Infor Distribution Storefront Administration Guide

Release 2.0.50x

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Contents

About this guide

Use Infor Distribution Storefront (Storefront) to take advantage of business-to-business and business-to-consumer website sales opportunities.

This guide leads the administrator user through the setup and maintenance of Storefront using Infor Distribution Storefront Administration (Storefront Administration). This guide explains how to configure options, create user accounts, and set up website features like shopping lists, order confirmation documents, and shipment tracking.

Intended audience

This guide is intended for Storefront administrators.

Related documents

These documents are in the product documentation section of Infor Xtreme:

- *Infor Distribution Storefront Release Notes*
- *Infor Distribution Storefront Hardware and Software Requirements*
- *Infor Distribution Storefront Installation Guide*
- *Infor Distribution Storefront Catalog User Guide*
- The appropriate ERP installation and integration guides

Online help is available for Storefront Administration, Storefront Catalog, and Storefront Commerce.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Storefront overview

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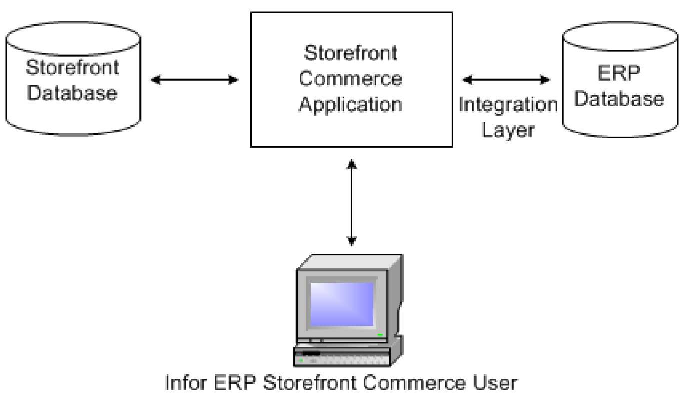
Storefront works with your ERP system to provide a robust business-to-business (B2B) and business-to-consumer (B2C) Internet solution that lets customers browse your product catalog and submit orders or quotes. The ability to provide 24-hour online access to your catalogs is crucial in today's fast-paced business market. Storefront offers your customers real-time item price and availability, order tracking, and customized specials and shopping lists.

Storefront structure



When Storefront users log on to your website, they are interfacing with Infor Distribution Storefront Commerce (Storefront Commerce). Storefront Commerce interfaces in turn with the Storefront database and your ERP system, using the integration layer. The Storefront database provides account information, specials and shopping lists, and Storefront codes and configuration. It also stores your catalog information, including page layouts and catalog and item information. The integration layer interfaces with the ERP database for item pricing and availability information that the catalog needs for stocked items. Together these components present a seamless and real-time Web shopping experience for users.

Note: Some features may not be supported by your ERP system. See the appropriate ERP integration guide for additional information.

Storefront data

The data that website users access in Storefront comes from several sources. Item information, such as attributes and attachments, comes from the catalog set up in Infor Distribution Storefront Catalog

(Storefront Catalog). The item descriptions displayed for website users also can be edited in Storefront Catalog. However, price and availability information for items, which is real-time, is retrieved either from the ERP or the supplier's website, depending on the type of item.

Information from the ERP is used in several different ways. Some information is used to help define information in the application for processing. For example, when accounts are defined, they are assigned to a company. This type of assignment is not visible to account users, but it ensures that orders for their accounts are processed correctly.

Some information is used to help define information in the application for specific functions. For example, carrier codes can be associated with a shipping URL to allow for tracking shipments for that carrier.

Storefront Administration application

Storefront Administration is a Web-based application that allows you to import data and create accounts, set options, set features, and generally maintain the system. The Storefront Administration interface is secured, requiring a user ID and password. You can create multiple users for Storefront. Each user has the same security within the system.

Storefront Administration consists of a single **System Administration** menu which is persistent in the left pane. This menu has a link for each area maintained by system administrators. Clicking a link allows you to work in that area, to perform tasks like creating, editing, and deleting. For example, if you click the Accounts link, you can create accounts, edit accounts, set options for accounts, and delete accounts.

For more information, see "Navigating Storefront Administration" on page 11.

Storefront Commerce interfaces

Storefront Commerce is a Web-based application accessed using the Internet. It lets users browse a catalog, make purchases, and review order status, depending on their account options and interface. Storefront Commerce supports business-to-business (B2B), business-yto-consumer (B2C), and Customer Inquiry (CI) users. Different features are available for each area. For example, the link to review accounts receivable information is limited to B2B users who are authorized for the feature. The CI interface provides access to four inquiries: Account Summary, Open Invoices, Paid Invoices, and Review Orders. This interface is intended for executive-level users who need high level access to ordering and account information, but who do not need to place orders. The features of the user interface are determined by the account type and the system and account settings.

Getting started

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Before you use Storefront Administration to set up your online store, review these topics:

- "Logging in and out" on page 11
- "Navigating Storefront Administration" on page 11

Logging in and out

After you install Storefront, you are ready to log into Storefront Administration and begin account and system maintenance.

This first time you log in, you must use the administrator user ID and password (admin, admin). The administrator user ID and password are included as part of your installation. After you have logged in, you can create a new user ID and password for you and other Storefront Administration users. See "Creating administrative users" on page 29 for more information about creating user IDs.

Note: To use Storefront applications, JavaScript must be enabled in your browser. Do not disable this setting when using Storefront applications.

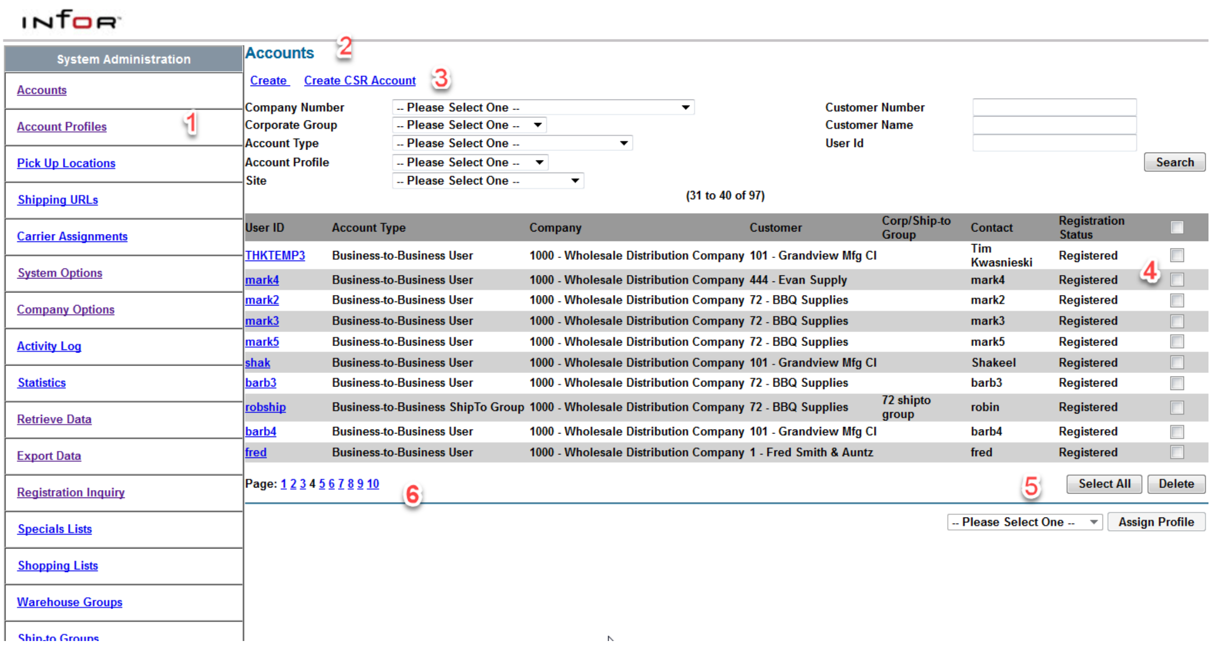
To log in:

1. Launch Storefront Administration. The login page is displayed.
2. In the **User ID** and **Password** fields, specify **admin**.
3. Click **Login** or press **Enter**. The System Administration home page is displayed.

To log out, click the Logout link in the **System Administration** menu.

Navigating Storefront Administration

This topic provides a description of the user interface and its conventions.



The interface includes the following features:

1. The **System Administration** menu provides links to all of the application task areas. You can click a link to work in that area.
2. Page titles indicate the task area in which you are currently working.
3. The links on the pages are used to move to another page in the application. A link may indicate an action, such as Create, or an element of data, such as a user ID you can click to review user information in detail.
4. Check boxes are used to make a selection. To select from the list, click the check box. A check mark is displayed in the box to indicate that it is selected. To clear a selection, click the check box again to remove the check mark. To select an entire list, click **Select All**.
5. Buttons are used to perform specific actions on page, such as select all, delete, or update.
6. Page links are used to move through multiple pages of results. Click a page number to go to that page or, when available, click the forward arrow (>) to advance to the next page.

Setting up Storefront

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The topics in this section provide step-by-step instructions for setting up Storefront using Storefront Administration. Topics are listed in the order in which they must be performed. Setting company options and creating administrative users are optional.

Note: For information about setting up your online store catalogs, see the *Infor Distribution Storefront Catalog User Guide*.

Retrieving data

Storefront uses data, such as companies, warehouses, codes, and postal zones, from the ERP system. For this data to be available to Storefront, it must be retrieved from the ERP. Use the Retrieve Data feature to select the data to retrieve from the ERP, retrieve the data, and store it in the Storefront database.

To retrieve ERP data:

1. Select **System Administration > Retrieve Data**.
2. Select the types of data to copy to Storefront. Click **Select All** to select all of the data types.
3. Click **Retrieve Data**. When the process is complete, a message is displayed.

   The first time you run the retrieval process, it may take several minutes to complete due to the initial volume of data being retrieved. Subsequent retrievals can be limited by data type. For example, if you know that hold codes have changed, you can select to retrieve only hold codes. Limiting the retrieval this way allows you to get the data you need more quickly.

When to retrieve data

Note: Refer to the Storefront implementation integration documentation delivered with Storefront integration components for details regarding which data is available with your ERP.

To keep Storefront data current, retrieve data each time any of the following information changes on the ERP:

- Companies
- Warehouses
- Countries
- States
- Carrier codes
- Hold codes
- Corporate groups
- Postal zones
- Alternate warehouses

When you run a data retrieve, company and warehouse data are always included.

Note: See the Storefront implementation integration documentation delivered with the Storefront integration components for details regarding which data is available with your ERP.

Setting up system options

Use the system options to customize your product and its function. Certain system options can be overridden at the account level. See "Setting account options" on page 43.

To set system options:

1. Select **System Administration > System Options**.
2. Specify this information:

   Note: Fields marked with an asterisk (*) in this topic can be overridden for an individual user at the account level.

   For system options:

   Web Version
   The current version of your Web product is displayed in this field.

   Operation Mode
   Select **B2B Only** to run a business-to-business only website. This type of operation mode provides an interface for registered users defined as customers on your ERP. Select **B2C Only** to run a business-to-consumer only website. This type of operation mode provides an interface for guest users. Select **B2B and B2C** to run both a business-to-business and business-to-consumer website. This type of operation mode provides an interface for all types of users, registered and anonymous. The features available to each type of user are tailored based on their account type.

Commerce Site URL
Specify the commerce URL to be used as a prefix for URLs that are generated in EasyAsk by the Sitemap generation process for SEO (Search Engine Optimization). Use this format: `http://<hostname>/storefrontCommerce`.

Email address for Contact Us
Specify the email address that should be used to contact your company when users click the Contact Us link.

Email address for account rep
Specify the email address of the CSR who is responsible for notifications from customers for a request to receive a copy of an invoice. After the request is received by the CSR, the CSR would then send the customer the invoice using email. This is for B2B customers only.

For order entry options:

Payment type for all orders*
Select your payment types:

- Select **Credit card** if orders will require a credit card number for payment during check out.
- Select **On account** if order payment will be accepted on account.
- Select **ACH-Check** for use with CenPOS ACH-check payments.

The user can make a selection and provide the appropriate information on the Checkout page.

Note: B2C and guest users must pay by credit card.

Number of invalid credit cards entered before checkout is disabled
Specify the number of times a user can attempt to use a credit card without successful processing before the account is locked.

Replace "on hold" order status msg with
Specify text that should be displayed when an order is on hold. This text replaces the generic message shipped with Storefront. This message is displayed when users review order information.

Shipping instructions message
Specify text that should be displayed as the default shipping instruction.

Display the end order message*
Select this option to display a message when users complete and submit an order. If you select this option, use the **End order message** field to specify your message. Clear this option if no message is to be displayed.

Alternate Out of stock message
Specify an alternate message to display for order as needed type of items, for example, **Order as Needed**.

End order message*
Specify the text to display when users complete and submit an order.

Change Current Warehouse*
Select **Yes** to allow users to change warehouses for searching and ordering. The **Current Warehouse** label in Commerce becomes a link to open the Warehouses form, where users can change the current warehouse. If users have a warehouse group assigned to their account, then only warehouses in the group are displayed on the Warehouses form. If they do not have a

warehouse group, then all warehouses are displayed. Select **No** to prevent users from changing the current warehouse. The warehouse is displayed in Storefront Commerce, but it cannot be changed.

Allow Warehouse Default Ordering Unit of Measure
Specify **Yes** to use the warehouse ordering unit of measure. Specify **No** to use the default stocking unit of measure in Storefront Commerce when you order an item.

For example, item A250 has a stocking unit of measure of **CAS** and **BOX**. Warehouse 2 has the default ordering unit of measure as **EA**. If you specify **Yes**, the default unit of measure is **EA** but you can also select **CAS** or **BOX**.

Allow Suspended Items
Select **Yes** to allow suspended items to be added to the shopping cart from the order pad and line item add. These items should be replaced by the ERP at the time of the checkout. A suspended item can be ordered if a replacement has been set up in the ERP. After the order has been submitted, the replacement item is added to the order and the suspended item is removed.

Select **No** to hide the suspended items in shopping lists, wish lists, order history and so on. Suspended items cannot be ordered, regardless if a replacement item has been set up in the ERP.

Add Items advance to cart
Select **Yes** to display the shopping cart immediately after the shopper adds an item to the cart. Use this option to display the shopping cart after each item for those shoppers who typically add a small number of items to their carts, for example, saved B2C shopping carts with less than 30 items. A cart validation is performed on all cart items each time an item is added to the cart. Because of the cart validation used for this option, the performance may be slower.

Select **No** to display the same page from which the shopper added the last item to the shopping cart. Use this option to maintain a natural flow and provide a faster shopping experience. Shoppers can continue shopping and adding items to their shopping carts from the same page where they selected the previous item. A cart validation is performed only when shoppers select the **Cart** button. Because of the cart validation used for this option, the performance may be faster.

Note: This option refers to the **Add to Cart** button on the bottom of the screens when multiple items are ordered. This option does not apply to the **Add to Cart** link on the side of the screen that is used in multiple page layouts.

Display pickup locations* (B2B Only)
Select **Yes** to display available pick-up locations for users who have access to pick-up locations. Pick-up locations are displayed at checkout. See "Working with pick-up locations" on page 81.
Select **No** to hide pick-up locations.

Format price up to decimal places
Specify the number of decimal places for prices to be displayed. Valid values are 0 thru 9.

Enter the maximum number of months for order history transactions
To limit the amount of transaction history available in the order history inquiry, specify the maximum number of months for which to retrieve order history data. Users can inquire on orders placed between the current date and the maximum number of previous months. For example, if you specify **6** and it is June 30, orders submitted between January and June will be included in the order history.

Enter the number of days to add to the submit date to determine the quote review date (B2B Only)
Specify the number of days that is used to calculate the date for quote reviews. For example, if you specify **7** in this field and a customer submits a quote on July 1, the quote review date will be July 8.

Number of days to save saved orders
Specify the number of days to keep a saved order. Specify **0** to keep saved orders indefinitely.

Email order confirmation*
Select **Yes** to send an email message to users when an order or quote is submitted. Otherwise, select **No**.

Email SMTP server
Specify the name or IP address of the SMTP server to which Storefront should connect to process order confirmation e-mail messages. If you are using an external SMTP server, such as Gmail or Yahoo, you must append the port number to the Email SMTP server address. For example, specify **smtp.gmail.com:587** for Gmail and **smtp.mail.yahoo.com:25** for Yahoo. Ensure that the certificate is configured to connect securely to the SMTP server.

Email SMTP from address
Specify the address of the email account from which to send order confirmation messages. You can use this address for messages to all users, or specify a different address for messages sent to B2C users in the **B2C Override SMTP from address** field.

B2C Override SMTP from address
Specify the address of the email account from which to send order confirmation messages to B2C users. This address is used for B2C users instead of the address specified in the **Email SMTP from address** field.

Email SMTP user
Specify the ID of the user for the SMTP server. This user ID is used to log into the server. This field is required for SMTP and POP3 authentication. Leave this field blank if you are using an open relay server.

Email SMTP password
Specify the password for the SMTP server user. This password is used to log into the server. This field is required for SMTP and POP3 authentication. Leave this field blank if you are using an open relay server.

Email document*
Select the document to send by email when an order confirmation is sent. The documents in this list are created using the**Email Documents** option. See "Creating email documents" on page 85. You must select a document layout in the **Order Confirmation Document Layout** field to determine the information available in the PDF attached to the email message.

Allow alternate carrier*
Select this option to allow Storefront Commerce users to select a carrier other than their default carrier at checkout. Clear this field if only the default carrier should be displayed, and no ability to select a different carrier should be provided.

Note: The default carrier for an order is the carrier assigned to the customer ship-to address. If no carrier is assigned to the ship-to account, then the carrier for the customer is used.

Include Freight on Orders*
Select **Yes** to display freight charges on the Checkout page in Storefront Commerce. If you select **Yes**, you must set up freight data in your ERP system. Select **No** to hide freight charges.

Freight Rate Shopping during Checkout*
Select **Yes** to display shipping rates in Storefront Commerce. The rates are displayed next to available carrier names in the **Shipping Method** field on the Checkout page. Select **No** to prevent display of shipping rates. This option is available only if you set the **Allow alternate carrier** and **Include Freight on Orders** options to **Yes**.

Allow Item Warehouse
Select **Yes** to allow Storefront Commerce CSR account users to change the warehouse at the line for a selected item. The option for changing the warehouse is displayed on the Item Detail page. Select **No** to prevent CSR users from changing the warehouse for individual items.

For user account options:

New account registration option (B2C Only)
Specify how to handle account requests from B2C users. Select **Create Web User** if the B2C user can enter the necessary information to register an account. Select **Request Account** if the B2C user can enter only general information to request an account, and the administrator must then complete account creation for the user. You must have an administrative user account set up with an email address to select this option.

Allow users to edit Contact Information* (B2B Only)
Select **Yes** to allow users to change their account name, phone number, or email address. Otherwise, select **No**.

Minimum account password length
Specify the minimum number of characters allowed for all user passwords. The minumum value must be 8 or more characters.

Maximum account password length
Specify the maximum number of characters allowed for all user passwords. The maximum value cannot exceed 24 characters.

Number of Days before Password Expires
Specify the number of days that a password can be valid. The default value is 90 days. A Reset Password page is displayed in Storefront Commerce when the password expires.

Password Expiration Check Begin Date
Click **select date** to select a start date for password exipirations. Accounts that were created before this date do not expire. Select **01/01/2000** to validate expiration dates for all account passwords.

Enable successful login activity tracking
Select this option to track account activity, such as login, logout, and time-out. You can review activities using the Activity Log option. See "Activity log" on page 93. Clear this option if you do not want to track account activity.

Enable invalid login activity tracking
Select this option to track invalid login attempts. After a specified number of invalid attempts, a user can be prevented from logging in. If you select this option, you must specify values in the **Number of login attempts before account locks**, **How long to lock the account for**, and **What period**

of time do the failed attempts need to happen in to lock the account fields. Clear this option to prevent tracking of invalid login attempts.

Show multiple user logged in warning
Select this option to warn Storefront Commerce users when another user is already logged in with their credentials.

Number of login attempts before account locks
If you are tracking invalid login attempts, type a number between **1** and **9** to indicate the number of times a user can try to log in before the account is locked. The user must either wait the amount of time specified in the **How long to lock the account for** field or request that the account be unlocked by a system administrator.

How long to lock the account for
If you are tracking invalid login attempts, specify the number of minutes, hours, or days that the account will be locked and then select **Minutes**, **Hours**, or **Days** to indicate the value.

What period of time do the failed attempts need to happen in to lock the account
If you are tracking invalid login attempts, specify the period of time in which multiple invalid login attempts must occur for the account to be locked. For example, assume you specify **3 Minutes** in this field and **3** in the **Number of login attempts before account locks** field. If the user makes three invalid attempts within three minutes, the account is locked. If the user makes two attempts within three minutes and another attempt five minutes later, the account is not locked. Specify the number of minutes, hours, or days in which invalid attempts must occur and then select **Minutes**, **Hours**, or **Days** to indicate the value.

Allow Tree Navigation
Select **Yes** to display the catalog browse pages with the tree navigation. Otherwise, select **No**.

Browse Display Type*
Select the layout to use for catalog browse pages. **Image Display** shows a grid of images on browse pages. The category or subcategory image is shown as a link to either another category page or a list of items in the category or subcategory. **Tree Display** shows an expandable tree of categories on browse pages. **Image and Tree Display** shows both the grid of images and the category tree.

Note: If you select **Image Display** or **Image and Tree**, the number of images and category links shown on browse pages is based on the setting in the **Number of categories per row for Image browse type** and the **Maximum number of subcategories/attributes displayed for Image browse type** fields.

Show Subcategories
Specify **Yes** to display the sub-categories in the center column when a user selects the item category in Storefront Commerce. Specify **No** to hide the sub-categories.

Preserve User selections during the Shopping Session
If the sub-categories are shown in the center column in Storefront Commerce, a user can select to hide or display them. Specify **Yes** to preserve the user's selections during a shopping session. Select **No** to discard the user's selections during a shopping session, or to display or hide attributes.

Category Image Display Type
Select the layout to use for catalog images. Select **Fixed** to display the image. Select **Dynamic** to display both images and items.

Number of categories per row for Image browse type
Specify the number of categories per row to display for the Image Display browse type. This value is used only if **Image Display** is selected in the **Browse Display Type** field.

Maximum number of sub-categories displayed for Image browse type
Specify the number of subcategory links to display beneath a category or subcategory image. If there are more subcategories than the maximum number you specify here, a More link is displayed to indicate there are additional subcategories. Clicking More displays a browse page for the entire list of the subcategories. This value is used only if **Image Display** or **Image and Tree** is selected in the **Browse Display Type** field.

Maximum number of attributes displayed for Image browse type
Specify the number of attribute links to display beneath a category or subcategory image. If there are more attributes than the maximum number you specify here, a More link is displayed to indicate there are additional attributes. Clicking More displays a browse page for the entire list of the attributes. This value is used only if **Image Display** or **Image and Tree** is selected in the **Browse Display Type** field.

Display categories with items
Select **Yes** to display the category with the item. Otherwise, select **No**.

Allow users to view their user session information panel*
Select **Yes** to display a User Session information panel for B2B, B2B Ship To Group, B2B Corporate Group, B2C Registered, and CSR Account users. The panel cannot be displayed for B2C Anonymous or Customer Inquiry users. The panel shows appropriate user-related information, such as user name, customer number, warehouse, shipping address, pick-up location, and phone number. Otherwise, select **No**.

Display customer item numbers on Wish List menu* (B2B Only)
Select **Yes** to display the customer item number for items on the Wish list in Storefront Commerce. If no customer item number is available, then the item number is displayed. Otherwise, select **No**.

Order Confirmation Document Layout* (B2B Only)
Select the document layout to use for information provided in the order confirmation PDF file, the printable version or email attachment. The documents available in this list are defined in the **Documents Layout** option. See "Working with document layouts" on page 89.

If you select a document layout, PDF files are generated in your appserver directory. If the PDF file fails to generate, it remains in this directory until you delete it.

Document Image Directory (B2B Only)
If you included an image when you created your document layout, provide the image path here as a URL or UNC path. The path must include the file name. For example:

```
<Tomcat install Dir>\webapps\storefrontContent\attach\infor.png
```

The recommended size for the image is approximately 200 x 100. An image is included in the document layout if **Image** is listed in the **Included Sections** box for a document layout. See "Creating document layouts" on page 89.

Default line item print option* (B2B Only)
When Storefront Commerce users view the shopping cart, they can type a comment for any line item and then select where to print that comment based on your selection here. Your options are to allow line item printing on all documents, no documents, the pick list, or the invoice.

Keep Commerce Session Alive
Select **Yes** to eliminate session timeouts in Storefront Commerce. Select **No** and the commerce sessions will expire based on the system option.

Keep Alive Ping Frequency (minutes):
If you specify **Yes** for the **Keep Commerce Session Alive** field, you can specify the ping frequency. The default value is **25** minutes.

Google Analytics Tracking Code
If you registered your company with Google Analytics to track what a customer selects within Storefront Commerce, specify the tracking code that you received from Google Analytics. See the Google website for information on Google Analytics.

For search options:

Storefront Server Host
Specify the name of the computer hosting Storefront.

Storefront Server Port
Specify the port number of the computer hosting Storefront.

EasyAsk Server Host
Specify the name of the machine hosting EasyAsk.

EasyAsk Server Port
Specify the number of the port that should be used to access EasyAsk.

EasyAsk Dictionary
For each of the languages that you want to support, specify the associated EasyAsk dictionary files. Specify the name of the dictionary as `dictionary_language_locale.dxp`. Separate each filename in the list with a comma (,) semicolon (;) or space.

For example, to use the dictionary file in which French is the language and Canada is the locale, specify `storefront_fr_CA.dxp`. To use the dictionary file in which English is the language and United States is the locale, specify `storefront_en_US.dxp`.

Offer Search Suggestions
Select **Yes** to enable incremental search functionality when searching by keyword for an item in Storefront Commerce.

Incremental search, or search as you type, is a user interface interaction method to progressively search for and filter through text. As you type your text, one or more possible matches for the text are found and immediately presented.

Keyword search setting*
Use this setting to control the behavior of the keyword search function in Storefront Commerce.

Select **Text Search** to provide a simple search that finds whole keywords in the item number, description, or other default fields. For example, if a shopper searches on **run**, these items are displayed:

- **RUN-3000 – Running Shoes**

- **SHRT-1200 – Run for Fun T-Shirt**

Select **And Item** to provide a search that finds the common results of a simple search and an item-number-begins-with search. In this case, if a shopper searches on "run," the system would return only**RUN-3000 – Running Shoes**, because it fits both the text and item-number-begins-with search criteria. **SHRT-1200 – Run for Fun T-Shirt**would not be included in the results, because its item number does not begin with run.

Select **Or Item** to provide a search that combines the results of a simple text search and an item-number-begins-with search. In this case, if a shopper searches on **run**, the system would return these items:

- **RUN-3000 – Running Shoes**
- **RUNSCAPE – Online Adventure Game**
- **SHRT-1200 – Run for Fun T-Shirt**

This is a combination of the simple search results (**Run-3000** and **Run for Fun T-Shirt**) and the item-number-begins-with search results (**RUN-3000** and **RUNSCAPE**).

Number of banners to display
Specify the number of EasyAsk merchandising banners that can be displayed in Storefront Commerce.

Note: To display a banner in Storefront Commerce, you must save the banner file in this location: For Tomcat: `<TomcatContainerRoot>\storefrontCommerce\images\banners`. For WebSphere: `<WebSphereContainerRoot>\storefrontCommerce\images\banners`. Also, you must create an attribute in either Storefront Catalog or EasyAsk Studio if you have licensed the full version of EasyAsk Studio. The attribute should be named **banner**, and the banner file names should be used as the attribute values. For example, you could have `banner_screw.jpg` and `banner_nut.jpg` as banner files. You do not need to include the file path in the attribute value, only the file name. Finally, publish the catalog and generate the item index. Now, when a Storefront Commerce user searches for items that include these attribute values, Storefront Commerce chooses the banner associated with the most items and displays those banners at the top of the search results page.

Allow Customer Part Number Search
Select **No** if you do not use customer part numbers to improve the browse performance in Storefront Commerce. The default value is **Yes**.

For sales portal options:

Add Products URL
For Channel Sales, specify the URL to which to post the XML data when adding items to the cart.

Close Catalog URL
For Channel Sales after the post is completed, specify the URL to process the results and close the page.

For Product Configurator options:

Product Configurator Service URL
If you are using Infor Product Configurator, specify the URL for the location of the server that hosts the Product Configurator.

Product Configurator Application Names
Specify the Application Name as defined in Enterprise Manager.

Product Configurator Instance Name
Specify the Instance Name that you set up during the installation of the Configurator. This is the folder under `C:\inetpub\wwwroot\` where the instance of the Configurator is installed.

Product Configurator Namespace
Specify a name space if you are accessing a ruleset.

Product Configurator Profile Name
Specify a Profile Name. Profile names are used to associate different languages and views to groups of users. You can specify **Default**.

For punch out options:

Proceed to Checkout
This option is displayed if you are licensed to the Punchout option. Select **Yes** to have the user proceed to the checkout page where they can review their order total and any rounding of the quantities before they return to their website. Select **No** to end the session after the user clicks **Proceed to Checkout** on the cart page.

End Session after Order Request
This option is displayed if you are licensed to the Punchout option. Select **Yes** to end the user's session after an order request. Select **No** to keep the user's session active.

Email Sender on the Punchout Order
Select **Yes** to send a confirmation to the email specified at the account level as well as the email address sent from the supplier. Select **No** to only send a confirmation to the email specified at the account level.

XSL Path
If you selected to transmit via **XML**, an XSL file is used to transform the XML. This is the path to the XSL file. If the file exists in this path, it is used to generate the order CXML that is transferred to Ariba. The XSL file is extracted from the punchout connection assigned to that account.

For catalog options:

Catalog Name*
Select the catalog to use for this instance of Storefront. Catalogs are created in Storefront Catalog. See the *Infor Distribution Storefront Catalog User Guide* for more information.

Page Layout Group*
Select the page layout group to use for accounts in this instance of Storefront. Page layouts and layout groups are created in Storefront Catalog. See the *Infor Distribution Storefront Catalog User Guide* for more information.

Display Unit of Measure* (Line Item add section)
Select **Yes** to display the unit of measure field on the Order Pad and Line **Item Add** panel in Storefront Commerce. Select **No** to hide it.

Use Third Party Catalog Maintenance
This option is displayed if you integrate to a third party catalog maintenance product. Specify **Yes** to use a third party application to maintain Storefront catalog, category, and attribute objects. If you specify yes, the Storefront catalog is read only for catalog, category, and attribute objects. The

objects can be imported or exported to Storefront. Specify **No** to use Storefront Catalog to maintain catalog, category, and attribute objects.

For locale options:

Currency Locale
Select a default currency for use in Storefront Commerce. The default value is **English (United States)**. If imported items have missing or invalid currency information, this default value is used to replace the invalid value in Storefront Commerce.

Default Language*
Select a default language to use in Storefront Commerce. The default language should be one of the EasyAsk dictionary file languages that is set up in the **EasyAsk Dictionary** field.

Date Locale*
Select the locale for your dates. This setting controls the format in which dates can be specified and displayed in Storefront Commerce.

Note: An exception to this setting is the Saved Orders page in Storefront Commerce. Regardless of the date format setting specified here, the order date format on the Saved Orders page will remain in a yyyy-mm-dd format because of order sorting.

Select **Browser Locale** to use the locale set for a user's Internet browser. Select **Override Browser Locale** to override the locale set by the Internet browser with a locale that you choose. When you select this option, the **Override Browser Date Locale** field is displayed, so you can select the locale to use. Select **Override Date Format** to override the date format by specifying the date format. When you select this option, the **Override Date Format** field is displayed so that you can type the date format.

Override Date Format
This field is displayed if you select **Override Date Format** in the **Date Locale** field. Type the date format to use. All formats supported by internationalization (I18N) are allowed. Use these values to specify the format:

- Month, type `MM`
- Day, type `dd`
- Year, type `yy` for a two-digit year or `yyyy` for a four-digit year

For example, assume the date is **January 31, 2099**. If you type:

- **MM/dd/yyyy**, the date is displayed as **01/31/2099**
- **dd/MM/yyyy**, the date is displayed as **31/01/2099**
- **yyyy/MM/dd**, the date is displayed as **2099/01/31**

Note: Because the month, day, and year placeholder values are case-sensitive, be sure to type the placeholders as indicated. If you do not follow the formatting rules, zeros are displayed for that element of the date.

Allow multi-currency
If your company uses multiple currencies, select this check box. If you do not select this check box, API calls for multi-currency are not made.

Allow Product Restrictions

Select this check box if your company uses Item Product Restrictions and has products set up with a product restriction code in the ERP.

If you clear this check box, products set up with a product restriction code in the ERP are available in Storefront Commerce for ordering.

Show Restricted Products

The value in **Show Restricted Products** controls whether a restricted item is displayed.

Select this check box if **Allow Product Restrictions** is selected to display the restricted items in the Storefront Commerce Browse Search Results page. Items which are restricted are not displayed to the shopper in the catalog, specials list, shopping list or wish list if **Show Restricted Products** is not selected.

If a product restriction is updated while an item is in the shopping cart, the restricted item is removed from the shopping cart or checkout page. See"Restricting warehouse groups" on page 25.

If restricted items are displayed, they cannot be added to the shopping cart.

If you clear this check box, product restricted items are not displayed in Storefront Commerce. The category counts that are displayed in the left navigation pane may not be accurate because the product restriction occurs after the search is run.

For Multi Site Options:

Allow Multi Site
Select this option to allow fully qualified domain name qualifiers (FQDN) to be assigned to an account. Each FQDN is treated as a distinct entity and can be assigned a unique B2C Anonymous Account. This option allows you to maintain multiple Storefront domains that use the same backend. Additionally, this allows different branding, such as logo, page layout, browse, pricing, styling, and static text from the properties files, to be displayed.

Default Site
Specify a default site if you enable the Multi Site option.

3 Click **Update** to save your changes.

Restricting warehouse groups

When the default value for the warehouse on the customer or ship-to record in the ERP is **Inactive** or **Exclude from Storefront**, the warehouse is inactive in Storefront and the warehouse and warehouse products are not displayed in Storefront Commerce.

These conditions arise when a warehouse is restricted:

- If Storefront is set to B2C and B2B, the default warehouse for the B2C account must be active. If the default warehouse is inactive the user is redirected to another page and they cannot continue. This message is displayed:

```
The default warehouse is inactive. Contact your system administrator.
```

- The EasyAsk indexing process remains the same. Therefore, items from inactive warehouses can be displayed and are displayed in the EasyAsk Studio but are hidden in Storefront Commerce as the EasyAsk queries in Commerce filter them out.
- If the warehouse was marked as **Inactive** then it is displayed in a future retrieve process and the status is **Active**.
- If the ERP sends all of the empty warehouse records, regardless of the failure reason, all of the records in SQL are set to inactive. If this happens, you must use SQL to reset the records to active or re-import with warehouses as all active.
- The ERP requires the customer number, default warehouse, and company number to validate if the customer is active or inactive. If one or more of these conditions are not met, then the ERP does not return the customer record as a valid customer, and this message is displayed in Storefront:

  ```
  Your account's customer number is either invalid or inactive. Contact your
   system administrator.
  ```

  This message displays if the customer is inactive or if the default warehouse of the customer is inactive in the ERP.
- If a customer's default warehouse is active, but all of the ship-to default warehouses' are inactive, the user can browse and add items to the cart. However, if the user tries to change the shipping address, this message is displayed:

  ```
  No shipping addresses were found.
  ```

- When using Corporate Groups, these conditions apply:
  - If a customer's default warehouse is inactive or the customer is inactive, this message is displayed:

    ```
    The customer number cannot be selected. It must tie to a customer
    in the ERP system. Select a customer.
    ```

  - When all customers are inactive, this message is displayed:

    ```
    Your account's customer number is either invalid or inactive.
    Contact your system administrator.
    ```

  - Corporate group always goes to the customer selection page.
- Warehouse groups, alternate warehouses, shipping addresses, and pickup locations do not display inactive warehouses.
- When user tries to access a saved or a declined order, these conditions apply:
  - If the ordering warehouse is set to inactive, then the order is not displayed.
  - If the ordering warehouse is set to active but the line item warehouse is set to inactive, the item is removed from the order.
- These conditions apply for Releasing Quotes:
  - If the ordering warehouse is set to inactive, then the quote is not displayed.

    - If the ordering warehouse is set to active but the line item warehouse is set to inactive, the item is removed from the order.

- Browsing, promotions, alternates, order history, related products, compliments, Shopping, Wish, and Specials list items in inactive warehouses are not displayed.
- These conditions apply for Review Orders:
    - The inactive warehouse is removed from the search.
    - If you search for a quote or order number and the ordering warehouse is inactive, a message is displayed.
    - When doing a search orders where ordering warehouse is set to inactive, the warehouse is not displayed.
- When using ship-to groups, one or more of the assigned ship-to accounts must be active or the default warehouse must be active. Otherwise, this message id displayed:

```
To request assignment of shipping addresses to your ship-to group,
contact your system administrator. No shipping addresses were found.
```

- When copying an order or quote, items from an inactive warehouse are removed from the quote or order.

Enabling license keys

You must obtain license keys to integrate to these applications:

- Punchout

  See "Working with punchout websites" on page 99.
- Infor Product Configurator

Each integration has a separate key. However, if you have both integrations, you received a combination license key.

To enable license keys:

1. Select **System Administration > License Options**.
2. Specify this information:

   License ID
   Specify the license ID that you received from Infor Xtreme Support.

   License Key
   Specify the license key that you received from Infor Xtreme Support.

   Punchout
   Select this check box to enable the Punchout integration.

   Product Configuration Management
   Select this check box to enable the Infor Product Configurator integration.

3 To save your changes, click **Update**.

Setting up company options

Company options allow you to customize your product and its function for a particular company. Company options are associated with a single ERP company and apply to all Storefront activity associated with that company.

To set company options:

1. In the **System Administration** menu, click Company Options.
2. Click **Create**. The page refreshes and displays company option fields.
3. Specify this information:

   Note: Fields marked with an asterisk (*) in this topic can be overridden for an individual user at the account level.

   Company
   Specify the ERP company with which these options are associated.

   Web Hold Code for web orders*
   If all Web orders for this company must be placed on hold, select the hold code to assign to the orders.

   Review web order hold code*
   Specify the hold code to assign to orders for this company that must be reviewed. Web orders are marked for review if:

   - Credit card payment is provided
   - Shipping instructions are entered
   - You are using warehouse allocation

   For Product Configurator options:

   Product Configurator Service URL
   If you are using Infor Product Configurator, specify the URL for the location of the server that hosts the Product Configurator.

   Product Configurator Application Names
   Specify the Application Name as defined in Enterprise Manager.

   Product Configurator Instance Name
   Specify the Instance Name that you set up during the installation of the Configurator. This is the folder under `C:\inetpub\wwwroot\` where the instance of the Configurator is installed.

   Product Configurator Name Space
   Specify a name space if you are accessing a ruleset.

Product Configurator Profile Name
Specify a Profile Name. Profile names are used to associate different languages and views to groups of users. You can specify **Default**.

4 Click **Create**.

Editing company options

You can edit your company options to change the hold codes settings.

To edit company options:

1 Select **System Administration > Company Options**.
2 Click the name of the company to edit. The page refreshes and displays company options fields.
3 Make your selections. Click **Update** to save your changes. For field information, see "Setting up company options" on page 28.

Deleting company options

To delete options for a company:

1 In the **System Administration** menu, click Company Options.
2 Select the check box for each company's options to delete. Click **Select All** to select all companies.
3 Click **Delete**.

Note: You can also delete a selected company's options on the Company Options page by clicking **Delete**.

Creating administrative users

Administrative users are those authorized to log in to Storefront Administration and perform all administrative activities, such as setting system options, defining accounts, and maintaining the activity log.

To create administrative users:

1 In the **System Administration** menu, click Administrative Users.
2 Click **Create**.
3 Specify this information:

User ID
Specify the user ID for logging in to Storefront Administration.

User Name
Specify the user's first and last name.

Description
Optionally, you can provide a description to help identify the user.

Password
Specify the password for logging in to Storefront Administration.

Confirm Password
Specify the password again for logging in to Storefront Administration.

Receives Emails
Select this option if this administrative user should receive an email message each time someone submits an account request. Clear this option if this administrative user should not receive an e-mail message for account requests.

If this option is selected, the following additional fields are displayed:

Email
Specify the email address to which this administrative user's messages should be sent.

Email SMTP server
Specify the name or IP address of the SMTP server to which Storefront should connect to process this administrative user's e-mail messages.

Email SMTP from address
Specify the address of the e-mail account from which to send email messages.

Email SMTP user
Specify the ID of the user for the SMTP server. This user ID is used to log in to the server.

Email SMTP password
Specify the password for the SMTP user. This password is used to log in to the server.

4 Click **Create**.

Searching for administrative users

You can use search criteria to limit the list of administrative users that are displayed on the Administrative Users page.

To search for an administrative user:

1 In the **System Administration** menu, click Administrative Users.

2 Specify any of the following search criteria:

User ID
Specify all or part of a user ID.

User Name
Specify all or part of a user name.

User Description
Specify all or part of a user description.

3 Click **Search**. The page refreshes and displays a list of administrative users that match your search criteria.

Editing administrative users

To edit an administrative user:

1 In the **System Administration** menu, click Administrative Users.
2 Click the user ID of the user to edit.
3 Make the necessary edits, and then click **Update**.

Deleting administrative users

You can delete an individual or multiple users.

To delete an administrative user:

1 In the **System Administration** menu, click Administrative Users.
2 Select the check box next to each user to delete. To select all users, click **Select All**.
3 Click **Delete**.

Note: You also can delete a selected user on the Administrative User page by clicking **Delete**.

Using literals

Literals refer to the text that displays on Storefront application pages, such as field labels and messages. To support international variations in spelling and customization, you can modify the literals by editing the `application.properties` file for any or all of the applications. Each Storefront application (Storefront Administration, Storefront Commerce, and Storefront Catalog) has its own `application.properties` file for the application literals. This section provides the directory location of the `application.properties` file, instructions for modifying it, and an example segment of the file.

You can find the `application.properties` file in the following directory locations, depending on your Web application server:

Storefront Administration

- Tomcat

`[C]:\Tomcat version\webapps\storefrontAdmin\WEB-INF\classes\com\infor\storefront\ui\admin\resource`

- WebSphere

  `[C]:\Program Files\IBM\WebSphere\AppServer\AppSrv01\installedapps\servername\storefrontAdmin.ear\storefrontAdmin.war\WEB-INF\classes\com\infor\storefront\ui\admin\resource`

Storefront Commerce

- Tomcat

  `[C]:\Tomcat version\webapps\storefrontAdmin\WEB-INF\classes\com\infor\storefront\ui\commerce\resource`

- WebSphere

  `[C]:\Program Files\IBM\WebSphere\AppServer\AppSrv01\installedapps\servername\storefrontAdmin.ear\storefrontAdmin.war\WEB-INF\classes\com\infor\storefront\ui\commerce\resource`

Storefront Catalog

- Tomcat

  `[C]:\Tomcat version\webapps\storefrontAdmin\WEB-INF\classes\com\infor\storefront\ui\catalog\resource`

- WebSphere

  `[C]:\Program Files\IBM\WebSphere\AppServer\AppSrv01\installedapps\servername\storefrontAdmin.ear\storefrontAdmin.war\WEB-INF\classes\com\infor\storefront\ui\catalog\resource`

Editing the literals

To make changes to the text that displays in an application:

1. Browse to the `application.properties` file for the application to modify. See "Using literals" on page 31 for the file locations by application and Web application server.
2. Open the file with Notepad or a similar text editor.
3. Make your revisions. For example, if you are a UK English user, you may want to change **Inquiry** to **Enquiry** as in this example:

```
#Open Order Inquiry
commerce.openorder.total = Total Items Ordered
commerce.openorder.noorders=No Open Orders found.
commerce.openorder.openordinfo=Open Order Inquiry
commerce.openorder.cmp=Company
commerce.openorder.ordernumber=Order Number
```

```
commerce.openorder.ponumber=PO Number
commerce.openorder.requestshipdate=Requested Ship Date
commerce.openorder.wh=Warehouse
commerce.openorder.orderstatus=Status
commerce.openorder.qtyord=Quantity Ordered
commerce.openorder.extendedamt=Extended Amount
commerce.openorder.status.1=Ready for Pick Slip
commerce.openorder.status.2=Pick Slip Printed
commerce.openorder.status.3=Ready for Invoice
commerce.openorder.status.4=Invoice Printed
commerce.openorder.status.8=Canceled
commerce.openorder.status.9=Order Held
```

4 Save your changes.

5 Stop and restart your Web application server.

Customizing your online store

With Storefront, you have the option to perform various setup tasks to customize your application, so you can offer the features and functionality of your choice. These tasks can be performed in any order and are required only if you want to use the associated feature.

- Define pick-up locations: If you provide customers the option to pick up an order at a specific location, you can create the locations from which users can select. Pick-up locations can be used only with B2B accounts. See "Working with pick-up locations" on page 81.
- Define shipping URLs and make carrier assignments: If you want to provide the ability to track shipments while in transit with a carrier, you can define the URL and assign it to the appropriate carrier. See "Working with shipment tracking" on page 59.
- Create email documents: If you want to send an email message to confirm an order submission, you can create the text for the message. These documents are then assigned to accounts. See "Working with email documents" on page 85.

Setting up Storefront for use with multiple locales

4

In Storefront Administration, you specify the default language and date formatting in the Locale section in **System Options**. In the **Account Profiles** option, you can change date formatting at the account level.

When users sign into Storefront Commerce, if the locale in the browser is set to a language that Storefront does not support, the default locale that is set up in **System Options** is used. The currency that is displayed in the **Currency** field is filled from the Customer Information from your ERP system. The shopper can change the language and currency while shopping by using the fields on the Home page.

You can also translate user-defined data within Storefront Administration and Storefront Catalog. For more information, see "Translating Storefront Administration data" on page 36 and the *Infor Distribution Storefront Catalog User Guide*.

Understanding application properties files

For each of the supported languages, there is a language-specific application properties file. The file naming convention for the application properties is **application_<ll>_<rr>.properties** where **<ll>** is the language code and **<rr>** is the region code.

Examples:

- **application_fr_CA.properties**, where French is the language and Canada is the region
- **application_en_US.properties**, where English is the language and United States is the region

Translating Storefront Administration data

In Storefront Administration, you can translate the user-defined data for the supported languages, which are English, Spanish, French, German, and Italian. The translated text is displayed in Storefront Commerce based on the language that the user selects on the Home page in Storefront Commerce.

If you require multiple languages, you can specify translated text in the languages that you support on these pages:

- Account Options
- Account Profile Options
- Carrier Assignments
- System Options
- Shopping Lists
- Email documents

Adding or changing translated text

On pages where you can provide translated text, a Translation link in displayed at the top of the page.

To specify translated text:

1. Navigate to the page that includes text to translate.
2. Click Translation. the Translation Summary page shows the number of untranslated entries and the number of translated entries for each of the supported languages.
3. To specify translated text for untranslated entries, click Untranslated Entries next to the language to translate. To view or change text that has already been translated, click Translated Entries next to the language to translate. The translation details page is displayed.
4. For each field, specify the appropriate translated text.
5. For text that was not translated previously, click **Add Translation**; otherwise, click **Update Translation**.
6. Click Back to Summary.
7. Repeat this process until all entries that you require are translated.

Managing account users

5

An account identifies a user or group of users registered with your online store and authorized to make purchases. When you create an account, you assign the account to a company and a customer number, corporate group, or ship-to group. A user ID and password are provided for the account. The account user uses that ID and password to sign in and shop. For each account, you can control a specific set of information to limit or expand the features and functions available to the account users.

You can create as many accounts as necessary to handle the volume of customers you support, and then define the account options to control how the online store website will function for a particular account. After you have created accounts, you can view, edit, or delete account definitions.

Note: If you know you will be creating a large number of accounts with the same or very similar account information and options, you may want use the Copy User function, and set up account profiles to make account creation faster. See "Copying account users" on page 52 and "Working with account profiles" on page 55.

You also can create Customer Service Representative (CSR) accounts to allow ERP order entry users to order Storefront Commerce items for customers. The items displayed in Storefront Commerce do not all display on the ERP system, so the CSR account type gives users the ability to browse and search a standalone catalog, and add items to an order from that catalog.

Review these topics for more information:

Creating CSR accounts

You can create Customer Service Representative (CSR) accounts to give ERP order entry users the ability to add items to an order from the Storefront standalone catalog. This function is useful when items in Storefront Commerce cannot be ordered from the ERP system. CSRs can browse and search the standalone catalog to access the same items that online shoppers see, and add those items to an order.

To create a CSR account:

1. In the **System Administration** menu, click Accounts.
2. Click **Create CSR Account**.
3. Specify this information:

   User ID
   Specify the ID for the user. This user ID must match the user's ID in the ERP system.

   Password
   Specify the password for the user. This password must match the user's password in the ERP system.

   Customer Number
   Specify the number of the customer with which this user is associated.

   Company
   Specify the ERP company with which this user is associated.

   Catalog Name
   Specify the catalog to assign to this user.

   Page Layout Group
   Specify the page layout group to assign to this user.

4. Click **Create**.

Creating accounts

To create a Storefront account:

1. In the **System Administration** menu, click Accounts.
2. Click **Create**.
3. Specify this information:

   Account Type
   Select **Business-to-Business User** if this account is for a single B2B user linked to a specific customer by customer number on the ERP.

   Select **Business-to-Consumer Registered** if this account is for a registered B2C user.

   Select **Business-to-Consumer Anonymous** if this account is for a B2C guest user. This type of user is associated with a generic guest customer number on the ERP. You can create one guest account per company for all guest users to use. Shipping and billing information and shopping and wish lists cannot be saved for guest accounts.

Select **Customer Inquiry** if this account is for a B2B customer who will be able to only run inquiries, such as accounts receivable inquiries. No ordering functionality will be available to this type of account.

Select **Business-to-Business Ship To Group** if this account is for a ship-to group defined in Storefront. Ship-to accounts are linked to a specific ship-to group. Refer to "Creating ship-to groups" on page 77 for more information about assigning this type of account to a ship-to group.

Select **Business-to-Business Corporate Group** if this account is for a corporate group defined on the ERP. Corporate group accounts are linked to a specific corporate group.

Company
Select the ERP company with which this account is associated.

Customer Number
This field is displayed only if **Business-to-Business User**, **Business-to-Business Ship To Group**, or **Business-to-Consumer Anonymous** is selected in the **Account Type** field. Specify the number of the customer with which this account is associated.

Corporate Group
This field is displayed only if **Business-to-Business Corporate Group** is selected in the **Account Type** field, and will contain data only if a company is selected. Select the corporate group with which this account is associated.

Ship-to Group
This field is displayed only if **Business-to-Business Ship To Group** is selected in the **Account Type** field and a customer number has been entered. Select the ship-to group with which this account is associated.

Status
Select whether this account is a registered or unregistered account. Unregistered accounts cannot sign in to Storefront Commerce.

User ID
Specify the ID for the user. Users of this account use this ID to sign in to Storefront Commerce.

Password
Specify the password that this user uses to sign in.

Note: The field size of the **Password** field is determined by the **Minimum account password length** and **Maximum account password length** fields in **System Options**.

Password Reminder Question
Specify the question that the user of this account provided to secure their password if forgotten.

Password Reminder Answer
Specify the answer to the password reminder question.

Contact Name
Specify the name of the person to contact regarding this account.

Phone
Specify your phone number.

Email
Specify one or more email addresses for the contact person. Multiple addresses should be separated by a comma, semi-colon, or space.

The email address you enter here is used by default on the Storefront Commerce Checkout page. Shoppers can change the address at checkout.

bcc Email
Specify one or more blind carbon copy email addresses for the contact person. Multiple addresses should be separated by a comma, semi-colon, or space.

Site
Specify a default site for the account. This field is displayed only if you have enabled the Multi Site Option on System Controls.

Ship To
The Ship To address fields are displayed for only Business-to-Consumer Registered accounts.

Specify the address for the user's shipping location. To copy the shipping address into the billing address fields, click **Copy Shipping Address**.

Bill To
The Bill To address fields are displayed for only Business-to-Consumer Registered accounts.

Specify the address for the user's billing location.

Account Locked
Select **Yes** if this account is to be locked. Select **No** if this account is to be unlocked. Locked accounts cannot sign in to Storefront.

Note: If this account is for the B2C guest user, the account cannot be locked. Even if you select **Yes**, this account remains active.

Account Locked Until
Click **select date** to display a calendar from which you can select the date until which the account will be locked.

Account Password Last Update Date
Optionally, you can specify a begin date for confirming password expiration for this account. The current date is the default value when you create a new account. This field is updated when you reset your password in Storefront Commerce.

Leave this field blank and the current password will not expire. To clear the date, click **select date** and click **clear**.

Account Profile
You can optionally select a profile to assign to this account. This field is displayed only if you have set up account profiles for the company and account type specified for this account. See "Assigning and removing account profiles" on page 51.

4. Click **Create**. For account types other than Business-to-Consumer Registered accounts, the Account Options page is displayed so you can specify account settings. Business-to-Consumer Registered users use the options specified for the guest account (the Business-to-Consumer Anonymous user), so you do not have the ability to set account options for Business-to-Consumer registered users.
5. Perform one of these tasks:

- Assign options manually for only this account.

  To set options manually, specify the options you want for this account and then click **Update**. For more information about each option, refer to the field descriptions in "Setting account options" on page 43.

- Assign options manually and save as a new account profile.

  To set options manually, save them for this account, and also save them as an account profile to be used for other accounts, specify the options and then click **Save as Profile**. Your settings are saved for this account, and the Account Profile Options page is displayed. Specify a name and description for the profile and then click **Create**.

  Note: This new profile is not automatically assigned to this account. Updates to the profile will not affect this account. If you want changes to the new profile to also update this account, you must assign the profile to the account. See "Assigning an account profile to an existing account" on page 51.

- Assign options from an existing account profile.

  To automatically assign options that have already been set up in an account profile, click **Assign from Profile**. This option is available only if account profiles have been created for the company and account type of this account. Select the profile to assign and then click **Load**.

Note: Again, this function assigns profile options to the account but does not automatically assign the profile to the account. Updates to the profile will not affect this account. If you want changes to the profile to also update this account, you must assign the profile to the account. See "Assigning an account profile to an existing account" on page 51.

Creating accounts from account requests

You can use the information provided in the registration inquiry to create accounts from wholesale account requests.

To create an account from an account request:

1. In the **System Administration** menu, click Registration Inquiry.
2. Select the account request for which you want to create an account by clicking the link in the **Contact Name/Phone** column. The Request Account page is displayed with contact information specified by the requester.
3. Click **Create Account**.
4. Follow the instructions in "Creating accounts" on page 38 to complete the account. After account creation is complete, the account request is automatically removed from the registration inquiry.

Limiting the registration inquiry

Depending on the volume of account requests you receive, you may want to limit the inquiry when reviewing requests.

To limit the registration inquiry:

1. In the **System Administration** menu, click Registration Inquiry.
2. To limit the requests by date, use the (select date) link to select dates from the calendars.
3. Click **Search**. The page refreshes and displays registration requests received within your specified range.

Deleting registration requests

If a registration request does not provide complete information or cannot be used to create an account, you can delete it from the inquiry.

Note: Requests that are used to create accounts are removed from the inquiry after the account is created.

To delete a request:

1. In the **System Administration** menu, click Registration Inquiry.
2. Select the check box for each request to delete or click **Select All** to select all requests.
3. Click **Delete**.

Searching for accounts

You can use search criteria to limit the list of accounts that are displayed on the Accounts page.

To search for accounts:

1. In the **System Administration** menu, click **Accounts**.
2. Specify any of the following search criteria:

   Company Number
   Select the company number.

   Customer Number
   Specify all or part of a customer number.

   Corporate Group
   Select the corporate group. This field contains data only if you first select a company number.

   Customer Name
   Specify all or part of the customer's name.

Account Type
Select the account type.

User ID
Specify all or part of an account user ID.

Account Profile
Select the account profile.

Site
Select a Site. This field is only displayed if you have enabled the Multi Site Option in System Controls.

3 Click **Search**. The Accounts page refreshes and displays a list of accounts that match your search criteria.

Setting account options

With account options, you control Storefront Commerce functions for individual account users. For example, you can allow certain account users to change their password or shipping address and prevent other account users from doing so.

Some functions can be set to use the default system setting. By using the system setting, you can define that setting once at the system level and it will apply to all accounts, unless you use the account options to override the system setting for certain accounts. For example, suppose you allow customers to pick up orders at your warehouse location if they live within 30 miles of your location. You could set your system options to prevent pick-up locations from being shown. Accounts with shipping addresses more than 30 miles away from your location would have their account option set to **Default** for the **Display pickup locations** field, meaning that those accounts default to the system setting. However, for an account within 30 miles of your location, you can override the system level setting by selecting **Yes** in the **Display pickup locations** field for the account.

To set up account options:

1 In the **System Administration** menu, click Accounts.
2 Select an account by clicking the user ID link.
3 Click **Edit Account Options**.
4 Specify this information:

Note: Fields marked with a dagger (†) in this topic are those that affect Customer Inquiry account users. Fields marked with an asterisk (*) in this topic are not available for the Business-to-Consumer Anonymous account.

Email for Account Rep
Optionally, specify the email address of the CSR who is responsible for notifications from customers for a request to receive a copy of an invoice. After the request is received by the CSR, the CSR sends the customer the invoice using email. This is for B2B customers only.

Web Hold Code for web orders
Select the hold code to assign to the orders for this account. If you select a hold code, all orders for this account are placed on hold. If you do not select a hold code, the hold code selected for the company is used. See "Setting up company options" on page 28.

Review web order hold code
Specify the hold code to assign to orders that must be reviewed. Web orders are marked for review if:

- Credit card payment is provided
- Shipping instructions are entered
- Warehouse allocation is used

If you do not select a hold code, the hold code selected for the company is used. Refer to "Setting up company options" on page 28.

Inquiry Only
Select **Yes** if this account is for an inquiry-only user. In Storefront Commerce, inquiry-only users can review orders and browse the catalog and view item details, shopping lists, and specials. In addition, they can view this information: account summary, order history, saved orders, open invoices, paid invoices, open transactions. Inquiry-only users cannot add items to the cart, create and submit orders. Select **No** if this account is for a user who can create and submit orders.

Note: Be sure the page layout settings for the user match the level of functionality that is required.

Allow user to view their user session information panel†
Select **Yes** to display the User Session information panel in Storefront Commerce for this user. This panel shows appropriate user-related information, such as user name, customer number, warehouse, shipping address, pick-up location, and phone number. Select **No** to prevent the User Session information panel from being displayed. Select **Default** to use the system setting for this account.

Maintain budgets, spending limits and approvals† (B2B Only)
Use this setting to enable budget, spending limit, and approval functionality for this customer account and to make this account user a maintainer of the functionality.

When you select **Yes**, this user becomes a maintainer of budgets, spending limits, shopper accounts, and approvers for all account users of the customer. Also, if this is a B2B Corporate Group account, then all customers in the group may use this functionality, and this account user becomes a maintainer for all users of all customers in the group.

When this user signs in to Storefront Commerce, an Approvals panel is displayed with an option for accessing maintenance pages for the functionality.

Select **No** if this user should not maintain budget, spending limit, and approvals functionality.

Show accounts receivable information† (B2B Only)
Select **Yes** to display accounts receivable information, paid invoices, or open invoices online for this user. Select **No** to prevent display of accounts receivable information, paid invoices, or open invoices for this user.

Number of days of order status to retrieve† (B2B Only)
To limit the amount of data that is shown in the order status inquiry, specify the number of days for which to retrieve data.

Allow Invoice Payments
To allow this account user to make payments online, specify **Yes**; otherwise, specify **No**. This field is only available for these account types: **B2B User**, **B2C Anonymous**, **B2B Ship-To Group**, and **B2B Corporate Group**. If you specify **No**, Commerce users can view and search open invoices, but cannot pay invoices.

Maximum number of open invoices to retrieve† (B2B Only)
To limit the number of invoices shown in the open invoices inquiry, specify the maximum number of invoices to retrieve. Based on the other limiting criteria, up to the maximum number of invoices is retrieved when this user searches for open invoices. The default value is **1000**.

Maximum number of paid invoices to retrieve† (B2B Only)
To limit the number of invoices shown in the paid invoices inquiry, specify the maximum number of invoices to retrieve. Based on the other limiting criteria, up to the maximum number of invoices is retrieved when this user searches for paid invoices.

Number of days of paid invoices to retrieve from transaction date: (B2B Only)
To limit the amount of paid invoices that is shown in the paid invoices inquiry, specify the number of days for which to retrieve data.

Can user change password
Select **Yes** to allow this account user to change their password. Select **No** to prevent this account user from changing their password.

Allow the user to edit Contact Info† (B2B Only)
Select **Yes** to allow this account user to change their account name, phone number, or email address. Select **No** to prevent this account user from changing contact information. Select **Default** to use the system setting for this account.

Allow billing address to be modified*
Select **Yes** to allow this account user to change the billing address. Select **No** to prevent this account user from changing the billing address.

Allow shipping address to be modified*
Select **Yes** to allow this account user to change the shipping address. Select **No** to prevent this user from changing the shipping address. Select **Only from Alternate Shipping Address List** if this account user can change the shipping address only by selecting an alternate from a list of available addresses.

Synchronize shipping addresses at login*
Select **Yes** to have shipping addresses for this account refreshed with ERP data when the user signs in to Storefront Commerce. Select **No** to prevent shipping addresses from being refreshed. If an account has a large number of shipping addresses (for example, for customers of a corporate group account), you should consider setting this option to **No**.

Change Current Warehouse
Select **Yes** to allow this account user to change their current warehouse for searching and ordering. Select **No** to prevent the user from changing warehouse locations. Select **Default** to use the system setting for this account.

Allow Warehouse Default Ordering Unit Of Measure
Specify **Yes** to use the warehouse ordering unit of measure when you order an item. Specify **No** to use the default stocking unit of measure in Storefront Commerce when you order an item.

For example, item A250 has a stocking unit of measure of **CAS** and **BOX**. Warehouse 2 has the default ordering unit of measure as **EA**. If you specify **Yes**, the default unit of measure is **EA** but you can also select **CAS** or **BOX**.

Add Items advance to cart

Select **Yes** to display the shopping cart immediately after the shopper adds an item to the cart. Use this option if you want to display the shopping cart after each item for those shoppers who typically add a small number of items to their carts, for example, saved B2C shopping carts with less than 30 items. A cart validation is performed on all cart items each time an item is added to the cart. Because of the cart validation used for this option, the performance may be slower.

Select **No** to display the same page from which the shopper added the last item to the shopping cart. Use this option to maintain a natural flow and provide a faster shopping experience. Shoppers can continue shopping and adding items to their shopping carts from the same page where they selected the previous item. A cart validation is performed only when the shopper selects the **Cart** button. Because of the cart validation used for this option, the performance may be faster.

Note: This option refers to the **Add to Cart** button on the bottom of the screens when multiple items are ordered. This option does not apply to the **Add to Cart** link on the side of the screen that is used in multiple page layouts.

Display pickup locations (B2B Only)
Select **Yes** to allow this account user to view a list of locations where they can physically pick up an order. All created pick-up locations are shown. Refer to "Working with pick-up locations" on page 81. Select **No** to prevent pick-up locations from being displayed. Select **Default** to use the system setting for this account.

Allow the user to enter orders (B2B Only)
Select **Yes** to allow this account user to enter orders. Select **No** to prevent this account user from entering orders. Depending on your selection in the **Allow the user to enter quotes** field, the user can use Storefront Commerce to only view your product catalog and information.

Allow the user to enter quotes
Select **Yes** to allow this account user to enter quotes. Select **No** to prevent this account user from entering quotes. Depending on your selection in the **Allow the user to enter orders** field, the user can use Storefront Commerce to only view your product catalog and information. You can specify this information for B2B and B2C users.

Allow release quotes* (B2B Only)
Select **Yes** to allow this account to release quotes as orders. Select **No** to prevent this account from releasing quotes as orders.

Keyword search setting†
Use this setting to control the behavior of the keyword search function in Storefront Commerce for this account user. Select **Text Search** to provide a simple search that finds whole keywords in the item number, description, or other default fields. For example, if the user searches on **run**, these items are displayed:

- **RUN-3000 – Running Shoes**
- **SHRT-1200 – Run for Fun T-Shirt**

Select **And Item** to provide a search that finds the common results of a simple search and an item-number-begins-with search. In this case, if the user searches on **run**, the**RUN-3000 – Running Shoes** item only is displayed, because it fits both the text and item-number-begins-with search criteria. **SHRT-1200 – Run for Fun T-Shirt**would not be included in the results because its item number does not begin with **run**.

Select **Or Item** to provide a search that combines the results of a simple text search and an item-number-begins-with search. In this case, if the user searches on **run**, these items are displayed:

- **RUN-3000 – Running Shoes**
- **RUNSCAPE – Online Adventure Game**
- **SHRT-1200 – Run for Fun T-Shirt**

This is a combination of the simple search results (**Run-3000** and **Run for Fun T-Shirt**) and the item-number-begins-with search results (**RUN-3000** and **RUNSCAPE**).

Select **Default** to use the system setting for this account.

Email order confirmation
Select **Yes** to send order confirmations by e-mail to this account user. Select **No** to prevent order confirmations from being sent. Select **Default** to use the system setting for this account.

Note: Order confirmation messages are sent to the email address provided on the Storefront Commerce Checkout page, which defaults from the address defined during account creation. Shoppers can change the address at checkout.

Email Document
Select the document to send to the account when an order confirmation is sent by e-mail. The documents available in this list are those defined in the **Email Documents** option. Refer to "Working with email documents" on page 85.

Note: You must also select a document layout in the **Order Confirmation Document Layout** field to determine the information available in the PDF file attached to the e-mail document.

Display Unit of Measure (Line item add section)
Select **Yes** to display the unit of measure field on the Order Pad and Line Item Add panel for this account user. Select **No** to prevent display of the unit of measure field. Select **Default** to use the system setting for this account.

Note: Be sure the page layout settings for the user match the unit of measure setting.

Warehouse Group
Select a warehouse group to assign to this account. Warehouse groups must be set up before you can use this option. See "Working with warehouse groups" on page 73.

Method of calculating quantity available

Select **Default and alt warehouses** to use the quantity available in the account's default and alternate warehouses when calculating item quantity available.

Select **Default and whse group** to use the quantity available in the account's default warehouse and warehouse group when calculating item quantity available.

Note: You need to assign a warehouse group in order to use this option.

Select **Default whse only** to use the quantity available in only the account's default warehouse when calculating item quantity available.

Note: For B2B accounts, if the account user selects a pick-up location, quantity available is calculated for the pick-up location warehouse only.

Show quantity unavailable warnings
Select **Yes** to display a message for this account user when there is not enough quantity available to fill the order for an item. Select **No** to prevent the message from being displayed.

Show quantity only if available
Select **Yes** to display a message showing the item quantity available only if the value is greater than zero. A message is not displayed if the quantity available is equal to or less than zero. Select **No** to prevent displaying a message with both positive and negative quantity available values.

Display Stock amount in messages as
Select **Actual Values** to display available stock as the actual quantity available amount. Select **In Stock/Out of Stock Indicator** to display the text **In stock** when quantity is available and the text **Out of stock** when quantity is unavailable.

Note: Be sure the page layout settings for the user match the way in which stock will be displayed.

Payment type for orders for this account*
Select your payment types:

- Select **Credit card** if orders will require a credit card number for payment during check out.
- Select **On account** if order payment will be accepted on account.
- Select **ACH-Check** for use with CenPOS ACH-check payments.
- Select **Default** to use the system setting for this account.

The user can make a selection and provide the appropriate information on the Checkout page in Storefront Commerce.

Note: If this is a B2C account, be sure to select **Credit Card** as the payment type.

Default line item print option (B2B Only)
When Storefront Commerce users view the shopping cart, they can specify a comment for any line item and then select where to print that comment based on your selection here. Your options are to allow line item printing on all documents, no documents, the pick list, or the invoice. Select **Use System Default** to use the system setting for this account.

Display an end order message for this account
Select **Yes** to display an end order message when orders are submitted for this account. Select **No** to prevent display of an end order message. Select **Default** to use the system setting for this account.

End order message text
Specify the text to display when an order is submitted by this account. This text appears only if the **Display an end order message for this account** field is set to **Yes** or if the system default setting is set to **Yes** and is selected in the **Display an end order message for this account** field.

Alternate Out of stock message
Specify an alternate message to display for order as needed type of items, for example, **Order as Needed**.

Allow alternate carrier
Select **Yes** if alternate carrier selection is available for this account. Select **No** if alternate carrier selection is not available for this account. Select **Default** to use the system setting for this account.

Include Freight on Orders
Select **Yes** to display freight charges on the Checkout page in Storefront Commerce. If you select **Yes**, you must set up freight data in your ERP system. Select **No** to prevent display of freight charges. Select **Default** to use the system setting for this account.

Allow rate shopping
Select **Yes** to display shipping rates in Storefront Commerce. The rates are displayed next to available carrier names in the **Shipping Method** field on the Checkout page. Select **No** to prevent displaying shipping rates. Select **Default** to use the system setting for this account. This option is available only if you have set the **Allow alternate carrier** and **Include Freight on Orders** options to **Yes**.

Allow Tree Navigation
Select **Yes** to display the catalog browse pages with the tree navigation. Otherwise, select **No**.

Browse Display Type
Select the layout to use for catalog browse pages. Select **Image Display** to display a grid of images on browse pages. The category or subcategory image is shown as a link to either another category page or a list of items in the category or subcategory. Select **Tree Display** to display an expandable tree of categories on browse pages. Select **Image and Tree Display** to display both the grid of images and the category tree. Select **Default** to use the system setting for this account.

Note: If you select **Image Display** or **Image and Tree**, the number of images and subcategory links shown on browse pages is based on the setting in the **Number of categories per row for Image browse type** and the **Maximum number of subcategories/attributes displayed for Image browse type** fields in the system options.

Show Subcategories
Specify **Yes** to display the sub-categories in the center column when a user selects the item category in Storefront Commerce. Specify **No** to hide the sub-categories.

Preserve User selections during the Shopping Session
If the sub-categories are shown in the center column in Storefront Commerce, a user can select to hide or display them. Specify **Yes** to preserver the user's selections during a shopping session. Select **No** to discard the user's selections during a shopping session. This also applies to whether to display or hide attributes.

Display categories with items
Select **Yes** to display the category with the item. Select **No** to prevent display of the category.

Home Page
Select the page that functions as the home page for this account when the account user signs in to Storefront Commerce.

The selections available in this field are based on the user's account type. For most B2B and B2C account types, you can select from the following home pages:

- Welcome
- Browse
- Custom Page

- Search
- Specials

For corporate group accounts, an additional Corporate Group home page selection is provided. This takes users to the Corporate Group Customers page, which lists customers assigned to the account.

Display customer item numbers on Wish List menu† (B2B Only)
Select **Yes** to display the customer item number for items on the Wish list in Storefront Commerce. If no customer item number is available, then the item number is displayed. Select **No** to prevent display of the customer item number for items on the Wish list. Select **Default** to use the system setting for this account.

Order Confirmation Document Layout (B2B Only)
Select the document layout to use for information provided in the order confirmation PDF file, the printable version or email attachment, for this account. Documents available in this list are defined in the **Documents Layout** option. See "Working with document layouts" on page 89. Select **Default** to use the system setting for this account.

Catalog Name†
Select the name of the catalog for this account user. Catalogs are created in Storefront Catalog. Refer to the *Infor Distribution Storefront Catalog User Guide* for more information.

Page Layout Group
Select the page layout group that controls how the Storefront Commerce pages are displayed for this account. Page layouts and page layout groups are created in Storefront Catalog. Refer to the *Infor Distribution Storefront Catalog User Guide* for more information.

Date Locale
Select the locale to use for dates. This setting controls the format in which dates can be entered and displayed in Storefront Commerce.

Select **Default** to use the system setting for this account. Select **Browser Locale** to use the locale set for the user's Internet browser. Select **Override Browser Locale** to override the locale set by the Internet browser with a locale that you choose. When you select this option, the **Override Browser Date Locale** field is displayed, so you can select the locale to use.

Override Browser Date Locale
This field is available if you select **Override Browser Locale** in the **Date Locale** field. Select the override locale to use.

Punchout Connection:
This option is displayed if you are licensed to the Punchout option. Select the type of Punchout connection.

Proceed to Checkout
This option is displayed if you are licensed to the Punchout option. Select **Yes** to have the user proceed to the checkout page where they can review their order total and any rounding of the quantities before they return to their website.. Select **No** to end the session after the user clicks **Proceed to Checkout** on the cart page.

End Session after Order Request
This option is displayed if you are licensed to the Punchout option. Select **Yes** to end the user's session after an order request. Select **No** to keep the user's session active.

XSL Path
This option is displayed if you are licensed to the Punchout option. If you selected to transmit via **XML**, an XSL file is used to transform the XML. This is the path to the XSL file. If the file exists in this path, it is used to generate the order CXML that is transferred to Ariba. The XSL file is extracted from the punchout connection assigned to that account.

Punchout ERROR Email Document
This option is displayed if you are licensed to the Punchout option.

Select the document to send by email when an Punchout error log is sent. The documents available in this list are those created using the **Email Documents** option. See "Creating email documents" on page 85. You must also select a document layout in the **Order Confirmation Document Layout** field to determine the information available in the PDF attached to the email message.

5 Click **Update** to save the account settings.

Note: You must click **Update** to save the settings, even if you want to save the default settings without making changes.

Assigning and removing account profiles

The "Creating accounts" on page 38 topic describes how to assign account profiles to new accounts. Using the Accounts page, you also can assign account profiles to one or more existing accounts, and you can remove profiles from accounts.

Review these topics for more information:

- "Assigning an account profile to an existing account" on page 51
- "Assigning an account profile to multiple accounts" on page 52
- "Removing account profiles from accounts" on page 52

Assigning an account profile to an existing account

To assign an account profile to an existing account, you must already have created the profile, either by saving a new account's options as a profile as described in step 5 of "Creating accounts" on page 38, or by using the Create function on the Account Profiles page as described in "Creating account profiles" on page 55.

To assign an account profile to an existing account:

1 In the **System Administration** menu, click Accounts.
2 Select an account by clicking the user ID link.
3 At the bottom of the page, select a profile to assign to this account.

Note: The**Account Profile** field is displayed only if account profiles have been created for the company and account type of the selected account.

4 Click **Assign Profile**.

Assigning an account profile to multiple accounts

If you have created one or more account profiles for a particular company and account type combination, you can perform a search for all accounts of that combination, select multiple accounts, and assign a profile.

Note: A company and account type must be provided before you can use the **Assign Profile** option. This option becomes available for use on the Accounts page after a search on the company number and account type combination has been performed.

To assign an account profile to multiple accounts:

1. In the **System Administration** menu, click Accounts.
2. Provide search criteria for **Company Number** and **Account Type**.
3. Click **Search**. The Accounts page refreshes and displays the accounts that match your search criteria. At the bottom of the page, a drop-down list of all available account profiles is provided.
4. Select the check box of each account to which you want to assign a profile.
5. Select the profile to assign to these accounts and then click **Assign Profile**.

Removing account profiles from accounts

To remove an account profile from an account:

1. In the **System Administration** menu, click Accounts.
2. Select an account by clicking the user ID link.
3. Click **Remove Profile**.

Copying account users

To save time when creating account users that are to have the same or very similar account settings, Storefront provides the **Copy User** option. This option copies all account information and options from a selected user except for the user ID and password information.

To copy an account user:

1. In the **System Administration** menu, click Accounts.
2. Click the user ID link of the account information to copy.
3. Click **Copy User**.
4. Specify a user ID and password information and then click **Create**.

Refreshing account information from the ERP

Whenever necessary, you can retrieve current customer and ship-to information from the ERP for a user account.

To refresh customer information:

1 In the **System Administration** menu, click Accounts.
2 Click the user ID link of the account to refresh.
3 Click **Refresh Customer Info**. The page refreshes when the update is complete. If the account has a large volume of ship-to addresses, this update may take some time.

Editing accounts

You can edit an account to change the account information or the account options.

To edit an account:

1 In the **System Administration** menu, click Accounts.
2 Click the user ID link of the account to edit.

   Note: To edit the account options for Business-to-Consumer Registered accounts, you must edit the options for the Business-to-Consumer Anonymous account.

3 Make changes to the account information. For field information, see "Creating CSR accounts" on page 38 and "Creating accounts" on page 38.

   Note: To change corporate group information for a corporate group account, the account must have a status of unregistered.

4 Click **Update**.
5 To make changes to the account options, click **Edit Account Options**. For field information, see "Setting account options" on page 43. If an account profile is assigned to this account, you can edit the account profile to update this account and all others with the same profile. If you edit just this account, the account profile is not changed.
6 Click **Update**.

Deleting accounts

You can delete an individual account or multiple accounts. You can delete accounts whether they are registered or unregistered. Deleting a registered account does not affect any orders that have been submitted by the account user, but once the account is deleted, the user can no longer sign in to Storefront Commerce. When an account is deleted, shopping lists and specials lists that are assigned to that account only (and no other accounts) are deleted with the account. To prevent the deletion of the list, you must clear the account assignment before deleting the account.

To delete an account:

1 In the **System Administration** menu, click Accounts.
2 Select the check box of each account to delete. Click **Select All** to select all accounts.
3 Click **Delete**.

   Note: You can also delete a selected account on its Account page by clicking **Delete**.

Exporting data

You can export account information to a `.csv` file by selecting the Export Data menu option. These fields are included in the download:

- User Name
- Account Type
- Contact Name
- Email Address
- Phone Number
- Extension

1 Select **Administation > Export Data**.
2 Select an option to determine the accounts that are exported:
   - B2C Users
   - B2B Users
   - B2C and B2B Users
3 Click **Export**.

Working with account profiles

6

To save time when setting up large numbers of users who are to have the same or very similar account options, Storefront provides account profiles. With account profiles, you can set up a template of account options one time, and then assign the template to new and existing accounts.

There is no limit to the number of account profiles you can use in Storefront. You can create new account profiles or save existing accounts' options as profiles. You also can update profiles whenever required, and the changes are applied to all assigned accounts automatically.

Finally, you can easily remove a profile from one or more accounts, and you can delete profiles that are no longer assigned to accounts.

Review these topics for more information:

- "Creating account profiles" on page 55
- "Editing account profiles" on page 56
- "Deleting account profiles" on page 57

Creating account profiles

This task describes creating an account profile using the Account Profile page. You also can create an account profile from the Account page by saving an individual account's options as an account profile. See "Creating accounts" on page 38.

To create an account profile:

1. In the **System Administration** menu, click Account Profiles.
2. Click **Create**.
3. Specify this information:

   Company
   Select the ERP company with which accounts assigned to this profile will be associated.

   Account Type
   Select **Business-to-Business User** if the accounts assigned to this profile will be for B2B users linked to a specific customer by customer number on the ERP.

Select **Business-to-Consumer Registered** if the accounts assigned to this profile will be for registered B2C users.

Select **Customer Inquiry** if the accounts assigned to this profile will be for B2B customers who can only run inquiries, for example, to check accounts receivable. No ordering functionality will be available to this type of account.

Select **Business-to-Business Ship To Group** if the accounts assigned to this profile will be for ship-to groups defined in Storefront. Ship-to accounts are linked to a specific ship-to group.

Select **Business-to-Business Corporate Group** if the accounts assigned to this profile will be for corporate groups defined on the ERP. Corporate group accounts are linked to a specific corporate group.

Note: There is no option for **Business-to-Consumer Anonymous**, because you can create only one guest user account in your system, and account profiles are intended for use when you must set up many users of the same company and account type.

Account Profile Name
Specify a name for the account profile.

Description
Specify a description for the account profile.

4 Click **Create**. The Account Profile Options page is displayed so you can specify account option settings.
5 Specify the options you want for this account profile and then click **Update**. For more information about each option, refer to the field descriptions in "Setting account options" on page 43.

You can now assign this account profile to new and existing accounts. See step 5 in "Creating accounts" on page 38 and "Assigning an account profile to an existing account" on page 51.

Editing account profiles

After you create an account profile record, you can edit its options. Accounts to which the profile has been assigned are updated automatically.

Note: You can assign profile options to an account without assigning the profile to the account. This is useful if you want to be able to quickly assign options to an account but prevent changes to the account when the profile is updated. For more information, see step 5 in "Creating accounts" on page 38.

To edit an account profile:

1 In the **System Administration** menu, click Account Profiles.
2 Select an account profile by clicking the profile name.
3 Make required changes to the profile options. For more information about each option, refer to the field descriptions in "Setting account options" on page 43.
4 Click **Update**.

Deleting account profiles

You can delete account profiles as long as no accounts are currently assigned to them. If accounts are assigned, you must remove the account assignments and then delete the account profiles. See "Removing account profiles from accounts" on page 52.

Note: You can see how many accounts are assigned to an account profile in the Accounts Assigned column on the Account Profiles page.

When an account profile is deleted, any accounts that had been assigned to that profile do not lose their account options settings. The options remain the same until you edit them or assign a different profile to the account.

To delete an account profile:

1. In the **System Administration** menu, click Account Profiles.
2. Select the check box of each account profile to delete. Click **Select All** to select all account profiles.
3. Click **Delete**.

   Note: You can also delete a selected account profile on its Account Profile Options page by clicking **Delete**.

Working with shipment tracking

7

Use Storefront to track shipped orders through the website of the shipment carrier.

Review these topics for more information:

- "Enabling shipment tracking" on page 59
- "Creating shipping URLs" on page 59
- "Creating carrier assignments" on page 61

Enabling shipment tracking

To enable shipment tracking for your online store users:

1 Run a data retrieve to retrieve all of the carrier codes that you have defined on the ERP application. See "Retrieving data" on page 13.

2 Obtain and provide URLs for shippers you use. See "Creating shipping URLs" on page 59.

3 Assign the shipper and URLs to your carrier codes. See "Creating carrier assignments" on page 61.

   After the setup of shipping URLs is complete, the tracking number link for a parcel is displayed in the Order Inquiry details of a customer's order. The link opens the carrier's website in a new browser window and displays the carrier's page for the tracking number.

   The shipment tracking capabilities you can offer your customers vary based on your ERP system configuration. The integration method used to communicate between your ERP and Storefront has been configured to pass the tracking information from the ERP if it is available.

Creating shipping URLs

You can create as many shipping URLs as necessary to allow shipment tracking for your carriers.

To create a shipping URL:

1 In the **System Administration** menu, click Shipping URLs.

2 Click **Create**.
3 Specify this information:

Description
Specify descriptive text to identify the carrier with which this URL is associated.

URL
Specify the URL address for the shipment tracking page of the shipper. You must type `%1` (one) as a place holder for the tracking number in the URL. The `%1` is not part of the address; it is a place holder for the tracking number of the order. When the customer clicks to track their order shipment, `%1` is replaced with the tracking number.

For example, `http://www.myshipper.com/cgi-bin/Trace?ShipmentNumber1=%1`

4 Click **Create**. The page refreshes and displays a message indicating that the URL was added successfully.

Editing shipping URLs

To edit a shipping URL:

1 In the **System Administration** menu, click Shipping URLs.
2 Click the description of the URL to change.
3 Make changes to the URL and then click **Update**.

Note: To change the description of the shipping URL, you must delete the record and create a new one.

Deleting shipping URLs

You can delete an individual or multiple URLs.

To delete a shipping URL:

1 In the **System Administration** menu, click Shipping URLs.
2 Select the check box of the each shipping URL to delete. Click **Select All** to select all URLs.
3 Click **Delete**.

Note: You can also delete a selected URL on its Shipping URL page by clicking **Delete**.

Creating carrier assignments

After you have retrieved your carrier codes from the ERP and defined your shipping URLs, you can create the relationship between the carrier code and the URL.

To create a carrier assignment:

1. In the **System Administration** menu, click Carrier Assignments.
2. Click the carrier code of the carrier for whom you want to make an assignment.
3. Specify this information:

   Prevent from Displaying
   Select **Yes** to prevent the carrier from being displayed as a selection in Storefront Commerce. Select **No** to allow this carrier to be displayed as a selection in Storefront Commerce. Carriers set to **No** are displayed as selections in the **Shipping Method** list during checkout.

   Shipper URL Selection
   Select the shipping URL you want to associate with the carrier.

4. Click **Update**. The page refreshes and displays a message indicating that the update was successful.

Searching for carrier assignments

You can use search criteria to limit the list of carrier assignments that appear on the Carrier Assignments page.

To search for carrier assignments:

1. In the **System Administration** menu, click Carrier Assignments.
2. Specify any of the following search criteria:

   Company
   Select the company number.

   Company Name
   Specify all or part of a company name.

   Carrier Code
   Specify all or part of the carrier code.

   Carrier Code Description
   Specify all or part of the carrier code description.

3. Click **Search**. The page refreshes and displays a list of carrier codes that match your search criteria.

Editing carrier assignments

To edit a carrier assignment:

1 In the **System Administration** menu, click Carrier Assignments.
2 Click the carrier code of the carrier assignment to change.
3 On the Carrier Assignment page, **URL Assigned** displays the current assignment. Use **Shipper URL Selection** to change the assignment and then click **Update**.

Removing carrier assignments

To remove a carrier assignment:

1 In the **System Administration** menu, click Carrier Assignments.
2 Select the check box of each assignment to delete. Use **Select All** to select all of the assignments.
3 Click **Remove URL Assignments**.

Note: You can also remove a selected assignment on the Carrier Assignment page by selecting **No URL Assignment** in **Shipper URL Selection**.

Working with specials lists

8

Specials lists can be created to highlight items marked down for a special sale. You can create as many specials lists as necessary for your different consumer markets or interests. And you can add as many items as you like to the list and control the order in which items are listed.

Review these topics for more information:

- "Creating specials lists" on page 63
- "Adding items to specials lists" on page 64
- "Resequencing items in specials lists" on page 65
- "Assigning accounts to specials lists" on page 65

Creating specials lists

To create a specials list:

1. In the **System Administration** menu, click Specials Lists.
2. Click **Create**. The page refreshes and displays fields for defining the list.
3. Specify this information:

   List Name
   Specify the name of the list.

   Company
   Select the company for which the list is being created.

   List Description
   Specify descriptive text to identify the list.

   System List
   Select this check box if this is a system-level list, which is assigned to all account users of the selected company.

4. Click **Create**. The page refreshes and displays a message indicating that list has been created successfully. You can now add items to the list.

Adding items to specials lists

There are two ways to add items to a specials list. If you know item numbers, you can add items one at a time by specifying the item number. If you need to search for the items or you want to add a group of items all at once, you can use the Add Items link on the Specials List page to search for, select, and add items to the list.

Adding an item by item number

1. If you have just created a specials list and the record is still open, start at step 3. Otherwise, in the **System Administration** menu, click Specials Lists.
2. Select the list to work with. You can search to limit the lists shown. Specify all or part of the list name or description and then click **Search**.
3. In the **Item Number** field, specify an item number and then click **Add**. The page refreshes to include the item in the list.
4. Repeat step 3 as needed.

Adding items by searching

1. If you have just created a specials list and the record is still open, start at step 3. Otherwise, in the **System Administration** menu, click Specials Lists.
2. Select the list to work with.
3. Click **Add Items**. The Item Search page is displayed.
4. Specify any of the following search criteria:

   Note: To display all items, leave search criteria fields empty and then click **Search**.

   Item Number
   Specify all or part of the item number.

   Item Product Description
   Specify all or part of the description.

   Catalog
   Select the catalog name.

   Item Class/Item Sub Class
   Select an item class or an item class and sub-class combination. After you select the item class, the page refreshes and the drop-down list for the sub-classes is displayed.

   Item GL Code
   Select an item GL code.

   Item Price Class
   Select the price class.

Product Restriction
Specify **All**, **Restriction allowed**, or **Restriction not allowed**.

5 Click **Search**.
6 In the search results, select the check boxes of the items to add to the specials list and then click **Add**. You are returned to the Specials List page with the selected items included in the list.

Removing items from specials lists

To remove items from a specials list:

1 If you have just created a specials list and the record is still open, start at step 3. Otherwise, in the **System Administration** menu, click Specials Lists.
2 Select the list to work with. You can search to limit the lists shown. Specify all or part of the list name or description and then click **Search**.
3 Select the check boxes next to the items to remove and then click **Delete**.

Resequencing items in specials lists

Sequence numbers determine the order in which items are displayed on a specials list. If a specials list has multiple items, you can change the order in which they are listed. By default, item sequence numbers are incremented by ten as items are added.

To resequence items on a specials list:

1 If you have just added items to a specials list and the record is still open, start at step 3. Otherwise, in the **System Administration** menu, click Specials Lists.
2 Select the list to work with. You can search to limit the lists shown. Specify all or part of the list name or description and then click **Search**.
3 Click Resequence Items.
4 Specify the new sequence numbers for the items.
5 Click **Resequence**. You are returned to the Specials List page with items in the new order.

Assigning accounts to specials lists

When you are satisfied with your specials list, you can assign it to accounts. Assigning the list to accounts makes the list available to those accounts when they are shopping. System-level lists are available for all accounts of a selected company and do not need to be assigned.

Note: Once you assign accounts to a list, you cannot make it a system list unless you remove the account assignments.

To assign accounts to a specials list:

1 If you have just created a specials list and the record is still open, start at step 3. Otherwise, in the **System Administration** menu, click Specials Lists.
2 Select the list to work with. You can search to limit the lists shown. Specify all or part of the list name or description and then click **Search**.
3 Click View Account Assignments.

   Note: The View Accounts Assignments link does not appear for system-level lists.

4 Click **Assign Accounts**. The page refreshes and displays the list of accounts for the company associated with the selected list.
5 Select the check boxes for the accounts to which to assign the list.
6 Click **Assign**. The page refreshes with the selected accounts assigned.

Reviewing specials list account assignments

After you have assigned specials lists to accounts, you can review the assignments and make changes.

To review specials list account assignments:

1 On the Specials List page, select the list to work with and then click View Account Assignments.
2 On the Specials List Account Assignments page, you can review the list of assigned accounts. You also can remove one or more accounts by selecting the check boxes and clicking **Unassign**.

Working with shopping lists

9

Shopping lists can be created to group items that compliment each other. For example, suppose you sell gardening supplies. You could create a new gardener shopping list that included items for getting started such as gloves, a small shovel, easy to grow seed packs, and a watering can.

You can create as many shopping lists as you need for your different consumer markets or interests. And you can add as many items as you like to the list and control the order in which items are listed.

Review these topics for more information:

- "Creating shopping lists" on page 67
- "Adding items to shopping lists" on page 68
- "Removing items from shopping lists" on page 69
- "Resequencing items in shopping lists" on page 69
- "Assigning accounts to shopping lists" on page 70

Creating shopping lists

To create a shopping list:

1 In the **System Administration** menu, click Shopping Lists.

2 Click **Create**. The page refreshes and displays fields for defining the list.

3 Specify this information:

List Name
Specify the name of the list.

Company
Select the company for which the list is being created.

List Description
Specify descriptive text to identify the list.

System List
Select this check box if this is a system-level list, which is assigned to all account users of the selected company. Users cannot modify a system list.

Allow assigned users to modify list
This check box is displayed only if you have not selected System List. Select this check box if users assigned to this list can modify it. If users are permitted to modify the list, they can add and remove items or delete the list itself.

4 Click **Create**. The page refreshes and displays a message indicating that list has been created successfully. You can now add items to the list.

Adding items to shopping lists

There are two ways to add items to a shopping list. If you know item numbers, you can add items one at a time by specifying the item number. If you need to search for the items or you want to add a group of items all at once, you can use the Add Items link on the Shopping List page to search for, select, and add items to the list.

Adding an item by item number

1. If you have just created a shopping list and the record is still open, start at step 3. Otherwise, in the **System Administration** menu, click Shopping Lists.
2. Select the list to work with. You can search to limit the lists shown. Specify all or part of the list name or description and then click **Search**.
3. In the **Item Number** field, specify an item number and then click **Add**. The page refreshes to include the item in the list.
4. Repeat step 3 as needed.

Adding items by searching

1. If you have just created a shopping list and the record is still open, start at step 3. Otherwise, in the **System Administration** menu, click Shopping Lists.
2. Select the list to work with.
3. Click **Add Items**. The Item Search page is displayed.
4. Specify any of the following search criteria:

   Note: To display all items, leave search criteria fields empty and then click **Search**.

   Item Number
   Specify all or part of the item number.

   Item Product Description
   Specify all or part of the description.

Catalog
Select the catalog name.

Item Class/Item Sub Class
Select an item class or an item class and sub-class combination. After you select the item class, the page refreshes and the drop-down list for the sub-classes is displayed.

Item GL Code
Select an item GL code.

Item Price Class
Select the price class.

Product Restriction
Specify **All**, **Restriction allowed**, or **Restriction not allowed**.

5 Click **Search**.
6 In the search results, select the check boxes of the items to add to the shopping list and then click **Add**. You are returned to the Shopping List page with the selected items included in the list.

Removing items from shopping lists

To remove items from a shopping list:

1 If you have just created a shopping list and the record is still open, start at step 3. Otherwise, in the **System Administration** menu, click Shopping Lists.
2 Select the list to work with. You can search to limit the lists shown. Specify all or part of the list name or description and then click **Search**.
3 Select the check boxes next to the items to remove and then click **Delete**.

Resequencing items in shopping lists

Sequence numbers determine the order in which items are displayed on a shopping list. If a shopping list has multiple items, you can change the order in which they are listed. By default, item sequence numbers are incremented by ten as items are added.

To resequence items on a shopping list:

1 If you have just added items to a shopping list and the record is still open, start at step 3. Otherwise, in the **System Administration** menu, click Shopping Lists.
2 Select the list to work with. You can search to limit the lists shown. Specify all or part of the list name or description and then click **Search**.
3 Click Resequence Items.
4 Specify the new sequence numbers for the items.

5 Click **Resequence**. You are returned to the Shopping List page with items in the new order.

Assigning accounts to shopping lists

When you are satisfied with your shopping list, you can assign it to accounts. Assigning the list to accounts makes the list available to the account users when they shop. System-level lists are available for all accounts of a selected company and do not need to be assigned.

Note: If you assign individual accounts to a list, you cannot go back and make it a system list until you remove the account assignments.

To assign accounts to a shopping list:

1. If you have just created a shopping list and the record is still open, start at step 3. Otherwise, in the **System Administration** menu, click Shopping Lists.
2. Select the list to work with. You can search to limit the lists shown. Specify all or part of the list name or description and then click **Search**.
3. Click View Account Assignments.

   Note: The View Accounts Assignments link does not appear for system-level lists.

4. Click **Assign Accounts**. The page refreshes and displays the list of accounts for the company associated with the selected list.
5. Select the check boxes for the accounts to which to assign the list.
6. Click **Assign**. The page refreshes with the selected accounts assigned.

Reviewing shopping list account assignments

After you have assigned shopping lists to accounts, you may want to review the assignments and make changes.

To review shopping list account assignments:

1. On the Shopping List page, select the list to work with and then click View Account Assignments.
2. On the Shopping List Account Assignments page, you can review the list of assigned accounts. You also can remove one or more accounts by selecting the check boxes and clicking **Unassign**.

Understanding merchandising features

10

Merchandising functionality is provided with Storefront through EasyAsk Studio. Merchandising options allow you to feature products, create promotions, control navigation through attributes and categories, and define rules for promotional events.

Merchandising helps you present products in a way that encourages customers to buy. It allows interactive marketing with a goal of increased customer traffic, acquisition, and conversion. For example, with merchandising, you can highlight items from your catalog that influence shoppers to buy a product of greater value or profit margin. Merchandising also can influence shoppers to buy related items, accessories, or dependent items.

The EasyAsk Studio merchandising features you can use with Storefront include:

- Featured products: Identify products to display higher in the result set of matching products. You can display products at the top of the results set, a prime position on the page that is often associated with higher sales.
- Promotions: Define product relationships that promote cross-selling and up-selling of complementary products, thereby increasing order size.
- Attributes: Use attributes for analyzing, adjusting, and improving the presentation of search results. Product attributes give your customers alternate pathways to find products.
- Banners: Display certain products more prominently.
- Carve-outs: Reserve a section of the result set for special offers.
- Events: Define a time period for merchandising information.

Instructions for using merchandising features are provided in the EasyAsk Studio documentation. Use of banners requires minimal setup in Storefront Administration. See the field description for **Number of banners to display** in "Setting up system options" on page 14.

Working with warehouse groups

11

Use Storefront to set up warehouse groups and assign them to customer accounts. When account users place an order, the item availability calculation is based on all warehouses in the group rather than a single warehouse. For example, if you have a an account user in central Illinois who orders items stocked in four different warehouses in and around Illinois, you could create a Midwest warehouse group made up of these four warehouses and then assign the group to your account user in central Illinois.

You can add as many warehouses to a warehouse group as you need. And you can assign that warehouse group to as many account users as necessary.

Review these topics for more information:

- "Creating warehouse groups" on page 73
- "Searching for warehouse groups" on page 74
- "Assigning warehouses to warehouse groups" on page 74
- "Assigning warehouse groups to accounts" on page 75
- "Removing warehouse groups from accounts" on page 75
- "Editing warehouse group descriptions" on page 75
- "Deleting warehouse groups" on page 75

Creating warehouse groups

To create a warehouse group:

1 In the **System Administration** menu, click Warehouse Groups.

2 Click **Create**.

3 Specify this information:

Company
Select the company for which the warehouse group is being created.

Note: If no companies are displayed, run a data retrieve to update the database table. You may need to do this the first time you use this feature if you have upgraded Storefront but not yet retrieved data.

Name
Specify a name for the warehouse group.

Description
Specify descriptive text to identify the warehouse group.

4 Click **Create**. The page refreshes and displays a message indicating that the create was successful.

Searching for warehouse groups

You can use search criteria to limit the list of warehouse groups that are displayed on the Warehouse Groups page.

To search for warehouse groups:

1 In the **System Administration** menu, click Warehouse Groups.
2 Specify any of the following search criteria:

Company
Select the company number.

Company Name
Specify all or part of the company name.

Group
Specify all or part of the group name.

Group Description
Specify all or part of the group description.

3 Click **Search**. The Warehouse Groups page refreshes and displays a list of groups that match your search criteria.

Assigning warehouses to warehouse groups

To assign warehouses to a warehouse group:

1 If you have just created a warehouse group and the record is still open, start at step 3. Otherwise, in the **System Administration** menu, click Warehouse Groups.
2 Click the name of the warehouse group to which to assign warehouses.
3 Click **Assign Warehouses**. A list of all warehouses associated with the warehouse group company is displayed.
4 Select the check box of each warehouse to include in the group and then click **Assign**. You are returned to the Warehouse Group page showing the list of selected warehouses assigned to the group.

Assigning warehouse groups to accounts

To assign a warehouse group to an account, you'll use the **Warehouse Group** option on the Account Options page. See the **Warehouse Group** field description in "Setting account options" on page 43. You can assign any single warehouse group to any account associated with same company. And you can assign the same warehouse group to as many different associated accounts as necessary.

In order to have item quantity available calculated based on the warehouse group you assign to an account, you'll also need to select the appropriate calculation option. See the **Method of calculating quantity available** field description in "Setting account options" on page 43.

Removing warehouse groups from accounts

To remove a warehouse group from one or more accounts, simply edit the **Warehouse Group** option on the Account Options page for each account, or for the account profile assigned to accounts. See "Setting account options" on page 43. You must select a different warehouse group for the account or set the option to **Please Select One**.

Editing warehouse group descriptions

You can edit a warehouse group to change its description. If you need to change the company or name for a group, you can delete the group and create it again with the correct information. See "Deleting warehouse groups" on page 75 for more information.

To edit a warehouse group description:

1 In the **System Administration** menu, click Warehouse Groups.
2 Click the name of the group to change.
3 Edit the group description and then click **Update**.

Deleting warehouse groups

You can delete a warehouse group only if it is not assigned to any accounts. If a warehouse group has been assigned to one or more accounts, you can remove it from the accounts and then delete the group. See "Removing warehouse groups from accounts" on page 75 for more information.

To delete a warehouse group:

1 In the **System Administration** menu, click Warehouse Groups.
2 Select the check box of each group to delete. Click **Select All** to select all groups.

3 Click **Delete**.

Note: You can also delete a selected group on its Warehouse Group page by clicking **Delete**.

Working with ship-to groups

12

Ship-to groups can be created to group customer ship-to addresses for a customer. For example, assume you have a customer with a national chain of locations. To ship efficiently, you may want to group the customer's ship-to addresses based on the warehouse assigned to them. If you had three warehouses, you might create three ship-to groups for this customer, East Coast, Midwest, and West Coast. You can add as many customer ship-to addresses to a group as you need.

Review these topics for more information:

- "Creating ship-to groups" on page 77
- "Searching for ship-to groups" on page 78
- "Assigning ship-to addresses to ship-to groups" on page 78
- "Refreshing ship-to information" on page 79
- "Editing ship-to group descriptions" on page 79
- "Deleting ship-to groups" on page 79

Creating ship-to groups

To create a ship-to group:

1. In the **System Administration** menu, click Ship-to Groups.
2. Click **Create**.
3. Specify this information:

   Company
   Select the company for which the group is being created.

   Note: If no companies is displayed, run a data retrieve to update the database table. You may need to do this the first time you use this feature if you have upgraded Storefront but not yet retrieved data.

   Customer Number
   Specify the number of the customer for which this group is being created.

Name
Specify a name for the group.

Description
Specify descriptive text to identify the group.

4 Click **Create**. The page refreshes and displays a message indicating that the create was successful.

Searching for ship-to groups

If you have a large number of ship-to groups defined, it can be difficult to find the group you want to work with. If you are assigning ship-to addresses, editing, or deleting groups, you can use search criteria to limit the list of ship-to groups that appear on the Ship-to Groups page.

To search for ship-to groups:

1 In the **System Administration** menu, click Ship-to Groups.
2 Specify any of the following search criteria:

Company Number
Select the company number.

Customer Number
Specify all or part of a customer number.

Group Name
Specify all or part of the group name.

Group description
Specify all or part of the group description.

3 Click **Search**. The page refreshes and displays a list of ship-to groups that match your search criteria.

Assigning ship-to addresses to ship-to groups

To assign ship-to addresses to a ship-to group:

1 If you have just created a ship-to group and the record is still open, start at step 3. Otherwise, in the **System Administration** menu, click Ship-to Groups.
2 Click the name of the group to which to assign addresses.
3 Click **Assign Ship-to Addresses**.
4 Select the check box of each customer ship-to address to include in the group and then click **Assign**. You are returned to the Ship-to Group page with the selected addresses assigned to the group.

Refreshing ship-to information

Ship-to information that is modified on the ERP is not updated automatically in Storefront ship-to groups. After updates have been made to the ERP and the data has been retrieved into Storefront, you must refresh the information for Storefront ship-to groups.

To refresh ship-to information for a Storefront ship-to group:

1. In the **System Administration** menu, click Ship-to Groups.
2. Click the name of the group to refresh.
3. Click **Refresh Ship-to Info**. Updates from the ERP, including ship-to statuses, are synchronized with the ship-to information in this ship-to group.

Editing ship-to group descriptions

You can edit a ship-to group to change its description. If you need to change the company or name for a group, you can delete the group and create it again with the correct information.

To edit a ship-to group description:

1. In the **System Administration** menu, click Ship-to Groups.
2. Click the name of the group to change.
3. Edit the group description and then click **Update**.

Deleting ship-to groups

You can delete an individual ship-to group or multiple ship-to groups.

To delete a ship-to group:

1. In the **System Administration** menu, click Ship-to Groups.
2. Select the check box of each group to delete. Click Select All to select all groups.
3. Click **Delete**.

   Note: You can also delete a selected group on its Ship-to Group page by clicking **Delete**.

Working with pick-up locations

13

Pick-up locations are locations where your customers pick up their ordered goods. Typically, a pick-up location is a warehouse location that has a walk-up counter or supports retail sales. A pick-up location is associated with a warehouse on the ERP.

Review these topics for more information:

- "Creating pick-up locations" on page 81
- "Searching for pick-up locations" on page 82
- "Editing pick-up locations" on page 83
- "Deleting pick-up locations" on page 83

Creating pick-up locations

To create a pick-up location:

1 In the **System Administration** menu, click Pick-Up Locations.

2 Click **Create**.

3 Specify this information:

Company
Select the company for which to create a pick-up location.

Warehouse
Select the warehouse for which to create a pick-up location.

Location Name
Specify a name for the pick-up location.

Contact Name
Specify the name of the contact person at this location.

Contact Phone
Specify the phone number for this location.

Address
Specify the address for the location.

City
Specify the city for the location.

State
Specify the state for the location. Select the country before specifying the state, because the format of the **State** field varies based on the country selected in the **Country** field. If the country has state selections in the database, the **State** field displays as a drop-down list from which you can select a valid value. If the country does not have state selections, the **State** field displays as a text field in which you can type the relevant address information.

Postal Code
Specify the zip/postal code for the location.

Country
Specify the country for the location.

Notes
Specify any additional information for the location, such as pick-up hours or specific pick-up instructions. This information is for administrator use only; it is not displayed in Storefront Commerce.

4 Click **Create**. The page refreshes and displays a message indicating that the pick-up location was added successfully.

Searching for pick-up locations

You can use search criteria to limit the list of pick-up locations that are displayed on the Pick-Up Locations page.

To search for pick-up locations:

1 In the **System Administration** menu, click Pick-Up Locations.
2 Specify any of the following search criteria:

Company
Select the company.

Company Name
Specify all or part of a company name.

Warehouse
Select the warehouse.

Warehouse Name
Specify all or part of the warehouse name.

Location Name
Specify all or part of the location name.

3 Click **Search**. The page refreshes and displays a list of pick-up locations that match your search criteria.

Editing pick-up locations

You can edit a pick-up location to change any of its contact or location information. If you need to change the warehouse for a pick-up location, delete the pick-up location and add it again with the correct association.

To edit a pick-up location:

1 In the **System Administration** menu, click Pick-Up Locations.
2 Click the name of the pick-up location to change.
3 Edit the information and then click **Update**. For field information, see "Creating pick-up locations" on page 81.

Deleting pick-up locations

You can delete an individual pick-up location or multiple pick-up locations.

To delete a pick-up location:

1 In the **System Administration** menu, click Pick-Up Locations.
2 Select the check box of each pick-up location to delete. Click **Select All** to select all pick-up locations.
3 Click **Delete**.

   Note: You also can delete a selected pick-up location on its Pick-Up Location page by clicking **Delete**.

Working with email documents

14

Email documents can be sent to account users for order confirmation. You can create as many documents as you need. The email document is the email message subject and body. An order confirmation PDF file is attached to the message with more complete order confirmation information. You can design the order confirmation PDF file attachment through the Document Layouts function.

Review these topics for more information:

- "Creating email documents" on page 85
- "Editing email documents" on page 86
- "Deleting email documents" on page 87

Creating email documents

To create an email document:

1. In the **System Administration** menu, click Email Documents.
2. Click **Create**.
3. Specify this information:

   Name
   Specify a name for the document.

   Description
   Specify descriptive text to identify the document.

   From
   Specify the email address from which the message will be sent.

   Subject
   Specify a subject for the email message.

   Body
   Specify the body text of your email document message. You can use placeholder codes as required. When an email is sent, these placeholders show the real value of the parameter for a particular order. These codes can be used:

- &ORNO = Order Number
- &CONT = Contact
- &PONO = Purchase Order Number
- &CSNM = Customer Name
- &ORTP = Order Type
- &SHNM = Ship-To Name

Note: For line breaks and other formatting, you must use HTML tags.

For example:

```
Dear &CONT,
<br>
Thank you for your order! We are pleased that you chose us as
your fine paper supplier. Your order number is &ORNO.
<br>
Thanks again for shopping with us!
```

The above text is seen by Storefront users as this:

```
Dear John Smith,

Thank you for your order! We are pleased that you chose us as
your fine paper supplier. Your order number is 78554.

Thanks again for shopping with us!
```

4 Click **Create**. The page refreshes and displays a message indicating that the document was created successfully.

Editing email documents

To edit an email document:

1 In the **System Administration** menu, click Email Documents.
2 Click the name of the document to edit.
3 Edit the document and then click **Update**. For field information, see "Creating email documents" on page 85.

Deleting email documents

You can delete an individual document or multiple documents.

To delete an email document:

1. In the **System Administration** menu, click Email Documents.
2. Select the check box of each document to delete. Click **Select All** to select all documents.
3. Click **Delete**.

   Note: You also can delete a selected document on its Email Document page by clicking **Delete**.

Working with document layouts

15

Document layouts allow you to select the information to be included in documents used by Storefront to communicate order information to your site users. You can include order confirmation details in an email as HTML or an attached `.pdf` file. You can create as many layouts for a document type as you need.

Review these topics for more information:

- "Creating document layouts" on page 89
- "Working with the order confirmation document layout" on page 90
- "Editing document layouts" on page 91
- "Deleting document layouts" on page 91

Creating document layouts

To create a document layout:

1. In the **System Administration** menu, click Document Layouts.
2. Click **Create**.
3. Specify this information:

   Layout Type
   Select the type of document for which to create a layout.

   Name
   Specify a name for the document layout.

   Description
   Specify descriptive text to identify the document layout.

   Confirmation Format
   Select **HTML** to generate the document as HTML. Select **PDF** to generate a `.pdf` file.

4. Select each field that you want to display on the order confirmation.

   Note: If you select **Image**, you must provide the image directory in System Options. Refer to the **Document Image Directory** field in "Setting up system options" on page 14.

5 Click **Create**. The page refreshes and displays a message indicating that the create was successful.

Working with the order confirmation document layout

Currently, the only document layout type available in Storefront Administration is Order Confirmation. A default order confirmation document layout is provided for you. The Order Confirmation document layout functions as an 8.5 x 11 printable version for your website. It also can be used as an email attachment to the email confirmation document if you are sending order confirmation messages via email.

Your online store users can access the printable version from the Review Orders page by clicking the Printable Version link. Users also can select to have the confirmation sent to them via email by clicking the Email Order link on the same page. When users click the Printable Version link, the Order Confirmation document appears in a new window as a PDF file. The layout created through this option determines the information included in the confirmation. When users click the Email Order link, an email message is sent to the address specified in the account options or the address entered on the Checkout page.

Note: Orders that are split are handled differently for B2C and B2B accounts. For B2C, only one email message is sent for the original order, and the list of multiple orders created is not included. For B2B, an email message is sent for each split order, and the order confirmation document lists the order numbers of the split orders.

Setting up printable order confirmation document layouts

After you have created order confirmation document layouts, you can select a particular document to print from within Storefront Commerce. When account users have completed an order, they can print the order confirmation immediately rather than waiting for it to be emailed to them.

To set up a printable version of an order confirmation document:

1 Create an order confirmation document layout, if you don't plan to use the default layout provided. See "Creating document layouts" on page 89.

2 In System Options:

   a Select the layout in **Order Confirmation Document**.

   b Specify the path to the document image in **Document Image Directory**.

3 In Account Options, either select the layout in **Order Confirmation Document**, if you created account-specific layouts, or select **Default** to use the system settings.

Setting up order confirmation document layouts as email attachments

After you have created order confirmation document layouts, you can select a particular document to send as an attachment to an email confirmation message. When account users have completed an order, the message and attachment are automatically sent to them.

To set up an order confirmation document layout as an email attachment:

1. Create an email document. See "Creating email documents" on page 85. This document is the email message to which the Order Confirmation HTML or PDF file is attached.
2. Create an order confirmation document layout, if you don't plan to use the default layout provided. See "Creating document layouts" on page 89.
3. In System Options:
   a. Set **Email order confirmation** to **Yes**, provide any required server information, and select the document for the email message.
   b. Select the layout in **Order Confirmation Document** for the PDF file attachment.
   c. Specify the path to the document image in **Document Image Directory**.
4. In Account Options:
   a. Provide an email address for the account user.
   b. Select the layout in **Order Confirmation Document**, if you created account-specific layouts, or select **Default** to use the system settings.

Editing document layouts

To edit a document layout:

1. In the **System Administration** menu, click Document Layouts.
2. Click the name of the document to edit.
3. Edit the document layout and then click **Update**. For field information, see "Creating document layouts" on page 89.

Deleting document layouts

You can delete an individual document or multiple documents.

To delete a document layout:

1. In the **System Administration** menu, click Document Layouts.
2. Select the check box of each document to delete. Click **Select All**to select all documents.
3. Click **Delete**.

Note: You also can delete a selected document on its Document Layout page by clicking **Delete**.

Reviewing application activity

16

Storefront includes several inquiries that you can review to understand how your application is functioning. The Activity log tracks all application activity. The application statistics track the number of current users and the total number of users per day for the B2B interface, B2C interface, and customer inquiries.

Review these topics for more information:

- "Activity log" on page 93
- "Reviewing application statistics" on page 94

Activity log

The activity log tracks application activity, such as users logging in or logging out. The log includes the following information:

- Date and time of the recorded action. The date is shown in format selected in the System Options. Time is shown in HH:MM:SS format. Entries are sorted oldest to most recent.
- User ID associated with the action. System-level and user-level actions can be tracked. For system actions, SYSTEM appears in the User ID column. For user actions, the user ID for the account appears. Tracking user-level actions is based on the **Enable activity tracking** setting in System Options. See "Setting up system options" on page 14.
- Attempted action, such as B2C -Logout.
- A description that describes the result of the action, such as "Successful logout from application."

If multiple pages of activities are available, you can use the page number links to select a page. Use the page number links to access additional pages from which you can make a selection.

To make your activity log more manageable, follow the steps in these topics:

- "Limiting the activities displayed in the log" on page 94
- "Managing the log volume" on page 94

Limiting the activities displayed in the log

To limit activities displayed in the log:

1. In the **System Administration** menu, click Activity Log.
2. On the Activity Log page, you can limit the activities listed by date and user ID. Use the (select date) link for the **From** and **To** fields to limit the activities to a date range, and specify a user ID in the **User ID** field to limit the activity by user.
3. Click **Search**. The page refreshes and displays only activities that match your criteria.

Managing the log volume

As system activities are logged, the size of your activity log can grow quickly, especially if you also track account activity. You can reduce the size of your log by deleting activities no longer needed.

To delete activities from the log:

1. In the **System Administration** menu, click Activity Log.
2. Select the check box of each activity to delete. Click **Select All** to select all activities on all pages.
3. Click **Delete**.

Reviewing application statistics

Storefront tracks the number of current users and the total number of users per day. You can review this information and reset the values on the Statistics page.

You need to clear values only if you have restarted your server. When you restart the server, it locks the current users' values where they were when the server was stopped. If you restart the server while users have active sessions, clearing the values sets them to zero.

To review application statistics:

1. In the **System Administration** menu, click Statistics. The Statistics page is displayed, listing the number of current users, total users, and peak users for the day.
2. To clear the current user values, click **Clear Current Users Values**. The page refreshes and the current values are displayed.

Working with multiple sites

A

In Storefront System Controls, you can select the Multi Site Option. This option allows fully qualified domain name qualifiers (FQDN) to be assigned to an account. Each FQDN is treated as a distinct entity and can be assigned a unique B2C Anonymous Account. This option allows you to maintain multiple Storefront domains that use the same backend. Additionally, this allows different branding, such as logo, page layout, browse, pricing, styling, and static text from the properties files, to be displayed.

When using the Multi Site Option:

- A unique B2C-A account is assigned to every site.
- A site can be assigned to multiple B2B accounts.
- The same Account ID can be created for different domains but the account should be unique within a domain.

To use this option:

1. Select the Multi Site Option in System Controls.
2. Create the site or domain in Multi Site Maintenance.
3. Assign the site or domain to an account in Creating accounts.

Enabling the Multi Site Option

To enable the Multi Site Option:

1. Select **System Administration > System Options**.
2. Specify this information:

   Allow Multi Site
   Select this option to allow fully qualified domain name qualifiers (FQDN) to be assigned to an account. Each FQDN is treated as a distinct entity and can be assigned a unique B2C Anonymous Account. This option allows you to maintain multiple Storefront domains that use the same backend. Additionally, this allows different branding, such as logo, page layout, browse, pricing, styling, and static text from the properties files, to be displayed.

   Default Site
   Specify a default site if you enable the Multi Site option.

3 Click **Update** to save your changes.

Creating multiple sites

You can create multiple sites or domains after you enable the Multi Site Option.

To create a new site or domain:

1 Select **System Administration > Multi Site Maintenance**.

2 Click **Create**.

3 Specify this information:

Name
Specify a name for the site.

Account
Specify a unique B2C-A account for the domain.

Domain
Specify the domain, for example, **usprod1.infor.com**.

Logo
Specify the site logo file name to be selected from the images directory, for example, **logo.png**.

Order Conf Image Path
Specify the path for the order confirmation image.

SMPT Server
Specify the SMPT server name for the domain, for example, **smpt.prod.com**

Email order confirmation
Select **Yes** to send an email message to users when an order or quote is submitted. Otherwise,select **No**.

Order Confirmation Document Layout
Select the document layout to use for information provided in the order confirmation PDF file, theprintable version or email attachment. The documents available in this list are defined in the Documents Layout option. See "Working with document layouts" on page 89. If you select a document layout, PDF files are generated in your appserver directory. If the PDFfile fails to generate, it remains in this directory until you delete it.

Application.Properties
Specify the application properties file to use for this site or domain, for example, **application_en_US.properties**. Each Storefront domain has its own application.properties file for the application literals.

CSS
Specify the cascading style sheet (CSS) for the domain, for example, **CommerceBasicShellStyle-PC.css**.

Operation Mode
Select **B2B Only** to run a business-to-business only website. This type of operation mode provides an interface for registered users defined as customers on your ERP. Select **B2C Only** to run a business-to-consumer only website. This type of operation mode provides an interface for guest users. Select **Both B2B and B2C** to run both a business-to-business and business-to-consumer website. This type of operation mode provides an interface for all types of users, registered and anonymous.The features available to each type of user are tailored based on their account type.

Domain Contact Email
Specify an email contact for the domain.

Footer
Specify a footer for the domain.

Icon
Specify an icon file for the domain.The icon file must be 6px by 6px and end with a `.ico` in the images directory.

No Image
If there is no site level specify **no image**, and the default is applied.

Google Analytics Code
Specify a Google analytics tracking code to integrate Storefront to Google Analytics. If you registered your company with Google Analytics to track what a customer selects within Storefront Commerce, specify the tracking code that you received from Google Analytics. See the Google website for information on Google Analytics.

4 Click **Create**.

Assigning the site to an account

To assign a site to an account:

1 In the **System Administration** menu, click Accounts.
2 Select an existing Account or click **Create**.
3 Specify this information:

Site
Specify a default site for the account. This field is displayed only if you have enabled the Multi Site Option on System Controls.

4 Click **Update**.

Working with punchout websites

B

Punchout options allow a customer to access Storefront Commerce from within a supplier's website. The customer punches out from their Web-based catalog to Storefront Commerce to locate and order products. A vendor catalog that is enhanced for this process is known as a punchout catalog.

The punchout connection options enable communication between Storefront Commerce and the website so that relevant information about the transaction is delivered to the appropriate channels. You can use the Ariba based product on commerce XML (cXML) or the SAP based product Open Catalog Interface (OCI). Both products use a meta markup language and a protocol for data exchange between the applications.

Storefront needs to be installed with Ariba or SAP.

These are the URLs to be configured within Ariba to access Storefront Commerce:

- `request.url = http://server:port/storefrontCommerce/poLogin.do`
- `purchase.order.url = http:// server:port/storefrontCommerce/poOrder.do`

For the applications such as SAP using OCI, the punchout URL is `http://server:port/storefront Commerce/login.do?action=punchoutLogin&connectionId=X`. The punchout connection ID is passed in the parameter called connectionID, for example, `connectionId=X`.

For Punchout connections using XSL, the URLs are:

- `https://server:port/storefrontCommerce/poLogin.do?sfxslt={xsl file name}`
- `https://server:port/storefrontCommerce/poOrder.do?sfxslt={xsl file name}`

Note: See the website of the connection vendor for information on configuring the URLs.

After you establish the connection, you must complete the **Proceed to Checkout** and **End Session after Order Request** system options fields. See "Setting up system options" on page 14.

Setting up punchout connections

The punchout connection options enable communication between Storefront Commerce and the punchout website so that relevant information about the transaction is delivered to the appropriate channels.

To set up punchout connections:

1 In the **System Administration** menu, click Punchout Connections.
2 Click **Create**. The page refreshes and displays fields for defining the connection.
3 Specify this information:

Connection Type
Select the connection type for the punchout. You can select **cXML** for Ariba connections or **OCI** for SAP connections

Connection Name
Specify a name for the connection.

Override Ship-To Address
Select this check box if the customer's ship-to address should be overridden by the punchout website. Otherwise, the default ship-to address on the customer account is used.

For an OCI punchout connection, specify these fields:

User Name
Specify the user name for the connection.

Password
Specify the password.

Hook URL
Specify the URL of the application punching into Storefront. The data or cart items are posted from Storefront Commerce back to this URL.

Request Type
Specify the request type login when the catalog is first accessed.

Service
Specify the database identifier.

Ok Code
Specify **ADDI**.

Target
Specifies the frame to which a catalog is to return to in a frame-based environment. The default value is **_top**.

Caller
Indicates that the data was sent by an external catalog. Content must be set to **CTLG**.

Buyer
Specify the buyer for the user ID.

4 To save the connections, click **Create**. Additional options are displayed.
5 Specify this information:

Transmit Via
Select the type of protocols to organize and send the message for the punchout.

XSL File (Only for XML) *Optional*
If you selected to transmit via **XML**, an XSL file is used to transform the XML. This is the path to the XSL file. If the file exists in this path, it is used to generate the order CXML that is transferred to Ariba. The XSL file is extracted from the punchout connection assigned to that account.

6 To save your changes, click **Update**.

Viewing punchout logs

The punchout log tracks punchout activity, such as users logging in or logging out, statuses, and transactions. You can use the log to troubleshoot communication issues between Storefront Commerce and the external third party vendor.

The log includes:

- Login requests and responses
- Requisition tracking
- Purchase order requests, creation, and response
- Ability to re-submit failed transactions in the log

You can re-submit failed transactions in the log.

To view a punchout log:

1. In the **System Administration** menu, select Punchout Log.
2. On the Punchout Log page, you can limit the activities listed by date and user ID. Use the (select date) link for the **Start Date** and **End Date** fields to limit the activities to a date range, and specify a user ID in the **User ID** field to limit the activity by user.
3. Click **Search**. The page refreshes and displays only activities that match your criteria.

Working with punchout dataflow using cXML

This section describes how to sign in to the punchout server using cXML and then how the data flows from Storefront to the eProcurement system.

Signing in

When an eProcurement system or any external system makes a punchout request to Storefront using cXML, you must complete these fields to sign in:

1. Domain (network ID)
2. Identity (user ID)
3. Shared secret (password)

Checking out

After a successful sign in, when the user checks out, Storefront sends this information to the eProcurement system:

- Item quantity (quantity)
- Product number in Storefront (partId)
- Object of type CxmlMoney contains amount and currency (unitPrice)
- Description of the product (productDescription)
- Unit of measure (unitOfMeasure)
- United Nations Standard Products and Services Code (UNSPSC)
- Header ID for configurable products in Storefront (configHeaderId)
- Line ID for configurable products in Storefront (configLineId)
- Warehouse ID in Storefront (warehouseId)
- Item ID in Storefront (partSfId)

Submitting orders

If the eProcurement system submits orders to an ERP using Storefront, then these order fields are required for a successful order submission:

- Header
  - To
  - From
  - Sender
  - Warehouse
  - Email
- Order Request Header
  - Order date - Date order was submitted
  - Order ID
  - Type - Quote or order (**Q** for quote and **O** for order. Order is the default value)
  - Ship to Address
  - Bill to Address
- Line Item
  - Item ID
  - Supplier Part ID
  - Supplier Part Auxiliary ID
  - Quantity
  - Item Detail
  - Unit Price - Object of type CxmlMoney contains amount and currency (unitPrice)
  - Description
  - Unit of Measure

Working with punchout dataflow using OCI

This section describes how to sign in to the punchout server using OCI and then how the data flows from Storefront to the eProcurement system.

Signing in

When an eProcurement system or any external system makes a Punchout request to Storefront using OCI, you must complete these fields to sign in:

1. User Name (usr_name)
2. Password (usr_password)

Checking out

These product detail are sent in HTML format to the eProcurement system after a user successfully signs in and checks out:

- Vendor Product Number (NEW_ITEM-VENDORMAT)
- Manufacturer's Product Number (NEW_ITEM-MANUFACTMAT)
- Item description field 1 and 2 (NEW_ITEM-DESCRIPTION)
- Product Description Long (NEW_ITEM-LONGTEXT)
- UNSPSC (NEW_ITEM-MATGROUP)
- Quantity ordered (NEW_ITEM-QUANTITY)
- Unit of measure (NEW_ITEM-UNIT)
- Item price (NEW_ITEM-PRICE)
- Currency (NEW_ITEM-CURRENCY)
- Configuration header ID for the configurable product (NEW_ITEM-CONFIG_HEADER_ID)
- Configuration line ID for the configurable product (NEW_ITEM-CONFIG_LINE_ID)

Storefront supports only an HTML format for the OCI Punchout.

Storefront schema

C

The Storefront schema is available with the product. The Storefront schema information includes:

- Tables

  Shows tables that store data entities, for example, customer, account, and items.
- Relationships

  Shows relationships among different entities or tables.
- Utility Tables

  Shows tables for which no relationship is found in the database metadata.
- Constraint

  Shows the detail of all constraints defined on every field of all tables.
- Anomalies

  Shows details about the deficiencies found in the database, for example, columns that are defined as both nullable and unique, and tables without indexes.
- Columns

  Lists the detail of every column in the database.

Accessing the Storefront schema

To access and view the storefront schema:

1. Extract the `storefront-schema.zip` file found in the build.
2. Double-click the `storefront-schema/index.html`. The Storefront schema is opened in the browser using an open source tool called SchemaSpy.
3. Navigate to the table structures, constraints, and relationships among the objects by selecting the tab.