

MANAGING THE DEMANDWARE STOREFRONT

Student Guide

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Introduction

Welcome to *Managing the Demandware Storefront*.

- Class will run from 9-5 each day
- There will be coffee breaks and lunch breaks
- Introductions with names and roles

Essentials Course

Prior to class, it is recommended that you complete the *Demandware Essentials* online training that is available on XChange. Total running time is about 4 hours. To access this course:

1. Go to **Education** <https://xchange.demandware.com/community/education>
2. Click the **Training** tab.
3. Click **Add New Course or My Courses**.
4. Select **Essentials**.

Course Objectives

Upon completion of this course, you will be able to:

- Manage catalogs, categories, products, pricing & inventory, recommendations
- Manage search results, sorting rules, search refinements
- Leverage analytics
- Use coupons, source Codes, and customer Groups in promotions and campaigns
- Manage product images
- This class does not cover: Programming, Administration, Site Design, or Boot camp.

Key Concept Review

- The products you offer in your storefront are contained in a catalog
- The *master catalog* contains all of your products
- The *storefront catalog* contains only those items you offer online
- Categories organize the products on the storefront
- Catalogs contain attributes for each product that can be used later to refine a search

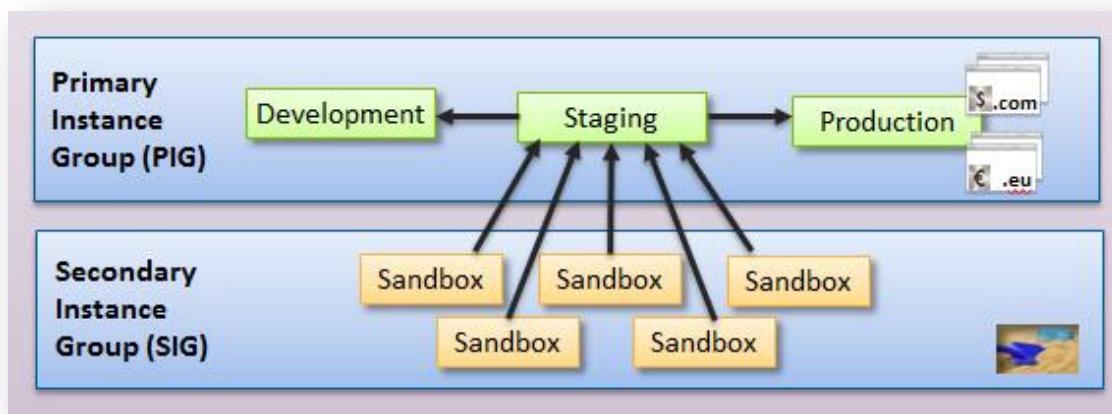
Demandware Tools

During this class you will work use Business Manager to modify and enhance your storefront. Note: Mozilla Firefox is the recommended browser, but it supports Google Chrome, Apple Safari and Microsoft Internet Explorer.

A specific URL gives access based on privileges. To access an instance each user must have a username and password that will grant access to specific modules.

Demandware Instances

A Demandware instance is a collection of resources that hosts one or more storefront sites. It provides Demandware tools to configure, customize, and manage storefront sites that include products, promotions, images and a wide variety of data types. Business Manager enables you to remotely edit and deploy new storefront functionality in a controlled manner.



- The Primary Instance Group contains three instances: Production, Staging, and Development
- The Secondary Instance Group contains a number of sandboxes, these are instances that developers can use to write and test their code.

MERCHANTS typically make changes in the Staging instance. The development instance is used for QA and testing, while Production is the instance viewed by the public. Access to each instance requires a

password. Data and code are replicated from Staging to Production and from Staging to Development. This is typically done on a fixed schedule:

Integrated Systems with Data Feeds to Demandware

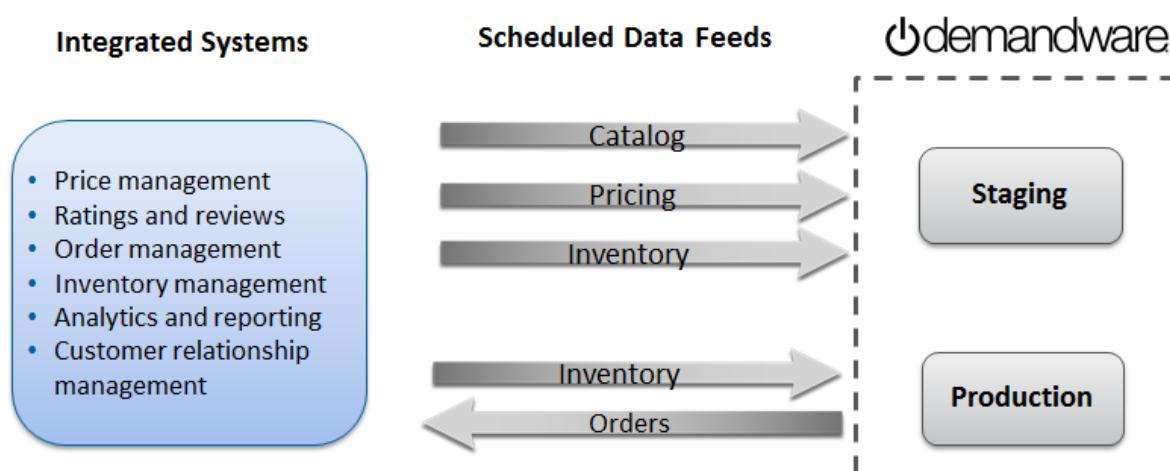
Data is fed in from other systems, examples include:

- Product data
- Catalog data
- Price data
- Inventory data

Examples of integrated systems include:

- Bazaarvoice
- Channel Intelligence
- Google Analytics
- Adobe Omniture
- IBM Coremetrics
- WebTrends
- Order Management Systems
- Customer Relationship Management Systems

Feeds deliver data into Staging and Production on a schedule:



The site administrator sets up and manages the schedule for imports. There are alternatives for an Administrator to import data:

- All changes can be made within Demandware so that imports are never done.
- The data can be loaded once and updated in Demandware thereafter.
- The changes can be imported only when the data is needed.
- The data can be continuously fed on a pre-determined schedule.

Most often, imports and exports are scheduled to take place overnight. The schedule depends on the data. For example, inventory is imported most frequently.

Preventing Data from Being Overwritten

Merchants need to know which data will be imported into Demandware and update that data in the place of origin. For example, if prices originate in the Price Management system, this may require that you update prices in the Price Management system rather than in Demandware. The pricing information will be updated in Demandware the next time the data is imported.

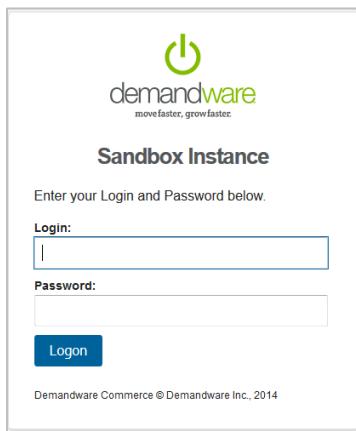


Discussion

- What systems are integrated with Demandware in your implementation?
- What is the schedule for data feeds in your implementation?

Business Manager Interface

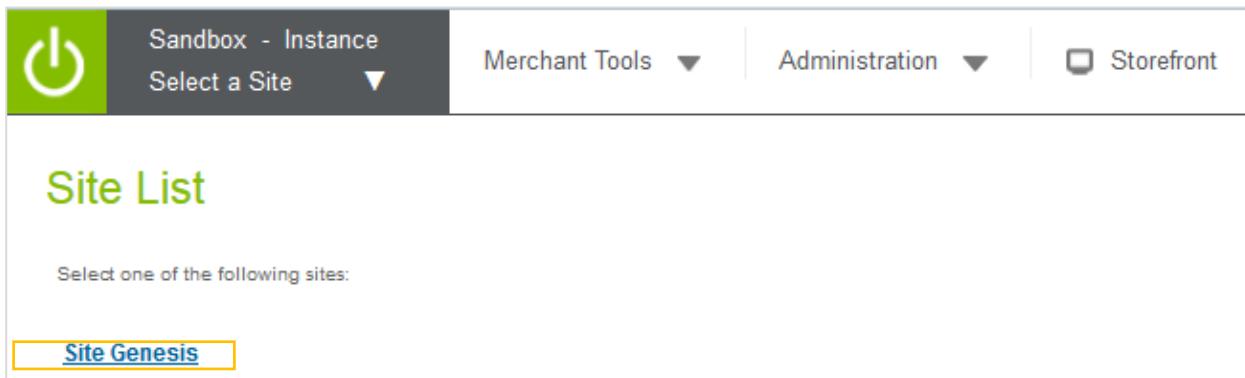
Use this screen to log in to the Business Manager:



The screenshot shows a login interface for a 'Sandbox Instance' of Demandware. At the top is the Demandware logo with the tagline 'movefaster, growfaster.' Below it, the text 'Sandbox Instance' is displayed. A message says 'Enter your Login and Password below.' There are two input fields: 'Login:' and 'Password:', both with placeholder text. A blue 'Logon' button is located at the bottom left of the form area. At the very bottom, a small note reads 'Demandware Commerce © Demandware Inc., 2014'.

Sites

In this example, only the SiteGenesis site displays, but your instance might have multiple sites. You can have different sites to offer different brands in different countries. Be sure to select the correct site.



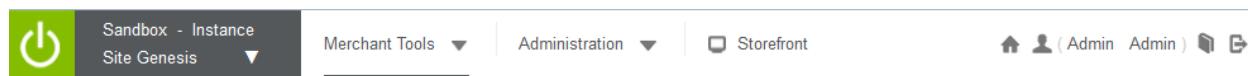
The screenshot shows the Demandware Business Manager interface. At the top, there's a navigation bar with a power icon, "Sandbox - Instance Select a Site" dropdown, "Merchant Tools" dropdown, "Administration" dropdown, and "Storefront" icon. Below the bar, the title "Site List" is displayed in green. A sub-header says "Select one of the following sites:" followed by a button labeled "Site Genesis".

Once logged in, the icons on the top right are: home, user profile, documentation and logout

Note: Do **not** use the browser's back button.

Business Manager Menu and Modules

Business Manager contains menus for Merchant Tools and Administration tasks as well as access to the Storefront for the selected site.



The screenshot shows the Demandware Business Manager interface with the "Merchant Tools" menu item highlighted in blue. The top navigation bar includes a power icon, "Sandbox - Instance Site Genesis" dropdown, "Merchant Tools" dropdown, "Administration" dropdown, and "Storefront" icon. On the far right, there are icons for home, user profile, documentation, and logout.

Merchant Tools

Use the modules below to manage site-specific aspects of the application.

[Products and Catalogs](#)

Manage the catalogs and products of this site.

[Content](#)

Manage the non-product content of this site.

[Search](#)

Manage storefront search indexes and sorting options of this site.

[Online Marketing](#)

Manage the online marketing activities of this site.

[Customers](#)

Manage the customers of this site.

[Custom Objects](#)

Manage custom objects of this site.

[Ordering](#)

Manage the orders of this site.

[Analytics](#)

Browse reports of this site.

[Site URLs](#)

Manage site aliases and URL mapping rules.

[Site Preferences](#)

Set preferences for this site.

The modules displayed depend on your role and the privileges assigned to you by your Administrator. If you need access to an additional menu item or a module, ask your Administrator to provide access.

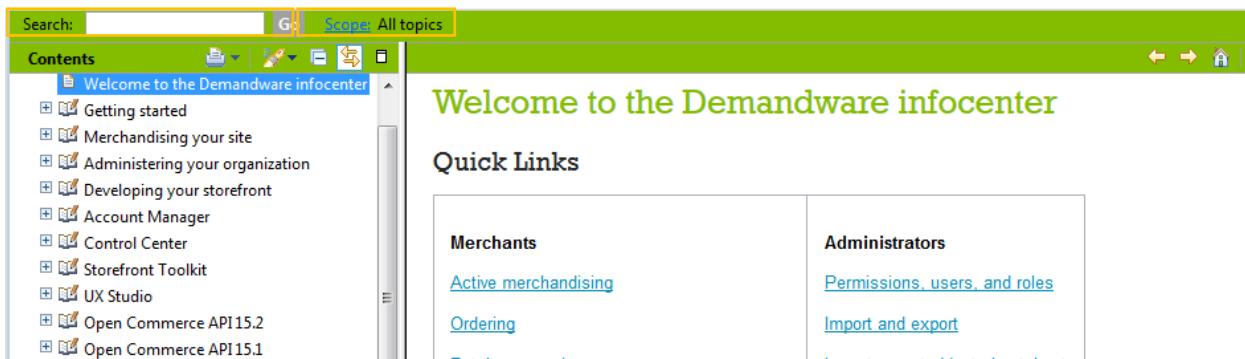
The Administrator is able to create roles and privileges inside Business Manager.

Online Documentation

To access the documentation from Business Manager, click this icon: 

Note: You must supply a username and password for XChange Collaboration Center.

Use the search box to search for topics:



The screenshot shows the Demandware infocenter interface. At the top, there is a search bar with the placeholder "Search:" and a "G" button, followed by a "Scope: All topics" dropdown. On the left, a sidebar titled "Contents" lists various topics under "Welcome to the Demandware infocenter", including "Getting started", "Merchandising your site", "Administering your organization", "Developing your storefront", "Account Manager", "Control Center", "Storefront Toolkit", "UX Studio", "Open Commerce API15.2", and "Open Commerce API15.1". The main content area features a title "Welcome to the Demandware infocenter" and a "Quick Links" section. The "Merchants" section contains links to "Active merchandising" and "Ordering". The "Administrators" section contains links to "Permissions, users, and roles" and "Import and export".

Module 1: Catalogs

Objectives

Upon completion of this module you will be able to:

- Describe the role of the catalog

Introduction

Catalogs are flexible and extensible frameworks which:

- Act as a container for products, categories, and images
- Support multi-site, multi-brand, and multi-language implementations
- Provide access to business attribute definitions
- Are assigned to a storefront to provide a structure for the storefront navigation and search

Master catalogs and storefront catalogs

There are two types of catalogs: the master catalog and the storefront catalog.

Each storefront needs to have one and only one catalog assigned to it that drives the navigation of the storefront. This catalog is called the *storefront catalog*. The categories in the storefront catalog are displayed 1:1 on the storefront.

This example shows a catalog scenario for a single site. For simplicity, there is only a storefront catalog.



Although this example uses only one catalog, it is possible to work with several catalogs at once – by using a *master catalog*. These catalogs contain the product data. A product that is owned by a master catalog can also be assigned to a storefront catalog so it will display online.

You can share a master catalog between several sites. A set of products from a master catalog can be assigned to one storefront catalog; and a different set in the same master catalog can be assigned to another storefront catalog.

In this way, you can present different products to your customers in two different countries, but still manage the products centrally in one catalog.

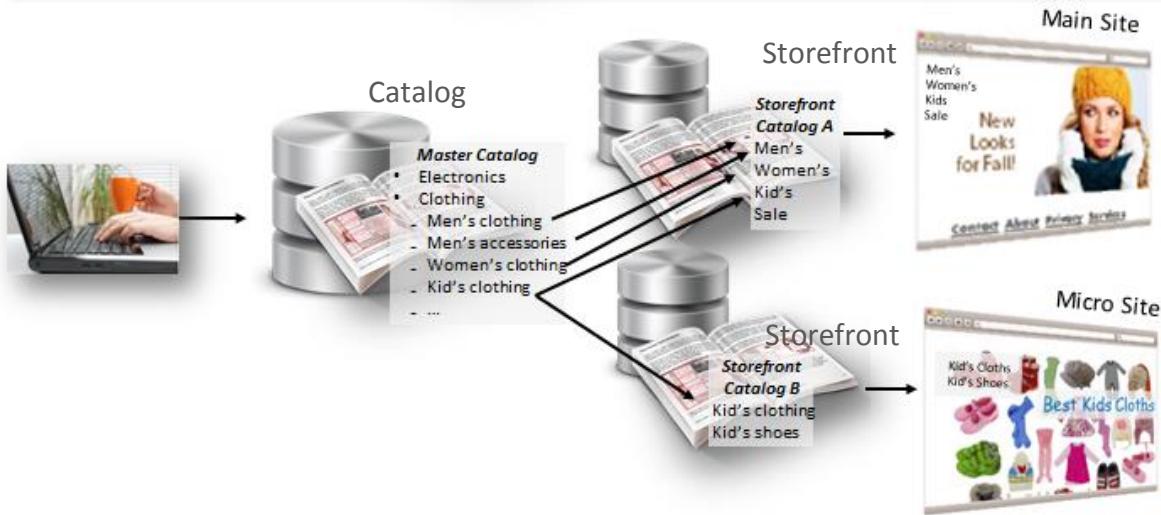
The categories in a master catalog can be completely different from the ones in the storefront catalog. In fact, category trees cannot be shared among catalogs.

Catalogs								
Catalogs								
The list below contains all catalogs defined by your organization along with some statistical information about the catalog content. Please note, that this information is not updated in real-time.								
Select All								
ID	Site Assignments	Categories	Products Owned	Products Assigned	Recommendations	Status		
apparel-catalog		28	4.482	4.477	0	Online	Edit	
electronics-catalog		15	159	159	0	Online	Edit	
storefront-catalog-en	Site Genesis	66	0	4.641	1.865	Online	Edit	
Refresh New Delete								

Here is an example a storefront catalog that has been assigned to the site and has 66 categories:

Catalogs								
Catalogs								
The list below contains all catalogs defined by your organization along with some statistical information about the catalog content. Please note, that this information is not updated in real-time.								
Select All								
ID	Site Assignments	Categories	Products Owned	Products Assigned	Recommendations	Status		
apparel-catalog		28	4.482	4.477	0	Online	Edit	
electronics-catalog		15	159	159	0	Online	Edit	
storefront-catalog-en	Site Genesis	66	0	4.641	1.865	Online	Edit	
Refresh New Delete								

This example shows a catalog scenario for two different sites. The category structure is different in the master catalog and the two storefront catalogs. The products are owned by the master catalog and assigned to the storefront catalogs.



Lesson 1.1: Configuring Catalog-Level Image Management Settings

You can manage the images associated with the products in your catalog. Demandware supports:

- Multiple images per product
- Image sub-sets for variation products

Catalog settings for images include:

- The location of images (internal / external)
- View types
- Image annotation defaults
-

To view and manage global image settings:

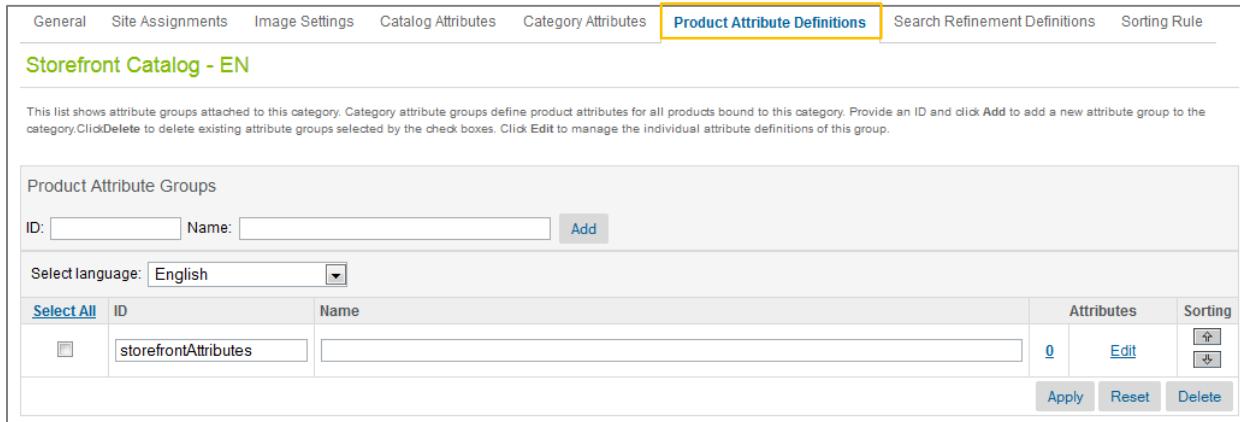
1. Go to **Merchant Tools > Products and Catalogs > Catalogs**.
2. Click **Edit** to edit a catalog.
3. Select the **Image Settings** tab.



Lesson 1.2: Configuring Catalog-Level Product Attribute Settings

You can assign attributes to products at the catalog level – these attributes are inherited downwards to all categories and their products. This kind of inheritance can be overridden at any level. You set the most general attributes (like name, long description) at the catalog level.

You can define product attributes in the catalog's Product Attribute Definitions tab and use them later as search refinements.



The screenshot shows the 'Product Attribute Definitions' tab selected in the top navigation bar. Below the header, a note states: 'This list shows attribute groups attached to this category. Category attribute groups define product attributes for all products bound to this category. Provide an ID and click Add to add a new attribute group to the category. Click Delete to delete existing attribute groups selected by the check boxes. Click Edit to manage the individual attribute definitions of this group.' The main area displays a table titled 'Product Attribute Groups'. The table has columns for 'Select All', 'ID', 'Name', 'Attributes', and 'Sorting'. A single row is visible, showing an unchecked checkbox under 'Select All', the ID 'storefrontAttributes', and the name 'storefrontAttributes'. To the right of the table are buttons for '0', 'Edit', 'Apply', 'Reset', and 'Delete'. The 'Edit' button is highlighted in blue.

These attributes are managed in groups. Enter an ID and a name for a new group; a list of all attributes that you can choose to add to your group displays.

Module 2: Categories

Objectives

Upon completion of this module you will be able to:

- Add, edit, and delete categories
- Move and copy categories
- Differentiate between category attributes
- Explain category organizational structure, and inheritance

Overview

Categories organize the structure of products on a storefront. A catalog contains a category tree, a hierarchy of nested categories. This category tree drives the storefront navigation, enabling the customer to browse the storefront from one grouping of products to the next. This makes it easier to find products quickly.

Attributes such as, Product Name and Product Long Description are inherited down the category tree. This means that a child category inherits the attributes of its parent category, and so on. Inheritance is one of the most important principles for organizing your data.

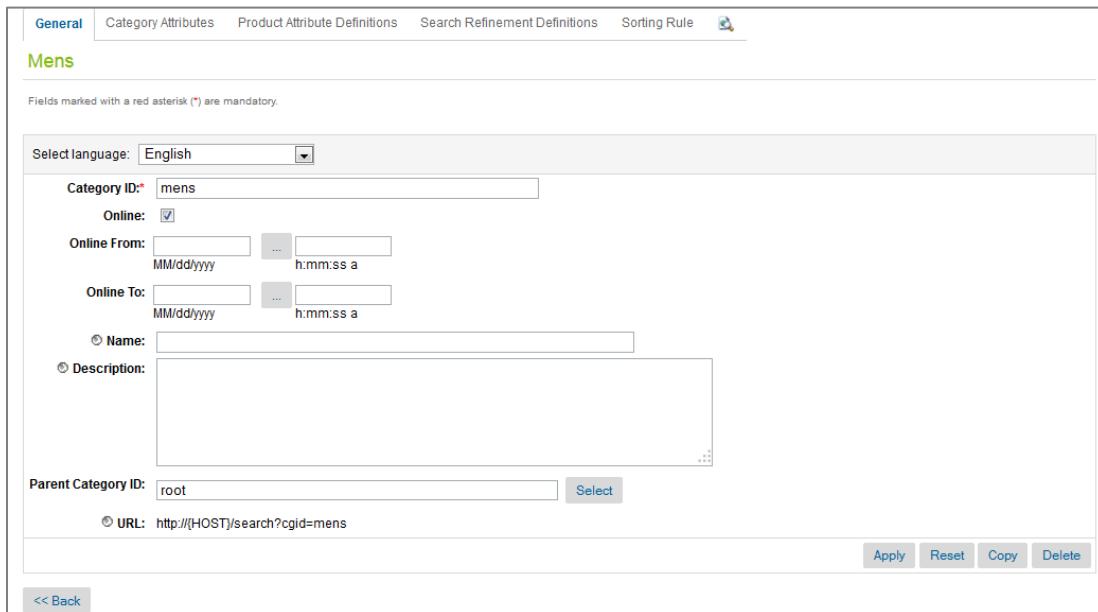
When you begin your storefront site implementation, you identify the structure and hierarchy for your categories. Categories and products are frequently imported from a legacy system.

Access categories through their respective catalogs.

Editing Categories in Business Manager

1. Go to **Merchant Tools > Products and Catalogs > Catalogs** >{select a catalog}.
2. Click the **Edit** button of a category.

The following screen displays:



This screenshot shows the 'General' tab of a category configuration screen. The category name is 'Mens'. The 'Category ID' is set to 'mens'. The 'Online' checkbox is checked. The 'Online From' field is empty, and the 'Online To' field is also empty. There are two radio buttons: one for 'Name' (selected) and one for 'Description'. The 'Description' field is empty. The 'Parent Category ID' is set to 'root'. The 'URL' is set to 'http://[HOST]/search?cgid=mens'. At the bottom right are buttons for 'Apply', 'Reset', 'Copy', and 'Delete'.

It contains the following tabs:

General Tab

This tab identifies the general attributes for the category (for example, category ID, name, description, online, and online dates).

Select Language (Locale)

Selecting language enables you to enter the text for a language. When you enter French text, the customer must switch their storefront language to French to view that text. This is used in categories, products and elsewhere in Business Manager.

Example: If your site has both English and French, then you would enter the category name "Men" in English then switch to enter "Homme" in French.

Category Attributes Tab

This tab enables you to specify Search Engine Optimization, Sitemap Attributes, Presentation Attributes, Search Ranking, and other custom attributes.

Product Attribute Definition Tab

This list shows attribute *groups* attached to this category. Category attribute groups define product attributes for all products bound to this category. Provide an ID and click **Add** to add a new attribute group to the category.

Search Refinement Definitions Tab

This tab identifies the search refinements for each category. This enables customers to refine a search using multiple attributes, such as price, category, or a product attribute. This reduces the quantity of products displayed on the storefront.

Example: Customers may use search refinements to find TVs based on screen size, price and manufacturer. This is particularly useful to filter a large catalog when a customer is looking for very specific products.

Example: Customers may use search refinements to reduce the quantity of products displayed so that only women's shoes in size 4 ½ are displayed on the storefront.

Sorting Rule Tab

This tab identifies the rule used to sort products for this category.

Magnifying Glass Icon

This icon enables you to preview the category on the Storefront



Knowledge Check

Login to your storefront, review the catalog structure in the navigation bar, and answer these questions.

- a. How many categories are there?
- b. How many subcategories are there?
- c. Can you identify some of their attributes?



Lesson 2.1: Creating a Category

When you design your storefront site, you specify the main categories to include in the storefront's navigation bar. As trends change, you can add or remove categories.

To add a category:

1. Go to **Merchant Tools > Products and Catalogs > Catalogs**.

2. Navigate to the category where you want to add your category.
3. Click **New**.
4. When adding a new category, start with the **General** tab.
5. Enter the Category ID based upon the category naming convention that your team has defined.
Note: Do not use special characters in ID fields. Spaces are fine.
6. Check the **Online** box.
7. Optional: Enter the **Online from** and **Online to** dates to define a date range for the category. When you specify a date range, the category is displayed on the storefront only within the specified range. You can specify a start date, end date, or both. Leaving these blank indicates that the category display on the storefront continuously.
8. **Name** is the visually displayed name on the storefront navigation menu.
9. **Parent Id** identifies the category directory location. To view the category structure and select the parent id. Click **Select**.
10. Click **Apply**.
11. The other tabs of the new category are now accessible.
12. Click the **Category Attributes** tab.
13. Select **Show in menu navigation**.

Category Attributes Tab

Search Engine Optimization (SEO) Attributes

You can set SEO attributes (Page Title, Page Description, Page Keywords, Page URL) at the category level that override the site settings. The best practice is to populate and regularly tune the SEO to boost search engine performance. SEO can be imported using XML or entered manually.

Note: The Page URL is just the portion of the URL relating to the page name that you want to display to the customer in their browser, not a complete URL.

Note: Hover over a question mark icon on the right to view the attribute name, ID and a brief description of the attribute.

Site Map Attributes

Use these attributes to provide search engines (such as Google, Yahoo and MSN) with information about a given Web site so the crawler can index it more efficiently. The search engine uses this information to construct links to your site and control the ranking of links in its search results.

- Included: Indicates whether a category is included into the site map.
- Change Frequency: Indicates to search engines how frequently the page might change. This indicates to the crawler how often to come back to get new information.

- Priority: Indicates to the search engine the relative importance you place on the category. The range is from 0.0 to 1.0 and is relative to other categories on your site.

Presentation Attributes

Categories frequently have a banner image displayed at the top of the category. The format is done with a rendering template or custom CSS. Work with your development team to create a custom rendering template.

Custom

The **Show in Menu Navigation** check box determines whether this category will be visible in the menu on your storefront. Usually it should be checked. Otherwise, it will be hidden from display on the storefront. For example, you could create a hidden *sale* category that might contain products for a future promotion.

The other fields in the custom attribute group are specific to a storefront site's implementation.

Preview

Once you have created the category, you can view the category's title on the storefront using the preview icon. Later, you will fill the category with products.



Practice: Create a Category

1. Create a category under the *Womens* category.
 - Use your name in the **ID** field.
 - Leave the **online from** and **online to** blank.
 - Add SEO.
 - Remember to check the **Show in Menu Navigation** box.
2. Does the category name appear in the menu on the storefront?
3. Does the page title appear at the top of the storefront window?



Lesson 2.2: Sorting Categories

You can modify the order of categories to create an optimal taxonomy.

Example: You have a very large shoe selection that includes a subcategory for sandals and a subcategory for boots. As warmer weather approaches, you decide that you want to merchandise the sandals by positioning that category more prominently on the storefront.

To sort categories:

1. Select all the categories to include into the new display sequence.
2. Click **Sort** and arrows display in the sorting column.
3. Click the appropriate arrows to change the order.
4. Preview in the storefront.

Use the four arrows to sort or move categories:



- Moves the category to the top
- Moves the category up one level
- Moves the category down one level
- Moves the category to the bottom

Note: A new created category is not included in the sorted categories. It is unsorted, as indicated by the white background color. To include it, click **Select All** and then **Sort**.

Catalogs > Storefront Catalog - EN > Mens

Mens

Edit

Categories

These are the sub-categories of the current category. To change the order of the sorted categories, use the up and down buttons to move selected categories. To add a category to the list of sorted categories, select the category and use the Sort button.

Select All	ID	Name	Description	Status	View	Sorting
<input type="checkbox"/>	mens-clothing	Clothing		<input type="radio"/>	Edit	
<input type="checkbox"/>	mens-accessories	Accessories		<input type="radio"/>	Edit	

Edit All **Edit Selected** **Sort** **Unsort** **New** **Copy** **Delete**

Showing 1 - 2 of 2 items.



Guided Practice: Sort Categories

1. You have reviewed and analyzed the reports for the Men's category. You have found that most people are interested in clothing within the Men's category.
 2. Change the order of the categories so that the mens-clothing sub-category is listed first.
 3. If mens-clothing is taken, other categories to sort include:
 - mens, womens, mens-clothing, mens-accessories, womens-clothing, womens-jewelry, womens-accessories, new-arrivals, electronics
- Note:** Categories are changed immediately, you do not need to click **Apply**.
4. View the result on the storefront.



Lesson 2.3: Editing Category Configuration

On each category screen, there are two kinds of editing – one for the main category, and one for each subcategory:

Select All	ID	Name	Description	Status	View	Sorting
<input type="checkbox"/>	mens-clothing	Clothing		<input checked="" type="radio"/>		
<input type="checkbox"/>	mens-accessories	Accessories		<input checked="" type="radio"/>		

Showing 1 - 2 of 2 items.

When you click **Edit**, Business Manager displays the corresponding tabs and setting options.



Lesson 2.4: Copying a Category

You can copy a category instead of creating a new category. You can then modify the copy by changing its name and adding or removing assigned products.

The duplicate of the original category can be modified by changing the name and adding and/or removing assigned products.

When you copy a category, you must select one of the following copy methods:

- Copy category without product assignments
- Copy category with product assignments
- Copy category and sub-categories without product assignments
- Copy category and sub-categories with product assignments

You may have a category where some of the assigned products will be put on sale. You want to keep all the products in the main category, but you also want the products on sale to be moved to a new sales category.

Solution: You can copy the original category with all the products and move the category and products to sales. Enter the new sales category and remove the products that you do not want to put on sale.

To copy a category:

1. Select the category that you want to copy.
2. Click **Copy**.

Select All	ID	Name	Description	Status	View	Sorting
<input checked="" type="checkbox"/>	mens-clothing-suits	Suits		<input type="radio"/>	Edit	
<input type="checkbox"/>	mens-clothing-jackets	Jackets & Coats		<input type="radio"/>	Edit	
<input type="checkbox"/>	mens-clothing-dress-shirts	Dress Shirts		<input type="radio"/>	Edit	
<input type="checkbox"/>	mens-clothing-shorts	Shorts		<input type="radio"/>	Edit	
<input type="checkbox"/>	mens-clothing-pants	Pants		<input type="radio"/>	Edit	

3. Select the copy method.

- Click **OK** and notice that the copy is “offline” and has a unique ID where “-1” has been appended to the ID of the original category.



Lesson 2.5: Moving a Category

You can move storefront categories from one location to another. Think of a seasonal category, for example, swim suits. At the end of the season, this category should be moved to a clearance category. Maybe you want to assign a new name to the category and move it to a different location inside your category tree.

To move a category:

1. Go to **Merchant Tools > Products and Catalogs > Catalogs**.
 2. Select the respective catalog.
 3. Click **Edit** for the respective category.
 4. Optional: On the **General** tab, change the name of the category.
 5. Next to the **Parent Category ID**, click **Select**. The system displays a list of categories.
 6. Choose the one under which you want to nest your category.
 7. Click **Apply**.

Merchant Tools > Products and Catalogs > Catalogs > Storefront Catalog - EN > Mens > Clothing > Suits

General Category Attributes Product Attribute Definitions Search Refinement Definitions Sorting Rule 

Suits

Fields marked with a red asterisk (*) are mandatory.

Select Language:	English 
Category ID:*	mens-clothing-suits
Online:	<input checked="" type="checkbox"/>
Online From:	<input type="text"/> MM/dd/yyyy  <input type="text"/> h:mm a
Online To:	<input type="text"/> MM/dd/yyyy  <input type="text"/> h:mm a
<input checked="" type="radio"/> Name:	Suits
<input type="radio"/> Description:	<input type="text"/>
Parent Category ID:	mens-clothing 
URL:	http://[HOST]/mens/clothing/suits/

Apply **Reset** **Copy** **Delete**



Knowledge Check

1. Do you use the same method to move and to copy a category?
2. How can you change the order of categories?
3. Do you need to click **Apply** after you copy categories?
4. What are the steps to remove a sub-category from a category and add a new one?



Best Practices

- Populate Search Engine Optimization (SEO) for categories.
- Keep categories offline until they are complete.
- Avoid making changes in production. Create and test changes in Staging.

Module 3: Products

Objectives

Upon completion of this module, you will be able to:

- Search products
- Add, edit and delete products
- Use the storefront toolkit
- Assign products to a category, move products, copy products
- Manage product attributes
- Manage variation masters and variation products
- Create product sets and bundles
- Implement product management best practices

Overview

Although you can create products in Demandware, often products and product attribute data are imported into Demandware on a schedule. This can be done automatically from a feed that is scheduled to take place overnight. Once imported, you can view products or modify them as appropriate to enhance the customer experience. For example, you can:

- Add products (i.e. create product sets)
- Update product descriptions
- Add images
- Tune Search Engine Optimization (SEO) attributes



Lesson 3.1: Searching for Products

There are multiple methods to search for products in Business Manager:

- **Simple search** when you know the product name, part of the product name, the ID, or part of the ID. Leaving it blank will return all products.
- **By ID search** can find multiple products by ID. IDs can be pasted into this field as a list separated by commas, spaces/tabs, or new lines.
- **Advanced search** to narrow results by attributes, catalog, status and/or product type. The asterisk (*) can be used as a wildcard.
- **Example:** *shirt will match t-shirt and tee-shirt and nightshirt

- **Example:** sweat* will match: sweatshirt and sweatpants and sweater
- **Example:** *ear* will match: clear and earring

The search results can be ordered alphabetically and can handle attributes. Additional columns can be added to the list of results for all users. The results list uses the following icons to show status: online/offline, in-stock, searchable, and categorized.

Product Search											Simple	Advanced	By ID
											<input type="text"/>	<input type="button" value="Find"/>	
Select All	ID	Name	Catalog	Color	Online	Brand	Type	Status	View				
<input type="checkbox"/>	008884303989	Platinum Blue Stripes Easy Care Fitted Shirt [Color: White / Size: 10]	Apparel Master Catalog	JJV61XX	false		Variation Product Part of Product Set						
<input type="checkbox"/>	008884303996	Platinum Blue Stripes Easy Care Fitted Shirt [Color: White / Size: 12]	Apparel Master Catalog	JJV61XX	true		Variation Product Part of Product Set						



Practice: Search for Products

1. Try a *Simple* search.
2. Try a *By ID* search.
3. Try *Advanced* search:
 - a. Find all products that start with “s”.
 - b. Find all products that end with “ing”.
 - c. Find all golden products that have the color code JJ887XX.
 - d. Find all Variation Masters and order the results alphabetically by name.



Lesson 3.2: Creating a Product

In Business Manager, there are two ways to find products:

- To view the entire list of products, go to Merchant Tools > **Products and Catalogs** > **Products**.
- To view the products that have been assigned to a category, go to: **Merchant Tools** > **Products and Catalogs** > **Catalogs** > {category}.

To add a product:

1. Go to **Merchant Tools** > **Products and Catalogs** > **Products**.
2. Click **New**.
3. Set **Select language** to Default. This is also called the locale and allows each product to have attributes stored in multiple spoken languages.

Example: For a single product, the attribute called “Description” could contain *all* of these:

- “These are classic shoes” in Default
 - “Diese sind klassische Schuhe” when “Select language” is set to German
 - “Ce sont les chaussures classiques” when “Select language” is set to French
4. Enter an **ID** and a **Name** for the new product. The ID must be unique.
 5. Mark it as online and searchable.
 - **Online/Offline:** You can specify dates for when the customer can view and purchase this product.
 - **Searchable:** Controls whether or not a product is included in the search index.
 - Click **Apply**. The other tabs will be enabled.



Demonstration: Language Selection

Demonstrate language selection by changing a single attribute called, “Description” to contain all of these:

- “These are classic shoes” in Default
- “Diese sind klassische Schuhe” in German
- “Ce sont les chaussures classiques” in French

New Product

Fields with a red asterisk (*) are mandatory. Click Apply to save the details. Click Cancel to stop everything and go back to the list. You can enter information in other languages if required.

Select language:	Default
ID:	P2747324
Catalog:	apparel-catalog
Tax Class:	Undefined
Online:	Yes
Online From:	MM/dd/yyyy : h:mm a
Online To:	MM/dd/yyyy : h:mm a
Searchable:	Yes
In Stock:	Yes
Name:	Angora Sweater
Brand:	
Manufacturer:	
Manufacturer Product ID:	
Description:	

Editing Product SEO

You can apply SEO to a product as well as a category. SEO is frequently applied to hero or best selling products to make them accessible from a search engine.

To edit SEO:

1. Edit the product.
2. In the **General** tab, scroll to the Search Engine Optimization Support section. Enter the page title, description and keywords. Note: A good Page Description is important.

3. Click **Apply**.



Demonstration: Page Source

View the page source including the title and meta-tags.



Practice: Create a Product

1. Create a product with your first name in the fields: ID and Name.
2. Mark the product as online and searchable.
3. Select the **Categories** tab and put a check mark next to your category.
4. View your product on the storefront.

Editing a Product

Search for the product that you would like to edit and click the product's ID or name link.

Site Genesis - Products

Select Simple to search for products by ID or name, Advanced to specify more search fields and sorting criteria, or By ID to display a list of product IDs.
Simple searches are case-sensitive. You can use an asterisk (*) to find matching strings.
See [Product Preferences](#) to add columns to this page and all other product lists.

Product Search									Simple	Advanced	By ID	
Name or ID:			Find	Catalog	Color	Refinement Color	Type	Status	View			
Select All	ID	Name										
<input type="checkbox"/>	008*	-		apparel-catalog			Product					
<input type="checkbox"/>	008884303989	Platinum Blue Stripes Easy Care Fitted Shirt [Color: White / Size: 10]		apparel-catalog	JJV61XX	White	Variation Product					
<input type="checkbox"/>	008884303996	Platinum Blue Stripes Easy Care Fitted Shirt [Color: White / Size: 12]		apparel-catalog	JJV61XX	White	Variation Product					

Locking Products

Locking a product gives a Business Manager user exclusive access to edit that product and its variations. By default, the lock expires in an hour. The user must lock the product before submitting changes via the **Apply** button.

Take a Product Offline

If there is any reason that a product is not ready to be sold, you should take it offline.

To take a product offline:

1. Search for the product that you would like to change.
2. Edit the **master** of the product.
3. Lock the product.
4. Set **Online** to No.



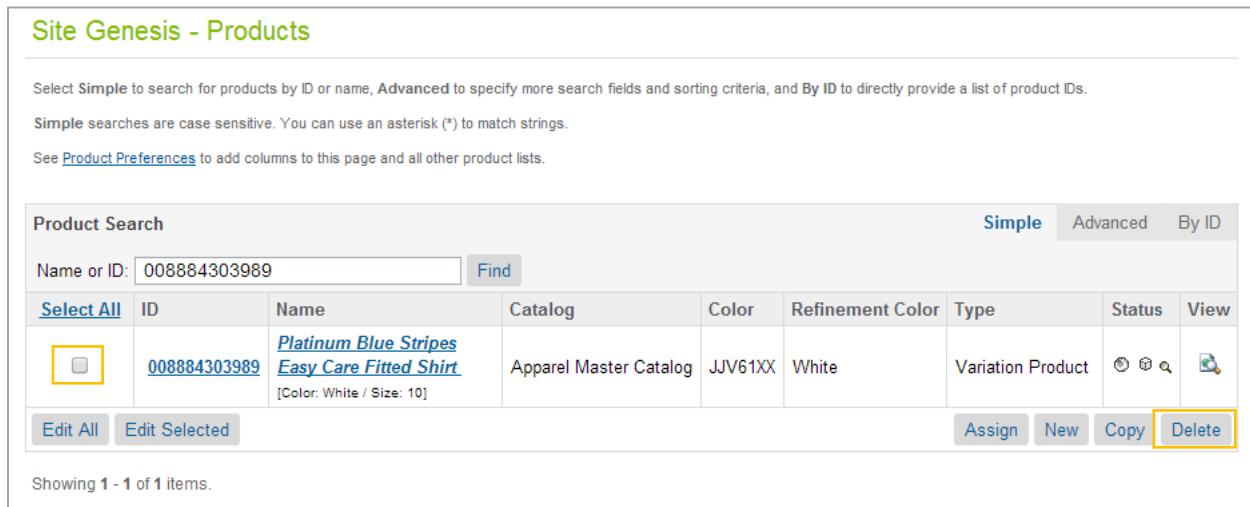
5. Click **Apply**.

Delete vs. Offline vs. Unassign

Deleting a product removes it completely, while setting it to offline only removes it from the storefront but does not remove it from the catalog. However, removing the assignment of a product to a category removes the product from being displayed in that category on the storefront. For example, if a product is in both the Men's category and the Sale category, you can unassign it from the Sale category, while still keeping it in the Men's category.

To delete a product:

1. Go to **Merchant Tools > Products and Catalogs > Products**.
2. Select the product using the check box on the left.
3. Click **Delete**.



Product Search									Simple	Advanced	By ID				
Name or ID: <input type="text" value="008884303989"/> <input type="button" value="Find"/>															
Select All	ID	Name	Catalog	Color	Refinement Color	Type	Status	View							
<input checked="" type="checkbox"/>	008884303989	Platinum Blue Stripes Easy Care Fitted Shirt [Color: White / Size: 10]	Apparel Master Catalog	JJV61XX	White	Variation Product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="button" value="Edit All"/>	<input type="button" value="Edit Selected"/>	<input type="button" value="Assign"/>	<input type="button" value="New"/>	<input type="button" value="Copy"/>	<input type="button" value="Delete"/>

Showing 1 - 1 of 1 items.

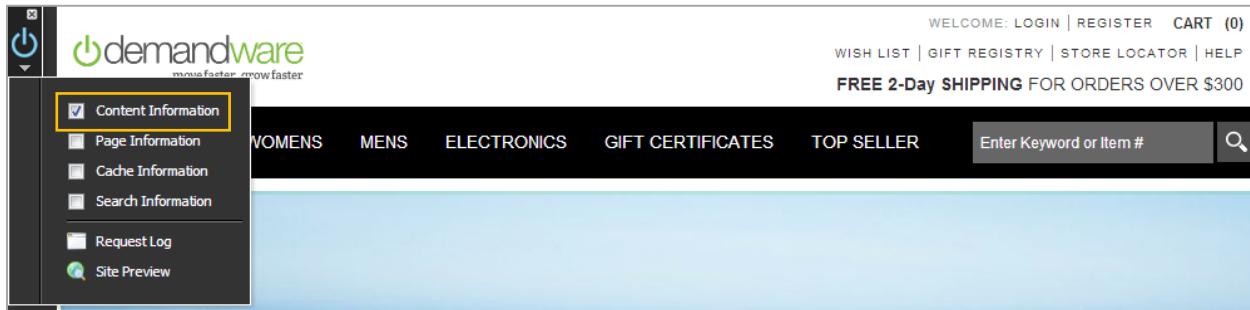
4. Business Manager prompts you to confirm the deletion. Click **Ok**.



Lesson 3.3: Using the Storefront Toolkit

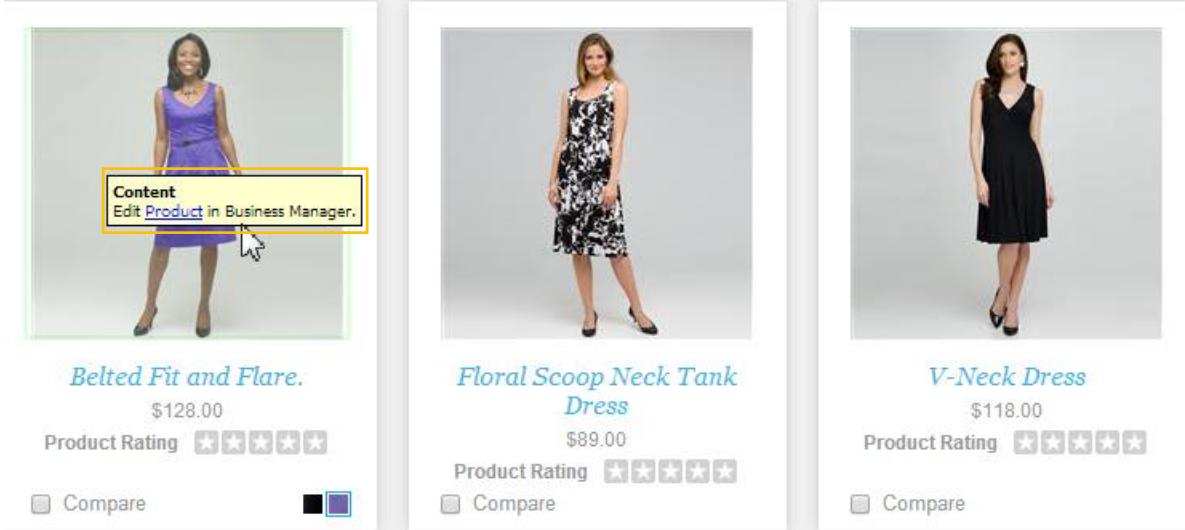
The storefront toolkit enables you to jump directly into edit mode for a product in Business Manager. It is located on the top left corner of your storefront. **Note:** It is available on every instance except Production.

To view information on products, check **Content Information**:



A screenshot of a Demandware storefront. On the left, a vertical toolbar (the "Storefront Toolkit") is open, showing several options: Content Information (which is checked and highlighted with a yellow box), Page Information, Cache Information, Search Information, Request Log, and Site Preview. At the top right, there are links for Welcome, Login, Register, Cart (0), Wish List, Gift Registry, Store Locator, and Help. Below that, a banner says "FREE 2-Day SHIPPING FOR ORDERS OVER \$300". The main navigation bar includes categories like WOMENS, MENS, ELECTRONICS, GIFT CERTIFICATES, and TOP SELLER. A search bar at the top right contains the placeholder "Enter Keyword or Item #".

To jump into Business Manager, navigate to a specific product screen, hover over any product in the product list page. It will turn green. Click the [Product](#) link.



A screenshot of a product list page featuring three women's dresses. The first dress, a purple belt-and-flare style, has a callout box highlighting the "Content" link, which is described as "Edit Product in Business Manager." The second dress, a black and white floral scoop-neck tank dress, and the third dress, a simple black V-neck dress, are also shown with their respective details: price (\$128.00, \$89.00, \$118.00), product rating (4.5 stars), and compare links.

Product	Price	Rating	Action
Belted Fit and Flare	\$128.00	4.5	Compare
Floral Scoop Neck Tank Dress	\$89.00	4.5	Compare
V-Neck Dress	\$118.00	4.5	Compare

To disable content information and remove the check mark press the <ESC> key.

Choosing a Category While Editing a Product

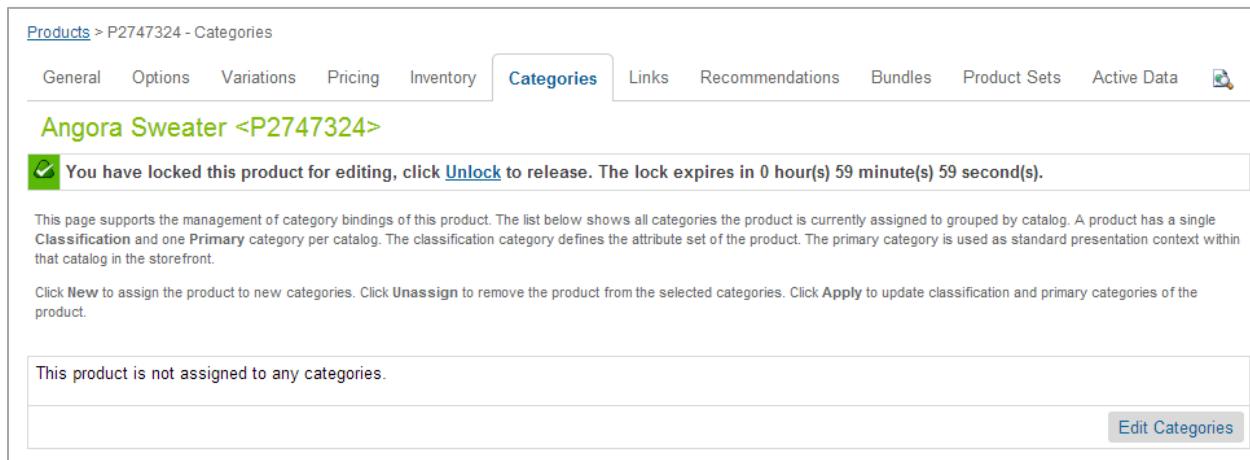
When assigning product to one or more categories, use the **Categories** tab to identify the classification and the primary categories.

- Classification category defines the attribute set of the product.
- Primary category defines which category a product should appear in when accessed via search. It does not affect the category navigation hierarchy (the “home” of the product).

Example: You could assign a new product to multiple categories (such as, New Arrivals, Sale, Kids Shoes). The classification category would be **Kids Shoes** providing shoe attributes while the **Sale** category would be the primary category for people who search.

To change a category while editing a product:

1. Edit the product.
2. Click **Edit Categories** to assign the product to a certain category.



Products > P2747324 - Categories

General Options Variations Pricing Inventory Categories Links Recommendations Bundles Product Sets Active Data 

Angora Sweater <P2747324>

You have locked this product for editing, click [Unlock](#) to release. The lock expires in 0 hour(s) 59 minute(s) 59 second(s).

This page supports the management of category bindings of this product. The list below shows all categories the product is currently assigned to grouped by catalog. A product has a single Classification and one Primary category per catalog. The classification category defines the attribute set of the product. The primary category is used as standard presentation context within that catalog in the storefront.

Click [New](#) to assign the product to new categories. Click [Unassign](#) to remove the product from the selected categories. Click [Apply](#) to update classification and primary categories of the product.

This product is not assigned to any categories.

[Edit Categories](#)



Lesson 3.4: Assigning Multiple Products to a Category

You can assign products to categories manually, through the feed or in bulk.

As trends change you can assign, move, or copy products to other categories. For example, seasonal products are often moved to Sale or Clearance categories.

To assign multiple products to a category via the category:

1. Go to a category and click **Assign**.
2. Select the products to add to the category.

To assign multiple products to a category via the products:

1. Go to **Merchant Tools > Products and Categories > Products**.
2. Select the products to assign to a category.
3. Click **Assign**.
4. Select the category to receive the product assignments. Click **Assign**.

Product Search									Simple	Advanced	By ID
Name or ID: long sleeve shirt											
Select All	ID	Name	Catalog	Color	Refinement Color	Type	Status	View			
<input checked="" type="checkbox"/>	25518344	Pleated Bib Long Sleeve Shirt	Apparel Master Catalog			Variation Master					
<input checked="" type="checkbox"/>	25518944	Long Sleeve Shirt With Twist Detail	Apparel Master Catalog			Variation Master					
<input type="checkbox"/>	25565563	Relaxed Long Sleeve Shirt	Apparel Master Catalog			Variation Master					

5. Choose the categories that should contain the products selected and click **Next >>**.

Step 2: Assign Products to Catalog Category - Select one or more Categories

Step 2 of 3. Next Step: Confirm selected catalog and category to start the product assignment process.

storefront-catalog-en (Storefront Catalog - EN)

Find:

storefront-catalog-en (Storefront Catalog - EN)

- newarrivals (New Arrivals)
- womens (Womens)
- mens (Mens)
- electronics (Electronics)
- gift-certificates (Gift Certificates)
- top-seller (Top Seller) [1]
- hidden (Hidden Category)

6. Specify the primary and classification categories.

Step 3: Assign Products to Catalog Category - Confirmation

This product processing action will assign all products contained in the current search result to the selected catalog category.

It is possible to specify Classification and Primary category. The classification category defines the attribute set of the product. The primary category is used as standard presentation context within that catalog in the storefront.

Click **Finish** to start this action, click **Cancel** to abort.

Selected Catalog: storefront-catalog-en

Selected Categories: mens (Mens), top-seller (Top Seller)

Classification Category:

Primary Category:

7. Click either **Finish: Return to Products** or **Finish: Go to Batch Process**.



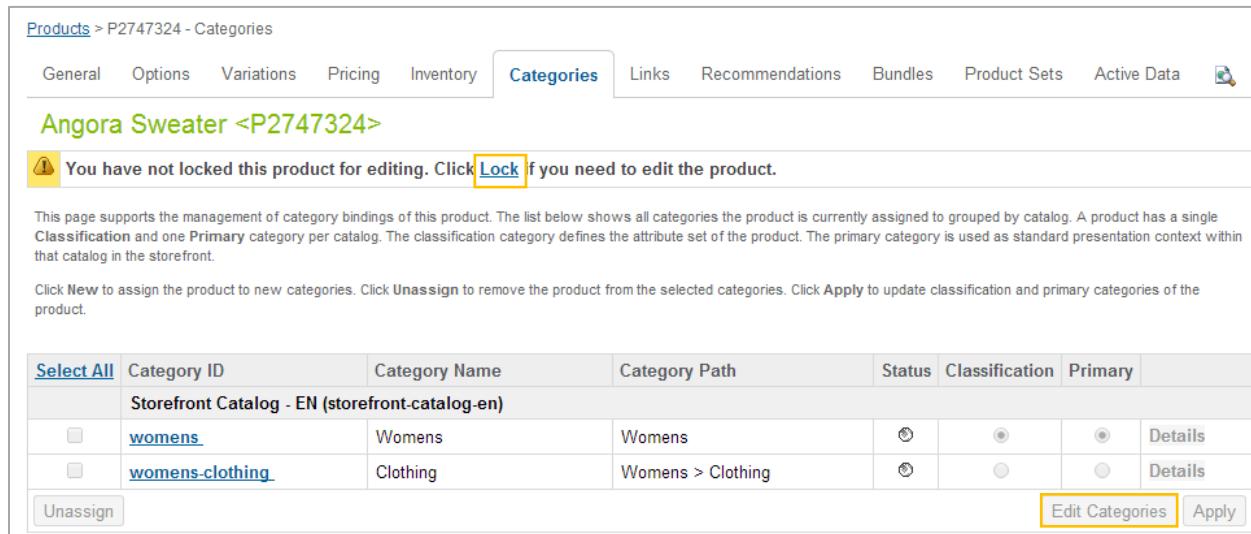
Practice: Assign Products to a Category

1. Assign the product you created earlier to your category.
2. Select additional *master* products and assign them to your category.

3. View your category in the storefront.

Moving Products From One Category to Another

1. Go to **Merchant Tools > Products and Categories > Products**.
2. Select a product.
3. Select the **Categories** tab.
4. Lock the product and click **Edit Categories**.



[Products](#) > P2747324 - Categories

General Options Variations Pricing Inventory Categories Links Recommendations Bundles Product Sets Active Data

Angora Sweater <P2747324>

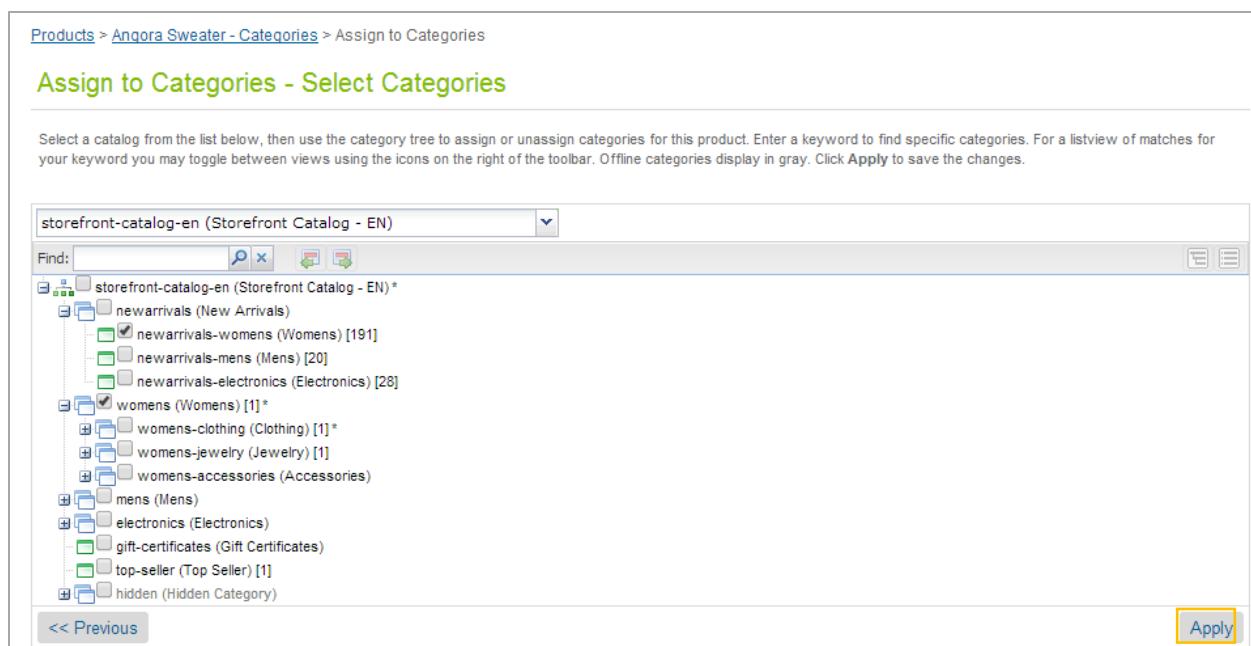
! You have not locked this product for editing. Click **Lock** if you need to edit the product.

This page supports the management of category bindings of this product. The list below shows all categories the product is currently assigned to grouped by catalog. A product has a single Classification and one Primary category per catalog. The classification category defines the attribute set of the product. The primary category is used as standard presentation context within that catalog in the storefront.

Click **New** to assign the product to new categories. Click **Unassign** to remove the product from the selected categories. Click **Apply** to update classification and primary categories of the product.

Select All	Category ID	Category Name	Category Path	Status	Classification	Primary	
Storefront Catalog - EN (storefront-catalog-en)							
<input type="checkbox"/>	womens	Womens	Womens	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Details
<input type="checkbox"/>	womens-clothing	Clothing	Womens > Clothing	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Details
<input type="button" value="Unassign"/> <input type="button" value="Edit Categories"/> <input type="button" value="Apply"/>							

5. In the category tree, uncheck the current category, select one or more new categories. Click **Apply**.



[Products](#) > [Angora Sweater - Categories](#) > Assign to Categories

Assign to Categories - Select Categories

Select a catalog from the list below, then use the category tree to assign or unassign categories for this product. Enter a keyword to find specific categories. For a listview of matches for your keyword you may toggle between views using the icons on the right of the toolbar. Offline categories display in gray. Click **Apply** to save the changes.

storefront-catalog-en (Storefront Catalog - EN)
Find: <input type="text"/> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> storefront-catalog-en (Storefront Catalog - EN) * <input type="checkbox"/> newarrivals (New Arrivals) <ul style="list-style-type: none"> <input checked="" type="checkbox"/> newarrivals-womens (Womens) [191] <input type="checkbox"/> newarrivals-mens (Mens) [20] <input type="checkbox"/> newarrivals-electronics (Electronics) [28] <input type="checkbox"/> womens (Womens) [1] * <ul style="list-style-type: none"> <input type="checkbox"/> womens-clothing (Clothing) [1] * <input type="checkbox"/> womens-jewelry (Jewelry) [1] <input type="checkbox"/> womens-accessories (Accessories) <input type="checkbox"/> mens (Mens) <ul style="list-style-type: none"> <input type="checkbox"/> electronics (Electronics) <input type="checkbox"/> gift-certificates (Gift Certificates) <input type="checkbox"/> top-seller (Top Seller) [1] <input type="checkbox"/> hidden (Hidden Category)
<input type="button" value="<< Previous"/> <input type="button" value="Apply"/>



Practice: Move a Product to Another Category

At the end of the season a product is moves to the clearance category.

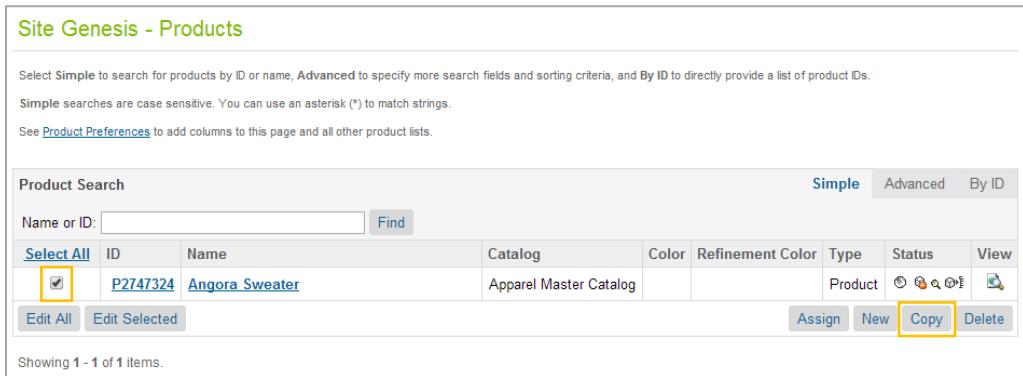
1. Select a product from another category.
2. Move it into your category (as if your category was the clearance category).
3. Preview your category on the storefront.



Lesson 3.5: Copying Products

You can copy a product. For example, create a deluxe product based on a standard product.

1. Go to **Merchant Tools > Products and Catalogs > Products**.
2. Select the product to copy and click **Copy**.



The screenshot shows a search interface for products. At the top, there are tabs for 'Simple', 'Advanced', and 'By ID'. Below the tabs is a search bar labeled 'Name or ID:' with a 'Find' button. Underneath the search bar is a table with columns: Select All, ID, Name, Catalog, Color, Refinement Color, Type, Status, and View. A single row is selected, showing ID P2747324 and Name Angora Sweater. In the bottom right corner of the table area, there are buttons for Assign, New, Copy (which is highlighted with a yellow box), and Delete.

3. Select the copy options to determine the features you want to copy.
4. Click **Finish**. Notice that the new product ID has “-1” at the end of the product ID to make the ID unique. But, you can create a new SKU for that product as appropriate.



Practice: Copy a Product

1. Create a copy of your product.
2. Notice that the ID has changed on the copy and that the copy has been placed offline.

Bulk Edit

Bulk edit enables the editing of multiple products simultaneously to save time.

1. Use product search to display a list of products. **Note:** Instead you could go to a category that contains products.
2. Select the products to bulk edit using the check boxes or Select All.
3. Click **Edit Selected**.



Note: **Edit All** enables you to bulk edit the entire list products found in your search—not just the ones that are visible on the first page.

4. Choose one of the following actions

Action	Description
Update/Delete Product Attributes	Changes attribute values in bulk. Use this to change multiple products from “Red” to “Brick Red.”
Assign Products to Catalog Category	Multiple products can be assigned to a category.
Unassign Products from Catalog Categories	Removes products that have been assigned to a category.
Copy Products	Copies products within the same category.
Delete Products	Deletes many products at once.
Modify Prices	Modifies the prices of multiple products simultaneously.

5. Click **Next>>**.



Demonstration: Use Bulk Edit

Use bulk edit to change the color of multiple products at once.



Practice: Bulk Edit

1. Choose your products such as: shirt, pant, glove, dress, bracelet, suit, jacket, or earring.
2. Use bulk edit to change the color to “Burgundy,” “Jade,” “Ivory” or “Cyan.”
3. The color should display in the search results.



Lesson 3.6: Managing Product Attributes

Some clients have hundreds of product attributes. You can define attributes at different levels. Products inherit their attributes from the catalog; however, they can be overridden at any level.

To view product attribute definitions by category:

1. Go to **Products and Catalogs > {catalog} > {category} > Product Attributes Definition tab**

Usually, you define the most generic attributes at the catalog level, and get more specific in the categories.

Product Attributes	Inherited by	Examples
Product System Object Level	All products	Name, Long Description, HTML Page Title
Category Level	All products assigned to the category	TVs: diagonal, brightness, resolution Shoes: color, size, heel height
Catalog Level	All products assigned to the catalog	Electronics catalog includes height, depth, width while the Apparel catalog does not

Custom Attributes

You can create custom attributes to suit the needs of your storefront site. You should understand the use of custom attributes in your storefront and the maintenance responsibilities of filling in relevant attribute data. An Administrator or Developer can add custom attributes.

To add a custom attribute:

1. Go to **Administration > Site Development > System Object Definitions > Object > Attribute Definitions tab**. Click **New**.
2. Once the attribute has been added, you may add it to an attribute group.



Lesson 3.7: Managing Variation Masters and Variation Products

Use variation masters to display a product in the product listing page and the variation products are the SKUs with specific variations (like size and color) that are purchased by the customer:

Variation Master	Variation Products

Has <u>no values</u> for the varying attributes (like color, size)	Have <u>values</u> for the varying attributes (like color, size)
Has <u>no SKU</u> , and cannot be bought by the customer	Have a <u>SKU</u> and can be bought by a customer with a <u>price</u>
Determines the attributes	Inherit their attributes

Example: This is a variation master:

Men's Cord Blazer

~~\$120.00~~ | **\$108.00**

Color: British Khaki



Item# 883239054422

Size: M

S M L XL XXL

[Size Chart](#)

Availability: In Stock

\$108.00 | **\$108.00**

QTY: 1 [Add to Cart](#)

[Read Reviews](#) | [Write a Review](#)

[Add to Wishlist](#)

[Add to Gift Registry](#)

[Send to a Friend](#)

[Description](#) [Product Details](#) [Reviews](#)

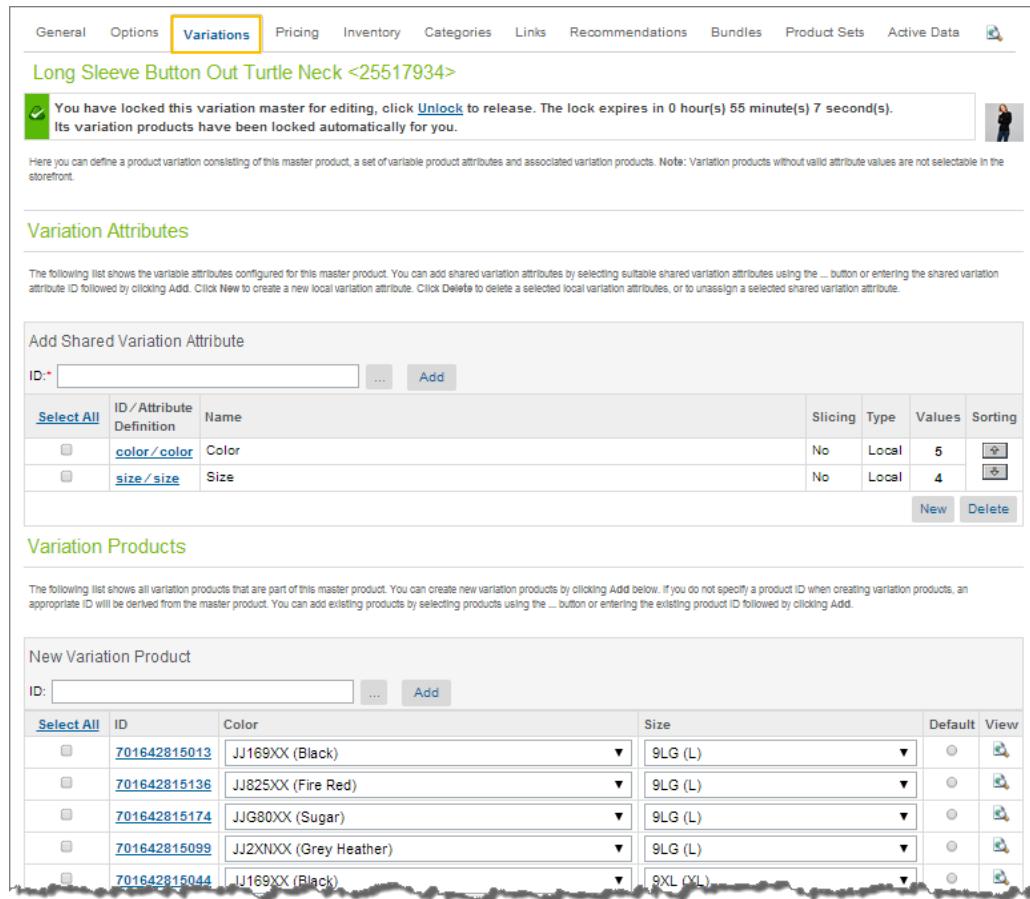
Layer this blazer over a woven shirt and sweater for a traditional look or over a t-shirt for a rugged casual look. [Print](#)

Example: These variation products correspond to the variation master.



In this example, the highlighted product is size XL and the color is British Khaki. Each variation product has a SKU and can have an individual price, inventory, and promotions.

To manage the assignment of variation products to variation master products, use the **Variations** tab.



Variation Attributes

The following list shows the variable attributes configured for this master product. You can add shared variation attributes by selecting suitable shared variation attributes using the ... button or entering the shared variation attribute ID followed by clicking Add. Click New to create a new local variation attribute. Click Delete to delete a selected local variation attribute, or to unassign a selected shared variation attribute.

Add Shared Variation Attribute						
ID*	ID / Attribute Definition		Name	Slicing	Type	Values
<input type="text"/>	<input type="button" value="..."/>	<input type="button" value="Add"/>		No	Local	5
	<input checked="" type="checkbox"/>	color/color	Color	No	Local	4
	<input checked="" type="checkbox"/>	size/size	Size			

Variation Products

The following list shows all variation products that are part of this master product. You can create new variation products by clicking Add below. If you do not specify a product ID when creating variation products, an appropriate ID will be derived from the master product. You can add existing products by selecting products using the ... button or entering the existing product ID followed by clicking Add.

New Variation Product						
ID:	Color		Size	Default	View	
<input type="text"/>	<input type="button" value="..."/>	<input type="button" value="Add"/>				
	<input checked="" type="checkbox"/>	701642815013	JJ169XX (Black)	9LG (L)	<input type="radio"/>	
	<input checked="" type="checkbox"/>	701642815136	JJ825XX (Fire Red)	9LG (L)	<input type="radio"/>	
	<input checked="" type="checkbox"/>	701642815174	JJG80XX (Sugar)	9LG (L)	<input type="radio"/>	
	<input checked="" type="checkbox"/>	701642815099	JJ2XNXX (Grey Heather)	9LG (L)	<input type="radio"/>	
	<input checked="" type="checkbox"/>	701642815044	JJ169XX (Black)	9XL (XL)	<input type="radio"/>	

Notice that this product contains two attributes, color and size. It also lists the variations. The first one is Black in size 9LG (L).

Attaching Variation Products to a Variation Master

Most systems import products with the variation products already assigned to a variation master. Some systems require that you create the variation master then attach the variation products to it.

To attach a variation product to a variation master:

1. If it doesn't exist already, create a variation master.
2. Lock it.
3. Select the **Variations** tab.
4. Scroll to the **New Variation Product** section.
5. Select the variation product to add to the variation master.
6. Click **Add**.

Selecting a Default Variation Product

Select one of the variation products as the default by clicking on the variation and selecting the radio button. That variation displays in the search results and on the product detail page.

Product Slicing

Merchants can control how variation products display within navigation and search results using the *slicing attribute* functionality. Use slicing to fill up a category. For example, if you slice a product by color, every color displays in the search results as a separate result – otherwise, the default color displays on the master. The same option exists for all varying attributes.

Unsliced: Merchant shows a single product on the product listing page with color swatches on the PDP



Sliced: Merchant shows a separate product for each color, while still grouping by size



Example: A site offers heavy weight rugby jerseys with different colors and designs for each country. They might slice by color so their customers can see each design on the product listing page.

Note: A sliced product is sliced in all categories.

To slice a product by a certain attribute:

1. Go to **Merchant Tools > Products and Catalogs > Products > {selected product} > Variations tab.**
2. In the **Variation Attributes** section, click the attribute to slice.
3. Check the **Slicing Attribute** box.
4. Click **Apply**.



Lesson 3.8 Using Product Sets

A product set is a group of related products presented together. It is sometimes known as a Merchandizing Set, Retail Set, or Promotion Set. You can display product sets in a category to create a “look book” with images that display how the products are related to each other. For example, a product set could contain a sweater, pants and shoes. Customer can purchase each product separately.

Spring Look

\$226.99

Long Sleeve Raglan Button Out Turtle Neck

Availability: In Stock

COLOR: Fire Red Multi

SIZE: S M L XL L (Size Chart)

QTY: 1 \$79.00 \$38.99 ADD TO CART

Trouser Leg Pant

Availability: In Stock

COLOR: Chino

SIZE: S M L XL (Size Chart)

QTY: 1 \$89.00 ADD TO CART

Zacco

Availability: In Stock

COLOR: Black

SIZE: S 5.5 7 7.5 8 8.5 9 9.5 10 10.5

WIDTH: M (M)

QTY: 1 \$99.00 ADD TO CART

Total: \$226.99 **ADD ALL TO CART**

A product set:

- Contains multiple products that customers can purchase individually
- Each product in the set has its own individual SKU and price
- Is not a product itself – the set cannot be ordered and does not have a price
- Can have its own display attributes such as name, images, and merchandising links to other products or product sets
- Can be assigned to multiple categories
- Has a primary category assignment – if a Product Set is in multiple categories, this assignment enables you to identify which category should result from a successful search for this product set

To find product sets use either: Advanced Search or go to **Merchant Tools > Products & Catalogs > Product Sets**.

Product Sets

Site Genesis - Product Sets

Select Simple to search for product sets by ID or name. Advanced to specify more search fields and sorting criteria, and By ID to specify a list of product set IDs separated by commas, semicolons, or colons. For Simple and Advanced searches, you can use an asterisk (*) to match strings.

See [Product Preferences](#) to add columns to this page and all other product lists.

Product Search								Simple	Advanced	By ID	
Name or ID:			Find	Catalog	Color	Refinement Color	Status	View			
Select All	ID	Name									
<input type="checkbox"/>	Spring-look-2	Spring Has Sprung		Apparel Master Catalog							
<input type="checkbox"/>	SpringLooks	Spring Look		Apparel Master Catalog							
<input type="checkbox"/>	fall-look	Fall Look		Apparel Master Catalog							
<input type="checkbox"/>	spring-look	Spring Look		Apparel Master Catalog							
<input type="checkbox"/>	winter-look	Winter Look		Apparel Master Catalog							

[Assign](#) [New](#) [Delete](#)

To check if a single product is part of a set, use the **Product Sets** tab inside the product itself.

Products > 25565826 - General

[General](#) Options Variations Pricing Inventory Categories Links Recommendations Bundles [Product Sets](#) Active Data

Scoop Neck Tee With Applique <25565826>

You have not locked this product for editing. Click [Lock](#) if you need to edit the product.

To create a product set:

1. Go to **Merchant Tools > Products & Catalogs > Product Sets**.
2. Click **New**.
3. Fill in the required fields.
4. Click **Apply**.
5. Select the **Product** tab.
6. Click **New** to add products to the set.
7. Choose the products to add.
8. Click **OK**.



Practice: Create a Product Set

1. How do you offer a coordinated outfit that includes sweater, pants, and a necklace? You want to allow your customers to buy each product separately.
2. Create a product set.
3. Place it into your category.
4. Preview the product set on the storefront.

Example: You can create a look book by inserting a number of product sets into a category.



Lesson 3.9 Product Bundles

A bundle is a separate product with its own SKU and price that combines the offering of multiple products for one price. To view them go to **Merchant Tools > Products and Catalogs > Products > Advanced Search**

A bundle can include products of different types: master products with variations, even other bundles. You manage the bundle's attributes within the bundle product, while you manage the attributes for the included products within the products themselves.

Example: Creating a promotion for the Warhawk game will not change the 449.99 price for the Playstation 3 Bundle.

Promotions applied to bundled products do not affect price of individual products contained with the bundle if purchased separately.

Example: Creating a promotion for the Playstation 3 Bundle will not affect the price of the Warhawk game.

To create a new product bundle:

1. Create a new standard product without variations.
2. Go to the **Bundles** tab inside of this product.
3. Click **New** to add products to this bundle.
4. Select some products and click **OK**.
5. Sort the products if necessary.
6. Preview the bundle on the storefront.



Practice: Create a Product Bundle

1. Create a complete outfit that includes a sweater, a pair of pants, and a necklace at one fixed price.
2. View it on the storefront.



Best Practices

- Populate Search Engine Optimization (SEO) attributes for products and categories. If you have limited time or resources, at least do this for the top selling products.
- Pay particular attention to SEO and descriptions on product pages since they entice customers to purchase.



Knowledge Check

1. You notice that two product names and a product description are spelled incorrectly in production. How do you fix them immediately?
2. You have reviewed the analytics reports and determined that a certain term is being searched externally from Google. This term is relevant to a specific product. How do you update the page title, description, and keywords for the product?
3. How do you change the category where a product appears when returned by the on-site storefront search results?
4. What do you do if a product set does not show up on the storefront?
5. Can multiple categories contain the same product?
6. What is the difference between un-assigning a product and deleting it?
7. How do you take a product off your storefront, make changes and put it back a week later?

Module 4: Analytics and Reports

Objectives

Upon completion of this module, you will be able to:

- Run predefined reports from Business Manager

Overview

Demandware Analytics and Reports are predefined reports that you can display for a given day, week, month, quarter or year. They update daily on the production instance only. They are based on session IDs and use web log data.

Analytics and Reports offer:

- Traffic data based on activity
- A way to understand trends over time
- Integrated A/B test reporting
- Pre-processed graphical trend analysis

Note: They do not contain data that is outside Business Manager, such as cancellations or returns. Usually an Order Management System is the system of record for that data. Many clients use third party analytics tools in conjunction with Demandware Analytics reports.

You cannot use Business Manager to configure Analytics and Reports.



Lesson 4.1: Viewing Analytics and Reports

1. Log in to Production. You need a password to access Production
2. Go to **Merchant Tools > Analytics**.
3. Select a report (such as Orders and Revenue report in the Purchase Reports category):

Report Category	Report Usage
Conversion Reports	How well are you converting site visitors?
Purchase Reports	How are your orders doing?
Catalog Reports	What are the top products ordered?
Search and Navigation Reports	How effective is your site search?
Customer Reports	Know the frequencies of purchasers (for registered customers)

Traffic Reports	Where is your traffic going to and coming from?
A/B Testing Reports	How are your tests performing?
Technical Reports	How is your site performing?

4. Click the calendar to select a date.
5. Select the duration by choosing a tab: Daily, Weekly, Monthly, Quarterly, or Yearly.

Daily Report | Weekly Report | **Monthly Report** | Quarterly Report | Yearly Report | Report

Reporting Date: 4/1/06 **Download Formats:** 

Reporting Period: 4/1/06 to 4/30/06

Report Generated: 2/2/06 5:31:24 am

Summary
This report provides an overview of the number of orders and the gross order revenue (in the store lead currency). From a business point of view, the orders and revenue overview will help you track your profitability.

Description	Value
Orders	2,338
Revenue	897,774.00 USD

Summary by Date
The summary by date provides a look at the total number of number of orders and revenue for specific dates. For example, you might notice that the total number of orders and revenue was greatest on the 16th.

Date	Legend
2006-04-01	Orders: 57, Revenue: 20,305.00 USD
2006-04-02	Orders: 40, Revenue: 18,824.00 USD
2006-04-03	Orders: 62, Revenue: 19,684.00 USD

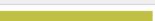
Note: You can output to an Excel spreadsheet by clicking on the Excel icon.

The following are examples of Order Conversion reports. These provide order conversion rates to determine areas for site improvements:

Order Funnel

The order funnel report represents the conversion of a visit into a cart, checkout start, or an order in a simple graphical form. The following options are available:

- **Visits:** The total number of visits excluding visits caused by robots or crawlers.
- **Cart Conversion:** The rate of visits with at least one cart to the total number of visits.
- **Checkout Conversion:** The number of visits with at least one checkout attempt in relation to the total number of visits.
- **Order Conversion:** The calculated conversion rate is based on the number of visits with at least one order and the total number visits as reported above.

Description	Count	%	
Visits	32,806	100.0%	
Cart Conversion	5,692	17.4%	
Checkout Conversion	3,097	9.4%	
Order Conversion	1,298	4.0%	

Checkout Funnel

This report shows how users go through the checkout process and where they might leave before the final order. The following information is important to understand this dataset.

- A normal checkout process lets the user browse back to a previous step or skip steps. Analytics has to take this into consideration to be able to present meaningful data: browsing back to a previous page will not be tracked; skipping a step will be leveled out by automatically increasing the counter for the skipped step.
- The names of the checkout steps are taken from the reported information and therefore are part of the implementation details.
- The implementation numbered the checkout steps in the right order of occurrence.

Description	%	
Checkout Step 1 - Shipping	100.0%	
Checkout Step 2 - Billing	85.5%	
Checkout Step 3 - Payment	70.9%	
Checkout Step 4 - OrderSummary	56.0%	
Order Confirmation Page	41.9%	

Summary

This report provides an analysis of the conversion of visits, shopping carts, and checkouts to orders. More specifically, the most important values are represented as the percent of visits that result in successful orders, the percent of shopping carts that result in successful orders, and the percent of checkout processes that have been started and result in successful orders for the selected time period. The base numbers from which the conversion rates are calculated are also provided in this report. From a business point of view, the visit to order conversion rate provides you with a good measure for the overall success of your store. A more detailed view helps you determine at which step in the order process you could improve the conversion rate. A visit can have multiple carts, checkouts, and orders.

- Order Conversion Rate: The percentage of visits that created at least one order.
- Checkout Conversion Rate: The percentage of visits with checkouts that created at least one order.
- Cart Conversion Rate: The percentage of visits with carts that created at least one order.
- Cart Checkout Rate: The percentage of carts that started at least one checkout.

Description	Value
Order Conversion Rate	4.0%
Checkout Conversion Rate	41.9%
Cart Conversion Rate	22.8%
Cart Checkout Rate	54.4%
Total Number of Visits	32,806
Total Number of Visits with Carts	5,692
Total Number of Visits with Checkouts	3,097
Total Number of Visits with Orders	1,298
Total Number of Carts	5,692
Total Number of Checkouts	3,097
Total Number of Orders	1,298

Summary by Date

The summary by date provides a look at the rates for specific dates. For example, you might notice that the conversion rate for your store was better starting on the 16th, after implementing a change in the checkout process.

Date	Conversion Rates	Visits
2009-08-31	4.2% 16.7%	50.0% 24
2009-09-01	4.0%	42.4% 1,820
2009-09-02	3.8% 24.9%	40.4% 1,551
2009-09-03	4.1% 21.3%	38.3% 1,388
2009-09-04	3.0% 16.8%	30.3% 1,101

The top search terms report helps tune keyword phrases, refine your pay-per-click strategy, and identify content enhancements.

Summary

This report provides an overview of the total searches, with and without results. In addition to these total numbers, the report provides a detailed view of the top search phrases, with and without results. From a business point of view, this report gives you an idea of what your customers are looking for in your storefront, and whether or not their searches are satisfactory.

- Searches with Results: Percentage of searches that returned one or more result(s).
- Unique Search Phrases with Results: Total number of unique search phrases within the total searches that returned one or more result(s).
- Searches without Results: Percentage of searches that returned no results.
- Unique Search Phrases without Results: Total number of unique search phrases within the total searches that returned no results.

Description	Value
Total Searches	190
Searches with Results	126 (66.32%)
Unique Search Phrases with Results	62
Searches without Results	64 (33.68%)
Unique Search Phrases without Results	48

Search Phrases with Results

The list of search phrases with results is a record of the top search phrases requested by customers and provides information on the number of times the search was launched, as well as the percentage of the total searches with results over the selected time period.

Search Phrase	Count
lather	6
harm	5
prism	4
isobars	4
dichotomy	4
elopement	4
mercifulness	4
pocket	3
expose	3
dial switch	3
petrology	3
rainwear	3

This is a promotion conversion report.

Promotion Conversion

This report details the usage of promotions with orders and carts within the specified time period. Visits are classified as follows:

- All Visits: Important business data from all visits with no filtering or sorting.
- With Any Promotions: All visits having used at least one promotion of any type.
- With Item Promotions: All visits having used at least one item level promotion.
- With Shipping Promotions: All visits having used at least one shipping level promotion.
- With Order Promotions: All visits having used at least one order level promotion.
- Without Promotions: All visits without any promotions applied to a cart or order.

Please note, that a visit with an item level promotion could have used an order level promotion as well. Therefore, you will find the values of these promotions and the visit in both columns. Additionally it is not required for a promotion to be applied to a final order to be shown in the table below. The usage of a promotion during the customer visit is sufficient to list this visit as a promotional visit.

Use this report to determine the most popular promotions by usage and conversion, tune your promotions, and identify outdated promotions.

Description	All Visits	With Any Promotion	With Item Promotions	With Shipping Promotions	With Order Promotions	Without Promotions
Visits	32,806 (100.0%)	1,650 (5.0%)	301 (0.9%)	643 (2.0%)	919 (2.8%)	31,156 (95.0%)
Order Conversion	4.0%	24.1%	25.9%	21.9%	24.9%	2.9%
Total Orders	1,298 (100.0%)	398 (30.7%)	78 (6.0%)	141 (10.9%)	229 (17.6%)	900 (69.3%)
Merchandise Total	268,491.85 USD	82,373.55 USD	18,375.85 USD	29,059.55 USD	46,728.60 USD	186,118.30 USD
Average Merchandise Total per Order	206.85 USD	206.97 USD	235.59 USD	206.10 USD	204.06 USD	206.80 USD
Average Merchandise Total per Visit	8.18 USD	49.92 USD	61.05 USD	45.19 USD	50.85 USD	5.97 USD
Average Items per Order	4.07	4.14	4.46	4.12	4.06	4.04
Average Visit Duration (h:m:s)	00:02:22	00:04:06	00:04:07	00:04:10	00:04:05	00:02:16

Conversion of Promotions

This table lists all campaigns and individual promotions and their respective order conversion. For each promotion, you can track how it drives order conversion and sales volume. Please note, that this table does not reflect whether or not a particular promotion was the driver or reason for the order. It also contains promotions which could have been applied or used during the visit but have not been applied to the final order. This reflects the fact, that promotions can be a reason for a site visit but at the end, they are not the key driver for an order.

Campaign ID	Promotion ID	Visits	Total Orders	Merchandise Total	Average Merchandise Total per Visit	Average Merchandise Total per Order	Items per Order	Order Conversion
Christmas	ItemPromo-ID-02	41	15	2,896.55 USD	70.65 USD	193.10 USD	4.00	36.6%
Christmas	ItemPromo-ID-05	31	5	1,008.90 USD	32.55 USD	201.78 USD	3.40	16.1%
Christmas	ItemPromo-ID-06	30	6	1,780.30 USD	59.34 USD	296.72 USD	4.83	20.0%
Christmas	ItemPromo-ID-07	33	12	2,584.95 USD	78.33 USD	215.41 USD	3.75	36.4%
Christmas	ItemPromo-ID-10	26	4	726.75 USD	27.95 USD	181.69 USD	3.50	15.4%
Christmas	OrderPromo-ID-02	127	31	6,319.40 USD	49.76 USD	203.85 USD	4.13	24.4%
Christmas	OrderPromo-ID-05	174	43	8,319.15 USD	47.81 USD	193.47 USD	3.95	24.7%
Christmas	OrderPromo-ID-06	167	41	8,437.90 USD	50.53 USD	205.80 USD	4.34	24.6%
Christmas	ShippingPromo-ID-02	218	57	12,706.25 USD	58.29 USD	222.92 USD	4.25	26.1%
EndOfMonthSale	ItemPromo-ID-01	27	8	1,709.05 USD	63.30 USD	213.63 USD	4.50	29.6%
EndOfMonthSale	ItemPromo-ID-04	18	5	1,841.10 USD	102.28 USD	368.22 USD	6.40	27.8%
EndOfMonthSale	ItemPromo-ID-09	28	6	1,442.10 USD	51.50 USD	240.35 USD	5.33	21.4%
EndOfMonthSale	OrderPromo-ID-01	141	35	8,131.05 USD	57.67 USD	232.32 USD	3.97	24.8%
EndOfMonthSale	ShippingPromo-ID-01	223	49	9,544.65 USD	42.80 USD	194.79 USD	4.16	22.0%



Lesson 4.2: Viewing Active Data

Active data is available on the production instance for products and customers.

1. Go to **Merchant Tools > Online Marketing > Active Data > Import & Export**.
2. Click **Export**.
3. Choose: **Customer Active Data or Product Active Data**. Click **Next >>**.
4. Enter the name of the Export File. Click **Export**.
5. In the **Process** column, select the file name to view the results in an Excel spreadsheet.

Example: Active data for a single product:

Active Data	
Traffic	
Impressions (1 Day):	123
Impressions (7 Days):	740
Impressions (30 Days):	4,031
Impressions (365 Days):	36,491
Views (1 Day):	28
Views (7 Days):	170
Views (30 Days):	814
Views (365 Days):	10,017
Conversion	
Conversion Rate (1 Day):	0.02%
Conversion Rate (7 Days):	0.02%
Conversion Rate (30 Days):	0.02%
Conversion Rate (365 Days):	0.03%
Orders (1 Day):	3
Orders (7 Days):	20
Orders (30 Days):	110
Orders (365 Days):	992
Units Ordered (1 Day):	3.00
Units Ordered (7 Days):	24.00
Units Ordered (30 Days):	133.00
Units Ordered (365 Days):	1,013.00
Revenue (1 Day):	255.00 USD
Revenue (7 Days):	1,560.60 USD
Revenue (30 Days):	9,703.10 USD
Revenue (365 Days):	67,694.08 USD
Look To Book Ratio (1 Day):	10.71%
Look To Book Ratio (7 Days):	11.76%
Look To Book Ratio (30 Days):	13.51%
Look To Book Ratio (365 Days):	9.90%
Sales Velocity (1 Day):	0.12 units/hour
Sales Velocity (7 Days):	0.33 units/hour
Sales Velocity (30 Days):	1.85 units/hour
Sales Velocity (365 Days):	14.07 units/hour
Prices & Rates	
Average Sales Price (1 Day):	85.00 USD
Average Sales Price (7 Days):	78.03 USD
Average Sales Price (30 Days):	88.21 USD
Average Sales Price (365 Days):	68.24 USD

Details about active data are in XChange: <https://xchange.demandware.com/message/29914>

Module 5: Pricing and Inventory

Objectives

Upon completion of this module, you will be able to:

- View and manage prices
- View and manage inventory

Note: You will probably import your price and inventory data. However, you may need to manage pricing and inventory settings in Demandware to perform hot fixes.



Lesson 5.1: Using Price Books to Manage Prices

A price book is a collection of prices for a group of products, not necessarily all products. You can have several price books active at the same time; for example one for list prices and one for sales prices. You can also have one with prices that are valid only for a certain customer group or you can have one which is scheduled to be active only for a specified date range.

A product can be in multiple price books with different prices.

Example: a product can appear in both the *list* price book and the *sale* price book.

You can create additional price books to support other currencies.

Example: usd_list, usd_sale, euro_list, euro_sale

There are two ways to view pricing:

- The **Pricing** tab of an *individual product* displays the prices in all the price books for this product.
- The price book displays prices for all the products in this specific book.

If the system does not find an applicable price book for a variation product, it uses the price for the master product.

Price books support *tiered* pricing. For example, the customer could buy one product for \$200, but 10 or more products for \$180 each.

Adding and Editing Price Books

1. Go to **Merchant Tools > Products & Catalogs > Price Books**.
2. Click **New**.
3. Use the tabs to set up the price book as appropriate.

- a. Use the **General** tab to specify the ID, name, currency (it can only have one), schedule (optional), and whether the price book is active. You can specify an existing price book as the basis for the new price book, reducing the need to copy prices because the new price book inherits the prices of the parent. You can override the inherited prices.
- b. Use the **Attributes** tab to specify attribute groups for your price book
- c. Use the **Site Assignments** tab to assign the price book to one or more storefront sites.
- d. The **Price Definitions** tab contains the single records of the price book. Choose **In Price Book** and click **Find** to see all the products with their prices that are contained in this price book.

[Price Books](#) > usd-list-prices - Price Definitions

General Attributes Site Assignments **Price Definitions** 

usd-list-prices

Search for products and define price tables for those products.

After you find a product, you can define price tables for the product. Each entry in a price table specifies a quantity and either a price (for example, 12.99) or a percentage discount off the product's list price (for example, 10%). You can have multiple entries in a table, allowing you to specify lower prices for larger quantities. Use the Price Info field to attach additional details to a price table.

If you define multiple price tables for a product, each price table must have a different valid period. Click the time period to edit the dates for an existing price table.

To confirm entered product prices, click **Apply**. To remove an individual price book price, remove the price or percentage amount from the price field. To remove an entire price table, select the checkbox next to the table and click **Delete**.

Search Products											
ID or Name:	<input type="text"/>	Find	(Enter full product ID, name or use the '*' anywhere in your search term.)								
<input type="radio"/> All <input checked="" type="radio"/> In Price Book <input type="radio"/> Not In Price Book											
<input type="checkbox"/>	Product ID	Name	Valid Period	Price Table (USD)							
<input type="checkbox"/>	008884303989	Platinum Blue Stripes Easy Care Fitted Shirt [Color: White / Size: 10]	Add Price Table	\$75.00							
<input type="checkbox"/>	Price Info:		Continuous	<table border="1"> <tr> <td>1.00</td> <td>=</td> <td>75.00</td> </tr> <tr> <td></td> <td>=</td> <td></td> </tr> </table>	1.00	=	75.00		=		
1.00	=	75.00									
	=										
<input type="checkbox"/>	008884303996	Platinum Blue Stripes Easy Care Fitted Shirt [Color: White / Size: 12]	Add Price Table	\$75.00							

To change a price or add a tiered price:

1. On the **Price Definitions** tab, enter the unit price, the price for an individual product, not the combination. Note: Press Enter in the price field to add another row for tiered pricing.
2. Click **Apply**.

Note: You can override the price book's defined schedule for an individual product. In the **Valid Period** column, click the **Continuous** link. Then specify the information as appropriate.



Practice: Change the Price of a Product

1. Take one of the products in your category, and change its price. You can do this either in the **Pricing** tab of the product, or in the price book.
2. Optional: Schedule a new price for a future date.
3. Preview it with the storefront toolkit.

Which Price Displays on the Storefront?

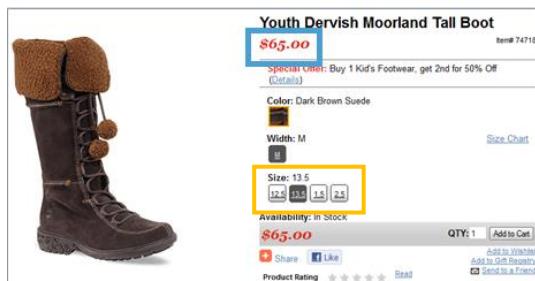
While a product can be in different price books, Demandware always displays the lowest price available to each visitor using the following criteria:

- Price books assigned to the site
- Price books marked active
- Price books that are valid for current date and time
- Price books for the current currency
- Quantity of products in the cart
- Valid promotions

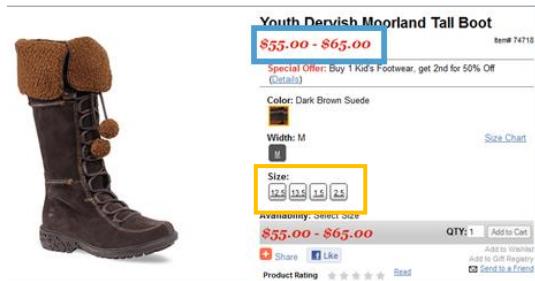
Prices for Variation Products and Variation Masters

Each product variation has its own price. The master does not have a price; it shows the range of the prices for the variation products.

This example shows a variation product on top and the variation master below it. The top has size 13.5 selected. In the bottom screen, since the size has *not* been selected a price range is displayed:



Youth Dervish Moorland Tall Boot
\$65.00 Item# 74718
Special Offer: Buy 1 Kid's Footwear, get 2nd for 50% Off (Details)
Color: Dark Brown Suede
Width: M
Size: 13.5
12.5 13.5 15 24
Availability: In Stock
\$65.00 QTY: 1 Add to Cart
Share Like Add to Wishlist Add to Gift Registry Send to a Friend
Product Rating ★ ★ ★ ★ ★ Read



Youth Dervish Moorland Tall Boot
\$55.00 - \$65.00 Item# 74718
Special Offer: Buy 1 Kid's Footwear, get 2nd for 50% Off (Details)
Color: Dark Brown Suede
Width: M
Size:
12.5 13.5 15 24
Availability: Select Size
\$55.00 - \$65.00 QTY: 1 Add to Cart
Share Like Add to Wishlist Add to Gift Registry Send to a Friend
Product Rating ★ ★ ★ ★ ★ Read

Product Status

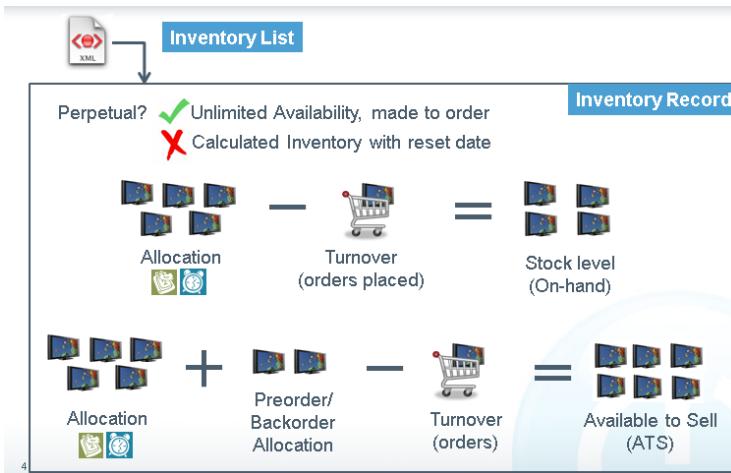
Products can have the following status:

- In-Stock (available)
- Unavailable
- Preorder
- Backorder

Demandware takes into account the turnover of a product and automatically calculates the status and allocation of each product.

Preorder and Backorder

The inventory list is updated with turnover and preorder or backorder allocation to display the actual stock level or Availability to Sell (ATS).



Preorder and backorder work in the same way: you can sell products that are not in stock, but you already know that you will have them available in the future. The difference is that backorder applies to products that you already had in stock before, whereas pre-order applies to new products which are not available yet.

Without preorder or backorder, the stock level will be the same as the ATS.

Inventory for different product types

Generally, everything that has a SKU has inventory data as well.



Type	Description
Variation Products	<p>The variation master does not have inventory data, since a customer cannot purchase it. Each variation product has its own inventory data.</p> <p>Example: A coat can have three variation products in size small, and ten variation products in size medium.</p>
Product Sets	Each product in a set has its own inventory data. The product set as a whole does not have inventory data, because the set itself cannot be purchased.
Product Bundles	<p>The bundle itself and the single products have their own inventory data.</p> <p>If a product bundle has an inventory record, Demandware uses it in the calculation of the availability of the product bundle. Otherwise, Demandware calculates the availability of the product bundle from the availability of the bundled products.</p>



Lesson 5.2 Inventory Settings & Management

All settings for inventory are available in **Merchant Tools > Products & Catalogs > Inventory**.

To Show Orderable Products Only in Search Results

Go to **Merchant Tools > Search > Search Preferences** and enable **Show Orderable Products Only**. This excludes all products with ATS 0 from the search results. Only the available variations of a product master will display—those that are out of stock will not.

Note: This setting applies across the entire storefront site, however, your developer may override this setting using the API.

Create an Inventory List

Usually one inventory list is enough to manage your inventory. However, you can create another inventory list (for example, for a loyalty program or employee discounts).

1. Go to **Merchant Tools > Products & Catalogs > Inventory**.
2. Click **New**.
3. Enter an ID and a Description.
4. Click **Apply**.

Add and Edit Product Inventory Data

You can import inventory data for products via a feed into Demandware or create it manually. If inventory changes are necessary they are frequently done at the feed's source. For manual updates, inventory updates are not included in replications, you must do a hot-fix in production.

To import data:

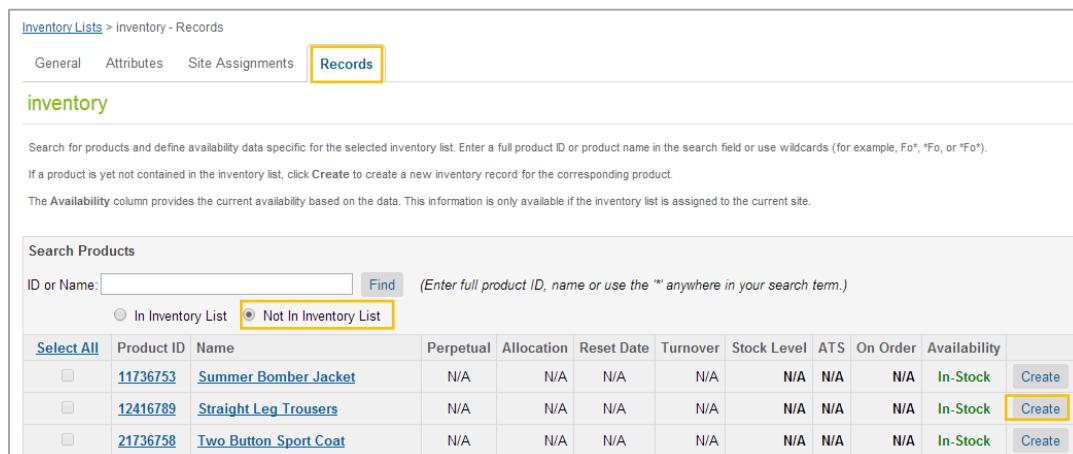
1. Go to **Merchant Tools > Products & Catalogs > Import & Export**.
2. In the **Inventory Lists** section, click **Import**.

The following import options are available:

- **Merge** - Updates existing database objects and creates new objects based on the XML file.
- **Update** - Updates existing database objects only (it does not create new objects based on the XML file).
- **Replace** - Deletes and recreates existing database objects and creates new objects based on the XML file.
- **Delete** - Deletes all database objects contained in the XML file.

To add single products to an inventory list:

1. Go to **Merchant Tools > Products & Catalogs > Inventory > Inventory List**.
2. Select an inventory list and select the **Records** tab.
3. Click **Not In Inventory List**.
4. Find the product to add.



Select All	Product ID	Name	Perpetual	Allocation	Reset Date	Turnover	Stock Level	ATS	On Order	Availability	
<input type="checkbox"/>	11736753	Summer Bomber Jacket	N/A	N/A	N/A	N/A	N/A	N/A	N/A	In-Stock	Create
<input type="checkbox"/>	12416789	Straight Leg Trousers	N/A	N/A	N/A	N/A	N/A	N/A	N/A	In-Stock	Create
<input type="checkbox"/>	21736758	Two Button Sport Coat	N/A	N/A	N/A	N/A	N/A	N/A	N/A	In-Stock	Create

5. Click **Create**.

To edit the inventory data of a single product:

1. Go to **Merchant Tools > Products & Catalogs > Inventory**.

2. Click the inventory list in which you want to make the change.
3. In the **Records** tab, search for the product that you modify.

[Inventory Lists](#) > inventory - Records

General Attributes Site Assignments **Records**

inventory

Search for products and define availability data specific for the selected inventory list. Enter a full product ID or product name in the search field or use wildcards (for example, Fo*, *Fo, or *Fo*). If a product is yet not contained in the inventory list, click **Create** to create a new inventory record for the corresponding product. The Availability column provides the current availability based on the data. This information is only available if the inventory list is assigned to the current site.

Search Products	
ID or Name:	<input type="text"/> Find <small>(Enter full product ID, name or use the '*' anywhere in your search term.)</small>
<input checked="" type="radio"/> In Inventory List <input type="radio"/> Not In Inventory List	
You did not search for products yet.	

4. Find a product. Click **Edit**.

[Inventory Lists](#) > inventory - Records

General Attributes Site Assignments **Records**

inventory

Search for products and define availability data specific for the selected inventory list. Enter a full product ID or product name in the search field or use wildcards (for example, Fo*, *Fo, or *Fo*). If a product is yet not contained in the inventory list, click **Create** to create a new inventory record for the corresponding product. The Availability column provides the current availability based on the data. This information is only available if the inventory list is assigned to the current site.

Search Products											
ID or Name:	<input type="text"/> Find <small>(Enter full product ID, name or use the '*' anywhere in your search term.)</small>										
<input checked="" type="radio"/> In Inventory List <input type="radio"/> Not In Inventory List											
Select All	Product ID	Name	Perpetual	Allocation	Reset Date	Turnover	Stock Level	ATS	On Order	Availability	
<input type="checkbox"/>	008884303989	Platinum Blue Stripes Easy Care Fitted Shirt [Color: White / Size: 10]	No	100.00	2/14/14 8:52:14 pm	0.00	100.00	100.00	0.00	In Stock	Edit
<input type="checkbox"/>	008884303996	Platinum Blue Stripes Easy Care Fitted Shirt [Color: White / Size: 12]	No	100.00	2/14/14 8:52:14 pm	0.00	100.00	100.00	0.00	In Stock	Edit

On this screen, it is possible to:

- Make the product perpetual (the product is always in stock – e.g. for gift cards)
- Change the allocation of the product
- Assign preorder or backorder handling and allocation
- Assign an In Stock Date when the product will be available again

Business Manager does not currently support editing inventory in bulk.



Practice: Change Inventory Allocation

1. Change the allocation and pre-order or back-order handling for one of the products in your category.
2. Preview it on the storefront.

Delete Products from an Inventory List

To remove one product from an inventory list:

1. Go to **Merchant Tools > Products & Catalogs > Inventory**.
2. Select the inventory list.
3. Click the **Records** tab.
4. Select the product to delete.

Select All	Product ID	Name	Perpetual	Allocation	Reset Date	Turnover	Stock Level	ATS	On Order	Availability	
<input checked="" type="checkbox"/>	008884303989	Platinum Blue Stripes Easy Care Fitted Shirt	No	100.00	2/14/14 8:52:14 pm	0.00	100.00	100.00	0.00	In-Stock	<button>Edit</button>
[Color: White / Size: 10]											

5. Click **Delete**.

The product itself will not be deleted; it will be removed from this inventory list and depending on the settings for your implementation the product will no longer be available to sell.

Multiple Inventory Lists

You can associate specific stores with corresponding inventory lists. You can expose available products for sale at a store location, supporting the ability to buy online, pickup in store, in store fulfillment or driving shoppers to retail stores for products that are not available online.

You can create up to 3,000 inventory lists in an instance. Inventory lists can be imported and associated with a store.

- The total number of allowed inventory records across all inventory lists in an instance is 30,000,000. A quota has been introduced to enforce this limit.
- Business Manager's Inventory List page supports search and paging.
- Business Manager Product > Inventory page supports search by inventory list ID

These features can enhance the customer shopping experience by:

- Enabling them to search for items that are in stock in physical stores nearby to.
- Provide an alternative if an item is not available from the eCommerce warehouse
- Enable the customer to pick up the product immediately
- Save the customer on shipping fees (because the store is close by)
- Help in-store shoppers (via a kiosk or tablet) to locate an available unit within their immediate vicinity.
- Provide ship-from-store checkouts or manage shipment from regional warehouse facilities (each ship-from location has an inventory list which is appropriately decremented based on the ship-to address of the order.)

For details, see your documentation, *Managing Inventory Lists*. You'll need a developer to set up this feature as described in the document, *Leveraging Multiple Inventory Lists*, available on XChange:

<https://xchange.demandware.com/docs/DOC-12074>



Best Practices

- Communicate clearly with your development team about the data mapping for the pricing and inventory. You have to know how the data is getting into Demandware, the schedule and those who are responsible.
- Test inventory record updates in Development or Staging before going into production. Inventory data is not replicated to Production it is sent directly to Production.



Knowledge Check

1. You realize that a price for a product is showing up on the web site as \$0.13 instead of \$13.00. How do you correct the product price immediately?
2. How do you troubleshoot when the storefront price of a product is lower than expected?
3. How do you provide a lower price per unit for a given product provided the customer purchases 3 or more units? Where is that done in Business Manager?
4. What does ATS mean?
5. How do you set the inventory for a product to always be in stock?
6. You have a product available for preorder. How do you validate that it displays on the storefront and that the storefront only allows orders for the specified preorder allocation?

Module 6: Recommendations

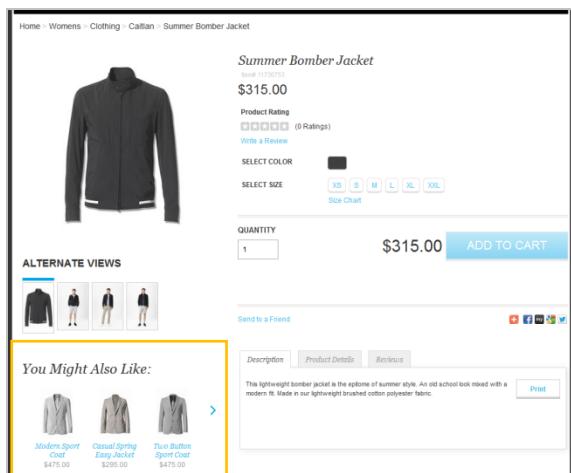
Objectives

Upon completion of this module, you will be able to:

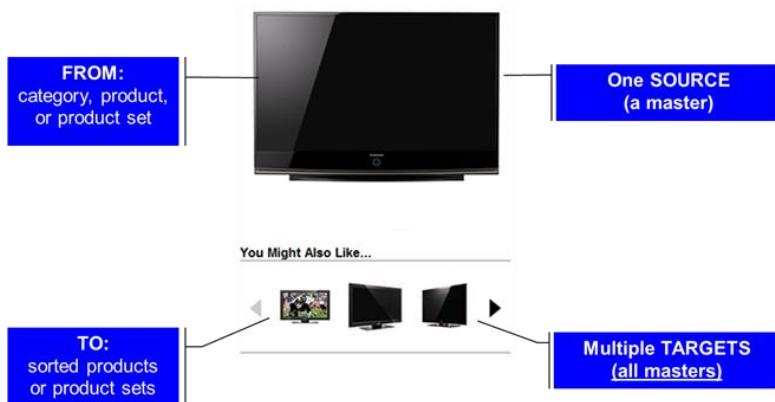
- Create explicit product recommendations
- Modify the sort order of the recommendations
- Specify display attributes for recommendations (if applicable)

Overview

This is an example of a recommendation in SiteGenesis.



This is an **explicit** recommendation, where you must specify the source and the targets of each recommendation.



The recommendation *type* is a number that indicates:

Location:

- 1 (Product Detail Page – Cross Sell)
- 2 (Category Landing Page – Featured Items)
- 3 (Other)

Note: Recommendations can also be placed on the No-Results Search Page

The phrase is tied to the location such as:

- “You Might Also Like...”
- “She’s Also Wearing...”
- “We Recommend...”
- “Our Experts Recommend...”
- “Additional Related Products”

To create a recommendation:

1. Go to **Merchant Tools > Products and Catalogs > Recommendations** (or go to a product and select the **Recommendations** tab).
2. Click **New**.

To modify the sort order of the recommendations:

1. Go to Merchant **Tools > Products and Catalogs > Recommendations** (or go to a product and select the **Recommendations** tab).
2. Click **Sort**.
3. Use the sorting arrows to modify the order of the products in the recommendation.



Practice: Create a Recommendation

1. Choose any product.
2. Think about what to recommend for that product.
3. Add 1-3 recommendations (masters or standard products).
4. View the result in the storefront.

Module 7: Improving Search Results

Objectives

Upon completion of this module, you will be able to:

- Describe strategies to improve the results of on-site search in Demandware.
- Guide consumers to specific products, categories or pages by configuring search redirects
- Reduce unwanted results in the result set

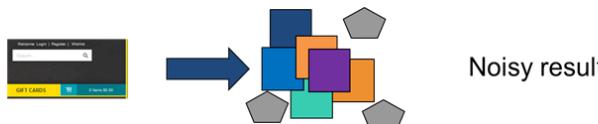
Overview

Surgical shoppers are those who use the onsite search to find products. These searchers:

- Convert at a 250-300% higher rate than shoppers that navigate
- Buy 11% more items per order than shoppers who navigate
- Spend 15% more per order than shoppers that navigate

Therefore, it is important to support effective search.

A search can yield a noisy result, where the result set contains different items than the ones requested. Using Business Manager, you can refine results to improve accuracy. You can also add related products to the results to yield more of the desired products on the product listing page.



- We can **remove noise** from the results



- We can **add related products** to the results



Use the following Business Manager tools to make these improvements:

- Search Indexes
- Synonym Groups
- Redirect Groups
- Hypernyms
- Search Suggestions

- Common Phrases
- Stopwords
- Searchable Attributes
- Exclusions
- Spell Checking



Lesson 7.1: Manage Search Indexes

A search index provides a quick way for the system to sort items. Demandware maintains many indexes; it updates certain indexes whenever you click **Apply** in Business Manager.

When you make changes to data, the system triggers an update to the relevant index (such as the product index). The Incremental Index Update makes these changes in near real-time; the Demandware platform detects changes every 30 seconds and updates indexes. You can enable/disable incremental indexing for each index type on each instance, but it applies to all locales on the instance. Incremental Index Updates are recommended in the Development and Staging environments. You can schedule updates for a future date and time.

Administrators can re-index to capture any changes made to products or content information.

Re-indexing is required in a Sandbox while incremental indexing handles the task automatically in Staging.

To re-index:

1. Go to **Merchant Tools > Search > Search Indexes**.
2. Select one, many, or all of the indexes.

Search Indexes

Search Indexes

This page provides access to and management capabilities for fulltext search indexes. The indexes listed here are used in your site to fulfill search requests. If no fulltext index has been built yet or you want to update an index, select the index using the checkboxes and click Reindex. All index updates are performed asynchronously in the background. The old index remains operational until a new index is ready.

This page also provides access to the settings for scheduled and incremental index building. The checkboxes can be used to enable or disable scheduled and incremental index rebuilding. Use the [Analyze Index Settings](#) button to manage scheduled rebuilds.

* Instances of the type Sandbox/Clear manually, the Search Index Update Job can only be triggered manually. If ran rebuild indexes, enabled for scheduled reindexing.

The index rebuild schedule settings

Selects all indexes

<input checked="" type="checkbox"/>	Index Type / Locale	Status	Documents	Index Size	Last Update
<input checked="" type="checkbox"/>	Product / Spelling Indexes	<input checked="" type="checkbox"/> Scheduled Index Rebuild *	<input checked="" type="checkbox"/> Incremental Index Updates		
Product Index					
<input checked="" type="checkbox"/>	Default	Online	4,167	1.13 MB	3/12/14 5:55:14 pm
Spelling Index					
<input checked="" type="checkbox"/>	Default	Online	390	51.14 KB	2/20/14 2:32:34 pm
<input checked="" type="checkbox"/>	Content Index	<input checked="" type="checkbox"/> Scheduled Index Rebuild *	<input checked="" type="checkbox"/> Incremental Index Updates		
<input checked="" type="checkbox"/>	Default	Online	26	73.58 KB	2/20/14 2:32:09 pm
<input checked="" type="checkbox"/>	Synonym Index	<input checked="" type="checkbox"/> Scheduled Index Rebuild *	<input checked="" type="checkbox"/> Incremental Index Updates		
<input checked="" type="checkbox"/>	Default	Online	25	2.97 KB	2/20/14 2:32:09 pm

3. Click **Reindex**.

4. Click **Refresh** to see the status of each index change to Online.



Lesson 7.2: Managing Synonym Groups

Synonyms provide alternate words for a search word. This is a list of multiple “or” words separated by commas. When one of the words is found, the results for all of the words are returned.

Examples:

- glove, gloves, mitten, mittens
- jeans, dungarees, blue jeans, levis, denims
- Negative synonyms should be included. These allow terms that do not match to be removed.

Example: “jeans –skirts” would result in a search for “jeans” removing any “jeans skirts” from the list of results.

Synonyms have a locale. In Canada, you might want to create “blouse” as a synonym for “shirt.” In that case, searching for either word would display the same list of shirts.

Synonyms can include frequent misspellings by customers. For example, include both “scarves” and “scarfs”

To create a synonym:

1. Go to **Merchant Tools > Search > Synonym Dictionary**.
2. Set the Locale (Frequently this is Default).
3. In **New Group**, enter the synonyms separated by commas.
4. Click **Apply**.

Note: You do *not* need to re-index unless you are using a sandbox.

Example: If a search for “pants” gave 3 results then a synonym group: pants, trousers, slacks might give 14 results.



Practice: Change a Search Synonym

1. Create a synonym group that includes a misspelling for your favorite product.
2. Check it on the storefront

Note: When incremental indexing is “on,” it is not necessary to re-index after a synonym has been added unless you are using a sandbox.



Lesson 7.3: Managing Search Redirects

When a visitor searches for a term or phrase they would usually see a list of products as the result. Instead, merchants can define a *redirect* in advance that will avoid the product search. Based on the phrase entered by the visitor, you can redirect them to a product, category, content asset, pipeline, or a URL. There can be up to 1000 redirects per storefront site.

Examples:

- Searching for “cell phone” can redirect them to the mobile-phone category.
- Searching for “job,” “career” or “employment” can redirect them to the careers-page.
- Searching for “service,” “support,” or “help” can redirect them to the customer service URL.

The redirect syntax types include:

Exact	[search term]	In that order with no other words in the search term
Phrase	“search term”	In that order with other terms included
Broad	search term	In any order with singular/plural forms
Negative	-negative	Requires a search term but removes the negative term

To enable the extended redirect syntax:

1. Select **Merchant Tools > Site Preferences > Guided Search**.
2. In the Search Redirect Settings section, enable Search Redirect Keyword rules.

To create a redirect:

1. Go to **Search > Search Driven Redirects**.

2. Click **New**.

3. In the New Search Direct Screen:

- a. Enter the keywords

- b. Check online

- c. Select an Action:

- Show a Product

- Show a Category

- Show a Content Asset

- Redirect to URL (that starts with http://)

- Redirect to a pipeline (to execute a program created by a Developer)

- d. The **Content ID** depends on the action selected (such as a Product ID, Category ID, Content Asset ID).

Note: You do *not* need to re-index.



Practice: Create a Search Redirect

1. Create a redirect for the word, “facebook,” “work,” “support,” “sizing” or “blog.” If those are taken use your last name.
2. Redirect to a URL of your choice such as Google or Facebook.
3. Don’t forget to put it online.
4. Test the redirect on the storefront.

Note: You do *not* need to re-index.



Lesson 7.4: Managing Hypernyms

Hypernyms define a broad term based on existing terms.

Examples:

- The terms “stripe,” “check,” “floral” and “print” build a term: “**pattern**”
- The terms “desktop,” “laptop,” “notebook,” “tablet” build a term: “**computer**”

To create a hypernym:

1. Go to Merchant **Tools > Search > Hypernym Dictionary**.
2. In the **New Mapping** field, enter the hypernym with the broad term on the right.

New Mapping:	<input type="text"/>	is a kind of	<input type="text"/>
--------------	----------------------	--------------	----------------------

3. Click **Apply**.



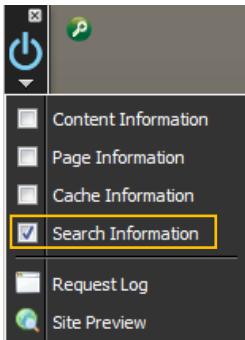
Lesson 7.5: Using the Storefront Toolkit

The Storefront Toolkit enables you to gather search information from the storefront in Staging or Development or Sandboxes. Production does not provide access to the toolkit.

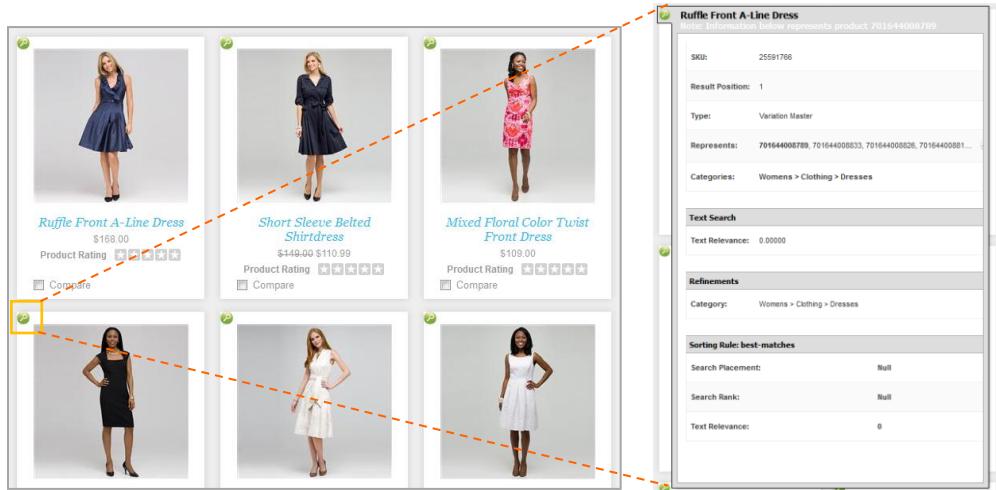
The search information provided includes the SKU, type, result position, categories of the selected product.

To display the Search Information:

1. From Storefront Toolkit, check Search Information.



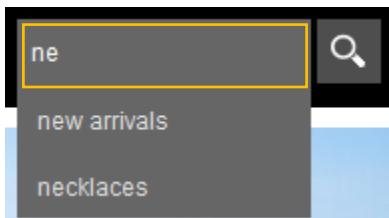
- Move your mouse pointer over one of the green magnifying glasses, to view information about a single product.



Lesson 7.6: Managing Search Suggestions

A search suggestion auto-completes a phrase as the customer types based on the terms entered in Business Manager.

Example: When a visitor begins typing “ne” in a search phrase two choices display:



Disabling the search suggestion feature prevents the display of suggestions. The Administrator can enable/disable search suggestions:

- Go to **Merchant Tools > Search > Search Preferences**.
- In the **Search Suggestion Settings section**, enable or disable search suggestions (As appropriate).
- Click **Apply**.

When the customer enters the first few characters in the search box on the storefront, a pop-up helps them find products.

Example: As soon as a male customer types “je,” the following possible terms automatically display.

je	GO
jeans	330 results
jewelry	285 results
jeans world	101 results
jeans world womens	62 results
jeans world mens	49 results

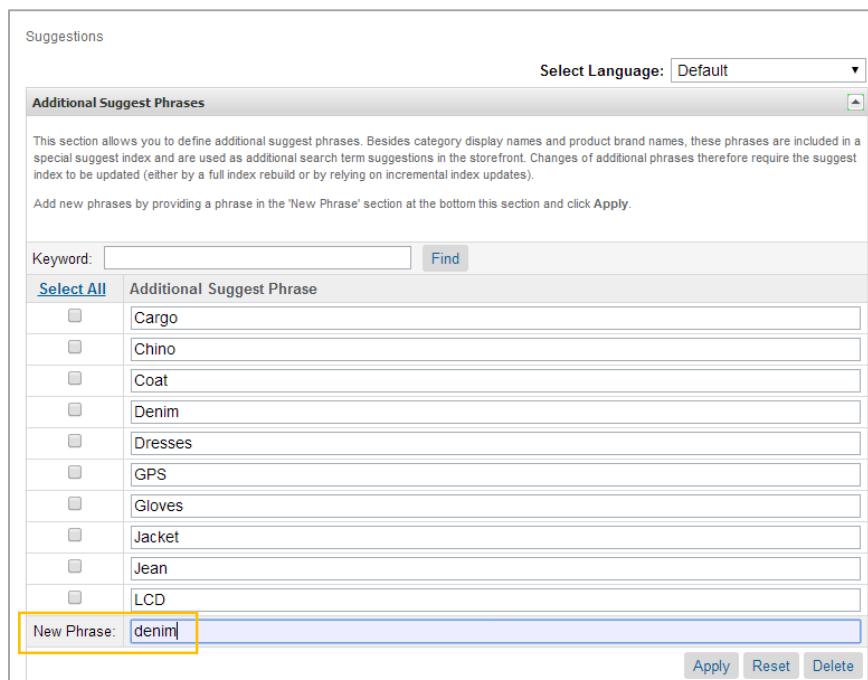
In this example, a search for “jeans” returns 330 results. Selecting “jeans world mens” returns 49 results. That is fewer in number and a big improvement in relevancy.

Additional details about search suggestions:

- You can include/exclude terms from the list of suggestions
- Category names are automatically included in the list of search suggestions
- Other search techniques will be applied after the term is selected by the visitor
- The results on the storefront show the top 10 suggestions listed from high to low
- If a search term yields zero results, the term will not display in the list of suggestions.

To create a search suggestion:

1. Go to Merchant Tools > Search > Search Suggestions.
2. Select the language, add suggestion phrases in the **New Phrase** field, and click Apply.



Suggestions

Select Language: Default

Additional Suggest Phrases

This section allows you to define additional suggest phrases. Besides category display names and product brand names, these phrases are included in a special suggest index and are used as additional search term suggestions in the storefront. Changes of additional phrases therefore require the suggest index to be updated (either by a full index rebuild or by relying on incremental index updates).

Add new phrases by providing a phrase in the 'New Phrase' section at the bottom this section and click Apply.

Keyword:	Find
<input type="checkbox"/> Select All	Additional Suggest Phrase
<input type="checkbox"/>	Cargo
<input type="checkbox"/>	Chino
<input type="checkbox"/>	Coat
<input type="checkbox"/>	Denim
<input type="checkbox"/>	Dresses
<input type="checkbox"/>	GPS
<input type="checkbox"/>	Gloves
<input type="checkbox"/>	Jacket
<input type="checkbox"/>	Jean
<input type="checkbox"/>	LCD
New Phrase:	denim

Apply Reset Delete

3. Optionally, add phrases to the black list.

Suggestion Black List

This section allows you to manage a list of excluded terms (black list). All potential search suggestions (category display names, product brand names and additional phrases) containing one of these terms will be ignored in the suggest index.

To Add an entry to the black list simple type it into the input box below and click **Apply** to save your changes. Make sure to separate each distinct entry with a comma (,).

Apply

4. Click **Apply**.



Practice: Create a Search Suggestion

1. Find a term that has products.
2. Create a search suggestion.
3. Test it on the storefront by typing the first three letters of the suggestion.

Note: It is not necessary to re-index when creating search suggestions unless you are using a sandbox. Re-indexing will be explained later.

Note: Search suggestions can be language-specific; each locale can have search suggestions that are specific to that locale.



Lesson 7.7: Managing Common Phrases

When a common phrase is created, it results in the entire search string being found by the storefront search rather than finding individual words. This is useful for phrases that have special meaning or where the meaning differs from search for individual words.

Common phrases provide consumers with more meaningful search results:

- “hand bag” never returns bags
- “swim suit” never returns suits
- “Bed in a bag” should not return bags or beds

Examples: “shoe cleaner,” “watering can,” “global positioning system,” “engagement ring”

To create a common phrase:

1. Go to **Merchant Tools > Search > Common Phrase Dictionary**.
2. Enter the phrase.
3. Click **Apply**.



Lesson 7.8: Managing Stopwords

Stopwords are common words included in the search term that are irrelevant and do not refer to products. Therefore you want the search engine to ignore these words when customers enter them.

Examples: a, an, and, are, as, at, be, but, by, for, if, in, into, is, it, no, not, of, on, or, such, that, the, their, then, there, these, they, this, to, was, will, with, x

To identify stopwords:

1. Once your site is live.
2. Go to **Merchant Tools > Analytics > Search and Navigation Reports > Top Search Terms**.
3. Scroll down to view the search terms.
4. Identify possible stopwords in the search terms then modify the list of stopwords.

To modify the list of stopwords:

1. Go to **Merchant Tools > Search > Stopword Dictionary**.
2. Modify the stopwords.
3. Click **Apply**.

Consider using a Google search to identify stopwords in many other spoken languages.



Lesson 7.9: Configuring Searchable Attributes

You can select attributes to consider when sorting by text relevancy. Text relevancy is a number that indicates how close the search phrase matches the searchable attributes. You can modify this number to influence the positioning of single products in the search results.

Attributes can be included or excluded in the on-site search.

Example: The ID and Brand attributes can be searchable. Some clients wish to allow their customers to search for products that contain these attributes while others require those attributes to be ignored.

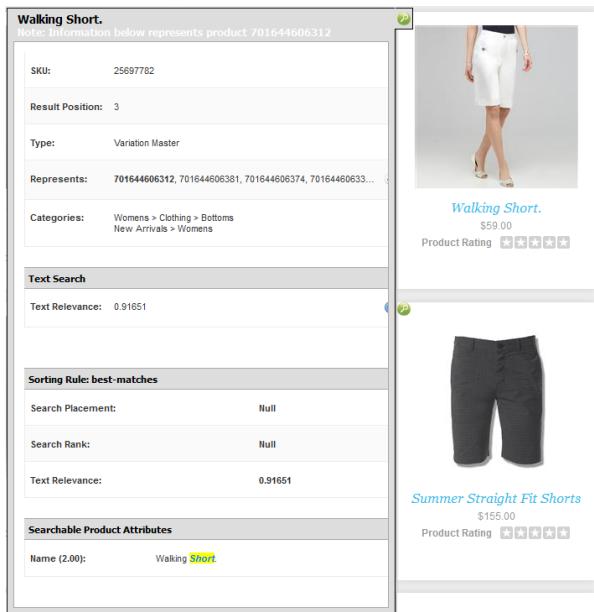
A search term found in the “name” attribute is more likely to be a strong match than the same term found in the “long description” attribute.

Example: After searching on the storefront for “short” the result is based on the attributes that contain the string “short.”

To view search information on the storefront:

1. In Business Manager, select **Storefront**.

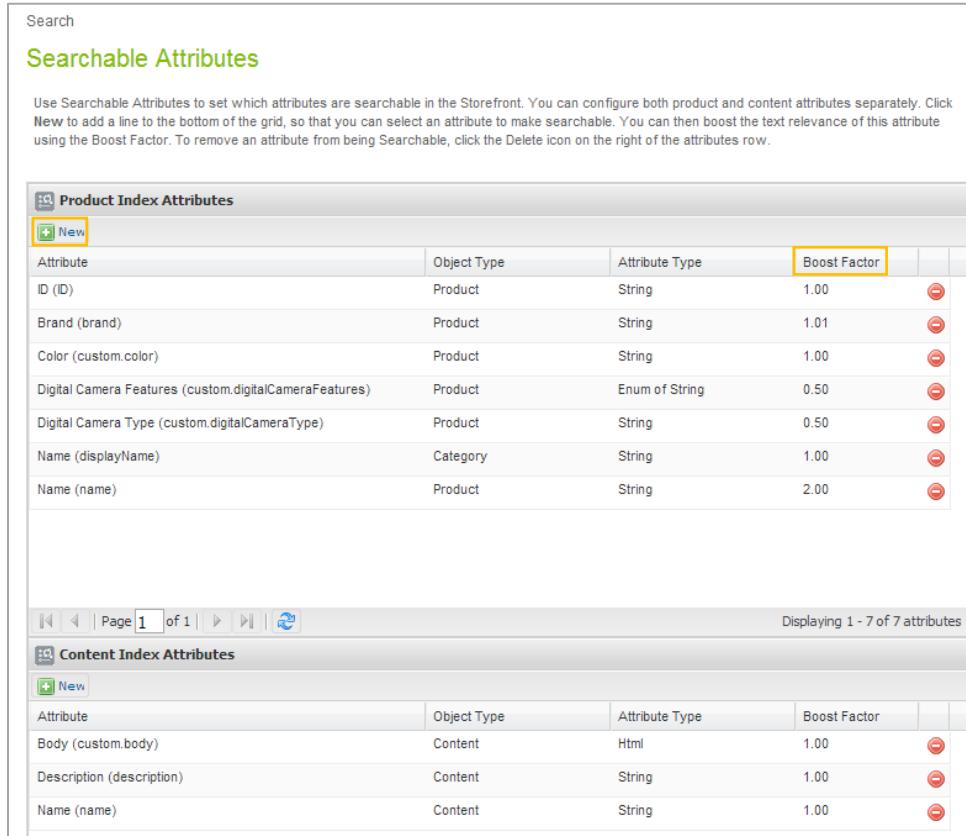
2. Open the Storefront Toolkit in the top left-hand corner of the storefront.
3. Select **Search Information**. Hover the mouse pointer over a product's green magnifying glass icon.



It lists the attributes and their Boost Factor. A higher number is more important than a lower number; the default is 1.00. The boost factors are relative to 1.00 so a boost factor of 2.00 means it is twice as important.

To modify the attribute list:

1. Go to **Merchant Tools > Search > Searchable Attributes**.
2. Product attributes display in the top section, while content attributes display in the bottom section.



Product Index Attributes					
New	Attribute	Object Type	Attribute Type	Boost Factor	
ID (ID)	Product	String	1.00		
Brand (brand)	Product	String	1.01		
Color (custom.color)	Product	String	1.00		
Digital Camera Features (custom.digitalCameraFeatures)	Product	Enum of String	0.50		
Digital Camera Type (custom.digitalCameraType)	Product	String	0.50		
Name (displayName)	Category	String	1.00		
Name (name)	Product	String	2.00		

Content Index Attributes					
New	Attribute	Object Type	Attribute Type	Boost Factor	
Body (custom.body)	Content	Html	1.00		
Description (description)	Content	String	1.00		
Name (name)	Content	String	1.00		

3. To add a searchable attribute, click **New**.
4. Enter a **Boost Factor**.

To remove an attribute from the search, click .



Lesson 7.10: Managing the Exclusion of Category Names

Combination categories can include terms that are not closely related so a search for one of the names could yield undesirable search results.

Example: The Jewelry & Watches category is a combined category so a consumer who searches for watches will also get jewelry results.

You can remove this combination to prevent confusion over the results. To do so, enter the exact category name string for each locale. These are case insensitive.

Go to: Merchant Tools > Search > Category Name Exclusions:

Category Name Exclusions

Category Name Exclusions

Category names that are excluded are not indexed as keywords for the product and are not included in search phrase suggestions. This is generally useful for combination categories that have subcategories with very distinct products. For example, if your storefront has a 'Boys & Girls' category and the customer searches for 'boy', you do not want girl items to be included in the search result because of the 'Boy & Girl' category name that would be inherited by all products in that catalog tree.

Exclusions are managed in groups. The list of category names in a group must be delimited by comma. If a category name contains a comma, it must be escaped with '\', for example example 'Consoles, Games and more'.

Create a new exclusion by providing your word list in the 'New Group' section below. Click **Apply** to update the exclusions.

Search Category Exclusions

Keyword: Locale: Find

Select All Category Name Exclusions

<input type="checkbox"/>	belts & scarves
<input type="checkbox"/>	boy & girl
<input type="checkbox"/>	hats & gloves

New Group:

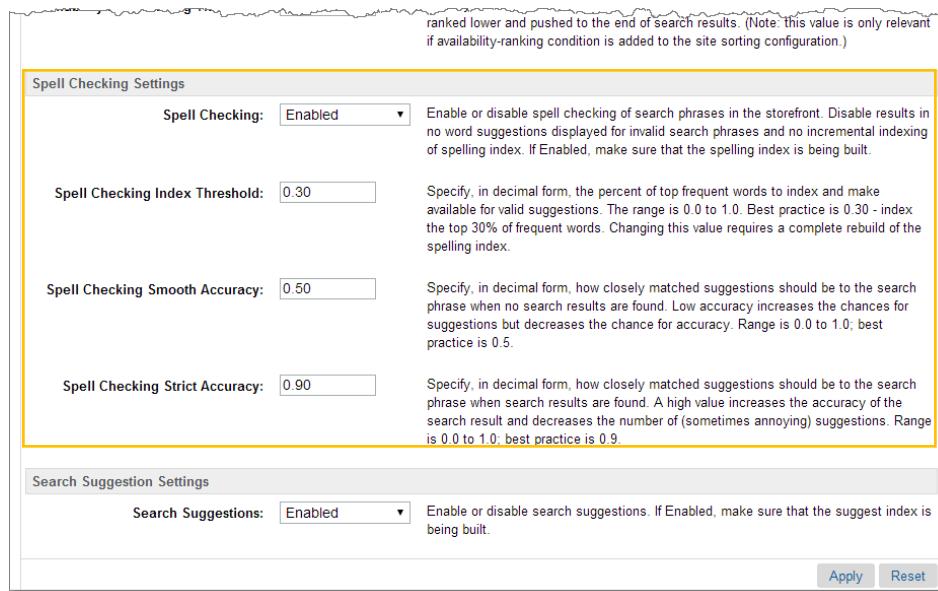
Apply **Reset** **Delete**



Lesson 7.11: Managing Spell Checking Settings

The Administrator should verify that spell checking has been enabled. They can set accuracy levels to avoid the *no results found* message when a customer spells a word incorrectly. Avoid making changes to the threshold and accuracy settings.

Go to Merchant Tools > Search > Search Preferences and scroll to the Spell Checking Settings section.

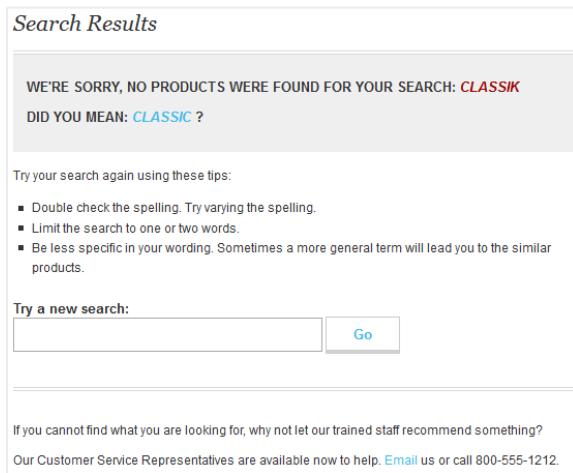


The screenshot shows the 'Spell Checking Settings' section of the search preferences. It includes four input fields with descriptions:

- Spell Checking:** A dropdown menu set to "Enabled". A note above it states: "ranked lower and pushed to the end of search results. (Note: this value is only relevant if availability-ranking condition is added to the site sorting configuration.)"
- Spell Checking Index Threshold:** An input field containing "0.30". A note below it says: "Specify, in decimal form, the percent of top frequent words to index and make available for valid suggestions. The range is 0.0 to 1.0. Best practice is 0.30 - index the top 30% of frequent words. Changing this value requires a complete rebuild of the spelling index."
- Spell Checking Smooth Accuracy:** An input field containing "0.50". A note below it says: "Specify, in decimal form, how closely matched suggestions should be to the search phrase when no search results are found. Low accuracy increases the chances for suggestions but decreases the chance for accuracy. Range is 0.0 to 1.0, best practice is 0.5."
- Spell Checking Strict Accuracy:** An input field containing "0.90". A note below it says: "Specify, in decimal form, how closely matched suggestions should be to the search phrase when search results are found. A high value increases the accuracy of the search result and decreases the number of (sometimes annoying) suggestions. Range is 0.0 to 1.0, best practice is 0.9."

Below this section is the "Search Suggestion Settings" section, which contains a single input field for "Search Suggestions" set to "Enabled".

When spell checking is enabled and the visitor misspells a product, an error message displays.



The screenshot shows a search results page with the following content:

Search Results

WE'RE SORRY, NO PRODUCTS WERE FOUND FOR YOUR SEARCH: **CLASSIK**

DID YOU MEAN: **CLASSIC** ?

Try your search again using these tips:

- Double check the spelling. Try varying the spelling.
- Limit the search to one or two words.
- Be less specific in your wording. Sometimes a more general term will lead you to the similar products.

Try a new search:

If you cannot find what you are looking for, why not let our trained staff recommend something? Our Customer Service Representatives are available now to help. [Email us](#) or call 800-555-1212.



Lesson 7.12: Search Query Processing

A search query processes once the relevant search parameters are passed to Business Manager:

- A customer enters a search query in the storefront. It can be a single or multi-word search phrase.
- The Demandware platform looks up any **redirects for the complete and exact search phrase**. If a redirect is found, the storefront displays the redirect page to the customer. Otherwise, the query parser processes the query using the following:
 - a. **Phrase Processor:** splits multi-word search phrases into parts. It detects phrases such as "back pack" and any negative terms, such as "-cargo".
 - b. **Cleansing Processor:** removes invalid characters from the user input: !() :[]{} +~^?'
 - c. **Product Number Processor:** splits alphanumeric terms into separate tokens.
 - d. **Brand Processor:** checks each part of the search phrase for misspelled brand names and adds the correct brand name as appropriate.
 - e. **Compound Words Processor:** searches for terms that exactly match an entry in the compound word dictionary. For example, if you configure *-hose, then 'herrenhosen' does not match, but 'herrenhose' does. The processor splits compound words into the configured parts.
 - f. **Common Phrase Processor:** identifies terms that must be searched as part of a phrase, rather than as individual terms or that must be searched as both a phrase and an individual term.
 - g. **Synonym/Hypernym Processor with Stemming:** looks up synonyms and hypernyms for each term and adds them to the search query. Synonyms and hypernyms are looked up with the stemmed form of the search term. For example, if the search term is 'hosen', then synonyms for 'hose' are found. The stemming used depends on the stemmer configured for the synonym index.
 - h. **Stopword Processor:** removes stop words from the search phrase.
 - i. **Cleansing Processor:** removes invalid characters from brands, synonyms, or hypernyms: !() :[]{} +~^?'
 - j. **Term Processor with Stemming:** translates the search phrase into its internal representation. All terms in the search phrase are stemmed.
- Execute Search and display the results

For details about search query processing, see the documentation.

Note: The maximum length for any search term is 50 characters.



Best Practices

- Define critical queries and test them. Then tune the search over time.
- Analyze the Top Search Terms report. Consider adding synonyms to the keywords that return few results and consider removing the filterable attributes when those keywords return many results.
- Mine the search results report for terms about top selling products and categories.
- Use Stopwords to remove the most frequent non-product terms. Frequently used terms may present opportunities to sell additional products in the future that are not currently on the storefront.
- Use care with Synonyms because they are hidden from the search results list. When a synonym is created that is ineffective, the additional results may confuse or irritate customers as noise.
- Use care with Redirects because when redirects are created the analytics for the search term are not saved.
- Searchable Attributes broadly affects what can be searched so use it with care.
- “Do not turn Searchers into Browsers” by performing a redirect to a category. This is important because “surgical shoppers” spend more than browsers.



Knowledge Check

1. Customers search for jobs on your site. Is it best to create a Stopword, a Redirect or a Searchable Attribute?
2. Some of my customers call them “jeans” and some people call them “dungarees.” How do you make sure everyone gets the same results?
3. Why would you want to redirect a search to a product?

Module 8: Sorting Rules

Objectives

Upon completion of this module, you will be able to:

- Influence the position of products on the storefront navigation
- Influence the position of products that result from a keyword search
- Create, modify and apply sorting rules
- Create, modify and apply dynamic sorting rules
- Manage storefront sorting options

Overview

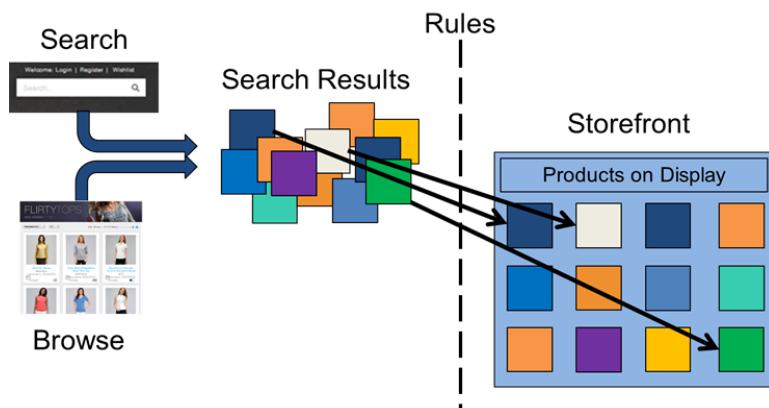
Sorting rules enable you to change the order of the products displayed on the storefront. You can apply the rules that you create to the search or you can set them as the default for a given category or all categories.

 Keyword Search Rule: Best Text Match 1. Text Relevancy	 Clearance Rule: High Inventory 1. Available-to-Sell (ATS)
 User-Selected Sort Rule: Price (High to Low) 1. Price, descending	 Gift Ideas Rule: High Profit 1. Dynamic Attribute [60% Gross Margin Amt 7d 40% Gross Margin % 7d
 Boots Rule: Top Movers 1. Dynamic Attribute [50% Sales Velocity last 7d 50% Conversion last 7d	 Spring Collection Rule: Best Sellers 1. Category Positioning 2. Dynamic Attribute [25% Revenue 30d 25% Units sold 30d 25% Orders 30d 25% Conversion 30d

Sorting rules:

- Supply the default order for the list of products that result from a keyword search
- Supply the default order for the products during category browsing
- Customers can use on the storefront to override default rules

In this example, both searching and browsing create a set of results. You can apply rules to those results so that they display on the storefront in order.

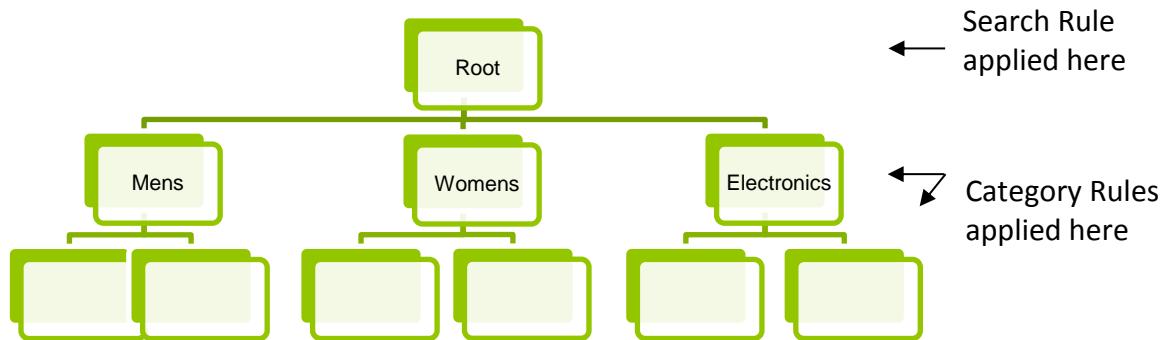


There are many ways to order products. Some possibilities include:

- List the most expensive products first
- Alphabetical by product name
- Show products before accessories

Applying Rules

Rules enable you to change the order in which products display. You can apply a single rule to on-site search—which is inherited. You can override them using category rules.



Category Results vs. Search Results vs. Storefront Options

You can set the *default* sorting order used to display products on the storefront. Multiple methods are used to set the default for category navigation separately from keyword search. The customer can override the default.

Changing Category Results

Manually change the order of products in a category

- Use the sorting arrows
- Use Category Position

Semi-automatically change the order of products in a category

- Create a rule using search placement or search rank
- Apply rule to category

Automatically change the order of products in a category using a rule

- Create a rule that uses dynamic data that changes
- Apply the dynamic rule to a Category

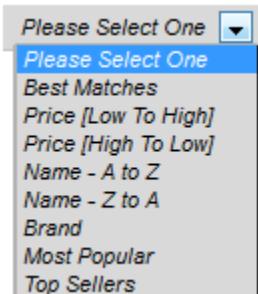
Changing Search Results

Automatically change the order of the results of the search

- Apply a rule to the Root (you might use Search Placement, Search Rank)

Storefront Sorting Options Menu

You can manage an optional menu on the storefront that enables a *customer* to change the sorting rule and override the default. For example:





Lesson 8.1: Manually Changing the Order of Products in a Category

To change the order of products in a category using the sorting arrows:

1. Go to **Merchant Tools > Products and Catalogs > Catalogs > {catalog} > {category} > Products**.
2. Click **Select All**.
3. Click **Sort**.

Products										
To sort products in the current category, select the products and click Sort. To remove products from sorting, select the products and click Unsort. To change the order of the sorted products, use the up and down buttons. To add new product to the category, click Assign. To remove products from the category, select these products and click Unassign.										
Select All	ID	Name	Catalog	Color	Refinement Color	Type	Status	View	Position	
<input type="checkbox"/>	22951021	Classic Wrap	Apparel Master Catalog			Variation Master		Edit		
<input type="checkbox"/>	25594754	Striped Multi Color Scarf	Apparel Master Catalog			Variation Master		Edit		
<input type="checkbox"/>	25594767	Solid Luxe Scarf	Apparel Master Catalog			Variation Master		Edit		
<input type="checkbox"/>	25594776	Floral Luxe Scarf	Apparel Master Catalog			Variation Master		Edit		
<input type="checkbox"/>	25594785	Multi Color Scarf	Apparel Master Catalog			Variation Master		Edit		

[Apply](#)

[Edit All](#) [Edit Selected](#)

[Sort](#) [Unsort](#) [Assign](#) [Unassign](#)

4. Select a product to move using the check box on the left.
5. Use the arrows to move the product up, to the top, down, or to the bottom. The position numbering will change automatically. There is no need to click **Apply**.

Category Position

Category Position can move the best selling or favorite products to the top of a given category. This can be done for one or all categories. The products in the category are numbered to indicate the order in which they should appear. This will not affect the order of the search results.

Important: Category Position is only applicable when visitors navigate to a category on your site. It is not applicable to keyword search.

Example: In a category you want to list three hero products first so you set them to positions 1, 2, 3.

Here, the Scarves category has multiple products listed within it:

Catalogs > Apparel Master Catalog > Womens > Accessories > Scarves

Scarves 

Edit

Categories

These are the sub-categories of the current category. To change the order of the sorted categories, use the up and down buttons to move selected categories. To add a category to the list of sorted categories, select the category and use the Sort button.

New

Category Links

These are categories linked to the current category. To change the order of the sorted categories, use the up and down buttons to move selected categories. To add a category to the list of sorted categories, select the category and use the Sort button.

Create Link

Products

To sort products in the current category, select the products and click Sort. To remove products from sorting, select the products and click Unsort. To change the order of the sorted products, use the up and down buttons. To add new product to the category, click Assign. To remove products from the category, select these products and click Unassign.

Select All	ID	Name	Catalog	Color	Refinement Color	Type	Status	View	Position	
<input type="checkbox"/>	22951021	Classic Wrap	Apparel Master Catalog			Variation Master	   	Edit		
<input type="checkbox"/>	25594754	Striped Multi Color Scarf	Apparel Master Catalog			Variation Master	   	Edit		
<input type="checkbox"/>	25594767	Solid Luxe Scarf	Apparel Master Catalog			Variation Master	   	Edit		
<input type="checkbox"/>	25594776	Floral Luxe Scarf	Apparel Master Catalog			Variation Master	   	Edit		
<input type="checkbox"/>	25594785	Multi Color Scarf	Apparel Master Catalog			Variation Master	   	Edit		

Apply

Preparation for Category Position

To manage the product positions within a category using numbers, you must first display the Position column by clicking **Unsort**. To un-sort the products in a category:

1. Navigate to the category.

The products in the category will be displayed at the bottom of the page.

2. Select all products in the category and click **Unsort**.

To set the rule for category position:

1. Edit the category.
2. Select the **Sorting Rule** tab.

3. Set the **Default Sorting Rule** to best-matches.
4. Once set, that rule will set the order of products in the category. The categories below will inherit the rule.

Setting Category Position Numbers

1. Using integers enter the position number into the position boxes on the right side of the products. The position numbers are relative to each other and do not need to be consecutive. Set the position of one or all products.
2. Click **Apply**.
3. The products will change order on the storefront.

Note: You do *not* need to re-index unless you are using a sandbox.



Demonstration: Sorting Rules

In a category, use the best-matches rule and Category Position to move best sellers to the top.



Practice: Change the Position Numbers of Products in a Category

1. Identify the products that currently display in the first and second positions on the storefront.
2. If necessary, change your category rule to use the rule **best-matches** rule.
3. Change the numbering of your products and click **Apply**.
4. Have the products changed their order on the storefront?
5. Use the Storefront Toolkit to view the reason for the position of each product.

Note: You do not need to re-index unless you are using a sandbox.



Lesson 8.2: Semi-Automatically Change the Order of Products in a Category

In this section, you will create a rule using search placement or search rank then apply the rule to a category.

Search Placement

Merchants can boost the importance of classes of products.

For a product or category or catalog root set **Search Placement** field to:

8 (Top Featured Product)

7 (Featured Product)

6 (Product)

5 (Secondary Product)

4 (Featured Accessory)

3 (Accessory)

2 (Spare Part)

1 (NLA Product)

Null is lowest

Note: “Top Featured Products” are “Best Sellers” or “Hero” products.

Search Placement sets the order of the products that display as a result of a storefront search. You can set the Search Placement attribute for categories and/or products.

Note: The Search Placement set for a product overrides the setting for the category, causing specific products to be shown higher or lower than the display of other products in a category.

Examples:

- When searching for “accessories,” show the hero bracelet and belt first.
- When searching for “leather,” show shoes before handbags before belts

8	Best Product	“Boxtoe” Shoe
7	Product Category	All Shoes
6	Product Category	All Handbags
5	Unused	
4	Unused	
3	Accessory Product	“Zebra” Belt
2	Accessory Category	All Belts
1	Unused	
Null	All Other Products	Mixed

Setting Search Placement in a Category

Edit the category and go to the **Category Attributes** tab. The value specified in the category will be inherited by all products in the category.

Catalogs > Storefront Catalog - EN - Category Attributes

General Site Assignments Image Settings Catalog Attributes **Category Attributes** Product Attribute Definitions Search

Storefront Catalog - EN

Fields marked with a red asterisk (*) are mandatory.

Select language:	<input type="button" value="Default"/>
Search Engine Optimization Support	
<input checked="" type="radio"/> Page Title:	<input type="text"/>
<input checked="" type="radio"/> Page Description:	<input type="text"/>
<input checked="" type="radio"/> Page Keywords:	<input type="text"/>
<input checked="" type="radio"/> Page URL:	<input type="text"/>
Sitemap Attributes	
Included:	<input type="button" value="- NONE -"/>
Change Frequency:	<input type="button" value="- NONE -"/>
Priority:	<input type="text"/> (Number) [0.00 - 1.00]
Presentation Attributes	
Thumbnail Image:	<input type="text"/>
Standard Image:	<input type="text"/>
Rendering Template:	<input type="text"/>
Category Landing Slot Image:	<input type="text"/>
Custom CSS File:	<input type="text"/>
Search Ranking	
Search Placement:	<input type="button" value="3 (Accessory)"/>
Search Rank:	<input type="button" value="1 (Low)"/>

Setting Search Placement in a Product

Search Ranking	
Search Placement:	<input type="button" value="3 (Accessory)"/>
Search Rank:	<input type="button" value="1 (Low)"/>
Custom	
Size Chart:	<input type="text"/>
Show in Menu Navigation:	<input type="checkbox"/>
Enable Compare:	<input type="checkbox"/>

The dropdown menu for Search Placement shows the following options:

- 3 (Accessory)
- NONE -
- 8 (Top Featured Product)
- 7 (Featured Product)
- 6 (Product)
- 5 (Secondary Product)
- 4 (Featured Accessory)
- 3 (Accessory)** (highlighted in blue)
- 2 (Spare Part)
- 1 (NLA Product)

Re-index the Site

The site must be re-indexed before the changes to Search Placement will take effect.

1. Go to **Merchant Tools > Search > Search Indexes**.
2. To select all the indexes, use the check boxes on the left.
3. Click **Reindex**.
4. To monitor the progress of the re-index click **Refresh**.



Demonstration: Create a rule called “Placement Only”



Practice: Change the Search Placement of Products in a Category

You have a category of shoes and want to move the shoe laces product to the bottom or you have a category of electronics and you want the batteries to be listed last. How can you do that?

1. Use your category and take note of the last product here: _____
2. In your **category**:
 - a. Reminder to Instructor: Prepare a sorting rule called Placement_Only
 - b. Change the Sorting Rule to use Placement_Only
 - c. Change the Search Placement field to 5
3. In one of your **products**, change the **Search Placement** field to 4
4. The site must be re-indexed before the changes will display.
5. View the result on the storefront.
6. Use the **Toolkit** to see why they changed positions.

Search Placement
8 Unused
7 Unused
6 Unused
5 All products in your category
4 Single product
3 Unused
2 Unused
1 Unused
Null Unused – Note: This is important!

Search Rank

You can explicitly boost the importance of product or classes of products using Search Rank. This can be applied to a keyword search or to a category.

In many ways, Search Rank is similar to Search Placement. You can use them independently or together.

For a product or category or catalog root set “Search Rank” field to:

- 3 (High)
- 2 (Medium)
- 1 (Low)

NULL is the lowest.

Example: When a customer searches for “iPod” you want to change the order of the results so the regular iPod is shown before the Nano or Shuffle.

In many situations, you can use Search Placement alone. If you need more distinctions, you can combine Search Placement and Search Rank in this manner:

	1 Low	2 Medium	3 High
8 Top Featured Product			Highest
7 Featured Product			
6 Product			
5 Secondary Product			
4 Featured Accessory			
3 Accessory			
2 Spare Part			
1 NLA Product	Lowest		

The settings for Search Placement and Search Rank can be made in categories, individual products or both. These settings can also be made in bulk.

To view the **Search Ranking** attribute group, go to **Products and Catalogs > {a category} > Category Attributes** tab. It looks like this:

Search Ranking	
Search Placement:	6 (Product) <input type="button" value="▼"/>
Search Rank:	3 (High) <input type="button" value="▼"/>

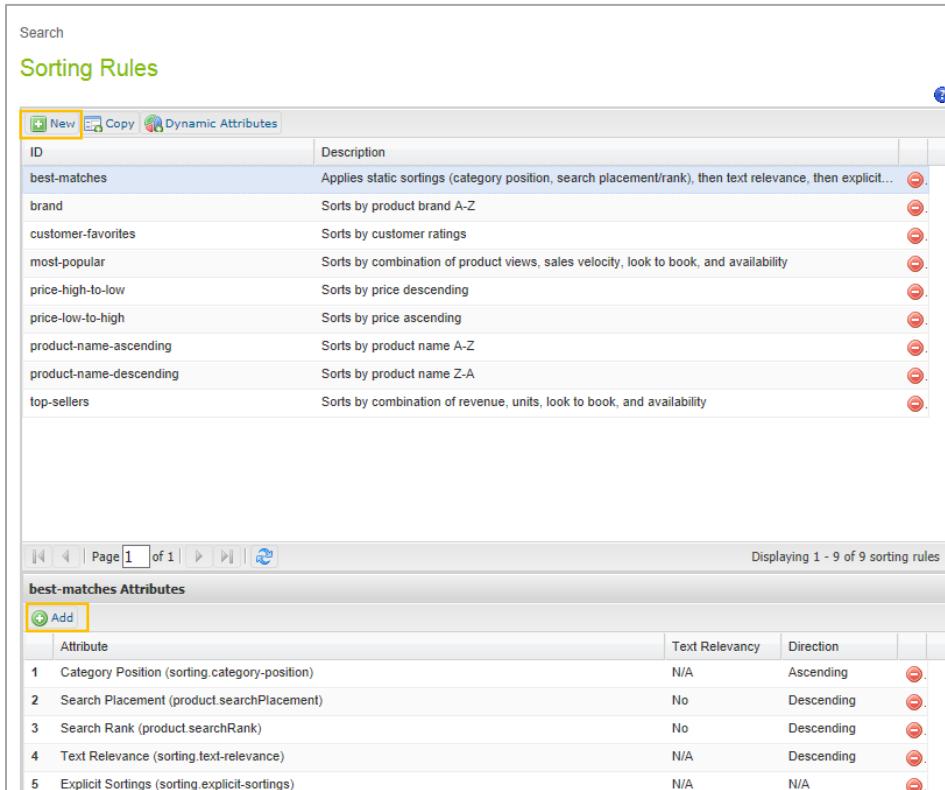
Example: You have two categories, womens-jackets and mens-jackets. If a customer does a search for “jackets” then the results are mixed. If you set the Search Placement or Search Rank for the womens-jackets to be higher than the setting for mens-jackets then all of the women’s jackets will appear first. The result is no longer mixed.

Creating a Rule

You can create rules with attributes. When rules applied to a category, rules change the sorting order of the products in a category. The attribute describes the order.

To create a rule:

1. Go to **Merchant Tools > Search > Sorting Rules**.
2. Click **New**.



The screenshot shows the Demandware Merchant Tools interface. The main window title is "Sorting Rules". At the top left, there are buttons for "New", "Copy", and "Dynamic Attributes". Below this is a table listing various sorting rules:

ID	Description
best-matches	Applies static sortings (category position, search placement/rank), then text relevance, then explicit...
brand	Sorts by product brand A-Z
customer-favorites	Sorts by customer ratings
most-popular	Sorts by combination of product views, sales velocity, look to book, and availability
price-high-to-low	Sorts by price descending
price-low-to-high	Sorts by price ascending
product-name-ascending	Sorts by product name A-Z
product-name-descending	Sorts by product name Z-A
top-sellers	Sorts by combination of revenue, units, look to book, and availability

At the bottom of this table, there is a message: "Displaying 1 - 9 of 9 sorting rules".

Below the main table, there is a sub-table titled "best-matches Attributes" with a "Add" button highlighted. This sub-table lists attributes with their text relevancy and direction:

	Attribute	Text Relevancy	Direction
1	Category Position (sorting.category-position)	N/A	Ascending
2	Search Placement (product.searchPlacement)	No	Descending
3	Search Rank (product.searchRank)	No	Descending
4	Text Relevance (sortling.text-relevance)	N/A	Descending
5	Explicit Sortings (sorting.explicit-sortings)	N/A	N/A

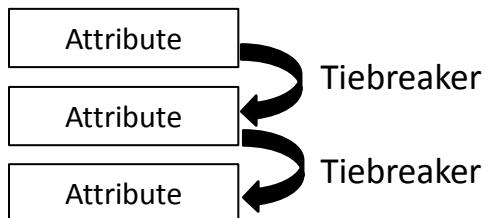
3. Give the rule an ID and Description.
4. Click **Add**.
5. Select the attribute.
6. Click **Apply**.

Layering the Attributes in a Rule

Rules can have layered attributes so that you can apply multiple attributes at the same time. This is useful when different attributes will specify the products at the top, middle and bottom of a category.

When multiple attributes are added to a rule, the higher attribute overrides the attributes below them.

Rule



Example: For the sorting rule called: position-then-margin

- Sort 1st by category position - Explicit positioning is obeyed
- Sort 2nd by margin last 30 days - The remaining products sort by margin
- Sort 3rd by text relevancy - If there's a tie, it's determined by text

Sorting rules support multiple sorting levels; this enables a category to be sorted in multiple ways.

Example: the rule called best-matches has these five attributes:

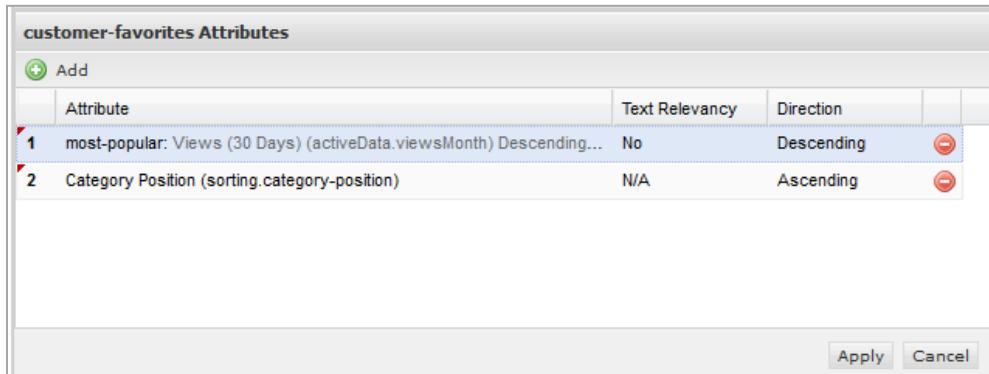
best-matches Attributes				
	Attribute	Text Relevancy	Direction	
1	Category Position (sorting.category-position)	N/A	Ascending	
2	Search Placement (product.searchPlacement)	No	Descending	
3	Search Rank (product.searchRank)	No	Descending	
4	Text Relevance (sorting.text-relevance)	N/A	Descending	
5	Explicit Sortings (sorting.explicit-sortings)	N/A	N/A	

Apply **Cancel**

Changing the Order of Attributes in a Rule

Rules can combine multiple attributes. You can change the order of the attributes using drag and drop.

Example: In the customer-favorites rule has attributes, most-popular and Category Position. When creating a rule in **Merchant Tools > Search > Sorting Rules**, then Attribute 2 can be dropped above Attribute 1.



Attribute	Text Relevancy	Direction
1 most-popular: Views (30 Days) (activeData.viewsMonth)	Descending	No
2 Category Position (sorting.category-position)	Ascending	N/A

Apply Cancel

There are many attributes available, which are grouped:

- Standard attributes (i.e. Price)
- Product attributes (i.e. Color)
- Active Data attributes (i.e. Impressions)
- Availability model attributes (i.e. ATS)
- Dynamic attributes (these are custom)



Lesson 8.3: Automatically Changing Product Order in a Category

You can manage the order of products in a category by applying a dynamic sorting rule to the category.



Practice: Review the List of Existing Attributes to Apply to a Rule

1. Go to **Merchant Tools > Search > Sorting Rules**.
2. Click **New**.
3. Click **Add**.
4. Review the dropdown list of attributes that can be applied to a rule. In the future these may be useful for you to apply to certain categories.

Dynamic Sorting Rules

A dynamic attribute's value is calculated through a formula that you create. This enables you to create weighted blends of different attributes to use when sorting.

Example: To push new products and best-selling products to the top, create a dynamic attribute that blends *Days Available* and *Sales Velocity*.

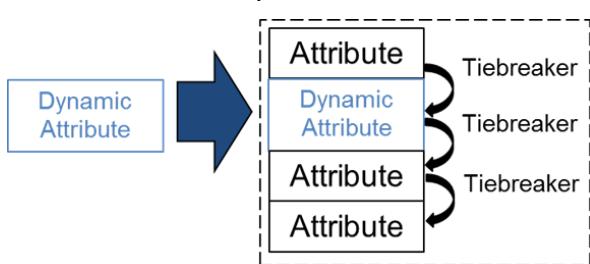
Note: In many cases, you can use a single attribute to create the sorting order for a category. That single attribute can be put into a rule and the rule can be applied to a category. The price rule you created earlier is an example of a dynamic rule with a single attribute.

Add Dynamic Attributes to a Rule

- The order of attributes is important, making the first attribute the most important
- If the existing attributes do not fulfill your needs, you can create a new dynamic attribute.

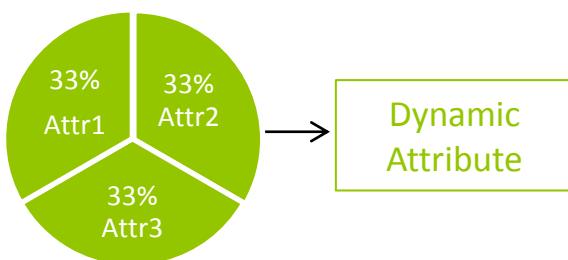


- Insert the dynamic attribute into the rule:



Creating Dynamic Attributes

A new attribute can **blend** multiple attributes by using a percentage to set the weighting of the attributes that create a new attribute.



Example: A new blended attribute "selling-quickly" is a weighted score where

- 60% is based on sales velocity last 7 days
- 40% is based on availability, include text relevancy

Example: New dynamic attribute “RU” is a blend of multiple attributes where

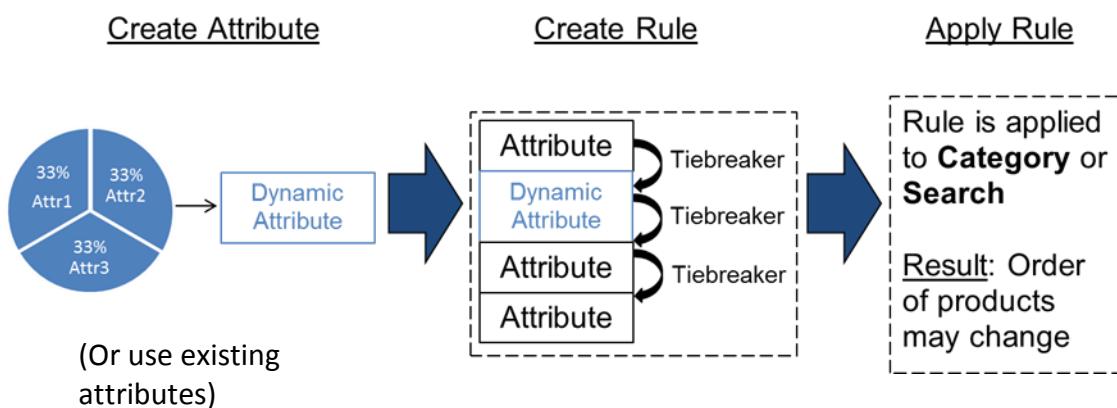
- RU = 50% is based on Revenue and 50% is based on Units Sold in 30 days.

Dynamic sorting rules have built-in handling for:

- Special product types
 - Aggregating online product variations for product masters
 - Aggregating online products for products within product sets
- Products without data
 - Merchant can specify default value: maximum, average or minimum
 - Specify the default value for new, stale or undefined data

Example: You have new products that have no 30 day revenue data. Without data they would sort to the bottom. You feel they are exciting new products so you set the default value to Maximum.

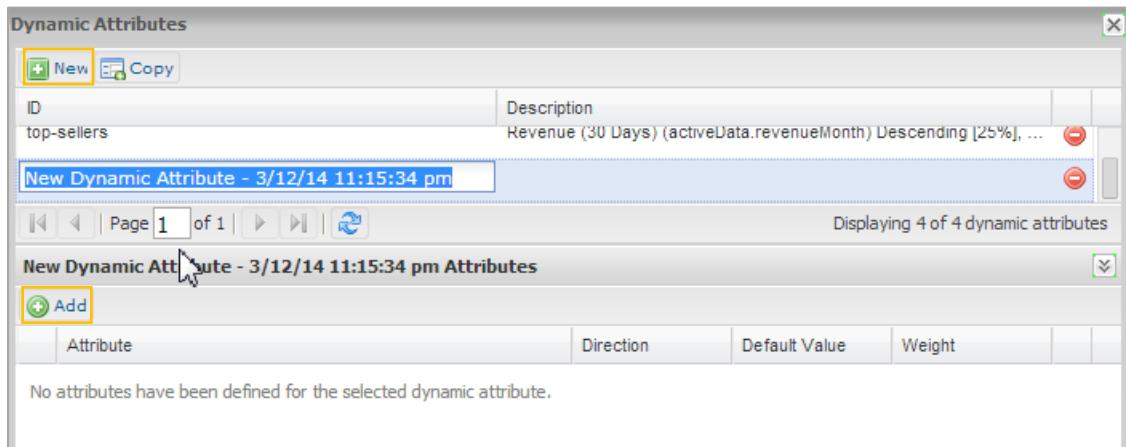
This diagram is a summary of the process for creating and applying rules. Many attributes exist by default so it is not necessary to create an attribute.



Creating Dynamic Attributes

1. Go to **Merchant Tools > Search > Sorting Rules**.
2. Click **Dynamic Attributes**.

3. Click **New**.



The screenshot shows the 'Dynamic Attributes' dialog box. At the top, there are 'New' and 'Copy' buttons. Below is a table with columns 'ID' and 'Description'. A row for 'top-sellers' is selected, showing a description of 'Revenue (30 Days) (activeData.revenueMonth) Descending [25%], ...'. Below the table is a message: 'New Dynamic Attribute - 3/12/14 11:15:34 pm'. Underneath is another table titled 'New Dynamic Attribute - 3/12/14 11:15:34 pm Attributes' with a single 'Add' button. A note says 'No attributes have been defined for the selected dynamic attribute.' The status bar at the bottom right says 'Displaying 4 of 4 dynamic attributes'.

4. Give the rule a unique ID.

Note: that the Description is filled in automatically.

5. Click **Add** to blend one or many dynamic attributes.

6. Click **Apply**.



Practice: Create a Sorting Rule

1. Create a sorting rule that orders products by price. The results will be easy to see on the storefront.
2. Apply it to your category.
3. That category will have its products ordered by price. View it on the storefront.

Optional:

Create a sorting rule using multiple sort layers:

- Category Positioning
- Product Search Placement
- Product Search Rank
- Text Relevancy
- Use sorting rule storefront preview to review presentation results with and without search term

Configure a dynamic sorting attribute, preview results

- Use sorting rule storefront preview to review presentation results with and without a search term

Hint: Try using the number of products sold + revenue because it is best to sell a lot and to make a lot.



Lesson 8.4: Inserting the Rule

When you apply a rule to a category, the sub-categories inherit that rule. If you apply a rule to the catalog root, then **every** category inherits that rule unless an explicit category rule overrides it.

You can apply rules to:

- The root catalog level – this is the top of the hierarchy
- Any individual category – this affects the given category and any sub-categories
- Storefront Sorting Rule – the storefront may allow the visitor to select a rule to override the default rule in a category



Practice: Apply a Rule to a Category

1. View your category on the storefront with the default rule.

2. Assign your new sorting rule (with *price*) to your category.

Note: You do *not* need to re-index unless you are using a sandbox.

3. View the sorting results on the storefront.

4. Verify with the toolkit.



Lesson 8.5: Automatically Changing the Order of the Search Results

When a customer performs a search on the storefront, a list of products displays on a product listing page. Here are the results for a search for “cotton.”

The screenshot shows a storefront search results page for "cotton". The results are displayed in a grid format with three items per row. Each item includes a thumbnail image, the product name, price range, and a product rating scale.

Product	Price Range	Product Rating
Cotton Straight Shorts	\$140.0 - \$145.0	5 stars (1)
Cotton Stretch Pant	\$185.00	5 stars (1)
Cotton Turtleneck Sweater	\$89.00 - \$99.99	5 stars (1)

You can create a rule that changes the order of these products by applying a sorting rule to the root of the storefront catalog:

1. Go to **Merchant Tools > Catalogs > {Storefront Catalog}**.
2. Click **Edit**.
3. Click the **Sorting Rule** tab.
4. Select a sorting rule from the drop-down list. This list will contain new rules as soon as you create them.



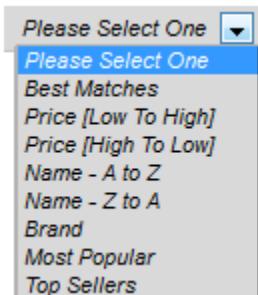
Default Sorting Rule: best-matches ▾

5. Click **Apply**.



Lesson 8.6: Storefront Sorting Options Menu

Customers see the dropdown options menu on the storefront. There is a single menu for each storefront site. The customer can override the default rule in the category by selecting from a menu:



Please Select One ▾

- Please Select One
- Best Matches
- Price [Low To High]
- Price [High To Low]
- Name - A to Z
- Name - Z to A
- Brand
- Most Popular
- Top Sellers

You can control this options menu to predefine:

- **Rules** to display
- **Order** of the rules – and the default rule
- **Display names** – The names displayed are independent of the rules

To create a new option in the Storefront Sorting Options:

1. Go to **Merchant Tools > Search > Storefront Sorting Options**.
2. Click **New** or click an existing ID.

Storefront Sorting Options > price-low-to-high

price-low-to-high

Fields marked with a red asterisk (*) are mandatory. Click Apply to save your changes. Click Cancel to return to the previous screen without creating a sorting option.

Select language:	<input type="button" value="Default"/>	<input type="button" value="Apply"/>
ID:	price-low-to-high	
Display Name:	Price Low To High	
Sorting Rule:	<input type="button" value="price-low-to-high"/>	<input type="button" value="▼"/>
Description:	<input type="text"/>	
<input type="button" value="Apply"/> <input type="button" value="Reset"/>		

3. Select the language.
4. Enter a unique ID.
5. Enter a Display Name that will show on the storefront.
6. Select the Sorting Rule from the list.
7. Enter a Description.
8. Click **Apply**.



Practice: Modify the Storefront Sorting Options Dropdown List

1. You created a sorting rule earlier.
2. Assign your sorting rule to the storefront.
3. Change the Display Name for the rule on the storefront.
4. View and test the changes to the Storefront Sorting Options on the storefront.



Best Practices

- When changing the Storefront Sorting Options use few rules. Keep them obvious to the customer.
- Start simply with rules, you may only need one attribute: Search Placement.
- Test by defining critical queries and verify and tune those queries over time.
- Keep it simple when you begin using dynamic sorting rules and remember that dynamic data is not available until after site launch.

Module 9: Search Refinements

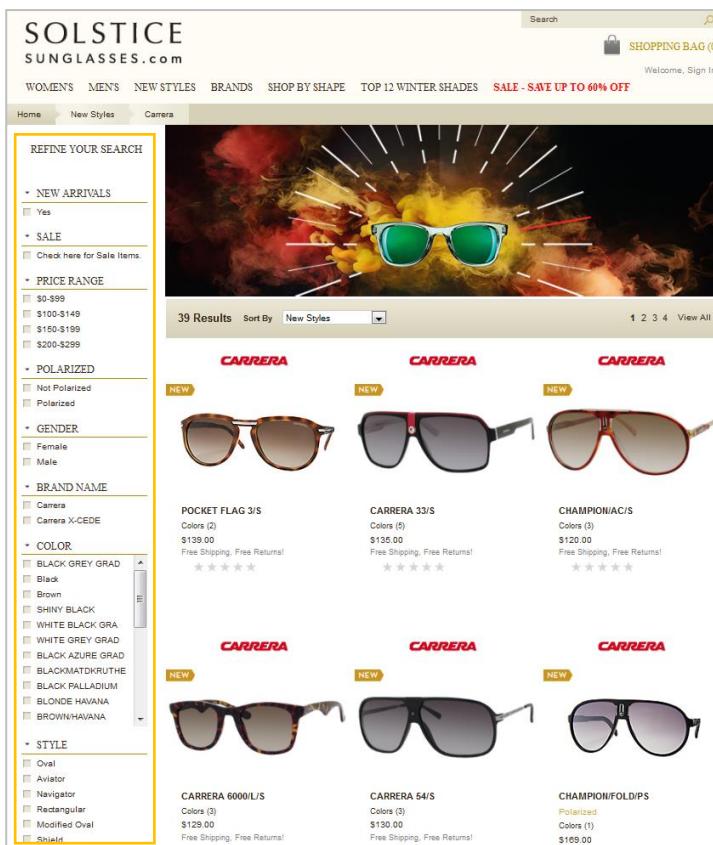
Objectives

Upon completion of this module, you will be able to:

- Configure site-wide search refinements
- Configure category search refinements
- Create and manage buckets

Overview

Search refinements enable the customer to filter products by attribute.



The screenshot shows the SOLSTICE SUNGLASSES.com homepage. On the left, there is a sidebar titled "REFINE YOUR SEARCH" with the following filters:

- NEW ARRIVALS**: Yes, Sale (checkboxes)
- SALE**: Check here for Sale Items (checkbox)
- PRICE RANGE**: \$0-\$99, \$100-\$149, \$150-\$199, \$200-\$299
- POLARIZED**: Not Polarized, Polarized
- GENDER**: Female, Male
- BRAND NAME**: Carrera, Carrera X-CEDE
- COLOR**: BLACK/GREY GRAD, Black, Brown, SHINY BLACK, WHITE BLACK GRA, WHITE GREY GRAD, BLACK/AZURE GRAD, BLACKMATDKRUTHE, BLACK PALLADIUM, BLONDE HAVANA, BROWN/HAVANA
- STYLE**: Oval, Aviator, Navigator, Rectangular, Modified Oval, Shield

The main content area features a large banner with sunglasses and a "REFINE YOUR SEARCH" sidebar. Below the banner, there are two rows of sunglasses. The first row includes:

- CARRERA** POCKET FLAG 3/S: NEW, Colors (2), \$139.00, Free Shipping, Free Returns!
- CARRERA** 33/S: NEW, Colors (5), \$135.00, Free Shipping, Free Returns!
- CARRERA** CHAMPION/AC/S: NEW, Colors (3), \$120.00, Free Shipping, Free Returns!

The second row includes:

- CARRERA** CARRERA 6000/L/S: NEW, Colors (3), \$129.00, Free Shipping, Free Returns!
- CARRERA** 54/S: NEW, Colors (3), \$130.00, Free Shipping, Free Returns!
- CARRERA** CHAMPION/FOLD/P/S: NEW, Polarized, Colors (1), \$169.00

Use these refinements to:

- Filter results
- Set sorting mode
- Set sorting direction
- Set cutoff
- Set their order for display



Lesson 9.1: Configuring Search Refinements for a Site

To configure search refinements for an entire site:

1. Go to your storefront catalog.
2. Select the **Search Refinement Definitions** tab.
3. Click **New** to add a new search refinement.
4. Use the sorting arrows to change the order of the refinements.



Lesson 9.2: Using Buckets

Buckets reduce the quantity of refinements that are displayed on the storefront and they can enforce the order of values that display. Buckets are typically used for size, price and color.

Examples:

- A *red* bucket might contain: candy apple, cherry, fire, maroon, rose, ruby
- You might need to enforce the order of values for size.
 - Alphabetically it would display as: L, M, S, XL, XS
 - Using buckets, you can correct that order to display as: XS, S, M, L, XL

To create a new bucket:

1. Go to **Merchant Tools > Products and Catalogs > Catalogs**.
2. Edit the storefront catalog.

3. Select the Search Refinement Definitions tab.

Catalogs > Storefront Catalog - EN - Search Refinement Definitions

General Site Assignments Image Settings Catalog Attributes Category Attributes Product Attribute Definitions **Search Refinement Definitions** Sorting Rule

Storefront Catalog - EN

This list shows all search refinement definitions of this catalog category and all inherited search refinement definitions of parent categories if any exists. You can manage the most important attributes of existing refinement definitions for this category directly in the list below.

You can block or unblock an existing inherited search refinement definition with the links Block and Unblock.

Click Apply to save your changes. Click Delete to delete existing refinement definitions and click New to create new definitions.

Select All	Refinement Type	Display Name	Value Set	Sorting Mode	Sorting Direction	Bucket Type (Count)	Sorting
<input type="checkbox"/>	By Category	Category	Search Result Values	Sort By Category Position	Descending	None (0)	<input type="button" value="Up"/> <input type="button" value="Down"/>
<input type="checkbox"/>	By Attribute (Refinement Color)	Color	All Values of Category	Sort By Bucket Position	Ascending	Values (14)	
<input type="checkbox"/>	By Price	Price	Search Result Values	Sort By Price Threshold	Ascending	Thresholds (12)	
<input type="checkbox"/>	By Attribute (New Arrival?)	New Arrival	Search Result Values	Sort By Value Name	Ascending	None (0)	
<input type="checkbox"/>	By Attribute (Brand)	By brand	Search Result Values	Sort By Value Name	Ascending	None (0)	

Apply **Reset** **New** **Delete**

4. Click a Refinement Type such as “By Attribute (Refinement Color).”

Catalogs > [Storefront Catalog - EN - Search Refinement Definitions](#) > Search Refinement Definition

Storefront Catalog - EN - Update Search Refinement Definition

Fields marked with a red asterisk (*) are mandatory. Click Apply to save your changes. Click Cancel to return to the previous screen without creating a search refinement definition.

Select language:	Default
Name:	Color
Refinement Type:	Attribute Refinement
Attribute ID:	refinementColor
Value Set:	All Values of Category
Bucket Type:	Values
Unbucketed Values:	Shown as individual values
Sorting Mode:	Sort By Bucket Position
Sorting Direction:	Ascending
Cutoff Threshold:	5

Apply **Reset**

- **Name** should contain what you would like to display on the storefront.
- **Value Set** is a choice between all values in a category or just the search result values.
- **Sorting Mode** describes the sort order of the results.
- **Bucket Type** shows a count of the number of refinements in the bucket. In this example, there are 14 refinement colors.
- **Sorting arrows** enable you to move a refinement up or down within the list on the storefront.

5. Set the options and click **Apply**.

You can update, sort, and delete buckets:

- In the **Attribute Refinement Buckets** section, enter the **Bucketed Values**, **Bucket Display**, and **Bucket Presentation ID**.

Attribute Refinement Buckets

The list below allows you to manage the value buckets used when refining searches by this attribute. The bucket display name will be used as refinement option whenever the actual product value matches one of the bucketed value that are defined here as comma separated list.

The bucketed values need to be provided per locale in case the attribute you refine on is defined as localized attribute. Please consider following escaping rules: \, will match the character '' and \\ will match the character '\'. As an alternative click [Manage values](#) to manage all bucket values.

Search Attribute Refinement Buckets					
Value or Display Value:		Find			
Select All	Bucketed Values	Bucket Display	Bucket Description	Bucket Presentation ID	Sorting
<input type="checkbox"/>	beige	Beige		beige	-
<input type="checkbox"/>	black	Black		black	-
<input type="checkbox"/>	blue	Blue		blue	-
<input type="checkbox"/>	navy	Navy		navy	-
<input type="checkbox"/>	brown	Brown		brown	-
<input type="checkbox"/>	green	Green		green	-

[Manage values](#)

Note: You can instead click **Manage values** to manage bucket value.

To create a new search refinement:

- Add an attribute to a product (if necessary).
- Fill the attribute with data (possibly using batch to fill the attribute in every product).
- Create the search refinement.



Lesson 9.3: Configuring Search Refinements for a Category

Specify category level search refinement properties in **Merchant Tools > Products and Catalogs > Catalogs > Category**, noting the attribute by which to filter results, as well as the display name, sorting mode, and direction. Merchants can define buckets for values as well.

To add a search refinement:

- Navigate to a category.
- Edit the category.
- Click the **Search Refinement Definitions** tab.
- Click **New**.

5. Select the attribute to add.
6. Fill in the fields. Click **Apply**. The new attribute displays.
7. Re-index the Product index.
8. View the new Search Refinement in the Storefront.
9. In the **Action** column, use the **Block** option to avoid inheriting refinement options.

To edit the bucket values:

1. Click the refinement type.
2. Click [...] to edit the search refinement buckets.



Exercise

Use Business Manager to identify the location of the following items:

- View a product in Business Manager
- View the product price
- View recommendations
- View inventory
- Advanced Search
- Product Set
- Toolkit
- List of Variation Products
- The button to assign a Product to a Category
- Redirect
- Synonym
- List of Sorting Rules
- A sorting rule that's been applied to a Category
-

Module 10: Qualifiers

Objectives

Upon completion of this module, you will be able to:

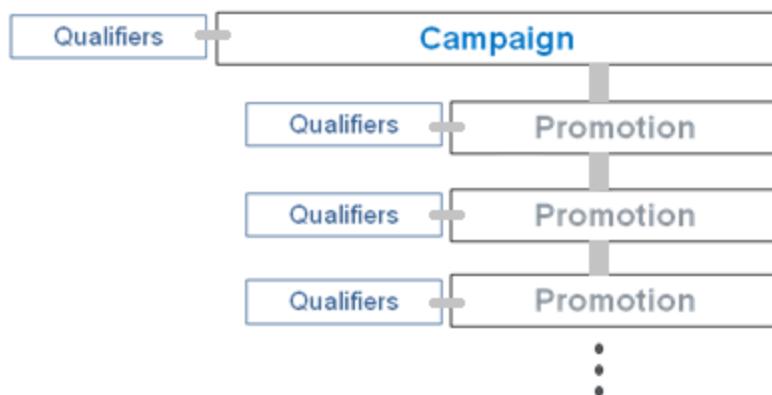
- Create, configure, and manage coupons
- Create system-generated coupons
- Create, configure, and manage source-code groups
- Associate a source-code with a price book as well as with a campaign
- Create static and dynamic customer groups

Overview

You can use Business Manager to create many different promotions. You use qualifiers to specify who can receive the promotion. Use Business Manager to control the following types of qualifiers.

- Coupon codes – the customer enters them on the storefront during the checkout process.
- Source-codes - are included in hyperlinks that direct customers to a web page as part of your email marketing and affiliate marketing campaigns.
- Customer groups are specific groups of people that can be specified as a list or with a rule.

Qualifiers turn on a campaign or promotion. Each campaign needs at least one qualifier to access the associated promotion. It is possible to have multiple qualifiers to gain access to the promotions.





Discussion

- Do you plan to use coupons to trigger promotions?
- Do you plan to use hyperlinks in email campaigns?
- Do you do affiliate marketing?
- Do you plan to do marketing promotions to specific groups of customers?



Lesson 10.1: Using Coupons

Coupons are a common merchandising tool used to drive site traffic and sales revenue. For online merchandising, they are often distributed via email or promoted directly on the website in banner messaging. The customer adds the coupon code to the cart in order to secure some type of discount.

In Business Manager, you can create a single coupon or generate thousands of coupons automatically. Coupons can be imported and exported. Each coupon can be passed to others but you can limit the redemptions of a coupon.

The following coupon types are available to satisfy different business requirements:

- Merchant-defined single coupon codes (i.e. FREESHIP14)
- Merchant-defined multiple coupon codes (i.e. SPECIAL1, SPECIAL2, ...)
- System generated multiple coupon codes with an optional merchant specified prefix
(i.e. SHIP-ABCU-L4QX-6UBL-C8WM)

Note: A coupon is not valid until it is linked to a promotion. The coupon gives the code while the promotion gives the discount.

Note: The distribution of coupons occurs outside of Demandware.

When offering a promotion to a customer via a coupon, the customer redeems the coupon in the shopping cart or at checkout. The coupon code is case sensitive but your site implementation may force the coupon code to be upper/lower case only.

Your Shopping Cart

PRODUCT	QTY	PRICE	TOTAL PRICE
 <i>Long Sleeve Embellished Boat Neck Top</i> Item No: 701642823919 Color: Grey Heather Size: L Edit Details	1	Remove Add to Wishlist Add to Gift Registry In Stock	\$49.00 \$28.99 \$28.99
ENTER COUPON CODE <input type="text"/> <input type="button" value="Apply"/>		<input type="button" value="Update Cart"/> Subtotal \$28.99 Shipping N/A Sales Tax N/A Estimated Total \$28.99	

Configuring Coupons

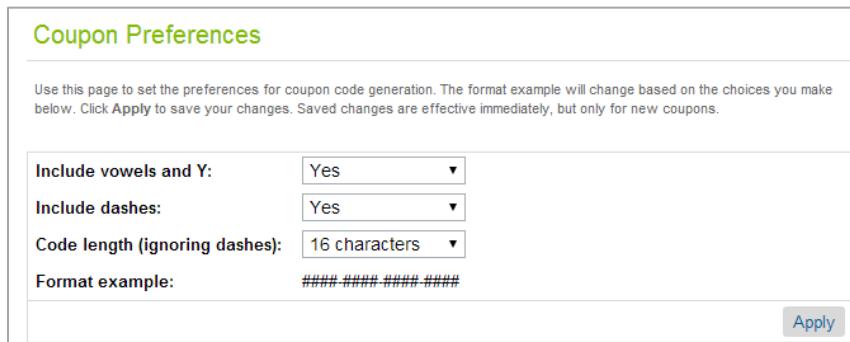
Site Administrators can configure system generated coupons.

System generated coupons can be configured in multiple ways:

- Include vowels and Y – Yes include vowels and Y, No removes them. Removing vowels and Y prevents swear words from being randomly created.
- Include dashes – Yes inserts three dashes in the code, No removes them.
- Code length – select the system generated coupon code length, either 12 characters and 16 characters (in addition to the prefix).

To configure coupons:

1. Go to **Merchant Tools > Site Preferences > Coupons**.



The screenshot shows the 'Coupon Preferences' page with the following settings:

- Include vowels and Y: Yes
- Include dashes: Yes
- Code length (ignoring dashes): 16 characters
- Format example: ##### #### ##### ####

An 'Apply' button is located at the bottom right of the form.

2. Change or review the settings.
3. Click **Apply**.

Redemption Limits

Coupons can enable promotions, people can distribute them by email to others and multiple coupons can be entered into the same cart at checkout.

You can set coupon redemption limits to prevent abuse of coupons and to control margins, using the following options:

- Redemptions Per Coupon Code – defines the number of times each coupon code can be used
- Redemptions Per Customer – defines the number of times a customer can use each coupon
- Redemptions Per Time Period – specify how many times each coupon can be used in the given number of days

Examples:

- For multiple use and widespread sharing, use unlimited/unlimited/unlimited
- For a coupon to be used once then never again, 1/unlimited/unlimited
- For a person to use a coupon once and share it, unlimited/1/unlimited



Lesson 10.2: Creating Coupons

Creating a Single Coupon Code

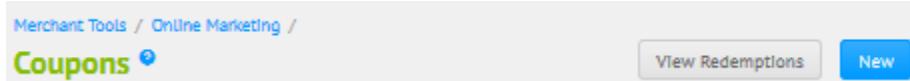
You can define a single coupon code, which can be: 1 to 256 characters in length using alphanumeric and underscore characters. The customer must enter the code in the cart at checkout.



Demonstration: Create a Coupon for Facebook Sharing

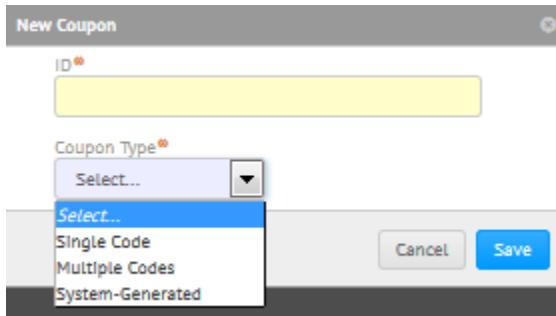
To create a coupon that customers can pass around Facebook with the code, FACEBOOK2015:

1. Go to **Merchant Tools > Online Marketing > Coupons**.



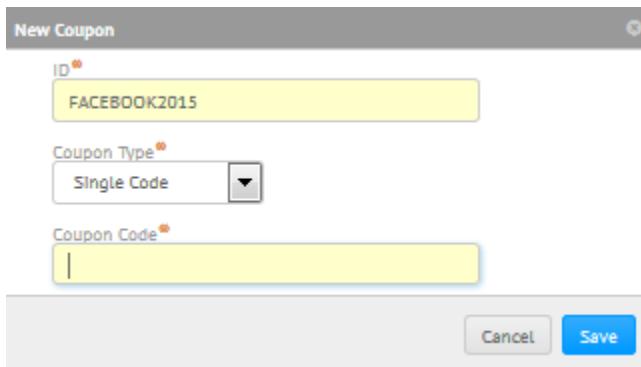
The screenshot shows the 'Coupons' section of the Demandware Merchant Tools. At the top, there are links for 'Merchant Tools / Online Marketing / Coupons'. Below this, there are two buttons: 'View Redemptions' and a blue 'New' button. The 'New' button is highlighted with a yellow box.

2. Click **New**.



The screenshot shows the 'New Coupon' dialog box. It has fields for 'ID' (containing a placeholder) and 'Coupon Type'. A dropdown menu is open, showing options: 'Select...', 'Single Code', 'Multiple Codes', and 'System-Generated'. The 'Single Code' option is highlighted with a yellow box. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

- a. Enter a unique ID.
 - b. For **Coupon Type**, select **Single code**.
3. Click **Save**.
 4. Enter a **Coupon Code**.



The screenshot shows the 'New Coupon' dialog box again. The 'ID' field now contains 'FACEBOOK2015'. The 'Coupon Type' dropdown is set to 'Single Code'. The 'Coupon Code' field is empty, indicated by a single vertical bar. The 'Save' button is visible at the bottom right.

5. Click **Save**.

Edit Coupon shipping

<p>General</p> <p>Coupon Codes</p> <p>Assignments</p> <p>Redemptions</p>	<p>ID* shipping</p> <p>Description coupon used with shipping promotions</p> <p>Enabled <input style="width: 100px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-bottom: 5px;" type="button" value="No"/> <input style="width: 20px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-left: 10px;" type="button" value="Yes"/></p> <p>Coupon Type* Single Code</p> <p>Redemption per Coupon Code <input type="text" value="Unlimited"/></p> <p>Redemption per Customer <input type="text" value="Unlimited"/></p> <p>Redemption per Time Period <input type="text" value="Unlimited"/> Redemptions per <input style="width: 20px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-left: 10px;" type="text"/> Days</p>
---	--

6. Enable the coupon.
7. Set the Redemption Limits.
8. Click **Save**.

Creating Multiple Coupon Codes

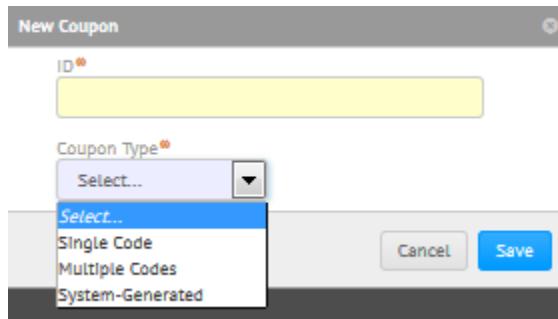
You can define multiple coupon codes that act in the same manner because they share a unique coupon ID.



Demonstration: Creating Multiple Coupon Codes

The coupon code, SUMMER21, and the coupon code, SUMMER22, could both enable the same promotions. Applying either code would yield the same results.

1. Go to **Merchant Tools > Online Marketing > Coupons**.
2. Click **New**.



- a. Enter a unique ID.
- b. For **Coupon Type**, select **Multiple codes**.
3. Click **Save**.
4. Enable the coupon and set the redemption limits.
5. On the **Coupon Codes** tab, click **Add**. Enter the code for the coupon. Repeat for each coupon to add.



6. Click **Save**.
7. Assign the coupon to a campaign (This is optional and can be done later). Click **Save**.

Creating System Generated Coupons

Demandware can automatically generate coupons, using a prefix followed by 12 or 16 characters. This makes it easy to generate a large number of unique coupon codes.



Demonstration: Creating System Generated Coupons

You want to announce a promotion to 5000 customers using email so you generate 5000 coupon codes and export them. Then, you can send the file of coupon codes to your marketing team to incorporate in their email messages.

To create multiple coupons:

1. Go to **Merchant Tools > Online Marketing > Coupons**.
2. Click **New**.

New Coupon

ID*	July2015Dresses
Coupon Type*	System-Generated
Number of Codes*	1
Coupon Prefix*	
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

- a. Enter a unique ID.
- b. For **Coupon Type**, select **System-generated codes**.
- c. Enter the number of codes you would like to generate.
- d. Enter a coupon prefix that to place in front of each generated code.
3. Click **Save**.
4. Enable the coupon and set the redemption limits.
5. Click **Save**.

Import/Export of Coupons

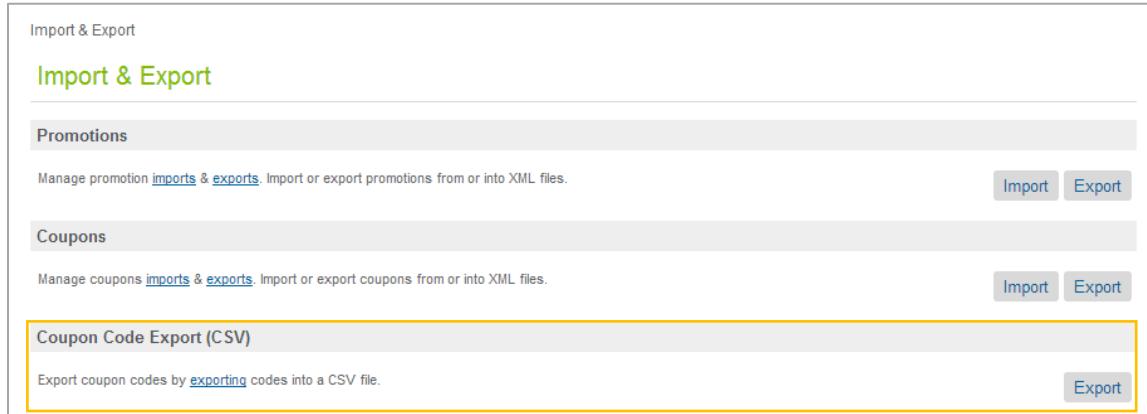
Coupon codes can be exported into a .CSV file.

In this example, the **Coupon Codes** section of the page the export status of the codes is: Not Exported.

Coupon Codes			
Code	Redemptions	Export Status	
KEYS-KB6B-PRNO-RHK4-RWYC	0	Not Exported	
KEYS-PAYG-L9EK-5XTZ-UVT5	0	Not Exported	
KEYS-HREB-LM95-SYPM-RVIL	0	Not Exported	
KEYS-PFEU-CNO4-4H25-QUZ4	0	Not Exported	
KEYS-MEXA-RAXS-WMNI-9B2S	0	Not Exported	
KEYS-KWRB-RAHN-6MY4-XN1W	0	Not Exported	
KEYS-PZVF-3IQU-5TBL-LBH3	0	Not Exported	
KEYS-Q2LF-RGQA-YP90-EKVC	0	Not Exported	
KEYS-M6XH-VDWT-R3WM-5FME	0	Not Exported	

To export the coupon codes:

1. Go to **Merchant Tools > Online Marketing > Import & Export**.
2. In the **Coupon Code Export (CSV)** section, click **Export**.



Import & Export

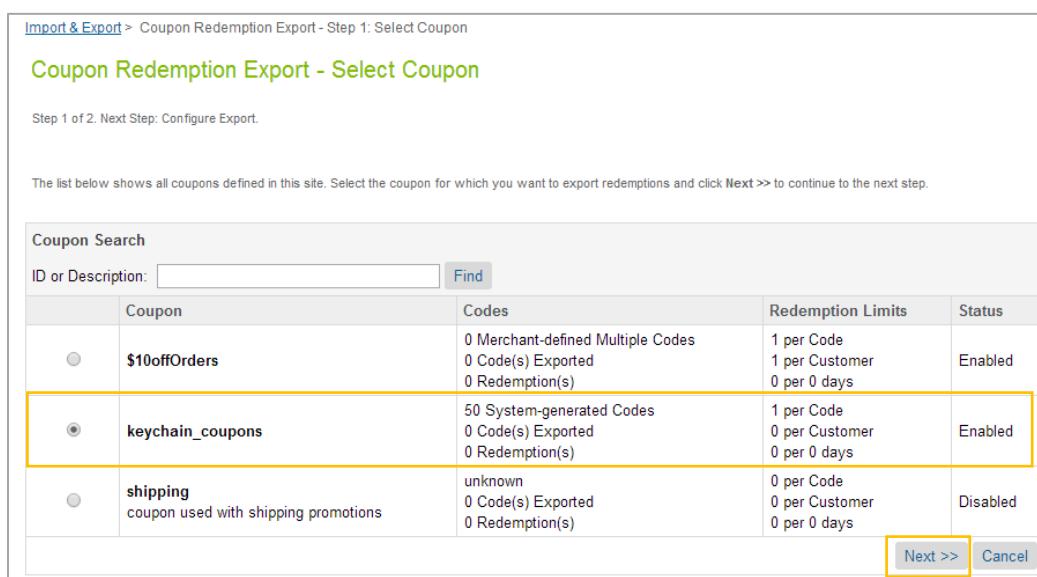
Import & Export

Promotions
Manage promotion imports & exports. Import or export promotions from or into XML files. **Import** **Export**

Coupons
Manage coupons imports & exports. Import or export coupons from or into XML files. **Import** **Export**

Coupon Code Export (CSV)
Export coupon codes by exporting codes into a CSV file. **Export**

3. Select the coupon that you want to export.
4. Click **Next >>**.



[Import & Export](#) > Coupon Redemption Export - Step 1: Select Coupon

Coupon Redemption Export - Select Coupon

Step 1 of 2. Next Step: Configure Export.

The list below shows all coupons defined in this site. Select the coupon for which you want to export redemptions and click **Next >>** to continue to the next step.

Coupon Search				
ID or Description:	Find	Codes	Redemption Limits	Status
<input type="radio"/>	\$10offOrders	0 Merchant-defined Multiple Codes 0 Code(s) Exported 0 Redemption(s)	1 per Code 1 per Customer 0 per 0 days	Enabled
<input checked="" type="radio"/>	keychain_coupons	50 System-generated Codes 0 Code(s) Exported 0 Redemption(s)	1 per Code 0 per Customer 0 per 0 days	Enabled
<input type="radio"/>	shipping coupon used with shipping promotions	unknown 0 Code(s) Exported 0 Redemption(s)	0 per Code 0 per Customer 0 per 0 days	Disabled

Next >> **Cancel**

5. Click **Export**.

Import & Export > [Coupon Redemption Export - Step 1: Select Coupon](#) > Step 2: Configure Export

Coupon Redemption Export - Step 2: Configure Export

Step 2 of 2.

Fields with a red asterisk (*) are mandatory.

Export File*:

[<< Previous](#) Export [Cancel](#)

The **Import & Export** screen displays. The export status changes from Running to Success.

Status				
Select All	Process	Start	Duration	Status
<input type="checkbox"/>	Coupon Redemption (CSV) Export <KeychainCoupons.csv>	3/13/14 1:42:14 pm	00:00:00	Success
Refresh				Delete

The export is complete and the result is a downloadable file named: {your_ID}.csv.



Practice: Create a Coupon

1. You want to place a coupon on your Facebook page to generate traffic to your site. Customers will enter the coupon at checkout. What type of coupon should you create that can be used by everyone and shared? Create the coupon.
2. Marketing wants to do an email campaign and send coupons to 700 of your customers. Since you don't want to type in 700 coupons, what type of coupons should you create? Create the coupons.

Viewing Redeemed Coupons

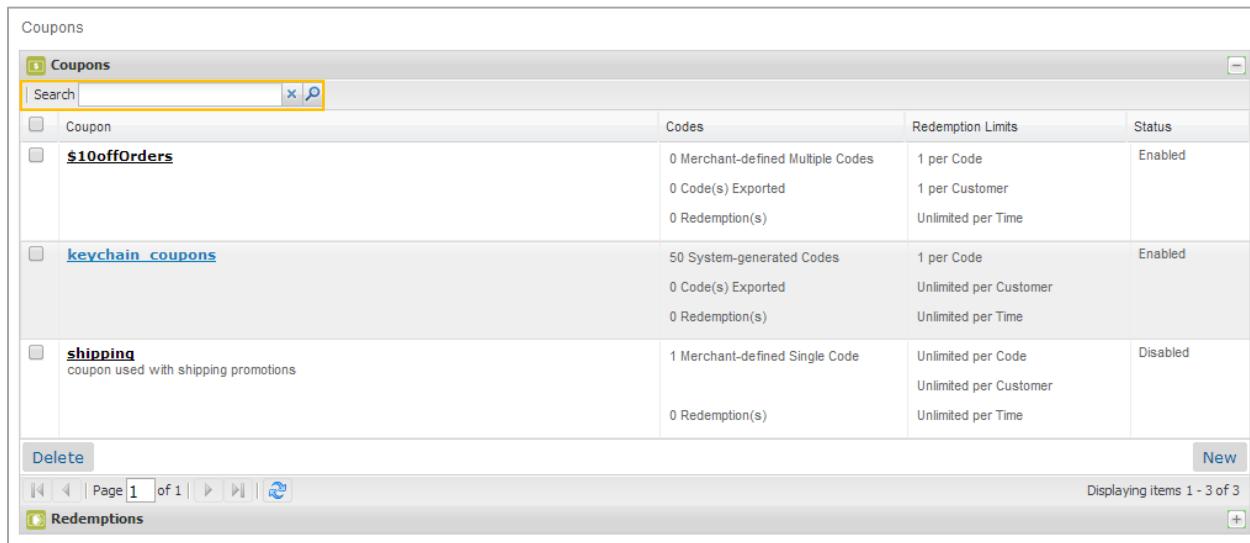
To view coupon redemptions:

1. Go to **Merchant Tools > Online Marketing > Coupons**.
2. Click the + symbol that is to the far right of **Redemptions**. This expands the redemption grid.

The grid displays the coupon, the coupon code, who and when the coupon was redeemed, and the associated order.

You can search for a specific coupon and/or export the data.

3. Use the **Search** field to find a coupon.



The screenshot shows a table of coupons. The first row is expanded, showing details for the coupon '\$10offOrders'. The table has columns for Coupon, Codes, Redemption Limits, and Status. The '\$10offOrders' row shows:

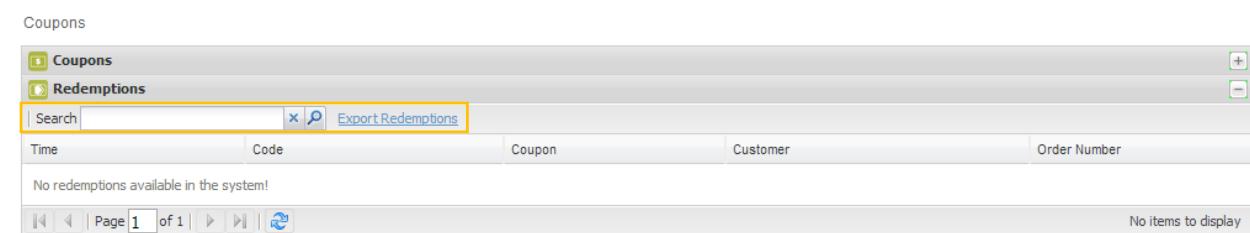
Coupon	Codes	Redemption Limits	Status
\$10offOrders	0 Merchant-defined Multiple Codes 0 Code(s) Exported 0 Redemption(s)	1 per Code 1 per Customer Unlimited per Time	Enabled
keychain_coupons	50 System-generated Codes 0 Code(s) Exported 0 Redemption(s)	1 per Code Unlimited per Customer Unlimited per Time	Enabled
shipping coupon used with shipping promotions	1 Merchant-defined Single Code 0 Redemption(s)	Unlimited per Code Unlimited per Customer Unlimited per Time	Disabled

Buttons at the bottom include 'Delete', 'New', and 'Redemptions'.

4. To search and export redemptions, expand the **Redemptions** section of the page:



5. Search for redemptions and click **Export Redemptions**.



The screenshot shows the 'Redemptions' section expanded. The 'Export Redemptions' button is highlighted. The table below shows no items available.

Time	Code	Coupon	Customer	Order Number
No redemptions available in the system!				

Attaching Coupons to Promotions

After creating a coupon you can attach the coupon to a promotion or a campaign. You can require that a customer must enter the coupon into their basket at checkout for the promotion to become effective. For details, see the *Overall Process for Creating Promotions* section.



Lesson 10.3: Using Source-Code Groups

Source-codes provide a parameter you can add to a URL. The URL can be used in email campaigns and affiliate marketing. Source-codes can be implemented with price books and specific promotions to specify redirect behavior. When used in an email campaign, source-codes can direct customers to specialized landing pages, featured product detail pages, category lists and URLs. You can provide

limited access to a promotion, content or price book without requiring the customer to enter a code at checkout.

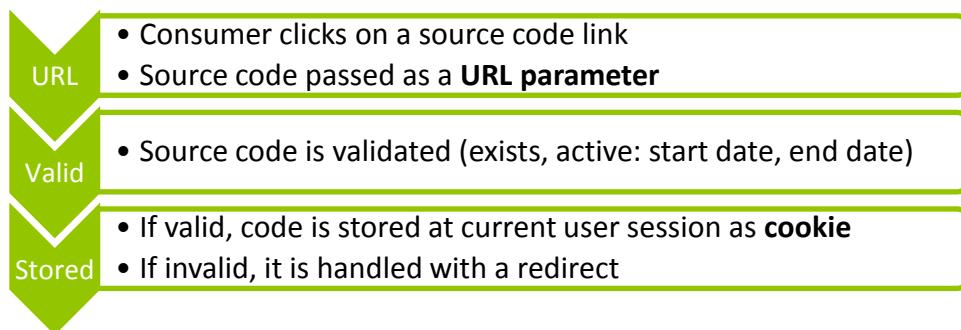
When a customer provides an individual source-code that is part of an active source-code group, they then qualify for any active promotion that is associated with that source-code group.

Setup for Links with Source-Codes

Building the URL:

1. Create the Source-code MYCODE in Demandware Business Manager.
2. Create the URL for Affiliate using a mapping rule with the source-code alias.
 - a. **Site Preferences > Source-Codes** should say "/src".
 - b. In Business Manager, **Site URLs > Mapping Rules** and
p,,,SourceCodeRedirect-Start,,src,{0}
3. When customer clicks on:
www.yourdomain.com/source/?src=MYCODE
4. The system recognizes the source-code MYCODE.
 - a. Triggers a promotion or redirect within the session.
 - b. Source-code displays in the toolkit.

Here is the process for using a source-code:



Demandware allows one active source-code per user session. If a second source-code is activated, it replaces the first source-code.

Select a price book, for example, a customer clicks on this link:

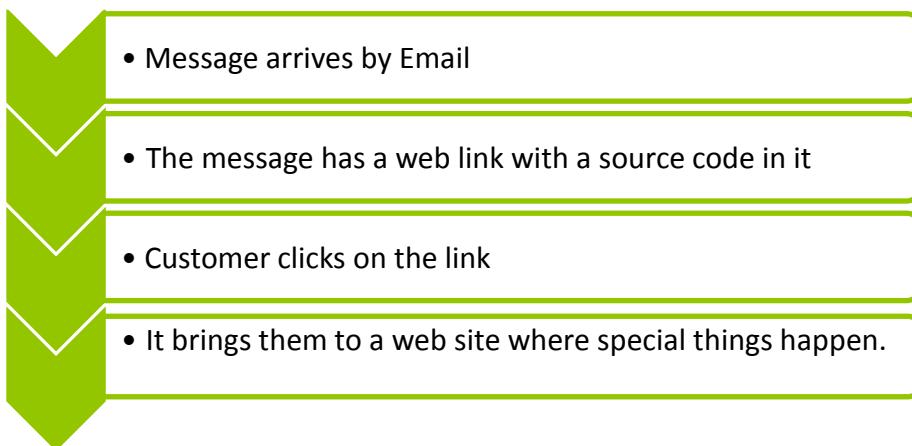
<http://www.yourstore.com/specials/?src=SpringSale>

The Demandware platform displays the Specials page using a specific price book.

<http://www.yourstore.com/Link-Page?cid=SPECIALS>

Source-codes for Email Campaigns

This is the process for using source-codes in an email campaign:



Source-codes for Affiliates

Affiliates can be given a URL that contains a source-code. The URL redirects to your site and includes the source-code value as a parameter that is passed in the Order XML.

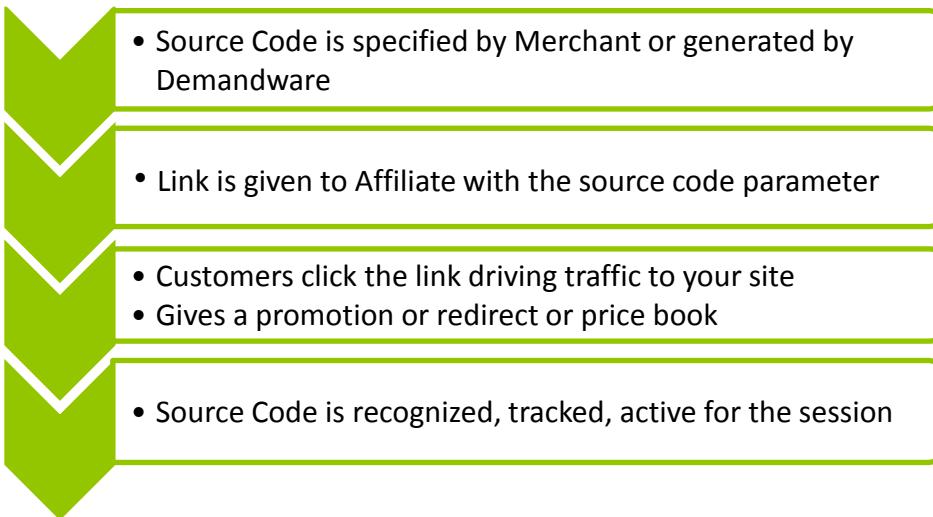
Reference information: <https://xchange.demandware.com/message/21807#21807>

<https://documentation.demandware.com/display/DC125/Managing+source+codes>

The merchant must load the URL with the source-code for the affiliate. Then, when a customer accesses your site using the source-code URL you have provided to the affiliate, that affiliate's source-code is activated.

If that same customer exits the site, then returns to it via another source-code URL, a new source-code replaces the previous one, allowing you to limit their overall fiscal exposure in both discounts offered and affiliate payments.

This is the process for using source-codes in an affiliate campaign:



Configuration of Preferences for Source-Codes

Configure source-code preferences prior to the creation of source-code groups. To configure source-code group preferences:

1. Go to **Merchant Tools > Site Preferences > Source Codes.**

Enter the URL parameter name.

2. Set cookie duration.

3. Set URL to use for redirect handling.

4. Set the active redirect default action. If the source-code is active and default is selected, it performs the action listed.

5. Set the inactive redirect default action. If the source-code is no longer active and default is selected, it performs this action.

6. Click **Apply**.

The URL displays on the **Codes** tab of the individual Source-Code Group, with the specified Source-Code Specification appended.

Note: This URL must also be specified in the Site URLs section, which is where the mapping to the actual redirect pipelet is specified.



Lesson 10.4: Creating a Source-Code Group

All of the source-codes defined in the **Codes** tab act the same way. They're all under the same ID. The ID is important because it defines the group and the behavior of the group.

To define source-code IDs:

1. Go to **Merchant Tools > Online Marketing > Source Code Groups**.
2. Click **New**.
3. Enter the source-code ID.
4. Enter the source-code description. All of the source-codes defined in the **Codes** tab act the same way. They're all under the same ID. That's why the ID is so important. It defines the group.
5. Enter the start and end date. Leave them blank for continuous use.
6. Select enabled.
7. Click **Apply**.
8. On the **Codes** tab, enter a source-code specification.
9. Click **Add**.

The source-code will be added to the group. At least two digits are required.

10. To verify that the source-code is already part of the specification:

- a. Enter a source-code specification.
- b. Enter a source-code.
- c. Click **Test Match**.

Entering a source-code and clicking [Test Match] will check all the source-code specifications.

Example: If you create a Source-Code Group with the specification: "vip[1..200]" then you can enter "vip111" and click [Test Match] to verify that vip111 is within the list of source-code specifications.

Source-Code Redirects

You can specify redirect behavior for active and inactive source-codes. The default is specified under site preferences.

Active source-codes that are current and valid can redirect the customer to the home page, a product, a category, a content page or a URL.

Source-codes become inactive when the date for the code has passed. Under those conditions the customer can be redirected. Use the source-code group **Redirects** tab to set up the redirect:

[Source-Code Groups](#) > SPRING-SALE - Redirects

General Codes Redirects Attributes Price Books

SPRING-SALE

In this view, you can specify the site behavior when a source-code is supplied as a parameter on an incoming URL.

Active:

- Default
- Home Page
- Product ...
- Category ...
- Page ...
- URL

Inactive:

- Default
- Home Page
- Product ...
- Category ...
- Page ...
- URL

Buttons: Apply | Reset

Associating Source-Codes with Price Books

You can assign a price book to a source code using the source-code group **Price Books** tab.

[Source-Code Groups](#) > SPRING-CATALOG - Price Books

General Codes Redirects Attributes Price Books

SPRING-CATALOG

!Price book with ID of 'usd-list-prices' assigned to this source-code group.

This page shows the price books assigned to this source-code group. The price lookup considers those price books and their direct parent price books in addition to all price books directly assigned to the site. The page allows you to assign price books to the source-code group by entering the ID of the price book and clicking Add.

Assign Price Book

Price Book ID: ... **Add**

Select All	ID	Name	Currency	Based On	Effective Period	Status
<input type="checkbox"/>	usd-list-prices	List Prices	US Dollar	-	-	Activated

Buttons: Delete



Practice: Change a Source-Code Group

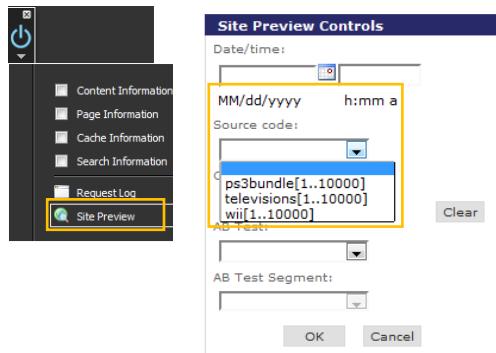
You plan to run a promotion on your new product. Marketing asks you for a link that to place in an email message to redirect customers to the new product. Create the source-code group.

Attaching Source Codes to Promotions

After creating a source code, you can attach it to a promotion or a campaign. You can require a customer to click the link for the promotion to become effective. For details, see the *Overall Process for Creating Promotions* section.

Testing a Source Code on the Storefront

You can test the source code using the storefront toolkit by selecting the source code from the list:



For additional details about source-codes see:

<https://documentation.demandware.com/display/DOC131/Source+Codes>

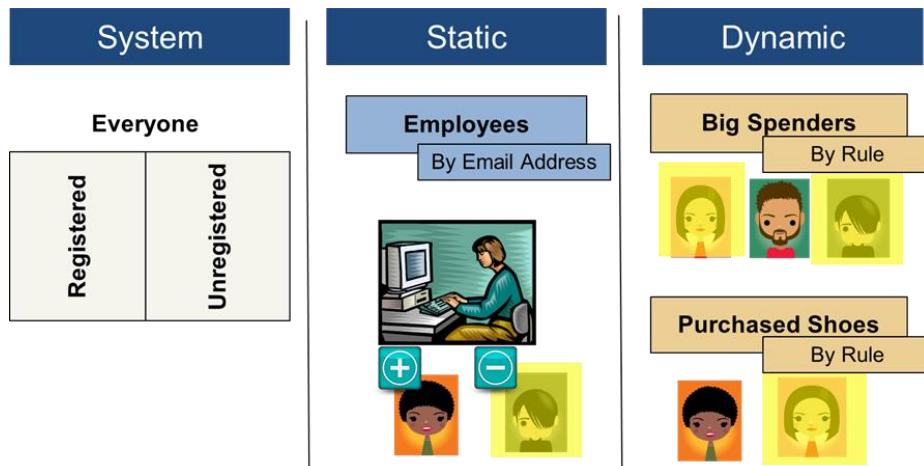


Lesson 10.5: Customer Groups

You can create customer groups to target marketing campaigns and promotional offers.

Examples:

- Registered customers get 15% off
- Employees get 50% off
- Big spenders get free shipping



There are three types of customer groups:

- **System** – provided by default; you cannot change them. It includes Everyone, Registered, Unregistered.
- **Static** – import or create manually. Manage customer assignments by adding or removing people from the group.
- **Dynamic** – configure rules that determine membership. Customers are dynamically assigned and removed based on the rule.

Customer Group Membership

Individuals can be in multiple customer groups at the same time.

Example: A customer can be part of: everyone, registered customers, employees, big spenders and the group of people who bought shoes.

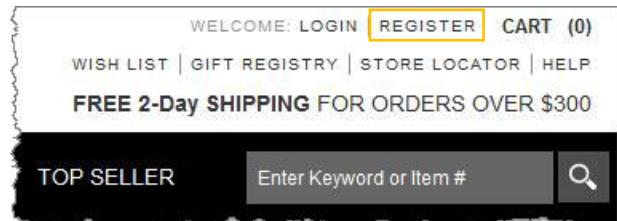
The system determines Customer Group Membership affected when the user:

- Initiates a session (they automatically become part of Everyone system group)
- Registers (they become part of Registered system group)
- Does not register (they become part of Unregistered system group)
- Meets some dynamic group criteria, such as 'male' (part of male dynamic group)
- Logs in and logs out



Practice: Use Registration to Add a Customer to the Customer List

1. Click **REGISTER** (at the top of every page).



2. Go to **Merchant Tools > Customers > Customers**.

3. Click **Find**.

Once registered, your name is in the customer list with the details provided during registration.



Lesson 10.5: Using Static Customer Groups

Customers represent repeat business and constructive product feedback; and can increase future sales through loyalty and word-of-mouth advertising.

Using Business Manager, you can:

- Manage basic customer data such as name, ID, login and password
- Search the customer database
- Add, edit and delete customers and import customer profiles
- Create and manage new customer attributes
- Import/export customer data from/to external databases
- Define customer groups to target specific customers for marketing campaigns

To search for customers by name or customer number:

1. Go to **Merchant Tools > Customers > Customers** and click **Find**.

To add or delete customers:

1. Click **New** to add new customers.
2. Click **Delete** to remove customers

To import customers:

1. Go to **Merchant Tools > Customers > Import & Export**. Under **Customers**, click **Import**.

Create a Static Customer Group

1. Go to **Merchant Tools > Customers > Customer Groups**.
2. Click **New**.

3. Enter a unique ID for the customer group.
4. Select customer type **Static**.
5. Click **Apply**.
6. Select the **Members** tab.
7. Click **Add More Members**.

[Manage Customer Groups > Employees - Members](#)

General Attributes **Members**

Members

This page shows all members of the selected customer group.

It allows you to search for customers by ID and name. Select Advanced to use more search options. Use wildcards (*) to suffix your search terms, e.g. Fo*.

Click Add More Members to assign customers to the customer group.

Simple Customer Search		Simple	Advanced
Name or No.:	<input type="text"/>	Find	
Currently, this customer group has no members.			
Unassign	Add More Members		

8. Click **Find**.
9. Check the customers to assign to the static group.

[Manage Customer Groups > Employees - Members > Assign Customers](#)

Select Customers

Select the customers you want to assign to the customer group.

This page allows you to search for customers by ID and name. Select Advanced to use more search options.

Use wildcards (*) to suffix your search terms, e.g. Fo*.

Simple Customer Search							Simple	Advanced
Name or No.:	<input type="text"/>	Find						
Select All	Customer Number	Login	Last Name	First Name	Email	Status		
<input type="checkbox"/>	S00000003	dude@demandware.com	Lebowski	Jeff	dude@demandware.com	Active		
<input type="checkbox"/>	S00000001	jg@demandware.com	Gate	James	jg@demandware.com	Active		
<input type="checkbox"/>	S00000002	samadams@demandware.com	Adams	Samuel	samadams@demandware.com	Active		
<input type="checkbox"/>	S00000005	patricia@demandware.com	Miller	Patricia	patricia@demandware.com	Active		
<input type="checkbox"/>	S00000004	jules@demandware.com	Winnfield	Jules	jules@demandware.com	Active		

Assign **Cancel**

10. Click **Assign**.



Lesson 10.6: Using Dynamic Customer Groups

You can create dynamic customer groups for both registered and anonymous customers based on customer's session data, such as:

- Customer's referrer URL, referrer keywords sent with the incoming HTTP request
- Locale of the customer's request
- Authentication state of the customers' session (logged in or not)
- Whether or not the customer is registered
- Customer's that visit the store with an active source-code
- Session custom attributes that you define

This data comes from the **Active Data** tab for a customer on a staging/demo instance. Attributes for active data include:



The data that you capture can be specific to your implementation. Your site can be tagged to capture active data for your products and customers.

Identifying what data is for registered users vs. visitors is dependent on the data you collect.

Example: The customer arrives at your storefront from a pay-per-click link from Google. The customer may be unregistered. However, the customer group rule looks for a session variable based on the referrer host and you can display targeted content and promotions to these customers whether they are registered or unregistered based strictly on session data.

Rules for dynamic customer groups:

- Membership is re-evaluated when a known customer returns to the storefront with a new session, during login and logout, and every 1 minute.
- Registered customers DO NOT have to be logged in to be members of a dynamic group; it is sufficient that the customer be remembered by a cookie.
- If any profile attribute is used in the dynamic group rule, all unregistered (anonymous) customers will be excluded from the group, i.e. such conditions will always evaluate to 'false' for unregistered customers
- The following request and session attributes are available and work for both registered and unregistered customers: referrer URL, host, keywords, active source code group, locale, registered, authenticated (logged in), custom session attributes.
- These rules apply to unregistered customers.
- The number of customers that belong to a dynamic customer group is not displayed or tracked. This is available only for static customer groups.

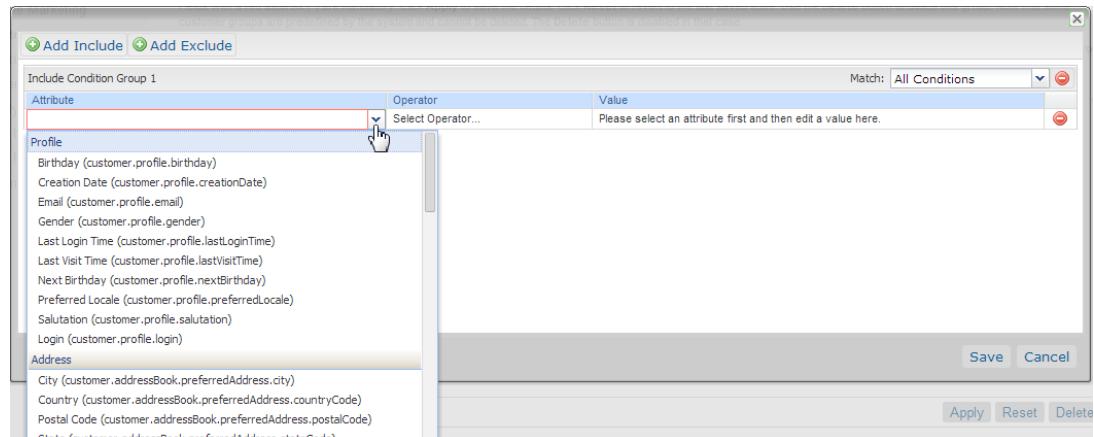
Examples:

- Purchased more than 3 times in the last 6 months
- Purchased more than X dollars in their lifetime
- Purchased something from flash sale

For more information, see the *Using dynamic customer groups for active merchandising* section in the documentation.

Creating a Dynamic Customer Group

1. Go to **Merchant Tools > Customers > Customer Groups**.
2. Click **New**.
3. Enter a unique ID.
4. Select the type, **Dynamic**.
5. Click **Apply**.
6. Select **Edit** to create a membership rule.
7. Click **Select Attribute...** and select an attribute.



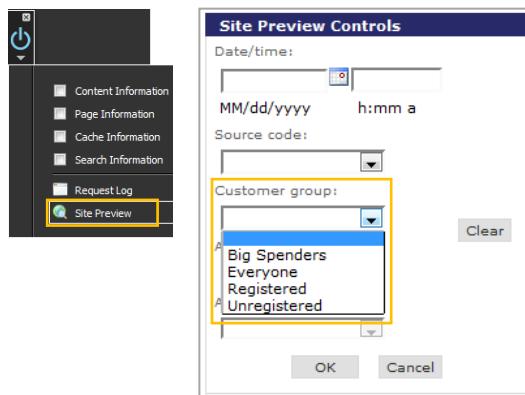
8. Select an Operator such as, "is equal."
9. Enter a value.
10. Optional: Click **Add Include** or **Add Exclude** to add more conditions.
11. Optional: For **Match**, select **All Conditions** or **Any Condition** to define the handling of multiple conditions.
12. Click **Save**.
13. Click **Apply**.

Attaching Customer Groups to Promotions

After creating a customer group, you can attach it to a promotion or a campaign. You can require that a customer must be a member of the customer group for the promotion to become effective. For details, see the *Overall Process for Creating Promotions* section.

Testing Customer Groups on the Storefront

After creating customer groups, you can test them using the storefront toolkit by selecting the source code from the list:





Practice: Create Customer Groups (Static and Dynamic)

1. You want to give special pricing to the celebrities that work with your marketing team. Create a Static customer group called “celebrities” and add three existing customers to your new static group.
2. Create a Dynamic customer group called “BigSpenders.” Use a rule to specify that the group will contain all customers who have spent more than \$500 in the past 30 days.



Best Practices

- For system generated coupons, set the preference, “Include vowels and Y:” to “No”
- If necessary, it may save time to import customers into a static customer group. This import could be scheduled.

Module 11: Campaigns

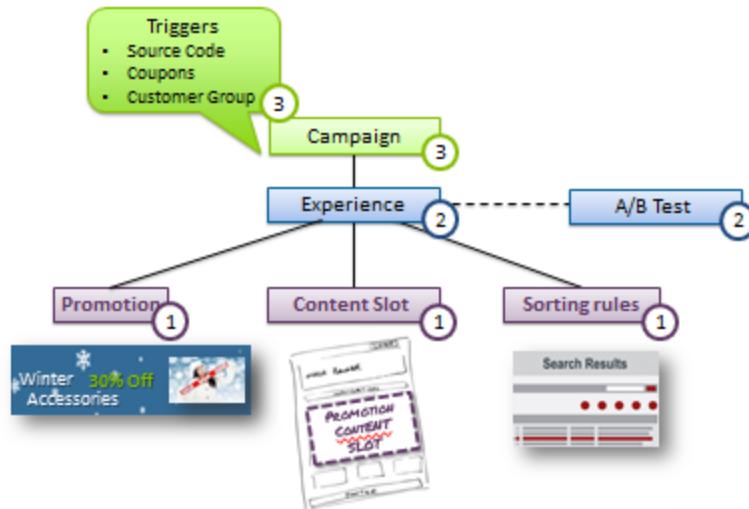
Objectives

Upon completion of this module, you will be able to:

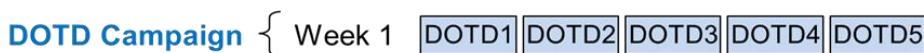
- Create Campaigns
- Manage promotions within a campaign
- Set up campaign experiences

Overview

A campaign is a container for one or more promotions, content slots and sorting rules that makes it easier to group and manage them.



Examples: Summer sales, holiday sales, brand sales, free shipping, buy-one-get-one-free, deal-of-the-day or a campaign that lasts a month with different promotions each week.



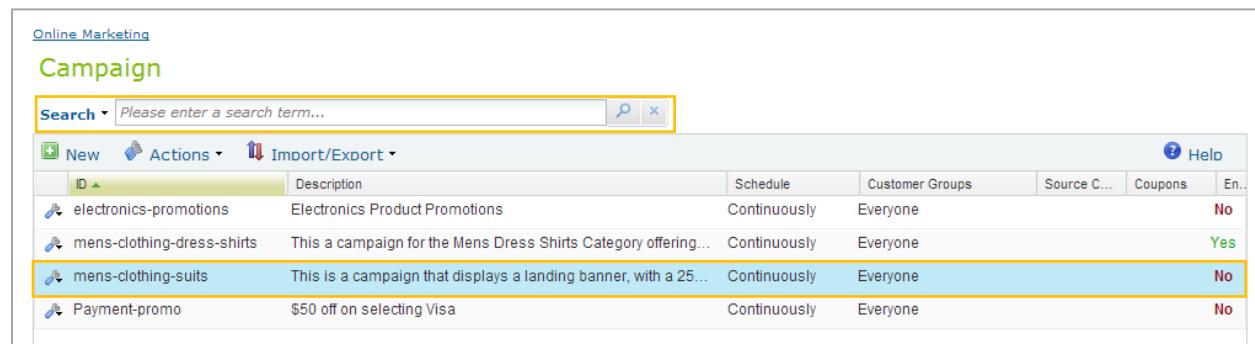
Each campaign includes details that are inherited by the promotions, slot configurations and sorting rules defined within the campaign. You can target promotions to everyone or to specific customer

groups and are active for a specific timeframe. There are three promotion types: order, product and shipping. Campaigns and promotions must be enabled and are not shared across sites.

Promotions are grouped under Campaigns:



In Business Manager, campaigns display as a list. You can search for a campaign. Double-click a campaign to open and edit it.



ID	Description	Schedule	Customer Groups	Source C...	Coupons	En...
electronics-promotions	Electronics Product Promotions	Continuously	Everyone		No	
mens-clothing-dress-shirts	This a campaign for the Mens Dress Shirts Category offering...	Continuously	Everyone		Yes	
mens-clothing-suits	This is a campaign that displays a landing banner, with a 25...	Continuously	Everyone		No	
Payment-promo	\$50 off on selecting Visa	Continuously	Everyone		No	

Note: Click the wrench icon on the left to Edit, Delete or Enable/Disable the campaign.



Lesson 11.1: Creating a Campaign

1. Go to **Merchant Tools > Online Marketing > Campaigns**.
2. Click **New**.

Online Marketing > Campaign

New Campaign - 3/13/14 3:27:34 pm

Creation Date: 03/13/2014 Last Modified: 03/13/2014

Locale: Default Help

General

ID:	decembercampaign
Enabled:	Yes
Description:	December campaign

Scheduling & Qualifiers

Start Date:	12/01/2014 12:00 AM	No Start Date
End Date:	12/31/2014 12:00 AM	No End Date
Customer Groups:	(1) Everyone	Edit
Source Codes:	(0)	Edit
Coupons:	(0)	Edit

3. Enter an **ID**.
4. Set **Enabled** to **Yes**.
5. Enter a **Description**.
6. Enter dates for the campaign (required, unless you check **No Start Date** and **No End Date** to run the campaign continuously).
7. Select a qualifier by clicking **Edit** next to **Customer Groups**, **Source Codes**, or **Coupons**:
8. Click **Edit** to enter a qualifier.

To add an experience to the campaign, click **Add Experience**. Note: Experiences are covered in the following lesson.

Campaign Attributes

Attribute	Description
ID	Determine a naming convention to facilitate searching, and provides a standard.
Description	Describe your campaign as it relates to an event, a time period, or the promotions it contains.
Enabled	Select Yes to enable the campaign. If it is set to No, then none of the promotions will run.
Schedule	The promotions inherit the schedule from the campaign. Note: The schedule of the promotions can differ from those of the campaign, but each promotion schedule must be within the scheduled dates of the campaign.

Qualifier	Set the qualifier, customer groups, source-codes or coupons at the campaign level. You can assign or override them at the promotion level. Click Edit to view a list of available promotions, source-codes or coupons.
-----------	---



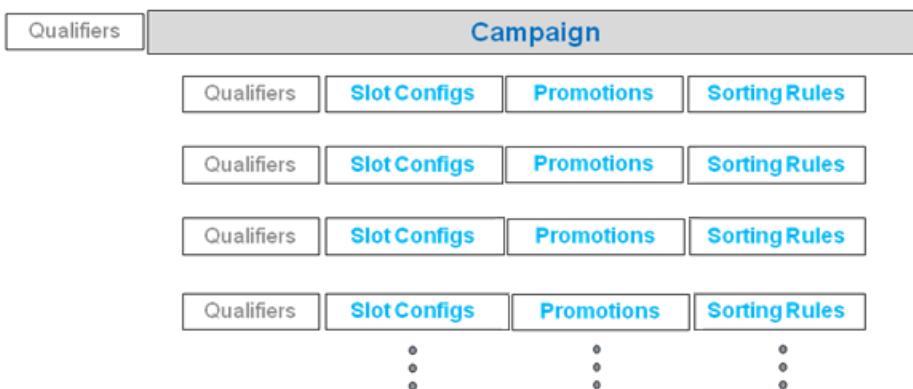
Practice: Create a Campaign

1. Create a Holiday Campaign with your name as part of the ID.
2. Your instructor will assign a month.
3. Be sure to set the customer group to Everyone.
4. We will do experiences next.



Lesson 11.2: Using Experiences

Campaigns can contain multiple experiences for different reasons. Experiences are formed by the combination of one or more slot configurations, promotions and sorting rules.



Since a campaign contains experiences, the schedule of the experiences must fall within the campaign. If a campaign runs for a month, each promotion within that campaign must start and end that month.

Examples:

High-end customers get,

- Content Slot: Banner says “Spend \$900+ and get 50% off”
- Promotion: 50% off \$900+
- Sorting Rule: Sort by High to Low

People in Customer Group “Birthday” get,

- Content Slot: Banner “Happy Birthday, Free Shipping on Jewelry”

- Promotion: Free shipping on jewelry
- Sorting Rule: Jewelry sorts to the top



Lesson 11.3: Creating Experiences

- Go to **Merchant Tools > Online Marketing > Campaign**.
- Scroll to the bottom.
- Click **Add Experience** to attach slot configurations, promotions and sorting rules to the campaign.

Add a Promotion

- In the Add Experience menu, select **Add Promotion**.

The screenshot shows the 'Experiences' screen. At the top, there's a navigation bar with tabs like 'Context' and 'Schedule'. Below the navigation is a section titled 'Promotions (0 experiences)' with a green plus sign button. Further down is a section titled 'Sorting Rules (0 experiences)' with a green plus sign button. To the left of these sections is a dropdown menu labeled 'Add Experience' with four options: 'Add Slot Configuration', 'Add Promotion' (which is highlighted with a yellow box), 'Add Sorting Rule', and 'Add Rule'.

The system displays a list of promotions.

- Select one or more promotions.

The screenshot shows the 'Assign Promotions' dialog box. It has a search bar at the top with placeholder text 'Please enter a search term...'. Below the search bar is a table with columns: 'ID', 'Name', 'Type', and 'Enabled'. There are 14 rows of promotion data. One row, '25off-suits', is highlighted with a yellow border and has a checked checkbox in its first column. At the bottom of the dialog are buttons for 'Cancel' and 'Apply'.

ID	Name	Type	Enabled
10%offordersover150	Get 10% Off Orders when Spending \$150	Order	No
10off-InStyle	10% Summer Flats	Product	No
15off-gps	GPS 15% Off	Product	No
15off-nano	15% Off iPod Nano	Product	No
15off-samsunglcd	15% Off Samsung LCD Televisions	Product	No
20ff-dress-shirts	20% off dress shirts category	Product	No
20off-gamewconsole	20% Off Wii Game	Product	No
20off-tvs	20% Off select TVs	Product	No
<input checked="" type="checkbox"/> 25off-suits	25% off Men's Suits Category	Product	Yes
buy3dsgames-75	3 Nintendo DS Games For \$75	Product	No
freeship-over150	Free Ground shipping on orders over \$150	Shipping	No
freeshipping-tvs	Free Shipping on TVs	Product	No
Payment-Promo	50-off-using-visa	Order	No
ps3bundle-50off	Playstation 3 Bundle \$50 off	Product	No

Notice that the selected promotion is a product promotion that is already enabled. Using a good naming convention makes it easy to select the correct promotion.

3. Click **Apply**.
4. Optionally you can:
 - a. Review and modify (as appropriate): the schedule, customer groups, source-codes, and coupons.
 - b. Rank the promotion (if applicable).
 - c. Click **Apply**.

Add Experiences

The experience has: ID, Schedule, Customer Groups, Source Codes Coupons, Required Qualifiers, Rank, Exclusivity, and Enabled”

Module 12: Promotions

Objectives

Upon completion of this module, you will be able to:

- Identify the types of promotions
- Search and modify a promotion
- Create global exclusions
- Create promotion rules for types of promotions
- Create visualizations

Overview

Business Manager enables you to create and manage product, order, and shipping promotions.

You can have multiple promotions for each campaign. The campaign has a time period and qualifier, which the promotion inherits. However, you can specify a schedule for the promotion as long as it falls within the campaign timeframe.



Discussion

- Which promotions are you doing today?
- Which promotion types will you use in Demandware?

Search for an Existing Promotion

1. Go to: **Merchant Tools > Business Manager > Online Marketing > Promotions**.
2. Enter the name or promotion ID in the search field.

Promotion Actions

Select a promotion. Click **Actions** to display the promotion actions:

Online Marketing

Promotions

Search ▾ Please enter a search term...

ID		Type	Schedule (Active / Upcom...)	Schedule Assigned to	Schedule...	Ena...	Exclus...
10%off	Orders when Specified	Order	Continuously	Test Segment B	AB Test	No	NO
100ff	Flats	Product	None			No	CLASS
150ff	Nano	Product	None			No	CLASS
150ff	Samsung LCD Televis...	Product	None			No	CLASS
150ff	Dress Shirts Category	Product	Continuously	mens-clothing-dress-shirts	Campaign	No	CLASS
200ff	Wii Game	Product	None			No	CLASS
200ff-tvs	20% Off select TVs	Product	None			No	CLASS
250ff-suits	25% off Men's Suits Category	Product	None			Yes	CLASS

Actions ▾ Import/Export ▾ Help

- Select Visible
- Unselect Visible
- Delete Selected Promotions
- Enable Selected Promotions
- Disable Selected Promotions
- Globally Excluded Products
- Globally Excluded Product Options

Modify a promotion

You can edit, delete and enable a promotion by clicking on its wrench icon 

The promotion's actions display:

 200ff-gamewconsole	20% Off Wii Game	Product	None	No	CLASS
 200ff-tvs	20% Off select TVs	Product	None	No	CLASS
 250ff-suits	25% off Men's Suits Category	Product	None	Yes	CLASS
 Edit Promotion	Nintendo DS Games For \$75	Product	None	No	CLASS
 Delete Promotion	Free Ground shipping on order...	Shipping	Continuously	Test Segment A	AB Test
 Disable Promotion	Free Shipping on TVs	Product	None	No	CLASS
 Disable Globally Excluded Products	Off Using Visa	Order	None	No	NO
	Playstation 3 Bundle \$50 off	Product	None	No	CLASS



Lesson 12.1: Creating a Promotion

1. Go to **Merchant Tools > Online Marketing > Promotions**.
2. Click **New**.

Online Marketing > Promotions

General

You can manage general and custom promotion attributes in this section. The Status field indicates if the promotion is active or inactive (to be Active a promotion must be both Scheduled and Enabled). Name is generally used as a short description of the promotion like in the Cart, Callout Message generally used as a slightly more detailed message for instance on a product detail page. Promotion Details generally is used for all promotion details, legal messaging and fine print, and then linked from the Callout Message or Name. To schedule or modify promotion qualifiers (Customer Groups, Source Codes or Coupons) a promotion must be assigned to Campaign or AB Tests. This must be done from within the specific Campaign or AB Tests you want to include the promotion in. You can see where this promotion is scheduled in the Schedule/Qualifiers/Compatibility Section. Click the Apply button at the bottom of each panel (General or Promotion Rule) to save the data for that section.

Select language: Default

ID: [*]	Spend200get10off	?
Name:	10% off everything when you spend \$200 or more	?
Enabled:	Yes	?
Searchable:	No	?

Callout Message:

Promotion Details:

Image:

Compatibility

Exclusivity:^{*} - None - ?

3. Enter a unique **ID** (the ID is required).
4. Enter a **Name** (the name should clearly describe the promotion).
5. Set **Enabled** to **Yes**.
6. Set **Searchable** to **Yes** or **No**.
7. Enter a callout message and/or promotion details in the description fields.
8. Select **Exclusivity** from: **No, Class, or Global**.
9. Click **Apply**.

Exclusivity Choices

To prevent stacking of promotions by customers, you must specify the exclusivity for each promotion. This will allow promotions to be combined or it will prevent promotions from being combined.

The exclusivity types are:

- **No:** Can be combined with other promotions. This is the least restrictive.
- **Class:** Cannot be combined with promotion of same class
- **Order:** exclusivity is per order
- **Shipping:** exclusivity is per shipment
- **Product:** exclusivity with multiple promotions allows one promotion per SKU
- **Global:** Cannot be combined with any other promotion. This is the most restrictive. Global means this is the only discount the customer receives on the order.

For details, see the *Promotion compatibility* section in the documentation.



Lesson 12.2: Promotion Rules

When you click **Apply**, promotion rule section displays below the **General** section.

Promotion Rule

Select the Promotion Class you want (Product, Order, Shipping), then from the promotion types available for that Promotion Class.
* For Product promotions, create discounts and specify Qualifying Products (the products which trigger the Discount) and Discounted Products (the products to which the discount is applied).
* For Order promotions, create discounts and optionally specify Excluded Products and Qualifying Products. Excluded products do not contribute to the merchandise condition and are not discounted. If Qualifying Products is left empty, all non-excluded products in the order contribute towards the merchandise condition. Otherwise, the specified amount of qualifying products are required to trigger the discount.
* For Shipping promotions, create discounts and specify Qualifying Products and Shipping Methods. For promotions with number of qualifying products, qualifying products are mandatory. For promotions with amount of qualifying products, qualifying products are optional. If left empty, all products in the shipment contribute towards the merchandise condition. One of the specified Shipping Methods must be selected in the storefront to trigger the discount.

Multiple Discount tiers are available for some promotion types. Click Add to create multiple tiers or delete an existing tier clicking the remove icon. Maximum Applications limits the number of times the promotion can be applied per order.

Example: 10 percent off

Promotion Class:

Discount: Percent Off

Discounted Products: Press 'Edit' to define product group.

Maximum Applications: per order

Schedule/Qualifiers/Compatibility

Order Promotions

Order promotions are based on the total cost of the merchandise in the *entire order* in the customer's basket.

Order Promotions	Example
Percent Off	Buy \$100 or more and receive 20% off
Amount Off	Buy 2 or more and receive \$25 off
Bonus Product(s)	Buy \$100 or more and get a free cosmetic gift bag
Choice of Bonus Product(s)	Buy 2 or more and choose your bonus

To create an order promotion rule:

1. In the Promotion Rule section, for **Promotion Class**, select **Order**.
2. Select **With amount of qualifying products** as the type of promotion class.

Promotion Rule

Select the Promotion Class you want (Product, Order, Shipping), then from the promotion types available for that Promotion Class.
 * For Product promotions, create discounts and specify Qualifying Products (the products which trigger the Discount) and Discounted Products (the products to which the discount is applied).
 * For Order promotions, create discounts and optionally specify Excluded Products and Qualifying Products. Excluded products do not contribute to the merchandise condition and are not discounted. If Qualifying Products is left empty, all non-excluded products in the order contribute towards the merchandise condition. Otherwise, the specified amount of qualifying products are required to trigger the discount.
 * For Shipping promotions, create discounts and specify Qualifying Products and Shipping Methods. For promotions with number of qualifying products, qualifying products are mandatory. For promotions with amount of qualifying products, qualifying products are optional. If left empty, all products in the shipment contribute towards the merchandise condition. One of the specified Shipping Methods must be selected in the storefront to trigger the discount.

Multiple Discount tiers are available for some promotion types. Click Add to create multiple tiers or delete an existing tier clicking the remove icon. Maximum Applications limits the number of times the promotion can be applied per order.

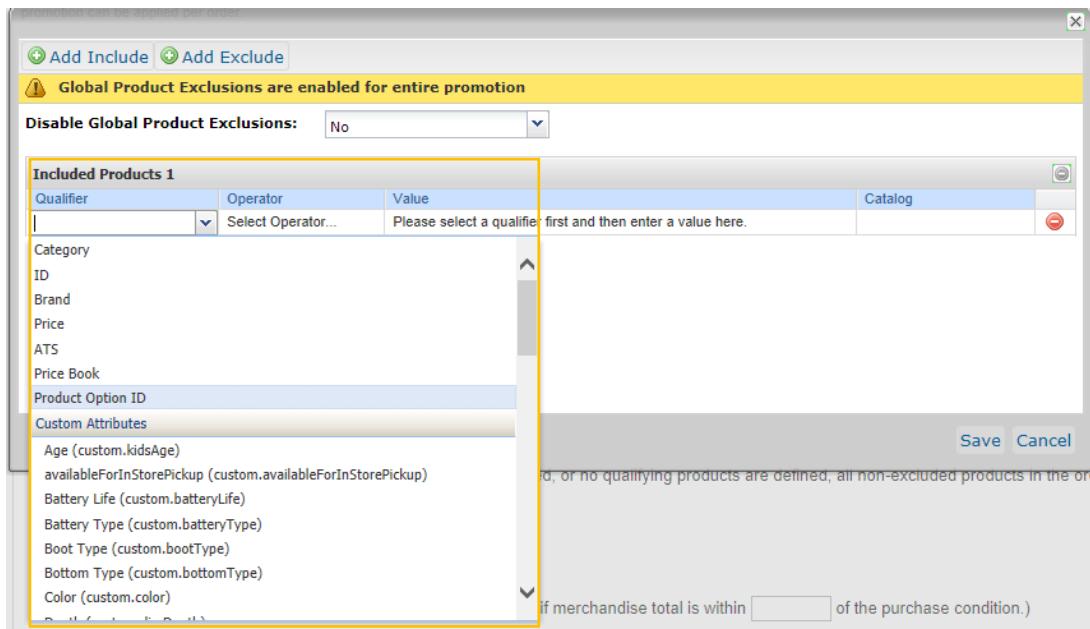
Example: Buy 100 or more and get 10 percent on order merchandise total

Promotion Class:	Order	<input checked="" type="checkbox"/> With amount of qualifying products
Discount:	Buy <input type="text"/> or more and get <input type="text"/> Percent Off	<input type="button" value="Add"/>
Excluded Products: Press 'Edit' to define product group. Global product exclusions are enabled.		
<input type="button" value="Edit"/>		
Qualifying Products: Press 'Edit' to define product group. Global product exclusions are enabled.		
<input type="button" value="Edit"/>		
Discounted Products: <input checked="" type="checkbox"/> Same as qualifying products. If unchecked, or no qualifying products are defined, all non-excluded products in the order are discounted.		
Payment Methods: No payment methods selected yet.		
<input type="button" value="Edit"/>		
Alert: <input type="checkbox"/> Return as approaching promotion. (Only if merchandise total is within <input type="text"/> of the purchase condition.)		
<input type="button" value="Apply"/>		

3. Enter the **Discount**.

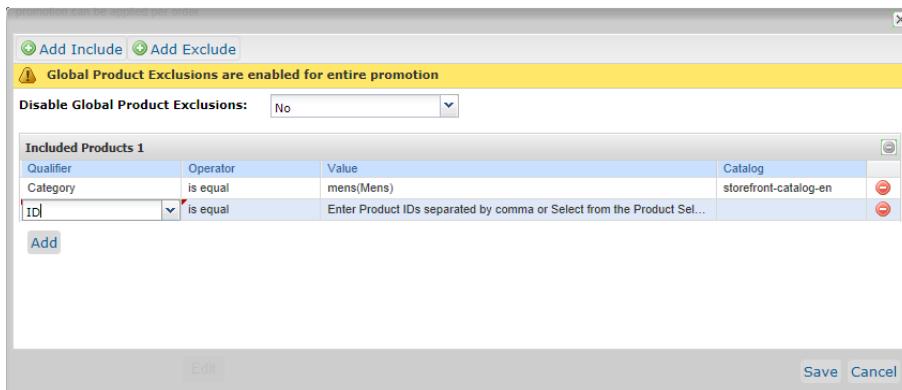
4. Under **Excluded Products or Qualifying Products**, click **Edit** to include or exclude particular products from the promotion.

Many qualifiers are available to determine inclusions/exclusions. The custom attributes depend on your site.

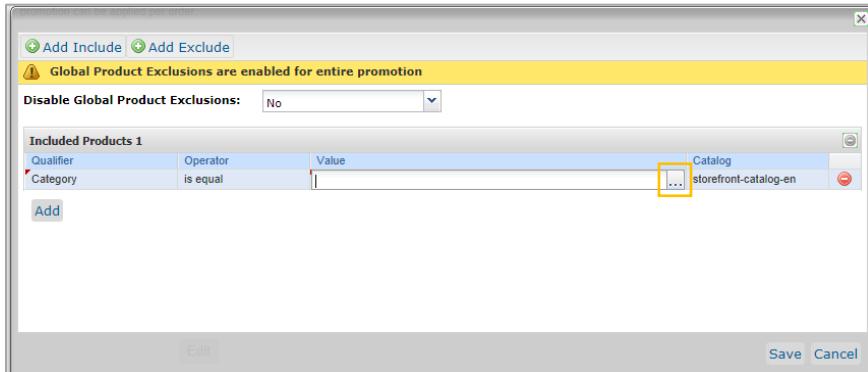


A single product or multiple products can be selected by using **ID** as the qualifier.

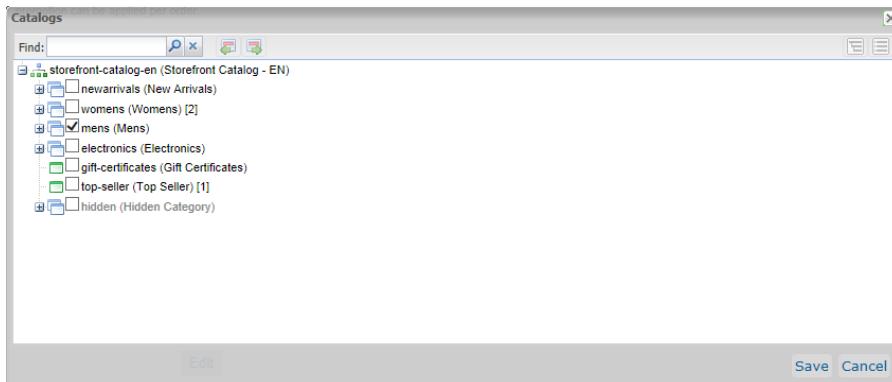
You select a qualifier, operator, and a value:



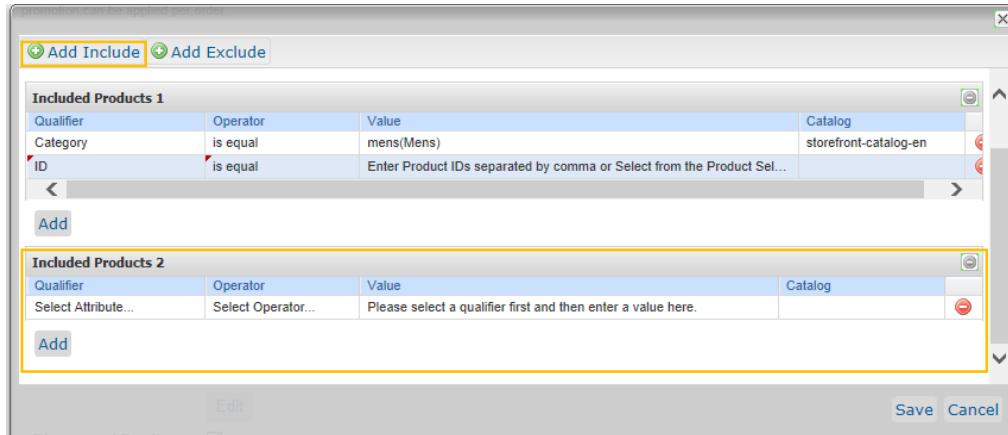
If you select **Category** as the qualifier, you can click the ellipsis under **Value** to select from site-specific categories.



You can select multiple categories and sub-categories.



When you are including or excluding products, you can click **Add Include** to specify additional qualifiers:



Examples:

- “Category equals mens” could be included in the promotion.
- “Category equals sale” could be excluded from the promotion.

Note: You can have multiple “Includes” or “Excludes.”

5. Enter **Discounted Products** (if applicable).
6. Click **Edit** to enter the Payment Methods.

Example: Buy 100 or more and get 10 percent on order merchandise total

Promotion Class:	Order <input checked="" type="checkbox"/> With amount of qualifying products <input checked="" type="checkbox"/>
Discount:	Buy <input type="text"/> or more and get <input type="text"/> Percent Off <input checked="" type="checkbox"/>
Add	
Excluded Products:	Press 'Edit' to define product group. Global product exclusions are enabled.
Edit	
Qualifying Products:	Products in category 'mens(Mens)' or subcategories Global product exclusions are enabled.
Edit	
Discounted Products:	<input checked="" type="checkbox"/> Same as qualifying products. If unchecked, or no qualifying products are defined, all non-excluded products in the order are discounted.
Payment Methods:	No payment methods selected yet.
Edit	
Alert: <input type="checkbox"/> Return as approaching promotion. (Only if merchandise total is within <input type="text"/> of the purchase condition.)	
Apply	

7. Select the payment methods and click **Assign**, then **Save**.

Available Payment Methods

ID	Description
<input type="checkbox"/>	BANK_TRANSFER
<input type="checkbox"/>	BLN
<input type="checkbox"/>	CREDIT_CARD
<input type="checkbox"/>	CREDIT_CARD.Amex
<input type="checkbox"/>	CREDIT_CARD.DinersClub
<input type="checkbox"/>	CREDIT_CARD.Discover
<input type="checkbox"/>	CREDIT_CARD.Master
<input type="checkbox"/>	CREDIT_CARD.MasterCard
<input type="checkbox"/>	CREDIT_CARD.Visa

Page 1 of 2 |

ASSIGN **REMOVE**

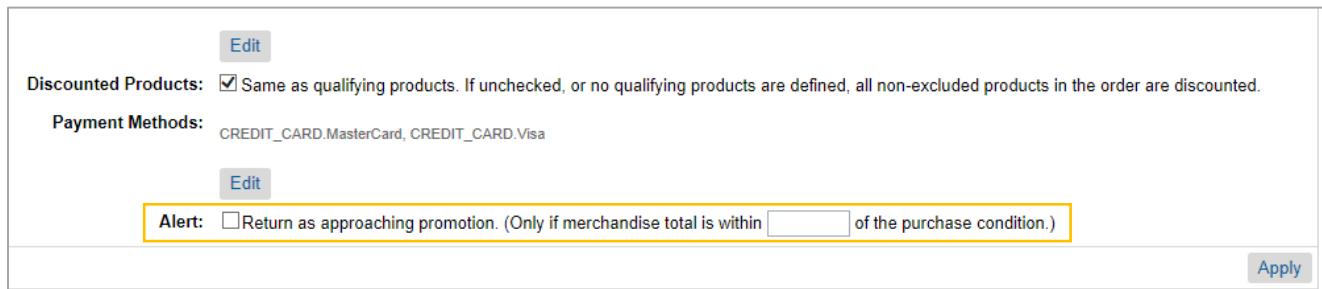
Displaying items 1 - 10 of 12

Assigned Payment Methods

ID	Description
<input type="checkbox"/>	CREDIT_CARD.MasterCard
<input type="checkbox"/>	CREDIT_CARD.Visa

Save **Cancel**

8. Check **Alert** (if applicable) and enter the monetary amount that should trigger the alert.



The screenshot shows a configuration page for an order promotion. It includes sections for 'Discounted Products' (with an 'Edit' button), 'Payment Methods' (listing CREDIT_CARD.MasterCard and CREDIT_CARD.Visa), and an 'Alert' section. The 'Alert' section contains a checkbox labeled 'Return as approaching promotion. (Only if merchandise total is within [] of the purchase condition.)' and an 'Apply' button at the bottom right.

If you have a promotion that is tied to a spending amount, then you can provide messaging at checkout. The message informs the customer how close they are to the obtaining the promotion.

9. Click **Apply**.



Practice: Create an Order Promotion

1. You want to offer 15% off every order, however, you want to maintain the current price of all women's jewelry. Create an order promotion that does both.
2. Make sure the type of the promotion is **Order**.
3. Put your name in the ID.
4. Set Exclusivity to **No**.

Choice of Bonus Product

The Demandware platform enables you to provide your customers with a *choice-of-bonus-product* discount. With this discount type, you can define many promotions.

Examples:

- Get a free shirt in your size when placing any order
- Spend at least \$1000 on living room furniture, and get your choice of 3 different types of televisions
- Buy \$50 worth of merchandise, and get a hat in your size
- Buy a men's jacket and optionally buy a bonus tie for \$1.99
- Buy \$100 of outerwear and choose a bonus gift for \$3.99 from a set of 5 accessories

Note: When the customer adds a product to the cart, the bonus product is automatically added. Bonus products must be either a variation product or standard product.

Payment Methods

You can create order promotions that are based on the customer's payment method or credit card. Your payment methods are determined during your implementation.

Example: Use PayPal and get \$10 off your order. Use VISA and get 10% off your order, or use a named "private label" credit card and save 5% off your order.

Note: Your administrator can add methods using **Merchant Tools > Ordering > Payment Methods**.

Tiered Promotions

You create a tiered promotion by defining multiple promotion rules within the same promotion. Use tiered promotions (instead of multiple individual promotions) to provide increasing incentives, while limiting the customer to one discount. In a tiered promotion, each promotion rule requires a unique threshold value.

Discounts can vary by tier.

Example: This tiered discount gives 20% off for spending \$229:

- Spend \$100 or more and get 10% off
- Spend \$200 or more and get 20% off
- Spend \$300 or more and get 30% off
- Spend \$400 or more and get \$200 off

To create a tiered promotion:

1. Create or edit a promotion.
2. Scroll down to the **Promotion Rule** section.
3. Enter the **Discount**.
4. Click **Add** to add another tier:

Discount:
Buy 50 or more and get 5 Amount Off
Buy 75 or more and get 10 Amount Off
Buy 100 or more and get 20 Amount Off
Add

Shipping Promotions

1. Set Promotion Class to Shipping.

Example: Buy 100 or more and get 10 percent on shipping

Promotion Class:	Shipping	With amount of shipment-qualifying products
Discount:	Buy <input type="text"/> or more and get <input type="text"/> Percent Off	<input type="button" value="Add"/>
Qualifying Products:	Products in category 'mens(Mens)' or subcategories Global product exclusions are enabled.	
	<input type="button" value="Edit"/>	
Shipping Methods:	No shipping methods selected yet.	
	<input type="button" value="Edit"/>	
Alert:	<input type="checkbox"/> Return as approaching promotion. (Only if merchandise total is within <input type="text"/> of the purchase condition.)	
Maximum Applications:	<input type="text"/> per order	
<input type="button" value="Apply"/>		

2. Select the shipping promotion type:

- With amount of shipment qualifying products – this specifies a dollar amount
- With number of shipment qualifying products – this specifies the number of products

3. Fill in the following fields:

Discount

Discounts are applied to shipping and are based on the amount or the number of qualifying products.

Types of Shipping Promotions	Example
Percent Off	Buy a cosmetic bundle and get 20% off ground shipping
Amount Off	Buy \$200 and get \$10 off next day shipping
Fixed Price	Buy \$100 and pay \$5 standard shipping, flat rate
Free	Buy \$100 and get free shipping

Example: Spend \$200 and get free shipping:

Promotion Class:	Shipping	With amount of shipment qualifying products
Discount:	Buy \$ <input type="text"/> or more and get <input type="text"/> Free <input type="button" value="shipping"/>	<input type="button" value="Add"/>

Attribute	Description
Qualifying Products	Select the products to include in the promotion. If none are selected, the system applies the promotion to all products.
Shipping Methods	You can choose <i>how</i> the delivery will be made to the customer (e.g., overnight shipping, ground shipping, etc.) Multiple shipping methods are available. They are required for shipping promotions and you Administrator can add methods using Merchant Tools > Ordering > Payment Methods .
Alert	If you create a discount based on the amount spent, you can set an alert to notify the customer when they are close to the discounted amount. This would require a developer to change the storefront template to display the appropriate messaging.
Maximum Applications	<p>If your application supports multiple ship-to, product shipping promotions are applied on each shipment individually.</p> <p>You can include/exclude products from shipping promotions by ID, Category, Brand, Price, ATS stock level and other attributes.</p>



Practice: Create a Free Shipping Promotion

1. Create a free ground shipping promotion if the customer spends up to \$200 dollars.
2. If the customer spends over \$200, how do you provide them a shipping upgrade that gives free overnight shipping?
3. Create that shipping promotion.

Product Promotions

You can define product promotions for specific products, groups of products, brands, or quantities of products purchased. They can range from a simple 10% off discount to much more complex promotions with multiple products, inclusions and exclusions.

The product promotion rule screen:

Example: 10 percent off

Promotion Class:	<input type="button" value="Product"/>	Without qualifying products With amount of qualifying products With number of qualifying products With combination of products Buy X / Get Y Buy X and Y / Get Z Buy X for Total
Discount:	<input type="text"/> Percent Off	
Discounted Products:	Products in category 'mens' Global product exclusions	
<input type="button" value="Edit"/>		
Maximum Applications:	<input type="text"/>	per order

Select the type of product promotion.

Promotion Class: Product	Example
Without qualifying products	10% off everything
With amount of qualifying products	Buy \$100 or more of the qualifying products and get 10% off discounted products
With number of qualifying products	Buy 2 products of type X (women's shoes) and 1 product of type Y (women's handbag) and get 10% off those products
With combination of products	Buy specific products at the same time for a discount
Buy X and get Y	Buy 2 qualifying products (lipstick and blush) and get 10% off 1 discounted product. If qualifying and discounted products are the same, the discount is applied to the items of lesser value.
Buy X and Y/ Get Z:	Buy 2 products of type X (2 lipsticks) and 1 type of Y (eye shadow) and get 50% off on 1 product of type Z (foundation cream).
Buy X for total	Buy 3 discounted products for a total price of \$50 or 5 discounted products for a total price of \$30.

Note: To ensure that the least expensive product gets the discount for Buy X get Y,

1. Go to **Merchant Tools > Site Preferences > Promotions**.
2. Set **Buy X/Get Y Promotions Behavior** to *Discount next most expensive products (default)*.
3. Set **Discount Precision** to *Precision of site currency (default)*

You can create product promotions based on the products that are purchased, the quantity purchased, the value amount, and the type.

Example: 25% off all products

Types of Product Promotions	Example
Percent off discounted products	10% off Men's pants
Amount off discounted products	\$25 off Jeans
Fixed Price	All men's ties are \$5
Price from price book	\$10 DVDs from the Sale Price Book
Fixed Price Shipping	Buy a cooler and get \$5 shipping
Free Shipping	Buy a Canon camera and get free shipping
Bonus Product(s)	Buy a Canon camera and get a free camera case
Choice of Bonus Product(s)	Buy a sofa and get a free end table

Example: 20% off any product in the shoe category:

Promotion Class: Without qualifying products

Discount: Percent Off

Discounted Products: Products in category 'mens-clothing-shorts(Shorts)' or subcategories
Global product exclusions are enabled.

Maximum Applications: per order

Example: Spend \$200 and get 20% off the category of shoes:

Example: Buy 100 or more qualifying products and get 10 percent on discounted products

Promotion Class: With amount of qualifying products

Discount: Buy or more and get Percent Off

Example: Take 20% off all black products. This example is similar to the previous example, but shows a discount that is based on an attribute. In this example the attribute is color.

Under **Qualifying Products** click **Edit** to select the attribute.

Example: Buy 100 or more qualifying products and get 10 percent on discounted products

Promotion Class:	<input type="button" value="Product"/> <input type="button" value="With amount of qualifying products"/>
Discount:	Buy <input type="text" value="200"/> or more and get <input type="text" value="20"/> Percent Off <input type="button" value="Add"/>

Qualifying Products: Products in category 'womens(Womens)' or subcategories
Global product exclusions are enabled.

You can include/exclude multiple attributes.

Note: The red triangles indicate that you haven't clicked **Save** yet:

promotion can be applied per order

Global Product Exclusions are enabled for entire promotion

Disable Global Product Exclusions:

Included Products 1

Qualifier	Operator	Value	Catalog	
Color (custom.color)	is equal	black		✖

Global product exclusions are enabled.

Example: A customer spends a specified dollar amount (or more) to qualify to receive a bonus product. The customer selects the bonus product from a product list. Note that the “Choice of Bonus Product” may require a template change to display the bonus product on the storefront and allow the customer to choose the bonus product. The level of effort is based on your implementation.

Example: 10 percent off

Promotion Class:	Product	Without qualifying products
Discount:	200	Percent Off Amount Off Fixed Price Price from Price Book Percent Off Product Options Bonus Product(s) Choice Of Bonus Product(s)
Discounted Products:	Press 'Edit' to Edit	
Maximum Applications:	per Order	
	Fixed Price Shipping Free Shipping	

Attribute	Description
Qualifying Products	List the product(s) that are part of the current promotion (e.g., by Price, by ATS, by Price Book, by Product Option ID, by Custom Attributes or by some combination thereof). Leaving this field blank causes all products to qualify for the discount.
Discounted Products	The products that are discounted by this promotion can be a different list than the products that qualify for the discount. To make them identical, check <i>Same as qualifying products</i> box. Example: This allows promotions such as, “Buy a suit and get 20% off any shirt.”
Restrictions	Check this box to restrict this promotion to only allow identical products to qualify for the promotion. Example: If you sell plates and you’d like to offer an extra matching plate..
Maximum Applications	Limits the number of discounted items per order, by limiting the number of times the promotion rule is applied per order.

To create a product promotion:

1. Go to **Merchant Tools > Online Marketing > Promotions** and click **New**.
2. Complete the **ID**, **Name**, and **Exclusivity** fields and click **Apply**.
3. Set **Promotion Class** to **Product**.
4. Select the type of promotion.
5. Enter **Discounted Amount**.

6. Enter the following as applicable: Excluded Products, Qualifying Products, Discounted Products, Restrictions, and Maximum Applications.
7. Click **Apply**.



Practice: Create a Product Promotion

1. Which promotion would you use to create a product promotion to promote a women's shoe with, "Buy 2 pairs and get the 3rd pair at 50% off?"
2. Create the promotion and be sure to set Exclusivity: NO.



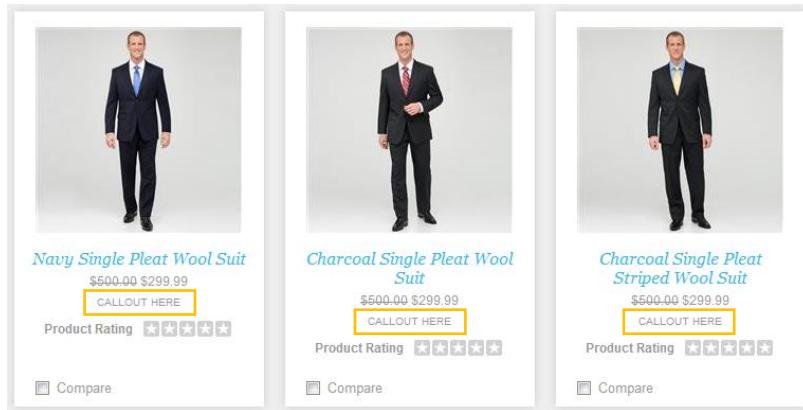
Lesson 12.3: Promotion Visualizations

Your storefront may use some or all visualizations. Your promotional strategy includes the visualization for your campaigns and the promotions associated with the campaigns. Content Slots are frequently used to visualize promotions, and provide messaging to different customer groups. Custom visualizations may be added.

Attribute	Description and Location	Example
Name	Displayed in shopping cart.	<i>20% Off your Order</i>
Callout Messages	Optionally displayed in shopping cart, product detail page or the product listing page.	<i>Free Ground Shipping on shipments over \$500!</i>
Promotion Details	Optionally used to communicate qualifiers, conditions and exclusions. Optionally displayed in a custom location.	<i>Offer available in the continental United States on shipments over \$500. One shipment per order. Available for a limited time only</i>
Images	Used to draw attention to promotion. Optionally displayed in a custom location.	A product image can be displayed next to the text of a promotion.

Callout Messages

You can customize the location of *callout messages*. By default, SiteGenesis displays callout messages in the cart, in the Product Detail Page, and below a product in the product listing page.



The screenshot shows three product cards for men's suits. Each card features a thumbnail image of a man in a suit, followed by the product name, original price (\$500.00), sale price (\$299.99), a 'CALLOUT HERE' button, a product rating (4 stars), and a 'Compare' link.

- Navy Single Pleat Wool Suit**
\$500.00 \$299.99
CALLOUT HERE
Product Rating ★★★★
 Compare
- Charcoal Single Pleat Wool Suit**
\$500.00 \$299.99
CALLOUT HERE
Product Rating ★★★★★
 Compare
- Charcoal Single Pleat Striped Wool Suit**
\$500.00 \$299.99
CALLOUT HERE
Product Rating ★★★★★
 Compare



Lesson 12.4: Inclusions and Exclusions

You can include and exclude products from a promotion based on:

- Product ID
- Category assignment
- Price
- Brand
- ATS (Available To Sell value in the Demandware inventory model)
- Custom product attributes (depending on data type)

Examples:

- Exclude product IDs SHIRT-19 and SHIRT-26
- Include all products in category Sweaters with a price less than \$40
- Exclude all products from brand Premium Shirts with a price greater \$59
- Exclude all products with inventory Available-To-Sell (ATS) less than 10

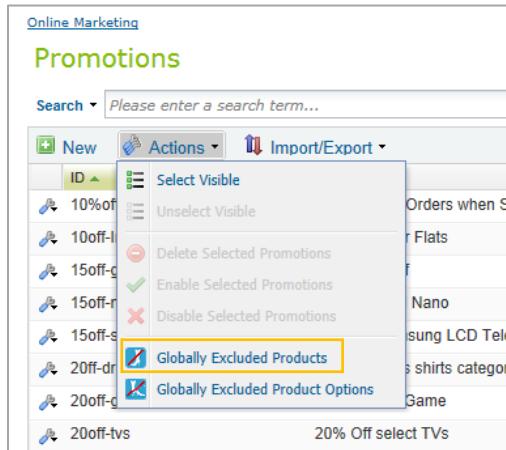


Lesson 12.5: Global Exclusions

You can make global exclusions from all promotions (select categories, products, brands, gift cards, etc.). You can override global exclusions at the promotion level.

To create a global exclusion:

1. Go to **Merchant Tools > Online Marketing > Promotions**.
2. From the **Actions** dropdown, select **Globally Excluded Products**.



The screenshot shows the 'Promotions' section of the Demandware interface. A context menu is open over a list of promotions, with the 'Globally Excluded Products' option highlighted by a yellow box.

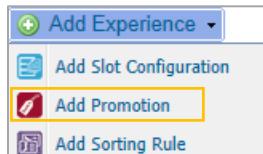
3. Configure the products to globally exclude.
4. Click **Save**.



Practice: Create Experiences

Attach promotions to campaigns by creating experiences.

Open the campaign and add your Order, Shipping, and Product Promotions.



The screenshot shows a dropdown menu with several options: 'Add Experience' (selected), 'Add Slot Configuration', 'Add Promotion' (highlighted with a yellow box), and 'Add Sorting Rule'.



Practice: Test Your Promotions

Test your promotions on the storefront by adding products to your basket. When you've added more than the minimum amount you should see the Order discount appear above the total.

Module 13: Additional Campaign Details

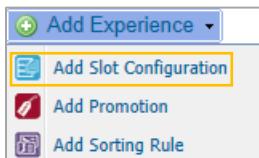
Feature	Description
Schedule	<p>When you add the promotion experience, the promotion inherits the start and end date from the campaign. It also inherits the customer group from the campaign. You can override the schedule by clicking on the field and using a calendar that enables you to select from the various scheduling options:</p> <ul style="list-style-type: none"> ▪ Date Range - Specify a start date and end date ▪ Time Range - Specify a start time and end time (optional) ▪ Date Range Specific Schedule - Promotions can be run on specific days of the week such as Weekdays only or Tuesday Specials. (Optional) <p>Promotions can run for a specific time of day such as mornings only, midnight sale or door-buster sale.</p>
Required Qualifiers	<p>If you use multiple qualifiers at the same time, you can choose to allow any qualifier to trigger the promotion, or require that all qualifiers are necessary to trigger the promotion.</p> <p>Example: Two qualifiers can both be required such as registered customers (a customer group) who must also have a coupon.</p>
Promotion Rank	<p>Select a number between 10 (highest) and 100 (lowest) in increments of 10. This is used as a <i>tie-breaker</i> when a campaign has multiple promotions with conflicting schedules, qualifiers and exclusivity. By default, a promotion has no rank and is considered lower than 100.</p>
Exclusivity	<p>This will display the exclusivity status of:</p> <ul style="list-style-type: none"> ▪ NO (Can be combined with any promotion) ▪ CLASS (Cannot be combined with promotions of same class) ▪ GLOBAL (Cannot be combined with any promotion)
Enabled	<p>Displays the enabled/disabled status of the promotion.</p>

Add a Slot Configuration

Content Slots are placeholders for content. You set content slots to display based on a particular experience.

1. Click **Add Experience**.

2. Select Add Content Configuration.



3. Select the desired content configuration.

4. Click **Apply.**

Slot Configurations (1 experience)					
ID	Slot ▲	Context	Schedule	Customer Groups	R... E... C...
New Slot Config...	search-promo		12/01/2014 - 12/30/2014	Everyone	-... Y... C...

5. Review and modify the schedule (if applicable).

6. Review and modify the **Customer Groups (if applicable).**

You may have a customized message for a selected group.

7. Identify required qualifiers.

8. Rank the content slot (if applicable).

9. Click **Apply.**

The order in which content slot configurations are applied can be controlled using ranking. For each slot configuration, you specify ranking from 10 (highest) to 100 (lowest) in increments of 10. The highest rank takes precedence.

Add a Sorting Rule

To add a sorting rule as an experience:

1. Click **Add Experience.**

2. Select **Add Sorting Rule**.
3. System displays a list of configured sorting rules.
4. Select the desired sorting rule.
5. Click **Apply**.
6. Review and modify the Schedule (if applicable).
7. Review and modify the Customer Groups (if applicable). You may have a customized message for a selected group.
8. Identify required qualifiers.
9. Click **Apply**.



Lesson 13.1: Avoiding Stacking

Stacking occurs when two promotions compete. If multiple promotions are running at the same time it is possible for customers to receive multiple promotions at the same time.

According to your needs and your company policies you may allow this or you may wish to prevent it.

Examples of Stacking

You could create two promotions that happen at the same time.

These promotions will **not** stack because they apply to different products:

Promotion 1: 20% Off Women's Shoes (On the same date with Exclusivity: No)

Promotion 2: 15% Off Men's Suits (On the same date with Exclusivity: No)

These promotions will stack:

Promotion 1: 20% Off Women's Shoes (with Exclusivity: No)

Promotion 2: \$50 Off Women's Shoes (with Exclusivity: No)

These promotions will **not** stack - because the Exclusivity is Global

Promotion 1: 20% Off Women's Shoes (with Exclusivity: Global)

Promotion 2: \$50 Off Women's Shoes (with Exclusivity: Global)

Preventing stacking using Rank

Promotion 1: 20% Off Women's Shoes (with Exclusivity: Class, Rank: 10)

Promotion 2: \$50 Off Women's Shoes (with Exclusivity: Class, Rank: 20)



Best Practices

These considerations will help you to avoid stacking:

- Be careful when you enable or disable promotions
- Schedule the promotions to avoid overlapping dates
- Use Qualifiers: Coupons, Source Codes, Customer Groups to allow correct access
- Many promotions should be Exclusivity: Class or Global
- Few promotions should be Exclusivity: No
- Rank the promotions so they are applied in the correct order with 10 as the highest



Lesson 13.2: Process for Creating Promotions

Creating discounts is flexible in Demandware. You could create qualifiers, then create the promotions then create the campaign or you could reverse that process.

Either way, use the following checklist as a recommended workflow for creating campaigns, promotions and their qualifiers.

- Create qualifiers – coupons, source-codes and/or customer groups
- Create campaigns – to group promotions together and organize them
- Create promotions – to specify the discounts
- Schedule the promotions
- Add promotions, sorting rules and/or content slots to the campaign
- Add qualifiers to the campaign and/or promotions
- (Optional) Create content slot configurations on the storefront to provide promotional messaging to advertise offers
- Test the promotions, qualifiers, content slots and sorting rules

Note: Campaigns are required. You cannot run a promotion without a campaign. At least one qualifier is also required, such as the customer group, Everyone.



Practice: Create a Campaign with Multiple Promotions

How do you create a holiday season campaign will run from December 1 to 15 of the current year?

- Include your promotion for free ground shipping that will be offered to everyone.
- Include a promotion targeted to your big spenders offering them Free Two-Day Express Shipping if they spend over \$500 from December 16 to December 21?



Practice: Create a Promotion that Requires a Coupon

1. Create a new sub-category called “bracelets.”
2. How do you offer a 10% off discount on everything in the sub-category and distribute the offer with a coupon code?
3. Create the category, offer and coupon.
4. Test them in the storefront.



Lesson 13.3: Campaign and Promotions FAQs

Question: How can you create a secret promotion?

Answer: Create a source code to redirect the customer to a hidden category. Create the hidden category first and then fill it with the products you wish to promote. Create the promotion for that category. Build the source code link, which includes a redirect to the hidden category. When the customer clicks on the link they will see the secret promotion.

Question: You want to create a special page of products for B2B. How can you create a source-code redirect to a special pricing page on the storefront? You don't want customers to see the special B2B products.

Answer: Create a price book. Then use a source-code group to redirect to a hidden category page with the products from the price book.

Question: How can you give different codes to your affiliates so you can track the traffic they generate?

Answer: Create a source-code group with a single ID and multiple codes that will have the same behavior. Use different codes to create a URL for each affiliate. Because they use the same ID they will have the same behavior.



Lesson 13.4: Campaign and Promotion Troubleshooting Checklist

- Is the campaign enabled?
- Is the promotion enabled?
- Did you click **Apply**?
- Do the dates of the promotion match today's date or the preview date?
- The dates of the promotion must be within the date range for the campaign.
- A common mistake is setting the promotion to dates Dec 1-31 then previewing the date Dec 1. The promotion is not displayed because Dec 1 is out of range by 1 minute.
- Is the schedule for the campaign/promotion set to continuous?
- Using the Storefront Toolkit, did you select site preview and set a date that matches the date range of the promotion?
- If it's a product promotion, did you include products? You can't just exclude them.
- Is the amount in shopping cart enough to trigger the promotion?
- Is the number of items in cart enough to trigger promotion?
- Does the promotion conflict with another promotion?
- Did you try to change the exclusivity to "No (Can be combined)"?
- Did you try to set the customer groups qualifier to "1 (Everyone)"?
- Did you update the shopping cart so that your recent changes are applied to the cart?
- If you're doing a shipping promotion you'll have to "check out" to see the promotion applied.



Best Practices

Best Practices for Messaging

Descriptions should appear on the storefront and identify promotion restrictions, limitations, exclusions or conditions. This will help to minimize support calls.

Examples of storefront messages:

- "While supplies last"
- "One discount per order"
- "Offer ends at midnight EST"
- "Following brands are not eligible for this promotion"

Best Practices for Testing

Create a test plan which can include:

- Test combinations of promotions
- Test the promotion before you add a qualifier
- Test that the qualifiers work as intended: coupons, source-codes and customer groups
- Are descriptions displayed as intended?
- Test promotions before, during and after the promotion timeframe to see that the discount appears only when condition is met and disappears when the qualifying condition removed
- Test in Staging, Development or a Sandbox environment using the Storefront Toolkit and consider doing validation in Production after data replication occurs.

Who should test?

- Both the creator and the requestor should test.
- Promotions should be tested as soon as they go live into production.

More Best Practices for Promotions

Identify clear roles and responsibilities related to online promotions.

Develop a promotions workflow for build, review and release.

- How will requests for online promotions made?
- Who will add the content assets into the system?
- Who will build the promotions?
- Who will manage promotions once they go live?
- Will signatures be required, and at which steps?
- Who will identify timelines and deadlines?
- Will past promotions be removed? What approach will be used?
- Demandware recommends that you remove outdated marketing materials such as promotions and source-codes.

Note: Creating multiple promotions may be easier than forcing everything into one promotion.

Allow extra time for a promotion

- If a promotion ends at midnight and a customer is checking out at that time they would lose the promotion. Instead, advertise, "Until midnight" but allow the promotion to end at 12:15. This prevents support calls.
- To change the time zone for your site:

- **Administration > Sites > Manage Sites > {Your site name} > Time Zone**

Limit the stacking of promotions by using many Exclusivity: Global and many Exclusivity: Class promotions but few Exclusivity: No promotions.

Promotions Play Book

All of the information you need to create promotions in Demandware:

<https://xchange.demandware.com/docs/DOC-14685>

Module 14: Product Images

Objectives

Upon completion of this module, you will be able to:

- Explain the options for managing product images
- View, manage and change product images

Overview

Products images are stored as a part of the catalog but stored separately from products. The images can be imported manually or imported automatically on a schedule.

If a product has variations it will be necessary to have images stored for each variation. For example, if a product varies in color, images for each color are necessary.

Demandware offers multiple options for image management:

- Store and manage images using multiple View Image types.
- When using View Image types, the same product image is managed in multiple sizes such as Large, Medium, Small, and Swatch. Custom image types can also be created.
- A viewtype allows the Merchant to group images according to usage context, for example, by the image's size.
- You can have multiple viewtypes and multiple images per viewtype and per product.
- Typical viewtypes are:
- **Large** - for the product detail page



- **Medium** – for category and search results:



Men's Talkoot 2-In-1
Waterproof System
~~\$295.00~~ \$250.75

- **Small** – to indicate on the product detail page that other images of this product are available



- **Swatch** – to show the available colors

Color: Thunder



Using the Dynamic Imaging Service

The Dynamic Imaging service resizes all product images from a single, high-resolution master image with a single aspect ratio.

Note: To obtain a working instance of the Dynamic Imaging service, contact your Retail Practice representative. This service is purchased separately. Using this service, product images are populated via batch upload directly to WebDAV. Typically, a script is run to update the catalog with image paths. This update is based on path naming conventions. The result is one high resolution image for each product and all other images will be derived from that one high resolution image.

The Dynamic Imaging service can generate:

- A scaled image with a locked aspect ratio.
- An image that contains a cropped area taken from a larger image.
- An image that overlays another image at a given position.
- An image whose format is different than the original image (for example, jpg to png).

Manage images with third party software such as Scene7.

For details about Scene7 and other third party applications, see the relevant third party documentation.



Discussion

- How will product images be handled on your site? Using multiple Image Types in Demandware, through the Dynamic Imaging Service, or through a third party?

Supported Image File Types

Demandware supports many image formats including: JPG, GIF, PNG, BMP and TIFF. Flash files are also supported.

Zip files are supported and can include the directory structure in the zip file. The upload process will unzip the files. The size of the file is limited to 100MB.

There are two methods that can be used to import image files, zip files and Flash files:

- Import & Export (**Products and Catalogs > Import & Export > Manage Product Images**)
- WebDAV (**Admin > Site Development > WebDAV**)

Viewing Product Images

There are two ways to access and view product images:

- Go to the storefront and use the toolkit and select **Content Information** to open a product
- Open the product in Business Manager Merchant Tools > **Manager > Products and Catalogs**.



Lesson 14.1: Adding Product Images to the Product Image Library

To upload product images:

1. Go to **Merchant Tools > Products & Catalogs > Import & Export > Manage Product Images**.
2. In the **Product Image Upload** section, click **Manage Product Images**.
3. Select a catalog and click **OK**.

[Import & Export](#) > [Product Images - Select Catalog](#) > Product Image

- Under Directories, click to collapse a folder; click to expand a folder.
 - Click the name of a folder (not the radio button) to display its contents in the **Files** section below.

When the folder is selected, *the folder name displays with a white background*, its subfolders expand, and the images in the folder display under **Files**. In this example, *images* is selected and the files displayed are from the images folder.

Directories

New Directory: Add

Sites-storefront-catalog-en

- + images
- + pwr

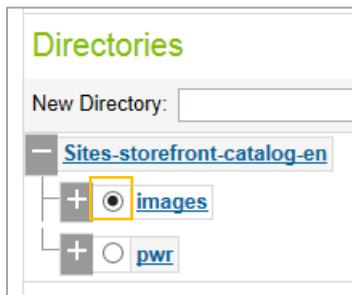
Rename Delete

Files

Upload File: Browse... Upload

<input type="checkbox"/> Select All	Name	File Size	Last Modified
<input type="checkbox"/>	 MenuBanner-Electronics.jpg	14.98 KB	2/14/14 8:51:46 pm
<input type="checkbox"/>	 MenuBanner-Mens.jpg	17.40 KB	2/14/14 8:51:46 pm
<input type="checkbox"/>	 MenuBanner-New Arrivals.jpg	21.02 KB	2/14/14 8:51:46 pm
<input type="checkbox"/>	 MenuBanner-Womens.jpg	18.47 KB	2/14/14 8:51:46 pm
<input type="checkbox"/>	 MenuBanner-Blank.jpg	0 KB	2/14/14 8:51:46 pm

Note: Do not use the radio button next to the folder:



The only time it is necessary to use the radio button is to delete or rename a folder.

Adding a Folder

Enter the name in the **New Directory** box and click **Add**:



Add an Image to a Folder

Once a folder has been selected, scroll down to see the files in that folder:

Files				
	Name	File Size	Last Modified	
<input type="checkbox"/>	 MenuBanner-Electronics.jpg	14.98 KB	2/14/14 8:51:46 pm	
<input type="checkbox"/>	 MenuBanner-Mens.jpg	17.40 KB	2/14/14 8:51:46 pm	
<input type="checkbox"/>	 MenuBanner-New Arrivals.jpg	21.02 KB	2/14/14 8:51:46 pm	
<input type="checkbox"/>	 MenuBanner-Womens.jpg	18.47 KB	2/14/14 8:51:46 pm	
<input type="checkbox"/>	 WomensMenuBottomBanner.jpg	5.16 KB	2/14/14 8:51:46 pm	

To upload a file:

1. Click **Browse**.
2. Select the file and the filename will be displayed.
3. Click **Upload**.
4. The file will be displayed in the folder that was selected earlier. Preview the image by clicking on the thumbnail or on the filename.



Demonstration: Product Image Library

Store an image in the product image library.



Practice: Store an Image

1. Go to **Merchant Tools > Products and Catalogs > Import & Export**.
2. Under **Product Image Upload**, select **Manage Product Images**.
3. Select **apparel-catalog**, the apparel master catalog.
4. Add a directory and rename the directory.
5. Locate a convenient image (or grab one from Google Images).
6. Import the image and make sure the image goes into the *correct* place in the tree.



Lesson 14.2: Changing Product Images

Once product images have been placed in the product images library they can be linked to products. This process is frequently automated by giving the image a specific filename that includes the ID and variation of the product that will be attached to the image.

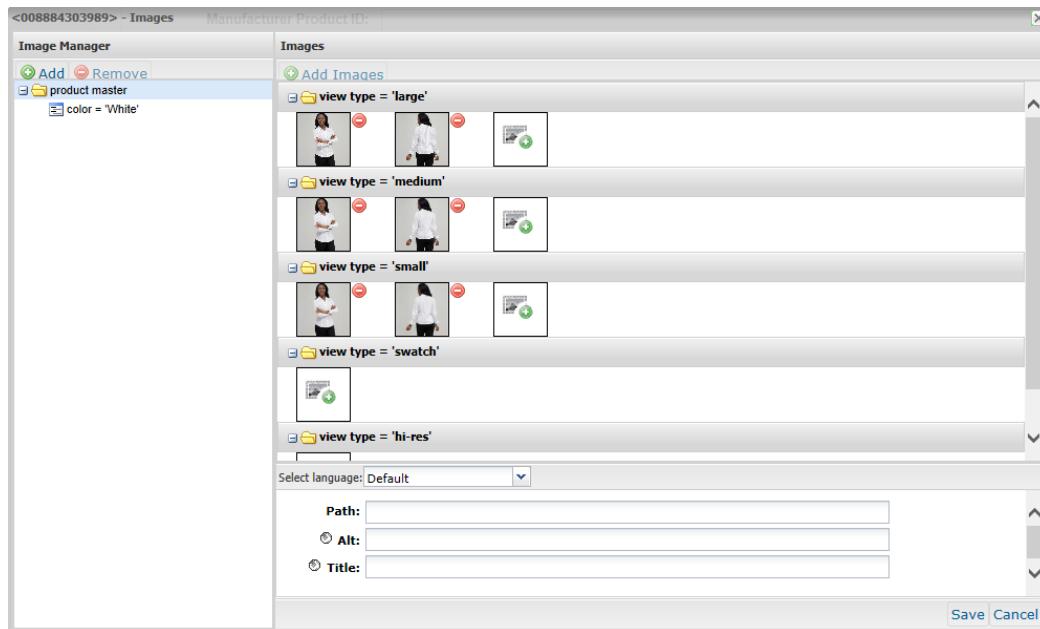
To change product images:

1. Go to **Merchant Tools > Products and Catalogs > Products**.
2. Find a product and lock it for editing.
3. Scroll down to the **Images** section.
4. Click **Edit**.

Images:  13 image(s) configured. Configured for view type(s): 'large' 'medium' 'small' 'swatch'

Edit

The image manager displays with the variations on the left. The image manager is used to drag images from the library folder and apply them to the product variations.



- In the Images section (on the right), the folders are organized by view type. Click the green plus sign to add images.



- To change the order of images, point to the center of an image and drag it to the center of another image.

Demandware supports multiple view types for each of the variations and the variation master. Alt-text can also be entered for the images.



Practice: Change a Product Image

- Lock a product.
- Modify the product to change an image to a noticeably different image.
- View the product detail page on the storefront.

Conclusion

The Demandware Business Manager is a feature-rich solution for eCommerce that enables merchants to use a browser to manage many aspects of the storefront including: catalogs, categories, products, pricing, inventory, searching, sorting, campaigns, promotions, images, content assets and content slots.

Next Steps

Practice using Business Manager in Development or in a Sandbox. Additional resources include:

Documentation	Available through a link in Business Manager
XChange Collaboration Center	There is a space for clients and partners to discuss the features and capabilities of Demandware products. Visit the space for Merchants and Marketers: https://xchange.demandware.com/community/merchants_and_marketers
Additional Courses	Go to: https://xchange.demandware.com/community/education and click on the Training tab.
Coffee Talk Webinar Library	https://xchange.demandware.com/docs/DOC-6451