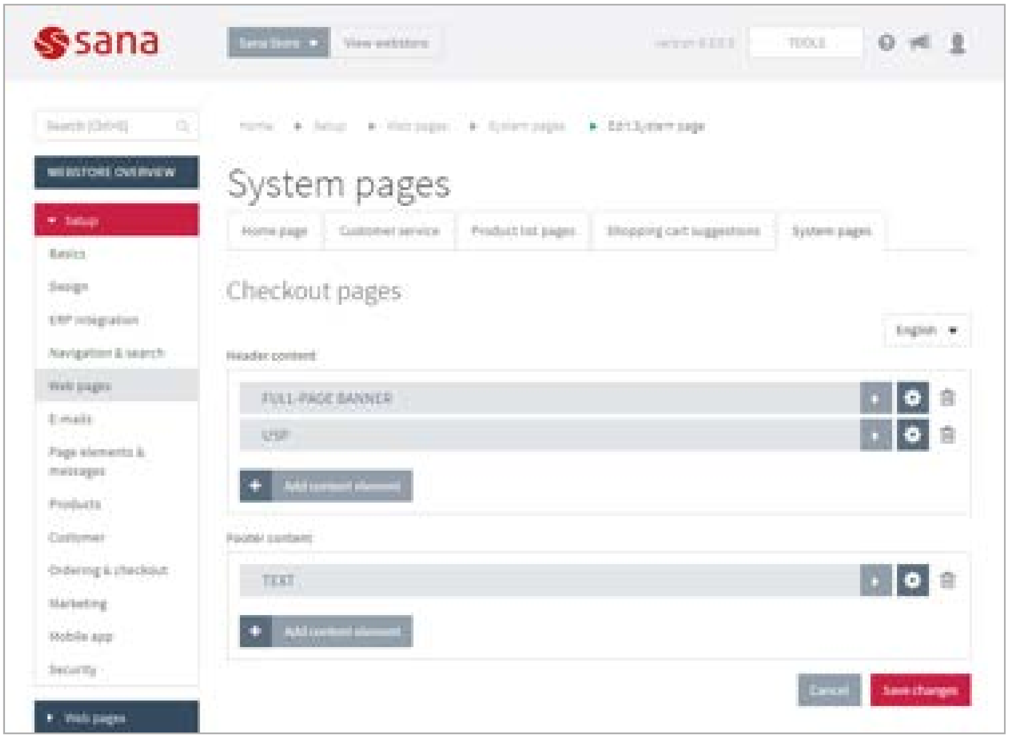
Content elements are shown on the "Sales Agreements" page starting from **Sana 9.3.2**. Also, in **Sana 9.3.2** "Sales documents pages" were renamed to "My account pages" and "My account page" was renamed to "My account dashboard page".

NOTE

You can add content elements to the "Contact us" page starting from **Sana 9.3.1**.

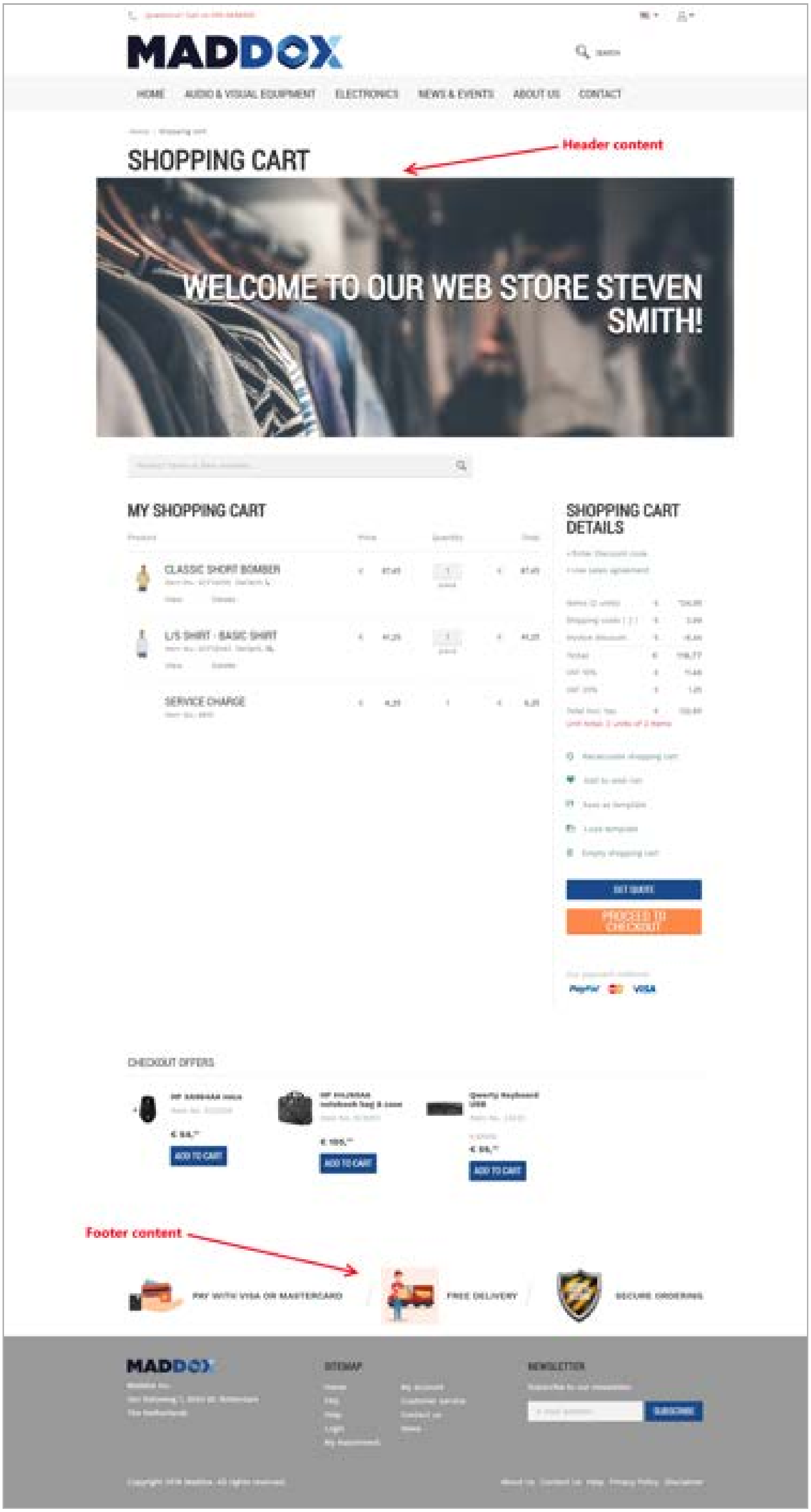
Using content elements, you can enrich system pages of your Sana web store with the original, creative and useful content.

In Sana Admin click: **Setup** > **Web pages** > **System pages**. Click **Edit** on the system page you want to add a content element to. Add the necessary content to the system page.



You should not overload system pages with content, but you can add some useful information there, for example related to security, payment and delivery services you are using.

See an example of basket system page with content elements added to the header and footer in the Sana web store.


MADDOX
HOME
AUDIO & VISUAL EQUIPMENT
ELECTRONICS
NEWS & EVENTS
ABOUT US
CONTACT
SHOPPING CART
Header content
WELCOME TO OUR WEB STORE STEVEN SMITH!
MY SHOPPING CART
SHOPPING CART DETAILS
CLASSIC SHORT BOMBER
L/S SHIRT - BASIC SHIRT
SERVICE CHARGE
GET QUOTE
PROCEED TO CHECKOUT
CHECKOUT OFFERS
ADD TO CART
ADD TO CART
ADD TO CART
Footer content
PAY WITH VISA OR MASTERCARD
FREE DELIVERY
SECURE ORDERING
MADDOX
SITEMAP
NEWSLETTER
SUBSCRIBE

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URL Redirects

Watch the video

NOTE

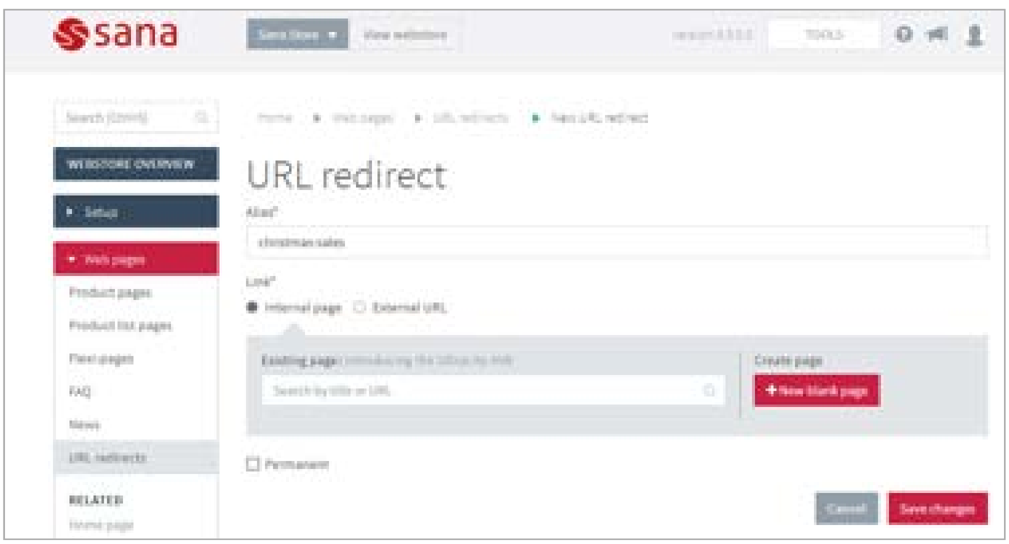
There is a Sana add-on which can be used to import URL redirects from a CSV file. The add-on can be downloaded from the Sana Community web site and installed inside Sana. Only the registered Sana partners can access Sana Community. If you are a customer and you want to install the add-on, please contact your Sana partner or Sana project manager. For more information, see "Import URL Redirects".

In Sana Admin click: **Web pages** > **URL redirects**.

URL redirects are used to create the alias-based short URLs, for example: http://www.mywebshop.com/christmas_sales.

It allows you to use alias-based short URLs in promotions for the webshop.

An alias is easier to remember than a full path. It can contain strong words which will improve the ranking in search engines.



To create URL redirect:

Step 1: On the **URL redirects** page click **New item**.

Step 2: Identify an appropriate alias. Use the most common word or a phrase for a page to which a redirect will be created.

NOTE

The **Alias** field should NOT contain any of these special characters:

{} [] | \ ^ <> *

'?' is allowed only if the URL contains some parameters, for example /shop/Product.aspx?code=0102023&category=notebooks

Step 3: Set the internal page or external URL:

- **Internal page** - to create a redirect to the page within a webstore. These pages are language-independent. Select a page to which a redirect should be created.
  You can also create a blank page that will be automatically selected as the internal page and fill it with content later on.
- **External URL** - to create a redirect to the external website. A redirect to the language-specific page within a webstore can be created also. A link of the external website or language-specific page within a webstore must be copied to the **External URL** field. If you enter external URL it should be specified with the protocol at the beginning of the URL, for example: http://sana-commerce.com/.

NOTE

When you are redirected to the language-independent page, it will be opened in the language which has been used during the last webstore visit.

If you are redirected to the page and have not entered the webstore before, it will be opened using the default language of the webstore.

Step 4: Select a status code to specify how a Web browser issues a new request at a different location. You can either select the **Permanent** checkbox to send the "Permanent (301)" status code to the client or do not select and use the default option which sends the "Found (302)" status code.

Status code	Description
Found (302)	Used to tell the Web client to issue a new request to the location. This is the default option.
Permanent (301)	Used to tell the Web client that the location for the requested resource has permanently changed.

On the **URL redirects** page you can search for a specific URL redirect by alias and sort all URL redirects by alias and permanent status.

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Web Pages

Content Elements

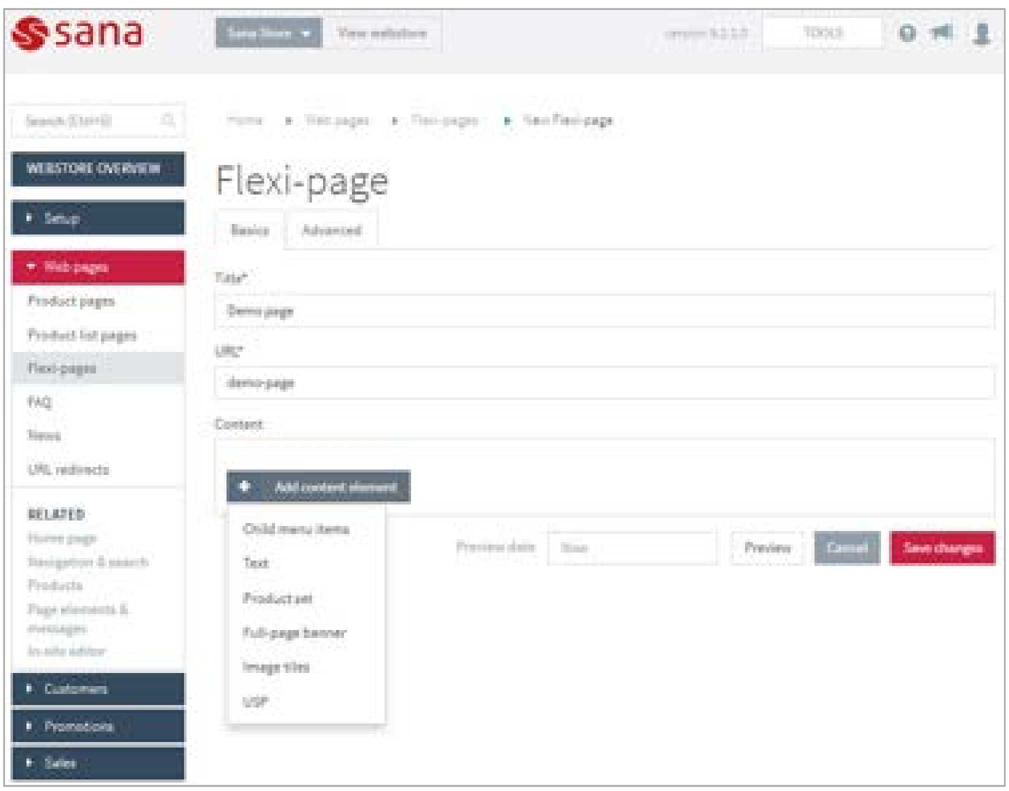
Watch the video

Content elements can be added to flexi-pages, system pages, product and product list pages in Sana Admin.

Great content is the key to success. Use content elements to enrich your web store with original, creative and useful content.

Sana comes with a few content elements out-of-the-box:

- Text
- Image tiles
- Child menu items
- Product set
- Full-page banner
- Unique selling proposition (USP)



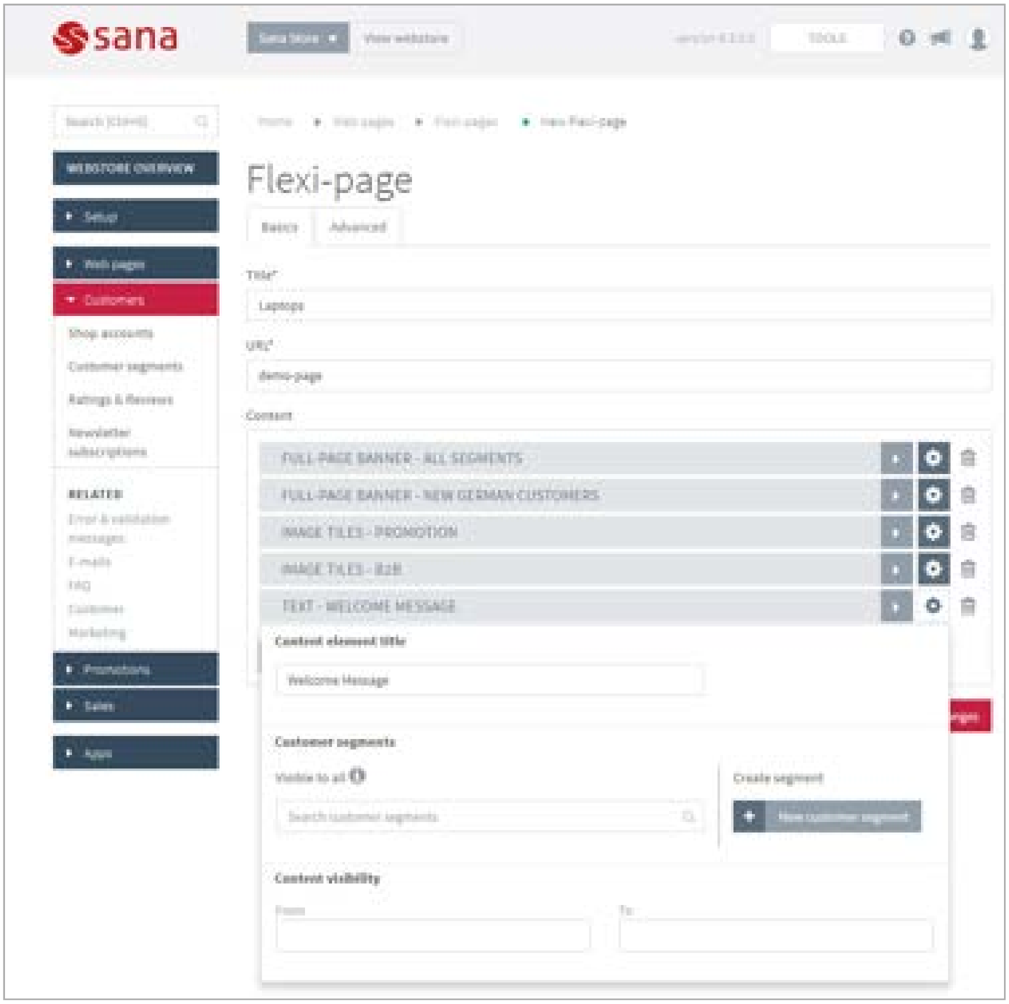
There are also content elements which are available as add-ons that can be installed into Sana.

For more information, see "Content Elements".

The number of content elements that can be added to the page is not limited. You can also change the order of the content elements by dragging and dropping them. The content elements are shown on a page in the order they are arranged.

Content Element Title

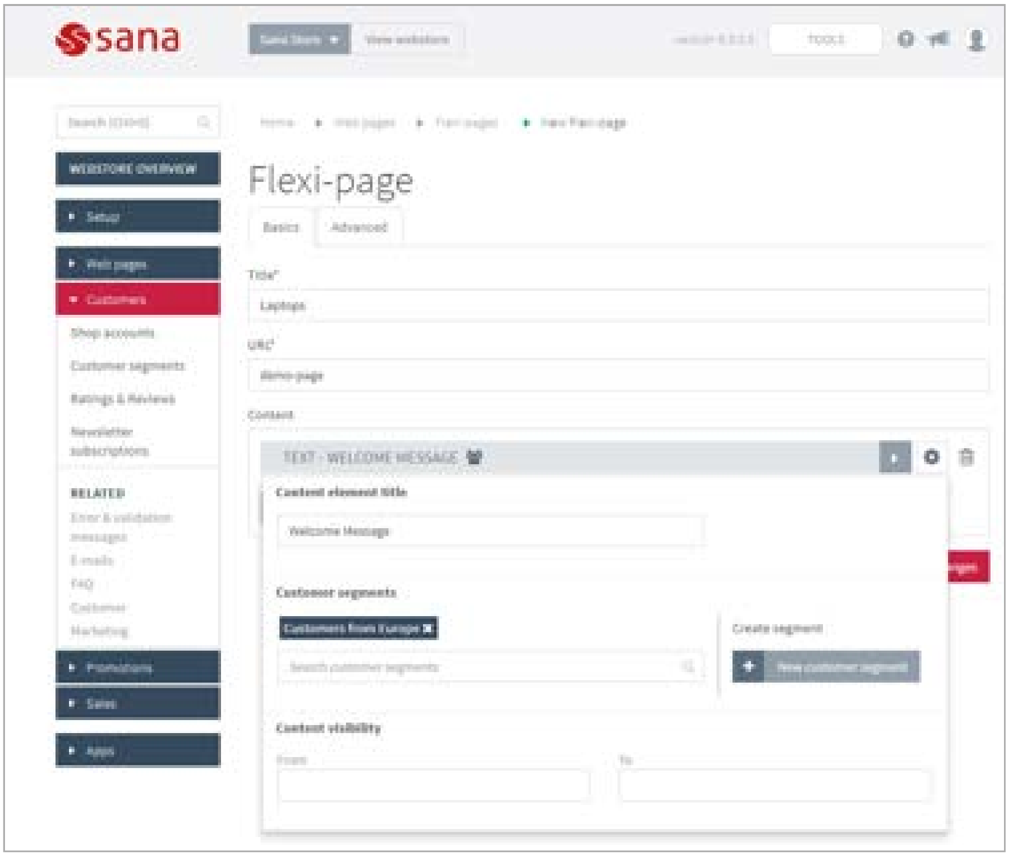
Using the **Content element title** field you can give names to content elements for their better presentation in Sana Admin. You can use this to have a better overview of content elements on a page and find the one you need faster.



Customer Segments

You can also set up customer segments for any content element. It allows to show different content elements on the page to specific customer groups. When you set up customer segments for the content elements on the page, you can show a certain content only to the customers which are in the customer segment. All other customers will not see this content element. This way you can fill your web store with the customer-specific content.

If you assign a customer segment to a content element, then you will see the icon  on the expandable item block. This way a user can see an overview of all content elements on a page to which customer segments are assigned and don't need to check the settings of each content element.



For more information, see "Customer Segments".

Content Visibility

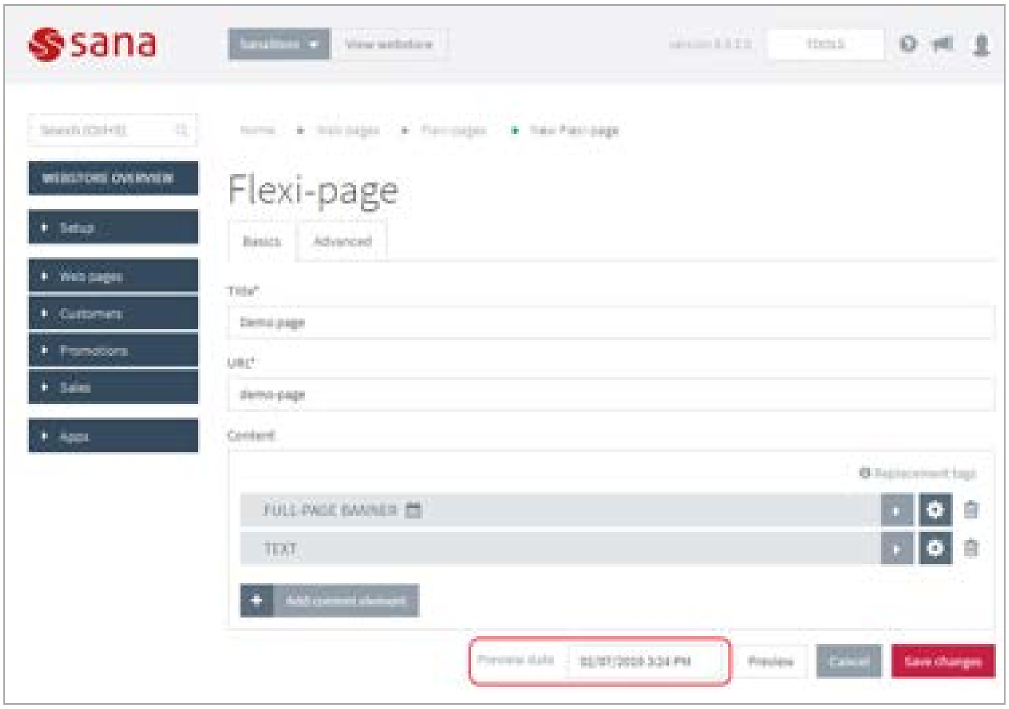
You can also set up the dates when the content element should be available in the web store. Enter the **From** date (the start date when the content is visible) and the **To** date (the end date when the content is visible), if you want this content element to be available in the web store for some period of time. Both of these fields are optional, so you can specify either a **From** date or a **To** date.

This can be useful for marketing campaigns. For example, you can create some content related to Christmas Sales or Black Friday beforehand and specify the dates when this content must be shown in the web store.

If you set up the dates for a content element, then you will see the icon  on the expandable item block. This way a user can see an overview of all content elements on a page that have visibility dates and he or she doesn't need to check the settings of each content element.

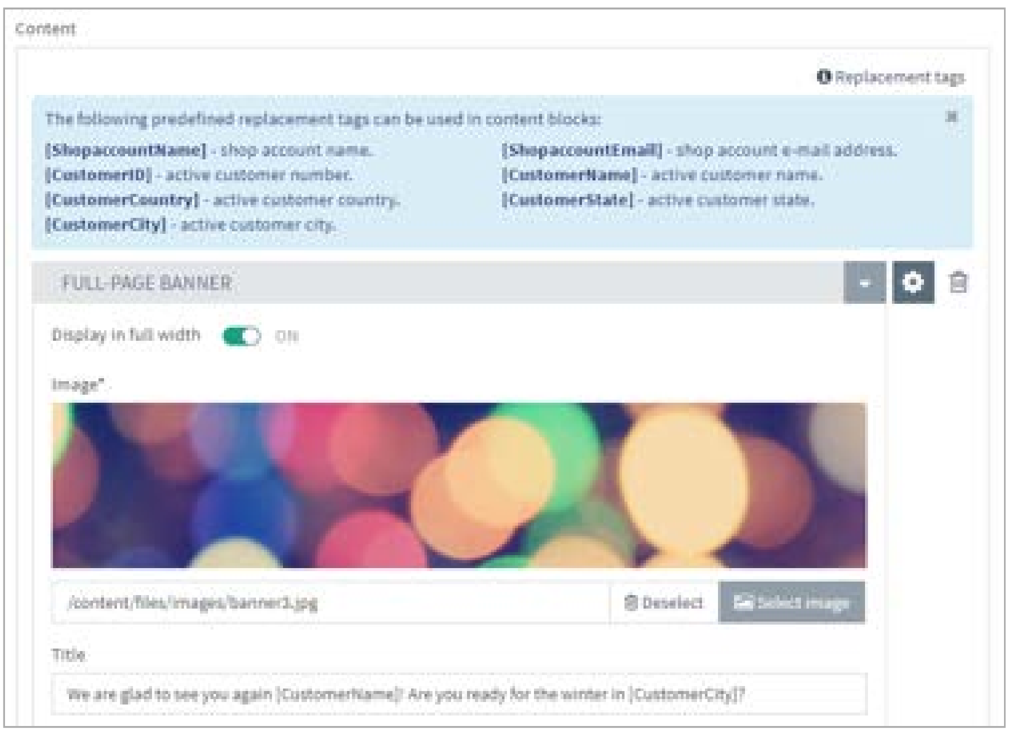
Using the **Preview date** field, you can preview a page now or you can see how this page will look in the web store at a specific date in the future.

For example, you want some content element to be shown in the web store at a specific date, but you do not know how good it will look on the page together with other content elements, thus you can set the preview date and preview this page to check it.

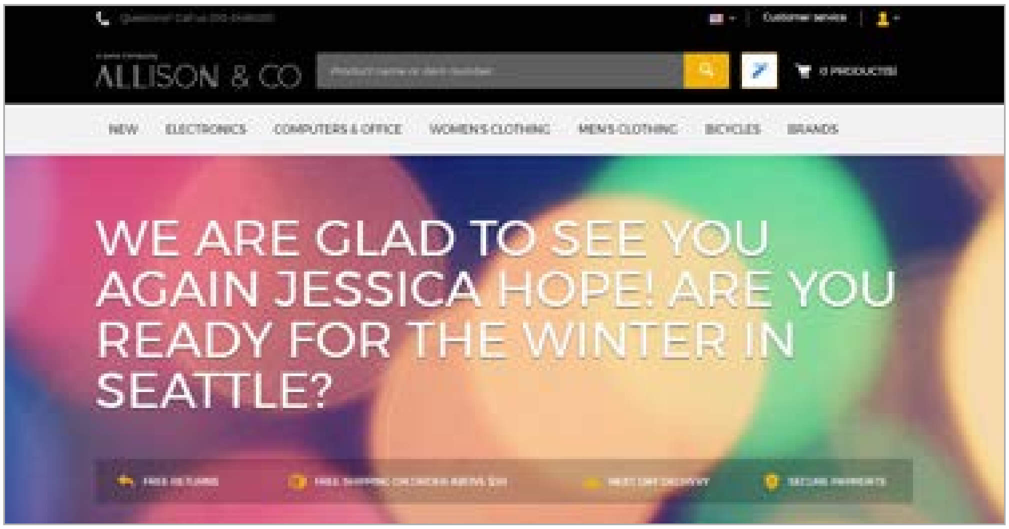


Replacement Tags

Sana offers a lot of great features that allow content managers to create personalized content. Using **Replacement tags**, you can impress your customers even more with content addressed to each customer individually.



You can use replacement tags in the content elements, such as customer name, e-mail or address to contact your customers directly through your web store content. These tags will be replaced with your customer's personal information retrieved from the ERP system. Replacement tags can be used in the text (HTML) editor and in different text fields such as Title, Sub title, Button text etc.



In this way, you can build and deepen relationships with each individual customer.

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Custom Forms

By adding new forms to your Sana webstore, you can make it easy for your customers to provide you with the necessary information or feedback. There are different services, such as Typeform and Google Forms, that allow to create all kind of forms from scratch or using existing templates and embed them on your website. The data specified by a customer in the form is stored by the form builder service that you use but not by Sana.

Some examples of common forms used on a website: contact forms, feedback forms, surveys, etc.

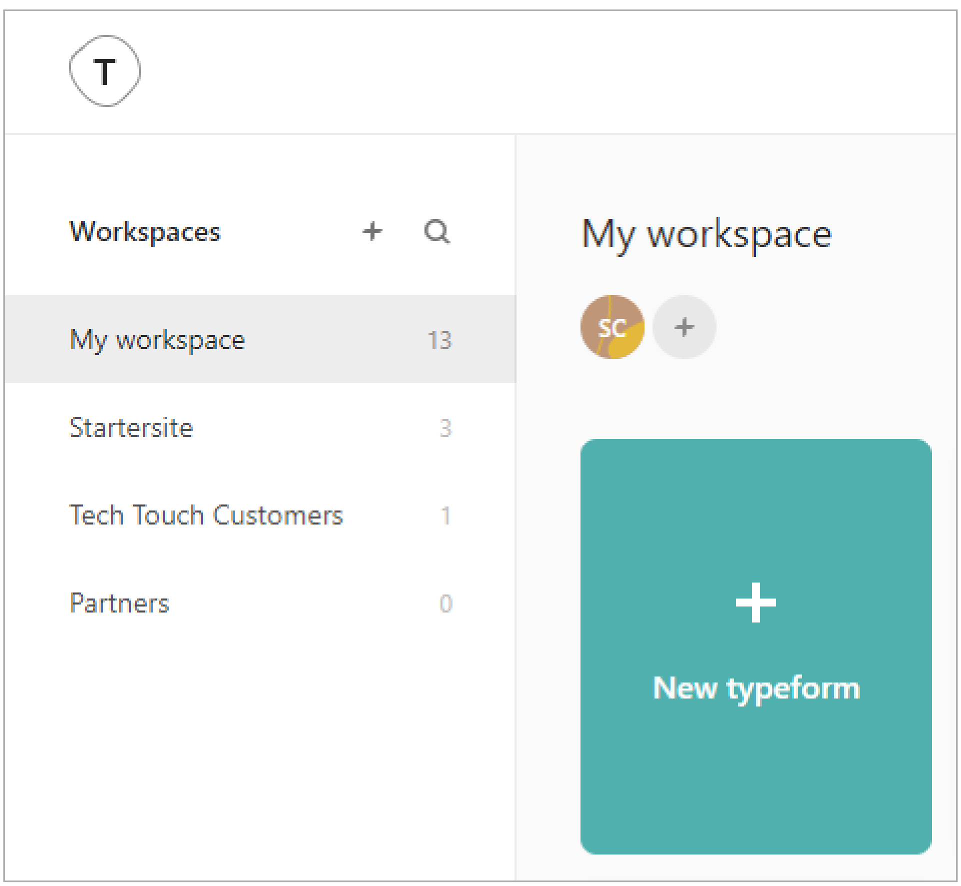
You can embed the form on any page of the Sana webstore using the "Code" content element. This content element is delivered as an add-on which can be installed from Sana Apps in Sana Admin.

As an example, let's create a form in **Typeform** and embed it in Sana. You will need a Typeform account.

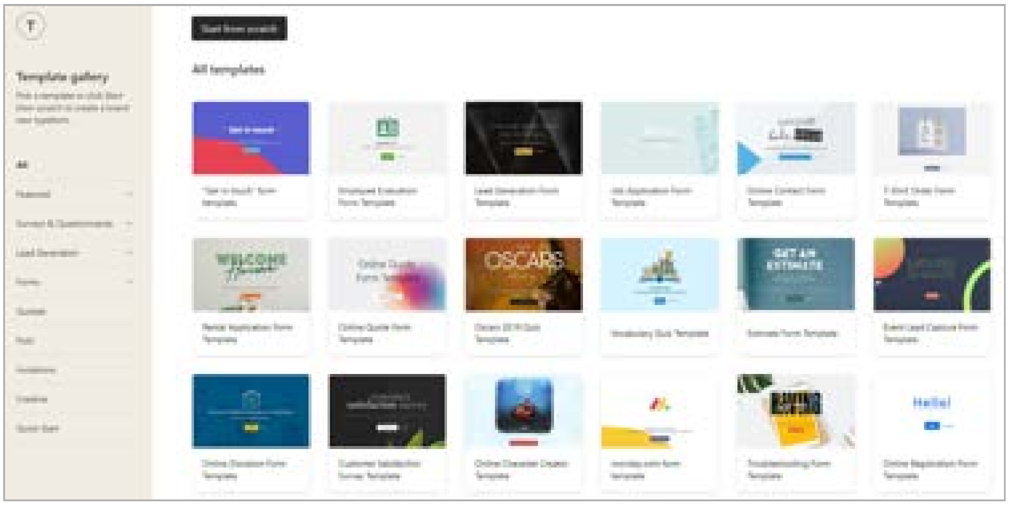
Create a form in Typeform

Step 1: Sign up to Typeform to create an account (or log in with your own account).

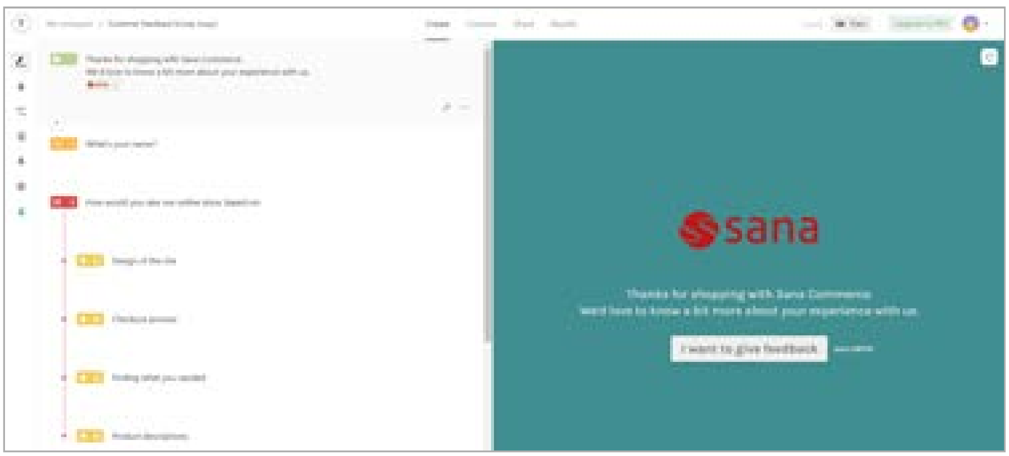
Step 2: Create a new form in Typeform by clicking the "New typeform" button.



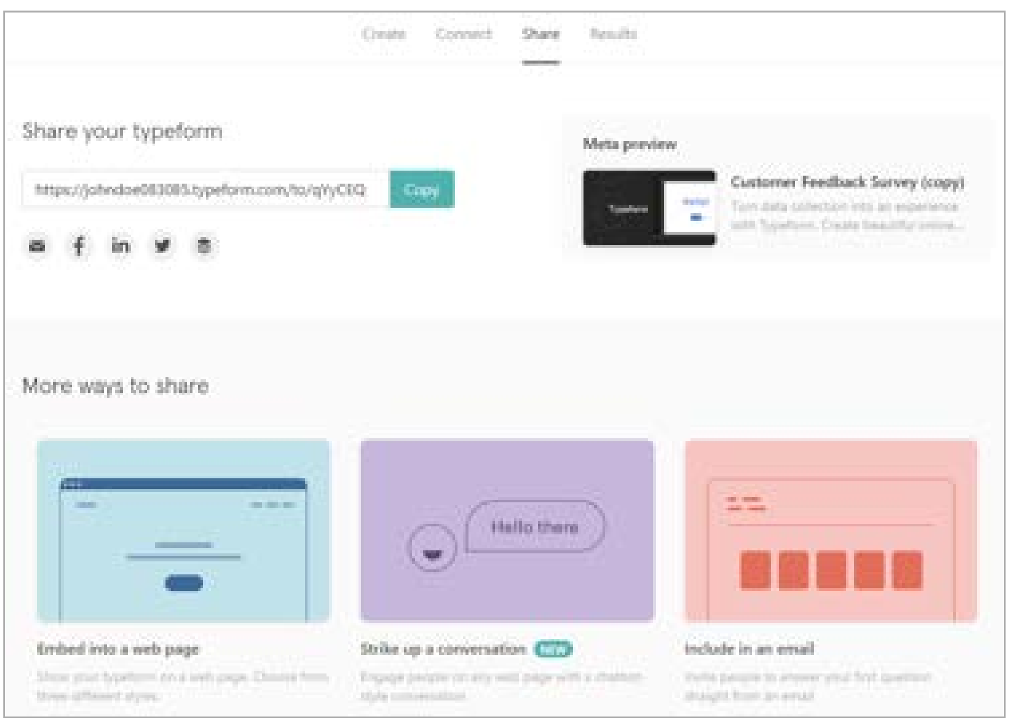
You can start from scratch or use one of the Typeform templates. This will save you time to create the form.



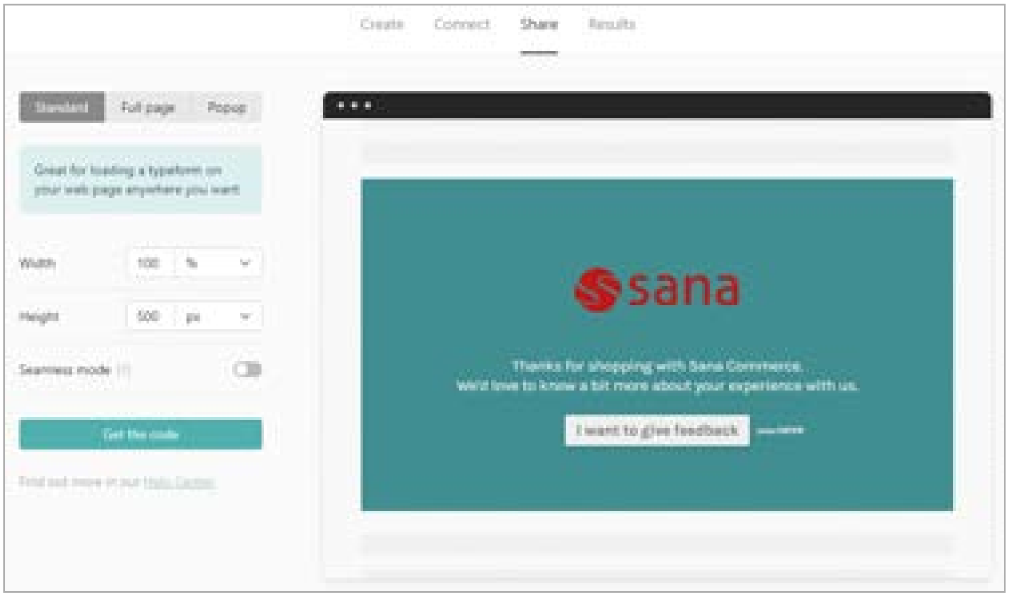
Step 3: Add your fields or change the existing fields in the template as necessary. You can also customize the design of the form the way you need.



Step 4: Click "Share" in the top menu when you are 100% happy with your form. Then, click "Embed into a web page".



Step 5: You can leave the default settings or change them the way you need. You can change the size of the form and open it directly on the page or in a popup.



Step 6: Click on "Get the code". You will need to paste this code to a page in Sana Admin. Thus, it's better to copy it to some editor, for example Notepad.

Embed a form into a web page

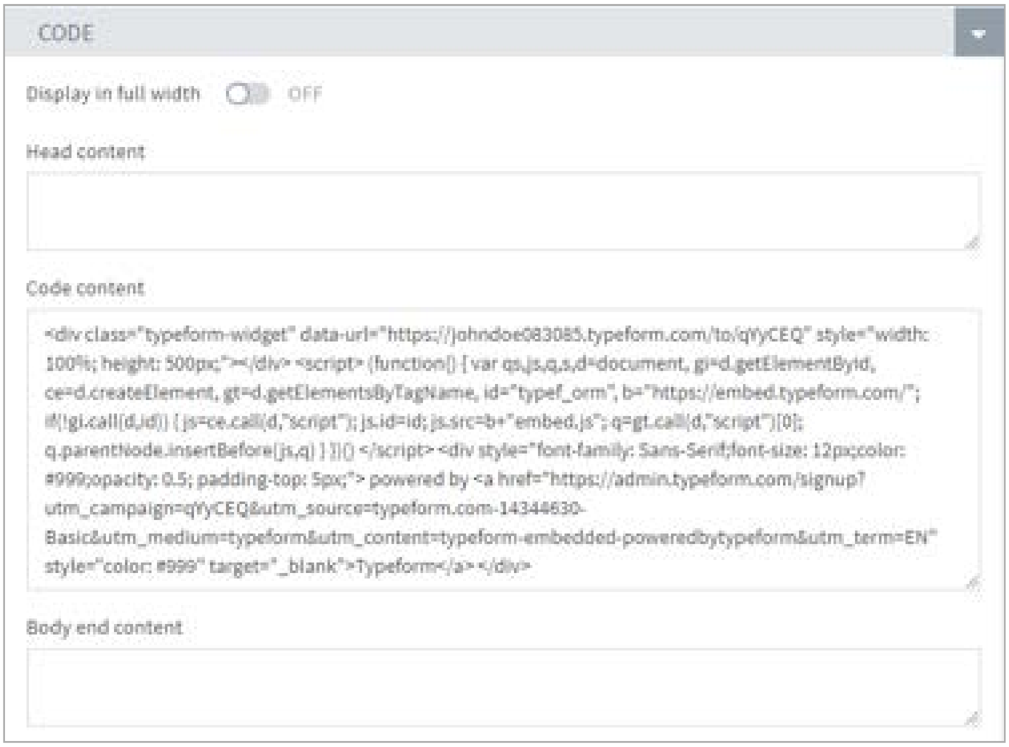
Now it's time to embed the newly created form into a web page in Sana Admin. You can easily embed the form into various web pages: product detail pages, product list pages, flexi-pages or into system pages, for example shopping cart or account dashboard.

In this tutorial, we will embed the form into a flexi-page.

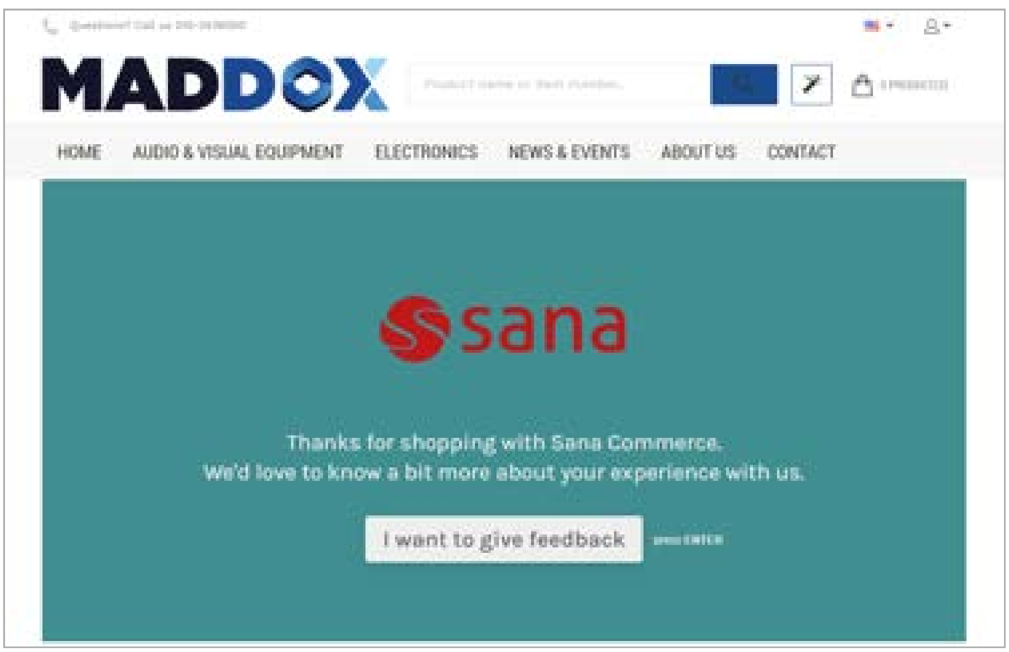
Step 1: Create a flexi-page or edit the existing page. Add the "Code" content element to the flexi-page.

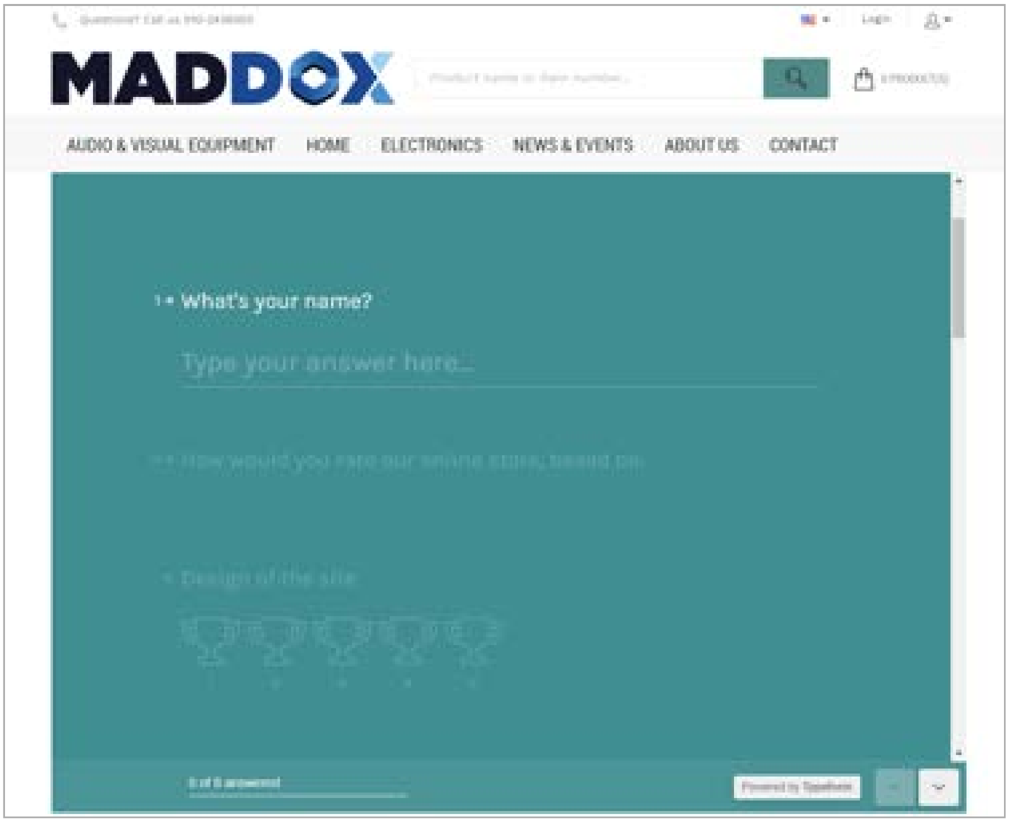
If there is no "Code" content element in the list, in Sana Admin click: **Apps** > **Add-ons**. Find the "Code content block" add-on and install it.

Step 2: Paste the embed code you copied from Typeform in the field "Code content" of the "Code" content element and save the page. You can also preview the page with the form before saving it.

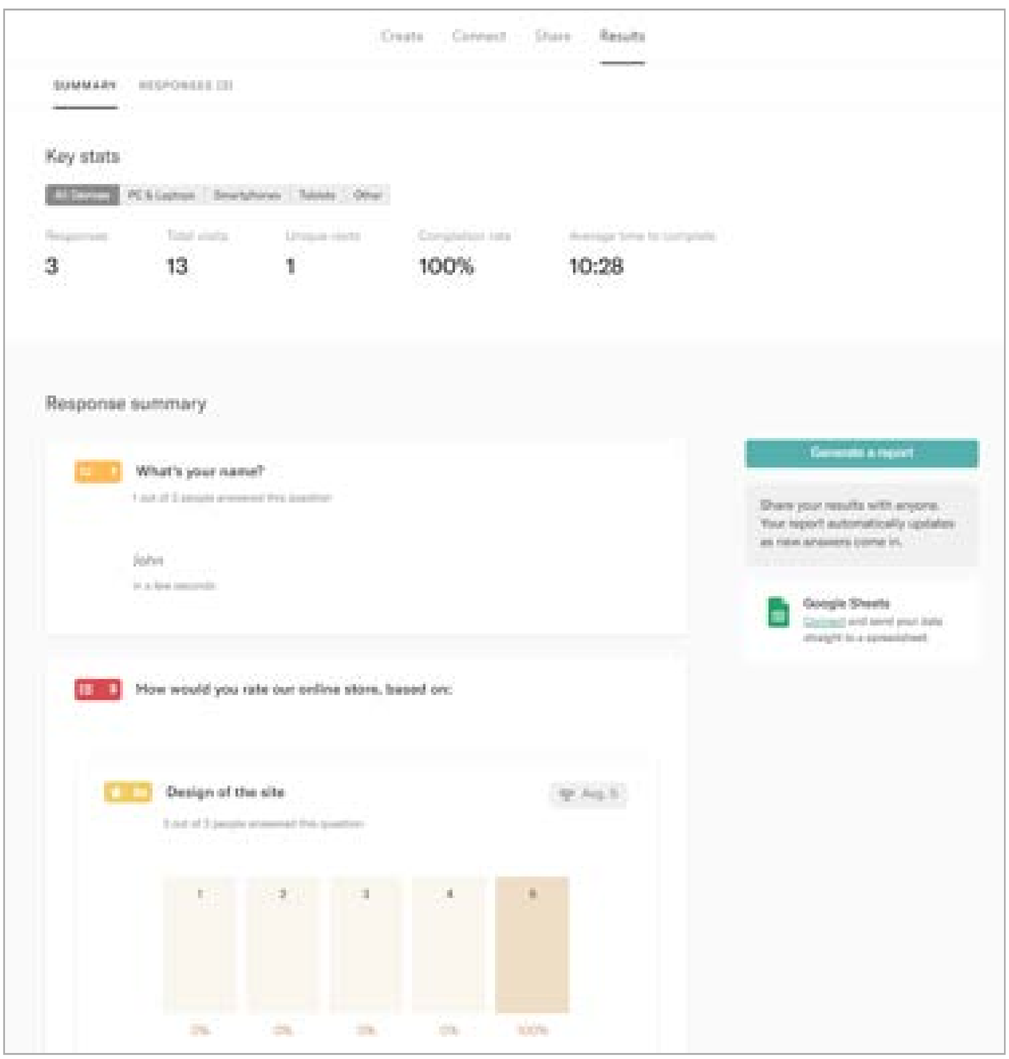


Step 3: Check how the form is shown on the webstore page. You can add the page with the form to your webstore navigation, so that your customers can easily find it.





All your customer responses submitted in the form are stored in Typeform. You can see them on the "Results" page.



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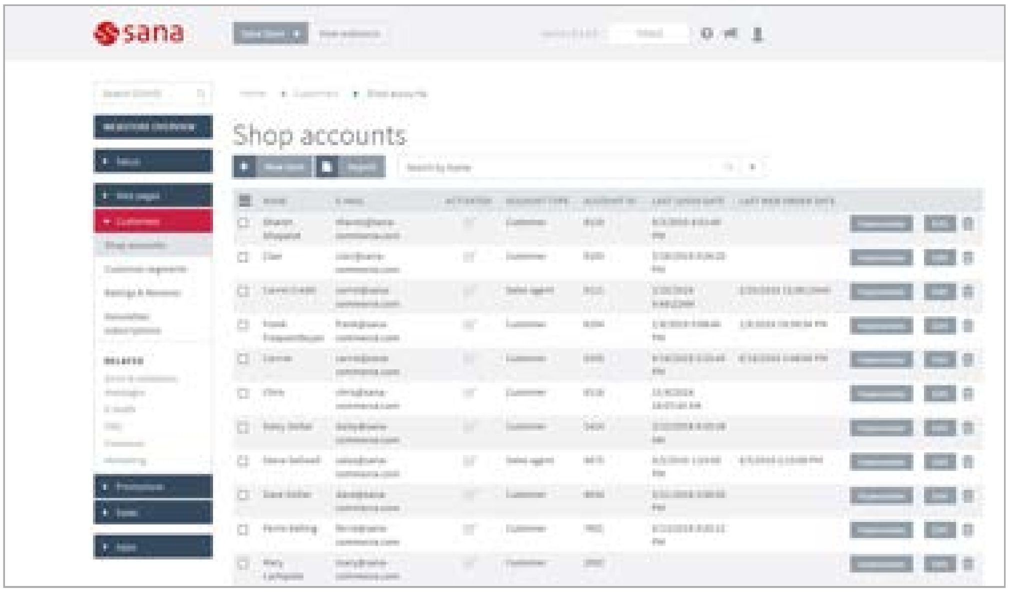
Customers

Next

Shop Accounts

Watch the video

To manage shop accounts, in Sana Admin click: **Customers** > **Shop accounts**.



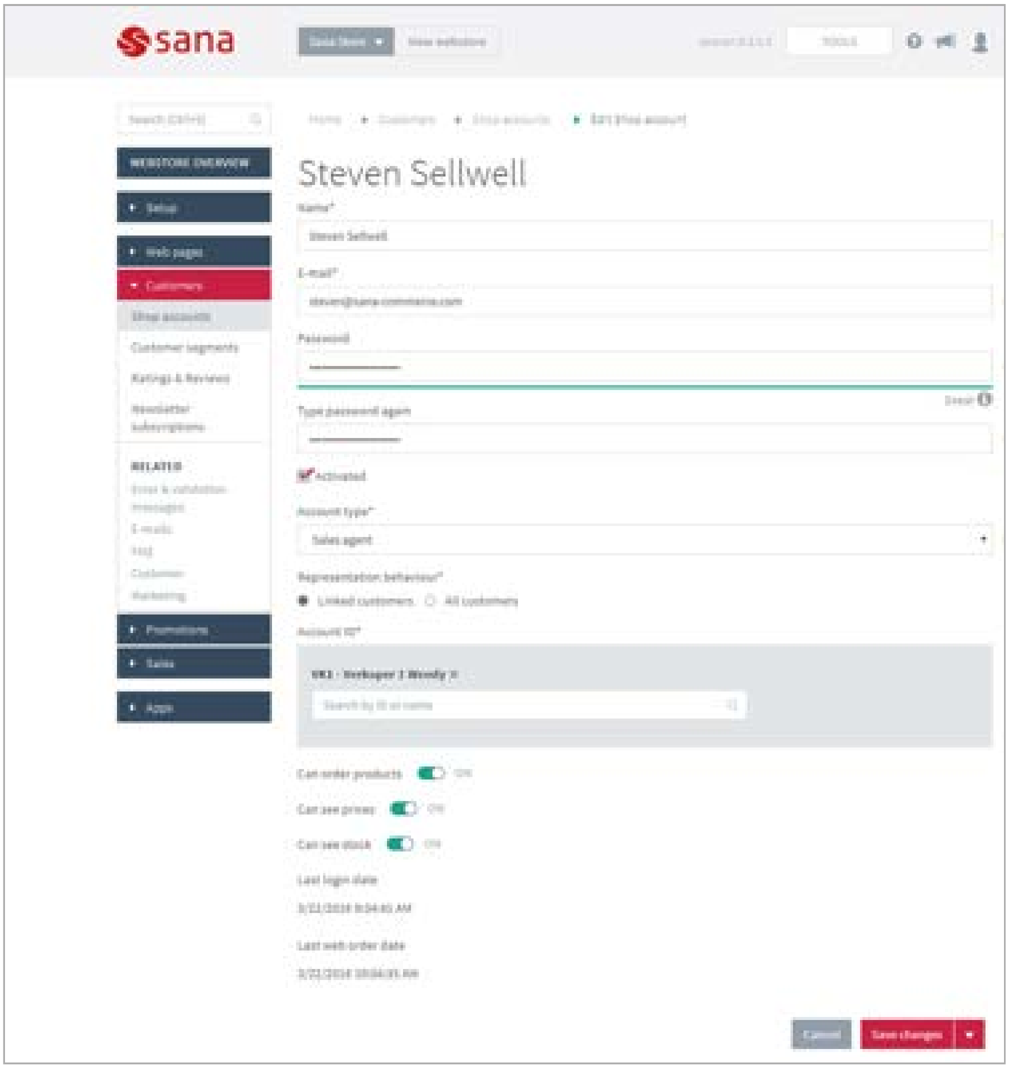
On the **Shop accounts** page you can see an overview of all shop accounts. You can create a shop account, edit and delete already existing shop account and import shop accounts from a CSV file.

You can search for a shop account by name, e-mail address and account ID and filter the shop accounts by the "Activated" status and account type. You can also sort the shop accounts by name, e-mail, account type or ID, by the "Activated" status and last login date. You can also view the last login date of the customer. If a customer selected the "Remember me" checkbox while logging in the webstore, this will be considered as the last login date of a customer. The date will be updated when the customer logs out (either manually or automatically when the authentication cookie expires - 30 days) and logs in the web store again.

Starting from **Sana 9.3.3** on the **Shop accounts** page you can also view the date when the customer placed his or her order for the last time.

Create a shop account

Step 1: Click **New item**.



Step 2: Enter the shop account information. The table below provides the description of the shop account fields:

Shop account details	Description
Name	Enter the name of the customer. This name is shown in the header of the webstore.
E-mail address	Enter the e-mail address of the customer which is used as a login name in the webstore.
Password	Enter the password of a shop account which is used to log in the webstore.
Type password again	Password should be at least 7 characters and not more than 30.
Activated	Activate the shop account.
Account type	Select the shop account type. Available account types: • Customer • Contact • Sales agent

	Starting from **Sana 9.3.3**, if you select the **sales agent** account type, then you can select its representation behaviour. If you enable the option **Linked customers**, your sales agent can represent particular customers that you assign to the sales agent in the ERP system. If you enable the option **All customers**, your sales agent can represent all valid customers that exist in the ERP system. This sales agent can log in to the Sana web store and represent any customer he or she needs and place an order even if this customer is not linked to the sales agent in the ERP system.
Account role	There are three shop account roles: • **Regular account** - is a regular business customer. • **Account manager** - is able to create and manage sub-accounts directly on the web store. Account manager can also place orders just like a regular customer. • **Sub-account** - is able to place orders just like a regular customer. However, if the order exceeds the cost limit set for the sub-account in the web store, the order should be approved. Depending on the rules set for the customer with the sub-account role there might be a single or multiple levels of authorization. For more information about different roles, see "Shop Account Roles".
Account ID	Select the account ID of the customer (contact or sales agent) depending on the selected account type. You can search for the account by ID or name of the customer (contact or sales agent). The list of all available accounts is retrieved from your ERP system. Use the "Customer import" task to retrieve or update the list of all customers (contacts or sales agents) from your ERP system.

Step 3: Set up permissions for a customer. You can define whether a customer should be able to order products, see prices and stock.

NOTE

Shop account permissions depend on whether orderability, price and stock visibility are enabled or disabled globally in Sana Admin under: **Setup** > **Products**. If it is disabled globally, you cannot override it per customer. In this case, you will see a message that the setting has no effect when it is disabled on the webstore level.

Step 4: After you have entered all shop account details and configured it, you must save it. You can simply save the shop account or save it and send the confirmation e-mail to the customer. You can also send the confirmation e-mail when you change the details of the existing shop account.

NOTE

You can send the confirmation e-mail to a customer starting from **Sana 9.3.2**.

Click **Save changes** to save the shop account or click the split button and then click **Save changes & send confirmation email** to save the shop account and to send the confirmation e-mail to the customer. The confirmation e-mail will be sent to the e-mail address entered in the shop account details. Using the link in the confirmation e-mail, a customer can reset the default password generated by the web store administrator and log in to the web store.

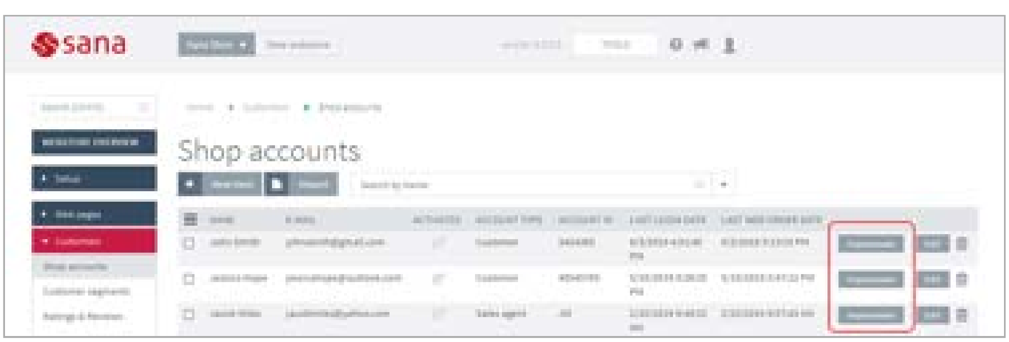
The **New Shop Account By Shop Admin** e-mail template is used to send a confirmation e-mail to a customer. For more information, see "E-mails".

Impersonate a customer

> **NOTE**
>
> **Applies to**: Sana 9.3.3 and higher

Sana brings a powerful feature for customer service. The **Impersonate** feature provides the ability for customer service representatives to access the web store with a customer account and see everything exactly as if you are a customer whom you are impersonating.

A customer service representative can impersonate a customer to help troubleshoot any issues that may occur. Therefore, when the customer contacts the help desk, the customer service representative can easily check what problem the customer is facing and help him or her. Using this feature, you can significantly improve the quality of support that you provide to your customers and make it more personalized.



It also opens the door to better interaction between customers and customer service representatives, for example if a customer needs some assistance with ordering, or an account manager with creating sub-accounts, or a sales manager with creating a prospect.

NOTE

Applies to: Sana 9.3.4

If a customer faces some difficulties in the checkout process, a customer service representative can impersonate the customer and place the order for him or her. If a customer service representative impersonates a customer and places an order in the Sana web store, then the e-mail address of the web store administrator will be recorded into the sales order in the ERP system. This way a sales manager in ERP can easily differentiate sales orders placed by the customer and customer service representative.

Check the relevant ERP article to see where the e-mail address of a web store administrator is stored:

Microsoft Dynamics NAV: Sales Order Data

Microsoft Dynamics AX: Sales Order Data

Microsoft Dynamics 365 Business Central: Sales Order Data

Microsoft Dynamics 365 for Finance and Operations: Sales Order Data

SAP ECC: Sales Order Data

To Import shop accounts from a CSV file

Step 1: In Sana Admin click: **Customers** > **Shop accounts**.

Step 2: Click **Import**.

Step 3: Download the **CSV Example** file and open it. This is just the template where you can enter the details of all shop accounts which you want to import. You will need to enter the same data as if you create a shop account in Sana Admin. See the CSV Example file. It can be downloaded directly from Sana Admin.

Step 4: Fill in the CSV Example file with the shop accounts details:

Field	Description
Name	The name of the customer (contact or sales agent).
EmailAddress	The e-mail address of the customer (contact or sales agent) which is used as a login name in the webstore.
Password	The password of a shop account which is used to log in the webstore. When the password field is empty, a password will be auto-generated. In this case, customers can change the auto-generated password in the webstore using the "Forgot password" feature on the "Login" page.
Activated	Determines whether a shop account is activated. Possible values: • "0" - Not activated • "1" - Activated

AccountType	The shop account type. Possible values: • "1" - Customer • "2" - Contact • "3" - Sales agent
AccountId	Account ID of the shop account. The account ID should be taken from your ERP system.
AccountRole	The shop account role. Possible values: • "1" - Regular account • "2" - Account manager • "3" - Sub-account The shop account role will be set to regular account, if value is empty. Only shop accounts of the "Customer" type can have the "Account manager" and "Sub-account" roles.

NOTE

If you use Microsoft Excel to fill in the CSV file with shop accounts, please remember that Excel does not correctly handle the special characters (after it is saved) that are specific for some languages, for example Spanish. Thus, if you have special characters, for example in the customer's name, you should use some other editor (for example Notepad) to fill in the CSV file that can correctly handle the special characters.

Step 5: When the CSV file is filled in with shop account details, on the **Import shop accounts** page click **Select file** to add the file.

Step 6: Enable the option **Send confirmation email to new activated shop accounts** to send the confirmation e-mail to new activated shop accounts. The confirmation e-mail will be sent to the e-mail address entered in the shop account details. The e-mail contains a link, using which a customer can reset the default password generated by a web store administrator and log in to the web store.

The **New Shop Account By Shop Admin** e-mail template is used to send a confirmation e-mail to a customer. For more information, see "E-mails".

NOTE

The option **Send confirmation email to new activated shop accounts** is available starting from **Sana 9.3.2**.

Step 7: Enable the option **Send confirmation email to existing activated shop accounts** to send the confirmation e-mail to existing activated shop accounts changed by a web store administrator. The confirmation e-mail will be sent to the e-mail address entered in the shop account details. The e-mail contains a link, using which a customer can reset the default password generated by a web store administrator and log in to the web store.

The **New Shop Account By Shop Admin** e-mail template is used to send a confirmation e-mail to a customer. For more information, see "E-mails".

NOTE

The option **Send confirmation email to existing activated shop accounts** is available starting from **Sana 9.3.2**.

Step 8: Click **Import** to import shop accounts from the CSV file.

NOTE

If a shop account already exists (based on the e-mail address), it will be updated.

Next

Shop Account Roles

Watch the video

Ordering process is critically important for most businesses and for some the order approval workflow is essential. It is used to enforce the business rules of a company to ensure that all orders are within budget.

In some organizations there are a lot of sales people and e-commerce managers who are involved in making the deals and purchases on behalf of a company. For some companies purchases require multiple levels of authorization that are built around unique business rules and departments. When sales people place orders on behalf of some company or department within a company, the system checks them against these rules.

Sana delivers support of different shop account roles and authorization procedure to meet your individual business requirements and convert the manual process of orders approval into fast and efficient automated process.

To manage shop account roles, in Sana Admin click: **Customers** > **Shop Accounts**. Any business customer can have one of the following shop account roles:

- **Regular account** - is a regular business customer.
- **Account manager** - is able to create and manage sub-accounts directly in the web store. Account manager can also place orders just like a regular customer.
- **Sub-account** - is able to place orders just like a regular customer. However, if the order exceeds the cost limit set for the sub-account in the web store, the order should be approved. Depending on the rules set for the customer with the sub-account role there might be a single or multiple levels of authorization.

NOTE

Account role can be set only for a business customer. Contacts and sales agents do not support account roles.

For more information, see "Shop Accounts".

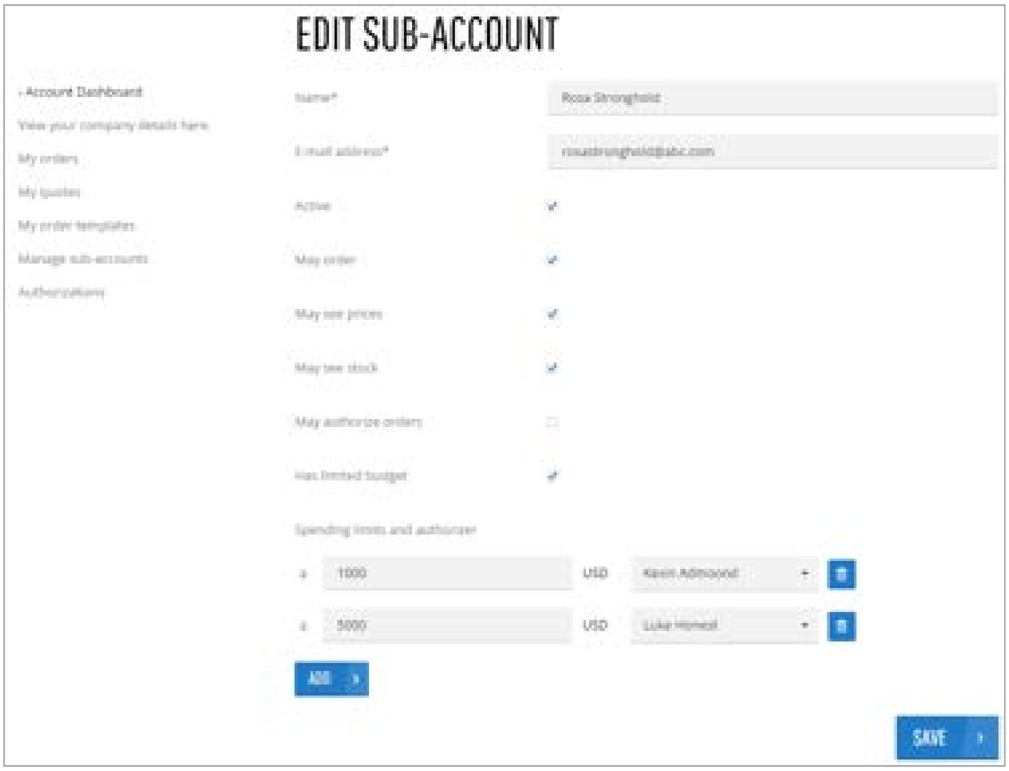
A web store administrator can create a shop account in Sana Admin for a business customer with the **Account manager** role. Account manager in his/her turn can create and manage his/her sub-accounts directly in the web store. All sub-accounts created by the account manager will be assigned to the same customer from the ERP system the shop account of the account manager is linked to. When the account manager creates a sub-account in the Sana web store, it will be available in Sana Admin with the sub-account role.

In the web store, the account manager can create and manage sub-accounts from the **My account** page > **Manage sub-accounts**.

The table below provides the description of the sub-account fields.

Field	Description
Name	Name of the sub-account.
E-mail address	E-mail address of the sub-account.
Activated	Activate the sub-account.
May order	Use this option to allow or prohibit creating orders for the sub-account. This option is available only if B2B customers are allowed to create orders and pay on account. Otherwise, sub-accounts will not be able to create orders. To check whether B2B customers can order, in Sana Admin click: **Setup** > **Products** > **Stock and assortment**, and check whether the option "**View and order**" is enabled for B2B customers. To check which payment type is used for B2B customers, in Sana Admin click: **Setup** > **Ordering & checkout** > **Ordering**, and check which option is selected in the "**Online order payments**" field for B2B customers.
May see prices	Use this option to show or hide prices in the web store for the sub-account. This option depends on whether price visibility is enabled/disabled globally in Sana Admin under: **Setup** > **Products** > **Price**. If it is disabled globally, this option will not be available and thus cannot be enabled for the sub-account.
May see stock	Use this option to show or hide stock in the web store for the sub-account. This option depends on whether stock visibility is enabled/disabled globally in Sana Admin under: **Setup** > **Products** > **Stock and assortment**. If it is disabled globally this option will not be available and thus cannot be enabled for the sub-account.
May authorize orders	Allow or forbid sub-account to authorize orders of the other sub-accounts who are associated with the same customer from the ERP system.
Has limited budget	Using this option you can limit sub-account's budget. If this setting is enabled, the account manager can assign authorizers to a sub-account and set a spending limit per authorizer. Orders which exceed this limit must be

Spending limits and authorizer	authorized either by another sub-account or account manager. • You can set up different spending limits and authorizers. • You can set up multiple authorizers for the same spending limit. In this case the order should be approved by one of the authorizers.



When the sub-account is created, the e-mail will be sent to the e-mail address entered in the sub-account profile. A customer should follow the link in the e-mail to enter the password which will be used to log in the web store.

Here is some information which you should know about customers with the sub-account role:

- When the sub-account is created, it will have the same **Account ID** (customer account from the ERP system) as the account manager.
- Sub-accounts can place orders just like regular customers.
- Sub-accounts can have limited budget, which means that their orders need to be authorized by other sub-accounts or account manager.
- Sub-accounts can place orders only if the **Online order payments** ordering setting for B2B customers in Sana Admin is set to **Full amount paid on account**.

When a sub-account places the order, the authorizer(s) will receive an e-mail, informing him/her that the order has been created and needs to be authorized.

Those sub-accounts and account managers who are set as authorizers can see all pending, approved and declined orders in the Sana web store under: **My account** > **Authorizations**.

On the **Authorization history** page each order has its own status:

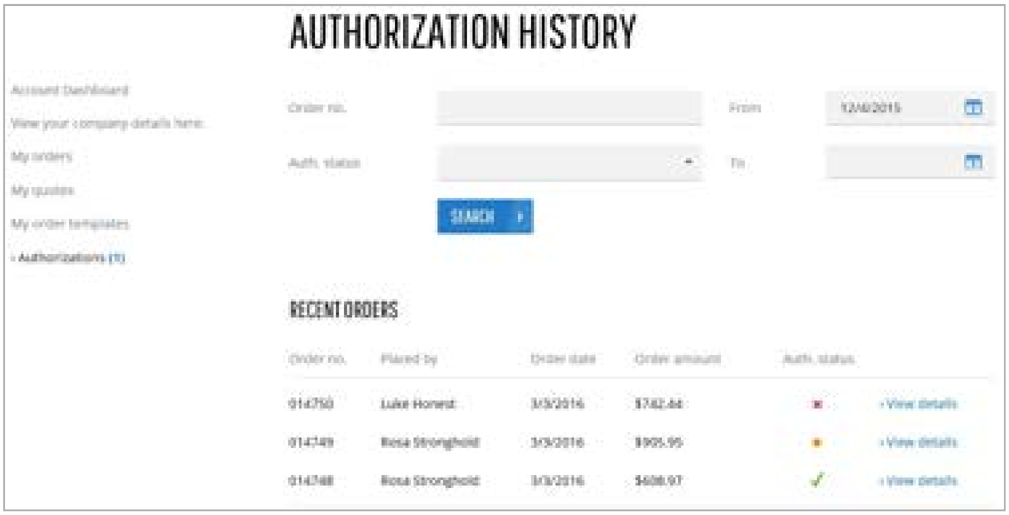
- declined

- approved

- pending

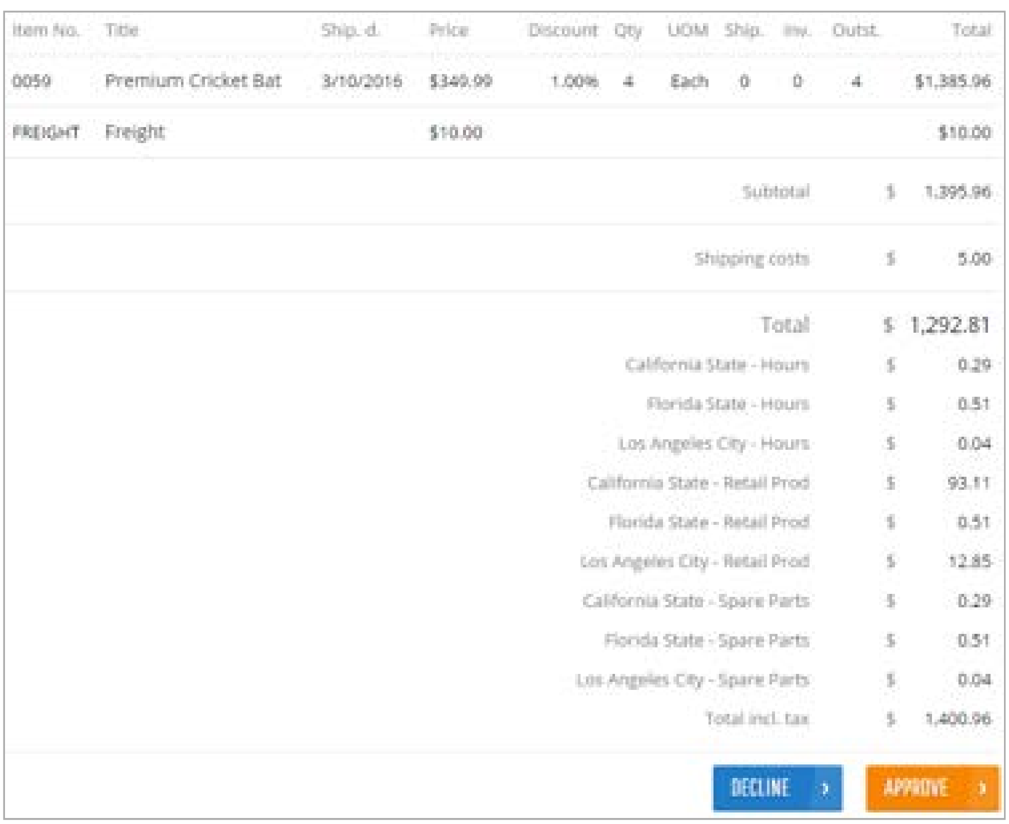
An authorizer can also search for the order by order number, and filter the orders by authorization status and date.

In the menu on the left, near the **Authorizations** menu item, the authorizer can see how many orders need to be authorized.

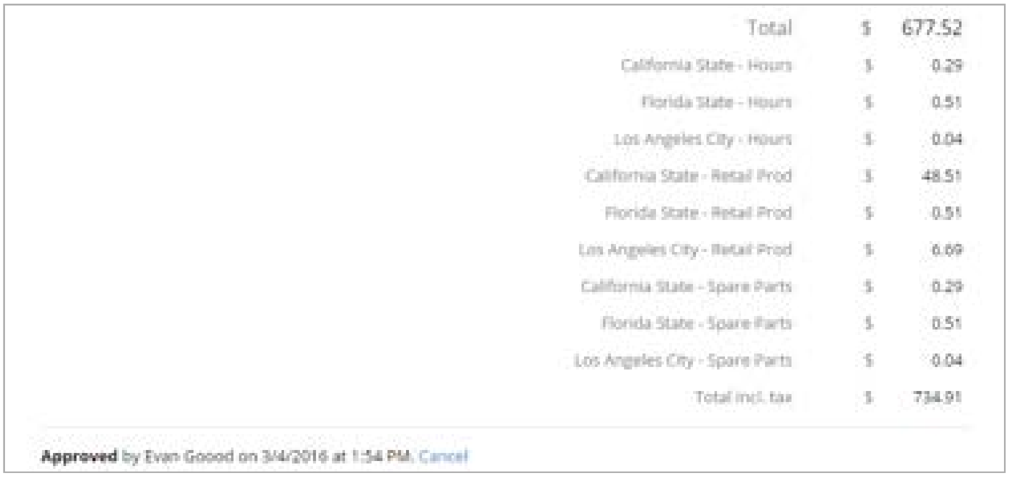


You can set up the **Authorization reminders** scheduled task which will send the reminders by e-mail to those account managers and sub-accounts who have orders that need to be authorized.

From the order details page of the order that needs to be authorized the authorizer can either **approve** or **decline** the order. In both cases a sub-account will get an e-mail with information about the order state. If an authorizer declines the order, he/she can write a feedback informing the sub-account why he/she declined the order.



If an authorizer approved or declined the order by mistake, he/she can also reverse authorization by clicking **Cancel** at the bottom of the order details page and decline or approve the order again. The ability to cancel authorization is available till the order status is "**open**" in the ERP system.



Information whether the order has been approved or declined and by whom is shown on the order details page to all authorizers with the same account ID and to the sub-account who placed the order.

The authorization status (approved/declined) of the order is also recorded into the sales order in the ERP system.

Account manager can create multiple sub-accounts and assign one or several authorizers to a sub-account, that's why the authorization procedure may have more than one scenario.

For example, if you assign two authorizers with similar spending limits to a sub-account, and one of the authorizers has approved/declined the order, the other one will see the message at the bottom of the order details page that the order has been already declined/approved by another authorizer. In case if the authorizer disagrees with authorization results, he/she can cancel it.

Sub-accounts also have a possibility to place quotes. If a sub-account has a limited budget and an authorizer, and he/she places a quote, it should be converted to order in the web store, and only after this, it will be possible to approve/decline the order.

For more information about quote to order conversion, see "Order Processing".

Authorizer validation

- When a user tries to remove an authorizer, change authorization rights or deactivate an authorizer, the error message will be shown notifying a user of why it is not possible to manage the shop account.
- When a user tries to unlink an authorizer from a sub-account who still has orders that should be approved or declined, the error message will be shown notifying a user of why it is not possible to unlink the shop account.

The accounts of the authorizers are validated both, in Sana Admin and in the Sana web store.

Pending authorization and declined orders in ERP

Orders which are created by sub-accounts and that are waiting for approval (not approved or declined yet) are not shown in the standard list of sales orders in ERP. This is because such orders must be first checked by the authorizers and either approved or declined in Sana.

Until then, a sales manager in ERP should not be able to post sales orders which are waiting for approval or declined, but only the approved orders. Once the order is approved, it will be shown in the general list of sales orders in ERP.

See also:

Microsoft Dynamics NAV: Orders Authorization

Microsoft Dynamics AX: Orders Authorization

Microsoft Dynamics 365 for Finance and Operations: Orders Authorization

Microsoft Dynamics 365 Business Central: Orders Authorization

Microsoft Dynamics GP: Orders Authorization

SAP Business One: Orders Authorization

SAP ECC: Order Delivery Block

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Customers

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Customer Segments

Watch the video

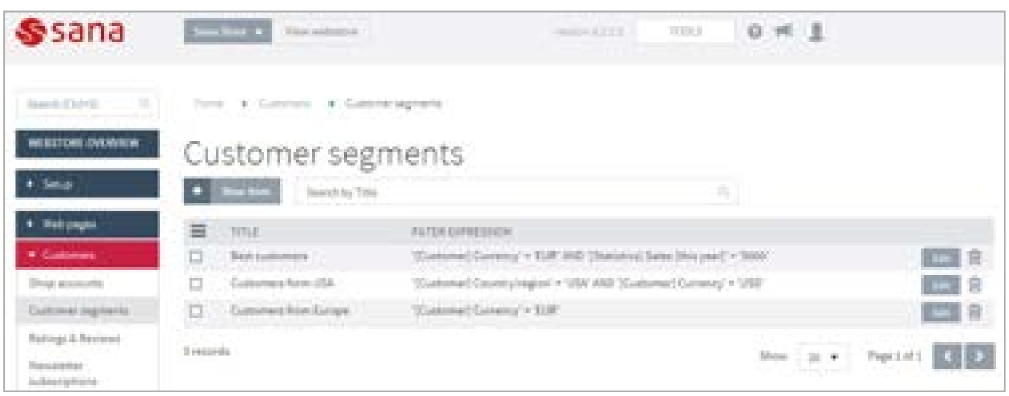
Customers' segmentation is a marketing strategy which involves dividing of a target market into subsets of customers that are similar in specific ways, for example customers from a certain country or those customers who are essential for your business prosperity. Because your individual customers have different needs, it will be easier to give them what they want if you divide them into groups and treat each group differently. Using customer segments you can build loyal relationships with customers by developing and offering them the products, content and services they want.

You can assign customer segments to:

- Content elements
- Menu items
- Payment methods
- Shipping methods
- Discount codes
- Cookiebar

When you assign a customer segment to Content Elements, Menu Items, Payment Methods, and Discount Codes, you will see the icon indicating that the customer segment is assigned.

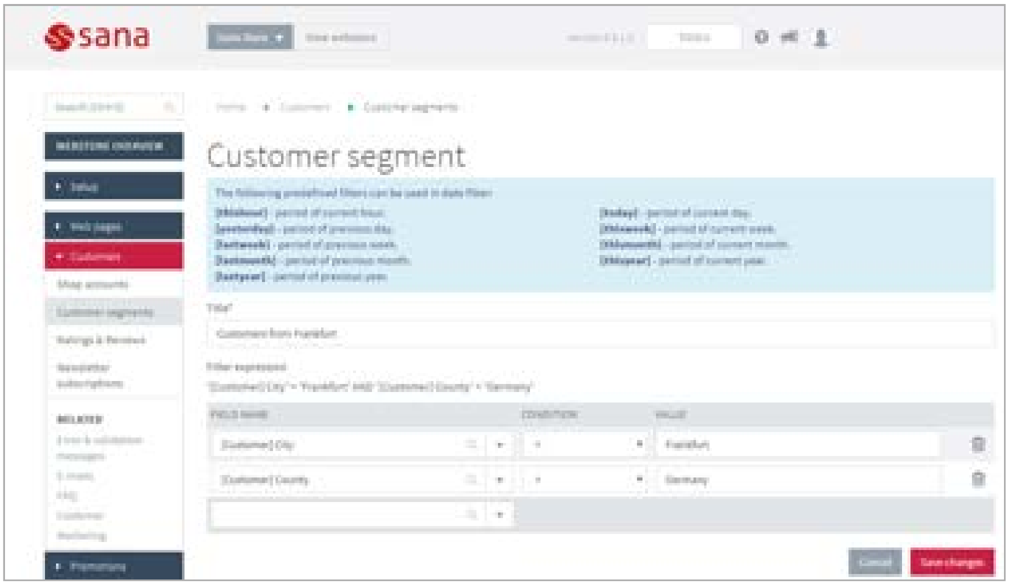
To create a customer segment, in Sana Admin click: **Customers** > **Customer segments**.



You can use the data from the Sana database and from your ERP system.

To create a customer segment, click **New item**, enter the title and set the filter expressions by specifying:

- **Field name**
- **Condition**
- **Value**



Filter expression is used to filter the customers that should be in the customer segment.

The field names in the **Field name** dropdown list are retrieved from different places.

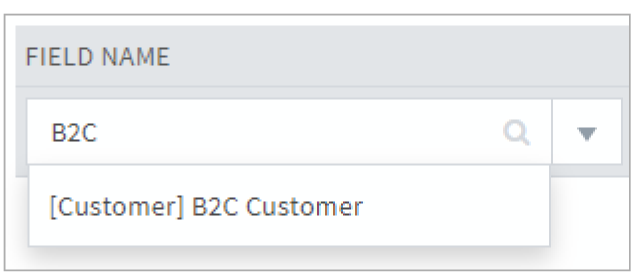
There are four sources of data which can be used to create customer segments:

- Customer data from ERP
- Customer's sales statistics from ERP
- Shop account from Sana database: last login date of a customer, whether a user is logged in or not, and shop account type (customer, contact and sales agent)
- Basket from Sana database: the date when the shopping cart was modified by a customer for the last time and how many hours ago, and the number of items in the shopping cart

Customer fields may differ depending on the ERP system you are connected to as customer fields are retrieved from the customers table in your ERP system.

NOTE

The Sana field **B2C Customer** is not available for customer segments if your web store is connected to **Microsoft Dynamics GP**. You cannot create customer segments to differentiate between B2C and B2B customers.



When you create a customer segment, filtering is performed by field, condition, value and by different filter expressions within the same field.

If you define different fields, filtering is fulfilled taking into account all selected fields. For example, if you create the customer segment by specifying filter expressions "Currency" = "USD" and "Country/region" = "USA", a group of customers who are from the United States with the currency dollar will be created. In this case the customers in your ERP system will be filtered by the fields "Currency" AND "Country/region".

If a customer segment contains filter expressions within the same field, it will include customers which fit at least one of the filter expressions of this field. For example, if you create a customer segment by specifying filter expressions "Total orders" < "100", "Total orders" between "200…500", and "Country/region" = "USA", the customer segment in which the customers placed "100" orders OR meet the range "200…500" will be created. In this case the customer segment will include the customers from the United States whose amount of total orders fits at least one of the filters or both.

Date fields

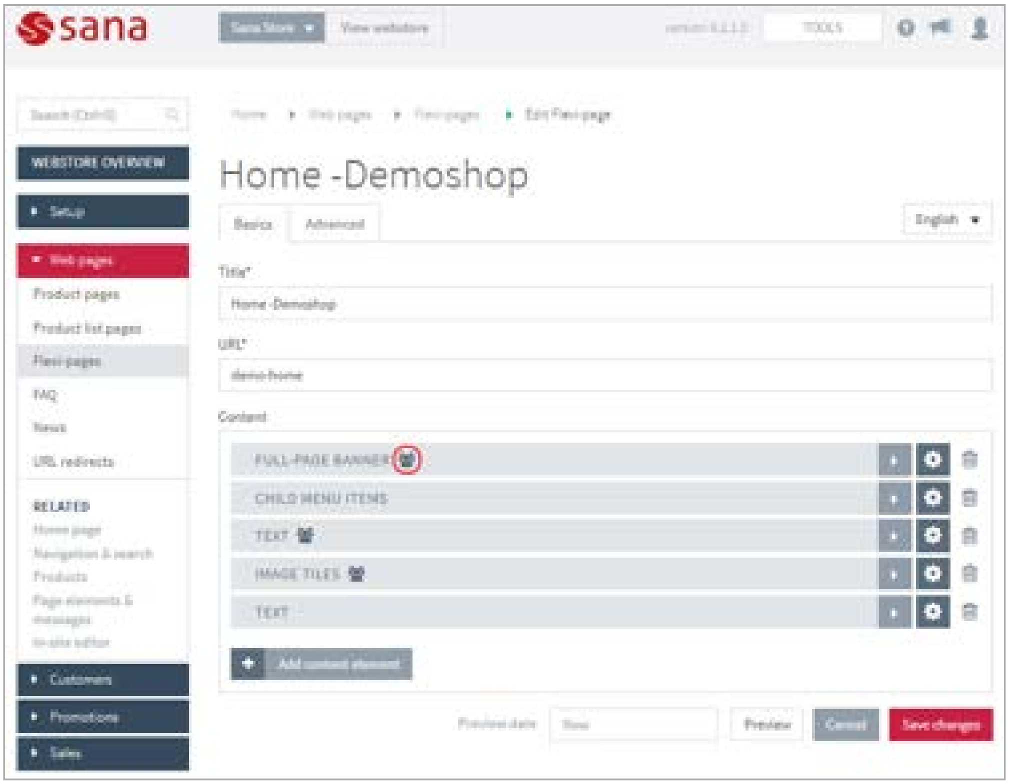
When you create a customer segment, at the top of the page you can see the list of predefined filters which you can use for date fields. You can either specify exact date using the calendar or you can use one of the predefined filters.

If you need to create a customer segment with some date fields, for example the last login date of a customer, you can now also use the predefined filter values, such as "[today]", "[thisweek]", "[lastmonth]", etc. This way you have more flexibility in using date filters and you don't need to update dates all the time.

Content management

Customer segments can be assigned to any content elements on the flexi-pages, product list and product pages. It allows to show different content elements on a page to specific customer groups. When you set up customer segments for the content elements of the page, you can show a certain content only to the customers which are in the customer segment. All other customers will not see this content element. This way you can fill your web store with the customer-specific content.

If you assign a customer segment to a content element, then you will see the icon  on the expandable item block. This way a user can see an overview of all content elements on a page to which customer segments are assigned and don't need to check the settings of each content element.



For more information about different pages which can be created for your web store and content management, see "Web Pages".

E-mail marketing

You can even use customer segments for the e-mail marketing extensions MailChimp and Dotdigital, to provide personalized messaging to the target audience. Use customer segments to create content for the promotional campaigns targeted to certain customers or market, or to satisfy your most profitable customers by giving them some discount offers and sending personalized e-mails.

Customer segments can be used for different purposes. The above mentioned scenarios are very useful in building marketing and promotional campaigns and thus loyal relationships with target audiences. But you can also use this feature for a different purpose, for example for A/B testing together with the MailChimp extension.

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Ratings & Reviews

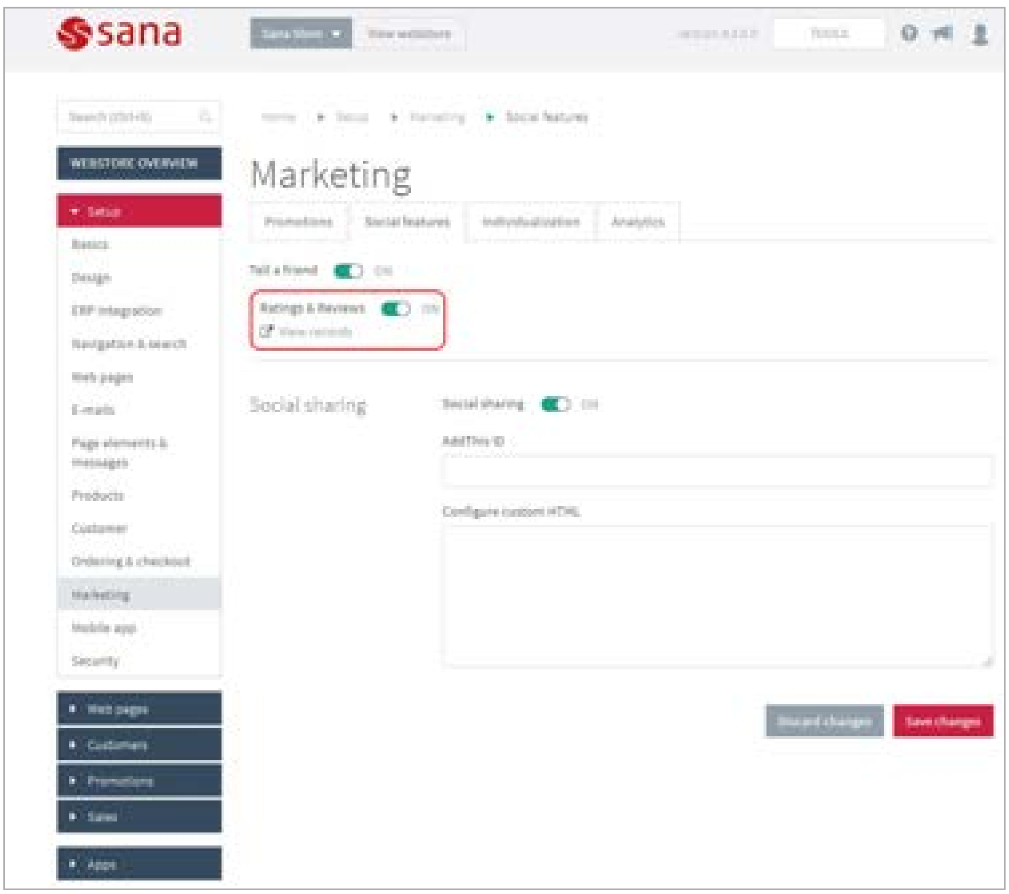
Watch the video

Ratings & Reviews allow customers to easily submit reviews of the products in the webstore. Product reviews are comments submitted by customers or webstore visitors directly on the product page.

Sana Admin user can manage product reviews using the built-in system.

Enable ratings & reviews

To enable ratings & reviews in Sana Admin click: **Setup** > **Marketing** > **Social features**.



Manage product reviews

Only approved ratings and reviews are shown in the webstore.

To manage ratings and reviews in Sana Admin click: **Customers** > **Ratings & Reviews**.

From here you can approve or disapprove ratings and reviews and edit the content.

In the webstore the users can see the average rating of a product and the approved reviews on the product page. A webstore visitor can see and write a product review even without registration. The average rating which is shown on the product page in the webstore is rounded up to the half of the star.

In Sana Admin on the **Ratings & Reviews** page you can see the list of all product reviews written by the webstore visitors. You can search for a specific product review by the item number, product title date or filter all product reviews by status (Approved, Disapproved or Unprocessed). All product reviews can be also sorted by the item number, product title, date, status or review title.

To approve or disapprove any product review click **Edit**. You can check the product review, edit its title and description and set its status to **Approved** or **Disapproved**. When a webstore visitor writes a product review, it is stored in Sana Admin with the **Unprocessed** status. Only when the product review status is set to **Approved** it will appear in the webstore on the product page.

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Customers

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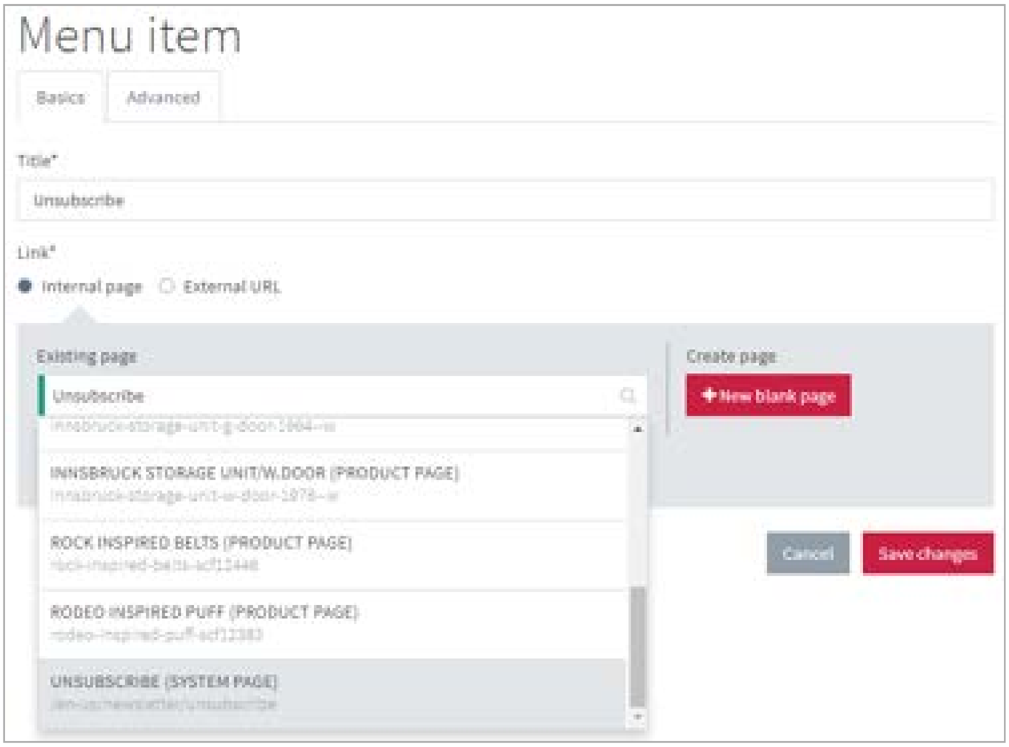
Newsletter Subscriptions

Newsletter subscription is a great way to establish relationship with your customers. You can use newsletters to keep your customers updated about some special events and other web store news.

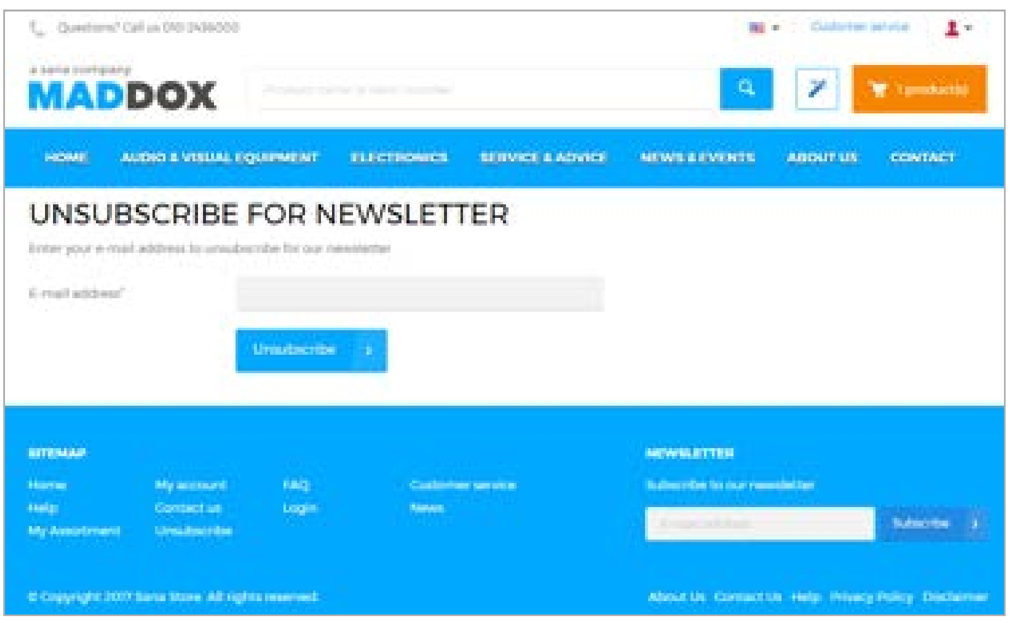
When newsletter subscriptions are enabled in Sana, the newsletter signup box is shown at the bottom of the Sana web store. Registered customers or web store visitors can enter an e-mail to subscribe to your web store newsletter.

Registered customers can unsubscribe by clicking on the link on the **My account** page.

There is also the **Unsubscribe** system page in Sana Admin which you can link to the navigation item.

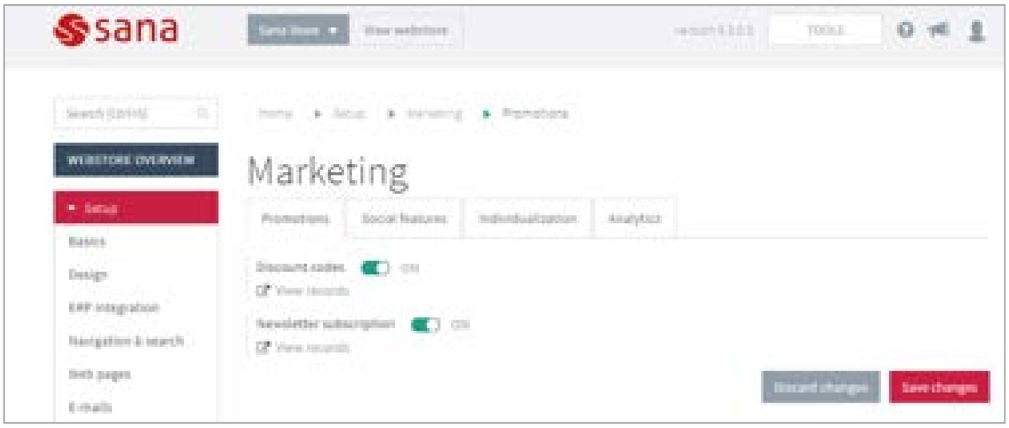


Web store visitors who are not registered in the web store, but subscribed to the newsletter, will be able to unsubscribe only using this system page. Thus, if you are using newsletter subscriptions, it's better to create a navigation item and link the **Unsubscribe** system page to it.



Enable newsletter subscriptions

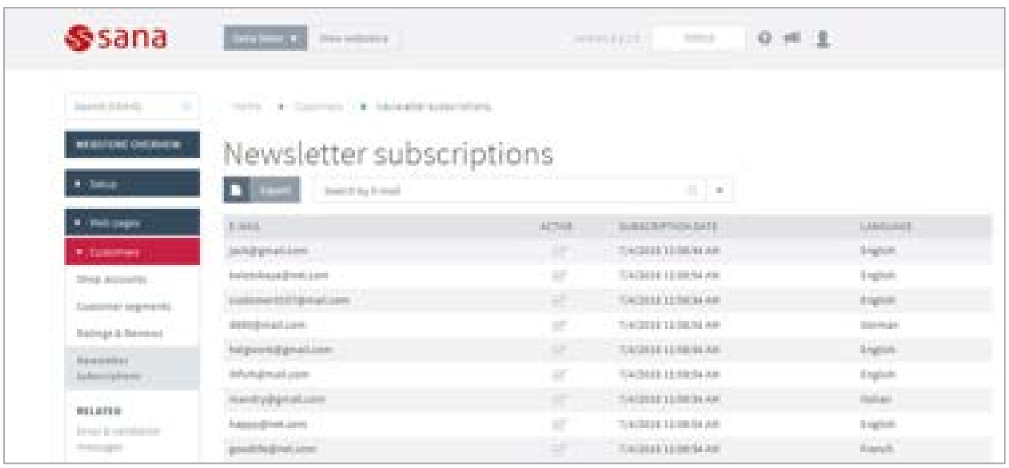
To enable newsletter subscriptions, in Sana Admin click: **Setup** > **Marketing** > **Promotions**.



View and export newsletter subscriptions

When a user subscribes to the newsletter, his or her e-mail, subscription date and language selected in a web store will be saved to Sana.

To view newsletter subscriptions, in Sana Admin click: **Customers** > **Newsletter subscriptions**.



On the **Newsletter subscriptions** page you can see the list of all subscribed users. If the **Active** check box is selected, this means that the user is subscribed to receive newsletters. If it is not selected, this means that the user has unsubscribed.

You can see when a user has subscribed to the newsletter in the **Subscription date** field.

You can search for a specific newsletter subscription by e-mail or filter all newsletter subscriptions by the **Active** status (**Yes** or **No**). All newsletter subscriptions can be also sorted by e-mail or by the **Active** status.

To import the newsletter subscriptions to a mass mailing tool, you can export all newsletter subscriptions from Sana to the CSV file. It stores the e-mail addresses of the subscribers, web store name, whether a customer is subscribed or unsubscribed, the subscription date and the language used by the customer. When you know the language which your customer selected while subscribing to the newsletters, you can send the newsletters to your customers in their own language. To export all newsletter subscriptions to the CSV file, click **Export**.

In addition to the standard Sana feature which adds a newsletter signup box to the footer of the Sana web store, Sana also provides the "Newsletter" add-on which can be used to add a newsletter signup box to a web page. For more information, see "Newsletter".

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Promotions

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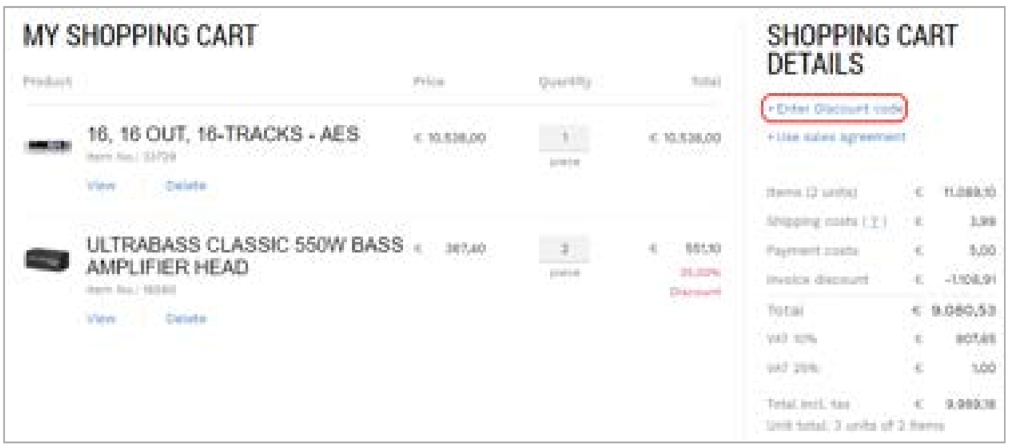
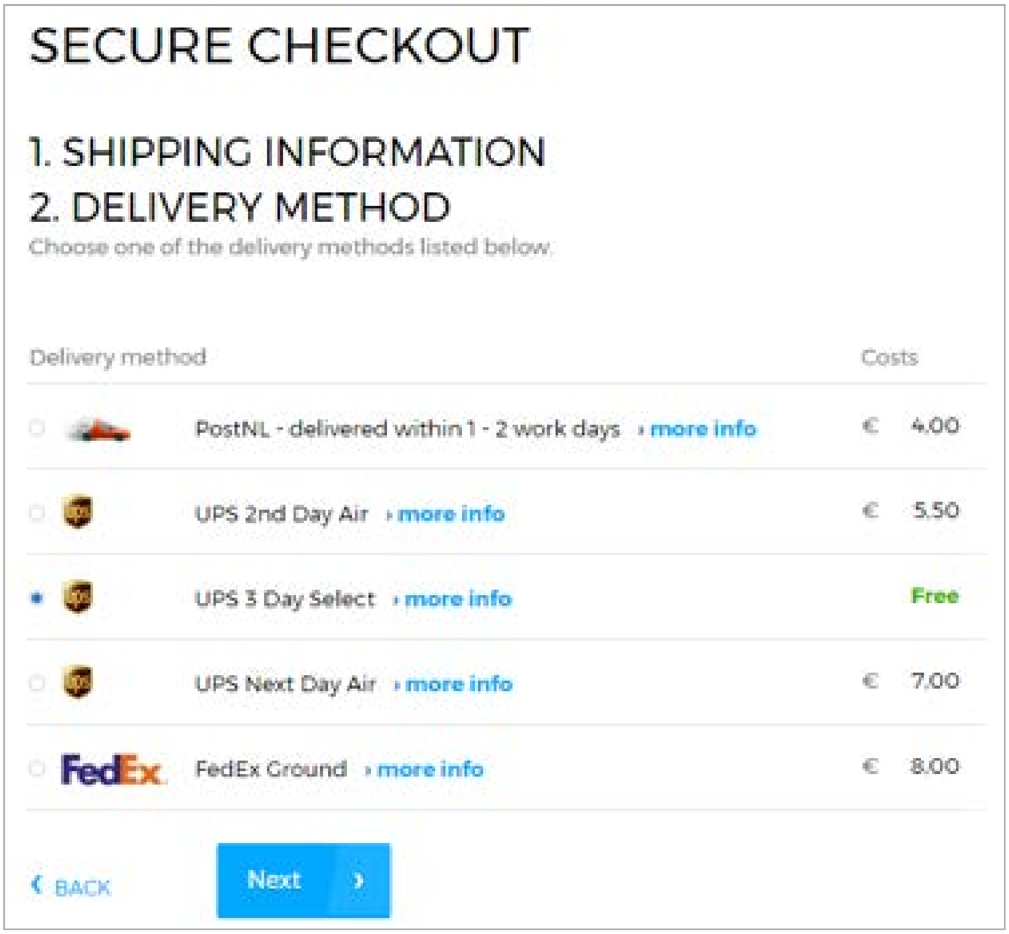
Discount Codes

Sana supports the diverse functionality of Microsoft Dynamics retail offers, but it also has its own functionality of discount codes.

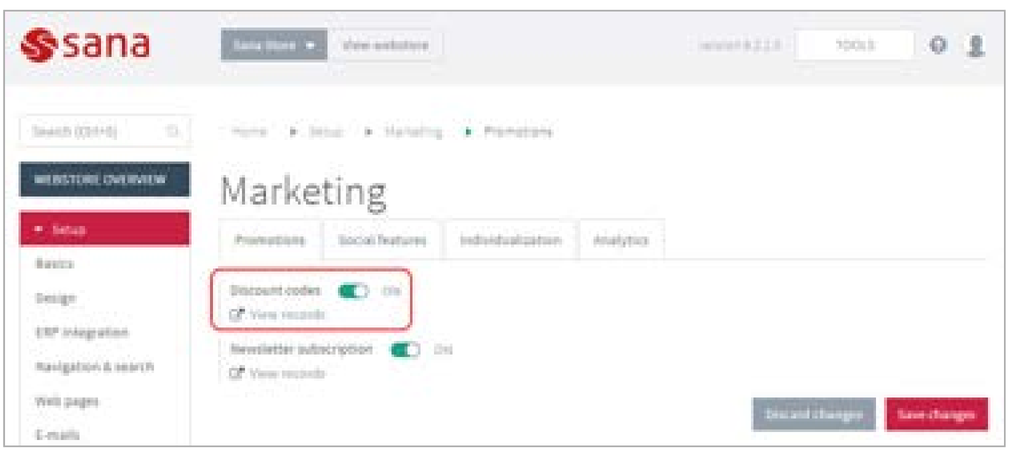
In Sana Admin you can create discount codes that can be entered in the shopping cart and give either a percentage or a fixed amount discount on the total order amount. A discount code is applied to all products in the shopping cart and it is posted to the sales order header in ERP.



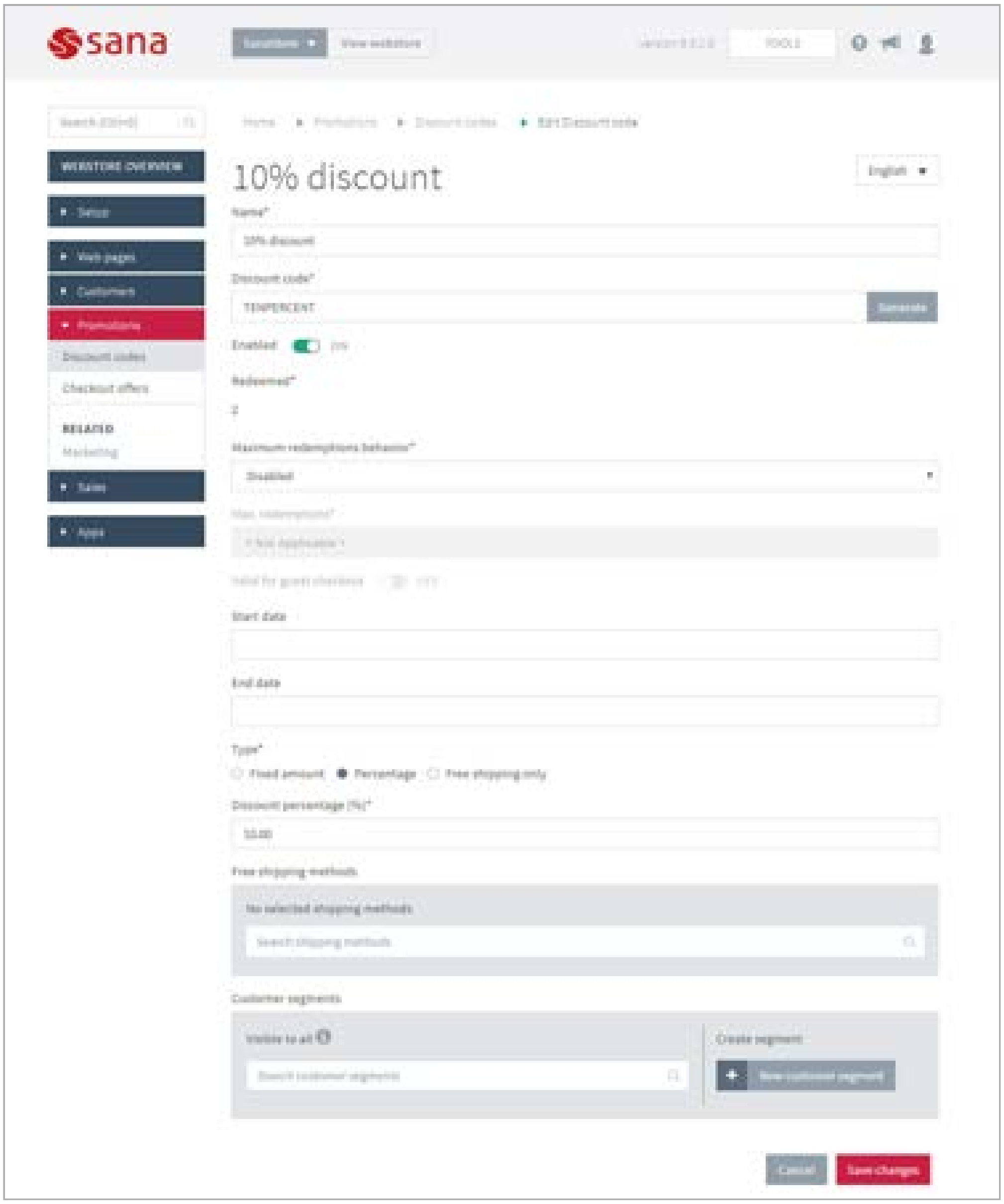
Moreover, you can create a discount code that allows delivery with a certain shipping method free of charge.



To enable/disable discount codes in Sana Admin, click: **Setup** > **Marketing** > **Promotions** > **Discount codes**.

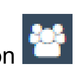


To create discount codes in Sana Admin, click: **Promotions** > **Discount codes**.



The table below provides the description of the discount code fields:

Field	Description
Name	Enter the name of the discount code. This name will be shown in the shopping cart, when the discount code is entered by the customer. You can enter the discount code name in any installed language.
Discount code	Enter the discount code or generate it automatically. It should be at least 6 characters long and not more than 50.
Enabled	Enable/disable the discount code.
Redeemed	In the **Redeemed** field you can see how many times the discount code has been used by the customers.
Maximum redemptions behavior	Select redemptions behavior: • **Disabled** - a discount code can be used an unlimited number of times. • **Maximum total redemptions** - when you select this option, you can specify the number of **Max. redemptions** - how many times the discount code can be used. When this number is exceeded, the discount code will be invalid.

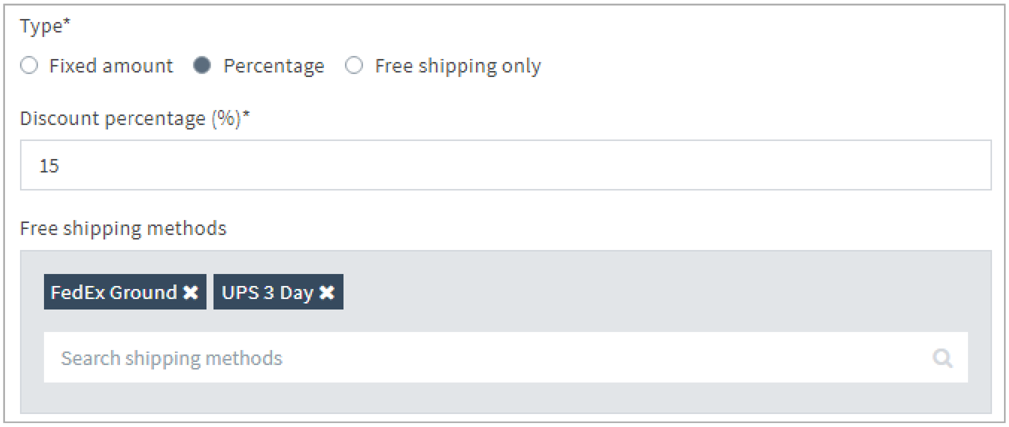
	• **Maximum redemptions per shop account** - when you select this option, the discount code usage is limited per customer. You can specify the number of **Max. redemptions** - how many times the discount code can be used by a customer. If you select **Maximum redemptions per shop account**, you can also allow or prohibit guests using the discount code. Guest customers can use discount codes as many times as they want.
Max. redemptions	Here you can enter how many times the discount code can be used either by all customers or by each customer individually depending on the option selected in the field **Maximum redemptions behavior**.
Start date	You can use the dates to specify the period when the discount code should be valid.
End date	
Type	Select the discount type: • **Fixed amount** - enter the discount amount. You should enter amount including tax and amount excluding tax per currency. The appropriate amount is used for the discount depending on the customer's tax settings in your ERP system. **See also:** Discounts in NAV Discounts in AX Discounts in Dynamics 365 for Finance and Operations Discounts in SAP B1 Discounts in SAP ECC • **Percentage** - enter the discount percentage. • **Free shipping only** - the discount code of this type enables delivery free of charge for the selected shipping methods. If you want to use this shipping type, you must also select **Free shipping methods**. Below you can read more details about free shipping.
Customer segments	Using customer segments, you can make the discount code valid only for customers that meet the criteria set in the customer segment, for example profitable customers. If you assign a customer segment to a discount code, then you will see the icon  on the **Discount codes** page. This way a user can see an overview of all discount codes on a page to which customer segments are assigned and don't need to check the settings of each discount code.

Free shipping discount code

You can create a discount code which enables free delivery for a certain shipping method, and you can also provide both, free delivery and a discount on the total order amount.

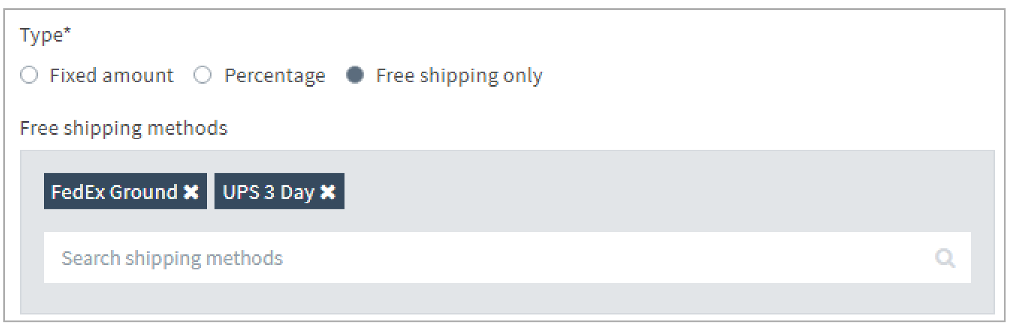
Scenario 1

You can set up fixed amount or percentage discount and add free shipping methods. When a customer applies such discount code, he or she gets a discount on the total order amount and can select a shipping method with free delivery.



Scenario 2

You can create a discount code of the type **Free shipping only** and add **Free shipping methods**. This discount code does not give a discount on the total sales order amount, but enables free delivery for the selected shipping methods.



Translate discount code name

The names of the discount codes can be translated to any installed language.

On the **Discount codes** page, you can select a language and translate any discount code name to the selected language, if your webstore is multi-lingual. Two columns **Name** will be shown, when the language is selected. The first column stores the discount code name in the default language (English), the second column stores the translated discount code name to the selected language. If in the second column you see a greyed out link **Translate**, this means that there is no translation for the related discount code. You can click **Translate** to translate the name of the discount code.

You can also translate any existing discount code name from its discount code details page. Find the discount code you want to translate and click **Edit**. On the discount code page select a language into which you want to translate its name.

When you translate the discount code name, it is presented in two columns. The first column stores the discount code name in the default language (English) and it is not editable, while in the second column you can provide translation in the selected language.

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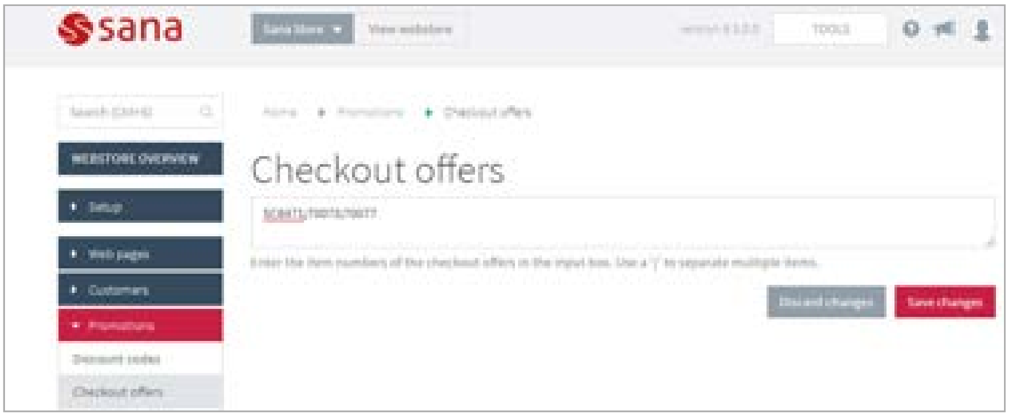
Checkout Offers

Watch the video

In Sana Admin click: **Promotions** > **Checkout offers**.



Checkout offers are the products that are offered to a customer in the shopping basket. This can be for example daily deals, holiday offers, products with different discount offers, etc.

If you want to show checkout offers, in Sana Admin in the **Checkout offers** input box enter the item numbers of the products. Product variants codes are not supported. You should enter only the item numbers. Use the ";" character to separate multiple items.

In the webstore checkout offers are shown at the bottom of the shopping basket in the checkout offers area.

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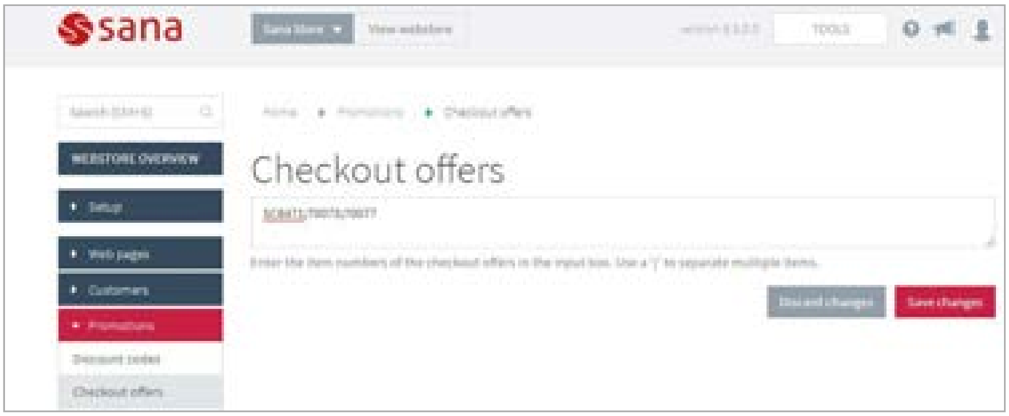
Checkout Offers

Watch the video

In Sana Admin click: **Promotions** > **Checkout offers**.



Checkout offers are the products that are offered to a customer in the shopping basket. This can be for example daily deals, holiday offers, products with different discount offers, etc.

If you want to show checkout offers, in Sana Admin in the **Checkout offers** input box enter the item numbers of the products. Product variants codes are not supported. You should enter only the item numbers. Use the ";" character to separate multiple items.

In the webstore checkout offers are shown at the bottom of the shopping basket in the checkout offers area.

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Sales Statistics

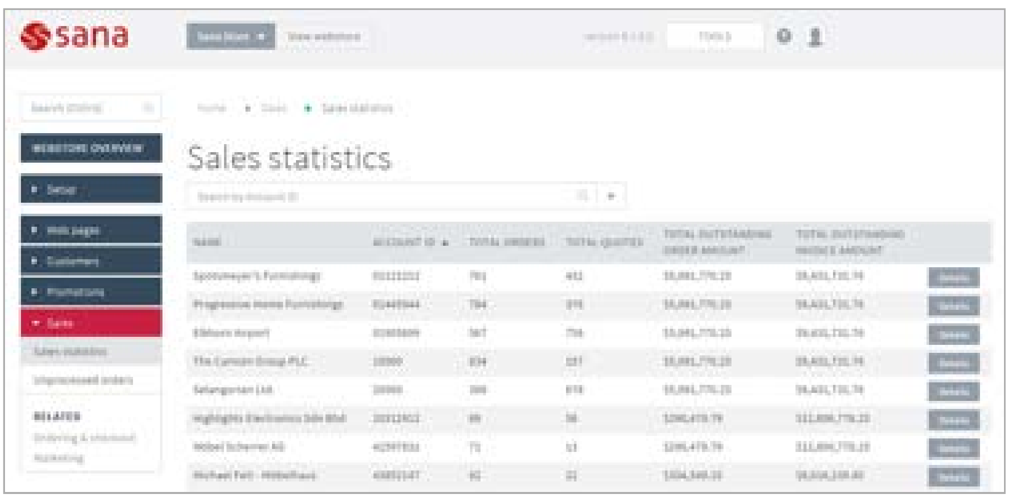
Watch the video

NOTE

Sales statistics is supported by the Sana web store integrated with SAP Business One for SAP HANA starting from Sana 9.3.4.

The ERP systems gather the detailed sales statistics for each customer. Now this sales statistics from ERP can be seen directly in Sana Admin. These reports include information about total orders, total quotes, total outstanding order amount, total outstanding invoice amount as well as profits, order returns, discounted amounts, etc. per customer within a specific time period.

To open sales statistics in Sana Admin click: **Sales** > **Sales Statistics**.



Sales statistics is available only for customers which have shop accounts in Sana Admin. If you have contacts or sales agents accounts sales statistics will not be shown for them.

Sales statistics provides two types of information: general and sales. When you open the details of the customer's sales statistics for the first time, both, general and sales information is retrieved from the ERP system and placed into the SQL database. Next time when you open the details of the customer's sales statistics, all data will be retrieved not from the ERP system, but from the SQL database. This is done for performance reasons, not to request a big amount of data each time from the ERP system.

Sportsmeyer's Furnishings

GENERAL	
Total orders	761
Total quotes	432
Total outstanding order amount	5,991,770.25
Total outstanding invoice amount	9,431,731.76

SALES	This year	Last year	To date
Sales	800.00	403,757.77	15,161,453.90
Quotes	300.00	480,452.71	2,495,885.08
Profits	0.00	9,750.89	11,072,814.18
Reminders	0.00	0.00	0.00
Overdue amounts	9,431,731.76	9,431,731.76	9,431,731.76
Invoiced amounts	0.00	11,137.88	11,106,687.46
Paid invoices	0.00	0.00	1,674,955.70
Discounted amount	0.00	0.00	0.00
Order returns	0.00	0.00	-2,976.00
Order frequency	8	111	761
Quote frequency	3	113	432
Order return frequency	0	0	2

Most probably, you will not need to check sales statistics frequently. When sales statistics is recorded into the SQL database and shown from there you will not see the latest customer's sales statistics from ERP in Sana Admin. If you want to check the latest sales data for the customer you can easily update sales statistics for all your customers. To update sales statistics for the customers run the **Sales statistics import** task in Sana Admin: **Tools** > **Scheduled tasks**.

This task retrieves the latest sales statistics for all your customers from the ERP system and saves it to the SQL database.

Using sales statistics you can identify your most profitable customers. Once you know who these customers are, you just have to find ways to keep them happy and bring in more people like them. In combination with pricing and discounts functionality available in your ERP system, customer segments and MailChimp integration you can show your best customers how deeply you appreciate their business and confidence. To build and deepen relationships with each individual customer or your most profitable customer segment you can, for example, give them a discount, or some kind of a multi-buy, or mix & match, or threshold offer for the next purchases. Send them a personalized e-mail via MailChimp or create a customer-specific content on your web store using customer segments to promote loyalty and keep your customers delighted.

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Sales

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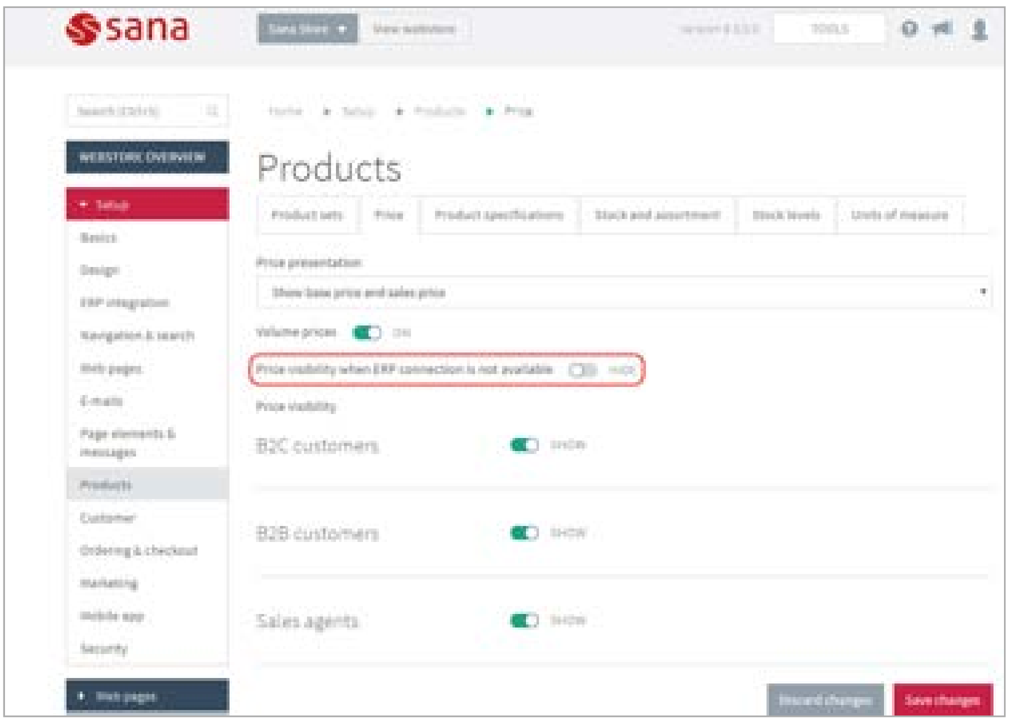
Unprocessed Orders

Watch the video

Sana Commerce allows to accept orders when there is no connection to your ERP system. This allows to continue business operations without interruption, even when connection to your ERP system is not available for some reasons.

Sales orders that are placed in the webstore when there is no ERP connection can be viewed and processed in Sana Admin: **Sales** > **Unprocessed orders**.

In the maintenance mode you can show/hide prices in the webstore. To enable/disable prices in the maintenance mode in Sana Admin click: **Setup** > **Products** > **Price** > **Price visibility when ERP connection is not available**. Enabling this option requires reindexing of the products. You can run the **Product import** task only if the ERP connection is available.



If your webstore is in the maintenance mode and the option **Price visibility when ERP connection is not available** is enabled, only the list prices will be shown in the webstore. In the maintenance mode the customers will be able to see the prices based on the latest indexed list prices. The customer specific prices, trade agreements, discounts and volume prices are not available.

In the maintenance mode the stock is not shown in the webstore and availability of products does not depend on stock.

When a customer places an order and the webstore is in the maintenance mode, on the **Order overview** step of the checkout process the customer will be notified that his/her order will be processed later (when the webstore is online) and the prices will be recalculated.

When the order is placed in the maintenance mode in the webstore, the customer will receive the order confirmation e-mail.

When the order is processed in Sana Admin, the customer will receive the order payment e-mail with the recalculated prices and link to the page where he/she can pay the order. When the order is paid, the customer will receive one more order confirmation e-mail.

The text of the order confirmation and payment e-mails can be managed in the e-mail templates:

- **Unprocessed Order Confirmation** - is sent to the customer when the order is placed in the maintenance mode.
- **Order Payment** - is sent to the customer when the order has been processed in Sana Admin. In this e-mail the customer can see the order details with actual prices and proceed to the payment page.
- **Payment Confirmation** - is sent to the customer when the order is paid.

For more information about e-mail templates, see "E-mails".

To view and process the orders which are placed in the maintenance mode:

Step 1: In Sana Admin click: **Sales** > **Unprocessed orders**.

The orders can be processed only when the ERP connection is available.

In Sana Admin on the **Unprocessed orders** page you can see all sales orders that are placed in the webstore when the maintenance mode is activated. When you open the **Unprocessed orders** page only the new orders (unprocessed) are shown, but you can clear the filter to see all orders that are placed in the maintenance mode. You can search the orders by customer name or account ID, filter by order date and show only unprocessed orders or all orders. The orders can be also sorted by order date.

Step 2: To process the order, click **Edit**. You will see the order details.

Step 3: On the **Order details** page, click **Process order**. The order will be recalculated and you will see the actual prices.

Step 4: When the order has been processed, click **Send order payment mail** at the top of the order details. The order payment e-mail containing order details with actual prices will be sent to the customer from which he/she can open the order payment page to pay the order.

The processed orders are synchronized with your ERP system and stored there. When the order has been processed in Sana Admin, its state is set to **Synced**.

See also:

Maintenance Mode

Scheduled Tasks

Sales

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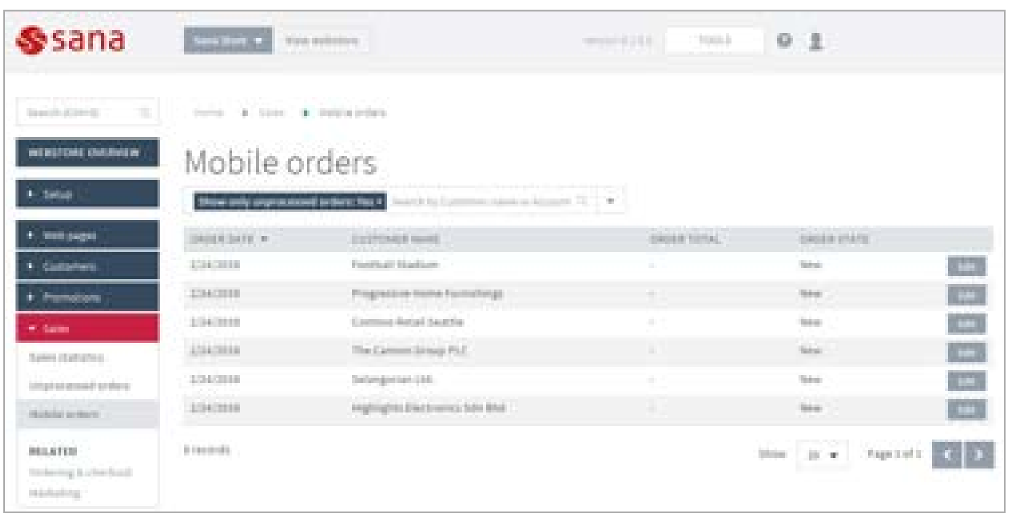
Mobile Orders

Watch the video

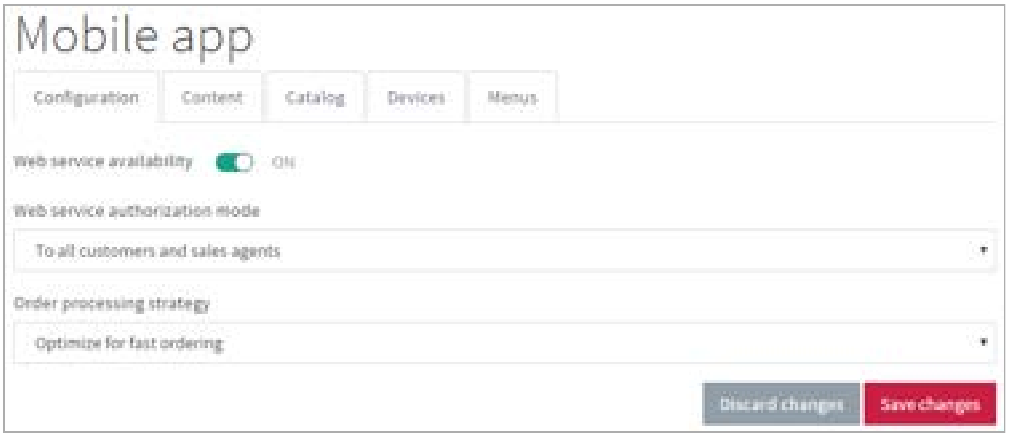
> **NOTE**
>
> We stopped developing and selling the Sana mobile application. It was replaced by the responsive design of the Sana web store. There will be no new versions of the Sana mobile app. Our current customers can continue using the mobile app.
>
> Since we still have customers who use the mobile app, we didn't remove the settings used to set up the app in Sana Admin. Starting from **Sana 9.3.2**, those customers who do not have the Sana mobile app (it is not included into the Sana license) will not see the menu items and settings used for the mobile app in Sana Admin.

> **NOTE**
>
> Only the user with the **Mobile manager** and **Order processor** roles can access the **Mobile orders** page.

In Sana Admin click: **Sales** > **Mobile orders**.



On the **Mobile orders** page you can see those orders which are placed from the Sana mobile app using the order processing strategy that is optimized for fast ordering.



This order processing strategy might be useful if you have unstable Internet connection and you have problems with sending the orders directly to the ERP system or you need to quickly place a lot of orders, which you can easily send all at once to the ERP system from Sana Admin anytime.

For more information about Sana mobile app order processing strategy that is optimized for fast ordering, see "Configuration".

When a sales agent places an order from the Sana mobile app and the **Order processing strategy** is set to **Optimize for fast ordering** such order is stored in the Sana SQL database and can be seen in Sana Admin. The orders which are not processed yet are with a **New** order state.

When you open the **Mobile orders** page only the new orders (unprocessed) are shown, but you can clear the filter to see all orders that are placed from the Sana mobile app using the order processing strategy which is optimized for fast ordering. You can search the orders by customer name or account ID, filter by order date and show only unprocessed orders or all orders. The orders can be also sorted by order date.

The mobile manager can view order details directly from Sana Admin and even delete the unprocessed order if there is a necessity. A real order number and prices will be available only when the order is synchronized and sent to the ERP system.

The unprocessed mobile orders can be sent to the ERP system by running the **Mobile orders processing** scheduled task from Sana Admin: **Tools** > **Scheduled tasks**. When you run this task all unprocessed mobile orders are recalculated and sent to the ERP system. In Sana Admin the state of the mobile orders will be changed to **Synced** and the mobile manager can see the prices and real order numbers from the ERP system.

It might happen that something went wrong with the order when it is sent to the Sana SQL database or to the ERP system. In this case the error message will be shown on the order details page in Sana Admin allowing the mobile manager to solve the problem.

To update the status of the orders in the Sana mobile app after they are sent to the ERP system you should also synchronize the orders from the app.

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User Management

Watch the video

NOTE

Only the user with the **System administrator** role can create and manage Sana Admin users.

To manage Sana Admin users click: **Tools** > **User management**.

In Sana Admin you can create users with different roles. The assigned role determines the user's function and permissions within the system.

The following roles are available:

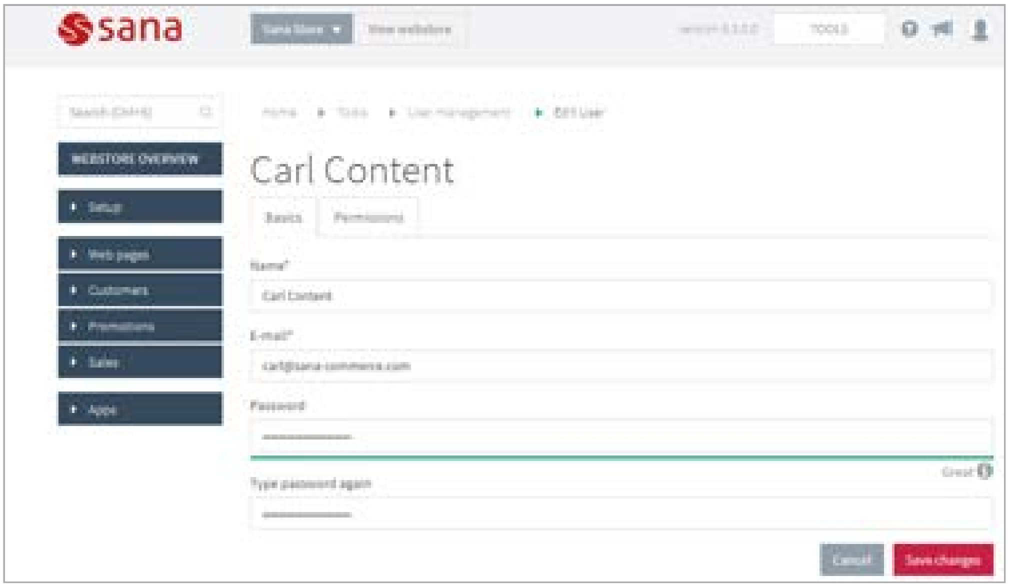
- System administrator
- Product content manager
- Order processor
- Marketer
- Mobile manager
- Shop account creator

When you install Sana Commerce and run Sana Admin for the first time, you will be asked to create the Sana Admin user. This user will have the System administrator role. After that you can create different users and give them the necessary permissions by assigning the appropriate role(s).

Basics

To create Sana Admin user:

Step 1: In Sana Admin click: **Tools** > **User management**.



Step 2: Click **New item**.

The table below provides the description of the fields that should be filled in on the **Basics** tab to create Sana Admin user:

Field	Description
Name	Enter the name of the Sana Admin user. The name of the logged in user is shown at the top of Sana Admin if you click on the icon  .
E-mail	Enter the e-mail of the Sana Admin user. The user's e-mail is used to log in Sana Admin.
Password **Type password again**	Enter the password that is used to log in Sana Admin. Make sure that password is strong enough. Do not use the words such as 'admin', 'administrator', a webstore name or your name because these words are predictable and can be easily guessed. For a password, use the combination of letters, capital letters, special characters and numbers. The password must be at least 7 characters long.

Permissions

On the **Permissions** tab, System administrator can assign a role to the Sana Admin user.

One role as well as multiple roles can be assigned to the user. In case of a multi-store solution, System administrator can grant access to the management of different webstores.

Manage user's permissions:

Step 1: On the **Permissions** tab, select one or multiple roles that should be assigned to a user.

Step 2: Select one or multiple webstores that a user should be able to manage.

See the list of permissions for each user role in the "Roles & Permissions" file.

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ERP Connection

Watch the video

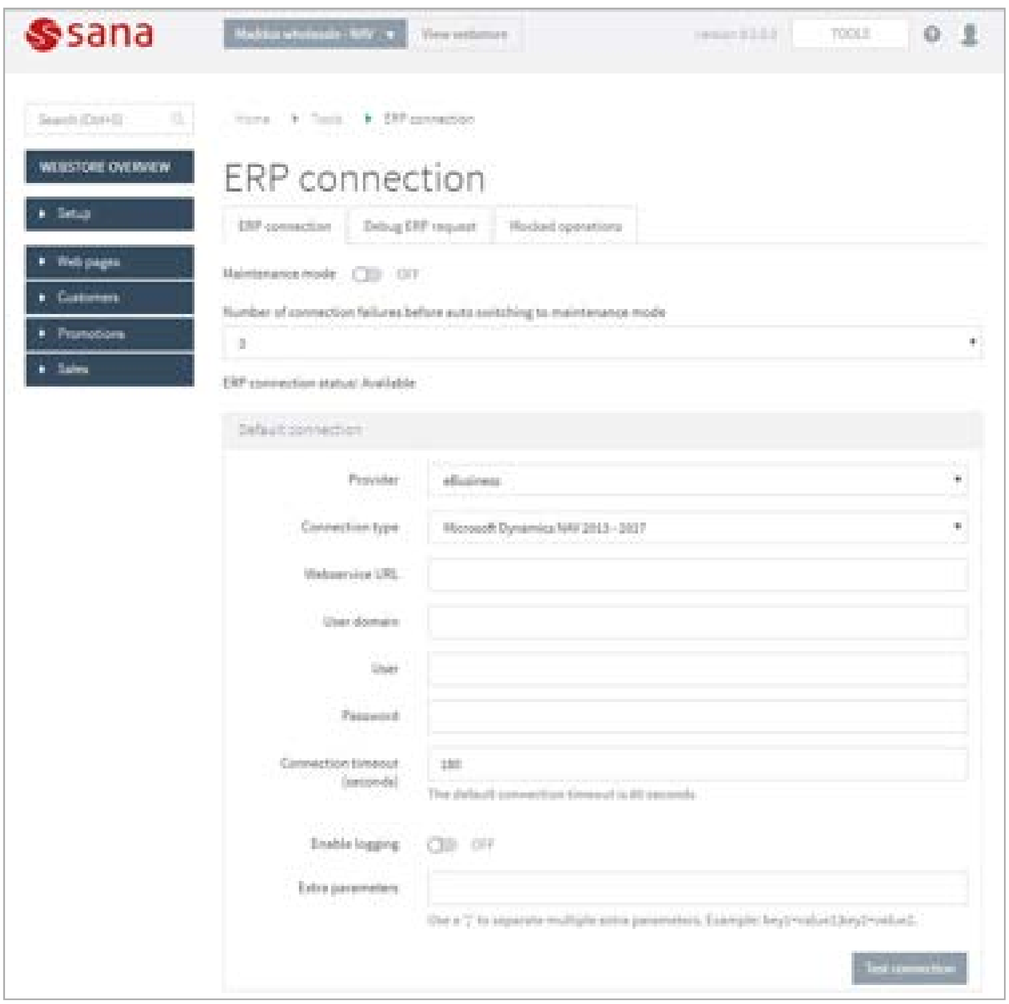
Sana is the ERP integrated e-commerce solution. This integration is unique in the sense that all information used in your web store comes directly and in real-time from a single place, your ERP system. As all master data is managed and stored in a single ERP database, you can prevent data inconsistency and ensure that all your departments work with the same data.

Sana connects to the ERP system through the Web service.

To establish connection between Sana and your ERP system, in Sana Admin click: **Tools** > **ERP connection**.

Default Connection

In the **Default connection** area, you can set up connection to the ERP system.



The table below provides the description of the ERP connection settings:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Provider</td><td>Type of provider.

Sana Commerce delivers only one global provider type - eBusiness, which can be connected to any ERP system.

By default Sana Commerce is integrated with:
Microsoft Dynamics AX
Microsoft Dynamics NAV
Microsoft Dynamics GP
Microsoft Dynamics 365 Business Central
Microsoft Dynamics 365 Enterprise Edition
SAP ECC
SAP Business One</td></tr>
<tr><td>Connection type</td><td>Select your connection type. The connection type determines which ERP system you are connecting to.</td></tr>
<tr><td>Webservice URL</td><td>Enter the webservice URL of your ERP system.

If you do not have the webservice URL, contact the person who is responsible for setting up your ERP environment.

See examples:
Microsoft Dynamics NAV
http://domain.com:7047/DynamicsNAV/WS/CompanyName/Codeunit/SC_NAV_WebService

Microsoft Dynamics AX
http://domain.com/AX2012WebService/AXService.svc</td></tr>
<tr><td>User domain</td><td rowspan="3">Enter the domain and credentials of the user who is accessing the ERP system.

If you do not have the domain and credentials of the user who is accessing the ERP system, contact the person who is responsible for setting up your ERP environment.</td></tr>
<tr><td>User</td></tr>
<tr><td>Password</td></tr>
<tr><td>Connection timeout</td><td>Determines the time to wait while trying to establish a connection before terminating the attempt. You can set the amount of time in seconds a connection waits to time out. A connection timeout means that a server is taking too long to reply to a data request.

Default: 60 seconds</td></tr>
<tr><td>Enable logging</td><td>If logging is enabled all requests from the Sana Admin and webstore to ERP and responses will be written into the tracelog file on the server.
By default logging is disabled as it affects performance. Therefore, it is better to use it only for debugging purposes.

For more information about logging in Sana Commerce, see "Sana Commerce Logging".</td></tr>
</table>

Extra parameters	This field is used when you need to specify some extra parameters in the connection to ERP. Use the ";" character to separate multiple parameters.

When connection to your ERP system is configured, click **Test connection** to check whether the connection is available.

Custom connections

Custom ERP connections are used for more complex and advanced hosting scenarios.

Below you can read about hosting scenarios when you can use custom ERP connections:

1. Sana Commerce Framework consists of the following subsystems:
   - Catalog
   - Customer
   - Common
   - Order
   - Price
   - Stock

   You can set up multiple ERP Web services and connect different Sana Commerce subsystems through a separate ERP Web service to handle different requests. For example, price and stock calculation can be handled by one ERP Web service, order management by the second ERP Web service, and the rest logic by the third ERP Web service.

   Each ERP Web service executes ERP business logic and all of them are connected to the same ERP database.

   As ERP is the slowest part of the whole infrastructure, such configuration can be used to improve performance of the high-traffic web stores.

2. There are some cases, when the catalog is stored in one ERP system, customers in another and orders are placed to the third ERP system, for example.

   Bear in mind that this hosting scenario is very complex. If you are going to connect Sana subsystems to different ERP systems, then products, customers, etc. should be available in all these systems with the same identifiers to synchronize data. For example, when a customer places an order in system A and product information is retrieved from system B, then a product with the same ID should be present in both systems.

   If you are interested in this hosting scenario, please contact your Sana partner or project manager first.

If you connect your webstore to one ERP system, you must set up connection only in the **Default connection** area. If you connect some subsystems of the Sana Commerce framework to different ERP systems, or to one ERP system but via multiple web services, set up the appropriate connections in the **Custom connections** area.

Maintenance mode

Sana allows to accept orders when there is no connection to your ERP system. This allows to continue business operations without interruption, even when connection to your ERP system is not available for some reasons. When there is no connection between Sana and

ERP, Sana automatically enables the maintenance mode.

For more information, see "Maintenance Mode".

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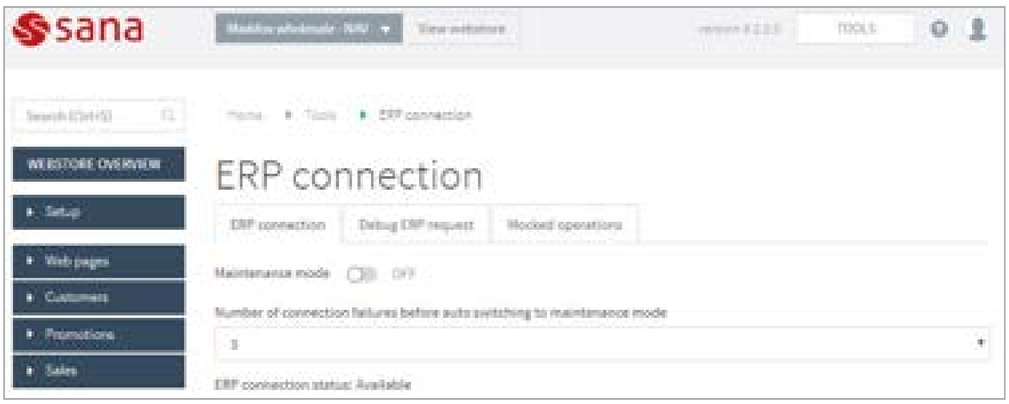
Maintenance Mode

Sana allows to accept orders when there is no connection to your ERP system. This allows to continue business operations without interruption, even when connection to your ERP system is not available for some reasons. When there is no connection between Sana and ERP, Sana automatically enables the maintenance mode.

To configure the maintenance mode, in Sana Admin click: **Tools** > **ERP connection**.



The table below provides the description of the maintenance mode settings.

Settings	Description
Maintenance mode	Use this option to enable or disable the maintenance mode manually. When it is disabled and connection to the ERP system is lost, the maintenance mode will be enabled automatically after a certain number of connection failures.
Number of connection failures before auto switching to maintenance mode	Select the number of connection failures that should happen before enabling the maintenance mode automatically.
ERP connection status	Here you can see the connection status to your ERP system. If connection is not available, click **Try to reconnect**. You can also click **Test connection** to check your connection to the ERP system. There is also the **ERP connection status check** task. It automatically checks the connection to your ERP system according to the schedule.

	For more information, see "Scheduled Tasks".

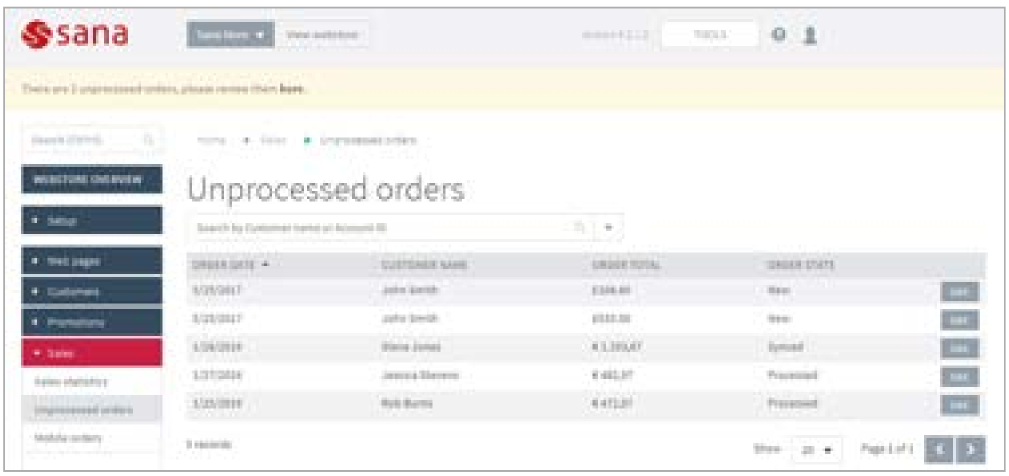
The web store can run in the maintenance mode only if all required data is synchronized with the ERP system. To synchronize data, in Sana Admin click: **Tools** > **Scheduled tasks**, and run the following tasks:

1. **General information import** - synchronizes web store settings with the ERP system and imports general information to the Sana database.
2. **Product import** - performs products indexing and imports catalog data to the Sana database.
3. **Customer import** - performs customers indexing and imports customers data to the Sana database.

For more information, see "Scheduled Tasks".

To show catalog prices in the maintenance mode, in Sana Admin click: **Setup** > **Products** > **Price**, and enable the option "**Price visibility when ERP connection is not available**". When you enable this option, you need to reindex the catalog by running the "**Product import**" task. When the web store is in the maintenance mode, customers can see only the latest indexed list prices.

Sales orders that are placed in the maintenance mode can be viewed and processed in Sana Admin: **Sales** > **Unprocessed orders**. For more information about sales orders placed in the maintenance mode, see "Unprocessed orders".



System administrator receives an e-mail, when the maintenance mode is activated/deactivated. It is sent to the administrator notifications e-mail address specified in the store information settings in Sana Admin: **Setup** > **Basics** > **Store information**.

Two e-mail templates are used to notify system administrator when the maintenance mode is activated/deactivated:

- [SHOPNAME] ERP connection not available. Maintenance mode activated.
- [SHOPNAME] ERP connection available. Maintenance mode deactivated.

For more information, see "E-mails".

There are three states of the maintenance mode:

Maintenance Mode	Description
Full	This is the default state of the maintenance mode. When there is no connection between Sana and ERP, and all required data is synchronized, a Sana web store continues to work, and customers can create orders.

ViewOnly	When there is no connection between Sana and ERP, and all required data is synchronized, a Sana web store continues to work, but with limited functionality. Customers can still browse the catalog, but they cannot create orders.
Disabled	When there is no connection between Sana and ERP, a Sana web store does not work. Users will see a page with a message that a web store is temporarily unavailable.

You can change the state of the maintenance mode in the "Web.config" file of the Sana Commerce frontend.

```
<add key="OfflineModeSupport" value="Full" />
```

When Sana works in the "**Full**" maintenance mode, customers can still create orders, but there are some features which are not available:

- Import and synchronization of any data between Sana and the ERP system is impossible in the maintenance mode, meaning that scheduled tasks will not work.
- A customer is not able to view the order history.
- Catalog prices - product prices are shown to the customers only if the option "**Price visibility when ERP connection is not available**" is enabled in Sana Admin.
  In the "**Full**" maintenance mode, the customers can see the prices based on the latest indexed list prices. The customer specific prices, trade agreements, discounts and volume prices are not available. Only simple basket calculation.
  When the order is processed in Sana Admin, the customer will receive the order payment e-mail with the recalculated sales order and the link to the page where the customer can pay the order. When the order is paid, the customer will receive one more order confirmation e-mail.
- Stock - in the maintenance mode the stock is not shown in the web store and availability of products does not depend on stock.
- Payment and shipping costs - customers will see all actual prices and will be able to pay the order, when it is processed by the web store administrator.
- Return Orders
- Optimize for large orders order processing strategy
- Quote to order conversion
- Sales document reports
- Sales document attachments
- Product attachments
- Shopping cart suggestions
- Retail offers
- A customer is not able to edit his or her profile.
- The Web service for the Sana mobile app will not work.

The features which are not available in the "**Full**" maintenance mode, are not available also when the "**ViewOnly**" maintenance mode is activated. Furthermore, customers are not able to create orders and all ordering functionality is not available. If the "**ViewOnly**" maintenance mode is enabled, customers can only browse the catalog.

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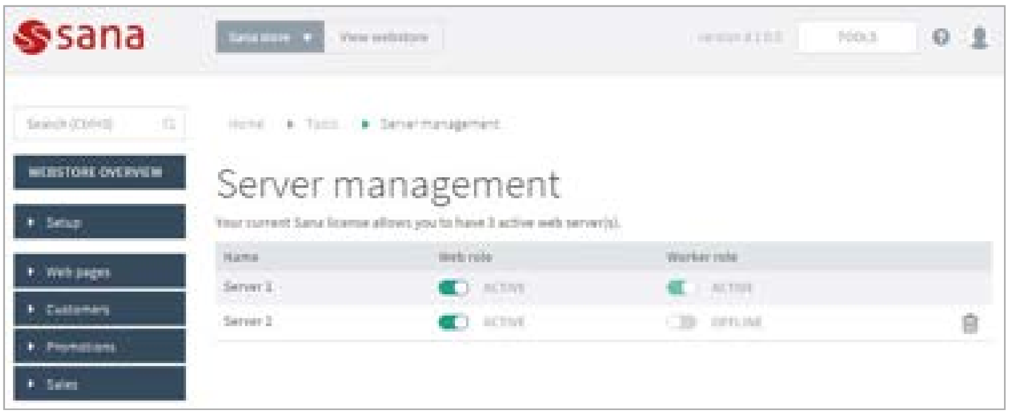
Server Management

Watch the video

Sana Commerce provides a load balanced solution for customers with a high traffic webstore that allows to install Sana on multiple servers to increase performance and reliability.

In Sana Admin click: **Tools** > **Server management**.



On the **Server management** page you can see all registered servers. You can set the role of the server (Web or Worker) and its status (Active/Inactive). Multiple servers can be active simultaneously to optimize Sana infrastructure and deliver unsurpassed performance, reliability and availability.

Scheduled tasks can run on a separate server (Worker role) than the Web server (Web role) where Sana is installed on. This allows to distribute the workload across multiple servers. For more information about tasks, see "Scheduled Tasks".

The number of servers on which Sana can be installed is specified in the Sana Commerce license.

If for some reason the server is offline, for example due to some maintenance one server is replaced by another one, system administrator can remove the offline server.

It is also possible to set up auto cleanup of the offline servers in the 'web.config' file of the Sana Commerce frontend. By default it is disabled, meaning that offline servers can be removed only manually from Sana Admin. If you set the value of the "AutoCleanupServers" parameter to "true" in the "web.config" file, any server which goes offline will be automatically removed.

See also:

Sana Commerce Hosting

Install Sana Enterprise

Network Load Balancing

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In-site Editor

Watch the video

To open **In-site editor** in Sana Admin click: **Tools** > **In-site editor**.

The In-site editor is a tool that allows to change the content of the pages, edit the custom webstore theme, navigation and any page messages directly from the webstore in the edit mode. Page messages are text items, error messages, validation messages, text of the links and buttons, titles and headers (except for the product titles and content page headers), field names, popup descriptions and titles, alt texts of the images, buttons and input fields, etc.

Any page messages, error and validation messages that are shown in the webstore can be also managed in Sana Admin, click: **Setup** > **Page elements & messages**. For more information, see "Page Elements & Messages".

Using the In-site editor there is no need to search for a specific page message in Sana Admin to change it. You can simply open the In-site editor and change the text of any page element directly in the webstore and it will be saved. You can manage the texts of the page elements per language.

From the top bar of the In-site editor you can edit the content of the current page, edit and create page messages for the current page, edit webstore theme, when any custom theme is applied to the webstore, refresh site cache to apply the content changes and close the In-site editor.

NOTE

You may not have rights to manage some content using the In-site editor. It depends on your role within the Sana Admin system. For more information, see "User Management".

To change the text of any page element hover over it and you will see the button **Create page message** . Click on this button to change the text of the page element. The images, buttons and input fields can also have alt texts that can be changed in the same way by clicking on the **Create alt text** button . If the default text of the page element has been already changed the **Edit page message** button is shown instead of **Create page message**.

NOTE

If the same page message is used in different places in the webstore it will be changed everywhere it is used.

If you changed any page message by mistake you can always revert your changes to default. When you edit the text of any page element there is a button **Revert to default**. It is active if the text has been changed.

Using In-site editor you can edit the entire webshop navigation as well as each navigation item individually. To manage webshop navigation hover over it and click **Edit navigation** or click **Edit navigation item** to edit a certain item.

In the shopping cart on the right where you can see basket details and shopping cart summary there is some demo content about payments and shipping. This is the page element with the 'CheckoutInfo_Text' text identifier. When Sana Commerce is installed use either the In-site editor or go to **Setup** > **Page elements & messages** > **All texts** in Sana Admin and change the content of the "CheckoutInfo_Text" page element. If you use the In-site editor to change this page element in the shopping cart it is marked as "Empty page message".

On the basket and checkout pages there are few more page elements marked as "Empty page message" when the In-site editor is opened. Using the In-site editor you can add any content to the basket and checkout pages to the places where the "Empty page messages" are present.

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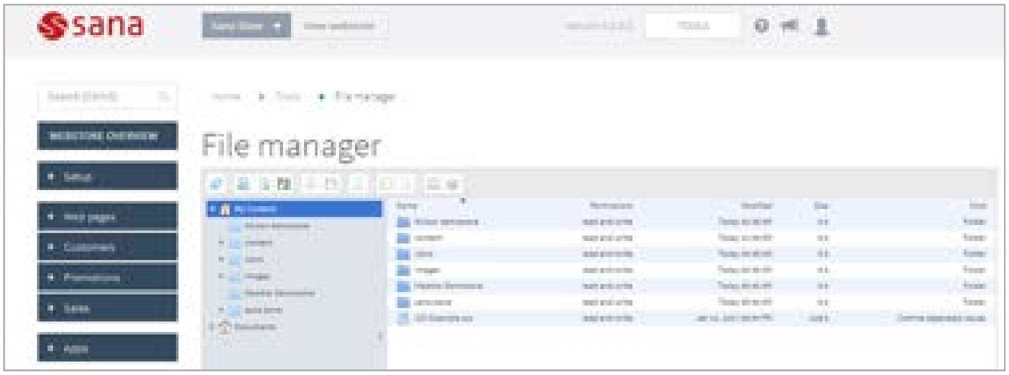
File Manager

Watch the video

To open file manager in Sana Admin click: **Tools** > **File manager**.



Use **File manager** to perform any operations with files and folders on the web server - copy, move, upload, create folders and files, rename, download and delete.

To manage the files and folders in the file manager use the toolbar and the context menu.

In Sana Admin the file manager is also used to add webstore logo and favicon, images of the menu items, shipping and payment methods. When you manage the content of any web page in Sana Admin you can also use file manager to add images to the page content or link any file.

How to change webstore icons?

All webstore icons, like shopping basket, search, icons of the buttons (arrows, delete, close, clear, etc.), warning and error icons can be easily changed using file manager.

To access all webstore icons in the **File manager** open the **icons** folder. Using **File manager** you can change any icon that is present in the webstore. To change any icon in the webstore you need to create the new icon with the same name and replace the original one in the **icons** folder.

Webstore icons requirements:

- The file name of the icon should be the same as the source one has.
- The extension of the icon image file should be the same as the source one has.
- It is recommended to create a new icon of the same size as the source one has not to break the design.

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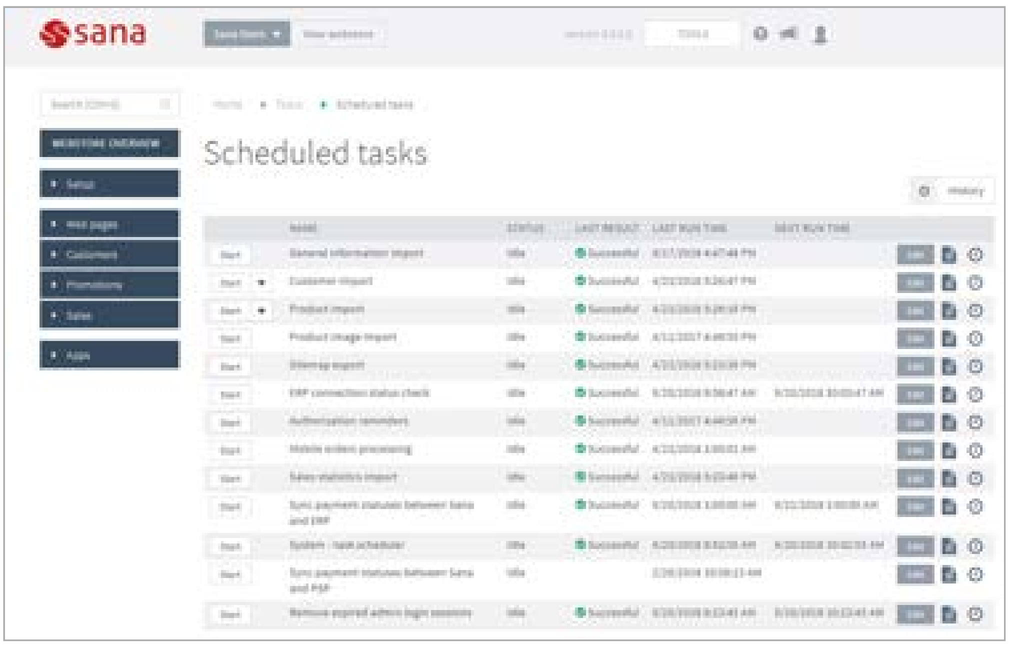
Scheduled Tasks

Watch the video

Scheduled tasks are used to perform some actions automatically at the background at a pre-defined time or after the specified time intervals. A web store administrator can also run a scheduled task manually, when it is necessary to synchronize and update some data.

To open scheduled tasks, in Sana Admin click: **Tools** > **Scheduled tasks**.



For more information about each scheduled task available in Sana, read the articles listed below:

- General information import
- Customer import
- Product import
- Product image import
- Sitemap export
- ERP connection status check
- Authorization reminders
- Mobile orders processing
- Sales statistics import
- Sync payment statuses between Sana and ERP
- System - task scheduler
- Sync payment statuses between Sana and PSP
- Remove expired admin login sessions

On the **Scheduled tasks** page, you can see the status of each task, last result, last run time and next run time.

The table below provides the description of the buttons on the **Scheduled tasks** page:

Button	Description
History	You can see the history (logs) of all tasks by clicking the **History** button at the top of the scheduled tasks list, or see the entire history of a certain task by clicking the **History** button of the related task.
Start	Start the task manually. There are two options for the **Product import** and **Customer import** tasks: • **Update index** - checks whether some products or customers information has been modified in the ERP system and synchronizes the changes with Sana. This is the default action when you click **Start**. You must update the index, when you changed some product or customer data in the ERP system. • **Rebuild index** - retrieves all products or customers from ERP. Rebuilding the index removes the previously created index and creates the new one. You must rebuild the index only when you changed some global settings which might influence all products or customers.
Edit	Set up task settings.
View log	View the last log file of the task. For example, if the task has failed, you can see the reason of failure in the last log file. If any errors occur, they will be shown in a summary at the end of the scheduled task log.

Multiple tasks can run simultaneously.

Send an e-mail to a webstore administrator when a task has failed

NOTE

Applies to: Sana 9.3.3 and higher

Sana can send an e-mail to a webstore administrator when a scheduled task has failed. There is an option in the task settings **Send e-mail to administrator when task has failed** which allows to enable and disable notifications about task failures.

In these e-mails, the webstore administrator can see the name of the task that failed, the name of the webstore, which is useful in case you have several webstores, when the task failed, and the error message. Thanks to this, the webstore administrator can quickly respond to problems with data synchronization.

All e-mails about task failures are sent to the **Administrator notifications address** set in Sana Admin at the following location: **Setup** > **Basics** > **Store information**.

For more information, see "Basics".

To send the e-mails when some scheduled tasks fail, Sana uses the e-mail template **Task Failure Notification**.

For more information, see "E-mails".

NOTE

By default, the scheduled tasks are installed within Sana, but it is also possible to install and use the Sana Commerce Task Service as a Windows service. For more information, see "Sana Commerce Task Service".

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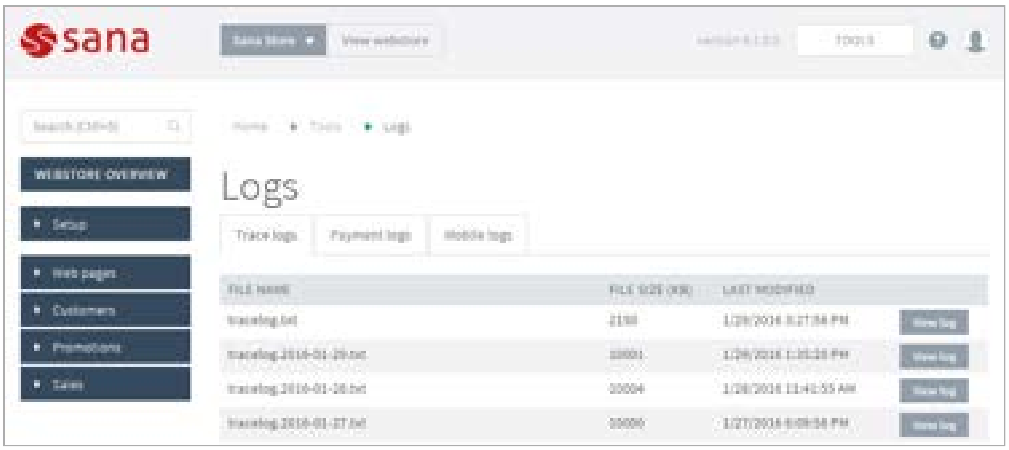
Logs

Watch the video

In Sana Admin click: **Tools** > **Logs**.

Using **Logs** in Sana Admin you can monitor the work of your web store.



General information about the web store is stored in the trace log, while all messages concerning payment processes are stored in the payment logs. Trace log file messages can be of three types: **Info**, **Warning** and **Error**. Payment logs also contain two categories of messages: **Payment** and **PaymentCritical**. By checking the Error or PaymentCritical messages you can detect what problems occurred in the web store and fix them.

If you are using Sana Mobile app, you can also use Mobile logs for troubleshooting, if there are any problems with the Sana Mobile application.

If the log file exceeds the limit of 10 Mb, all information will be moved to a separate log file, while new messages will be recorded to the main log file.

In Sana Admin on the **ERP Connection** page you can also enable logging. If it is enabled all requests from Sana Admin and web store to ERP and responses will be written into the tracelog file. By default logging is disabled as it affects performance. There are also privacy reasons why logging should only be enabled for a specific debugging reason. Log files might contain personal data from customers and order data. Therefore, we strongly recommend to use the logging functionality only if there is a specific debugging reason.

For more information, see "Sana Commerce Logging".

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Tools

Character Replacement Rules

Read this chapter to learn how to use special symbols (which are not allowed in the URLs) in the identifiers of products, customers and orders.

If you need to use any special symbols in the identifiers:

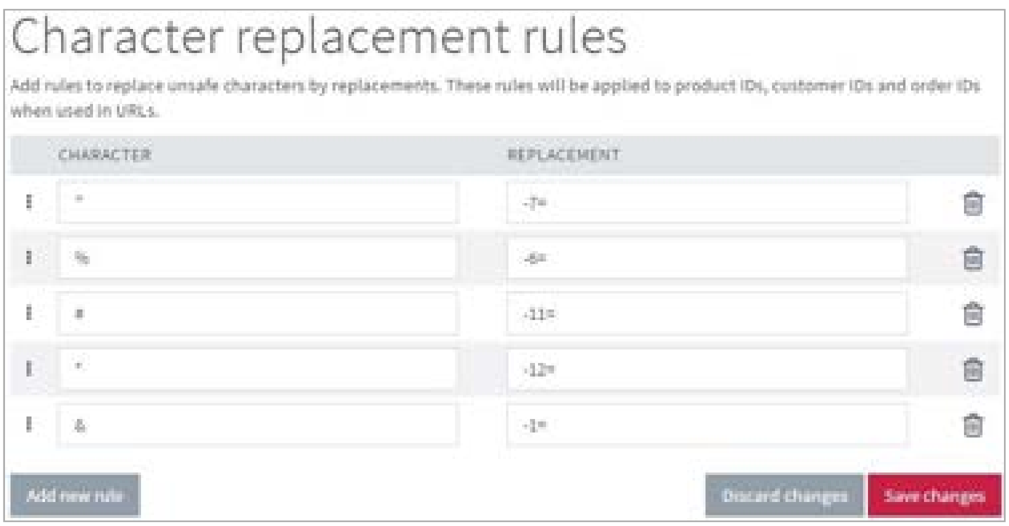
Step 1: Open Sana Admin and click: **Tools** > **Character replacement rules**.

Step 2: Here you can add rules to replace unsafe characters by substitutions.

NOTE

Make sure your replacement contains alphanumeric characters and/or the following special characters: - . ! ( )

In the **Character** column enter the unsafe symbol which must be replaced. In the **Replacement** column enter the character that will be used as a substitution for the unsafe character.



You can change the order of the character replacement rules simply by dragging and dropping them. If multiple replacements should be applied to any of the IDs the rules from the **Character replacement rules** table are checked and applied from top to bottom.

These rules will be applied to the product IDs, customer IDs and order IDs when used in the URLs.

Tools

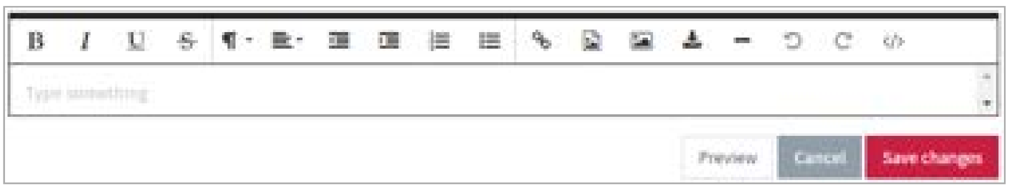
HTML Editor

NOTE

Only a user with the **System administrator** role can configure HTML editor.

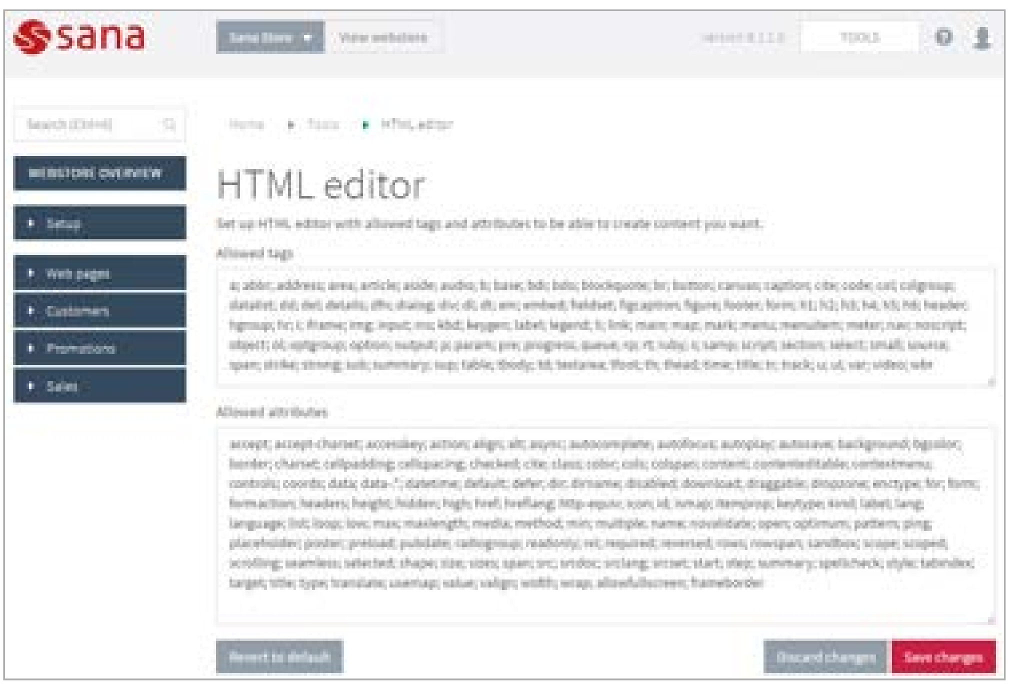
In Sana Admin click: **Tools** > **HTML editor**.

HTML editor is a content editor which allows users to create rich content for any web page of the Sana web store. Using HTML editor you can add and format the text, insert hyperlinks, images and other files.



Users who have HTML code editing experience can edit the HTML code to create any content they need.

HTML editor in Sana Admin has a predefined list of allowed tags and attributes. You can extend the list of allowed tags and attributes directly from Sana Admin to be able to create content you want and to achieve the best editing experience ever.



Tags and attributes should be separated with a ";".

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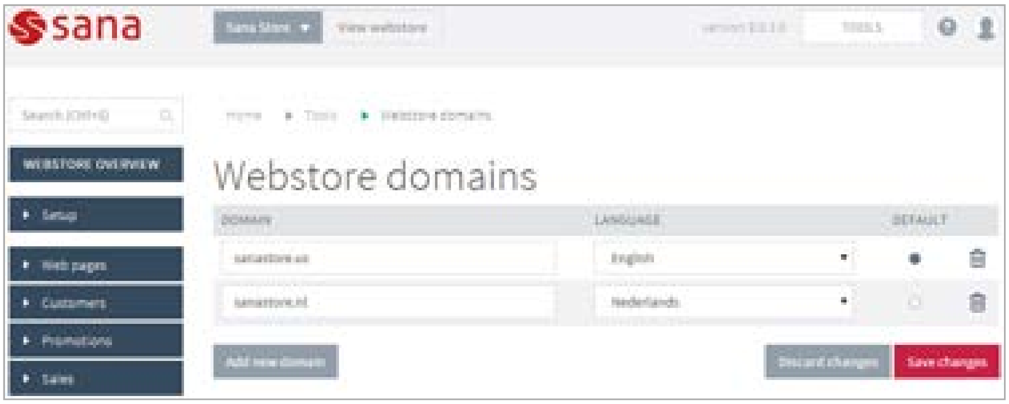
Webstore Domains

Watch the video

In Sana Admin click: **Tools** > **Webstore domains**.

On the **Webstore domains** page a system administrator can manage the webstore domain.



When you install the Sana webstore, the domain that is specified during installation is automatically available on this page. If for some reasons you need to change your webstore domain or add a new one, you can do this directly in Sana Admin and it will be automatically changed in the Sana SQL database.

If you have several webstore domains, you must select the default one. The default webstore domain is used to build canonical URLs. It is also used in certain scenarios to create a sitemap. For more information, see "Sitemap Export".

Any changes in the webstore domain(s) require a new Sana Commerce license. For more information on how to request the Sana Commerce license, see "Sana License".

If you change the webstore domain or add a new one, it should be still managed in the Internet Information Services (IIS) Manager, by setting up the site bindings.

Country-code top-level domains (ccTLDs)

A single webstore can have several country-code top-level domains. A country-code top-level domain is an Internet top-level domain generally used or reserved for a country.

Examples:

demoshop.de - for Germany

demoshop.us - for the USA

demoshop.ca - for Canada

You can use the country-code top-level domains if you are doing online business in different countries. This way one and the same webstore can be accessed from a separate country-code top-level domain and contain content in the language of that specific country.

If you reserved the country-code top-level domains for your webstore, they can be added in Sana Admin. Each domain should be assigned to the correct language. These are the languages that are installed with the language packs. For example, if you have the country-code top-level domain for the Netherlands (.nl), this domain should be assigned to the Dutch language. Do not use one and the same language for several domains.

When a user changes the language of the webstore, it automatically switches over to the country-code top-level domain of that language.

Multi-lingual webstore on a single domain

If you are not using the country-code top-level domains, you can still provide the content of your webstore in different languages. When a single domain is used for a webstore, for example the international domain (.com), the language culture name will be shown in the URLs depending on the selected language in the webstore.

NOTE

If your webstore is hosted on a single domain, do not assign any language to the webstore domain. Otherwise, webstore users will not be able to change webstore language.

Examples:
demoshop.com/**nl-nl**/ - for the Dutch language
demoshop.com/**de-de**/ - for the German language
demoshop.com/**en-us**/ - for the English language (USA)

The best approach is to use the country-code top-level domains as it shows that you are doing business in that particular country, but it is more expensive than using a single domain.

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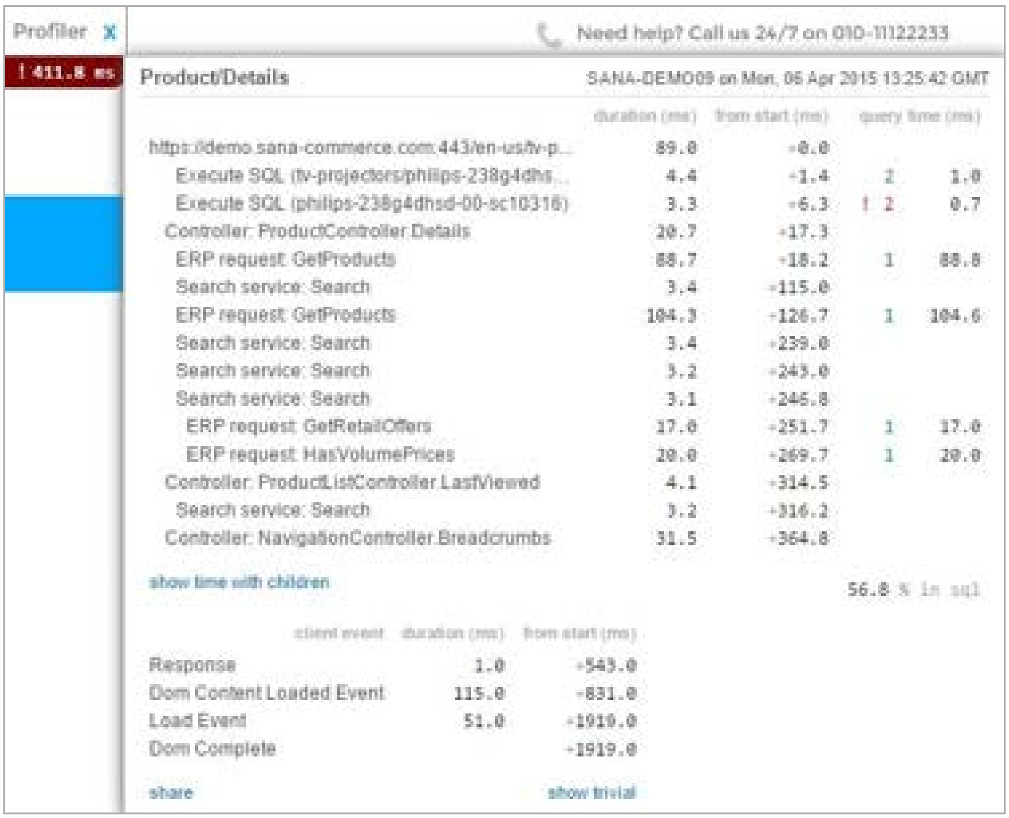
Performance Profiler

Watch the video

Sana Commerce performance profiler uses the ASP.NET mini-profiler, which is a simple, but effective tool that can be used by SDK developers to solve performance issues.

To run the performance profiler in Sana Admin click: **Tools** > **Performance profiler**. The webstore will open with a **Profiler** bar at the top left corner:



Performance Profiler

SDK developers can use the profiler to receive the following information:

- Total page load latency time: from the time the request starts till the end of request.
- Web service calls (request and response) that are executed on your ERP system.
- Queries that are executed on the SQL database.

For instance, SDK developers can use the profiler to detect areas where the same query is executed multiple times with different parameters. Such queries are highlighted, therefore SDK developers are able to find them quickly and batch.

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Integrity Check

Watch the video

Integrity check is a built-in tool which is used to check that the Sana Commerce application works properly. Using Integrity check the Sana Commerce installation and configuration are tested on different aspects: functionality, security, availability, connectivity.

In case of a multi-store solution each webstore is tested separately.

To check your Sana Commerce solution in Sana Admin click: **Tools** > **Integrity check** > **Run integrity check**.

It is recommended to run integrity check right after the Sana Commerce solution has been installed and connected to your ERP system.

Integrity check tests your webstore and server settings. It covers two areas of tests:

- **Functional**: check the Sana Commerce webstore domains and providers (whether the connection between ERP and Web server is secure), configuration of the payment providers and methods, Web server encryption settings, logging configuration and SMTP settings.
- **Best practice**: check the Sana Commerce webstore information and security settings and hosting.

When Integrity check has finished testing of the Sana Commerce application and Web server configuration, you can see the total number of the performed checks, how many checks are completed successfully, with warnings and failed.

You can expand the **Webstore** and **Server** areas to see the status of each individual check, its description and recommendations if there are any. Each test is marked with an icon which shows whether a test is finished successfully, with a warning or failed.

Below you can also see the list of recommendations for further checking of the Sana Commerce application which can be performed only manually:

- Check whether the connection to your ERP is configured and available (**Tools** > **ERP connection**).
  For more information, see "ERP Connection".
- Check whether the server is active (**Tools** > **Server management**).
  For more information, see "Server Management".
- Check whether the webstore domain is correct (**Tools** > **Webstore domains**).
  For more information, see "Webstore Domains".
- Check whether you can view the log files of the scheduled tasks (**Tools** > **Scheduled tasks**).
  For more information, see "Scheduled Tasks".
- Check whether you can manage the files in the File manager (**Tools** > **File manager**).
  For more information, see "File Manager".
- Check whether the webstore languages are configured as required (**Setup** > **Basics** > **Languages**).
  For more information, see "Basics".

- Check whether the product images of all sizes are shown in the webstore and on the product pages in Sana Admin.

  For more information, see "Product Images".
- Check whether you have changed the demo content of the basket details and shopping cart summary.

  For more information, see the last paragraph of the "In-site Editor" chapter.
- Check whether the webstore is configured in your ERP system.

  How to configure the webstore in the ERP system can be found in the installation manual of the Sana Commerce add-on on top of the ERP environment.

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Refresh Site Cache & ERP Data

Refresh Site Cache and **Refresh ERP Data** are used to clear the cache. The site cache (webstore content, design) and data from the ERP system (product details, prices and stock) are separated. This allows to clear the cache only for the part where you make changes.

If you have a multi-store solution, the cache is cleared per webstore.

Caching is applied to all webstore pages in order to achieve a better performance. Also specific pages are cached, for example a product page with customer specific prices. By default the duration of this cache is 15 minutes; after 15 minutes it expires automatically.

The advantage of caching is that the cache is retrieved from the Web server memory. The data retrieval on the Web server memory is faster compared to a database or ERP.

In the table below you can see for how long the webstore cache is valid per module. Caching is applied to achieve better webstore performance. These are the default values and can be adjusted by your implementation partner. Keep in mind that performance of your application will drop when the duration is set less. This is because the amount of calls to your ERP system will increase, which is much slower then retrieving the cache.

Module	Duration in minutes
Product details	20
Product bulk	20
Product search	20
Site menu	60
Basket	60
Order history	20
Content	60

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Mobile

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Introduction

Watch the video

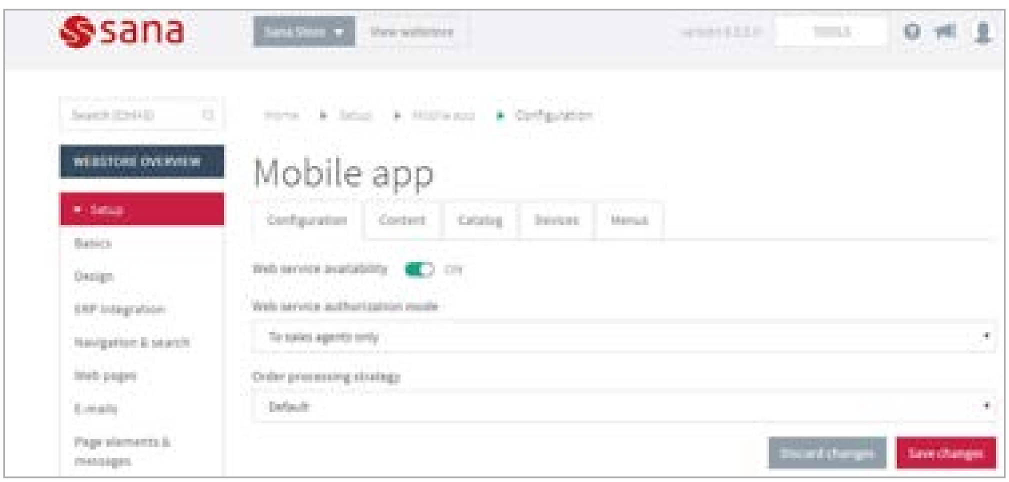
NOTE

We stopped developing and selling the Sana mobile application. It was replaced by the responsive design of the Sana web store. There will be no new versions of the Sana mobile app. Our current customers can continue using the mobile app.

Since we still have customers who use the mobile app, we didn't remove the settings used to set up the app in Sana Admin. Starting from **Sana 9.3.2**, those customers who do not have the Sana mobile app (it is not included into the Sana license) will not see the menu items and settings used for the mobile app in Sana Admin.

In Sana Admin you can manage the content of the Sana Mobile app.

To configure the Sana Mobile app and manage its content in Sana Admin click: **Setup** > **Mobile app**.



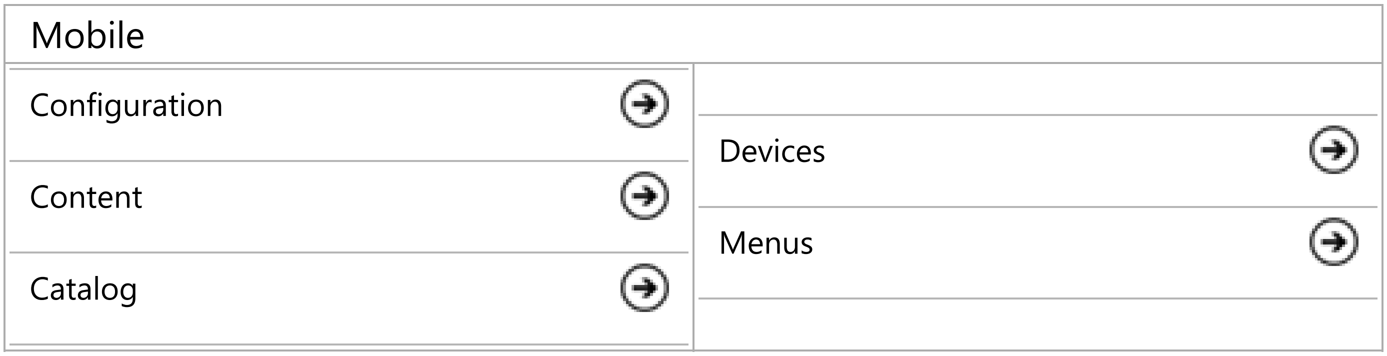
The following content of the Sana Mobile app can be managed in Sana Admin:

- Welcome message
- Home page banner
- Disclaimer information
- Product descriptions
- Product images
- Menus
- Product lists

- Content of the "About" page of the Sana Mobile app

In Sana Admin you can also enable/disable the Web service and configure it in different modes to be used by the application. An overview of the registered mobile devices can be also seen.

For information about Sana Mobile app see "Sana Mobile App".



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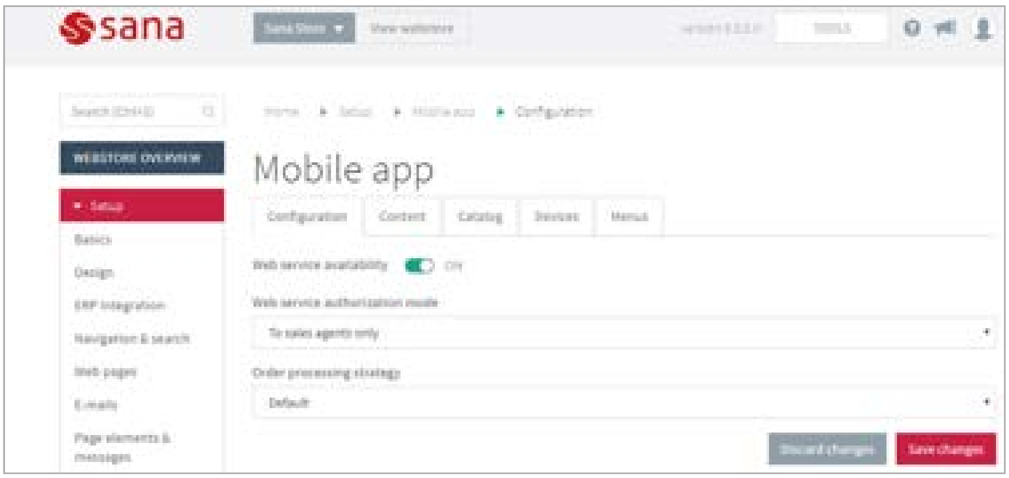
Configuration

To configure Web service in Sana Admin click: **Setup** > **Mobile app** > **Configuration**.



The table below provides the description of the Web service settings:

Settings	Description
Web service availability	This setting is used to enable/disable the Web service.
Web service authorization mode	This setting is used to set the Web service authorization mode for the Sana mobile application. Only the users of a certain type specified in this dropdown can be authorized. **Available modes**: • To all customers and sales agents • To B2B customers only • To sales agents only • To B2B customers and sales agents only
Order processing strategy	There are two order processing strategies for Sana mobile app: • **Default** - This strategy is used for real-time order processing, meaning that all prices are calculated in real-time and the orders are sent directly to the ERP system if there is Internet connection. If there is no Internet connection all orders are stored locally on your device and can be sent to the ERP system when connection is re-established.

	• **Optimize for fast ordering** - This order processing strategy can be called 'near real-time' as it has an intermediate step (storage) before the orders are sent to the ERP system. When the order is placed from the Sana mobile app at first it is sent to the Sana SQL database. Such orders can be seen by the mobile manager in Sana Admin, checked and sent to the ERP system. At this point the prices are recalculated and the orders are set to the "synced" state. If there are some problems with the order the mobile manager will see the message with the description of what is wrong with the order directly on the order details page in Sana Admin. This order processing strategy might be useful if you have unstable Internet connection and you have problems with sending the orders directly to the ERP system or you need to quickly place a lot of orders, which you can easily send all at once to the ERP system from Sana Admin anytime. For more information on how to manage such order, see "Mobile Orders". If you change order processing strategy you should run synchronization of settings from the Sana mobile app to apply the changes.

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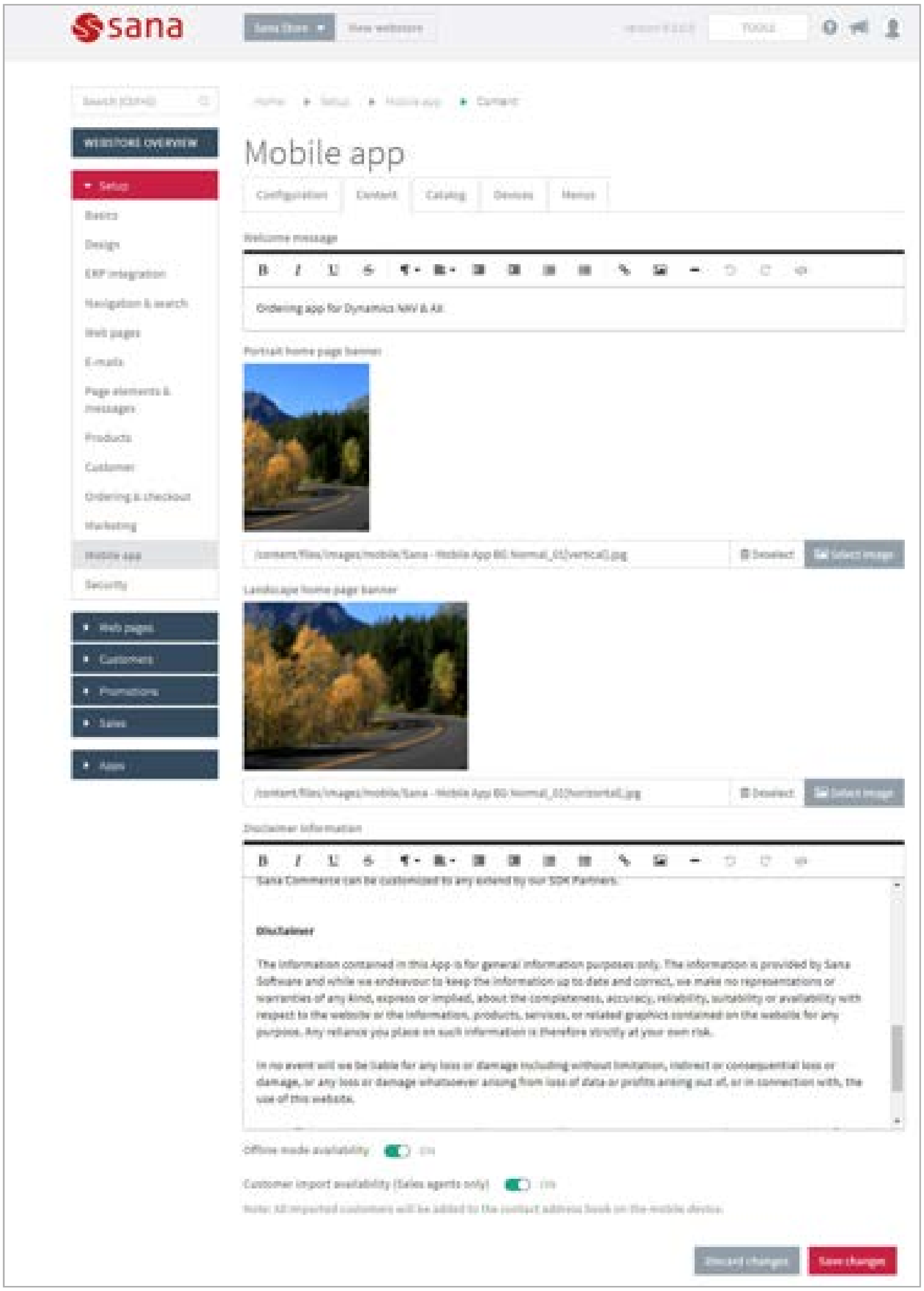
Content

Watch the video

To manage content of the Sana Mobile app in Sana Admin click: **Setup** > **Mobile app** > **Content**.



On the **Content** tab, you can configure the home page of the mobile application, specify the welcome message and disclaimer information, enable/disable offline mode and import all customers related to sales agents.

The table below provides the description of the content settings:

Setting	Description
Welcome message	This text box is used to add any message which will be shown when the Sana Mobile application starts up.
Home page banner	This is an image which is shown when the Sana Mobile app starts up. Depending on the page orientation two images for the home page banner can be set, one for the portrait orientation and another for the landscape.
Disclaimer information	This text box is used to specify the disclaimer information. Disclaimer information is a way of stating the terms under which the users access the application and use the information explaining your obligations and theirs.
Offline mode availability	This setting is used to allow the mobile application to run in offline mode. Thus the application can run without persistent Internet connection, behaving just like a locally installed native application. In offline mode the orders still can be handled after which they will be synchronized once online.
Customer import availability (Sales agents only)	This setting is used to import all customers related to the sales agents. After the customers are imported they will be available in the contact address book on the mobile device.

Banner image size for iPad:

	iPad 1 and 2		**iPad 3 and 4**	
	Width	**Height**	**Width**	**Height**
Portrait image	768 px	1024 px	1536 px	2048 px
Landscape image	1024 px	768 px	2048 px	1536 px

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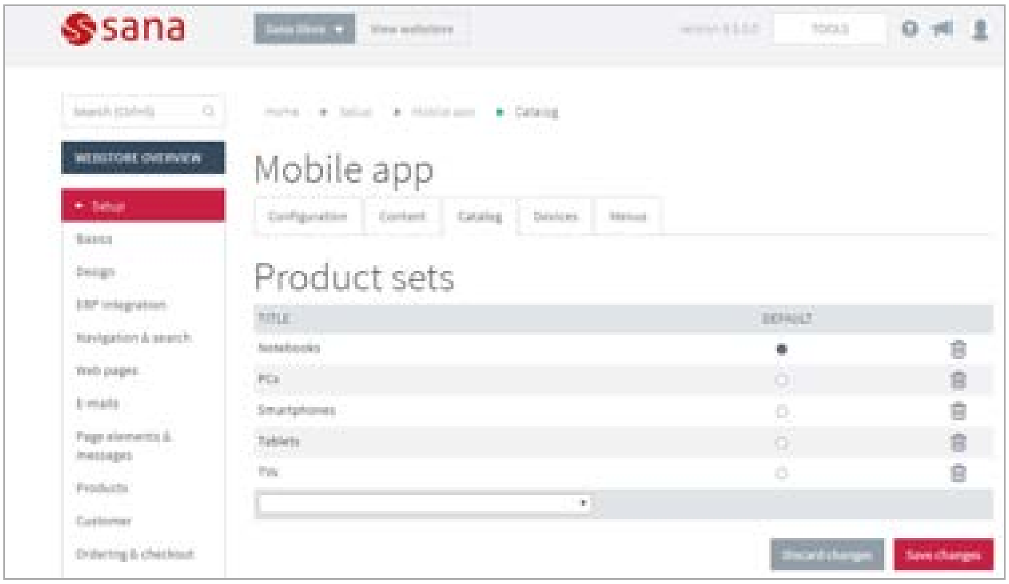
Catalog

Watch the video

To create the products catalog for the Sana Mobile app in Sana Admin click: **Setup** > **Mobile app** > **Catalog**.



On the **Catalog** tab, you can select the product sets that will be shown in the quick order of the Sana Mobile app. In the **Title** dropdown you can see the list of all product sets that are created in Sana Admin at the following location: **Setup** > **Product settings** > **Product sets**.

In the catalog settings of the Sana Mobile app you can also set the default product set for a quick order.

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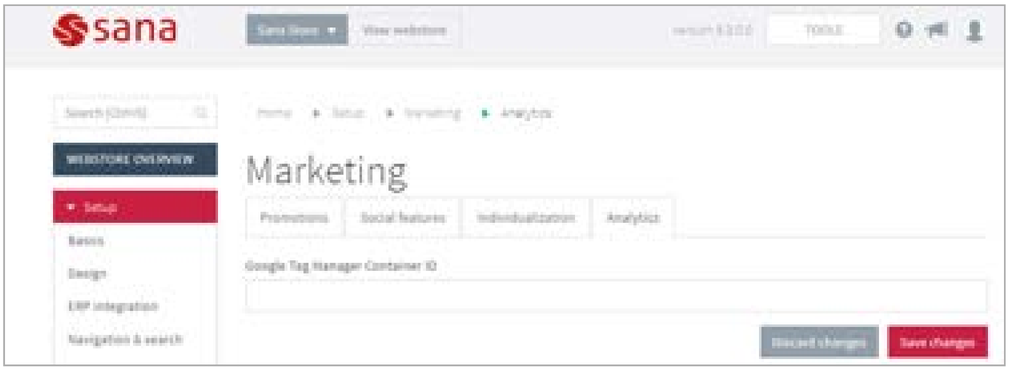
Devices

Watch the video

To see all registered devices of the Sana Mobile app in Sana Admin click: **Setup** > **Mobile app** > **Devices**.



The Sana Mobile app is available only for iPad.

On the **Devices** tab, you can view a list of all registered device IDs and their names. The amount of registered devices cannot be more than the amount set in the license file. Device registrations can be deleted from this page, to allow new devices to connect without exceeding the amount of registered devices specified in the license file.

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Menus

To create a menu for the Sana Mobile app in Sana Admin click: **Setup** > **Mobile app** > **Menus**.

On the **Menus** tab, you can create menu items and link product sets to the menu items.

The table below provides the description of the menus fields/settings:

Tab	Fields/Settings	Description
Basics	**Title**	Enter the menu item title. It is shown in the Sana Mobile app.
Basics	**Product set**	Add an existing product set to the menu item or create a new one. To add an existing product set you can search it by title. If you create a new product set it will be empty and automatically linked to the menu item. Later on you can configure the newly created product set.
Advanced	**Image visibility**	Set visibility of a menu item. Enable **Item visibility** to make the menu item visible in the Sana Mobile app or disable to hide it.
Advanced	**Image**	Add an image to the menu item. The image is shown in the menu item of the Sana Mobile app.

Menu item image size for iPad:

	Width	Height
Menu item image size	100 px	100 px

You can change the order in which you want menu items to be shown in the Sana Mobile app by dragging and dropping them into the order you want. You can also change the levels of menu items, either make it as a parent item or as a child menu item to the one of the higher level.

From the menu items list you can edited or deleted any menu item. Hover over the menu item to see the **Edit** and **Delete** buttons.

Translate a menu item

You can translate any existing menu item into any available language. Hover over the menu item that you want to translate and click **Edit**. From the language dropdown select the language you want to translate the menu item to. When the language is selected the menu item page is presented in two columns. The first column holds the menu item content in the default language (English) and it is not editable, while in the second column you can provide translation to the menu item title. For the translated menu item you can also redefine menu item visibility and image. If you leave the **Image** field empty for the translated menu item, the image from the source menu item will be used.

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Sana Mobile App

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Introduction

Watch the video

NOTE

We stopped developing and selling the Sana mobile application. It was replaced by the responsive design of the Sana web store. There will be no new versions of the Sana mobile app. Our current customers can continue using the mobile app.

NOTE

Checking the usage statistics of the Sana Mobile app we noticed that almost all Sana Mobile users are using iPad. Based on this we decided to not further invest in Android and iPhone support. As a result, the Sana Mobile app is now available only for iPad.

Sana Commerce Mobile app allows sales agents to take orders without consistent internet connection. The app works entirely in offline mode and supports different languages. The internet connection is only required to synchronize all data, like products catalog, navigation, customers and orders with your ERP system. During synchronization the products catalog, products sets, navigation and customers are downloaded and stored locally on your device, while the locally stored orders are sent to your ERP system.

Sana Mobile app is available only for iPad and can be installed from the Apple App Store.

The app combines 'classic' catalog browsing and ordering with the possibility of quick ordering through the basket and barcode scanning.

Sales agents can represent customers that allows to place orders on behalf of their customers and check their order history and status.

Sana Commerce Mobile app supports shipping methods and sales taxes during order taking. Sales taxes are calculated based on the selected shipping address of the represented customer.

Inventory, customer specific assortments and prices are also available and even more - can be downloaded locally on your device for up to 10 customers using the **Prepare your trip** option. This way the customer assortments and price rules are applied for these customers even when your device is not connected to the internet.

Product specifications using product attributes and units of measure can be shown for the products catalog.

Sales agents can create prospects as well as quotes can be created for prospects. Pending orders and order history can be accessed from within the app.

Products catalog can be presented in two different modes: gallery mode and list mode. The products can be sorted, for example by ID, title and price. Product variants as well as prepacks are supported.

Sales agents can reorder the previously purchased products, print order confirmation and send it by e-mail in the PDF format.

Sana Admin is extended with the options that allow to manage the content of the Sana Commerce Mobile app. For information about how to manage the content of the mobile application in Sana Admin, see "Mobile".

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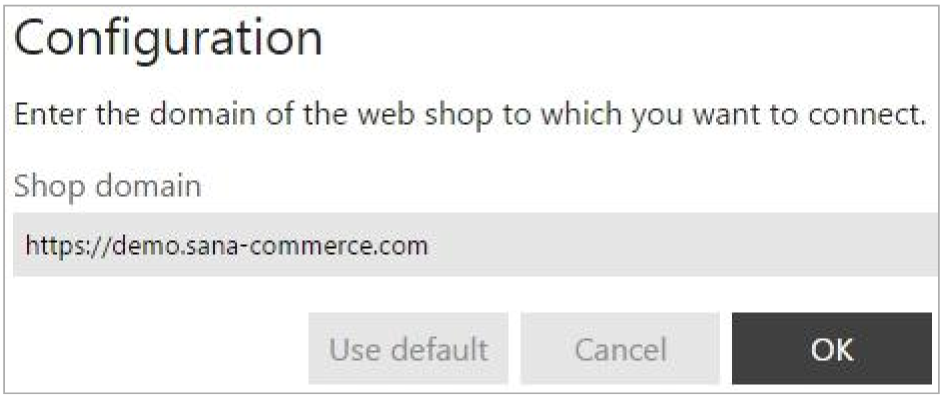
Configuration

Watch the video

When you launch the Sana Mobile app on your device, you will see the **Configuration** button on the splash screen ().

Tap the **Configuration** button to open the window where you can enter the domain of the webshop to which you want to connect:



NOTE

Because Apple will require HTTPS connection for iOS apps by the end of 2016, connection to your web shop the Sana Mobile app connects to should be secure. If you use the Sana Mobile app, it is required to configure secure data exchange for the web shop. Therefore, enter web shop domain with the HTTPS protocol at the beginning. Example: https://demo.sana-commerce.com/. For more information about how to set up secure connection for your web shop, see "HTTPS".

The Sana Web service should also work over HTTPS. For more information, see the last step of the Sana mobile app installation manual.

When you launch the Sana Mobile app for the first time, the default domain is used which connects the app to the Sana Commerce demo environment. Thus in the **Shop domain** field, enter the domain of your webshop to which you want to connect. When the webshop domain is entered, the app will be downloaded and all data is synchronized. Every next launch of the app it will connect to the entered webshop domain and all data will be automatically synchronized if the internet connection is available. Anytime you can change the webshop domain when you launch the app or use the default one which connects to the Sana demo shop.

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Dashboard

Watch the video

Dashboard of the Sana Mobile app is the main menu which gives access to the primary information, like products catalog, orders, customers, data synchronization:

Dashboard

The application bar on the left provides users quick access to the dashboard as well as to all application options.

The dashboard of the Sana Mobile app gives quick access to the following options:

Option	Description
New order	Allows to create an order from a single page (basket). An order can be created only when a customer is represented by the sales agent. Thus, when you tap **New order** and the customer is not represented you will be prompted to represent the customer first. To create an order you can either enter an item number, title or barcode in a search field to find a product and add it to the basket or you can turn on the scan mode and use the barcode scanner. By scanning the barcodes of the products in the **Scan mode,** the products will be automatically added to the basket.
View catalog	Allows to view the products catalog.
Order info	Allows to see the orders history and information. The orders are shown per represented customer.
Prepare your trip	Allows to store customer specific assortments and prices locally on your device for up to 10 customers. When you select the customers and tap **Prepare your trip** customer specific assortments and prices for the selected customers

	will be synchronized and downloaded locally on your device and applied even when your device is not connected to the internet. This can be useful when you go to your customers where problems with internet connection may be. Thus, you can select up to 10 customers and download locally customer specific assortments and prices beforehand. The list of customers can be sorted by customer's name and number. On the dashboard the **Prepare your trip** tile shows the amount of customers for whom the data is synchronized.
Customer info	Allows to see the list of all assigned to the sales agent customers and their information, like names and addresses. The list of customers can be sorted by customer's name and number. If the icon in the **Sync state column** is of a green color, this means that for this customer assortments and price rules are stored locally on the device using the **Prepare your trip** option and will be applied even if your device is not connected to the internet. Tap the customer to see the detailed information. On the **Customer info page** of the selected customer the last 5 pending orders and orders from order history of the customer are shown. If there are more than 5 orders, you can click **More orders** to open the **Order info** page with full order history of a customer.
Sync data	Allows to synchronize data with your ERP system if your device is connected to the internet: products catalog, navigation, customers, customer specific assortments and prices, orders and prospects. All data as well as orders are automatically synchronized when you launch the application. When you open the **Sync data** page from the dashboard or application bar, you can choose what data should be synchronized: • Download Settings • Download Customer Data • Download Catalog Data • Upload Order Data You can also see the summary of the synchronized data. On the dashboard, the **Sync data** tile shows the amount of local orders that are not synchronized yet.

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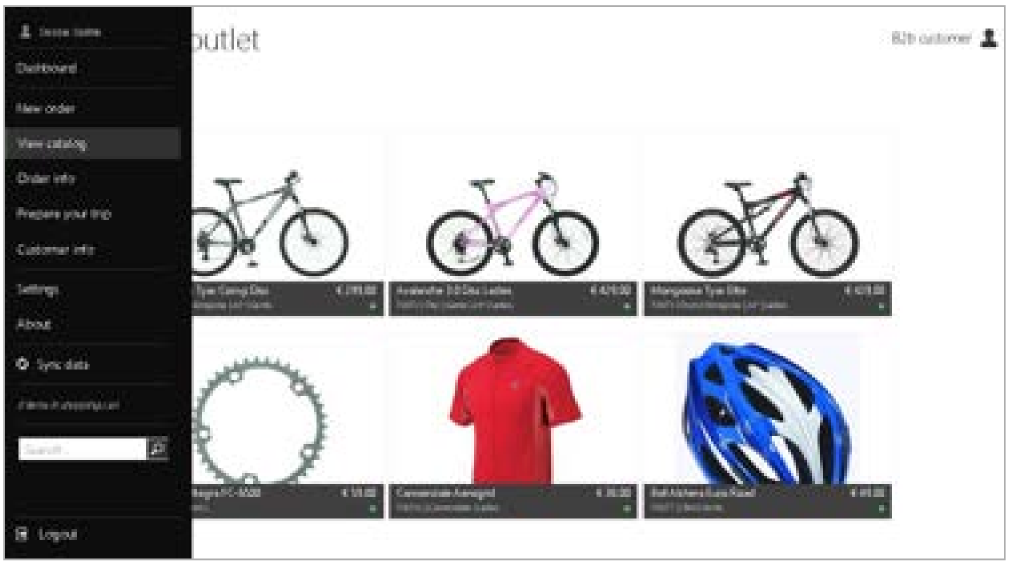
Application Bar

Watch the video

Application bar on the left provides quick access to the dashboard as well as all options and settings of the Sana Mobile app. From the application bar you can also open the shopping cart, use search and log out. At the top of the application bar the name of the logged in sales agent is shown:



Application Bar

For more information about the dashboard options which are also available on the application bar (New order, View catalog, Order info, Prepare your trip, Customer info and Sync data), see "Dashboard".

The table below provides the description of the application bar menu items that are not available on the dashboard:

Menu item	Description
Settings	Contains the general settings of the Sana Mobile app, like price and stock presentation, rich media download, catalog presentation and logging. For more information about Sana Mobile settings, see "Settings".
About	Contains information about the webshop to which the app is connected. The content of the **About** page can be created in Sana Admin: **Setup** > **Mobile app** > **Content** > **Disclaimer information**. For more information about how to fill in with content the **About** page in Sana Admin, see "Content".
Shopping cart	Allows to open the basket, see and edit its contents and make orders directly from it in the browse catalog mode, using the search field or scan mode, using the barcode scanner. For more information, see "Basket".

Search	Allows to search for the products by title or item number. The fields which the sales agent can search on should be added to the search index in Sana Admin search settings. For more information about configuration of search settings in Sana Admin, see "Search".
Logout	Allows the sales agent to log out. Before you log out make sure that all sales orders and prospects are synchronized with the ERP system. When you log out all sales orders and prospects that are not synchronized will be lost.

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App Settings

Watch the video

The **Settings** navigation item on the application bar is used to access and configure the general settings of the Sana Commerce Mobile app and see the app's log. The Sana Mobile app settings control the behavior of the app:

Settings

The table below provides the description of the Sana Mobile app settings:

Setting	Description
Show price	This setting is used for presentation purposes only and allows to show or hide product prices.
Show stock	This setting is used for presentation purposes only and allows to show or hide stock indicators.
Download rich media	This setting is used to download product images locally on your device to be able to view them if your device is not connected to the internet. By default this setting is set to **OFF**. This means that by default product images are not downloaded locally to your device during data synchronization. If your device is connected to the internet the product images are shown in any case. To see product images when your device is not connected to the internet you should set the setting **Download rich media** to **ON** and synchronize your data while your device is online to download product images. When product images are downloaded locally on your device they will be shown even if your device is not connected to the internet.
Run sync on startup	This setting is used to enable/disable the automatic data synchronization on app startup. By default this setting is disabled. But when there is no local data for the app, synchronization will start when you launch the app in any case if there is Internet connection, even if the **Run sync on startup** setting is set to **OFF**. When synchronization is in progress, you can continue working with the application without interruption as it can run in the background.
Basket price settings	Three different approaches on how the basket can be calculated are available:

	• **Show prices after recalculation** - The prices are shown in the basket only when you tap **Recalculate**. These are actual prices coming from your ERP system in real-time if there is Internet connection. • **Show synced pricing** - If this option is selected those prices that have been imported during synchronization will be shown in the basket. Customer specific prices and prices including/excluding VAT are also used. You can also tap **Recalculate** if there is connection to the Internet, in this case you will see the actual prices retrieved from the ERP system. • **Show real-time pricing** - This option is used to show the actual prices from the ERP system if there is connection to the Internet. When you add a product to the basket from the product details page, prices will be calculated and shown in the basket automatically. If you add a product directly from the basket using the search field or scan mode, prices will be shown only when you tap **Recalculate**.
Catalog presentation	**Gallery mode**: The products catalog is presented by product categories as navigation items each holding products arranged in columns. The products can be sorted by IDs, titles and prices. **List mode**: The whole products catalog is presented in a list mode. You can switch between product categories using the dropdown at the top of the product list page. The products can be sorted by IDs, titles and prices. Unlike the gallery mode, in the list mode you can show or hide product images. For more information, see "Catalog".
Language	Allows to change the language of the application. The language of the app is automatically detected from your device. The following languages are available: Danish, German, English (Great Britain), English (United States), Spanish, French, Italian, Dutch, Finnish, Russian and Ukrainian. If you change the language you should synchronize your data to download product translations in the language you have selected.
Background catalog sync	Using this option you can configure a scheduled task to automatically run catalog synchronization according to schedule. You can set up synchronization interval to: • 10 minutes • 30 minutes • 1 hour
Log	Allows to view the app's log, where you can see the messages which can be used for troubleshooting if any problems occurred.
Clear cache	The cache contains the products catalog, customers, customer prices and assortments. If you clear the cache no products can be viewed and ordered until you synchronize all data again. The list of customers will be also removed. Credentials to automatically log you in, order templates and locally stored orders will not be removed.
Export customers	This setting can be used to export the customers to your contact list on your device. You can update your contacts by running the export again - in this case the imported contacts will be overwritten.

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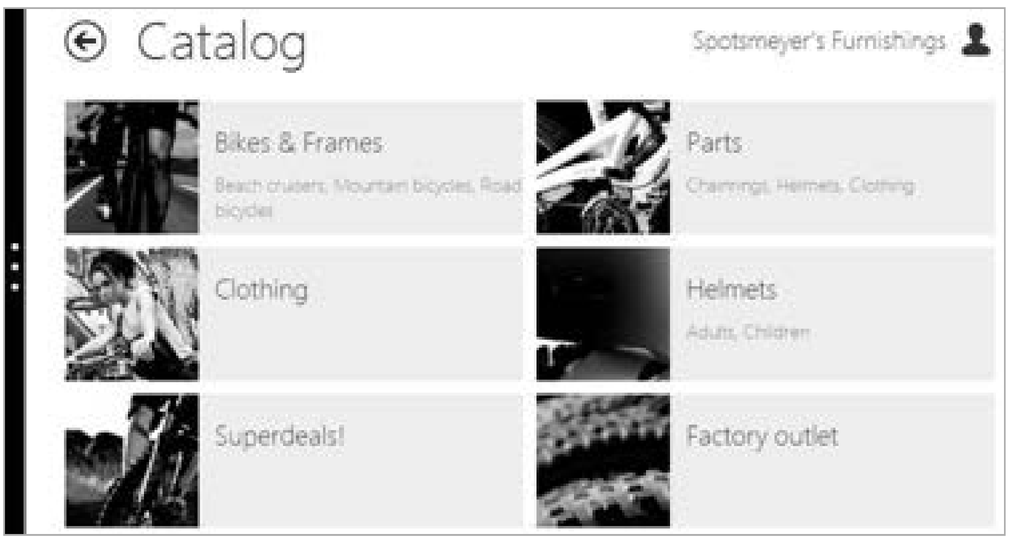
Catalog

Watch the video

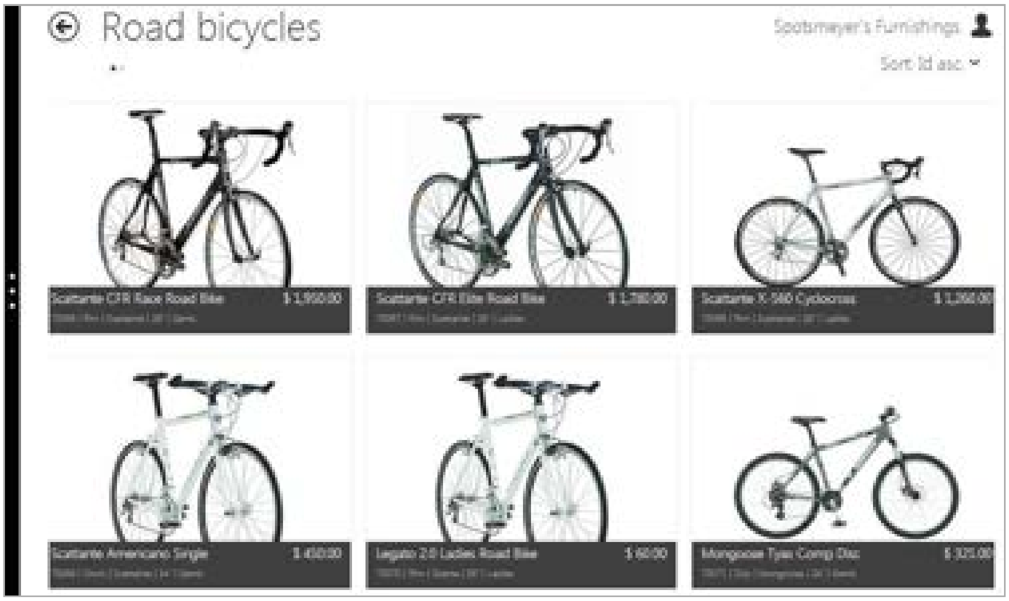
Products catalog for the Sana Mobile app can be created in Sana Admin: **Setup** > **Mobile app** > **Catalog**. To be able to browse a catalog in the Sana Mobile app at first you should create product sets and then app's navigation in Sana Admin. For more information on how to manage the content of the Sana Mobile app in Sana Admin, see "Mobile".

Catalog can be presented in two different modes, either gallery mode or list mode. Catalog presentation can be changed under the app's settings on the application bar. For the catalog presentation in the list mode you can also enable/disable product images under the app's settings.

Gallery mode: The products catalog is presented by product categories as navigation items each holding products arranged in columns. The products can be sorted by IDs, titles and prices.

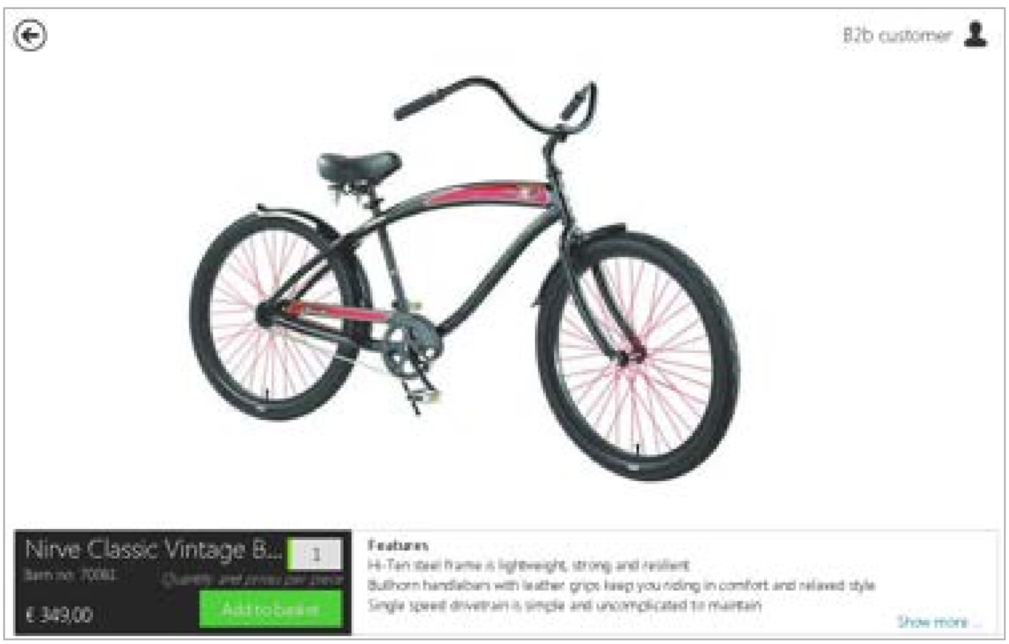


Product Categories in Gallery Mode



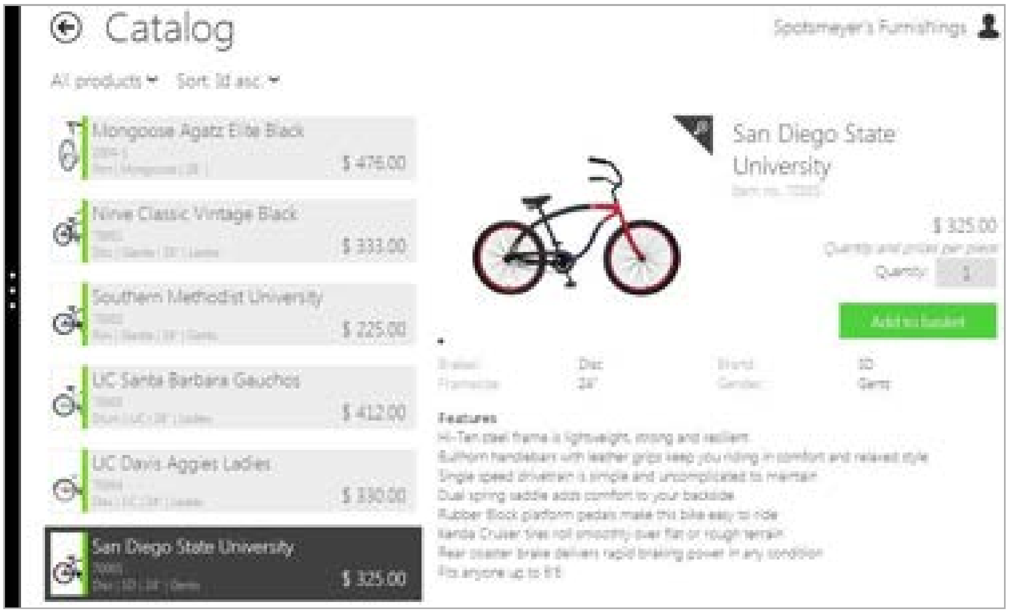
Products in Gallery Mode with Sorting Dropdown at the Top

When you browse the catalog in the gallery mode you can swipe to see more products. Up to 50 pages with products can be shown under a single category.



Gallery Mode: Product Details Page

List mode: The whole products catalog is presented in a list mode. You can switch between product categories using the dropdown at the top of the product list page. The products can be sorted by IDs, titles and prices. Unlike the gallery mode, in the list mode you can show or hide product images:

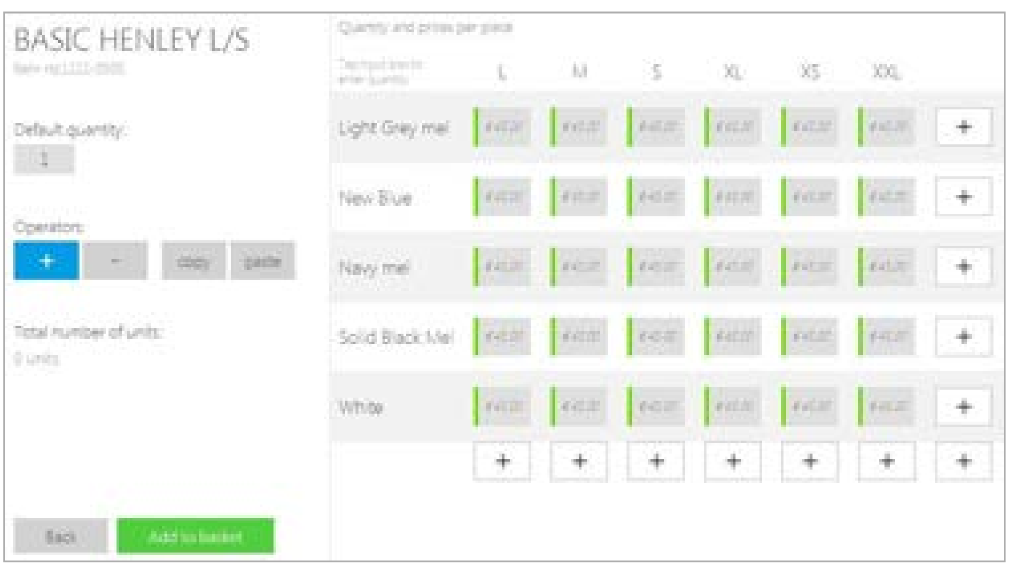


Product List Mode with the Opened Product

Using product attributes in Sana Admin catalog settings you can add different product specifications, for example brand, which will be retrieved from your ERP system and shown on the products overview and product details pages. For more information, see "Product Specifications".

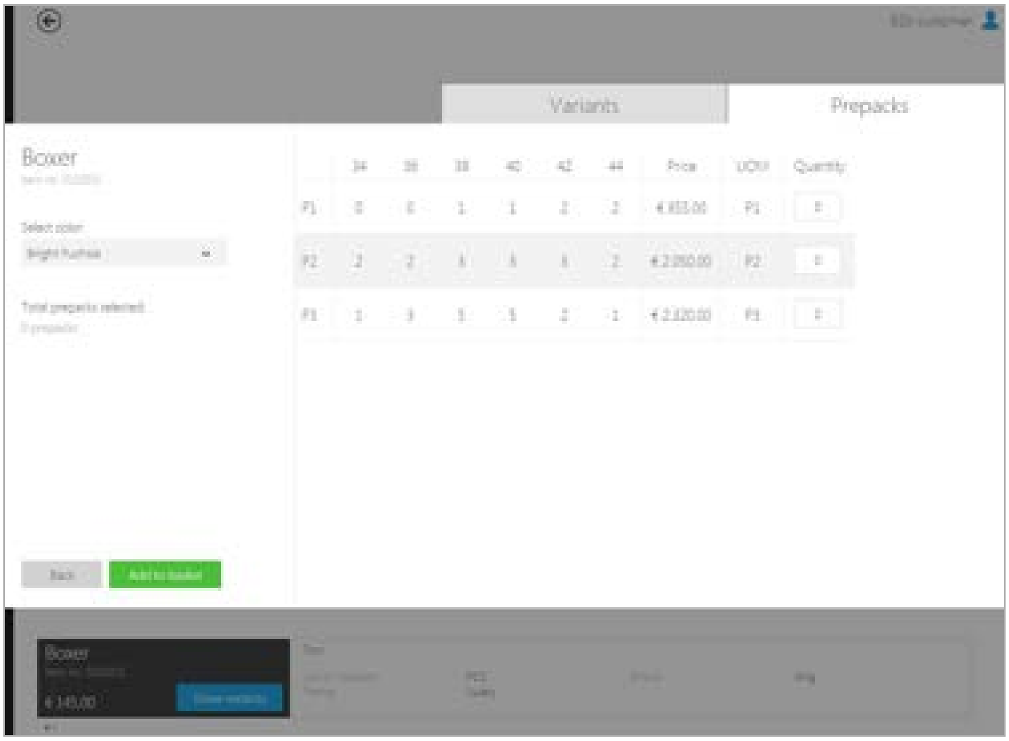
Units of measure (UOM) can be also enabled/disabled and set for the products catalog. If units of measure are enabled and set for the products in your ERP system, then quantity and prices of the products will be shown per configured unit of measure. For more information about UOM configuration, see "Units of Measure".

Product variants are shown in matrix where you can tap the input box to enter quantity. You can also set the quantity which should be used by default. A sales agent is also able to copy and paste quantities in matrix using operators. It is possible to copy the value from a single box and paste it into another one, copy all values from a matrix row and paste these values into another row and also copy all values from a matrix column and paste these values into another column:



Product Variants Matrix

The prepacks from Microsoft Dynamics NAV are also supported. They are shown on a separate tab:



Prepacks

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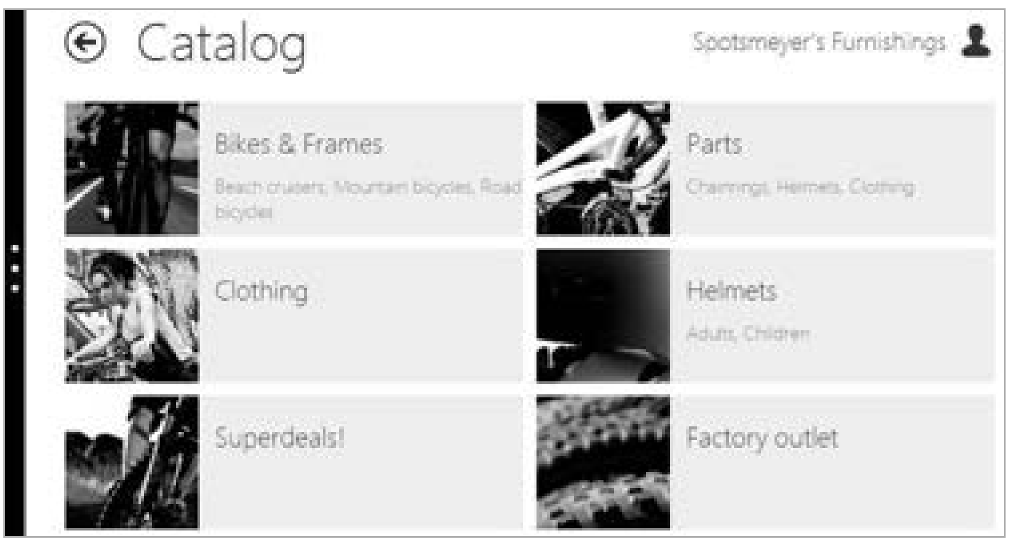
Catalog

Watch the video

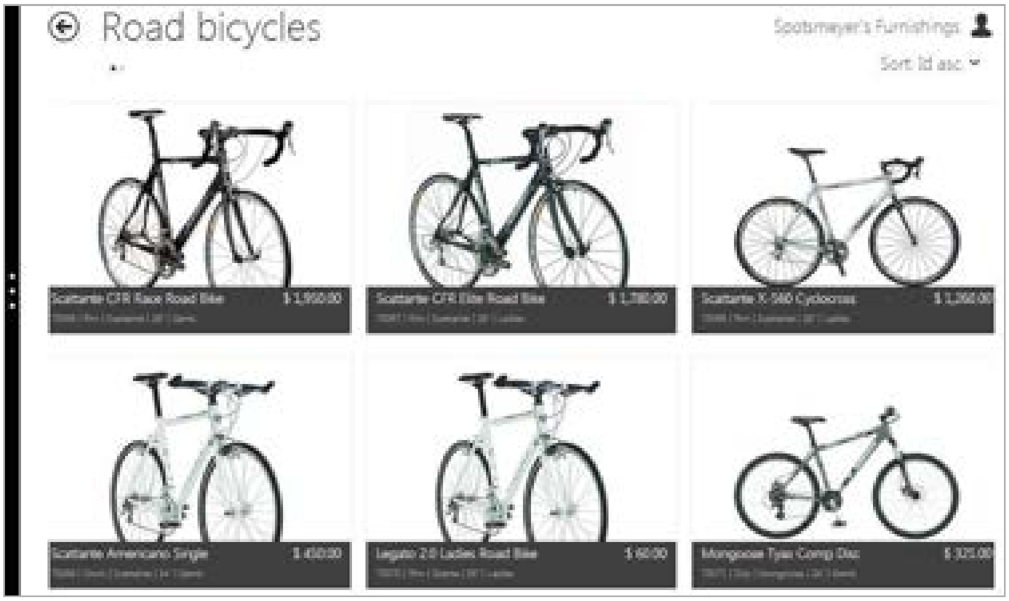
Products catalog for the Sana Mobile app can be created in Sana Admin: **Setup** > **Mobile app** > **Catalog**. To be able to browse a catalog in the Sana Mobile app at first you should create product sets and then app's navigation in Sana Admin. For more information on how to manage the content of the Sana Mobile app in Sana Admin, see "Mobile".

Catalog can be presented in two different modes, either gallery mode or list mode. Catalog presentation can be changed under the app's settings on the application bar. For the catalog presentation in the list mode you can also enable/disable product images under the app's settings.

Gallery mode: The products catalog is presented by product categories as navigation items each holding products arranged in columns. The products can be sorted by IDs, titles and prices.

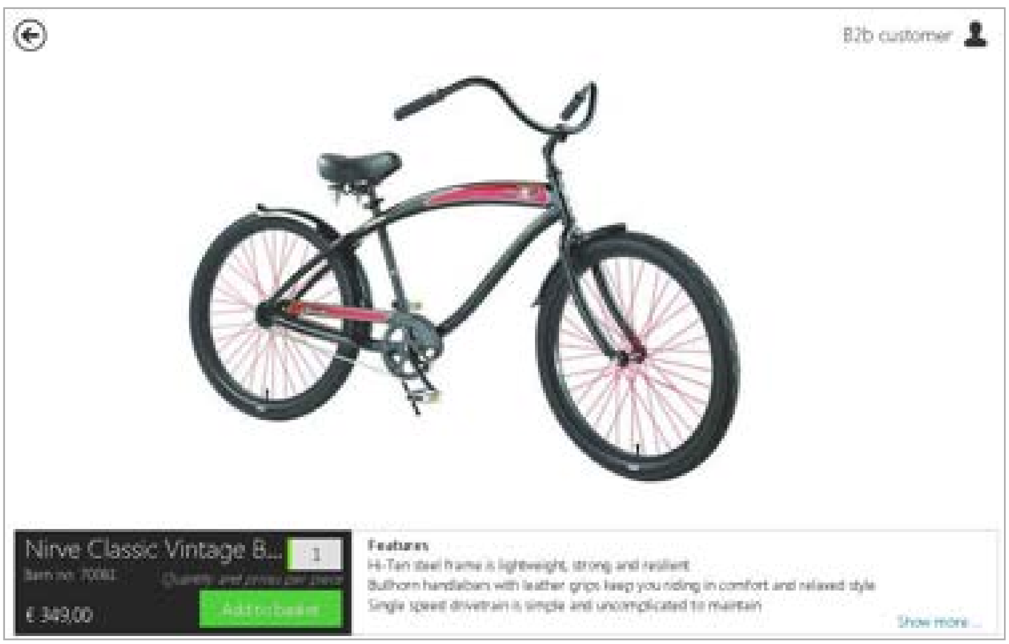


Product Categories in Gallery Mode



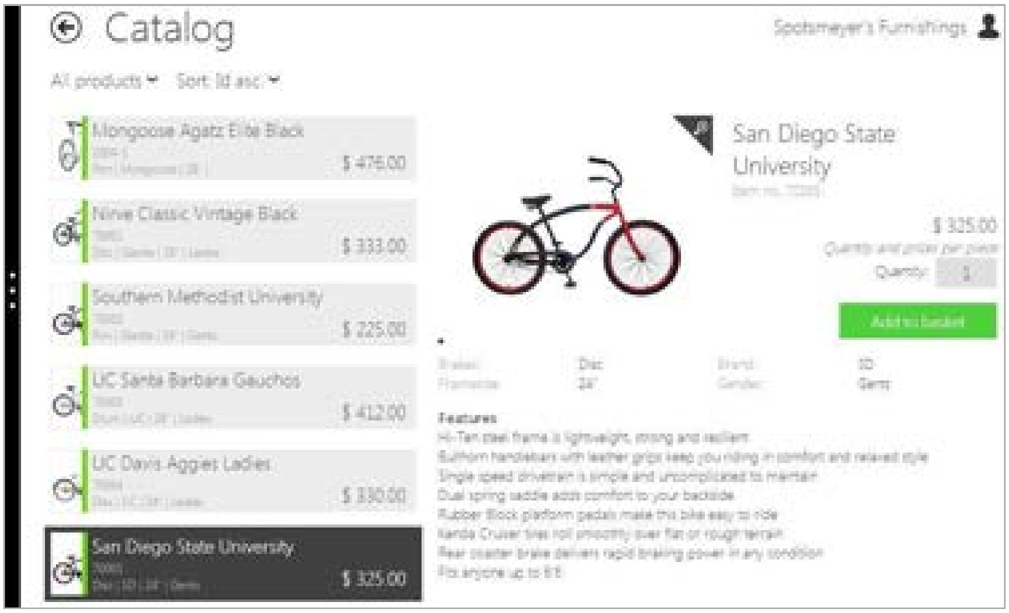
Products in Gallery Mode with Sorting Dropdown at the Top

When you browse the catalog in the gallery mode you can swipe to see more products. Up to 50 pages with products can be shown under a single category.



Gallery Mode: Product Details Page

List mode: The whole products catalog is presented in a list mode. You can switch between product categories using the dropdown at the top of the product list page. The products can be sorted by IDs, titles and prices. Unlike the gallery mode, in the list mode you can show or hide product images:

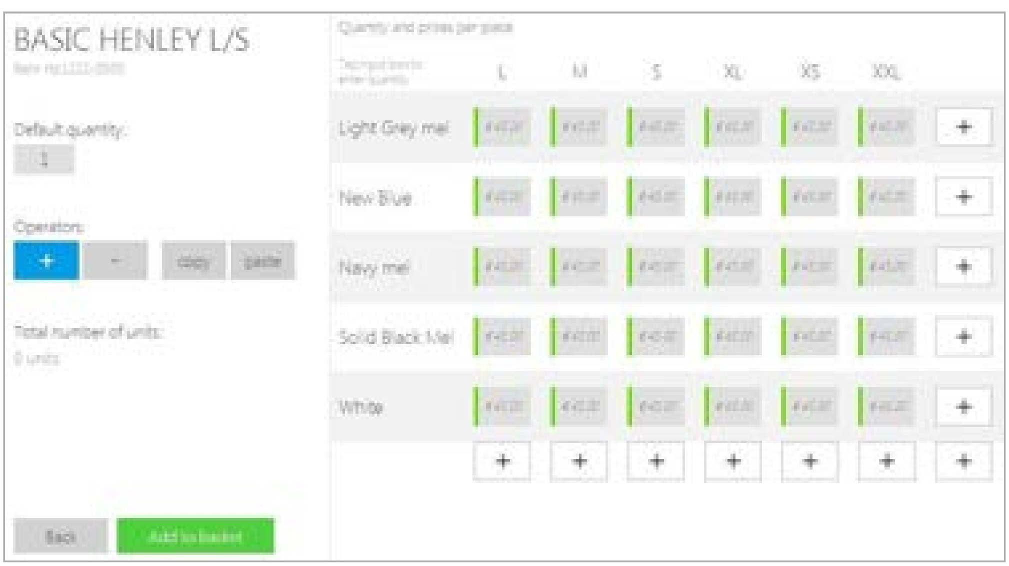


Product List Mode with the Opened Product

Using product attributes in Sana Admin catalog settings you can add different product specifications, for example brand, which will be retrieved from your ERP system and shown on the products overview and product details pages. For more information, see "Product Specifications".

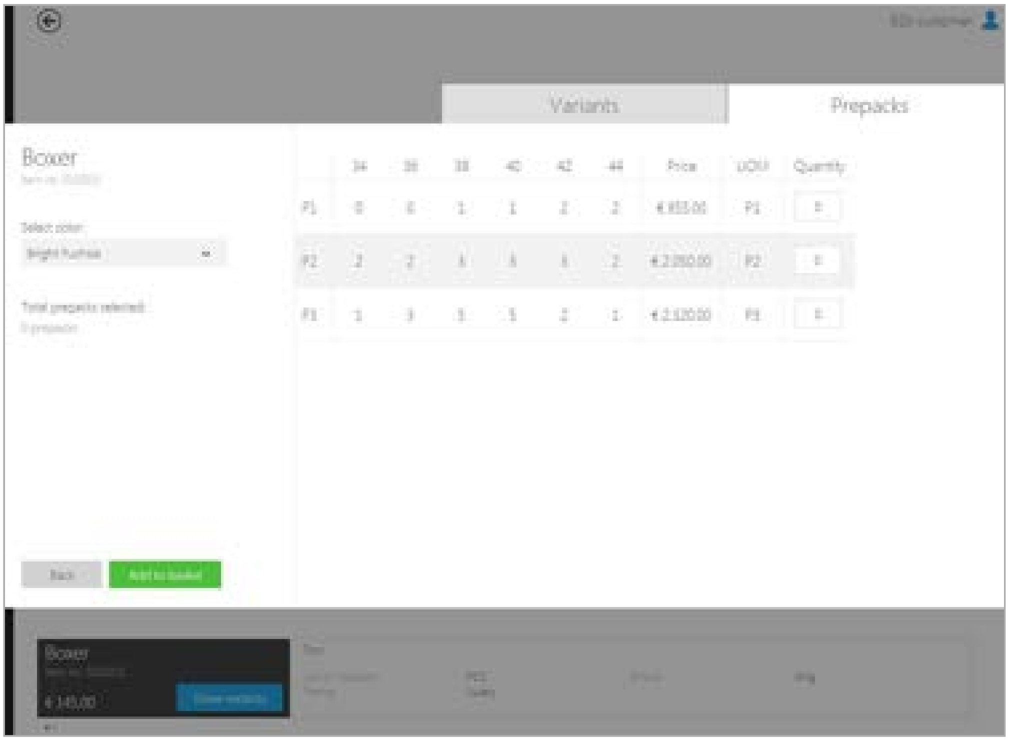
Units of measure (UOM) can be also enabled/disabled and set for the products catalog. If units of measure are enabled and set for the products in your ERP system, then quantity and prices of the products will be shown per configured unit of measure. For more information about UOM configuration, see "Units of Measure".

Product variants are shown in matrix where you can tap the input box to enter quantity. You can also set the quantity which should be used by default. A sales agent is also able to copy and paste quantities in matrix using operators. It is possible to copy the value from a single box and paste it into another one, copy all values from a matrix row and paste these values into another row and also copy all values from a matrix column and paste these values into another column:



Product Variants Matrix

The prepacks from Microsoft Dynamics NAV are also supported. They are shown on a separate tab:



Prepacks

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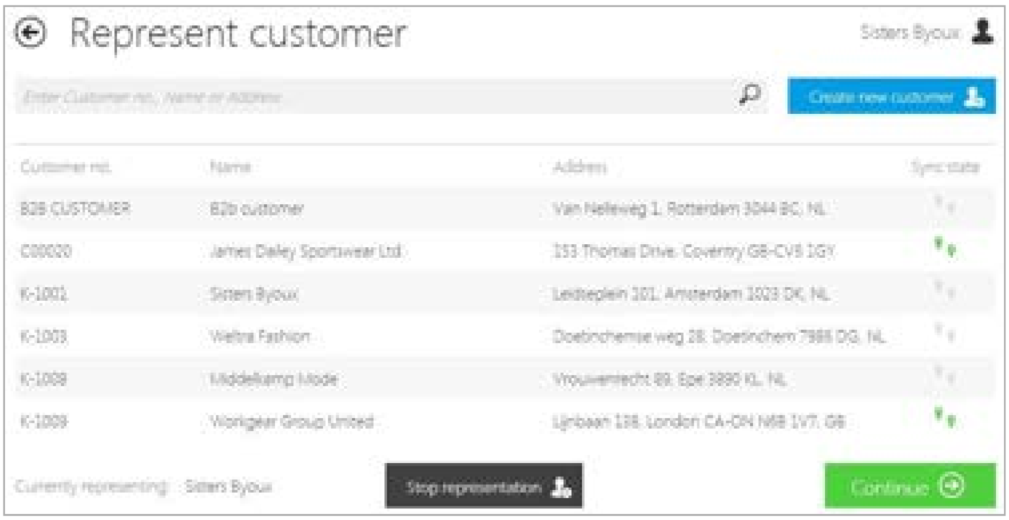
Sana Mobile App

Represent Customer

Watch the video

To be able to place an order a sales agent should represent a customer on behalf of whom the order will be made. At the top right corner there is an icon . Tap this icon to open the **Represent customer** page:



Represent Customer

On the **Represent Customer** page you can see the list of all assigned to the sales agent customers, their names and addresses. If the icon in the **Sync state** column is of a green color, this means that for this customer assortments and price rules are stored locally on device using the "Prepare your trip" option and will be applied even when your device is not connected to the internet.

Tap the customer which you want to represent and click **Continue**. When a customer is represented you can see the customer's name at the top right corner, near the icon .

On the **Represent customer** page you can also either stop customer representation or simply tap another customer to represent the other one.

You can also search for a customer by customer number, name or address. Just start typing in the search field and the customers list will be filtered.

Sales agents can also filter and represent a customer based on their GPS location. Tap **Location based search** to filter customers based on your location.

Note that when sales agent makes an order the sales taxes are calculated based on the shipping address of the customer.

From the **Represent customer page** sales agent can create a prospect. Tap **Create new customer** to open the **Create prospect** form where you can enter the prospect's personal information, like name and address:

Create Prospect

When the prospect is created the sales agent will automatically represent this prospect and can place a prospect order.

The **Create prospect** feature can be enabled/disabled in Sana Admin: **Setup** > **Customer** > **Profile fields** > **Prospect Profile** > **Create prospects**.

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Sana Mobile App

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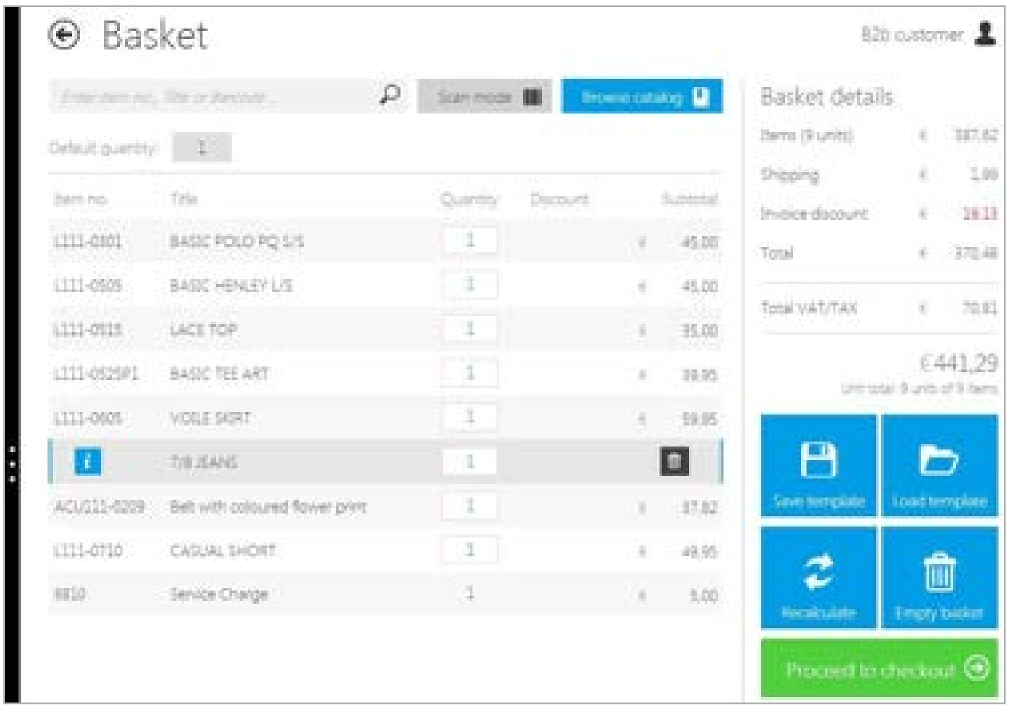
Basket

Watch the video

Sales agent can open the basket from the application bar where it is also shown the number of items in the shopping cart:



Basket

Remember that to be able to place an order sales agent should represent a customer. For information about how to represent a customer, see "Represent Customer".

Sales agents can add products to the basket directly from it using one of the modes:

Basket mode	Description
Scan mode	In this mode sales agents can use the barcode scanner to add the products to the basket. By scanning the barcode the product is automatically added to the basket. To be able to use the scan mode, barcodes should be set for the items in your ERP system and the **Bar Code** field should be added to the search index in Sana Admin: **Setup** > **ERP integration** > **Index fields**.
Browse catalog	In this mode sales agents can use the search field to search for a product by item number, title or barcode and add it to the basket. Simply start typing in the search field to filter the products. To be able to search the products by different fields, these fields should be added to the search index in Sana Admin: **Setup** > **ERP integration** > **Index fields**.

The items in the basket can be sorted by item number, title, quantity, discount and subtotal.

In the basket you can change the quantity of a product, as well as delete the product from the basket or open the product details page of the selected product. To delete the product from the basket or open its product details page tap the product and you will see the icons.

Basket details contain the information about the number of items in the basket, shipping cost, invoice discount, total VAT/TAX and total amount including and excluding VAT/TAX. Sales taxes are calculated based on the shipping address of the represented customer. To see basket details you need to recalculate the basket; till then the basket details will be empty. The basket can be recalculated only if sales agent represents a customer and your device is connected to the internet. In case if you do not have an internet connection you can still place an order and it will be stored locally on your device. Once your device is connected to the internet, the orders can be synchronized, automatically recalculated and sent to the ERP system.

The sales agent can also save order templates and then load anytime. The stored order templates do not have a reference to the represented customer. Thus the sales agent can view all saved order templates and load regardless of the represented customer. Note that if you log out all stored order templates will be removed.

Sana Mobile App

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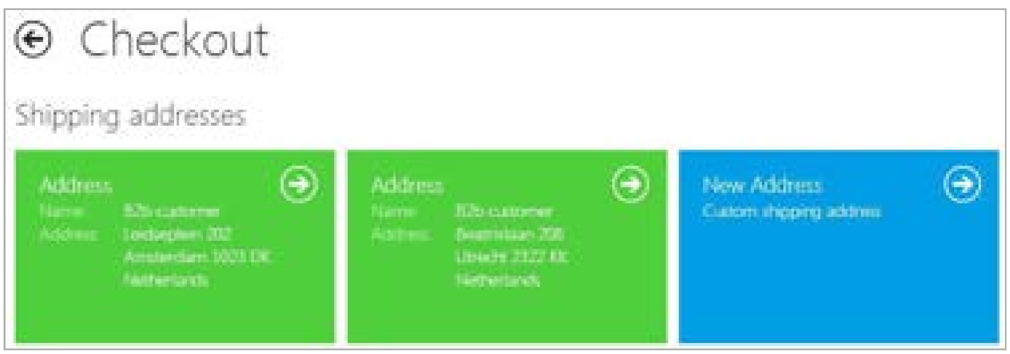
Checkout & Order Info

Watch the video

To place an order a sales agent should:

1. Represent a customer.
2. Add products to the basket.
3. Recalculate the basket if your device is connected to the internet to see basket details, like discounts, shipping cost, VAT/TAX. If your device is not connected to the internet you can still place an order which will be stored locally on your device and once your device is connected to the internet you can synchronize the orders and send to the ERP system.
4. In the basket tap **Proceed to checkout** and select your shipping address or enter the custom shipping address:

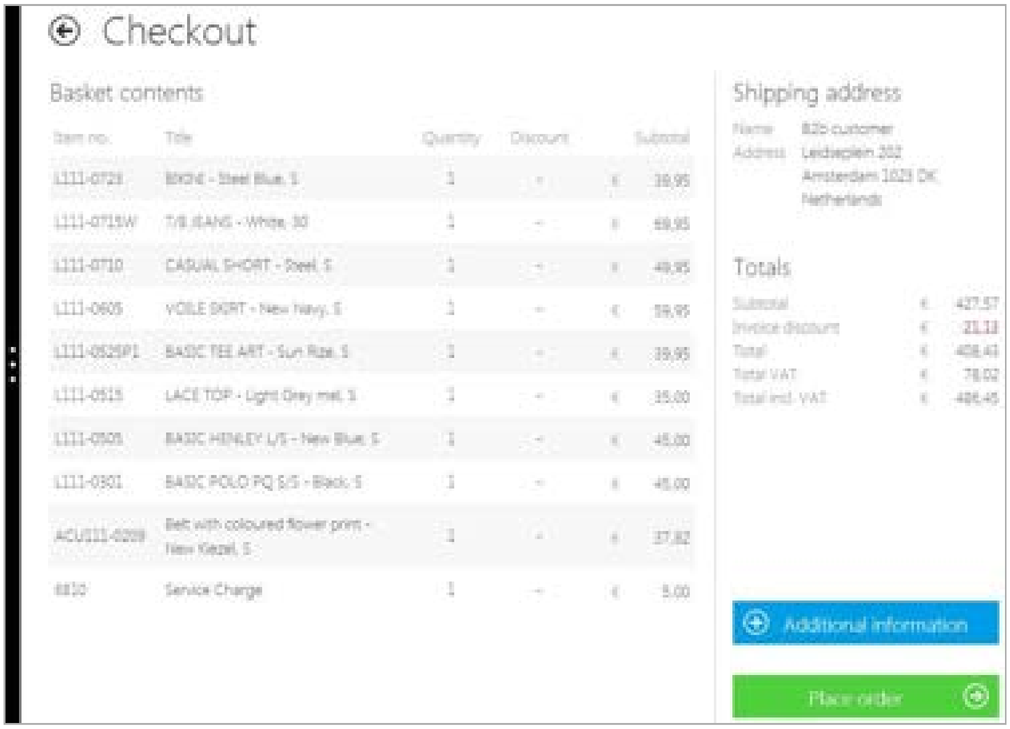
   

   Shipping Addresses

   Note, that sales taxes are calculated based on the selected shipping address of the represented customer.

   The possibility to enter the custom shipping address can be enabled/disabled in Sana Admin: **Setup** >**Ordering and checkout** > **Shipping** > **Business shipping adress** .

5. When the shipping address is selected you will see the basket contents with the selected shipping address and basket details:



Basket Contents

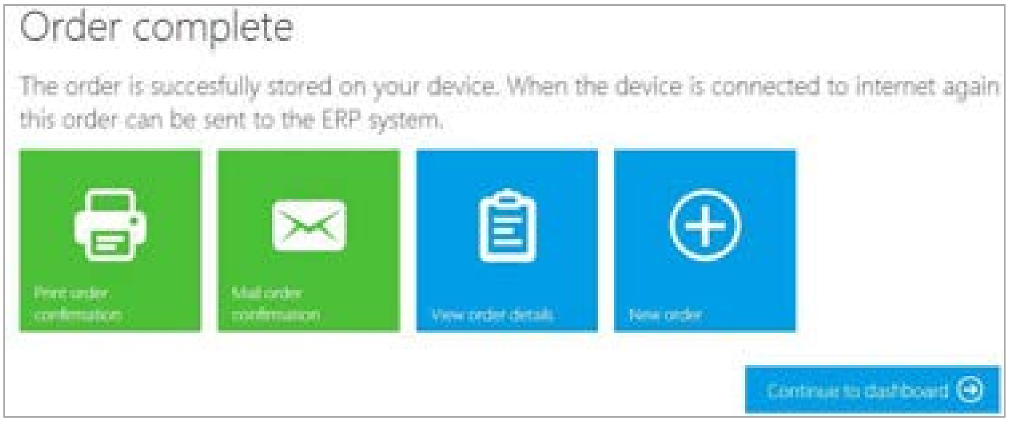
On the **Basket contents** page the sales agent can tap **Additional information** where you can enter the reference no, comments, requested delivery date and signature. The signature is stored locally and can be seen on the order details page.:

Additional Information

6. Tap **Place order**. If your device is connected to the internet, the order will be automatically synchronized and sent to the ERP system. In this case you will see the pop-up message that the local orders are successfully sent to the ERP system.

   If not, then the order will be stored locally on your device and when the device is connected to the internet the locally stored orders can be synchronized and sent to the ERP system.

When the order has been placed you can see the **Order complete** page:

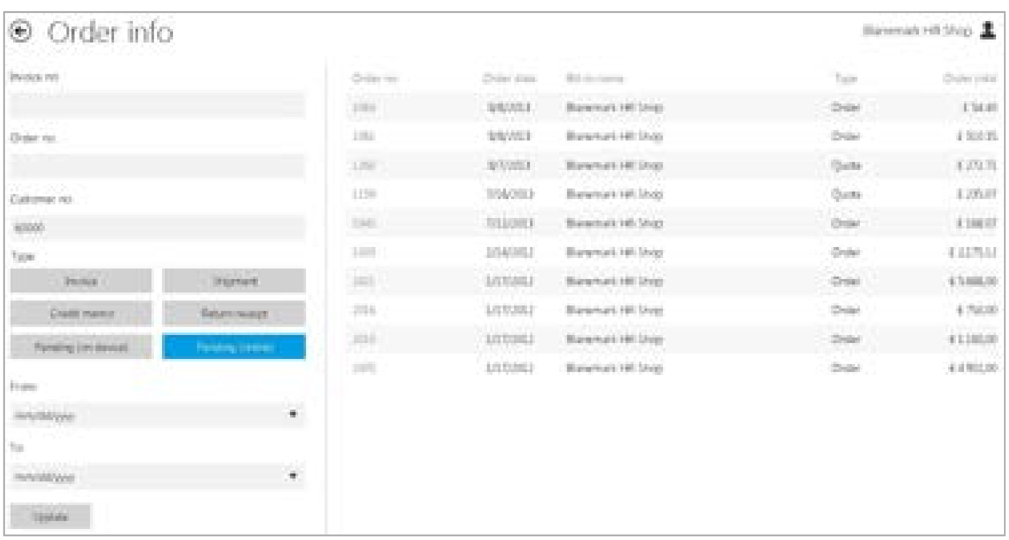


Order Complete

From the **Order complete page** you can:

Option	Description
Print order confirm	Generate the PDF file that can be printed. The order confirmation can be printed from the **Order complete** page, when the order has been placed, and from the **Order details** page.
Mail order confirm	Send the order details in the PDF format by e-mail. The e-mail with the attached PDF file is sent to the represented customer using the default e-mail app on the device. The order confirmation can be sent by e-mail from the **Order complete** page, when the order has been placed, and from the **Order details** page.
View order details	See the details of the order that has been just placed.
New order	Create a new order.
Continue to dashboard	Open the dashboard.

Sales agents can see order history and check which orders are synchronized and which not. The order history can be opened either from the application bar or dashboard. Tap **Order info** to open the order history. Orders are stored per represented customer.

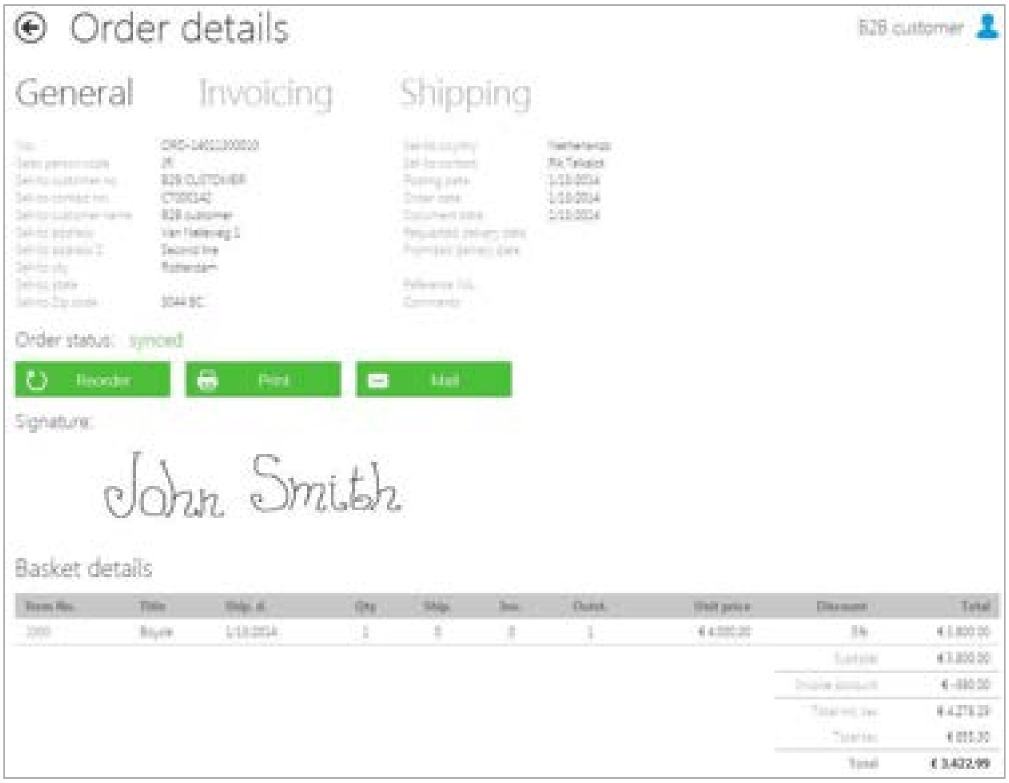


Order Info

If you have orders which have not been synchronized yet and your device is connected to the internet you can tap **Sync data** either on the application bar or dashboard and then select **Upload Order Data** to send the locally stored orders to the ERP system.

On the **Order info** page you can search for a specific order by its number and filter the orders by type and date as well as customer. If a customer is represented the orders are automatically filtered for the currently represented customer.

Tap an order to open order details. On the **Order details** page you can see all information about the order, invoicing and shipping as well as order status and signature:



Order Details

From the **Order details** page you can also print the order details and send it by e-mail with the attached PDF file. The sales agent can also reorder the previously purchased products. When you click **Reorder** the products from the order will be put to the basket where you can change the quantity of the products, remove or add the products.

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Sana Apps

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What Are Sana Apps?

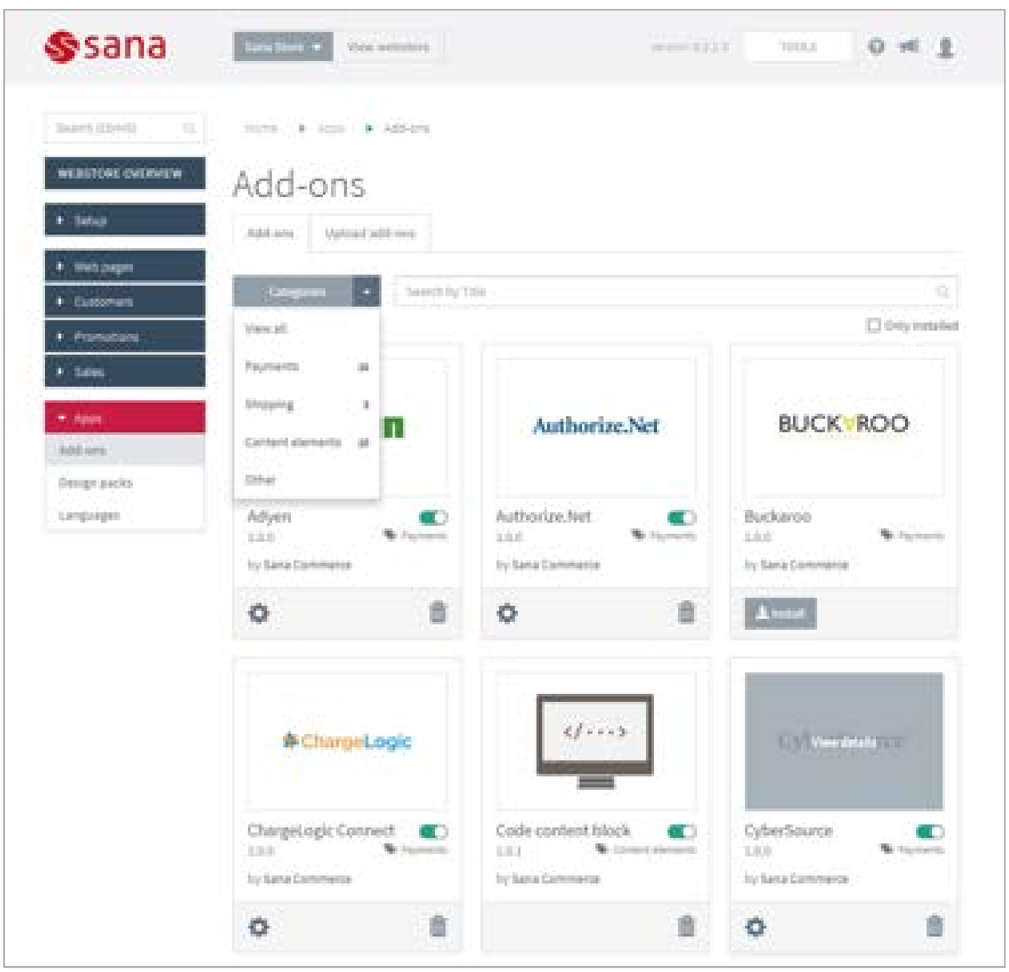
SANA APP MANUALS ›

Watch the video

Sana add-ons and design packs can transform the way you do business, whether that is delivering goods to your customers, receiving payments from your customers, managing content of your webstore, building marketing campaigns or creating an attractive and modern design for your webstore. Sana Apps is the best place to discover all Sana add-ons and design packs and to find the right app for your business needs.

With Sana Apps it is possible to add the necessary extension to your Sana webstore as simple as installing an app on a smartphone.

> **NOTE**
>
> Starting from **Sana 9.3.2**, using Sana Apps you can also install language packs for your web store.



Sana Apps

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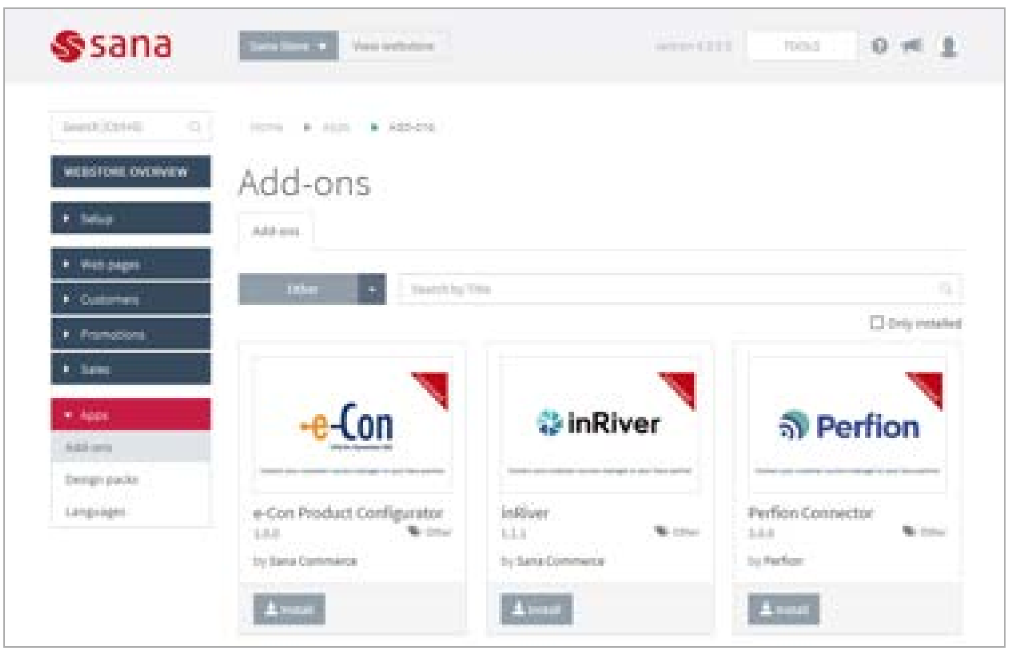
Are Sana Apps Free or Paid?

Most Sana apps are free, but there are several apps for which Sana charges an additional fee - these are the **licensed add-ons**. In Sana Admin, on the **Add-ons** page, if you see the red triangle with the word "licensed" on the add-on thumbnail, this means that this is a paid add-on and Sana charges an additional fee for it.

For example, the licensed add-ons are:

- inRiver
- Perfion Connector
- e-Con Product Configurator
- Consignor



If you want to use one of the Sana's licensed add-ons, please contact your Sana Project Manager or your Customer Success Manager before installing it to get more information, for example about the add-on price. If your Sana web store was not implemented by Sana, please contact your Sana Partner.

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Sana Apps

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How to Use Sana Apps?

SANA APP MANUALS ›

YouTube Watch the video

NOTE

If you don't have a valid Sana license for your webstore domain, you will not be available to access Sana Apps.

If you install Sana on the test environment using a "localhost" domain or some other local domain, for example "*.webstore.local", or you use Sana Commerce SDK to customize the Sana project, you will still need the Sana license for the local domain to access Sana Apps. Please, contact Sana Support to generate the Sana license to be able to access Sana Apps.

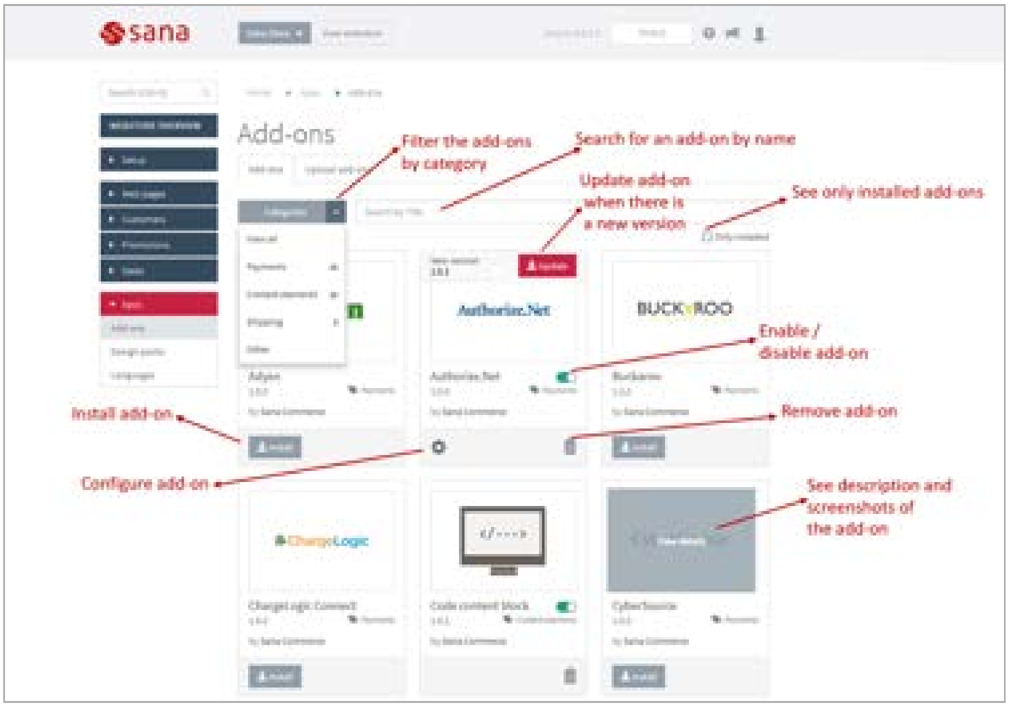
For your own safety, we have implemented a number of precautions which depend on whether you have a standard Sana product or a customized project.

A Sana webstore administrator can disable installing, removing, updating and uploading the Sana add-ons, design packs and language packs when Sana is installed on the customer's environment. This is done so that the user cannot accidentally delete or update the add-on, design pack or language pack. To make sure that no user who has access to Sana Admin will not upload some broken design pack or add-on, or some package with the malicious code, uploading of add-ons, design packs or language packs can be also disabled.

Therefore, if you don't have permissions to install, remove, update or upload the add-ons, design packs and language packs, you should contact the person who is responsible for your webstore maintenance or hosting, this can also be your Sana project manager or partner.

Standard Sana Product

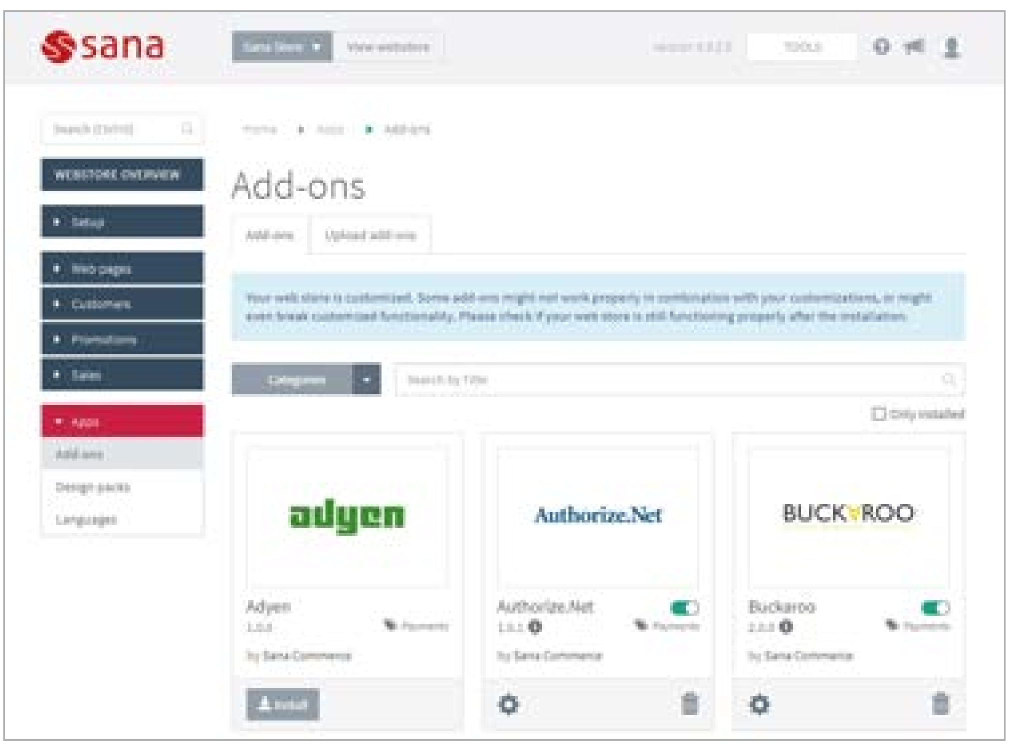
Sana customers running on the **standard Sana product** (both on-premise and in the cloud) can install, configure, upgrade and remove the Sana add-ons, design packs and language packs themselves directly in Sana Admin whenever they want.



Customized Sana Project

Those Sana customers who have a **customized Sana project** can access Sana Apps to see all available Sana add-ons, design packs and language packs, but they cannot install, upgrade or remove the add-ons and design packs themselves not to break the customized functionality. They need to contact their Sana project manager or Sana partner, if they want to install some add-on or design pack.

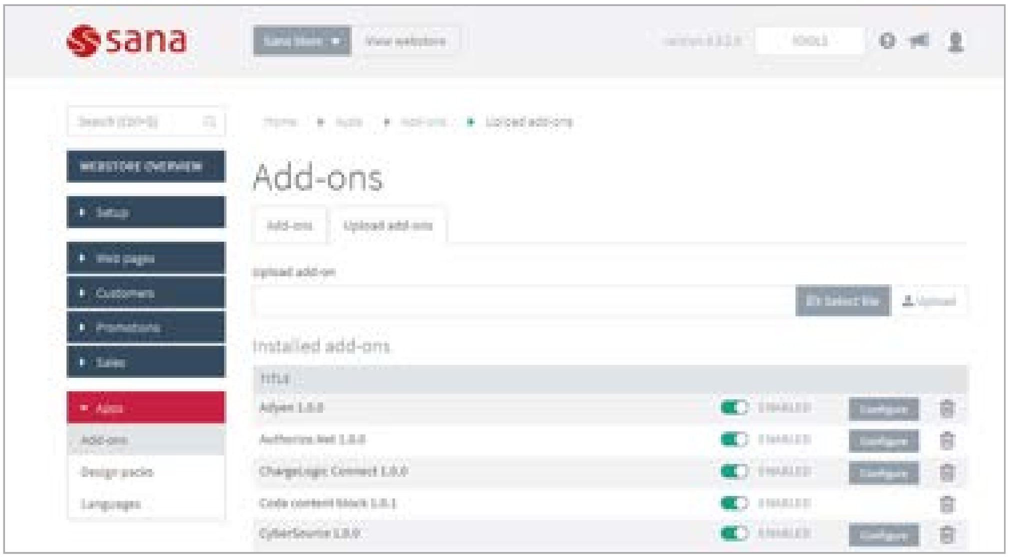
Starting from **Sana 9.3.2**, Sana customers who have a customized Sana web store can see a notification in Sana Admin. The message states that customers can install any add-on at their own risk, however some add-ons might not work properly in combination with some customizations or they might even break the customized functionality after the installation. Sana partners and Sana project managers can enable this message for the customized Sana projects in the "Web.config" file of the Sana Commerce Frontend.

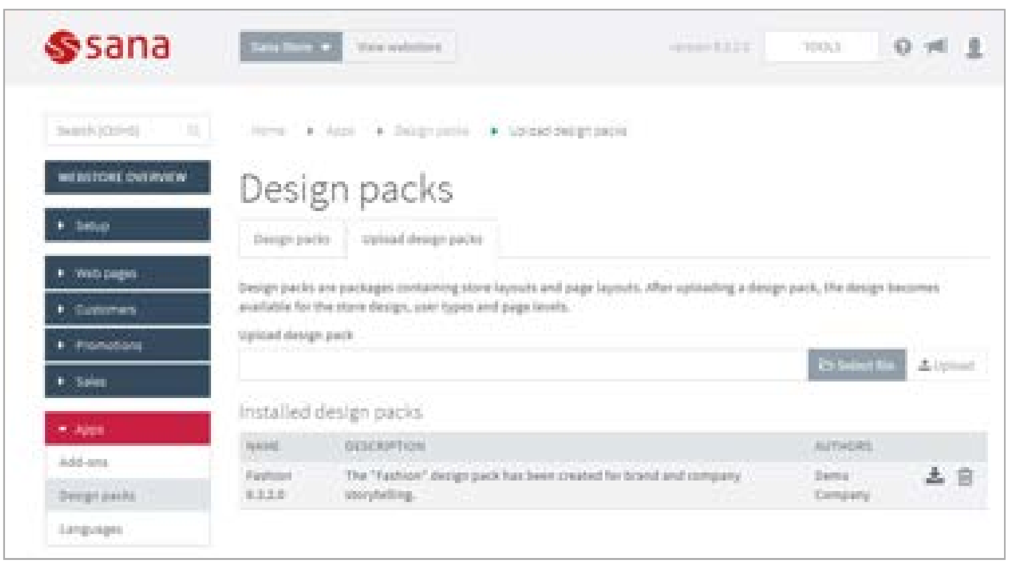


Custom Add-ons, Design Packs and Language Packs

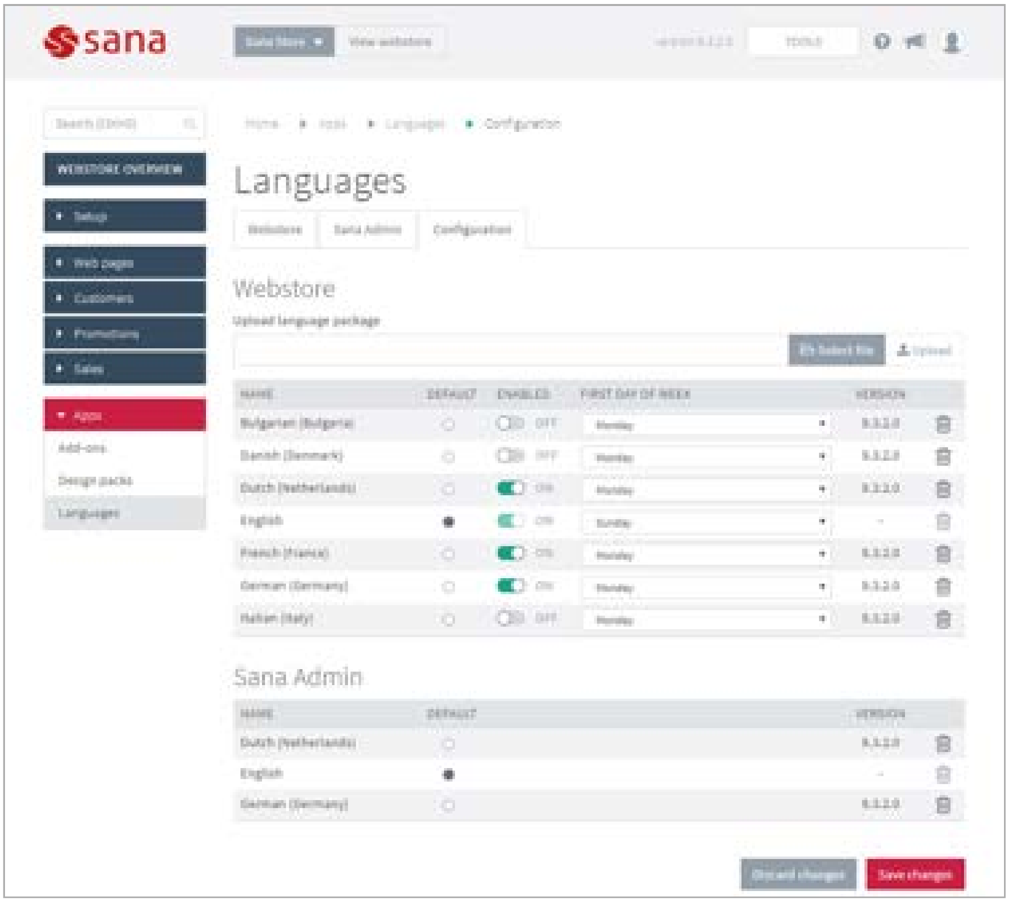
> **NOTE**
>
> Custom add-ons and design packs (non-standard / unofficial apps created by other companies but not by Sana) are outside of our control. Thus, Sana cannot be responsible for it.

Sana SDK partners, Sana project teams and other companies can create any add-on and design pack, then upload and install it on the customer's environment directly in Sana Admin. This reduces the need to customize the Sana Commerce Framework.





Sana partners can also create language packs for a web store and install them on the customer's environment directly in Sana Admin.



All custom add-ons, design packs and language packs are not shared in Sana Apps. The custom add-ons, design packs and language packs implemented for a certain project and installed on the customer's environment are not shown in Sana Apps to all other users. Sana customers and partners can see there only the standard (official) Sana apps.

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Sana Add-ons

SANA APP MANUALS ›

Watch the video

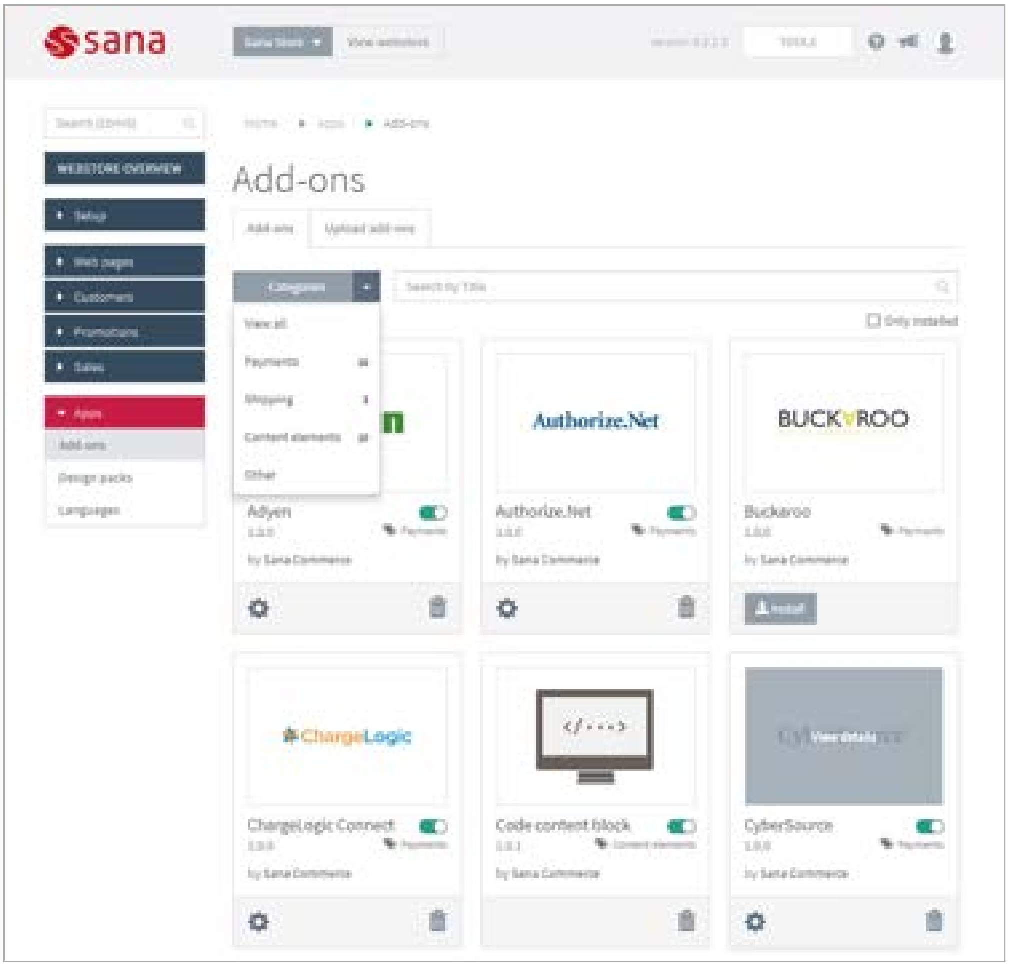
NOTE

Almost all add-ons (except **MailChimp**, **Dotdigital**, **Product Feed Export** and **Import URL Redirects**) can be installed directly from Sana Admin. Four add-ons mentioned earlier must be downloaded from Sana Community and installed manually on the Web server, like in the previous versions of Sana. These four add-ons will be available in Sana Apps in the next major Sana release.

Starting from **Sana 9.3.2**, instead of the tabs "Available add-ons" and "Installed add-ons" you can see only one tab "Add-ons". But you can now use the filter to see **only installed** add-ons.

All add-ons in the Sana Apps have been developed by Sana itself and we are constantly creating new add-ons. Here you can find the right add-on for your business needs - payment, delivery and marketing services, and different content elements.

You can see description and screenshots of the Sana add-ons, filter the add-ons by category and search for an add-on by name. Hover over the add-on thumbnail and click **View details** to see the description of the add-on.



Tab	Description
Add-ons	Here you can see all Sana add-ons and their versions, install an add-on, configure, enable and disable, update, if there is a new version, and remove, if you no longer need it. You can also use the filter to see **only installed** add-ons.
Upload add-ons	Here you can upload the add-ons. For example, Sana SDK partners can create custom add-ons for their customers and install them. On this tab you can also see all installed add-ons - standard Sana add-ons and custom add-ons. You can enable and disable the installed add-on, configure and remove the add-on. The custom add-ons uploaded to Sana are not shown on the "Add-ons" tab. Customers can see there only the standard Sana add-ons. All custom add-ons are outside of our control. Thus, Sana cannot be responsible for it.

Sana Design Packs

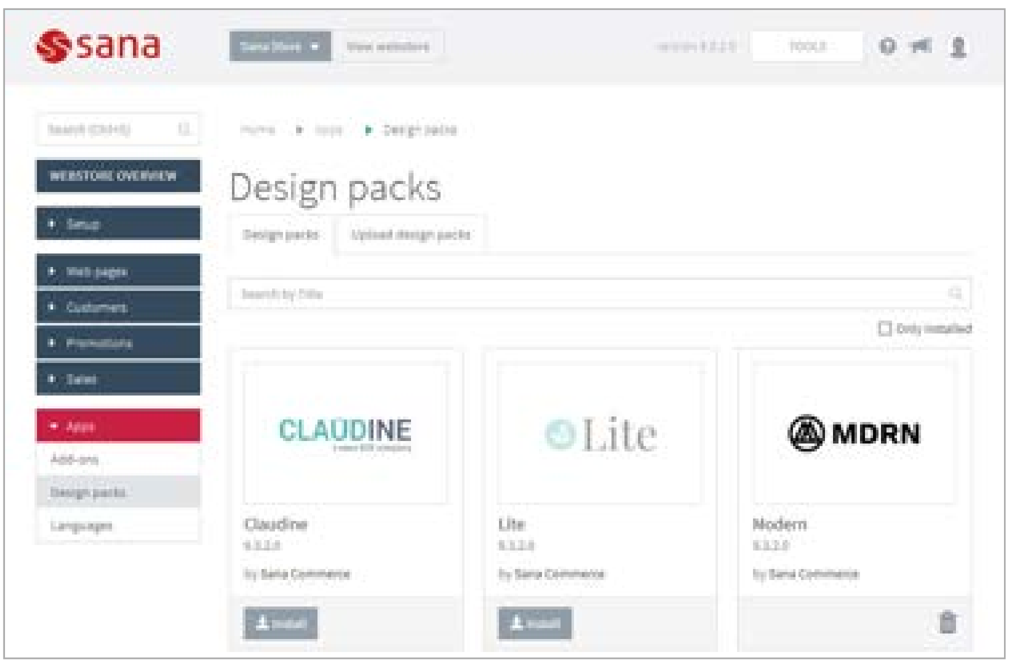
SANA APP MANUALS ›

Watch the video

NOTE

Starting from **Sana 9.3.2**, instead of the tabs "Available design packs" and "Installed design packs" you can see only one tab "Design packs". But you can now use the filter to see **only installed** design packs.

All design packs in the Sana Apps have been developed by Sana itself.



Design pack is a package which can contain store layout, page layouts and theme. By installing a design pack into Sana, the custom layouts and themes become available in Sana Admin to manage the webstore design.

If branding is essential to your company, it is important that your webstore has a consistent look. Store and page layouts, and themes are used to change the look and feel of your webstore.

You can see description and screenshots of the Sana design packs and search for a design pack by name. Hover over the design pack thumbnail and click **View details** to see the description of the design pack.

When you install a design pack, you can see the store layout, page layouts and a theme added with the design pack at the following location in Sana Admin: **Setup** > **Design**. There you can apply the store and page layouts of the installed design pack and activate the webstore theme.

Tab	Description
Design packs	Here you can see all Sana design packs and their versions, install, update, if there is a new version, and remove, if you no longer need it. You can also use the filter to see **only installed** design packs.
Upload design packs	Here you can upload the design packs. For example, Sana SDK partners or Sana project teams can create custom design packs for their customers and install them. On this tab you can also see all installed design packs - standard Sana design packs and custom design packs. You can download the installed design pack and remove it. The custom design packs uploaded to Sana are not shown on the "Design packs" tab. Customers can see there only the standard Sana design packs. All custom design packs are outside of our control. Thus, Sana cannot be responsible for it. For information about how to create a design pack, see "Design" on Sana Community. Only registered Sana partners can access this documentation.

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Languages

Watch the video

NOTE

Applies to: Sana 9.3.2 and higher

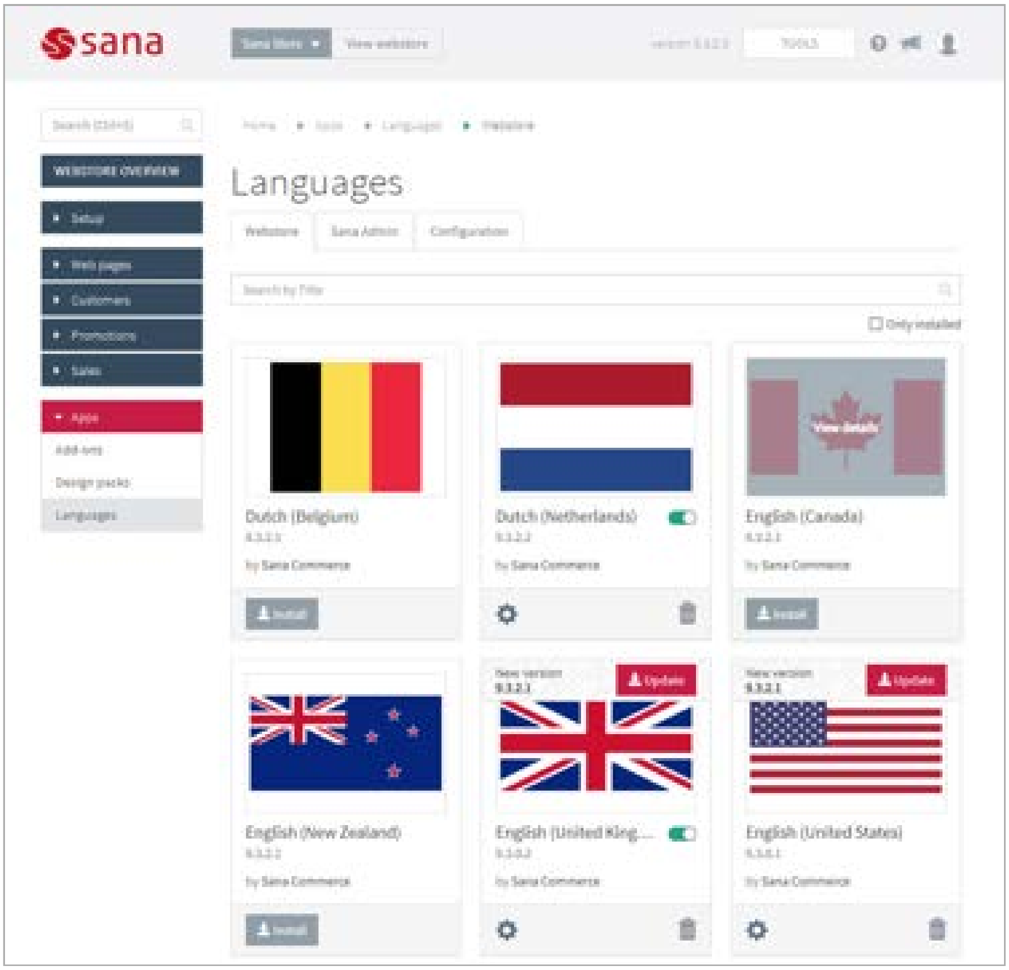
If you have Sana 9.3.0 or 9.3.1, you can configure web store languages at the following location in Sana Admin: **Setup** > **Basics** > **Languages**. For more information, see "Languages".

Sana is a multi-lingual e-commerce solution. When you install it, the Sana web store and Sana Admin are available in English. But you can install the necessary language pack and create your web store content in any language.

To manage languages, in Sana Admin click: **Apps** > **Languages**.

There you can install language packs for your Sana web store. If you have several web stores and you install a language pack, it will be installed for all your web stores, but you can configure languages for each web store individually.

Web store languages



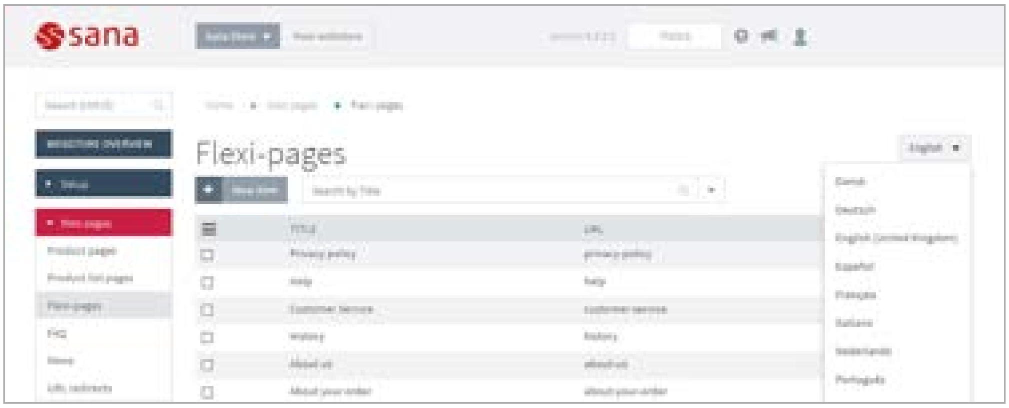
On the **Webstore** tab, you can see all available language packs for a Sana web store.

A language pack allows to display the web store interface in the language of your choice and provides flexibility to translate your web store content to any installed language. It contains the default page elements and messages of the web store interface and e-mail templates.

You can easily **install** any language pack for your web store and **uninstall** it, if you no longer need it. If a new version of a language pack is available, you can **update** it. If you have changed some default texts of the installed language pack and then update it to a new version, your changes will remain and will not be overwritten with the new version of the language pack.

Hover over the language pack thumbnail and click **View details** to see more information about it. There you can see language pack description, version and its completeness.

When the language pack is installed, a content manager can start creating the necessary web store content in the installed language. You can enable and disable the installed web store language at any time on the **Webstore** and **Configuration** tabs. All installed web store languages are available for content management in Sana Admin.



Customers can select their preferred language in the web store to see its content in the language of their choice.

By clicking the button **Configure**, you will be redirected to the **Configuration** tab, where you can set up languages. Below you can read more information about language settings.

You can also use the filter on the **Webstore** tab to see **only installed** language packs.

Sana Admin languages

> **NOTE**
>
> Unfortunately, you cannot install a language pack for Sana Admin from Sana Apps due to a technical limitation. If you need to install a language pack for Sana Admin, you can do this manually on the Web server.

By default, the Sana Amin interface is available only in English, but you can change it by installing the language pack.

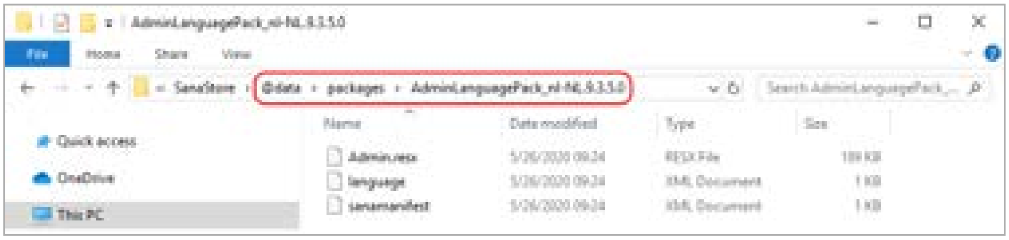
If you are a Sana Partner, you can download the language pack from Sana Community. Only the registered Sana Partners can access Sana Community. If you are a customer and you want to install the language pack for Sana Admin, please contact your Sana Partner or Sana Project Manager.

To install the language pack for Sana Admin:

Step 1: If you are a Sana Partner, download the Sana Admin language pack from Sana Community.

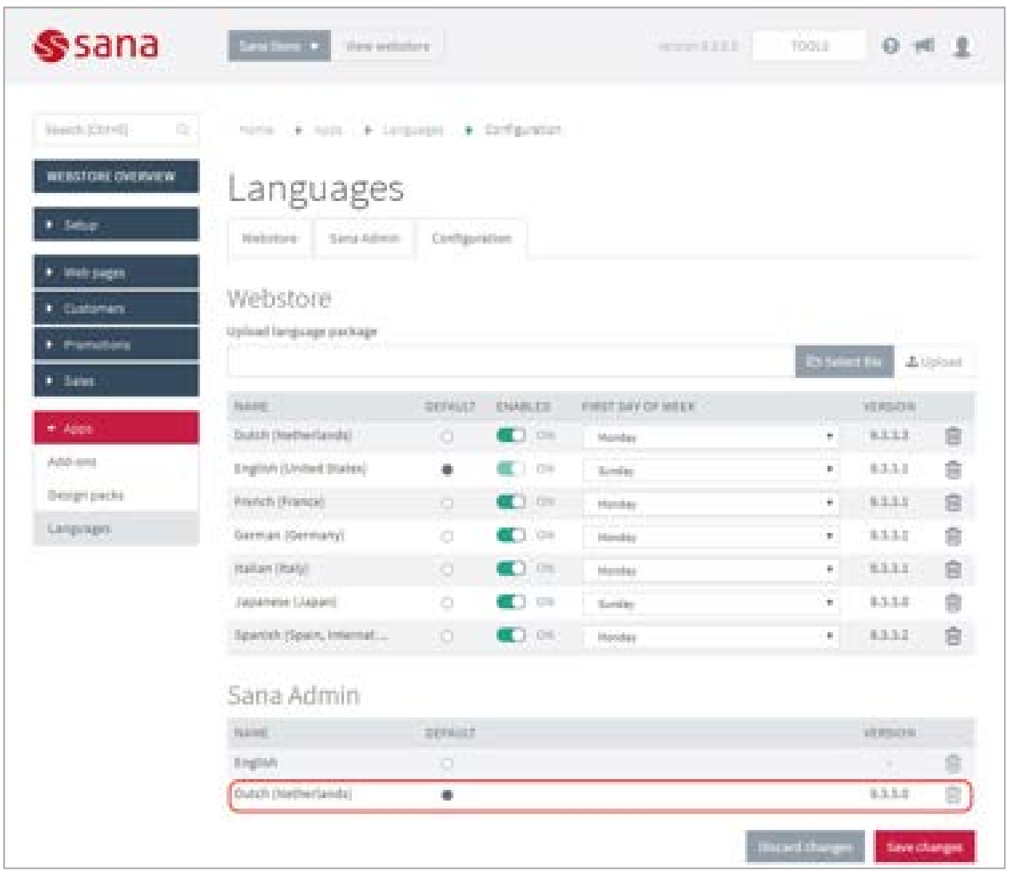
Step 2: Extract the contents of the downloaded Sana Admin language pack.

Step 3: Copy the extracted package with all files to the **@data** > **packages** directory of your Sana Commerce solution installed on the Web server. Do not change the name of the language pack folder and files inside it. See the screenshot below with the Dutch language pack as an example.

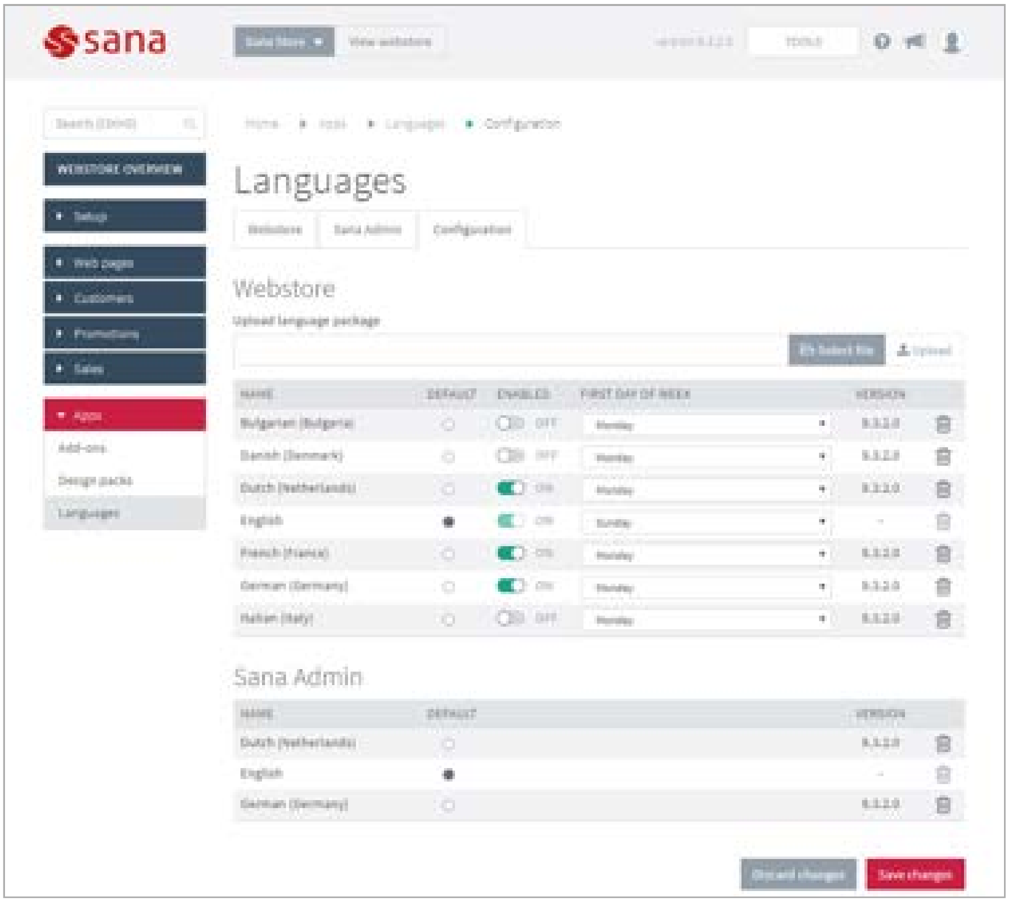


Step 4: Restart the application pool of Sana in the Internet Information Services (IIS) Manager.

Step 5: In Sana Admin click: **Apps** > **Languages** > **Configuration**. There you should see the installed Sana Admin language pack and you can enable it.



Configuration



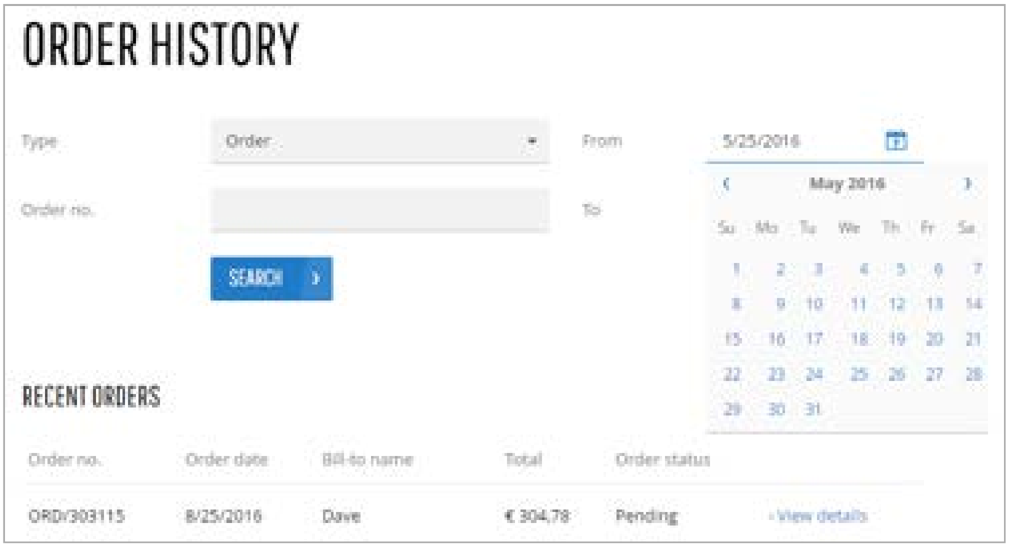
On the **Configuration** tab, you can see all installed languages for your web store and Sana Admin.

You can **enable** and **disable** any installed language for your web store. When you disable some web store language, it will not be shown to your customers in the web store, but you can continue manage your web store content for this language in Sana Admin.

You can set up the **default language** for your web store. This is necessary when you provide your web store content in different languages. When a web store visitor opens the web store, its content is shown in the default language. If a customer changes the language, next time when he or she opens the web store, it will open in the language selected previously. Information about the language selected by the customer is stored in the Web browser cookies. If the customer opens some language-specific URL which was sent to him or her or was saved as a bookmark, the web store will open in the language specified in the URL.

You can also set the **first day of the week for the calendar** shown in the Sana web store per language. According to the International Organization for Standardization (ISO 8601), Monday is the first day of the week. Although, this is the international standard, several countries, including the United States and Canada, consider Sunday as the start of the week.

In the Sana web store, the calendar is available on the **Order overview** checkout step, where a customer can define the requested delivery date, and in the order history to filter the orders by date.



When a customer changes the web store language, the first day of the week will be changed in the calendar as well, depending on the language settings in Sana Admin.

You can also see the **version** of the installed language pack.

You can **remove** the installed web store language, if you no longer need it. When you remove the installed web store language, all translated content of this language will not be shown in the web store and in Sana Admin, but it will remain in the Sana database. If you install the language pack again, all translations will be automatically restored. This is done in case a user removed the language pack accidentally.

Sana partners can also **create web store language packs** for those languages that do not exist in Sana and **upload** them on the customer's environment.

In the **Sana Admin** section, you can change the default language for Sana Admin, see the version of the installed language pack and remove it, if you no longer need it. You can enable only one language for Sana Admin.

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Sana Apps

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How to Install Sana Apps?

SANA APP MANUALS ›

Watch the video

With Sana Apps installation of the Sana add-ons, design packs and language packs is as simple as installing an app on your smartphone. You can install any add-on, design pack and language pack with a single button click.

If you have multiple webstores running on a single Sana Framework and you install an add-on, a design pack or a language pack, it will be available for all your webstores, but you need to configure it for each webstore individually.

Payment and Delivery Services

Payment and delivery service providers have global settings and those related to the payment and delivery methods.

When you install any payment or delivery service add-on, you can configure its global settings directly on the "Add-ons" page by clicking on the **Configure** button .

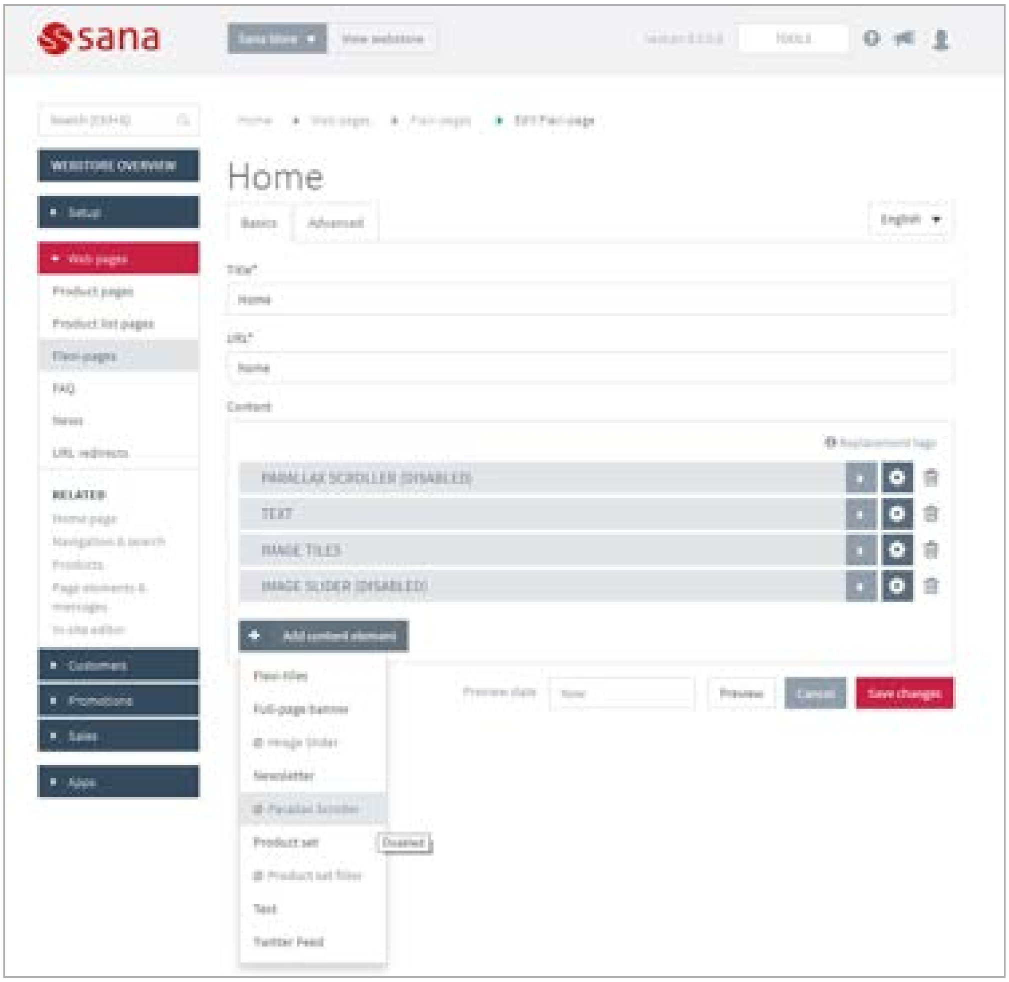
When the add-on is installed, it will be automatically available for creation of payment or shipping methods.

When you disable the payment or delivery service add-on on the "Add-ons" page, all payment or shipping methods of this add-on will be automatically deactivated and will not be shown in the Sana webstore.

Content Elements

Content elements don't have global settings. Therefore, you can't configure them directly on the "Add-ons" page. When you install a content element add-on, you will be able to add it to any web page in Sana Admin and manage its settings and content.

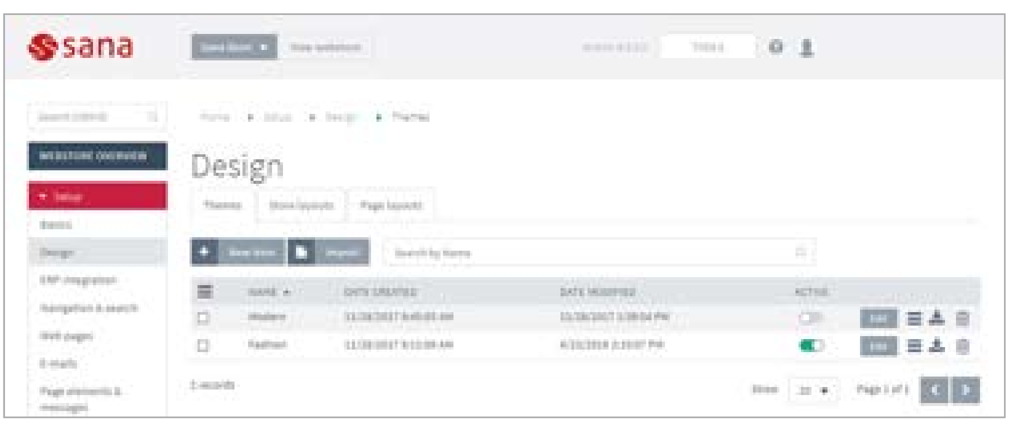
If you disable the content element add-on on the "Add-ons" page, all content elements of this add-on will be automatically disabled on all web pages and will not be shown in the Sana webstore.



Design Packs

A design pack can contain store layout, page layouts and theme that are used to change the look and feel of your webstore. Therefore, you can't configure, enable and disable a design pack directly on the "Design packs" page.

When you install the design pack, you can see the store layout, page layouts and a theme added with the design pack at the following location in Sana Admin: **Setup** > **Design**. There you can apply the store and page layouts of the installed design pack and activate the webstore theme.



Language packs

You can install language packs for the Sana web store and for Sana Admin.

A **web store language pack** allows to display the web store interface in the language of your choice and provides flexibility to translate your web store content to any installed language. When the web store language pack is installed, a content manager can start creating the necessary web store content in the installed language.

You can **enable** and **disable** any installed language for your web store. When you disable some web store language, it will not be shown to your customers in the web store, but you can continue manage your web store content for this language in Sana Admin.

You can also install a language pack for **Sana Admin**. It allows to display the Sana Admin interface in the language of your choice. When you install the language pack, the language of the Sana Admin interface will automatically change. You can enable only one language for Sana Admin.

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Sana Apps

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How to Remove Sana Apps?

SANA APP MANUALS ›

Watch the video

With Sana Apps you can remove any add-on, design pack or language pack with a single button click, but there are several precautions for your own safety.

Payment and Delivery Services

When you remove a payment or a delivery service add-on, all payment methods or shipping methods created for this add-on will be also removed. If you install the add-on again, all payment methods or shipping methods will be automatically restored. This is done in case a user removed the add-on accidentally.

Content Elements

When you remove a content element add-on, all content elements of this add-on will be also removed from all web pages. If you install the add-on again, all content elements of this add-on will be automatically restored on all web pages. This is done in case a user removed the add-on accidentally.

Design Packs

You cannot remove a design pack, if its layout is applied to your webstore, because it can break your webstore design. To remove the design pack, you must first switch to the default store layout or some other layout.

Language Packs

You can remove the installed **web store language**, if you no longer need it. When you remove the installed web store language, all translated content of this language will not be shown in the web store and in Sana Admin, but it will remain in the Sana database. If you install the language pack again, all translations will be automatically restored. This is done in case a user removed the language pack accidentally.

If you uninstall the **Sana Admin language pack**, the English language will automatically become the default language.

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