ORACLE®

COMMERCE

Version 11.1

Merchandising Guide for Business Users

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Product version: 11.1
Release date: 06-27-14
Document identifier: MerchandisingUserGuide1512080701

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1   Introduction

Oracle Commerce Merchandising is a browser-based application that you use to create and manage catalogs, products, promotions, coupons, and pricing for one or more commerce Web sites. You can perform the following activities in Merchandising:

- Set up catalogs and populate them with categories, products, and SKUs. You can create catalog assets directly in Merchandising or import them, for example, from a feed.

- Create and manage promotions and coupons that allow you to offer discounts on specific products or groups of products.

- Create and manage media content items, such as articles, images, audio clips, and video clips.

Merchandising is installed as part of the Oracle Commerce Core Platform and is accessed from the Business Control Center.

About this Manual

This manual is intended for business users (merchandisers), who use Merchandising to create and maintain product catalogs for commerce Web sites. This guide provides overview topics to familiarize merchandisers with the features and concepts of the application and procedure topics that provide instructions for accomplishing merchandising tasks.

For information about installing and configuring Merchandising, see the *Merchandising Administration Guide*.

For information about starting and logging into Merchandising, see the chapter *Working in Merchandising* (page 3).

2   Working in Merchandising

This chapter describes how to log into Merchandising and provides an overview of the user interface. To learn how to perform specific Merchandising tasks, like creating and updating catalogs, products, and site content, see *Creating and Managing Assets* (page 27).

Accessing Merchandising

You access Merchandising through the Business Control Center. These instructions assume that the appropriate Oracle Commerce Platform products and databases are running and you have been assigned a login name and password. If you need a login or are unsure of your organization's Oracle Commerce Platform installation details, contact your administrator. If you are an administrator, refer to the *Merchandising Administration Guide*.

Starting the Business Control Center

Your Oracle Commerce Platform products must be configured and running before you can access the Business Control Center. You must also configure a supported database. For more information, contact your administrator or see the *Platform Installation and Configuration Guide*.

1. Ensure your database and Oracle Commerce Platform applications have been started.

2. Point your Web browser to the server where the Business Control Center is running. The URL takes the following form:

   ```
   http://hostname:port/atg/bcc
   ```

   where `hostname` is the name of the server, and `port` is the number of the port which that server uses for the Business Control Center.

   ```
   http://anycorp.androcles:8080/atg/bcc
   ```

   If you are running the Business Control Center on a local machine, enter the following URL:

   ```
   http://localhost:port/atg/bcc
   ```

   The default port numbers for Oracle WebLogic, JBoss, and IBM WebSphere are 7001, 8080, and 9080 respectively. See the *Platform Installation and Configuration Guide* for details.

3. When the Business Control Center login dialog box appears, enter the login name and password defined in your user profile. The fields are case sensitive.

The following image shows the Business Control Center Home page, which appears after you log in:
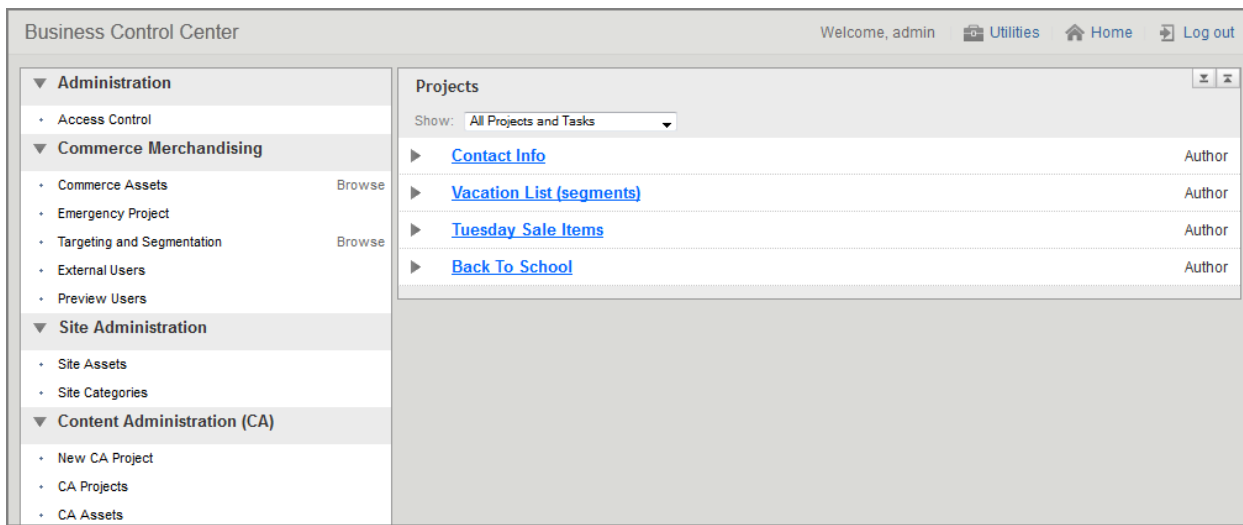
The Business Control Center Home page includes the following elements:

- The **Welcome** bar at the top shows the name of the logged-in user (the values of the first name and last name properties in the user profile).

- The **Utilities** menu contains a link to the product documentation.

- The **Home** link returns you to this page from other parts of the Business Control Center.

- The **Log Out** link ends your Business Control Center session.

- The **Projects** panel shows the ATG Content Administration projects that have been created in your system. For more information on Merchandising projects, see Project Basics (page 5).

- The **Operations** list contains the options you use to enter the editing interfaces for the Oracle Commerce applications available to you. The options vary according to the following:

  - The options that your role has permission to use.

  - The Oracle Commerce modules and applications that are running on the server.

Using the Operations List

The Operations list in the left pane contains the options you use to access Merchandising features. Click the Commerce Merchandising item to display the following options:

- Commerce Assets: Select this option to create a new Merchandising project.

- Browse: Click this link to display Merchandising in read-only mode. In read-only mode, you can view commerce assets, but you cannot change or create them.

For details on the Targeting and Segmentation, External Users, and Preview Users menu items shown in the image, see the *Business Control Center User's Guide*. For details on using the Content Administration (CA) menu

item, see the *Content Administration Guide for Business Users*. Additional options may appear in the Operations menu for other Oracle Commerce Platform applications. Refer to the documentation for those applications.

Using the Projects List

The Projects list in the right pane of the Business Control Center Home page allows you to view and edit projects that you have created or that contain tasks assigned to you. If you create a project through the Operations menu, but you do not complete it, you can use the Projects list to access it later for editing. For more information, see .
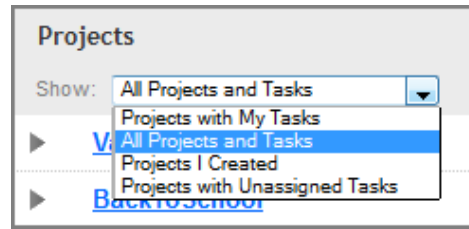
Using the Back Button in the Browser

Avoid using your browser's Back button to navigate in Merchandising. Wherever possible, use the links and other navigation controls in the Business Control Center to move from one page to another. Depending on the operation you are performing, using the Back button to redisplay a page may occasionally cause data conflict, resulting in errors. If an error does appear after you click the Back button, close the browser and restart it.

Refreshing the Browser

Do not click your browser's Refresh or Reload button while working in Merchandising. Depending on the operation you are performing, refreshing your browser causes adverse results, including the loss of any unsaved changes.

Project Basics

Assets that you work with in Merchandising must be published to your live sites along with any other items necessary for running the sites. These necessary items include individual pieces of content, images, style sheets, and the Web pages themselves. The process of publishing assets from a development environment to a live site is managed by ATG Content Administration. The following are some key terms that you need to be familiar with when you work in Merchandising projects:

- **Project:** ATG Content Administration controls the lifecycle of items that are published to your Web sites through an entity called a project. A project contains a set of tasks that define the stages of the creation and publishing lifecycle. Typically, tasks include authoring, approval, and deployment. Tasks can be completed by different users. For example, the approval task could be completed by a supervisor, and the deployment task could be performed by a Web site administrator.

Often, a project represents a logical grouping of items related to a particular business goal. For example, you could have a project called Back to School that contains all the items you need to create a microsite that highlights back-to-school products and promotions. Any number of items can be managed and deployed by a single project.

An Emergency project is a special kind of project that allows you to update a production or staging site within a few minutes. Emergency projects bypass the standard deployment steps, and use an emergency workflow that has only two steps. It is important to note that this project should be used with caution.

- **Asset:** In ATG Content Administration, any item that you create, edit, and deploy is referred to as an asset. Merchandising assets include catalogs, products, SKUs, promotions, and price lists. To learn how to work with commerce assets, see *Creating and Managing Assets* (page 27).

- **Versioning:** As well as managing the creation and deployment of assets, ATG Content Administration performs a type of source control, called versioning, on each asset. When you create an asset, the system gives it the number 1. When you or another user edits the asset, a second version is created, and versions 1 and 2 are both stored in the system. This behavior has two purposes: it prevents conflicts when two or more people edit the same asset, and it allows you to recover from errors by reverting to a previous version of an asset at any time. See Resolving Conflicts with Other Projects (page 10) for more information.

For detailed information on any of these terms, or for more information about versioning and deployment, refer to the *Content Administration Guide for Business Users*.

Starting a New Project

Whenever you work on commerce assets in Merchandising, you begin by creating a project based on one of the available Merchandising project types in the Business Control Center. The type of project determines the workflow you use to perform project tasks and the assets and views that are available to you in Merchandising.

To start a new Merchandising project:

1. Start the Business Control Center.

2. In the Operations list, Click Commerce Merchandising, then click Commerce Assets.

3. Enter a name (up to 50 characters) and description for the project.

    It is a good idea to use a distinctive name so that you and other merchandisers can easily distinguish projects. Project names do not have to be unique, however. The description is optional but can be helpful if many projects have similar names.

4. Click Continue.

    Merchandising appears, with the Author task active. You can now start creating and editing assets, which automatically adds them to the project. See *Creating and Managing Assets* (page 27) to start working with your catalog.

Opening an Existing Project

If someone else created a project for you to work in, or if you did not finish all your work in one session, you can access an existing project using the To Do List.

To open an existing Merchandising project:

1. Start the Business Control Center.

2. Select a Show option from the Projects list:

    •   **Projects with My Tasks** displays only projects with active tasks that are assigned to you. Projects you created appear in this list only if you are assigned to the current task.

    •   **All Projects and Tasks** displays all active projects and shows the task that is currently active for each one.

    •   **Projects I Created** displays all active projects that you created.

    •   **Projects with Unassigned Tasks** displays active projects whose current task has not been assigned to anyone.

3. Click the project name.

    Merchandising appears, with the Author task active. You can now continue working with the project.

Adding Assets to a Project

Assets must be part of a project so that they can be versioned and deployed. Creating and editing assets in Merchandising automatically adds them to the current project. You can also manually add assets to a project in the Navigation pane or in an editable Preview session. For more information, see Navigation Toolbar (page 17) and *Working with Visual Merchandising* (page 49).

To see the assets that have been added to the current project, click the name of the project at the top of the Merchandising window. In the following example, the project is called BackToSchool.

Merchandising displays the project dialog box, which contains all the project's assets.

When you create an asset, for example a product, the asset is automatically added to the current project, with the status New in the project dialog box. The new asset also appears in the Navigation pane for this project. The asset will be published to the live Web site when the project is deployed. The asset is also added to the versioning system.

If you plan to modify an asset but have not yet done so, you can add it to the project manually:

1. Select the assets to add. See Using the Navigation Pane (page 17).

2. Click the Actions menu and select Add to Project.

Note: For information about adding an asset to the project while previewing your site, see *Working with Visual Merchandising* (page 49).

Removing Assets from a Project

When you remove an asset marked as new, the asset is simply deleted from the system. When you remove an asset that you changed as part of this project, the changes are discarded and the asset is removed from the project. The previous versions of the asset still exist in the system.

To remove assets from a project, click the name of the project at the top of the Merchandising window to display the project dialog box.

• To remove an asset, click the x icon that appears next to the asset's status.

- To remove all assets, click the Select All link above the list of assets. Then click the Actions menu and select Remove from Project.

Automatically Resolving Version Conflicts

When you advance your project to the next task, Merchandising attempts to automatically resolve all the conflicts in your project. You can, however, automatically resolve conflicts in your project at any time, without moving it out of the Author stage.

To automatically resolve version conflicts in a Merchandising project:

1. In a Merchandising project, click the project name at the top of the Merchandising window to display the project dialog box, which contains all the project's assets.

   Assets that are out of date and need to be merged with the latest version appear at the top of the list and are marked with an icon.

2. Click the Actions menu and select Resolve Conflicts.

   A progress bar appears at the bottom of the project. When the operation is finished, Merchandising displays a message that tells you how many conflicts were resolved and how many you must resolve manually.

   For information about manually resolving version conflicts, see Resolving Conflicts with Other Projects (page 10).

3. (Optional) To cancel the operation, click the x icon that appears next to the progress bar.

Completing Tasks in a Project

When you finish working on a task, you move the project to the next task in the workflow. For example, when you have finished creating the assets for a project, you must indicate that the Author task is complete so the next stage, usually a Content Review task, can start. Deployment is the last task in any project; the assets can be deployed to the live site only when all other tasks have been completed.

The default Commerce Assets workflow includes the following tasks:

- Author

- Content Review

- Approve for Production Deployment

- Wait for Production Deployment Completion

- Verify Production Deployment

Note: If your environment uses a staging site as well as a production site, a similar set of tasks is available for deploying to staging.

To complete a task in Merchandising:

1. Open the Merchandising project whose current task is complete.

2. Click the Task Action menu and select the next task in the list.

   If the next task is assigned to you, Merchandising remains in your browser so you can start working on that task.

If the next task is not assigned to you or if there are no more tasks, the Business Control Center appears. You can either log out or begin working on another project.

3. If assets in your project are not up to date, Merchandising tries to resolve the conflicts before advancing the project to the next task.

   If Merchandising cannot resolve all the conflicts it displays a warning and does not allow you to advance the project to the next task until you resolve the conflicts between the two versions. See Resolving Conflicts with Other Projects (page 10) for more information.

Notes:

• If the project has moved beyond the Author task to the Approve Content task, the assets can no longer be edited. To reactivate the Author task and allow asset editing, select Reject from the Select Action menu for the Approve Content task.

• If any of the deployment tasks are active (for example, Approve for Production Deployment), the assets cannot be edited. To reactivate the Author task in this case, select the corresponding Revert option from the Select Action menu and continue to select this option for each task until the Author task is active again.

• To delete a project, select Delete Project from the Actions menu for the Author or Content Review tasks. When you delete a project, the assets that were created for this project are not added to the versioning system, and any changes you made to existing assets through this project are not saved in the system as new versions.

• For more information about projects and tasks, see the *Content Administration Guide for Business Users*.

Resolving Conflicts with Other Projects

Merchandising warns you if the asset you used to create your working version has been changed and checked in by someone else. For example, suppose Ray adds 50 products to a new project. You add the same products to a different project. Ray edits the working version of the asset and deploys his project. The assets in his project are checked in and constitute a new base version of those assets. They now contain changes that the working versions in your project do not contain.

When you advance your project to the next task, Merchandising attempts to automatically resolves all the conflicts in your project. If not all conflicts could be automatically resolved, Merchandising displays a message that tells you that assets in your project are not up to date and does not allow you to advance the project until you resolve the conflicts between the two versions.

Asset Versions

When you edit an asset, you add the asset to your project and a new working version of that asset is created. When you complete your edits, you advance the project and deploy the asset. After the deployed change is accepted, your working version is checked in and becomes the head version of the asset on the main branch.

In some cases, another merchandiser might add the same asset to a different project. In that case, there are two working versions of the main asset, one in each project. Whichever working version is checked in first becomes the next main version. Any differences between the new main version and the working version in the other project must be resolved before the second project can advance to the next task.

Conflict Resolution

A version conflict occurs when the main version of an asset has been updated by another project while you are in the process of working on a previous version. To avoid losing the changes from the other project, you must merge them into your version before you can deploy. This process is called *conflict resolution*.

To resolve a version conflict, you review the changes made to your project and then compare them to the changes made in the checked-in project. You can then choose whether to keep the original version, your version, or the checked-in version from the other project. After the conflict is resolved, the base version referenced by your project is updated with the latest checked-in version, and your working version is -updated with the values you chose when you resolved the conflict.

If there are conflicts between collection properties (lists, sets, maps, or arrays), Merchandising suggests an additional value that combines your changes with the changes from the other project. For more information, see Conflict Resolution for Collection Properties (page 12).

The following figure shows the conflict resolution process:
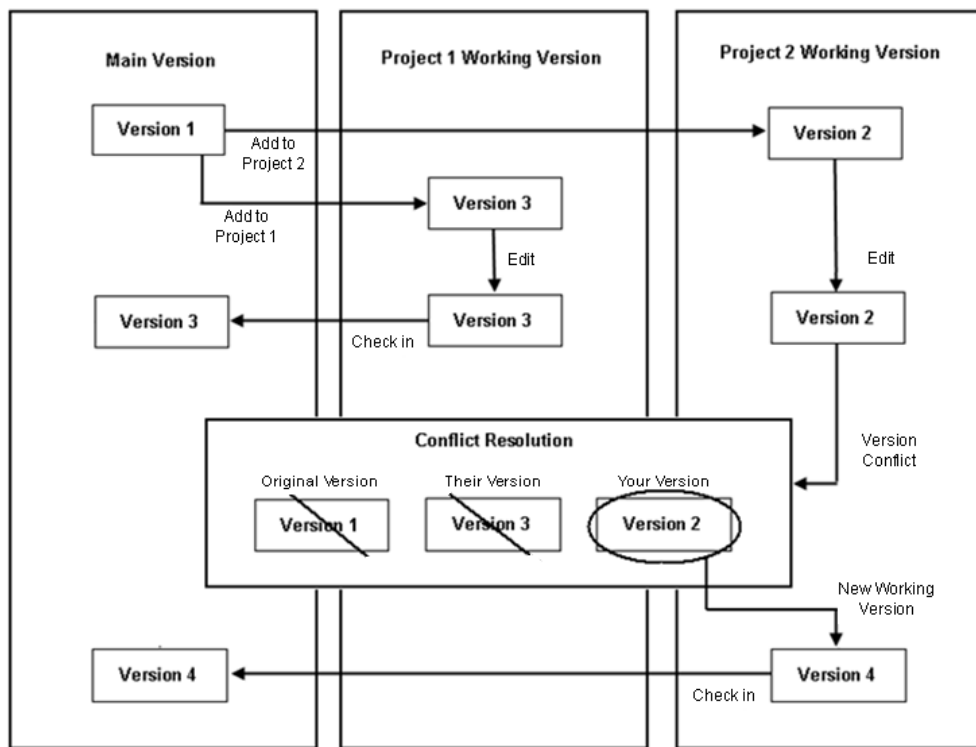
Manually Resolving Version Conflicts

To resolve a version conflict in a Merchandising project:

1. In a Merchandising project, click the project name at the top of the Merchandising window.

    In the following illustration, the project name is Back To School.
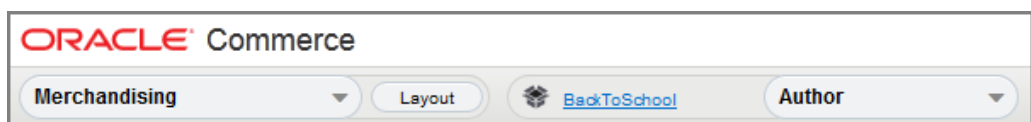
Assets that are out of date and need to be merged with the latest version appear at the top of the list and are marked with an icon.

2. Select the name of the asset to open it in the Details pane.

3. Click Review Changes.

   The Review Changes dialog box shows the properties that are in conflict. If there are modified properties that are not in conflict, they appear in a second table (see Reviewing Changes (page 36)).

Original Version	Their Version	Your Version	Merged Version
◯ 1. Crystal Decanter	◯ 1. Crystal Decanter 2. Medium Crystal Decanter	◯ 1. Crystal Decanter 2. Large Decanter 3. Small Decanter	◯ 1. Large Decanter* 2. Small Decanter* 3. Medium Crystal Decanter* 4. Crystal Decanter

4. Choose the value that you want to keep in your project:

   • Original Version—this is the value that you started with when you added the asset to your project.

   • Their Version—this is the value that was deployed by another user since you added the asset to your project.

   • Your Version—this is the value from your working version.

   • Merged Version—this value appears only for collection properties and shows a suggested combination of Their Version and Your Version. See Conflict Resolution for Collection Properties (page 12).

5. Click Resolve Conflicts.

   The asset is updated with the property values you select.

6. Repeat these steps for each conflict until no more asset conflicts appear in the Project dialog.

7. When you are satisfied with your working versions, advance your project to the next task. See Project Basics (page 5).

Conflict Resolution for Collection Properties

Resolving conflicts between lists, maps, sets, and arrays is often more complicated than simply picking one version over another, so Merchandising suggests a combination of the two versions. You can choose the original version, your version, the version from the other project, or the suggested combination. If none of the options provides exactly what you want, choose the option closest to your desired value and then modify the asset before advancing the project to the next task.

In the suggested combination:

• Added, reordered, and changed items appear at the top and are marked with an asterisk.

• Unchanged items appear next in normal text.

• Removed items are displayed at the bottom of the list with a strikethrough. These items are shown for your information and are not part of the suggested collection.

The following figure shows an example of a collection property that has a conflict with another project:

Note: Suggested combinations are provided only for collection properties. The Merged Version column is blank for other property types. If there are no collection properties in conflict, then the Merged Version column does not appear.

The sections that follow describe how Merchandising determines the merged changes.

How Collection Values Are Merged

To determine the difference between conflicting collections, Merchandising finds the differences between Their Version and Original Version, then finds the differences between Your Version and Original Version, and finally combines the two sets of differences and applies them to Original version.

These rules determine the final outcome:

• Changed, reordered, and added items in either project's collection (theirs or yours) are moved to the top of the suggested merged version.

• When updates to an item in a collection conflict between your version and the other version of the collection, your updates take precedence, unless the item was removed in the other version.

• If an item is removed from the collection in one project and changed or reordered in the other, the remove operation overrides the change or reorder operation by default. You can configure this setting. See Conflict Resolution for Collection Properties (page 12).

Sets

Sets are not ordered and do not allow duplicates, and are therefore simpler to combine than other types of collections. When versions of sets are combined, Merchandising considers only additions and removals when creating the merged version. If both projects add or remove the same item, then that item appears only once in the merged list.

The following examples illustrate how sets are combined.

In the following table, removed items are not shown in the merged version. In Merchandising, removed items are displayed at the bottom of the Merged Version column with a strike through the name.

Conflict Description	Original	Their Version	Your Version	Merged Version
Two projects add different items Both items are added.	Blue Green Red	Blue Green Red **Yellow**	Blue Green Red **Orange**	***Yellow** ***Orange** Blue Green Red

Conflict Description	Original	Their Version	Your Version	Merged Version
Two projects remove different items Both items are removed.	Blue Green Red	Blue Green	Green Red	Green
Two projects add and remove different items All items marked for add are added and all items marked for removal are removed.	Blue Green Red	Blue Green **Yellow**	Blue Red **Orange**	***Yellow** ***Orange** Blue

Maps

Maps are collections that contain key/value pairs that map one value to another, such as a list of sizes and their numeric equivalents. Changes to maps can include:

· Adding key/value pairs

Maps do not allow duplicate keys, so if both projects add the same key/value pair to the map, then it is added only once. For example, if your project adds the key value pair M = 6-8 and another project adds the key/value pair M = 8-10, then your changes, M = 6-8, take precedence.

· Editing the key or the value in an existing key/value pair

If each project provides a different value for the same key/value pair, then the change from your project takes precedence and is kept in the combined changes. For example, if your project edits the value of the key XL so that XL = 14 and another project edits the key XL so that XL = 16, then your changes take precedence.

· Removing key/value pairs

The following table provides some examples of how changes to map items are combined. Removed items are not shown in the merged version. In Merchandising, removed items are displayed at the bottom of the Merged Version column with a strike through the name.

Conflict Description	Original	Their Version	Your Version	Merged Version
One project removes a map item, the other project adds a map item The removed item is removed and the added item is added.	S (4-6) M (8-10) L (12-14)	S (4-6) M (8-10) L (12-14) **XL (16-18)**	S (4-6) L (12-14)	**XL (16-18)*** S (4-6) L (12-14)
One project edits an item, the other project adds an item The edited item is updated and the added item is added.	S (4-6) M (8-10) L (12-14)	S **(2-4)** M (8-10) L (12-14)	S (4-6) M (8-10) L (12-14) **XL (16-18)**	S **(2-4)*** **XL (16-18)*** M (8-10) L (12-14)

Conflict Description	Original	Their Version	Your Version	Merged Version
One project edits an item, the other project removes the item The item is removed. **Note:** You can configure whether removed items take precedence over changed items. See Conflict Resolution for Collection Properties (page 12).	S (4-6) M (8-10) L (12-14)	S **(2-4)** M (8-10) L (12-14)	M (8-10) L (12-14)	M (8-10) L (12-14)
Both projects edit the same item The value in your project is kept.	S (4-6) M (8-10) L (12-14)	S **(2-4)** M (8-10) L (12-14)	S **(2-6)** M (8-10) L (12-14)	S **(2-6)*** M (8-10) L (12-14)
Each project edits a different item Both changes are kept.	S (4-6) M (8-10) L (12-14)	S **(2-4)** M (8-10) L (12-14)	S (4-6) M **(6-8)** L (12-14)	S **(2-4)*** M **(6-8)*** L (12-14)

Lists and Arrays

Lists and arrays are collections that contain ordered lists of items and, if you have not prohibited them, can contain the same item multiple times. Changes to lists and arrays can include:

- Adding items

- Reordering items

- Removing items

- Adding, reordering, or removing duplicate items (if allowed in your environment)

  For information about preventing duplicates, see the *Business Control Center Administration and Development Guide.*

Note: In some cases, items that were not explicitly changed in either project are marked as changed in the suggested combination because of the way Oracle Commerce Platform calculates reordering.

The following table provides some examples of how changes to lists and arrays are combined. Removed items are not shown in the merged version. In Merchandising, removed items are displayed at the bottom of the Merged Version column with a strike through the name.

Conflict Description	Original	Their Version	Your Version	Merged Version
Two projects reorder items The two list orders are combined. **Note:** Item B is marked as changed although it appears to be the same in all collections. This is because of the way that Oracle Commerce Platform calculates reordering.	A B C D E	**C** B **A** D E	**E** B C D **A**	**A*** **B*** **C*** **E*** D
Two projects add different items to the same location The items are added to the top of the list.	A B C	A B C **D**	A B C **E**	**D*** **E*** A B C
Two projects add the same item in different locations The item is added twice to the top of the list. **Note:** If duplicates are prohibited, the item is added only once.	A B C	A **D** B C	A B **D** C	**D*** **D*** A B C
One project reorders items, the other project removes an item The two list orders are combined and the removed item is removed. **Note:** You can configure whether removed items take precedence over reordered items. See Conflict Resolution for Collection Properties (page 12).	A B C D E F G	**B** **D** **E** **F** A C G	A B D E F G	**A*** **E*** **F*** B D G
One project adds items, the other project removes an item The new items are added to the top of the list, and the removed item is removed.	A B C D	A B C D E F	A B D	**E*** **F*** A B D

Maximum Collection Size for Combining Changes

For very large collection values, Merchandising displays only the first 2300 items on the Review Changes page by default. As a result, if any conflicting version contains more items than the display limit allows, then a merged version is not suggested because the combinations cannot be displayed.

3 Merchandising UI Overview

This chapter provides an overview of the main elements of the Merchandising user interface. To learn how to use the interface to perform merchandising tasks, see *Creating and Managing Assets* (page 27).

When you create or open a project from the Business Control Center Home page, the Merchandising main page opens. The main page has two panes: a Navigation pane on the left and a Details pane on the right. A navigation bar across the top provides links to common options and information about the current session.

Navigation Basics

The following are some key terms that you need to be familiar with when you browse or search for items in the Merchandising Navigation pane:

- **Parent assets** are those immediately above the current asset in the hierarchy. For example, Accessories might be the parent category of the product Shoulder Bag.

- **Ancestors** are all the assets from which the current asset descends. For example, Commerce Root, Women's Apparel, Gift Ideas, For Her, and Accessories are all ancestor categories of the product Shoulder Bag.

Using the Navigation Pane

The Navigation pane on the left-hand side of the Merchandising window lets you browse or search for commerce assets.

Note: This section describes how to use the Navigation pane assets available when you select Merchandising from the application dropdown menu. To learn how to find and browse other types of assets, see the following chapters:

- SEO tags: *Creating and Managing SEO Tags* (page 107)

- Price lists: *Creating and Managing Price Lists* (page 165)

Navigation Toolbar

The toolbar at the top of the Navigation pane is available in both the browse and find views.
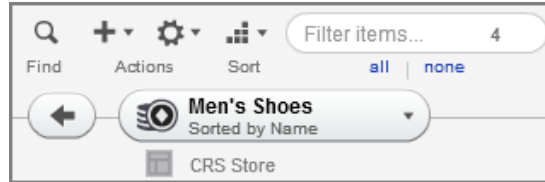
The following elements make up the toolbar:

• The **Find/Browse** button switches between the Browse panel and the Find panel.

• The **Create** button lets you add new assets.

• The **Actions** button lets you work with selected assets. You can edit, move, duplicate, link, and export assets. You can also add selected assets to a project and view their child assets.

• The **Sort** button lets you sort the list of assets by name or ID, in ascending or descending order.

• The **Filter** tells you how many assets appear in the list and lets you filter the list.

• The **Select** links select and deselect all the assets listed in the Navigation pane. Click all to select everything in the list; click none to deselect everything.

Browse Panel

Use the Browse panel to navigate the asset hierarchy. For example, you can explore products using the catalog hierarchy, find media assets by folder, or display an alphabetical list of promotions. Your Merchandising administrator configures the hierarchy of assets displayed in the Browse panel.

Click the arrow button next to each asset to drill down to the next level. For example, click the arrow next to a category to see the list of products it contains. The name of the parent asset displays above the list of its children. For example, in the following illustration, the Home Store Root category is the parent asset; its child categories are listed below it.
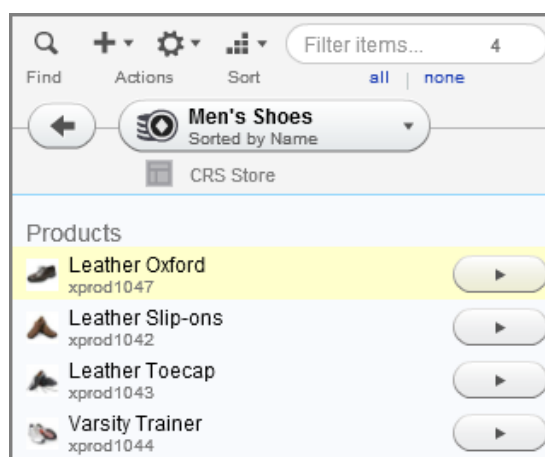
To move backwards through the hierarchy one level at a time, click the back arrow to the left of the parent asset. To choose a level in the hierarchy to move back to, click the down arrow to the right of the parent asset, then select an ancestor asset from the list.
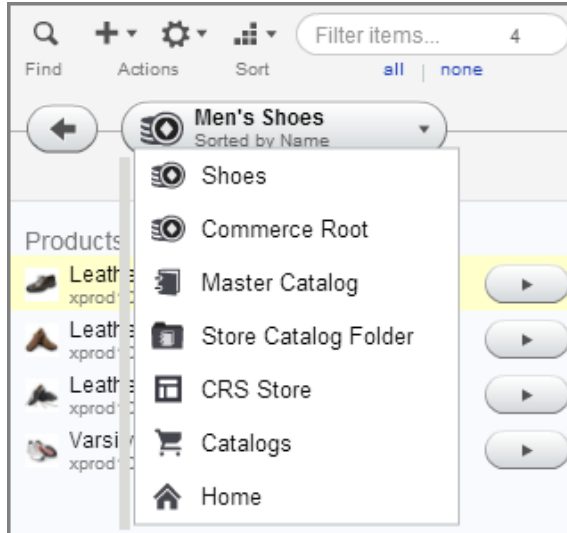
See Filtering Results (page 21) to learn how to narrow the list of child assets in the Browse panel so it contains only assets whose names include letters or words you specify.

Find Panel

Use the Find panel to search for assets that match criteria you specify. You begin a search by providing an asset type. You can search for all assets of that type, search for assets by name or ID, or further narrow the scope of your search with additional criteria, such as property values that must match the values set in the returned assets.
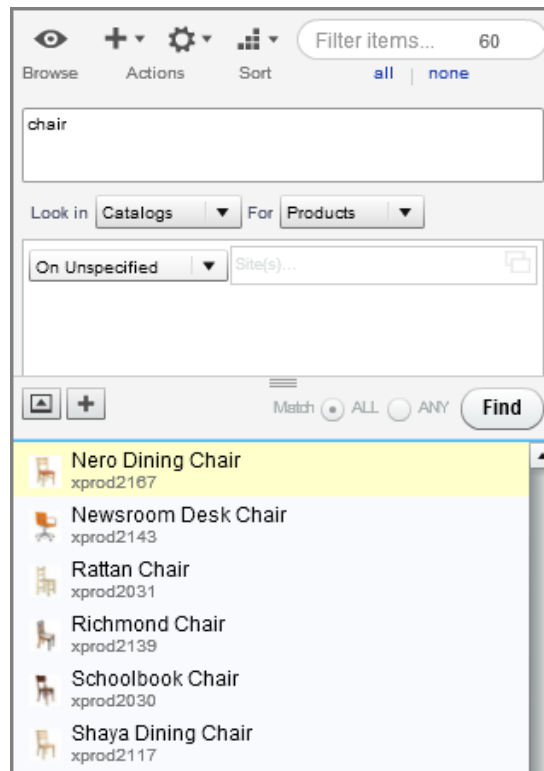
To search for assets in the Find panel:

1. Select an asset family from the Look In dropdown menu, then select an asset type from the For dropdown menu.

   For example, look in Catalogs for Products.
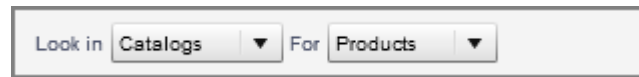
2. In a multisite environment, if you selected Catalogs or Content, specify which registered sites to search:

   • Unspecified: (default) Ignore the sites property when searching for assets.

   • This site: Search only for assets whose sites property matches a single site you select.

   • These sites: Search only for assets whose sites property matches one or more sites you select.

   • Any site: Search only for assets whose sites property contains at least one site.

   • No site: Search only for assets whose sites property is empty. See Unsited Items (page 32) for more information.

   For more information about registered sites, see Assets in a Multisite Environment (page 37).

3. Type or paste in full or partial asset names, IDs, or both.

   • Separate multiple entries with commas or line breaks

   • You can mix names and IDs in the same search criteria. For example, entering `glass, xprod2162` returns all items whose names include the word glass as well as the item whose ID is xprod2162.

4. (Optional) You can further narrow the search by clicking the + button and querying specific asset properties.

   The following example shows a query for all assets whose Brand property value ends with Home.
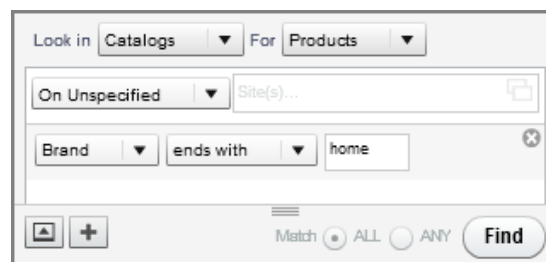
   You can narrow the search criteria further by clicking the + button again and providing more information about the desired asset. If you create multiple criteria, select a query operator.

   • Match ALL to return assets that match all the criteria you created.

   • Match ANY to return assets that match at least one criterion.

   To remove a criterion, click the corresponding x button.

   Note: Do not use the following comparison operators when you query an Article's Body property: `ends with`, `ends with (case sensitive)`, `is (exact match)`, `is not (exact match)`, `is one of`, and `is not one of`.

5. Click Find.

Your search results appear in a list at the bottom of the panel.

Criteria and results in the Find panel are cleared when you navigate away from Merchandising to another application, such as Targeting and Segmentation, and then navigate back to the Merchandising UI.

See Filtering Results (page 21) to learn how to narrow the list of search results so it contains only assets whose names include letters or words you specify.

Filtering Results

The Filter control lets you quickly narrow the contents of a child asset list in the Browse or Find panel and in the Project dialog box.

Begin by typing or pasting some text in the Filter control. The Filter control matches letters or numbers that you type, wherever they appear in the asset name or ID, not just at the beginning. Usually, as you type more characters, there are fewer matches. You can enter up to 50 characters. The counter displays the number of matches in the list.

Note: You can filter media content assets by media type as well as asset name and ID. For more information about media types, see *Creating and Managing Media Content* (page 91).

In the following example, the search results for `glass` include 15 products:
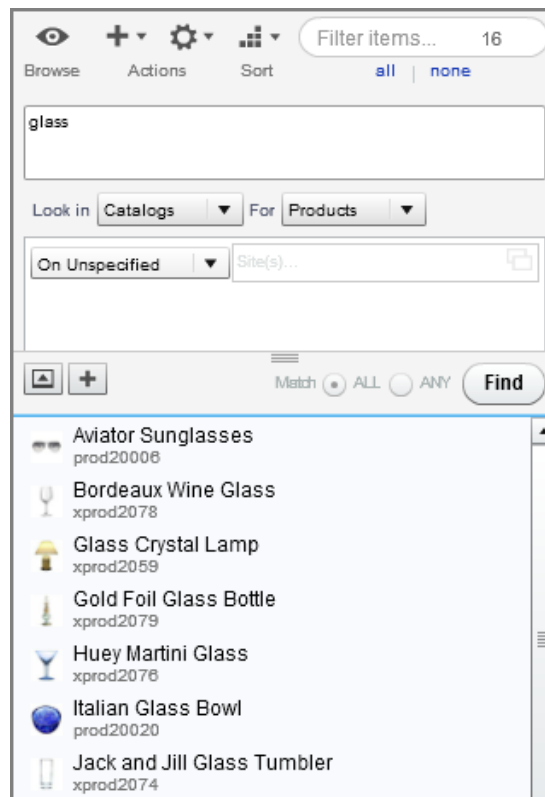
When you type `wine` into the Filter control, the search results list changes to include only the six products whose names include both glass and wine.
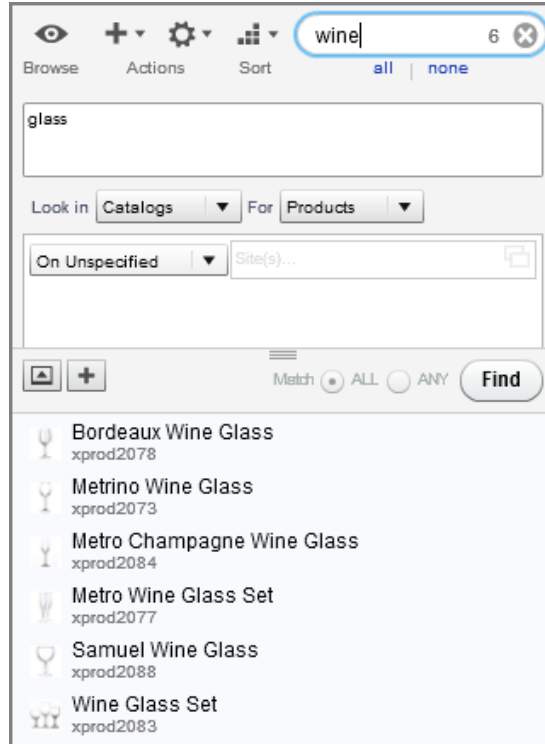
When you click the delete icon to clear the Filter control and type `2079`, the search results include the one product whose ID is xprod2079.
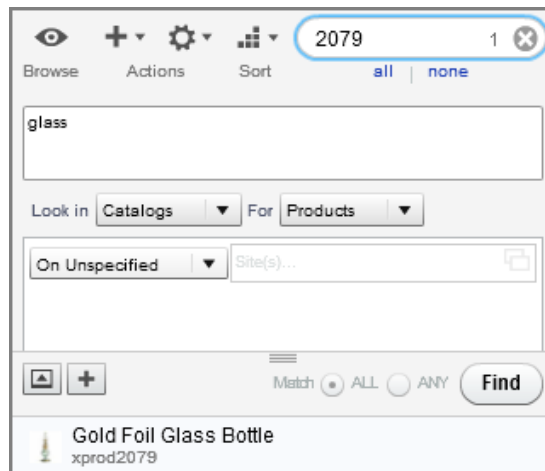
Using the Details Pane

When you select an asset in Merchandising, its properties appear in the Details pane, divided into tabs for easier viewing. You can select assets in the Navigation pane or from the Details pane of another asset; for example, you can select a parent category from a product. Regardless of how you access an asset, its Details pane displays the same information.

For more information, see *Creating and Managing Assets* (page 27).
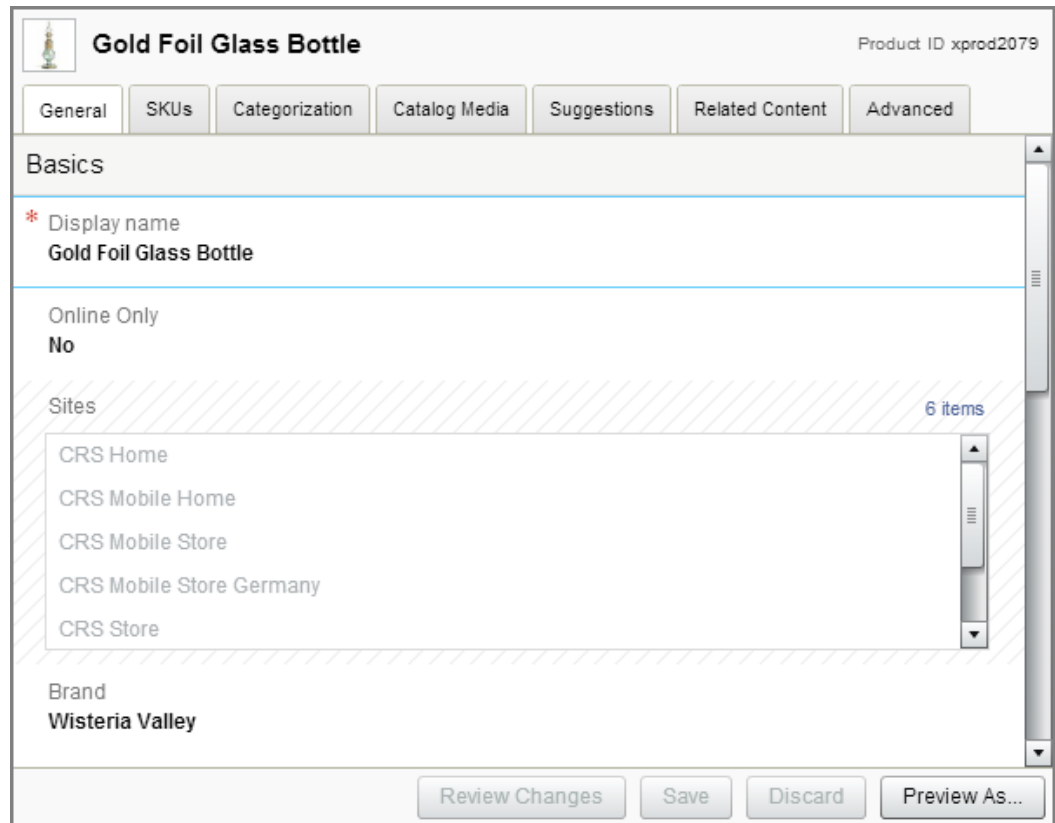
Using the Asset Tray

The asset tray that appears at the top of the Merchandising window bookmarks assets that you can organize and edit, for example, with Multi Edit operations. When the asset tray contains no assets, it appears as a thin bar at the top of the Navigation and Details panes.
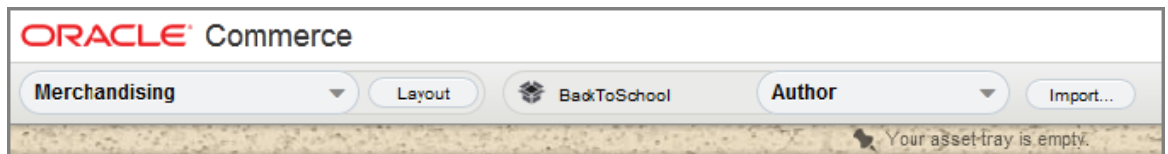
When you add assets to the asset tray, it expands to display the bookmarks:
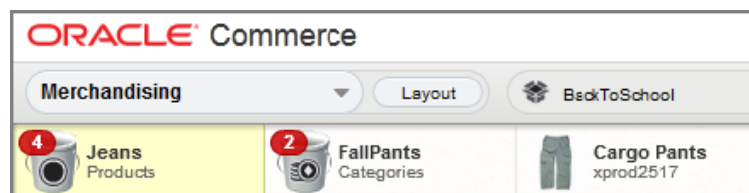
Adding Assets to the Asset Tray from the Navigation Pane

Adding assets to the asset tray does not add them to a project. Assets in the asset tray are added to a project only when they are changed, for example, if they are successfully updated as part of a Multi Edit operation. Assets remain in the asset tray when you log out of the Business Control Center or your session expires.

Note: To learn how to add assets to the asset tray in Layout view, see *Working with Visual Merchandising* (page 49).

To add assets to the asset tray:

1. In the Find or Browse panel, select the assets you want to edit. See Using the Navigation Pane (page 17) for details. When you add assets to the asset tray, child assets are not automatically selected.

2. Click the Actions button in the toolbar and select Add to Asset Tray.
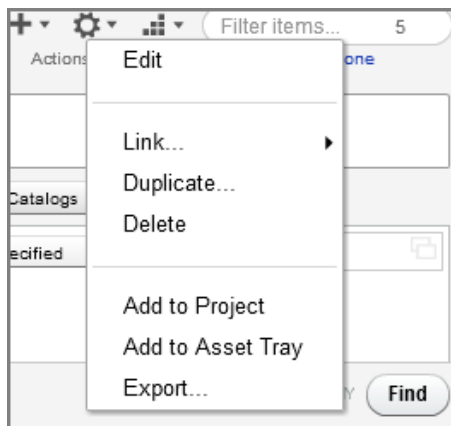
Alternately, you can drag the selected assets to the asset tray. For more information, see Tips for Dragging Assets to the Asset Tray (page 25) and Using Drag and Drop in Merchandising (page 46).

The asset tray expands and displays one or more tiles. Each tile represents one or more assets. By default, if you selected different types of assets, Merchandising automatically groups them by type. For example, if you drag both products and SKUs to the asset tray, two tiles appear; one contains the products and one contains the SKUs.

Note: Your administrator may have configured Merchandising so that each asset you add to the asset tray appears as a separate tile by default.

Each tile shows the number and type of assets it represents.

3. If a new tile represents a group of assets, enter a descriptive name for the tile. This name simply helps you keep track of assets in the asset tray; it does not become a property of any of the assets in the group. If you do not enter names for tiles, Merchandising automatically names them Untitled 1, Untitled 2, and so on.
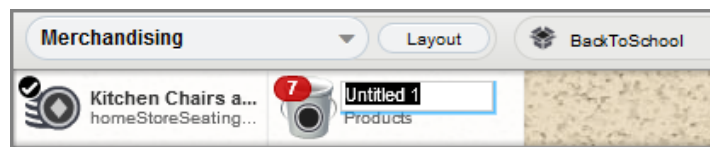
4. To remove a tile from the asset tray, move the mouse pointer over the tile until an X appears in its upper-right corner. Click the X.

Tips for Dragging Assets to the Asset Tray

Keep the following points in mind when dragging assets to the asset tray:

• When dragging multiple assets to the asset tray, you can add each asset as a separate tile by holding down the CTRL key as you drop the asset.

• If the asset tray already contains a tile that represents a group of assets, dragging one or more assets of that same type to the asset tray does not automatically add them to the existing group. Dragging the assets to a blank portion of the asset tray adds them as separate tiles or groups.

   To add these assets from the Find or Browse panel to an existing group, drag them to that group's tile.

   To group assets already in the asset tray, select one or more assets and drag them to the group. You can add both individual assets and other groups to a group.

   Remember that groups can contain only assets of the same type, such as products or SKUs.

• To reorder tiles, drag them to a new location in the asset tray.

• To link assets in the asset tray, select one or more tiles, hold down the CTRL key, and drag them to another tile. For example, to link a product to a category, drag the product tile to the category tile, hold down the CTRL key, and drop the product tile.

Using Assets in the Asset Tray

Once assets are bookmarked in the asset tray, you can easily access them to perform the following actions:

• Perform a Multi Edit operation on a tile that represents a group of assets. See Using Multi Edit (page 43).

• Edit the asset. Double-click the tile to display the Details pane for the selected asset in a separate window. See Working with Asset Properties (page 38).

• Link the asset to another asset in the Navigation pane or in the asset tray. See Tips for Dragging Assets to the Asset Tray (page 25), Linking and Unlinking Assets (page 29) and Using Drag and Drop in Merchandising (page 46).

• Add the asset to a collection in a collection editor. See Working with Collection Editors (page 39) and Using Drag and Drop in Merchandising (page 46).

Navigating a Project

The menu that appears at the top-left of the Merchandising window lets you quickly move to different parts of a project. To move to a different part of the project, or to leave Merchandising and return to the Endeca Workbench or the Business Control Center Home page, click the down arrow and select a location in the menu that appears.
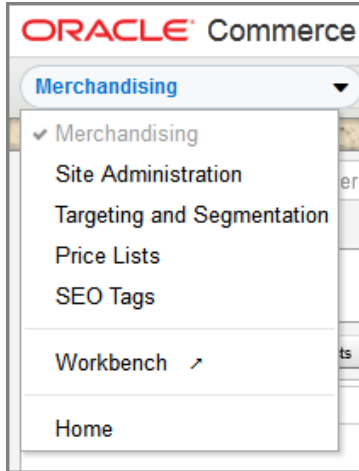
Note: The locations available in this menu depend on the permissions associated with your user profile. You may see more or fewer locations than shown in this illustration.

4   Creating and Managing Assets

This chapter provides an overview of creating and managing catalog assets in Merchandising. The seven chapters that follow this one describe how to create and manage each type of asset Merchandising supports.

Note: This chapter describes how to work with asset types available in Merchandising. To learn how to work with other types of assets, see the following chapters:

•   SEO tags: *Creating and Managing SEO Tags* (page 107)

•   Price lists: *Creating and Managing Price Lists* (page 165)

Creating New Assets

This section provides an overview for creating commerce assets. The chapters that follow this one describe how to create and manage each type of asset Merchandising supports, including catalog folders, catalogs, categories, products, SKUs, content folders, content items, promotions and coupons, store locations, catalog media folders, and catalog media items

To create a new asset:

1. In a Commerce Assets project, use the Browse panel to navigate to the asset that will be the new asset's parent. For example, to create a new product, navigate to the category where you want to create the product.

    See Using the Navigation Pane (page 17) for more information.

2. Click the Create button in the toolbar and select the type of asset you want to create.
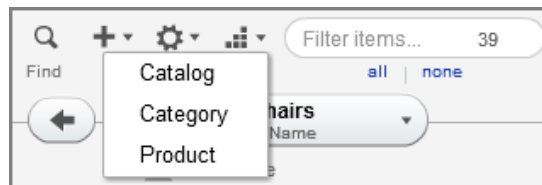
The list of asset types of you see depends on the following:

•   The permissions associated with your user profile. Talk to your administrator if you have questions about your permissions.

•   For catalog items, where you are in the catalog hierarchy in the left-hand Navigation pane.

For example, in the Browse panel, at the top level of a catalog, you can create a catalog or a category. If you drill down one more level, into a category, you can create a catalog, category, or product. See Browse Panel (page 18) for more information.

3. Fill in the property fields in the Details pane. Required fields are marked with a star. See Working with Asset Properties (page 38) to learn how to use the different types of Merchandising property editors.

4. Click Create.

   The new asset appears in the navigation pane. Depending on how your administrator configured Merchandising, a tile for the asset may also appear in the asset tray.

Creating Assets from the Find Panel

In addition to creating assets within a hierarchy on the Browse panel, you can also create assets from the Find panel. In the Find panel, you can create whatever type of asset is currently selected in the For dropdown menu.
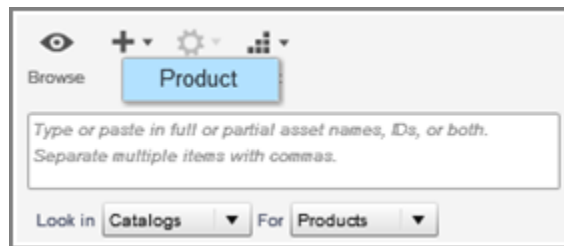
Unlike assets you create by selecting a parent in the Browse panel, most assets you create from the Find panel do not automatically have a parent asset specified in the Details pane. Unless you specify a parent, Merchandising creates the asset in a default location that may not be where you expect. See the chapters that follow this one for information about the default location for each type of newly created asset.

Duplicating Existing Assets

It is sometimes easier to duplicate an existing portion of your catalog than to create individual assets one at a time. For example, in a multisite environment, you might need to create several catalogs that share characteristics like structure and product set, but use different price lists. In this case, copy a catalog from one site to another and modify the property values as needed.

For example, a copy of a category includes copies of all that category's children, organized in the same hierarchy as the original. The default name Merchandising gives a duplicate asset is the name of the original followed by `(copy)`, though your administrator might have customized Merchandising to use a different format.

The duplicate asset is not an exact copy of the original. By default, almost all the properties you can work with in Merchandising are copied. Some properties, such as the creation date, are not copied. Your administrator can control which properties are copied to the duplicate asset.

A duplicate is completely independent of the asset you copied it from; changes made to one do not affect the other. However, any child assets, which retain their hierarchy in the duplicate asset, are links to the original

child assets. If you change a property value in one of the original asset's children, that change is visible in the duplicate asset's child. When you duplicate price list folders or media folders that contain child assets, those child assets are also duplicated, not links of the original child assets.

To duplicate assets:

1. In a Commerce Assets project, select the assets you want to duplicate. See Using the Navigation Pane (page 17) for details.

2. Click the Actions button in the toolbar and select Duplicate.
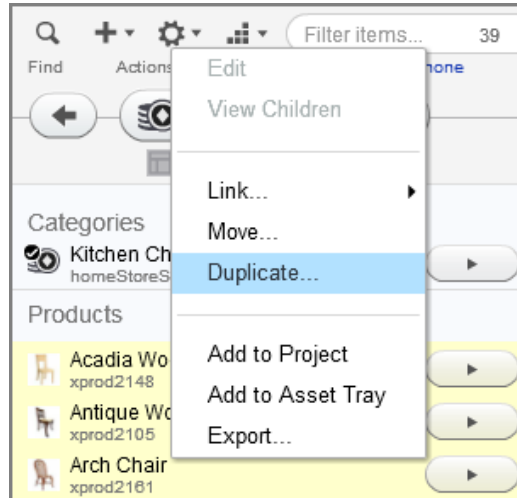
3. In the dialog box that appears, select the parent asset that will contain the duplicates. See Using the Navigation Pane (page 17) for details.

4. Click OK.

Linking and Unlinking Assets

Linking a catalog asset associates it with a parent asset. Linking is useful when you want a product to appear in multiple catalogs or categories. For example, suppose your catalog contains a product called Gas Hibachi in the Outdoors category. To make this product also appear in the Father's Day Gifts category, simply link it to that category.

Linked assets have multiple parents: one parent for each location. When you make a change to the asset in one location, that change is reflected in all locations.

Note: You cannot link or unlink media assets, content assets, promotions, coupons, SEO tags, store text, store locations, or price lists.

Linking Assets

To link assets to another parent:

1. In a Commerce Assets project, select the assets you want to link. See Using the Navigation Pane (page 17) for details.

2. Click the Actions button in the toolbar and select Link > Link.
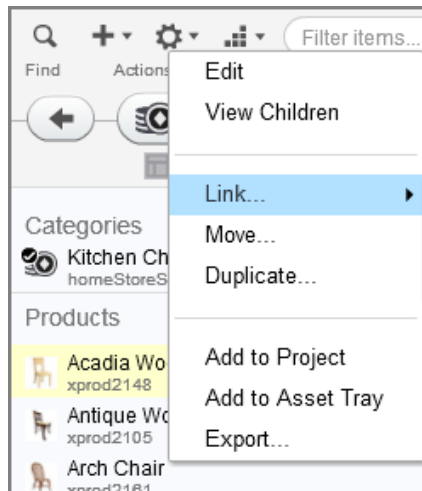
3. In the dialog box that appears, select a parent catalog or category. See Using the Navigation Pane (page 17) for details.

4. Click OK.

Unlinking Assets

Unlinking breaks the association between an asset and a parent. You can unlink an asset from a single parent or from all its parents. If you unlink an asset from all its parents, Merchandising moves it and all its children to the Uncategorized Items list or, in a multisite environment, to the Unsited Items list. For more information, see Uncategorized and Unsited Items (page 31).

To unlink an asset from one or all parents:

1. In a Commerce Assets project, select the assets you want to unlink. See Using the Navigation Pane (page 17) for details.

2. Click the Actions button and select Link.
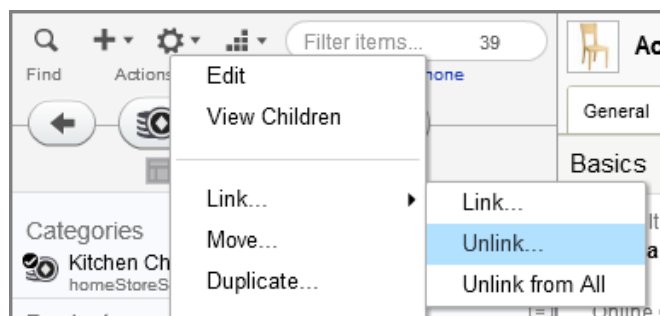
3. Select one of the following:

- Unlink… to remove the asset from the selected parent only.

- Unlink From All… to remove the asset from all locations in the catalog hierarchy.

4. In the Confirm Unlink dialog box, review the associations that unlinking will break. Click Unlink to unlink the asset.

Uncategorized and Unsited Items

Catalog assets that are not linked to any parent in the catalog hierarchy appear in a separate list at the top of the Catalogs list in the Browse panel:

- In an environment with no registered sites (default), these items appear in the Uncategorized Items list.

- In a multisite environment, these items appear in the Unsited Items list.

You can view and work with uncategorized and unsited assets just as you do any other catalog asset: Open the list and double-click an asset to display its properties.

You cannot create new assets in the Uncategorized Items or Unsited Items list, and you cannot drag assets into it.

To move assets out of the Uncategorized Items or Unsited Items list, link them to a parent in the catalog hierarchy. See Linking and Unlinking Assets (page 29) for more information.

Uncategorized Items

Uncategorized items are categories, products, or SKUs that are not linked to any parent in the catalog hierarchy, that is, they are not associated with any catalogs. Uncategorized items do not appear in the navigation for your Web site, and visitors cannot search for them unless your administrator specifically configures your site to allow uncategorized items to appear in search results.

A category, product, or SKU becomes uncategorized when one of the following happens:

- It has been unlinked from all parents with the Unlink or Unlink All command.

- Its ancestor has been unlinked from all parents. For example, a product whose only parent category is an uncategorized item is also uncategorized. Any of the product's children, such as SKUs associated with the product, become uncategorized, too.

- It is imported into Merchandising through an external data feed. This usually applies only to products and SKUs, since they are the assets most likely to be imported.

- It is created from the Merchandising Find panel. For more information, see Creating Assets from the Find Panel (page 28).

Unsited Items

In a multisite environment, unsited items are catalog folders, catalogs, categories, products, or SKUs that have no site membership, that is, they are not associated with any of the environment's registered sites. Unsited items do not appear in the navigation for your Web sites, and visitors cannot search for them unless your administrator specifically configures your sites to allow unsited items to appear in search results.

A catalog, category, product, or SKU becomes unsited when:

- It has been unlinked from all parents on all sites with the Unlink or Unlink All command.

- Its ancestor has been unlinked from all parents. For example, a product whose only parent category is an unsited item is also unsited. Any of the product's children, such as SKUs associated with the product, become unsited, too.

- It is imported into Merchandising through an external data feed. Products and SKUs are the assets most likely to be imported though a feed.

- It is created from the Merchandising Find panel. For more information, see Creating Assets from the Find Panel (page 28).

Moving Assets

Moving an asset changes the structure of your catalog by changing the parent of the asset you move. For example, you can move a product from the Uncategorized Items list to a category in the catalog.

You can move more than one asset at a time, but you must move them all to the same destination. Any child assets are also moved.

To move assets:

1. In the Browse panel, select the assets you want to move. (You cannot move assets in the Find panel.) See Using the Navigation Pane (page 17) for details. Remember that any child assets are also automatically selected.

   You can also select media assets, promotions, promotion folders, coupons, and coupons folders in the Find panel.

2. Click the Actions button in the toolbar and select Move.

3. In the dialog box that appears, select a new parent asset. See Using the Navigation Pane (page 17) for details.

4. Click OK.

Previewing Assets

Merchandising lets you preview assets so you can see how your changes will appear on your live Web site. Preview functionality must be set up by your administrator. If your administrator has not enabled preview, the Layout and Preview buttons do not appear in the Merchandising user interface.

Note: If your administrator enabled the Visual Merchandising features, you can edit assets directly from the preview session. For more information, see *Working with Visual Merchandising* (page 49).

To launch a preview session at any time from Merchandising, complete the following steps:

1. Click the Layout button at the top of the Merchandising window.
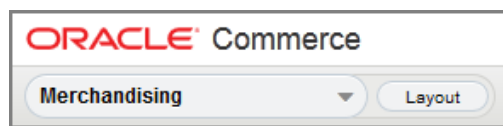
The preview session launches immediately, using the default landing page, preview user, and site that your administrator configured when he or she enabled preview. The preview session replaces Merchandising in the browser window.

2. To change the landing page, user, site, or preview date and time, see Changing Options in a Preview Session (page 34).

3. To close the preview session and return to Merchandising, click the Data button.
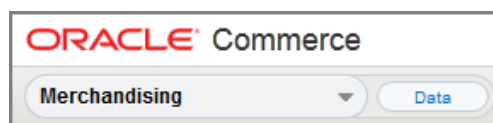
To launch a preview session while editing an asset, complete the following steps:

1. Select the asset you want to preview. See Using the Navigation Pane (page 17) for details. If you want to preview an asset you are currently working on, make sure you save your changes.

2. Click the Preview As button at the bottom of the Details pane.

   Preview As opens the Preview Launcher dialog box, where you select a preview user whose profile you use to view the page, a preview landing page, and in a multisite environment, a preview site:

   • Preview User: The user profile you use to view the page.

   • Preview Site: In a multisite environment, the site on which to view the page.

   • Preview Landing Page: The Web site page to preview.

Preview Launcher

Creates a dynamic preview of your changes on a specific Landing Page on your production site, customized for the Preview User you select.

Preview User	Preview Site	Preview Landing Page
Anonymous User	CRS Home	Home Page
Eric Adams	CRS Mobile Home	Product Detail Page
Kim Anderson	CRS Mobile Store	Promotions Page
Erica Clark	CRS Mobile Store Germany	
Alex Jackson	CRS Store	
Brandon Johnson	CRS Store Germany	
Vincent Lee		
Victoria Lewis		
Maria Lopez		
Anna Mitchell		
Lindsay Moore		
Lisa Moore		
Peter Nelson		
Anna Parker		
Adrian Robinson		

Launch   Cancel

3. Click Launch to start a preview session that uses the selected landing page, user profile, and optionally, site.

After you launch a preview session from an asset in the Details pane, its properties window displays a combination Preview / Preview As button:

•   **Preview** starts a new preview session using the user profile, landing page, and site settings from the last preview session launched from that asset.

•   **Preview As** opens the Preview Launch dialog, where you can change preview settings before launching a new preview session.

•   To close the preview session, click the Data button.
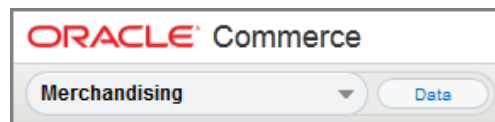
Changing Options in a Preview Session

In each preview session, the Preview toolbar appears at the top-of the browser window.

Use these controls to change preview options while you are in the preview session:

- **User/Site** displays the Preview Launcher dialog, where you can select a different landing page, user profile, and optionally, site for the preview session.

- **Date/Time** displays the Preview by Date/Time dialog, where you can select a different date and time for the preview session.

- **Promotions** displays the Promotions Visibility window. For more information, see Previewing and Testing Promotions (page 56).

Note: Changes to Preview options are not saved when you log out of Merchandising.

Changing the Date and Time for a Preview Session

You can choose to preview how your site would look if your changes were deployed right now or at a future date and time. For example, suppose you are working on a seasonal microsite that will not go live until next month. If you set the preview date to the go-live date (specified by the assets' Start Date property), you can see how your site will look on the day of the launch.

To change the date and time for a preview session, complete the following steps:

1. Click the Date/Time icon in the Preview toolbar to display the Preview by Date/Time dialog.

2. To preview assets as they will appear at a future date and time, click the calendar and select a date. Use the up and down arrows to set the hour, minute, and AM/PM portions of the time.

    Note: The date and time are evaluated based on the date and time on the server.

    To preview assets as they appear right now, click the Now button.

3. Click Set Date/Time.

    The Preview toolbar changes to show the new preview date and time and to remind you that you are previewing assets as they will appear on that future date.

4. (Optional) To set the Preview date and time back to Now, click the X icon in the Date/Time control.

Reviewing Changes

Merchandising lets you review changes to assets by comparing an asset you are working on with the most recently checked-in version of that asset. You can optionally undo individual changes.

To review changes to an asset, complete the following steps:

1. In a Commerce Assets project, select the asset whose changes you want to review. See Using the Navigation Pane (page 17) for details.

    Tip: You must save your changes before you can review them. Assets with saved changes are marked with a check mark badge when you view them in the Browse pane. All the products in the following illustration have saved changes:
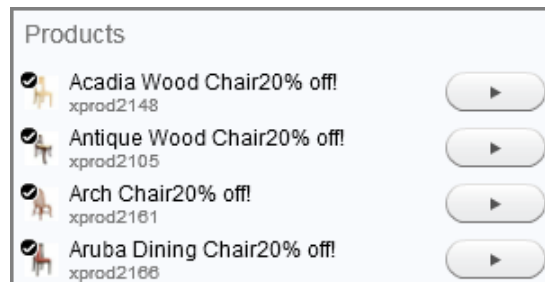
2. Click the Review Changes button at the bottom of the Details pane.
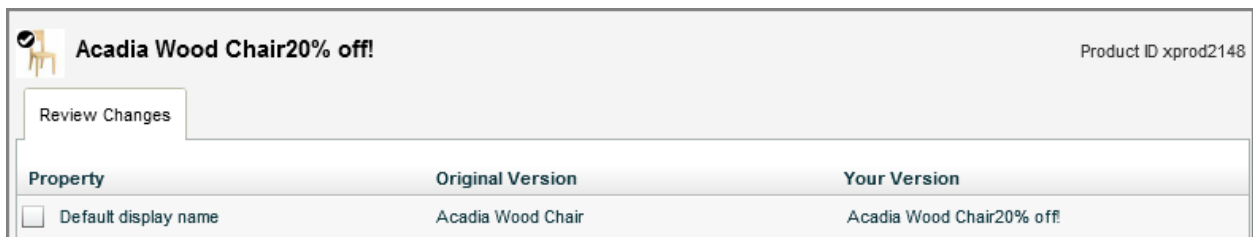
3. (Optional) To undo a change, click the checkbox next to the name of a changed property, then click Revert Selected Changes.

4. Click Close when you are finished reviewing the asset.

Deleting Assets

When assets are no longer used on your sites, you can remove them from the system.

When you delete an asset before its project has been deployed, the asset is immediately removed from Merchandising and the underlying database. The chapters that follow contain details about deleting particular types of assets.

To delete an asset that has already been deployed, you must create a new project for deleting the assets and then deploy that project. See the *Content Administration Guide for Business Users* for information about deleting deployed assets from the system.

To delete an undeployed asset:

1. In the Find panel, select the assets you want to delete. (You cannot delete assets in the Browse panel.) See Using the Navigation Pane (page 17) for details. Remember that any child assets are also automatically selected.

2. Click the Actions button in the toolbar and select Delete.

3. Click OK to delete the asset.

Deleting Parent Assets and Linked Assets

When you delete a parent asset, such as a category that contains products, the child assets move to the Uncategorized or Unsited Items list, retaining their hierarchical relationships to each other. The only exception is deleting a catalog folder that contains another catalog folder; in this case, the child folder moves to the root level of the catalog. See Uncategorized and Unsited Items (page 31) for more information.

When you delete a linked asset, the asset is removed from all parents. See Linking and Unlinking Assets (page 29) for more information.

Assets in a Multisite Environment

In a multisite environment, your administrator associated specific catalog assets (catalogs, catalog folders, categories, products, and SKUs) with specific registered sites. The Sites property on an asset's General tab in the Details pane shows you which registered sites this asset belongs to.
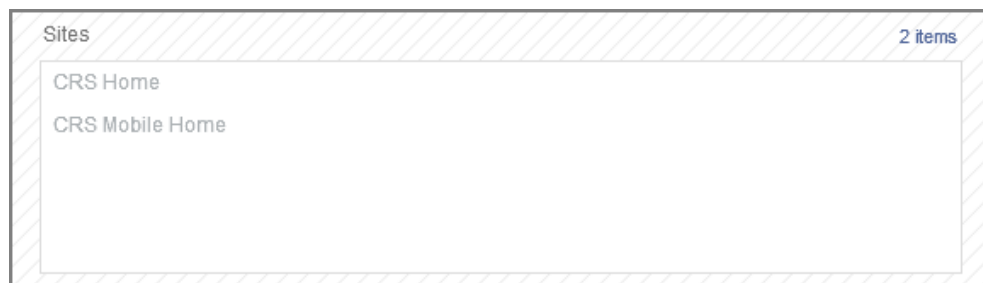
You cannot directly edit the Sites property for a catalog asset, but you can associate assets with different registered sites by linking or moving them. See Linking and Unlinking Assets (page 29) and Moving Assets (page 32).

Promotions, articles, and media content assets also have Sites properties. Your administrator does not have to associate these assets with specific registered sites. By default, promotions, articles, and media content assets are available to all sites. You can directly edit the Sites property for these assets. See *Creating and Managing Promotions and Coupons* (page 125) , *Creating and Managing Articles* (page 87), and *Creating and Managing Media Content* (page 91) for more information.

Working with Asset Properties

As you work with assets, you will need to create and edit their property values in the Details pane. Merchandising includes a number of property editors that you use to add and edit asset properties.

Note: For information about working with the light table property editor, see Organizing Collections with the Light Table (page 53).

Working with Text Editors

A text editor lets you work with short, unformatted strings, such as product names.

To add or edit text in a text editor, complete the following steps:

1. Click the editor.

2. Type or paste text into the box.

3. (Optional) Set other property values in the Details pane.

4. Click the Create or Save button at the bottom of Details the pane when you have finished your changes.

Working with HTML Editors

Merchandising includes an HTML editor called CKeditor that you can use edit and apply rich-text formatting to large string properties, such as a product's long description, an article's body, or store text.
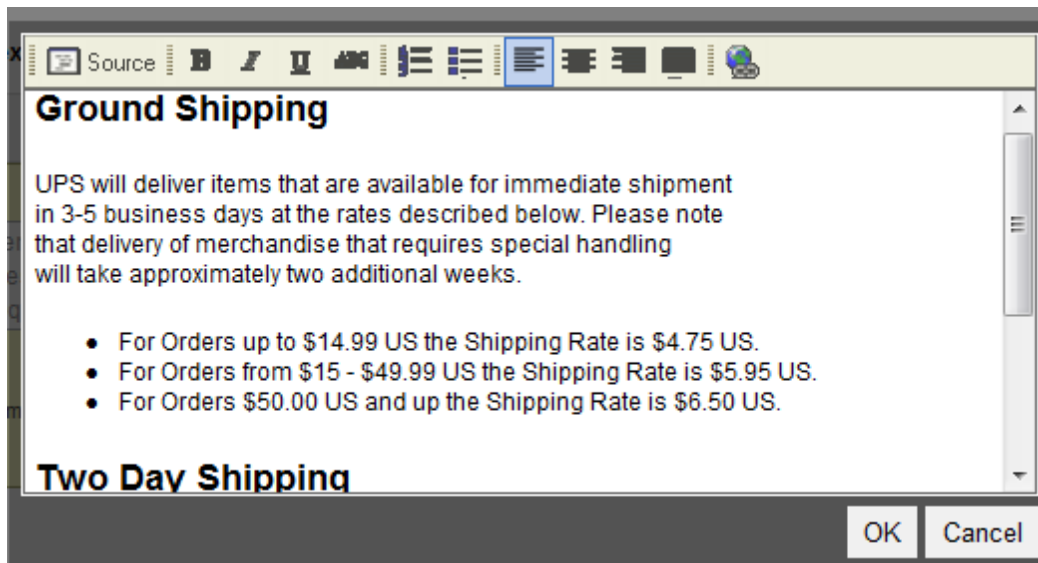
The editor provides both WYSIWYG and HTML source code views.
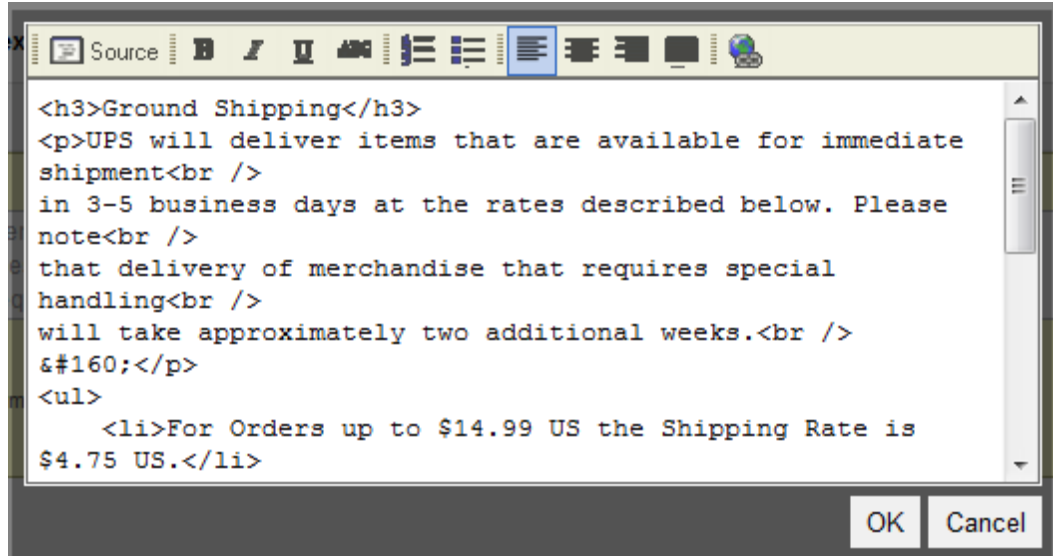
CKeditor is installed automatically with the Oracle Commerce Platform applications that require it. Detailed documentation for the editor is available on the CKSource Docs Web site.

To add or edit text in the WYSIWYG editor, complete the following steps:

1. In the Details pane, click the property you want to edit.

2. Click the Edit button to launch the editor.

3. Enter, paste in, or edit text.

4. Use the icons at the top of the editor to format, size, and align the text.

5. To edit the HTML code, click Source. To switch back to WYSIWYG view, click Source again.

6. (Optional) Set other property values in the Details pane.

7. Click the Create or Save button at the bottom of Details pane when you have finished your changes.

   Note: Formatting you applied may not appear in the Details pane once your changes have been saved.

Working with Collection Editors

A collection editor lets you work with collection properties, such as a category's list of fixed child products. You can add and remove assets from a collection, edit existing assets in the collection, or change the order of assets in the collection.

Merchandising includes editors for ordered and unordered collections. Each asset in an ordered collection has a specific position in the collection.

An unordered collection can be a simple list of assets, like a catalog's root categories, or a map of key-value pairs, like the translations that appear on a product's Advanced tab when Commerce Reference Store is installed. The items in unordered collections appear in alphabetical order in Merchandising and you cannot reorder them.

To work with assets in a collection editor, complete the following steps:

1. Click the editor to activate it.

2. Perform one of the following tasks:

   Creating New Assets in a Collection (page 41)

   Adding Existing Assets to a Collection (page 41)

   Editing Assets in a Collection (page 41)

   Removing Assets from a Collection (page 41)

   Reordering Assets in a Collection (page 42)

3. Click the Save button at the bottom of the Details pane when you finish your changes.

Creating New Assets in a Collection

Creating a new asset from a collection editor automatically adds the asset to the project.

To create a new asset in a collection, complete the following steps:

1. In the collection editor, click the + button and fill in the property fields in the window that appears. See Creating New Assets (page 27) for more information.

2. Click Create.

   The new asset appears as the first item in the collection. In an unordered collection or map, saving your changes reorders the collection alphabetically.

Adding Existing Assets to a Collection

Adding assets to a collection automatically adds them to the project.

To add existing assets to a collection, complete the following steps:

1. In the collection editor, click the Select button and use the Navigation pane window that appears to browse to or search for assets.

   The new assets appear at the top of the collection. In an unordered collection or map, saving your changes reorders the collection alphabetically.

2. Alternately, you can drag existing assets from the Navigation pane or the asset tray and drop them in the collection editor.

   If you drag assets to an ordered collection, a horizontal line appears at a potential drop location when you hover over it.

   If you drag assets to an unordered collection, the new assets appear at the top of the collection. Saving your changes reorders the collection alphabetically.

Editing Assets in a Collection

Editing assets in a collection editor automatically adds them to the project.

To edit an asset in a collection, complete the following steps:

1. In the collection editor, click the asset's Display Name and fill in the property fields in the window that appears. See Creating New Assets (page 27) for more information.

2. Click Save.

Removing Assets from a Collection

Removing an asset from the collection does not remove it from the system. Removing an asset from a collection automatically adds it to the project.

To remove an asset from a collection, complete the following steps:

1. In the collection editor, remove one or all assets from the collection:

   - To remove one asset, click the X at the end of the asset row.

   - To remove all assets from the collection, click Clear All.

Reordering Assets in a Collection

Each asset in an ordered collection has a specific position in the collection. Reordering a collection does not add the reordered assets to the project.

To change the order of assets in a collection, complete the following steps:

1. To move an asset to a new position in the collection, change the number in the Order column and click the Reorder button.

   Enter a number from 1 to the number of assets in the collection. If the number you enter is greater than the number of assets in the collection, Merchandising moves the asset to the end of the list.

2. To move an asset to the top of a collection, click the arrow icon at the beginning of the asset's row.
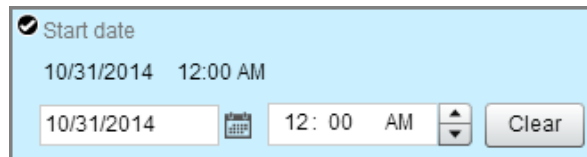
You can also drag one or more assets to a new position in the list:

1. Select one or more assets in the collection editor. If you select multiple assets, they do not have to be contiguous.

2. Drag the assets to a new position in the collection and drop them. (A horizontal line appears at a potential drop location when you hover over it.)

   Merchandising automatically changes the order numbers to reflect the reordered collection.

Working with Calendar Editors

A calendar editor lets you work with date and time properties, such as a start and end dates.

To set date and time, complete the following steps:
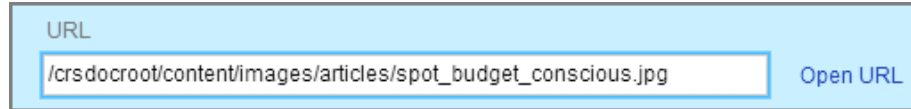
1. Click the editor.

2. Click the calendar icon and select a date.

3. (Optional) If the editor also includes a time, use the up and down arrows to set the hour, minute, and AM/PM portions of the time.

   If a time editor is available and you do not specify a time, when you save your changes, Merchandising saves the time as the system time on your computer; that is, the computer where you are accessing Merchandising through a web browser, not the publishing server where Merchandising is installed.

4. (Optional) Set other property values in the Details pane.

5. Click the Create or Save button at the bottom of Details pane when you have finished your changes.

Working with URL Editors

A URL editor lets you work with URLs that point to media content assets, such as videos, audio clips, images, and PDF files.

To add or edit a reference in a URL editor, complete the following steps:

1. Click the editor.

2. Type or paste a URL into the box. See *Creating and Managing Media Content* (page 91) for more information.

   Depending on how your administrator configured Merchandising, the box might contain a partial URL that points to a server where the assets are stored.

3. To test the URL, click Open URL.

   The file specified by the URL appears in a new browser window. If Merchandising cannot access the file, your browser displays an error in the new window.

4. (Optional) Set other property values in the Details pane.

5. Click the Create or Save button at the bottom of Details pane when you have finished your changes.

Using Multi Edit

Multi Edit lets you apply the same change to multiple assets at the same time. For example, you could use Multi Edit to:

- Add products to the Clearance category on a weekly basis.

- Activate a New Color flag for a newly-added group of shoe SKUs and deactivate the flag for older SKUs.

- Add the phrase "New for Fall!" to the beginning of the long description for a list of products.

You can use Multi Edit with catalog assets, promotion folders, promotions, coupons, content assets, and media assets. You cannot use Multi Edit with price lists, sites, site groups, or targeting and segmentation assets.

Editing Assets in a Multi Edit Operation

Multi Edit applies your change to the property for all items in the Assets list. Multi Edit does not change the values of properties you do not specifically edit.

The same restrictions that apply to editing properties individually also apply to Multi Edit operations. For example, you cannot edit read-only properties, like a product's Sites collection, or properties that your profile's roles do not allow you to view or edit. Additionally, you cannot use Multi Edit to change the following asset properties:

- Properties (other than strings) that must be unique. You can prepend or append text to a unique string property.

- The following Promotions properties: Template, Condition and offer, Promotion upsells

- The following Coupon Batch properties: Code prefix and Number of coupons

- Coupon IDs for Coupons

- The following Stacking Rules properties: Stacking rule combinations and all properties on the Promotions tab

- The following Products and SKUs properties: All properties on the Price Lists tab

- Cascade-delete properties that are single references to other assets or collections of other assets

To edit assets in a Multi Edit operation, follow the steps below:

1. Add the assets you want to update to the asset tray. See for more information.

2. Double-click the tile stack to open the Multi Edit window.

   The window is divided into two parts: A list of assets in this operation is on the left and the Details pane for assets of this type is on the right.
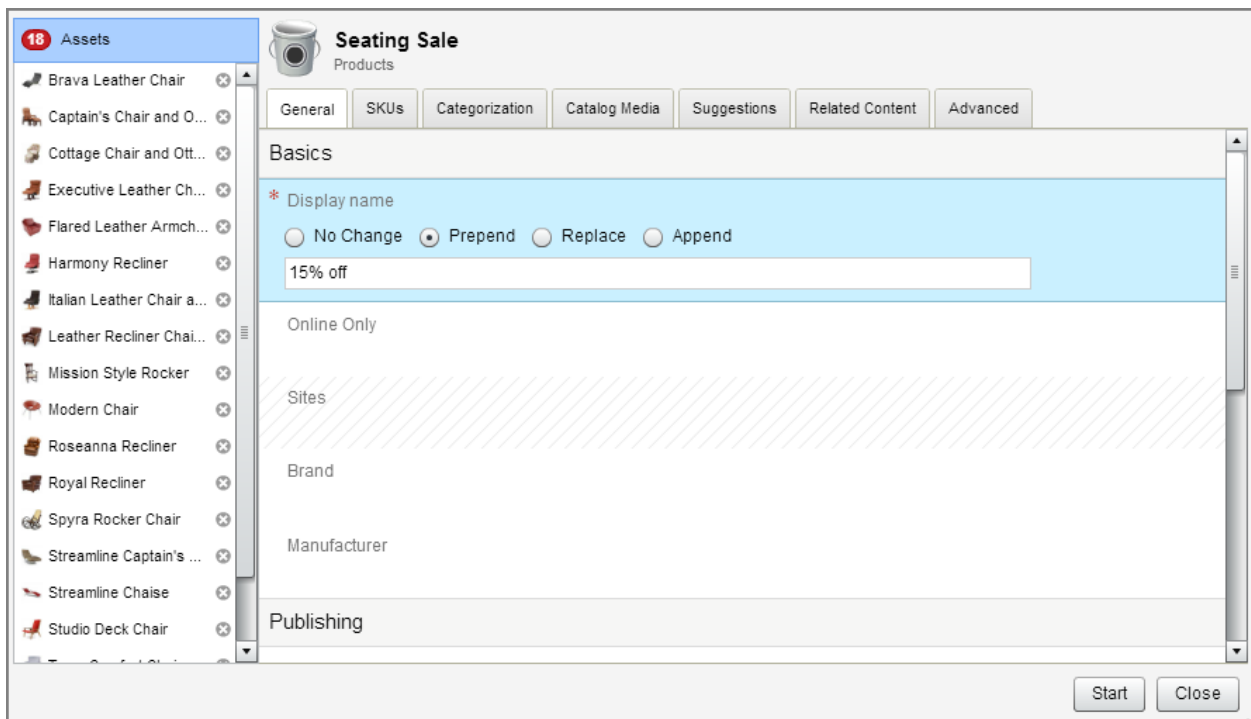
3. Click a property editor in the Details pane and select the type of change you want to make.

   - No Change: Leaves the property's current value unchanged. This is the default selection for all property editors.

   - Prepend: Adds your change to the beginning of the existing property value

     For example, you could add the phrase "20% off!" to the beginning of the Default Display Name or add five SKUs to the beginning of the Fixed Child SKUs collection.

   - Replace: Replaces the existing property value with your change

     For example, you could replace an existing Fixed Child Products collection with other products you select or new products you create.

- Append: Adds your change to the end of the existing property value

  For example, you could add the phrase "Buy 2 get 1 free" to the end of the Default Display Name or add five products to the end of the Fixed Child Products collection.

- Erase: Removes the existing property value. This option is not available for all properties, for example, it is not available for required properties.

4. Specify a property value, unless you selected Erase in the previous step. For details about using each type of property editor, see Working with Asset Properties (page 38).

5. Click Close to close the window and make more changes later or click Start to run the Multi Edit operation.

   When you close the window, any changes you made are saved in the Multi Edit tile as long as the tile is available in the asset tray.

   For information about starting the operation, see the next section, Running a Multi Edit Operation (page 45).

Running a Multi Edit Operation

Once you finish editing properties, run the Multi Edit operation to apply your changes and save them, which automatically adds them to the project. Assets that could not be modified are added to the project.

To run a Multi Edit operation:

1. Open the tile whose Multi Edit operation you want to start.

2. Click Start.

   The Multi Edit window closes and Merchandising starts the operation. A progress bar appears on the tile.

   You can continue working in Merchandising while a Multi Edit operation runs.

3. (Optional) To cancel the operation, click the Stop icon at the top-right in the Multi Edit tile.

   If the operation includes relatively few assets or updates, it might complete before you can stop it. In this case, the easiest way to undo the changes is to remove the assets from the current project. For more information, see Removing Assets from a Project (page 8).

   You cannot undo changes made by a Multi Edit operation.

4. When the operation finishes, you can open the tile and view the results. For more information, see the next section, Viewing Multi Edit Reports (page 45).

Viewing Multi Edit Reports

When a Multi Edit operation completes, its tile changes to reflect the status of the operation. If all assets were successfully updated, the tile displays a check mark. If some or all assets could not be updated, the tile displays a warning icon. Open the tile to view a report that displays the results of the operation.

To view a Multi Edit report:

1. Open the Multi Edit tile whose report you want to view.

   The report is divided into a number of categories, each on its own tab.

- Failed. These assets were not changed, saved, or added to the project because the suggested edits cased errors. Each asset on the Failed tab is followed by a description of the problem that caused the failure.

- Updated. These assets were successfully changed, saved, and added to the project.

- Unchanged. These assets already had the suggested property values so no change was necessary. These assets were not saved or added to the project.

- Cancelled. The Multi Edit operation was stopped before Merchandising could update these assets. These assets were not changed, saved, or added to the project.

The report includes tabs only for categories that have assets in them. For example, if all assets were successfully updated, the report contains only the Updated tab.

2. To fix assets that appear on the Failed or Cancelled tab, copy and paste their IDs from the report to the Find Panel (page 19) in the Navigation pane, then search for them.

   You can edit the assets one at a time from the search results list, or add them to a new Multi Edit operation.

3. When you finish reviewing the report you can remove it from the asset tray permanently by clicking the X in the upper-right corner of its tile.

You cannot save Multi Edit reports. If you add assets to a tile while it still contains a Multi Edit report, Merchandising gives you the option of removing the existing report and adding the assets or keeping the report and not adding the assets.
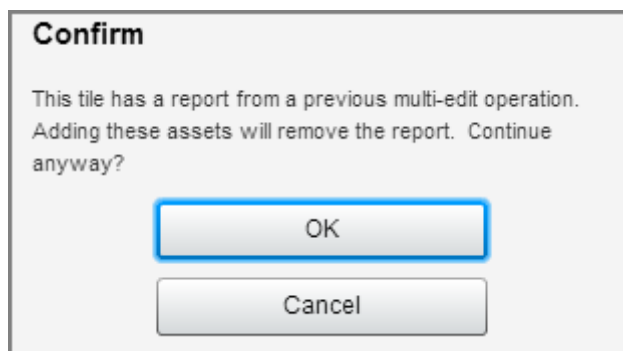
Using Drag and Drop in Merchandising

You can drag and drop assets in Merchandising to simplify moving, linking, and adding actions. For example:

- Drag a promotion from the Promotions Visibility window to the asset tray. See Previewing and Testing Promotions (page 56) for more information.

- Drag a number of products from the Find panel to the asset tray for a Multi Edit operation. See Using the Asset Tray (page 23) for more information.

- Add one or more assets to a collection. For example, add several products to a category by dragging the products from the Search Results list in the Find panel to the Fixed Child Products collection of the category currently displayed in the Details pane. See Working with Collection Editors (page 39) for more information.

- Link several products to another category by dragging them from the asset tray. See Using the Asset Tray (page 23) for more information.

- Change the order of assets in a collection by dragging one or more selected assets to a new position in the list.

- Drag a product currently displayed in the Details pane to a different category in the browse panel to move the product to that category.

- Replace a product's thumbnail image by dragging an image file from the Media folder in the browse panel to the product's Thumbnail image property in the Details pane.

- Link several categories in one catalog to a catalog on a different site by dragging them in split-screen view.

- Add or replace an asset in a single-reference property editor. For example, drag a category template from the Media folder in the Browse panel to the Template property editor of the category currently displayed in the Details pane.

To drag and drop assets from the navigation pane:

1. (Optional) Click the splitter button in the lower left-hand corner of the Merchandising window to show a second view of Merchandising.

2. Find or browse to assets you want to work with. See Using the Navigation Pane (page 17).

3. Select the assets to drag.

   By default, dragging assets moves them. To link instead of move, select the assets and press the CTRL key.

   Note: You cannot link promotions, coupons, and media assets.

4. Drag the assets to the new location and release the mouse button to drop them.

   A highlight appears around a potential drop location when you hover over it and the drag pointer displays a green plus sign.
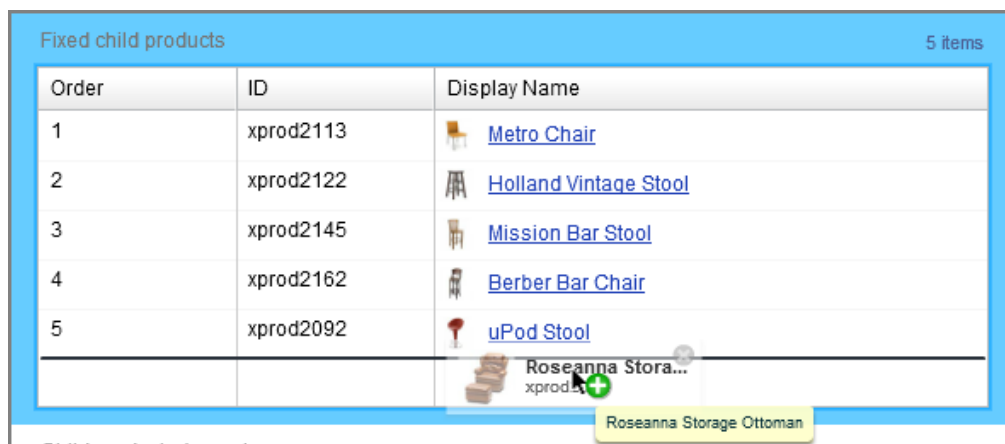
5. To stop the current drag action, press the ESC key or simply release the mouse while the curser is not on a drop target.

5 Working with Visual Merchandising

Visual Merchandising lets you select assets to organize and edit directly from a preview session. As with any changes you make in Merchandising, all changes you make with Visual Merchandising become part of a project so other users cannot see the changes until they are published.

Visual Merchandising Basics

The following are some key terms that you need to be familiar with when you work with Visual Merchandising:

- **Layout view** is an editable preview session that is available when both preview and Visual Merchandising are configured in your environment. For more information, see UI Overview (page 49).

- **Light table** is a visual collection editor that you use to reorder a category's fixed child products list. For more information, see Organizing Collections with the Light Table (page 53).

- The **Preview toolbar** appears at the top of the layout view window and includes buttons that let you

Before You Begin

Visual Merchandising provides a visual, intuitive way to organize assets and select them for editing. Although the light table and layout view look and behave different from the traditional Merchandising user interface, the underlying functionality is the same. For example, reordering a collection with the light table or in the collection editor in a product's Details pane yields the same result.

This chapter describes how to use Visual Merchandising but does not describe other Merchandising functionality it helps you access, such as projects or preview. Refer to the appropriate sections of this guide to learn about Merchandising concepts and features.

UI Overview

This section provides an overview of the main elements of the Merchandising layout view, an editable preview session that is available when both preview and Visual Merchandising are configured in your environment. As with any preview session, layout view lets you preview assets so you can see how your changes will appear on

your live Web site. Layout view is interactive, letting you select assets to edit, organize, and add to projects and automatically displaying your changes.

Display layout view by clicking the Layout button at the top of the Merchandising page.
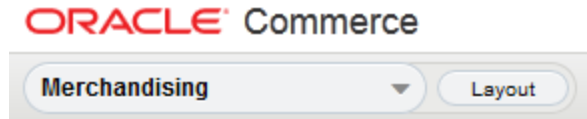
When the layout view is displayed, the Layout button is replaced by the Data button. To close layout view and return to Merchandising, click the Data button.
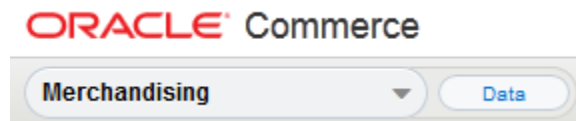
Selecting Assets in Layout View

Right-clicking a category, product, SKU, promotion, article, media content asset, or store text in layout view displays a pop-up menu with the following options:

- **Edit** displays the Details pane for the selected asset, where you can edit it as you normally would in Merchandising. See Editing Assets (page 52) for more information.

  If your access rights allow you to view but not edit the selected asset, the menu displays **View** instead of Edit. View displays the Details pane for the selected asset in read-only mode.

- **Light Table** launches the light table, where you can organize a category's products. See Organizing Collections with the Light Table (page 53).

- **Add to Project** adds the selected asset to the current project. See Adding Assets to a Project (page 7) for more information.

- **Add to Asset Tray** adds the selected asset to the asset tray. See Using the Asset Tray (page 23) for more information.

Right-clicking anything else in layout view displays your browser's right-click menu, which is not controlled by Merchandising. For example, in the following illustration, the browser menu appears when you right-click the CRS Home logo in layout view.
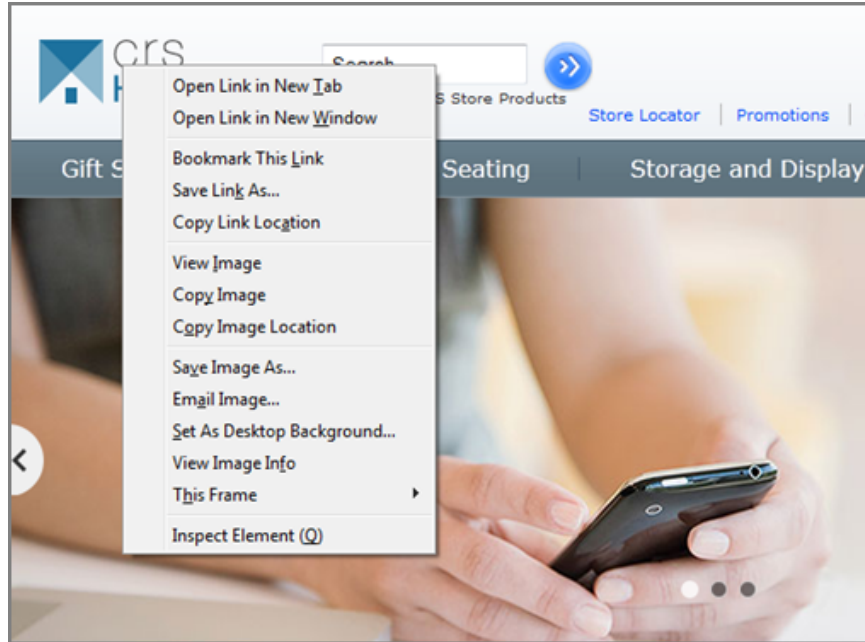
When you right-click a category, product, SKU, promotion, article, media content asset, or store text, Merchandising displays the name and type of the selected asset in the lower-left corner of the screen. This prompt helps you confirm the selected asset is the one you expect. For example, in the following illustration, the prompt shows that the product Tumbler Glass is selected in layout view.
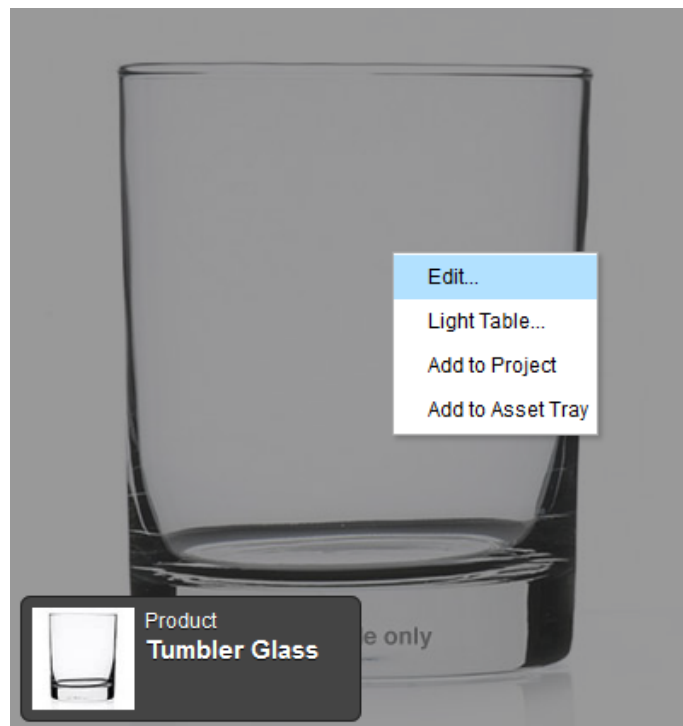
Highlighting Assets in Layout View

In layout view, you can turn on highlights that show you which assets you can select to work with Visual Merchandising features. For example, in the following illustration of the CRS Store menu bar, Gift Shop, Women, Men, Shoes, and Home Accents are all highlighted because they represent categories in the CRS Store catalog. New Items is not highlighted because it is a link to a page that displays products from a variety of categories.
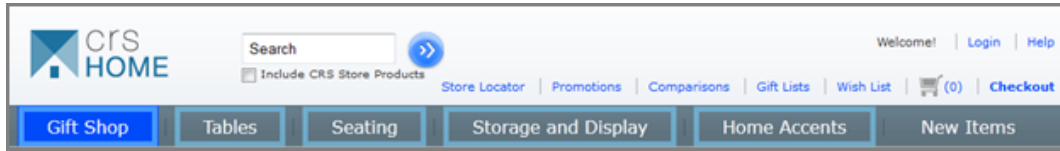
Display asset highlighting by clicking the icon at the left-hand side of the preview toolbar in layout view. Hide highlighting by clicking the button again.
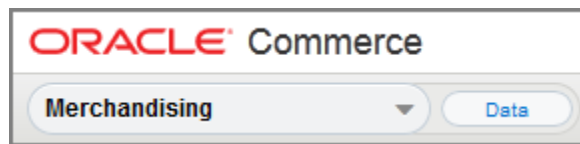
Editing Assets

In layout view, you can select an asset, such as a category, product, SKU, promotion, article, media content asset, or store text then edit it as you normally would in Merchandising. You can also add a selected asset to the current project or to the asset tray. For details about selecting assets to edit, see UI Overview (page 49).

Adding Assets to a Project

You can add an asset to the current project in layout view. For more information about assets in a project, see Project Basics (page 5).

To add a category, product, SKU, promotion, content asset, or store text to the current project, complete the following steps:

1. Click the Layout button.

2. Right-click an asset and select Add to Project from the pop-up menu.

Editing Assets

You can select a category, product, SKU, promotion, article, media content asset, or store text in layout view and then edit it as you normally would in Merchandising. When you save your changes, they are automatically displayed in layout view. For more information about editing assets, see *Creating and Managing Assets* (page 27).

To edit an asset, complete the following steps:

1. Click the Layout button.

2. Right-click an asset and select Edit from the pop-up menu.

The Details pane for the selected asset appears in a separate window.

Note: If your access rights allow you to view but not edit the asset, the menu displays View instead of Edit. Select View from the pop-up menu to display a read-only version of the Details pane for the selected asset in a separate window.

3. Make, review, and save your changes. See *Creating and Managing Assets* (page 27) for more information.

Layout view automatically updates to display your changes.

Organizing Collections with the Light Table

The light table is a type of property editor that you use to organize a category's fixed child products collection. Artists and photographers use light tables to illuminate and organize media like photograph negatives and artwork for publication. Similarly, you use the light table in Merchandising to organize products in a category using product images.

In the following illustration, the light table shows the fixed child products collection for a category called Glassware.
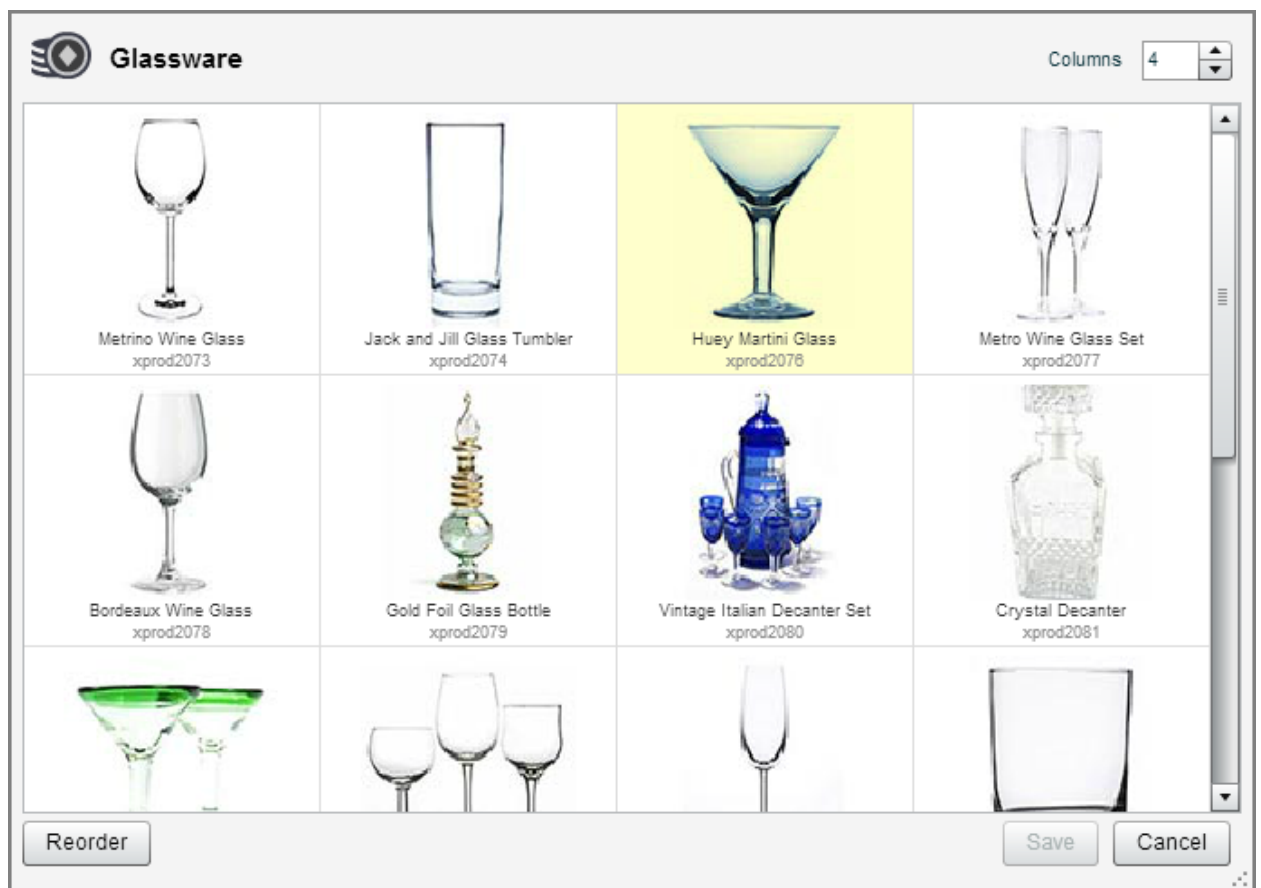
Each tile represents a product in the collection. Move your mouse pointer over a tile to see controls you use to reorder or remove the product.

You can use the light table to reorder a category's fixed child products collection and remove products from it. To work with other types of collections or perform other tasks on the fixed child products collection, edit the asset in the Merchandising Details pane. For more information, see Working with Collection Editors (page 39).

Displaying the Light Table

To display a category's products in the light table, complete the following steps:

1. Click the Layout button.

2. Right-click an asset and select Light Table from the pop-up menu:

   • If you click a category, the light table displays the fixed child products for that category.

   • If you click a product, the light table displays the fixed child products for that product's parent category. If the product has more than one parent category, select the category to display and click Select in the dialog that appears.

Troubleshooting

These tips might help if you find that right-clicking an asset does not display the light table:

- If the Light Table option is visible but disabled when you right-click an asset, your access rights might not be set to let you view or change the asset. Contact your administrator.

- If you see your browser's right-click menu when you right-click an asset, try clicking again, this time carefully positioning the pointer directly over the asset. If this behavior persists, contact your administrator.

Customizing the Light Table

You can customize the look of the light table by changing its size and the number of columns it displays. These changes remain in effect for the duration of your Oracle Commerce Platform session (unless you change them again) but are not saved when you log out.

To customize the light table, complete the following steps:

1. Display the light table. See for details.

2. To change its size, click and drag the lower-right corner.

   Your administrator can set a minimum size for the light table. You cannot make the light table smaller than its specified minimum size.

3. To change the number of columns, click the up and down arrows in the Columns control. The light table automatically updates based on your selection.

   Your administrator can set the minimum and maximum number of columns you can display in the light table. You cannot select more or fewer columns than the specified minimum or maximum number.

4. Click Save if you also made asset changes you want to save. You can also click Cancel to close the light table and save only its new size and number of columns.

Removing Products from Parent Categories

Removing a product from a collection does not remove it from the system but does automatically add it to the project.

To remove a product from a category, complete the following steps:

1. Display the light table. for details.

2. Click the X icon in the upper-right corner of the product's tile.

   If the X icon is disabled, you might have read-only access to the asset. Contact your administrator.

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3. Click Save.

Reordering Collections

Each product in a category's Fixed Child Products collection has a specific position in the collection. The page coding in many web sites, for example, the Commerce Reference Store application, uses the position to control the order in which products appear on the category pages.

Note: If you cannot reorder collections in the light table, you might have read-only access rights to the assets. Contact your administrator.

To reorder a category's fixed child products collection, complete the following steps:

1. Display a category's products in the light table. See Displaying the Light Table (page 54) for details.

2. To move a product to a new position in the collection, change the number in the upper-left corner of the product's tile and click Reorder.

   Enter a number from 1 to the number of products in the collection. If the number you enter is greater than the number of products, Merchandising moves the product to the end of the list.

3. To move a product to the top of a collection, click the arrow icon in the upper-left corner of the product's tile.

4. Click Save.

You can also drag one or more products to a new position in the light table:

1. Display a category's products in the light table. See Displaying the Light Table (page 54) for details.

2. Select one or more products in the light table. If you select multiple products, they do not have to be contiguous.

3. Drag the assets to a new position in the collection and drop them. A vertical line appears at a potential drop location when you hover over it.

   Merchandising automatically changes the order numbers to reflect the reordered collection.

4. Click Save.

Previewing and Testing Promotions

In layout view, you can see how your promotions behave when preview users shop for items. You can also edit promotions directly from layout view.

Note: This section describes how to work with promotions in Visual Merchandising but does not describe promotions functionality, such as stacking rules or condition and offer. Refer to *Creating and Managing Promotions and Coupons* (page 125) to learn about promotions concepts and features.

To preview and optionally edit promotions in layout view, follow the steps below:

1. Click the Layout button.

2. (Optional) Set the preview user and preview date. See Changing Options in a Preview Session (page 34) for more information.

3. Shop for items that you expect to trigger the promotions you want to test.

   When you add items to the shopping cart that qualify the order for promotions, Merchandising displays a message above the preview toolbar. It also updates the toolbar's promotions button to show the number of applied promotions, as well as the number and value of items in the shopping cart.
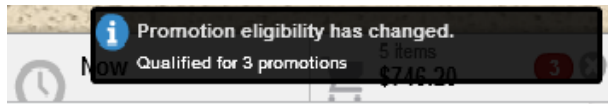
   To clear the shopping cart, click the x in the promotions button.

4. Click the promotions button in the preview toolbar to display the Promotions Visibility window.

   The window is divided into two parts: Lists of promotions are on the left and details for the promotion currently selected in those lists are on the right.
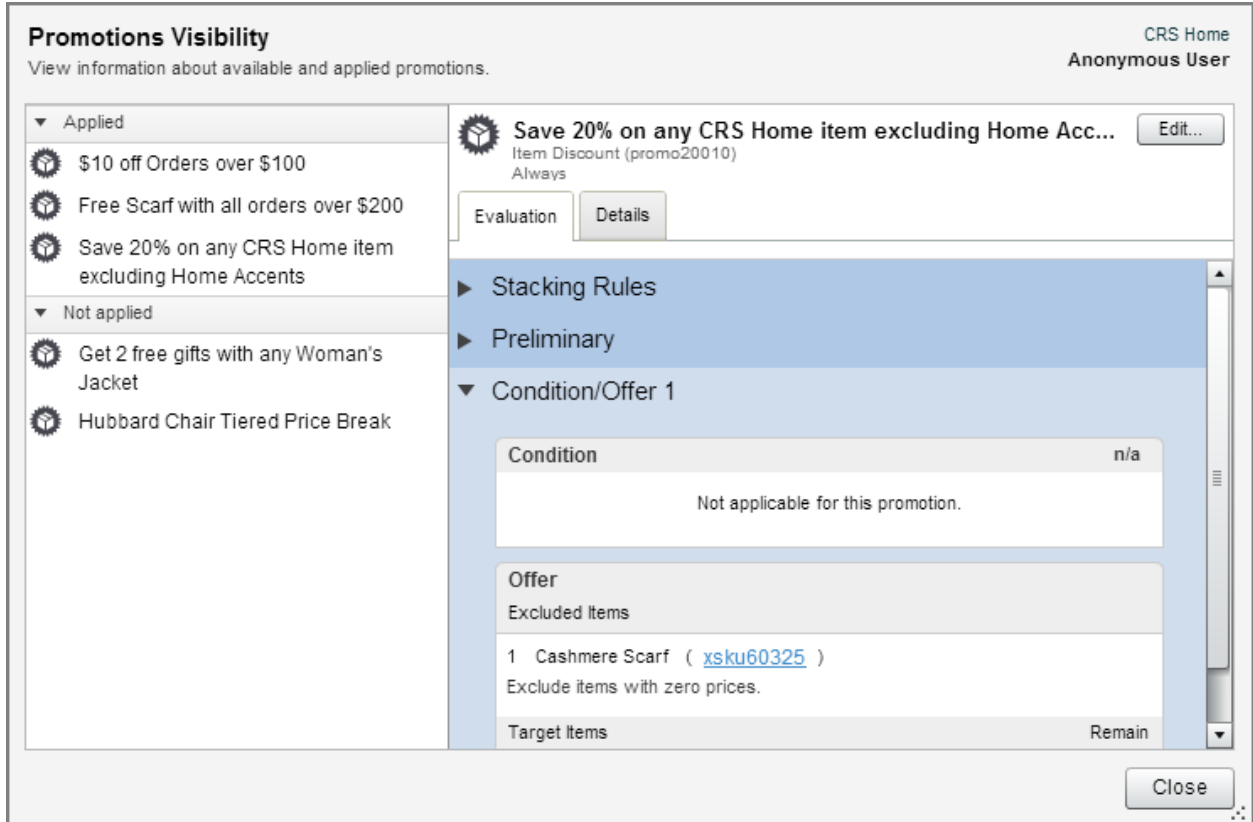
At the top of the Promotions Visibility window you can see the following information about the current preview session. See Changing Options in a Preview Session (page 34) for more information about these items.

- The name of the current preview user.

- If you are previewing in the future, the date and time.

- In a multisite environment, the name of the current site.

Note: The window does not display any item promotions if the shopping cart is empty. The shopping cart must contain at least one item in order for Merchandising to evaluate item promotions and display them in the window. If the shopping cart is empty, the window displays order promotions.

5. Review the details and evaluation results for the promotions to determine why they were or were not applied to the order. See Reviewing Promotions (page 58) for more information.

Reviewing Promotions

The left pane of the Promotions Visibility window lists enabled, active (not expired) promotions, divided into three sections.

- **Applied:** These are promotions that are applied to the current shopping cart. The condition and offer evaluation has passed and, in a multisite environment, the promotion is also valid on the site that the shopper is currently browsing.

- **Not applied:** These are promotions that were not applied to the current shopping cart. The stacking rule or condition and offer evaluation has not passed and, in a multisite environment, the promotion is valid on the site that the shopper is currently browsing.

- **Ineligible:** In a multisite environment, these are promotions that were not applied to the current cart. The promotion may have expired or, in a multisite environment, the promotion is not valid on the site that the shopper is currently browsing. Depending on how your administrator configured Visual Merchandising, you may not see the Ineligible list.

To view a list of promotions in the Applied, Not Applied, or Ineligible section, click the arrow next to the section's name.

Click a promotion in the left pane to display details about that promotion in the right pane. Promotion information is divided into two tabs:

- The Evaluation Tab (page 59) displays results of stacking rule and condition & offer statement evaluation for the selected promotion.

- The Details Tab (page 61) displays information about the selected promotion.

You cannot change any information directly in the Promotions Visibility window but you can click links (for example, stacking rules, promotion upsells on the Details tab or SKUs on the Evaluation tab) or the Edit button to launch an editing window where you can make and save changes to the promotion. See Editing Promotions (page 62) for more information.

You can view the following information about a promotion in the Promotions Visibility window. For more information about any of these items, see Creating Promotions (page 127).

Evaluation Tab

The following table describes the UI components of the Promotions Visibility window's Evaluation tab.

Item	Description
Maximum discounts per order	For promotions that apply a recurring discount (such as For Next promotions) the Evaluation tab displays a message if the number of discounts was restricted by the Evaluation Limit property.
Stacking Rules	Stacking rules are evaluated first for every promotion. If the stacking rule passes, promotion evaluation continues and the Stacking Rules section of the Evaluation tab displays a confirmation message. If the stacking rule does not pass, promotion evaluation stops and the Stacking Rules section of the Evaluation tab displays a description of the problem. For example, a message might inform you that another promotion of the same type was already applied. For more information about stacking rules, see Managing Promotions with Stacking Rules (page 161).

Item	Description
Preliminary	For item discount promotions that have passed the stacking rule evaluation, Merchandising checks that the shopping cart contains items that are valid as targets and qualifiers for the promotion. (Order discount and shipping promotions skip this step and go straight to the Condition/Offer evaluation.)
	If the shopping cart contains valid targets or qualifiers, evaluation continues and the Preliminary section of the Evaluation tab displays a confirmation message.
	If the shopping cart does not contain valid targets or qualifiers, evaluation stops and the Preliminary section of the Evaluation tab displays a description of the problem.
	For more information about item discounts, see How Promotions Work (page 125).
Condition/Offer	Merchandising evaluates condition & offer statements for every promotion that has passed the Stacking Rules evaluation and, if it is an item discount promotion, the Preliminary evaluation.
	The Condition/Offer evaluation determines whether the condition for a promotion has been met. For details about the information displayed in this section of the Evaluation tab, see Condition/Offer Evaluation (page 60).

Condition/Offer Evaluation

The Condition/Offer section of the Evaluation tab specifies whether the condition for a promotion has been met and displays information about how items in the shopping cart relate to the condition and offer. Condition & offer statements are evaluated for every promotion that has passed the Stacking Rules evaluation and, if it is an item discount promotion, the Preliminary evaluation.

Depending on the promotion type, template, and structure of the condition, the Condition/Offer section can display any of the following types of detailed information about items in the shopping cart:

The Advanced tab allows you to configure filters that restrict how promotions are applied to items. Some filters can apply to any promotion type; others apply to only item type promotions.

Advanced filters change whether items are considered when determining whether a particular shopping cart qualifies for a promotion. Filter settings can be changed as part of your Commerce application (see the *Qualifier Class* chapter of the *Commerce Programming Guide* for details). Merchandising reads the settings that are in place in your Commerce application and uses those as the default. You can override those settings for individual promotions.

- Excluded Items: Displays information about items in the shopping cart that have been excluded from the promotion by advanced filters. Filters restrict how promotions are applied to items. For example, the promotion might restrict items already on sale from being discounted further by the promotion. Excluded items can appear for both the condition and the offer.

  Information displayed for each item in the list includes the product's display name, the number of items that were excluded, the reason the item was excluded, and the ID of each applicable SKU in the shopping cart. Click the SKU ID to view or edit the SKU properties in the window that appears.

  For more information about advanced filters, see Advanced Filters (page 148).

- Qualifying Items: Displays information about items in the shopping cart that qualify for the promotion. Qualifying items appear only for the condition.

Information displayed for each item in the list includes the product's display name, the number of this item that qualify , the remaining number of this item that can act as qualifiers when added to the shopping cart, and the ID of the SKU in the shopping cart. Click the SKU ID to view or edit the SKU properties in the window that appears.

For more information about qualifying items in condition and offer statements, see Condition & Offer Templates (page 130).

- Target Items: Displays information about items that are discounted or given by the promotion. Target items appear only for the offer.

- Information displayed for each item in the list includes the product's display name, the number of this item that can act as a target for the promotion, the remaining number of this item that can act as targets when added to the shopping cart, and the ID of the SKU in the shopping cart. Click the SKU ID to view or edit the SKU properties in the window that appears.

For more information about target items in condition and offer statements, see Condition & Offer Templates (page 130).

Note: Detailed information is displayed only for items, not for other aspects of the promotion. For example, suppose you are testing a promotion that applies a 15% discount to all orders that include $100 in accessories and are placed by shoppers in the Fashionista user segment. The Evaluation tab displays information about the items in the shopping cart and how they affect the promotion. No information is displayed about the scenario that determines that only shoppers in the Fashionista segment qualify for the promotion.

Depending on the structure of the condition, Merchandising may need to perform the Condition/Offer evaluation more than once. For these promotions, the Evaluation tab displays the results of each iteration in a separate Condition/Offer section. For example, suppose you are testing the following promotion: "Buy 2 bath towels, get 50% off a hand towel," and the shopping cart contains four bath towels, four hand towels, and a bath mat. The system applies the discount twice, once per iteration as the condition is met and valid targets are found. Within each condition/offer evaluation items will be filtered out from acting as condition items or offer items.

If the condition & offer statement does not pass, promotion evaluation stops and the Condition/Offer section of the Evaluation tab displays the message Not Applied.

Details Tab

The following table describes the UI components of the Promotions Visibility window's Details tab.

Item	Description
Template	The template provides a starting point for your promotion, and determines what condition and offer options apply.
Description	Short description of the promotion.

Item	Description
Priority	The priority of the promotion. Promotions are applied in order of priority, with low priority numbers applied first. Engines sort the promotions by the value of this property. Note that a promotion's priority is secondary to the promotion type. For example, you can specify how a given Item Discount promotion is applied compared to other Item Discount promotions, but not the order in which Item Discounts are applied compared to Shipping Discounts.
Usage period	You can define the promotion's usage period either with a start and end date, or as a period of time starting from the moment the customer receives the promotion (for example, creates a customer profile). Promotions with no usage period expire only when they are disabled.
Maximum discounts per order	The Maximum Number Per Order value specified in a For Next promotion. This value specifies the maximum number of times the discount can be applied.
Promotion upsells	If promotion upsells are enabled, a list of upsells available to this promotion. Click an upsell to launch a new window where you can edit it as you normally would in Merchandising.
Coupons	Coupons associated with this promotion. Click a coupon to launch a new window where you can edit it as you normally would in Merchandising.
Promotion availability	Whether the promotion is available to all customers, can be used only with a coupon or scenario, or is available to registered customers.
Stacking rule	The stacking rule associated with this promotion. Stacking rules allow you to control which promotions can be used together. Click the stacking rule to launch a new window where you can edit it as you normally would in Merchandising.
Maximum promotions per stacking rule	The maximum number of promotions that can be combined using this stacking rule.
Stacking rule combinations	Additional stacking rules that can be used with the current rule.
Promotions to exclude	Promotions that can never be used with this promotion.

Editing Promotions

You can select a promotion in the Promotions Visibility window and then edit it as you normally would in Merchandising. When you save your changes, they are automatically displayed in layout view and the promotion

is added to the project. For more information about editing promotions, see *Creating and Managing Promotions and Coupons* (page 125).

To edit a promotion from the Promotions Visibility window, complete the following steps:

1. Click a promotion in the left side of the window.

2. Click the Edit button.

   The Details pane for the selected promotion appears in a separate window.

3. Make, review, and save your changes. See *Creating and Managing Promotions and Coupons* (page 125) for more information.

   The Promotions Visibility window automatically updates to display your changes.

Adding Promotions to the Asset Tray

You can add promotions to the asset tray by dragging them from the Promotions Visibility window's Applied, Not Applied, and Ineligible lists. For more information about the asset tray, see Using the Asset Tray (page 23). For more information about dragging and dropping assets, see Using Drag and Drop in Merchandising (page 46).

6   Creating and Managing Catalog Folders

You can use catalog folders to organize catalogs. Catalog folders are used only in Merchandising and other Oracle Commerce Platform administrator user interfaces; they do not appear on the Web sites themselves.

While you are developing your catalog, you may want to create a temporary structure using catalog folders to organize assets that you are not ready to add to the catalog hierarchy, but want to see in the Browse panel.

Creating Catalog Folders

You can create catalog folders in the following locations:

* In a multisite environment, at the top level of a site

* Inside another catalog folder

To create a new catalog folder:

1. In the Browse panel, navigate to the top level of a site or another catalog folder.

2. Click the Create button in the toolbar and select Catalog Folder.

3. Fill in the property fields in the Details pane. Only the Name field is required.

4. Click Create.

    If you create the folder from the Find panel and do not specify a Parent Folders property on the General tab in the folder's Details pane, Merchandising creates the new folder at the top level.

Catalog Folder Properties

You can work with the following catalog folder properties in the Details pane. The properties described in this section are the catalog folder properties that come with Merchandising by default. Your administrator might have added new catalog folder properties that are specific to your Web sites.

Property	Description
Name	The name for the folder. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Sites	In a multisite environment, the names of the sites to which the catalog folder belongs. This property is read-only. See Assets in a Multisite Environment (page 37).
Description	A short description for the folder.
Child Folders	A list of folders this folder contains.
Child Catalogs	A list of catalogs this folder contains.
Parent Folders	Folder that contains this folder. If empty, this folder is a root folder. This property is read-only. To change this folder's parents, move it, link it, or unlink it.

Moving Catalog Folders to the Top Level

The easiest way to move a nested folder to the root of the hierarchy is to split the Merchandising screen and drag the nested folder to the root. See Using Drag and Drop in Merchandising (page 46) for more information.

Deleting Catalog Folders

To delete a catalog folder at the root, you must view the project and delete it from there. See Removing Assets from a Project (page 8) for more information.

If you delete a catalog folder that contains another catalog folder, the child folder is moved to the top level of the catalog hierarchy.

7   Creating and Managing Catalogs

A catalog organizes your commerce assets in a hierarchy that reflects the way users will navigate to them on your Web sites. Catalogs are parents to two types of assets: categories and other catalogs. A catalog contained within another catalog is sometimes called a subcatalog, though it is technically just a catalog, with the same available properties as its parent.

To learn how to import an existing catalog into Merchandising, see *Importing and Exporting Assets* (page 109).

Creating Catalogs

To create a new catalog:

1. In the Browse panel, navigate to the top level of a site, a catalog folder, or another catalog. See Using the Navigation Pane (page 17) for more information.

    Note: You can also create a catalog from the Find panel when Catalog is selected in the For dropdown menu. This creates the catalog in the Uncategorized Items or Unsited Items list.

2. Click the Create button in the toolbar and select Catalog.

3. Fill in the property fields in the Details pane. The Name field is the only required field.

4. Click Create.

Catalog Properties

You can work with the following catalog properties in the Details pane. The properties described in this section are the catalog properties that come with Merchandising by default. Your administrator might have added new catalog properties that are specific to your Web sites.

General Tab

Property	Description
Name	Name used for the catalog in other Oracle Commerce Platform applications.
	The catalog name is a required property, but if you do not supply one here, Oracle Commerce Platform automatically creates one for you.
	The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Sites	In a multisite environment, the names of the sites to which the catalog belongs.
	This property is read-only. See Assets in a Multisite Environment (page 37).
Root categories	List of the top-level categories in the catalog.
All root categories	List of all the root categories in the catalog, including those in any subcatalogs. This property is read-only.
Sub catalogs at root	List of catalogs whose root categories are also root categories of the catalog. (for use in combining catalogs).
Enclosing catalogs	Parent catalogs, if this catalog is a subcatalog.

8   Creating and Managing Categories

Categories organize your catalog into a hierarchy that provides a navigational framework for your Web sites. Categories can be parents to catalogs, products, or other categories.

A category can be either the child of one or more other categories or a root category. A root category is a starting point in the navigational structure of the catalog. A catalog can contain more than one root category, but only one can be the navigation root. For example, a catalog could contain the following root categories:

* Commerce Root Category, which contain all the catalog's categories, products, and SKUs.

* Non-Navigable Root Category, which contains assets that can be purchased but are not included in navigation, like gift wrapping.

See Category Properties (page 69) for more information.

Note: A category can directly belong to multiple catalogs, making it easier for a category to be part of more than one site in a multisite environment.

Creating Categories

To create a new category:

1. In the Browse panel, select the catalog or category where you want to create the new category. See Using the Navigation Pane (page 17) for details.

   Note: You can also create a category from the Find panel when Categories is selected in the For dropdown menu. This creates the category in the Uncategorized Items or Unsited Items list.

2. Click the Create button in the toolbar and select Category.

3. Fill in the property fields in the Details pane. The Name field is the only required field.

4. Click the Create button at the bottom of the Details pane.

Category Properties

You can work with the following category properties in the Details pane. The properties described in this section are the category properties that come with Merchandising by default. Your administrator might have added new catalog properties that are specific to your Web sites.

General Tab

Property	Description
Default display name	Name used for the category on the site. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Sites	In a multisite environment, the names of the sites to which the category belongs. This property is read-only. See Assets in a Multisite Environment (page 37).
Start date	Date on which the category is available.
End date	Date the category is no longer available.
Default description	Short descriptive text to display with the category.
Default long description	Detailed descriptive text to display with the category.
Template	JSP template used to display the category. For details about working with templates, see *Creating and Managing Catalog Media Assets and Folders* (page 101).

Catalog Media Tab

Categories, products, and SKUs all have the same set of media properties: a template (on the General tab), thumbnail image, small image, large image, and auxiliary media. Your Web sites may not need all of these properties. For example, at most commerce sites, each SKU would not be displayed in its own template page. More commonly, a product's template page displays all child SKUs of the product.

Categories, products, and SKUs all have the same set of media properties to give you as much flexibility as possible when setting up your catalog. For example, you might want to associate certain media items with products rather than SKUs. If SKUs are differentiated by a visible characteristic such as color, you might want to have different image for each SKU, rather than having a single set of images associated with the parent product.

For details about working with Media properties, see *Creating and Managing Catalog Media Assets and Folders* (page 101).

Products Tab

Property	Description
Fixed child products	List of explicitly-set child products of this category.

Property	Description
Child products (group)	Name of the content group that contains child products of this category.

Advanced Tab

Property	Description
Sub catalogs	List of catalogs contained by this category. A subcatalog is a catalog whose root categories are child categories of this category.
Fixed related categories	List of explicitly-set categories related to this category.
Related categories (group)	Name of the content group that contains categories that are related to this category.
Parent categories for catalog	Parent category in the context of the current catalog.

9   Creating and Managing Products

A product is a navigational end-point in the catalog, for example, a fitted sheet or a pair of loafers. Products can be parents of SKUs.

Creating Products

To create a new product:

1. In the Browse panel, select the category where you want to create the new product. See Using the Navigation Pane (page 17) for details.

   Note: You can also create a product from the Find panel when Products is selected in the For dropdown menu. This creates the product in the Uncategorized Items or Unsited Items list.

2. Click the Create button in the toolbar and select Product.

3. Fill in the property fields in the Details pane. The Name field is the only required field.

4. Click the Create button at the bottom of the Details pane.

Product Properties

You can work with the following product properties in the Details pane. The properties described in this section are the product properties that come with Merchandising by default. Your administrator might have added new product properties that are specific to your Web sites.

General Tab

Property	Description
Default display name	Name used for the product on the site. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.

Property	Description
Online Only	Specifies whether the item is available for in-store pickup. If the Online Only value is set to No (default), the item is available for in-store pickup. If the Online Only value is set to Yes, the item is not available for in-store pickup and can only be purchased online.
Sites	In a multisite environment, the names of the sites to which the product belongs. This property is read-only. See Assets in a Multisite Environment (page 37).
Manufacturer	Name of the manufacturer of the product.
Start date	Date on which the product is available, if a collection filter is implemented to use this property. See the *Personalization Programming Guide* for information on filtering.
End date	Date the product is no longer available, if a collection filter is implemented to use this property. See the *Personalization Programming Guide* for information on filtering.
Default description	Short descriptive text to display with the product.
Default long description	Detailed descriptive text to display with this product.
Template	JSP template used to display the product. For details about working with templates, see *Creating and Managing Catalog Media Assets and Folders* (page 101).

SKUs Tab

Property	Description
SKUs	List of child SKUs of this product.
Displayable SKU attributes	List of properties of the product's SKUs that can be displayed by the `DisplaySkuProperties` servlet bean. For example, you could use this bean to display the Default display name and List price properties. For more information about this servlet bean, see the *Guide to Setting Up a Store*.

Categorization Tab

Property	Description
Parent categories	Categories that contain this product. See Working with Parent Categories (page 76) for more information.

Catalog Media Tab

Categories, products, and SKUs all have the same set of media properties: a template (on the General tab), thumbnail image, small image, large image, and auxiliary media. Your Web sites may not need all of these properties. For example, at most commerce sites, each SKU would not be displayed in its own template page. More commonly, a product's template page displays all child SKUs of the product.

Categories, products, and SKUs all have the same set of media properties to give you as much flexibility as possible when setting up your catalog. For example, you might want to associate certain media items with products rather than SKUs. If SKUs are differentiated by a visible characteristic such as color, you might want to have different image for each SKU, rather than having a single set of images associated with the parent product.

For details about working with Media properties, see *Creating and Managing Catalog Media Assets and Folders* (page 101).

Price Lists Tab

Price Lists allow you to target a specific set of prices to a specific group of customers. For example, price lists can be used to implement business to business pricing where each customer can have its own unique pricing for products based on contracts, RFQs and pre-negotiated prices. For details about working with the Price Lists tab, see Working with Product Prices (page 77) later in this chapter.

Note: Depending on how your administrator configured Merchandising, you might not see the Price Lists tab on a product's Details pane.

Suggestions Tab

Property	Description
Fixed related products	Static list of products related to this product.
Related products (group)	Name of the content group that contains the list of dynamic related products.
Dynamic related products	List of the products in the content group specified by the Related products (group) property. This property is read-only.
Related products	List of all products that are children of this product. This property is read-only.

Advanced Tab

Property	Description
Default keywords	Words that cause a search to return this product.
Discountable	Specifies whether or not the item is eligible to receive discounts through promotions. For more information about promotions, see *Creating and Managing Promotions and Coupons* (page 125).

Related Content Tab

Property	Description
Related articles	Articles associated with this product. For more information, see *Creating and Managing Articles* (page 87).
Related media content	Media Content items associated with this product. For more information, see *Creating and Managing Media Content* (page 91).

Working with Parent Categories

Parent categories are those immediately above the product in the hierarchy. For example, Accessories might be the parent category of the product Shoulder Bag. Linked products have multiple parent categories. For example, If you link the Shoulder Bag product to the Women's Gifts category, its parent categories are now Accessories and Women's Gifts.

The Parent Categories editor on the Categorization tab displays and lets you add or remove a product's parent categories.

Merchandising populates the Parent Categories editor depending on the task you perform:

- When you create a product in the Browse panel, the Parent Categories editor is automatically populated with the category that was selected when you created the product.

- When you create a product in the Find panel, or when a product is imported with no parent category information (such as products imported on a feed), the Parent Categories editor is empty.

- When you move, link, or unlink a product, the categories displayed in the Parent Categories editor are automatically updated to reflect the new parents.

You can also manually add or remove parent categories. See Working with Collection Editors (page 39) for more information.

Working with Product Prices

The information on the Price Lists tab in a product's Details pane reflects the price lists that have been set up by your administrator. You can change the price type and, if applicable, specify a price for the product.

Note: See *Creating and Managing Price Lists* (page 165) to learn how to perform more extensive price list configuration in the Price Lists view.

The Price Lists editor displays each price list that applies to a product and lets you edit each list's Price Type for the product.

To change the price for a product:

1. Navigate to a the Price Lists tab on a product's Details pane.

2. In the Price Lists editor, click the price list you want to edit.

3. Select an option from the Price Type list:

   - Inherit: The product price is specified by the price list. This is the default value.

- Override: Overrides the inherited price for this product with one you specify in the Product Price column.

- Volume: Substitutes the list's price for this product with a volume pricing scheme that you specify by clicking the Set volume pricing… button in the Product Price column. See *Creating and Managing Price Lists* (page 165) to learn about volume pricing.

4. Click the Save button at the bottom of the Details pane.

10   Creating and Managing SKUs

A SKU (stockkeeping unit) represents a purchasable instance of a product on a site. Customers do not actually purchase products, they purchase SKUs. A product can have several different SKUs associated with it, representing varieties, sizes, and colors. For example, the product Hoodie Sundress, which is available in two different colors and five sizes, has ten associated SKUs, one for each size/color combination. SKUs have no child assets.

Usually, a SKU represents a single item, such as "blue shirt in size medium." A configurable SKU represents something that is sold as a single item but has variable components, such as a computer system or a bicycle.

Creating SKUs

To create a new SKU or configurable SKU:

1. In the Browse panel, select the product you want to associate with a new SKU. See for details.

   Note: You can also create a SKU from the Find panel when SKUs is selected in the For dropdown menu. This creates the SKU in the Uncategorized Items or Unsited Items list.

2. Click the Create button in the toolbar and select SKU or Configurable SKU. Depending on how your Merchandising installation is configured, additional types of SKUs might be available.

3. Fill in the property fields in the Details pane. The Name field is the only required field.

4. Click the Create button at the bottom of the Details pane.

SKU Properties

SKU properties are used for display purposes, in a similar way to products and category properties. The properties are also used to integrate with other Oracle Commerce Core Commerce systems, such as pricing and fulfillment.

You can work with the following SKU properties in the Details pane. The properties described in this section are the SKU properties that come with Merchandising by default. Your administrator might have added new SKU properties that are specific to your Web sites.

General Tab

Property	Description
Default display name	Name used for the SKU on the site. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Online Only	Specifies whether the item is available for in-store pickup. If the Online Only value is set to No (default), the item is available for in-store pickup. If the Online Only value is set to Yes, the item is not available for in-store pickup and can only be purchased online.
Sites	In a multisite environment, the names of the sites to which the SKU belongs. This property is read-only. See Assets in a Multisite Environment (page 37).
Start date	Date on which the SKU is available, if a collection filter is implemented to use this property. See the *Personalization Programming Guide* for information on filtering.
End date	Date the SKU is no longer available, if a collection filter is implemented to use this property. See the *Personalization Programming Guide* for information on filtering.
Default description	Short descriptive text for display with the SKU.
Template	JSP template used to display the SKU. For details about working with templates, see *Creating and Managing Catalog Media Assets and Folders* (page 101).
Parent products	Products that contain this SKU. This property is read-only. To change this SKU's parents, see *Creating and Managing Products* (page 73).

Catalog Media Tab

Categories, products, and SKUs all have the same set of media properties: a template (on the General tab), thumbnail image, small image, large image, and auxiliary media. Your Web sites may not need all of these properties. For example, at most commerce sites, each SKU would not be displayed in its own template page. More commonly, a product's template page displays all child SKUs of the product.

Categories, products, and SKUs all have the same set of media properties to give you as much flexibility as possible when setting up your catalog. For example, you might want to associate certain media items with

products rather than SKUs. If SKUs are differentiated by a visible characteristic such as color, you might want to have different image for each SKU, rather than having a single set of images associated with the parent product.

For details about working with Media properties, see *Creating and Managing Catalog Media Assets and Folders* (page 101).

SKU Pricing Tab

SKU pricing is a simple pricing method that uses the product or SKU catalog page to assign a list price and, optionally, a sale price, to the SKU. SKU prices are independent of price lists. Depending on how your administrator configured Merchandising, you might not see the SKU Pricing tab on a SKU's Details pane. For example, if your catalog uses price lists, the SKU Pricing tab will likely not appear.

Property	Description
List price	Default price of the SKU before any discounts or promotions.
On sale	Boolean (yes/no) property that indicates if the item is on sale.
Sale price	Price of the SKU if the On Sale property is set to Yes.
Wholesale price	Wholesale price of the SKU.

Price Lists Tab

Price Lists allow you to target a specific set of prices to a specific group of customers. For example, price lists can be used to implement business to business pricing where each customer can have its own unique pricing for products based on contracts, RFQ and pre-negotiated prices. For details about working with the Price Lists tab, see Working with SKU Prices (page 83) later in this chapter.

Note: Depending on how your administrator configured Merchandising, you might not see the Price Lists tab on a SKU's Details pane.

Advanced Tab

Property	Description
Bundle links	List of SKU links that make up a SKU bundle. If this property editor is empty, the SKU is not a bundle.
Derived catalogs	Used to determine if an end user has permission to view this SKU. This property is read-only.
Dynamic attributes	Additional configurable attributes of the SKU, specified as a key/value pair for each attribute you define. For example, you could specify the key/value pair color/red or size/small.

Property	Description
Discountable	Specifies whether or not the item is eligible to receive discounts through promotions. For more information about promotions, see *Creating and Managing Promotions and Coupons* (page 125).
Fulfiller	Fulfiller who will ship the item.
Replacement products	Products to suggest as replacements if the item is out of stock.

Creating SKU Bundles

SKU bundles are SKUs composed of several other SKUs. Bundles allow a group of items to be purchased as a single item but treated as multiple items in order fulfillment. Bundles differ from configurable SKUs in that the component SKUs of a bundle are always the same. For example, a SKU bundle could consist of six #2 pencils and a pencil case.

Creating a SKU bundle is a three-part process:

1. Create the individual SKUs that the SKU bundle is composed of.

2. Create SKU links from the SKUs. A SKU link consists of an individual SKU and a quantity.

3. Create a SKU whose Bundle links property consists of one or more SKU links.

For example, suppose you want to create a SKU bundle that consists of six #2 pencils and a pencil case:

1. Create a SKU that represents a #2 pencil, and create another SKU that represents a pencil case.

2. Create a SKU bundle by creating a new SKU that will contain links to the Pencil SKU and the pencil case SKU.

3. In the SKU bundle, create a SKU link that represents six of the #2 pencil SKUs, and create another SKU link that represents one of the pencil case SKUs.

Creating a SKU Bundle

Once you have created one or more SKUs to associate with SKU links, you can create a SKU that combines the links:

1. Create a new SKU, as described earlier in this chapter.

2. On the Advanced tab in the Details pane, click the Bundle Links property.

3. Click the + button to create a new link.

4. In the New SKU Link dialog box, enter the following required properties:

   Name: A descriptive name for the SKU link.

   Item: The SKU to associate with this link. You can select an existing SKU or create a new SKU.

Quantity: The number of Items to include in this bundle.

5. Click Create to create the new SKU link and close the dialog box.

6. Repeat steps 3 through 5 for each new SKU link you want to create.

7. Click Save to save your changes to the SKU bundle.

Creating Configurable SKUs

While a regular SKU represents a single item, such a size medium blue shirt, a configurable SKU represents an object that is sold as a single item, but has variable components, such as a computer system for which a shopper can select the amount of memory and hard-disk size. You create a configurable SKU the same way as a regular SKU, but you must add configurable properties to it.

To add a new configurable property to a configurable SKU:

1. Create a new Configurable SKU, as described earlier in this chapter.

2. On the Advanced tab in the Details pane, under Configurable Items, click the Configurable Properties property.

3. Click the + button to create a new configurable property.

4. In the New Configurable Property dialog box, enter the following required properties:

   Name: A descriptive name for the property.

   Configuration Options: Specify a product, if this configurable option will represent a product, or specify a SKU if this option will represent a SKU.

5. Click Create to create the new configurable property and close the dialog box.

6. Repeat steps 3 through 5 for each new configurable property you want to create.

7. Click Save to save your changes to the configurable SKU.

Working with SKU Prices

The information on the Price Lists tab in a SKU's Details pane reflects the price lists that have been set up by your administrator. You can change the price type and, if applicable, specify a price for the SKU.

Note: See *Creating and Managing Price Lists* (page 165) to learn how to perform more extensive price list configuration in the Price Lists view.

The Price Lists editor displays each price list that applies to a SKU and lets you edit each list's Price Type for the SKU.

To change the price for a SKU:

1. Navigate to the Price Lists tab on a SKU's Details pane.

2. In the Price Lists editor, click the price list you want to edit.

3. Select an option from the Price Type list:

   • Inherit: The SKU price is specified by the price list. This is the default value.

   • Override: Overrides the inherited price for this SKU with one you specify in the SKU Price column.

   • Volume: Substitutes the list's price for this SKU with a volume pricing scheme that you specify by clicking the Set Volume Pricing… button in the SKU Price column. See *Creating and Managing Price Lists* (page 165) to learn about volume pricing.

4. (Optional) A SKU can be a child of more than one product. To set a different price for the same SKU under different products, repeat step 3 for each Price Type / Price in product name column pair that appears in the Price Lists editor.

5. Click the Save button at the bottom of the Details pane.

11   Creating and Managing Content Folders

You can use content folders to organize articles and media content. Content folders are used only in Merchandising and other Oracle Commerce Platform user interfaces; they do not appear on Web sites themselves.

Creating Content Folders

Before creating content assets and folders, consider how you want to organize them. For example, you can organize them by subject matter or asset type. You can create content folders at the top level of Content or inside another content folder.

To create a new content folder, complete the following steps:

1. In the Browse panel, navigate to Content or another content folder.

    Note: You can also create a folder from the Find panel when Content is selected in the Look in dropdown menu.

2. Click the Create button in the toolbar and select Content Folder.

3. Fill in the property fields in the Details pane. Only the Name field is required.

4. Click Create.

    If you create the folder from the Find panel and do not specify a Parent Folders property on the General tab in the folder's Details pane, Merchandising creates the new folder at the top level.

Content Folder Properties

You can work with the following content folder properties in the Details pane. The properties described in this section are the content folder properties that come with Merchandising by default. Your administrator might have added new properties that are specific to your Web sites.

General Tab

Property	Description
Name	The name for the folder. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Description	A short description for the folder.
Parent Folders	Folder that contains this folder. If empty, this folder is a root folder.
Created by	User name of the Merchandising user who created the folder. This property is read-only.
Creation date	Timestamp of when this folder was created. This property is read-only.
Modified by	User name of the Merchandising user who last updated the folder. This property is read-only.

Deleting Content Folders

A content folder must be empty before you can delete it.

12   Creating and Managing Articles

An article is an HTML document that shoppers can read on your Web site. For example, a product detail page for a dining table might include an article about how to care for wood furniture. An article can include rich text, images, and other media content, such as video. You can also associate related products and categories with an article.

Creating Articles

To create a new article, complete the following steps:

1. In the Browse panel, navigate to Content. See Using the Navigation Pane (page 17) for details.

    Note: You can also create an article from the Find panel when Content is selected in the Look in dropdown menu.

2. Click the Create button in the toolbar and select Article.

3. Fill in the property fields in the Details pane. Required fields are marked with a star icon.

4. Click the Create button at the bottom of the Details pane.

Article Properties

You can work with the following properties in the Details pane. The properties described in this section are the properties that come with Merchandising by default. Your administrator might have added new properties that are specific to your Web sites.

General Tab

Property	Description
Name	Name used for the article in Merchandising. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.

Property	Description
Headline	Headline for the article. Unlike the Name, which you use internally with Merchandising, the headline will appear on your Web site.
Body	HTML text of the article. See Working with HTML Editors (page 38) for more information.
Main image	Main image to display when rendering an article on a page. See *Creating and Managing Media Content* (page 91) for more information.
Thumbnail image	Thumbnail image to display when rendering an article on a page, such as in a spotlight. This image is also used as the thumbnail image for the article in Merchandising. See *Creating and Managing Media Content* (page 91) for more information.
Tags	List of tags associated with the article. See *Creating and Managing Tags* (page 95) for more information.
Author	Author of the article.
Abstract	HTML summary of the article.
Sites	In a multisite environment, the names of the sites to which the article belongs. See Assets in a Multisite Environment (page 37) for more information.
Post date	Timestamp when the article was posted. (Note that this is not necessarily the same as the Start Date.) This property is intended for display on the Web site and to be used for sorting.
Parent folder	Folder that contains this asset.
Start date	Timestamp of when the article becomes available, if a collection filter is implemented to use this property.
End date	Timestamp of when the article is no longer available, if a collection filter is implemented to use this property.
Parent Folder	Folder that contains this article.
Created by	User name of the Merchandising user who created the article. This property is read-only.
Created on	Timestamp of when this article was created. This property is read-only.
Modified by	User name of the Merchandising user who last updated the article. This property is read-only.

Related Content Tab

Property	Description
Related products	Products associated with this article.
Related categories	Categories associated with this article.
Related articles	Other articles associated with this article.
Related media content	Media Content items associated with this article.

13 Creating and Managing Media Content

Media content assets are binary files that represent Web content, including images, audio clips, PDF files, and video clips. For example, a product detail page for a gas grill could include a video clip showing how to assemble the grill, articles that include recipes and the owner's manual provided as a PDF file.

Media content assets are represented URL that points to a binary file stored in the mediaContent repository and managed by Merchandising. Merchandising automatically detects the type of media the URL points to, based on its file type. The following table describes the file types that apply to each media type.

Media Type	File Types
Video	MOV, MOVIE, QT, AVI, MPEG, MPG, MPE
Image	RGB, PNM, JPG, PNG, PGM, IEF, XBM, JPEG, PPM, JPE, GIF, PBM, TIF, TIFF, XPM, RAS, WBMP, XWD, ICO
PDF	PDF
Audio	AIFC, AIF, AIFF, AU, WAV, SND
Other	Other file types, for example, RTF.

Creating Media Content Assets

To create a new media content asset, complete the following steps:

1. In the Browse panel, navigate to Content. See for details.

    Note: You can also create media content from the Find panel when Content is selected in the Look in dropdown menu.

2. Click the Create button in the toolbar and select Media Content.

3. Fill in the property fields in the Details pane. Required fields are marked with a star icon.

4. Click the Create button at the bottom of the Details pane.

Media Content Properties

You can work with the following properties in the Details pane. The properties described in this section are the properties that come with Merchandising by default. Your administrator might have added new properties that are specific to your Web sites.

General Tab

Property	Description
Name	Name used for the asset in Merchandising. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Title	Title for the asset that will appear on your Web site.
URL	URL that points to the file in the mediaContent repository.
Media type	Automatically set to one of the following values, based on the filename extension in the URL: Video, Image, PDF, Audio, Other. This property is read-only.
Thumbnail image	Thumbnail image to display when rendering the asset on a page, such as in a spotlight. This image is also used as the thumbnail image for the asset in Merchandising.
Tags	List of tags associated with the asset. See *Creating and Managing Tags* (page 95) for more information.
Description	Description of asset that will appear on your Web site.
Sites	In a multisite environment, the names of the sites to which the asset belongs. See Assets in a Multisite Environment (page 37) for more information.
Parent Folder	Folder that contains this asset.
Created by	User name of the Merchandising user who created this asset. This property is read-only.
Created on	Timestamp of when this asset was created. This property is read-only.
Modified by	User name of the Merchandising user who last updated this asset. This property is read-only.

Related Content Tab

Property	Description
Related products	Products associated with this asset.
Related categories	Categories associated with this asset.
Related articles	Other articles associated with this asset.
Related media content	Other media content items associated with this asset.

14 Creating and Managing Tags

A tag is a label that you assign to articles and media content assets. Aside from its automatically-assigned ID, a tag has only one property, the `tag` property that holds a simple text string. For example, you could create a tag whose `tag` property has the value `back to school`, and apply the tag to articles and media related to a Fall Sale campaign.

You can assign a tag to any number of articles and media content assets, and an article or media content asset can have any number of tags assigned to it. Values of the `tag` property can be used for searching and guided navigation.

Note: Tags are not site-aware. In a multisite environment, tags are available to articles and media content assets on all sites.

Creating Tags

You must create tags either in the Find panel or from the Details pane of an article or media content asset you want to tag. You cannot create or view tags in the Browse panel.

Creating Tags from the Find Panel

To create a new tag from the Find panel, complete the following steps:

1. In the Find panel, select Content in the Look in dropdown menu and Tags in the For dropdown menu. See for details.

2. Click the Create button in the toolbar and select Tag.

3. Enter the text for the tag.

   Note: The text you enter here becomes a single tag. Separating words with spaces or commas does not create an individual tag for each word.

4. Click the Create button at the bottom of the Details pane.

Creating Tags from the Details Pane

Tags you create in the Details pane of an article or media content asset are automatically assigned to that asset but are also available to be assigned to other articles and media content assets.

To create a new tag from the Details pane of an article or media content asset, complete the following steps:

1. Select an article or media content asset in the Browse or Find panel to display its properties in the Details pane.

2. On the General tab, click the Tags property.

3. In the Tags collection editor, click the + button and enter the text for the tag in the window that appears. See Creating New Assets (page 27) for more information.

4. Click Create.

   The new tag appears as the first item in the collection.

5. (Optional) To assign existing tags to this asset, click Select in the Tags collection editor and search for tags to add. For more information, see Working with Collection Editors (page 39).

15   Creating and Managing Store Locations

Store Locations are assets that contain information about physical "brick and mortar" stores, such as addresses and hours. Store locations are used by the in-store-pickup features, though you can also display them on your web site.

Creating Store Locations

To create a new store location asset:

1. In the Browse panel, navigate to Store Locations. See Using the Navigation Pane (page 17) for details.

   Note: You can also create a store location from the Find panel when Store Locations is selected in the Look in dropdown menu.

2. Click the Create button in the toolbar and select Store.

3. Fill in the property fields in the Details pane. Required fields are marked with a star icon.

4. Click the Create button at the bottom of the Details pane.

Store Location Properties

You can work with the following properties in the Details pane. The properties described in this section are the properties that come with Merchandising by default. Your administrator might have added new properties that are specific to your Web sites.

Note: Merchandising does not validate any of the information you enter for a store. For example, it does not check that the postal code matches the rest of the address.

General Tab

Property	Description
Name	The name for the store location. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Merchant Store ID	The ID number that banks and credit card institutions use to identify the store when processing credit card payments.
Start date	Date on which the asset is available. For more information, see Working with Calendar Editors (page 42).
End date	Date the asset is no longer available. For more information, see Working with Calendar Editors (page 42).
Sites	In a multisite environment, the names of the sites to which the store belongs. See Assets in a Multisite Environment (page 37).
Site Groups	In a multisite environment, the names of the site groups to which the store belongs. See Assets in a Multisite Environment (page 37).
Latitude	The latitude coordinate of the store's location. For example, 33.51.
Longitude	The longitude coordinate of the store's location. For example, -112.03.
Address 1	The first line of the store's address. For example, 2404 East Camelback Road.
Address 2	The second line of the store's address. For example, Fashion Park.
Address 3	The third line of the store's address. For example, #100E.
City	The city where the store is located. For example, Phoenix.
County	The country where the store is located. For example, Maricopa.
State	The state where the store is located. For example, AZ.
Postal Code	The postal code for the store's location. For example, 85016.
Country	The country where the store is located. For example, USA.
Hours	The store's opening hours. For example, Weekdays 10:00 AM – 7:00 PM.
Phone Number	The store's phone number. For example, 949-721-2000.
Fax Number	The store's fax number. For example, 949-721-2000.
Email	The store's email address. For example, service@example.com.

Related Content Tab

Property	Description
Related articles	Articles associated with this location. For more information, see *Creating and Managing Articles* (page 87).
Related media content	Media Content items associated with this location. For more information, see *Creating and Managing Media Content* (page 91).

16 Creating and Managing Catalog Media Assets and Folders

Catalog media assets are assets that typically have content, such as a URL pointing to a Web page, a JSP template, or a block of product copy that is managed by Merchandising. In technical terms, media assets are Core Commerce assets that are stored in a content repository.

You can work with the following types of media assets for catalog items:

- Media-internal-text assets store blocks of text. For example, a line of text displayed by a slot on your Web site might be stored as a media-internal-text asset.

- Media-internal-binary assets store binary files, such as images or PDFs.

   Note: Avoid using large files, such as product images, as media-internal-binary assets. Doing so may increase the size and reduce the speed of deployment. The media-internal-binary items should be used for smaller files. For larger files, use media-external assets.

- Media-external assets store URLs that point to files, such as text or binary files, that are stored outside the catalog database. For example, a JSP template used for all products might be stored as a media-external asset.

You organize media assets in media folders. Media folders are required, that is, a media asset cannot exist outside a media folder. Before you create your media assets, decide how you want to organize them and create an appropriate folder structure.

Creating Catalog Media Folders

Before creating media assets and folders, consider how you want to organize them. For example, you can organize them by subject matter or asset type. You can create media folders at the top level of Catalog Media or inside another media folder:

To create a new media folder:

1. In the Browse panel, navigate to Catalog Media. See Using the Navigation Pane (page 17) for details.

2. Click the Create button in the toolbar and select Media Folder.

3. Fill in the property fields in the Details pane. Only the Name field is required.

4. Click the Create button at the bottom of the Details pane.

Media Folder Properties

You can work with the following media folder properties in the Details pane. The properties described in this section are the media folder properties that come with Merchandising by default. Your administrator might have added new media folder properties that are specific to your Web sites.

Properties Tab

Property	Description
Name	The name for the folder. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Description	A short description for the folder.
Parent Folder	Folder that contains this folder. If no value is displayed, this folder is a root folder.
Path	Complete pathname of the folder.
Creation date	Date this folder was created.
Start date	Date this folder becomes available.
End date	Date this folder will no longer be available, if a collection filter is implemented to use this property.

Creating Media Assets

To create a new media asset:

1. In the Browse panel, navigate to Catalog Media. Select the folder where you want to create the new asset. See Using the Navigation Pane (page 17) for details.

   Note: You can also create a media asset from the Find panel when Media is selected in the For dropdown menu. This creates the media asset in the Uncategorized Items or Unsited Items list.

2. Click the Create button in the toolbar and select one of the following:

   • Media – External

   • Media – Internal – Binary

   • Media – Internal – Text

3. Fill in the property fields in the Details pane. Required fields are marked with a star icon.

4. Click the Create button at the bottom of the Details pane.

Media-External Properties

You can work with the following properties in the Details pane. The properties described in this section are the properties that come with Merchandising by default. Your administrator might have added new properties that are specific to your Web sites.

General Tab

Property	Description
Name	The name for the media asset.
	This property is required.
	The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Description	A short description for the asset.
Parent Folder	Folder that contains this asset.
	This property is required.
Path	Complete pathname of the asset.
	This property is read-only.
URL	Relative URL that can be used in a JSP page to access the media asset.
	This property is required.

Media-Internal-Text Properties

You can work with the following properties in the Details pane. The properties described in this section are the properties that come with Merchandising by default. Your administrator might have added new properties that are specific to your Web sites.

General Tab

Property	Description
Name	The name for the media asset.
	This property is required.
	The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Description	A short description for the asset.

Property	Description
Data	The text that comprises the asset. This property is required.
Parent Folder	Folder that contains this asset. This property is required.
Path	Complete pathname of the asset. This property is read-only
Creation date	Date and time the asset was created. This property is read-only.

Media-Internal-Binary Properties

You can work with the following properties in the Details pane. The properties described in this section are the properties that come with Merchandising by default. Your administrator might have added new properties that are specific to your Web sites.

General Tab

Property	Description
Name	The file name of the media asset, including extension, such as .JPG, .GIF, or .PNG. This property is required.
Description	A short description for the asset.
Data	The data that comprises the asset. This property is required.
Parent Folder	Folder that contains this asset. This property is required.
Path	Complete pathname of the asset. This property is read-only.
Creation date	Date and time the asset was created. This property is read-only.
Mime type	The content type value for the asset. This property is read-only.

Deleting Media Folders

If you delete a media folder that contains another folder, the child folder is moved to the top level of the Catalog Media hierarchy.

17   Creating and Managing SEO Tags

Web search engines base their rankings of pages partly on the words that appear in certain HTML tags, particularly `<meta>` tags and the `<title>` tag. A common search engine optimization (SEO) technique is to list key search terms in those tags to raise the ranking of the pages for those terms. SEO tags are items whose properties are used to set the content of the `<title>` and `<meta>` tags of site pages. SEO tags, and the values to use for their properties, are described in detail in the *Platform Programming Guide*.

To create an SEO tag:

1. In a Commerce Assets project, navigate to SEO Tags. See .

2. Click the Create New button, and select SEO Tags from the dropdown menu.

3. In the Content Key text box, enter an identifier to use for looking up the item.

4. In the Description text box, enter text describing the content of the page.

5. In the Keywords text box, enter a list of search keywords for the page.

6. In the Title text box, enter text to be used as the title of the page.

7. In the Display Name text box, enter a display name to be used for the item.

8. Click Create.

    The new item displays in the Navigation pane.

18 Importing and Exporting Assets

You can export Oracle Commerce assets so you can work with them outside of Merchandising and easily import those changes back into the Oracle Commerce Platform system. For example:

- If new catalog information arrives on an automated feed, you can format and edit the new assets in bulk and import them into your catalog.

- If you receive updates from a number of people, you can incorporate all the changes into Merchandising at once instead of manually entering each change.

- You can quickly make bulk edits or perform global operations (like search and replace or spell-checking) on catalog assets in a spreadsheet and then import those changes back into your catalog.

- You can distribute asset information for review to people who do not have access to Merchandising.

Exporting Assets

You can export catalog assets and their properties or prices to a file in XLS (Microsoft Excel) or CSV (Comma Separated Value) format. You can then use a spreadsheet editor, such as Microsoft Excel, to view and edit property values. Before beginning the export, you can use the preview option to display the first few rows of the spreadsheet and review your selections.

Export Guidelines and Limitations

This section provides information that helps you plan your export.

Asset Types Not Available for Export

Merchandising does not export the following types of assets:

- Price lists

- Price list folders

Exporting Asset Properties

When you export an asset, you can export any of its properties that have the following data types:

- `string`

- `big string`

- `list`, `set`, and `map` collections of strings and repository items

  Note: Arrays are not supported.

- `date`

- `timestamp`

- `int`

- `long`

- `float`

- `double`

- `enumerated`

- `boolean`

- repository items

For more information about property data types, see the chapters that describe creating and working with different asset types earlier in this guide.

For information about the properties you can export for prices, see Exporting Price Properties (page 113).

Asset Versioning

You do not have to add assets to a project to export them, but you do have to be working in the context of a project.

If you select an asset for export that you modified in your project, the modified version is exported. Otherwise, the main version—the version last checked in—is exported.

Note: Versioning information is not included in the export. If you plan to edit and re-import the spreadsheet to Merchandising, see Versioning Considerations (page 117).

Security

You must have Read and List access for assets and properties you want to export. You do not need Write access to export assets but you do need Write access to import changes to assets and properties. For more information about user permissions, contact your administrator or see *Managing User Access and Security* in the *Content Administration Programming Guide*.

Exporting in a Multisite Environment

In a multisite environment, each catalog asset is assigned the following properties:

- Sites: Defines site membership for the asset.

- Parent Category

Merchandising does not export either of these properties for catalog items, but does export the Sites property for promotions.

Export Size Limitations

- The maximum number of asset rows is 65,534

The maximum number of asset rows that can be exported to a single spreadsheet is 65,533. Microsoft Excel has a maximum row limit of 65,536, and the first two rows of the exported spreadsheet are reserved for information about the export. If you export more than 65,534 assets, or you choose to itemize a collection property and the total number of items for all exported assets exceeds 65,534, any assets or collection items above that limit are not included in the spreadsheet. A message appears warning you that the data has been truncated.

- The maximum number of characters in a cell is 32,767

Microsoft Excel does not allow more than 32,767 characters in a single cell. You could encounter this limit for any very long property value, but it is most likely to be an issue when you export very large collection properties, for example, a list of 2,000 SKU IDs that are greater than 15 characters each. In this case, use itemized format. See Options for Exporting Collection Properties (page 111).

Exporting Different Types of Assets

You can export only one type of asset in each export procedure. For example, you cannot export both products and categories to the same spreadsheet; you must export the products in one export procedure and then export the categories in another.

Some asset types are children of other asset types. For example, Configurable SKU is a type of SKU and Item Discount is a type of Promotion. If you choose to export a parent asset, all its child assets are automatically exported.

If you export both parent and child assets, only properties that apply to both asset types are available for export. For example, the One use per order property is not available for export when you select the Promotion asset type, but it is available when you select Shipping Discount.

Options for Exporting Collection Properties

You can export supported collection properties, such as lists, sets, and maps, in either of the following formats:

- Flat: all collection items are listed in one cell and separated by commas

- Itemized: each collection item is listed in a separate row

For instructions, see Exporting Asset Properties (page 109).

Items in map collections contain key/value pairs that map one thing to another. To represent these items, the key and the value are separated by an equals sign, for example, `Alabama=AL,Alaska=AK`.

Flat Format

In flat format, each row of the spreadsheet represents a single asset with all of its exported properties. This format allows you to export multiple properties for each asset. Individual values in a collection are separated by a comma, for example, `blue,green,red`, or a comma and a space if they are repository items, for example, `cat110006, cat11008, cat11009`.

The following table shows how the `childSKUs` collection property appears in flat format:

ID	displayNameDefault	childSKUs
xprod1068	Wool waist tie top	xsku1448, xsku1449
xprod2525	Metallic silk blend tank top	xsku2525_1, xsku2525_2

Note: If collection items contain only numbers, or contain a comma in a value, the items are enclosed in double quotation marks, for example, `"123","124"`. This prevents Microsoft Excel from interpreting the list of numbers as a single number. If a value contains a comma, the double quotation mark indicates that the comma does not begin a new item. For example, a keyword collection could be exported as: `winter accessories,"hats, scarves, and gloves",knitted gifts`. The quotation marks are removed if you re-import the spreadsheet.

Itemized Format

In itemized format, collection items are separated into individual rows, so one asset might span several rows in the spreadsheet. If you choose to itemize a collection property, you can only select that one property for export.

The following table shows the products from the previous example with the `childSKUs` property in itemized format:

ID	childSKUs
xprod1068	xsku1448
xprod1068	xsku1449
xprod2525	xsku2525_1
xprod2525	xsku2525_2

Exporting Prices for Products and SKUs

You can export prices from a price list for products and SKUs so you can work with them outside of Merchandising and easily import those changes back into the Oracle Commerce Platform system. You choose a price list whose prices you want to export, but you cannot export price list assets themselves.

Note: You can export prices from only one price list per export procedure.

The guidelines and limitations for exporting prices are the same as those for exporting other asset properties. For example, the export size limitation (a maximum of 65,534 asset rows) is the same if you are exporting asset properties or prices. For more information, see Export Guidelines and Limitations (page 109).

Volume Pricing

Volume pricing models are not supported for export. Exported volume prices are marked the keyword `IGNORE` in the cell that contains the `price` property .and `COMPLEX` in the cell that contains the `listPrice` property. For more details about volume pricing models in price lists, see *Creating and Managing Price Lists* (page 165).

Inherited Prices

When the price for an exported product or SKU is inherited from a base price list, the keyword `IGNORE` marks the cell that contains the `ID` property and the cell that contains the `Price` property is empty.

	A	B	C	D	E	F
1	/atg/commerce/pricing/priceLists/SecurePriceLists:price				LOCALE=en_US	
2	ID	listPrice	priceList	skuId.displayNameDefault	skuId	
3	IGNORE		plist3080003	Samuel Wine Glass	xsku2088	

You can replace the keyword IGNORE with a NEW keyword and provide a price value in listPrice column. A new price will be applied/created, when you import the spreadsheet

You can replace the keyword `IGNORE` with the keyword `NEW` and provide a price value that will be applied when you import the spreadsheet in the `listPrice` column. See Marking Data to Ignore (page 120).

For more information about inherited prices, see *Creating and Managing Price Lists* (page 165).

Exporting Price Properties

When you export prices for products or SKUs, Merchandising automatically exports the following properties:

- `Price Item ID`

- `PriceList ID`

- `SKU ID` or `Product ID`

- `SKU Name` or `Product Name`

- `Price`

Note: You cannot change the list of properties to export, though the list you see might not contain all the properties listed here, depending on how your administrator configured Merchandising.

Exporting Asset Properties

Follow these steps to export asset properties to a spreadsheet:

1. In a Commerce Assets project, select the assets you want to export. You can select any assets from the Navigation pane or select assets in the current project.

   If you choose to export assets that you have modified in your project, the property values from the version in your project are exported instead of the values from the main version. For more information, see Asset Versioning (page 110).

2. In the Action menu, click Export.

   Merchandising exports only one asset type at a time. If you select more than one type of asset for export (for example, Products and SKUs), Merchandising displays a window where you must select the asset type for this export. For more information, see Exporting Different Types of Assets (page 111).

3. Select Properties in the Export type list.
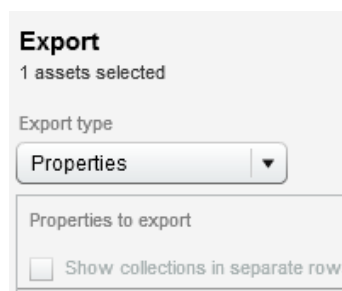
4. In the Properties list, select the properties you want to include in the export.

   The ID property is automatically selected because it is always exported. You cannot deselect it.

   Tip: You could export only the ID property to create a spreadsheet that would be a starting point for an import. See Importing Assets (page 116).

5. Select the format for the export file (XLS or CSV).

6. (Optional) To export a collection property with its contents itemized into rows, select the property and click Show Collections in Separate Rows. You can choose only one property. For more information, see Options for Exporting Collection Properties (page 111).

    Note: Collection properties appear in brackets.

7. (Optional) Click Preview to see a sample of the exported data that shows the first five rows of the spreadsheet. If the preview is not what you expected, you can modify the Properties selections and click Preview again.

8. Click Export.

    Once you click the Export button, the operation cannot be cancelled and you cannot work on other Merchandising tasks until the export is complete.

9. When the export is complete, your browser displays a dialog box where you choose whether to open or save the export file.

    If you click Cancel in this dialog box, the export file is not saved and you must repeat the export procedure.

Exporting Prices

 Follow these steps to export prices to a spreadsheet:

1. In a Commerce Assets project, select the Products or SKUs whose prices you want to export. You can select the assets from the Navigation pane or select them in the current project.

    If you select assets that you have modified in your project, Merchandising exports the prices from the version in your project instead of the values from the main version. For more information, see Asset Versioning (page 110).

2. In the Action menu, click Export.

    Merchandising exports only one asset type at a time. If you select more than one type of asset for export (for example, Products and SKUs), Merchandising displays a window where you must select the asset type for this export. For more information, see Exporting Different Types of Assets (page 111).
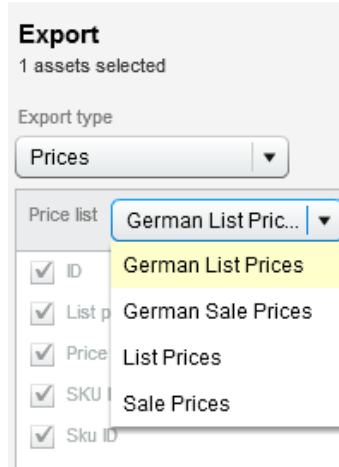
3. Select Prices in the Export type list.

    If you do not see Prices in the Export type list, your administrator may have configured Merchandising to hide price lists in Merchandising, even if your catalog uses them.
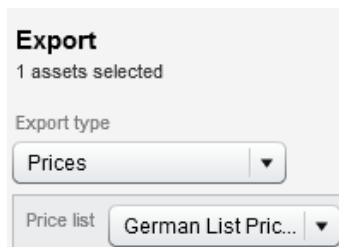
4. Select a price list from which to export prices.

    You can export prices from only one price list at a time.

5. The Properties list displays the price properties Merchandising will export. You cannot deselect any of the properties in this list.

6. Select the format for the export file (XLS or CSV).

7. (Optional) To preview the exported data, click Preview.

    A sample of the exported data appears showing the first five rows of the spreadsheet.

8. Click Export.

    Once you click the Export button, the operation cannot be cancelled and you cannot work on other Merchandising tasks until the export is complete.

9. When the export is complete, your browser displays a dialog box where you choose to open or save the export file.

    If you click Cancel in this dialog box, the export file is not saved and you must repeat the export procedure.

Viewing the Exported Data

Asset data is exported to an XLS or CSV file that can be viewed and edited using a spreadsheet program such as Microsoft Excel. The default file name follows the format `<YYMMDDhhmmss>export.xls|csv`. For example, a CSV file exported January 30, 2011 at 11:43:27 AM is named `110130114327export.csv`.

The exported data follows a specific format that can be used to re-import the spreadsheet to Merchandising. The following figure shows an example:

Row One: Repository, Asset Type, Formatting Options, and Process Messages

The first row is reserved for the repository path and asset type, any formatting options, and any warning or error messages.

- The first column of row one (cell A1) contains the repository path and the asset type separated by a colon. For example: `/atg/commerce/catalog/ProductCatalog:product`

- Columns two through four (cells B1, C1, D1, and E1) contain data formatting options:

  `FORMAT=itemized` indicates that the spreadsheet contains a collection property in itemized format and appears in the second column (cell B1), if applicable.

  If any exported properties contain timestamps, `TIMEFORMAT` appears in the third column (cell C1) and shows the format used for dates with a time stamp, for example, `TIMEFORMAT=MM/dd/yyyy HH:mm:ss`.

  If any exported properties contain dates, `DATEFORMAT` appears in the fourth column (cell 1D) and shows the format used for date values, for example, `DATEFORMAT=dd/MM/yyyy`.

- Messages generated during export processing appear in the fifth column (cell E1), for example "Data exceeds Excel 65535 row limit and was truncated."

Row Two: Property Headings

The second row displays column headings that contain the property names of the exported properties. The ID property is always the first column (cell A2) and is always labeled "ID" regardless of the actual repository name of the ID property. The remaining columns are alphabetical by display name, the same order that is used in the Export dialog box.

Note: Unlike the Export dialog box, the spreadsheet contains the repository name of the property and not the localized display name.

Rows Three and Greater: Asset Data

Asset data begins in the third row and continues for the remainder of the spreadsheet. If an asset does not have a value for a property, the corresponding cell is blank.

Importing Assets

The import feature lets you work with commerce assets outside of Merchandising and import them, in spreadsheet or CSV format, into Oracle Commerce. Importing provides a convenient method for editing assets in batches. You can use the editing features of a spreadsheet application to modify multiple assets and then import all of your changes to an Merchandising project at once.

The import feature is not designed to support an import of your entire catalog, but is best used to edit or add a relatively small number of assets, on the order of thousands, not tens of thousands.

Follow these steps to import assets from a spreadsheet into Merchandising:

1. Create a spreadsheet in the correct format for importing to Merchandising. The supported file types are CSV and XLS. For more information see Exporting Assets (page 109) and Formatting a File for Import (page 117).

2. Load the file and validate that the assets can be imported. For more information, see Validating and Previewing Assets (page 121).

3. Import the spreadsheet. For more information, see Importing Asset Data (page 123).

4. Review the outcome of the import for any errors or warnings. For more information, see Reviewing the Import Final Report (page 124).

5. Review the assets in your project. Revert any changes that you do not want to keep and resolve any version conflicts that might exist. See Removing Assets from a Project (page 8) and Resolving Conflicts with Other Projects (page 10) in Chapter 4.

Import Guidelines and Limitations

This section provides information that helps you plan your import.

Versioning Considerations

You do not have to add assets to a project to import them, but you do have to be working in the context of a project. When you import new and modified assets, Merchandising adds them to your project. Property values for modified assets are updated with the values you import. Unmodified assets are not added to the project.

Merchandising does not export or import asset versioning information. When you export assets that you intend to re-import, be sure that you export the latest version of the asset to avoid accidentally overwriting properties with obsolete values.

If you check out an asset and edit a property value in your project, and then import an updated value for that same property, there is no record of your earlier edits. You can revert changes to the asset, but the properties revert to the values in the main version, not those in your project version prior to import.

Security

To import changes to an asset, you must have Write access for the asset and any changed properties you want to import. Because the export feature requires only list and view privileges, it is possible that you can export an asset but not be able to import that asset. For more information about user permissions, contact your administrator or see *Managing User Access and Security* in the *Content Administration Programming Guide*

Importing Assets in a Multisite Environment

In a multisite environment, each catalog asset is assigned Sites and Parent Categories properties. Merchandising does not import either of these properties for catalog items, but it does import the Sites property for promotions.

Formatting a File for Import

The easiest way to format a file for import is to start by exporting a file from Merchandising that contains the assets you want to modify. You can also manually create the import file starting with a blank spreadsheet. Unlike the export feature, which supports only XLS files, the import feature supports both XLS and CSV formatted files, so you can use any editor that supports CSV files to create the spreadsheet to import.

The following figure shows an example of a spreadsheet formatted for import:

Repository and Asset Type → A1: /atg/commerce/catalog/ProductCatalog:product

Format for timestamp properties → C1: TIMEFORMAT=MM/dd/yyyy HH:mm:ss

This column will not be imported → C2: IGNORE

	A	B	C	D	E
1	/atg/commerce/catalog/ProductCatalog:product		TIMEFORMAT=MM/dd/yyyy HH:mm:ss		
2	ID	displayNameDefault	IGNORE	&fixedRelatedProducts	startDate
3	xprod1007	Braided leather belt	Perfect for your jeans or trousers, this leather belt does it all.		11/01/2008 01:00:00
4	xprod1008	Front buckle bag	Add another element of trendy to your outfit with this embroidered handbag.	xprod1048, xprod1056	11/01/2008 01:00:00
5	NEW	Pearl earrings		xprod1011	01/31/2009 01:00:00
6	xprod1011	Pearl necklace	Made of genuine hand picked freshwater pearls, this is the perfect piece of jewelry for absolutely any outfit.		11/01/2008 01:00:00

This row creates a new product → (row 5, NEW)

These products will be added to the collection → (column D)

Caution: If you leave a cell blank, a property value might be deleted. See Format for Deleting Property Values (page 120).

Required Formats for Importing a Spreadsheet

The first row and first column of the spreadsheet are reserved for use by the import process and must contain specific information. The first row contains information about the data that is being imported and the first column (except for row 1) contains the ID property of the assets being imported.

In the first row of the spreadsheet, you must specify the repository, asset type, and any special formats for data types, as follows:

• The first column of row one (cell A1) must contain the Nucleus path to the repository component and the asset type of the assets in the spreadsheet, as defined in the repository definition. For example:

```
/atg/commerce/catalog/ProductCatalog:product
```

• Use the additional columns in row one (cells B1 through D1) to specify any special property formatting, such as itemized collections or specific date formats. Each format must be in its own cell, but it does not have to appear in any particular order. The formatting options are:

Description	Format in Spreadsheet	Requirements
Itemized collection property (see Options for Exporting Collection Properties (page 111))	`FORMAT=itemized`	Required when importing a map, list, or set property in itemized format. **Caution:** If an itemized import file does not contain `FORMAT=itemized`, then the import task overwrites the value of the collection property each time it encounters the next value. The last item in the itemized list for a collection will be the only item stored for that collection.

Description	Format in Spreadsheet	Requirements
Format of `date` property values, such as 01/31/2009	`DATEFORMAT=MM/dd/yyyy` The day, month, and year indicators can appear in any order to match your data, for example `dd/MM/yyyy`	Required if any imported properties are of type `date`. The date value must exactly match the format, for example `03/15/2009` instead of `3/15/09`.

Format of `timestamp` property values, such as 31/01/2009 22:45:01	`TIMEFORMAT=`
	`MM/dd/yyyy HH:mm:ss`
	
	The day, month, and year indicators can appear in any order to match your data, for example, `dd/MM/yyyy HH:mm:ss`
	
	To use 12-hour time, the format is `MM/dd/yyyy hh:mm:ss aa`, where `aa` can be either AM or PM, for example `03/15/2009 05:30:00 AM`
		Required if any imported properties are of type `timestamp`.
		
		The timestamp value must exactly match the format, for example `03/15/2009 05:30:00` instead of `3/15/09 5:30`.

Beginning with the second row, the first column of the spreadsheet is reserved for the ID property of the imported assets. No other property can occupy column one. The second row (cell A2) contains the ID heading, which is always ID regardless of the actual name of the repository item's ID property. The remaining rows (cells A3 and greater) contain the ID values for each imported asset. Any rows with blank ID values are skipped during import.

Format for Adding New Assets

The import feature allows you to create new assets when you import your spreadsheet. To create an asset, add a row to the spreadsheet and enter property values for each column. If you leave a cell blank, then the value for that property is set to null. If you leave the ID column blank, the asset is skipped and not created.

You assign an ID value for the new asset in one of the following ways:

• Enter `NEW` in the ID column to let the system create an ID

The new asset is created using an automatically generated ID. The `NEW` keyword must be typed in all capital letters and must be the only value in the cell.

• Enter a unique ID in the ID column

A new asset is created with the ID you enter.

Note: To create an asset, you must provide values for required properties.

When you create a new asset for import, be sure to add it before any other assets in the spreadsheet that make use of that new asset. This is because the import task processes the spreadsheet from top to bottom and must create an asset before it can be referenced from another asset. For example, to create a new product and add it to the Related Products property of other products in the spreadsheet, insert the new product row before the rows containing the products that refer to it.

Format for Deleting Property Values

You can delete a property value of an asset when you import the asset to Merchandising. To delete a property value, leave the corresponding cell blank.

Tip: If you delete a cell in the spreadsheet but do not want to delete the property value during import, you can mark the cell as ignored. See Marking Data to Ignore (page 120).

This delete format does not apply when you are adding items to collection properties. If you format a column to prepend or append items to a collection, blank cells are automatically ignored during import (nothing is added or removed from the collection). See Format for Adding Items to a Collection (page 120).

Marking Data to Ignore

When you import a spreadsheet, the file might contain data that you do not want to include in the import, for example, columns with formulas or notes, columns containing a property that you do not want to edit, or blank cells that might cause data to be deleted. To remove these items from the import, you can mark columns (properties), rows (individual assets), or cells (individual property values) to be ignored by the import process.

Use the keyword IGNORE to mark data that you want to ignore during import, as follows:

To ignore this	Do this
Ignore a column of data, such as a single property or extra column	Type the word IGNORE in the column heading (row 2).
Ignore an asset (a single row)	Type the word IGNORE in the ID cell for the asset (column 1).
Ignore a property for an asset (a single cell)	Type IGNORE in the cell.

For data to be ignored, the cell must contain only the single word IGNORE in all capital letters.

Format for Adding Items to a Collection

You can add items to a collection by typing an ampersand (&) before or after the property name in the column heading of a collection property, as follows:

- Insert the ampersand at the beginning of the heading name to prepend items to the beginning of a collection, for example &fixedChildProducts.

- Insert the ampersand at the end of the heading name to append products to the end of a collection, for example fixedChildProducts&.

The prepend and append formats simplify the process of editing collections because you only need to include additional items and not every item in the collection. If you do not use this format, the import process overwrites the collection property with the exact items listed in the spreadsheet.

When you use this format, leave a cell blank to indicate that nothing should be added to the collection. If you have formatted a column to prepend or append items to a collection, blank cells in that column are ignored during import (nothing is added or removed from the collection).

The following figure shows an example of the prepend format used to add products to categories:

	A	B
1	/atg/commerce/catalog/ProductCatalog:category	
2	ID	&fixedChildProducts
3	cat10032	xprod2072,xprod2075
4	cat10018	xprod2072,xprod2075

You can also use prepend and append to add to collections that are in itemized format. The following graphic shows the previous example in itemized format:

	A	B
1	/atg/commerce/catalog/ProductCatalog:category	FORMAT=itemized
2	ID	&fixedChildProducts
3	cat10032	xprod2072
4	cat10032	xprod2075
5	cat10018	xprod2072
6	cat10018	xprod2075

If you already use the ampersand character as part of a collection property name, you can use a different character for appending and prepending items to collections.

Formats Specific to CSV Files

The import feature supports files in CSV (comma-separated values) format in addition to XLS (Microsoft Excel) files. CSV files are text-based files that use commas to separate cells in the spreadsheet. Each new line in the file represents a new row of the spreadsheet. If the value stored in a cell includes commas, such as a collection property, the entire value is enclosed in double-quotation marks to indicate that the commas do not begin a new cell.

If you use Microsoft Excel to create the CSV file, the quotation marks are added automatically when you save the file in CSV format. You cannot see them when you open the file in Excel. You see them only if you edit the file in a text editor, such as Microsoft WordPad.

The following shows an example of a CSV file as it appears in text:

```
/atg/commerce/catalog/ProductCatalog:product, , ,
ID,displayNameDefault,parentCategoriesForCatalog,childSKUs
xprod1009,Terry Gloves,masterCatalog=cat70014,"xsku1032, xsku1033, xsku1034"
xprod1012,Cable knit hat,masterCatalog=cat70014,xsku1040
xprod1010,Shoulder Bag,masterCatalog=cat70014,xsku1038
```

The following figure shows the same CSV file as it appears in Microsoft Excel:

	A	B	C	D
1	/atg/commerce/catalog/ProductCatalog:product			
2	ID	displayNameDefault	parentCategoriesForCatalog	childSKUs
3	xprod1009	Terry Gloves	masterCatalog=cat70014	xsku1032, xsku1033, xsku1034
4	xprod1012	Cable knit hat	masterCatalog=cat70014	xsku1040
5	xprod1010	Shoulder Bag	masterCatalog=cat70014	xsku1038

To avoid errors on import, make sure that the number of commas in rows 3 and greater exactly matches the number of commas in row 2.

Validating and Previewing Assets

When you import a file, Merchandising validates the file, first verifying that the file is formatted correctly and contains data that can be imported, then validating the first 200 assets in the spreadsheet. You can also validate

all assets in the file using the Validate All option. If you receive errors or warnings prior to the actual import, you can stop the task, edit the spreadsheet to remove any errors, and then upload the file again.

To view instructions for importing a file, see Importing Asset Data (page 123).

After passing the validation phases and importing the spreadsheet, Merchandising displays the outcome of the import in a results dialog box. See Reviewing the Import Final Report (page 124).

File Validation

When you select a file for import, Merchandising validates the file format and the formats of the first two rows of the spreadsheet. If there is an error in the file, a message appears on the Import dialog.

Errors that can occur during this phase include the following:

*   The file is not in XLS or CSV format.

*   The repository or asset type in the first column of row 1 is not valid.

*   The first row contains `FORMAT=itemized`, but the file does not contain an itemized collection property.

    Caution: If the file is in itemized format but the first row does not contain `FORMAT=itemized`, the file is valid but it will not be imported as an itemized collection. Instead, the import task overwrites the current value each time it encounters the new item for the collection, and the last item is the only value stored.

*   The file is missing the `ID` column or it is not the first column.

*   Row 2 of the file contains properties that do not exist for this asset type or have a misspelled property name.

*   The file contains properties for which you do not have Write permissions.

*   The file contains properties that are not allowed. These are: derived, transient, non-readable, non-writable, and non-ui-writable properties. See the *Repository Guide*.

    Note: Merchandising does not export these types of properties, so if the spreadsheet contains them, they were added to it manually.

*   The file contains a timestamp or a date property but does not have a corresponding `TIMESTAMP` or `DATE` format in row 1.

Asset Validation

After the file is uploaded and passes file validation, Merchandising validates the first 200 assets and displays the outcome in the Import window.

The validation process determines how many imported assets have changed, how many are new, and how many are unchanged. The preview table lists the status of each validated asset, its ID and imported properties, and marks any values that have errors or warnings. The Status column is blank for items that are unchanged.

To view an error or warning message, place the pointer over the item containing the error or warning.

Errors or warnings that can occur during asset validation include:

*   The value in the spreadsheet cannot be converted to the correct type for a property, for example, a date does not include two digits for the month, or a letter or symbol appears in a numeric property.

*   A value for a required property is missing.

*   A repository ID in a property value cannot be found.

If the unknown ID is for the same type of asset that is being imported, the message is a warning because the asset might be created elsewhere in the spreadsheet. If it is a different asset type, the message is an error.

Note: If the ID column contains a non-existent repository ID, a new asset is created with that ID. See Format for Adding New Assets (page 119).

If your file contains more than 200 assets and you want to validate them all before starting the import process, click Validate All. Otherwise, Merchandising validates any remaining assets as it imports the data and errors or warnings are displayed in the import outcome. See Reviewing the Import Final Report (page 124).

Importing Asset Data

To import asset data into an Merchandising project:

1. Create or open an Merchandising project into which you will import assets. See Project Basics (page 5).

2. Click the Import… button.

3. In the Import dialog, click Browse and locate the XLS or CSV file to import.

4. Click Upload.

   Merchandising validates that the file is formatted correctly.

   • If the file is formatted correctly, it validates and displays the first 200 assets.

   • If the file is not formatted correctly, it displays an error message. Review the error message to determine the cause of the problem, edit the spreadsheet, and return to step 2. See File Validation (page 122).

5. After the file passes validation and the first 200 assets appear in the Import dialog, review the asset preview, and note any errors or warnings.

   • To view the text of an error or warning message, place your pointer over a value that is marked as having an error or warning.

   • If you detect problems in the data, click Cancel, edit your spreadsheet to resolve the issues, and return to step 2.

   Note: Long property values do not display completely in the preview table, however only the display is truncated, and not the value itself. The entire value from the spreadsheet will be imported.

6. (Optional) If the imported spreadsheet contains more than 200 assets and you want to validate the entire spreadsheet prior to import, click Validate All.

   Note: Depending on the size of the spreadsheet, this process could take several minutes to complete.

   The Import dialog displays a preview of the properties that will be imported for each asset and any errors or warnings. The total number of changed, new, and unchanged assets appears at the top of the preview table.

7. When you are satisfied with the preview data, click Import.

Continue to the next section, Reviewing the Import Final Report (page 124), for more information about import results.

The new and changed assets are added to the current project. You can use the Review Changes option to compare the updated property values of an asset to the values in the main version. See Reviewing Changes (page 36).

Reviewing the Import Final Report

After Merchandising imports a spreadsheet, the Import (Final Report) dialog displays the outcome for each asset. The dialog divides the assets into tabs based on the outcome of the import. Each tab lists of assets shows the ID and name of each asset and The possible outcomes are:

• Changed: Shows assets successfully updated with values from the spreadsheet.

• Failed: Shows assets that were not updated during import due to an error.

• New: Shows assets that were created during import.

• Failed New: Shows new assets that could not be created due to an error, such as a missing required property. If you did not supply a new ID in the spreadsheet, then the ID is blank.

• No Change: Shows assets that were not updated because there were no changes to the asset in the spreadsheet. These assets are not added to the project.

To view the property changes for imported assets:

1. Close the Import (Final report) dialog and navigate to the Project tab.

2. Navigate to an imported asset and display its properties in the Details pane.

3. Click Review Changes.

4. Revert any changes you do not want to keep. See Reviewing Changes (page 36).

To retry the import process for assets that did not import successfully

1. Make note of the errors that prevented successful import and close the Import (Final report) dialog.

2. Edit the spreadsheet to correct the errors.

   Note: Remove any assets marked NEW from the spreadsheet that were already successfully imported. Otherwise, the next time you import the spreadsheet, duplicates will be created. If this happens, remove the duplicate assets from the project. See Removing Assets from a Project (page 8).

3. Import the spreadsheet again. See Importing Asset Data (page 123).

19 Creating and Managing Promotions and Coupons

Promotions and coupons allow you to offer discounts on specific products or groups of products. For example, you might decide to promote a range of products for Mother's Day by highlighting them with an image on your site's "Welcome!" page and offering a 10 percent discount if customers order them by a specific date. Or you might want to e-mail new customers a coupon to encourage return visits.

Promotions specify options that define the conditions a customer must meet before qualifying for the discount, and how the discount is applied. For example, you can specify that a customer must purchase an item from the Outerwear category, that they spend more than $50, or that they make their purchase during July. Coupons make promotions available to customers (assuming the promotion conditions are met) when a user enters a coupon code. Creating a coupon involves associating a coupon code with a promotion. Both promotions and coupons can be organized in folders and found through the same searching and filtering controls used by other Merchandising assets See *Merchandising UI Overview* (page 17) and *Creating and Managing Assets* (page 27).

This chapter describes how to create, edit, and work with promotions in Merchandising. It includes the following sections:

How Promotions Work

Promotions are divided into three general types:

- Item Discount Promotions—The customer receives a discount on an item or items.

• Order Discount Promotions—The customer receives a discount to an entire order.

• Shipping Discount Promotions—The customer receives discounted shipping.

After setting up a promotion in Merchandising, decide how to deliver the promotion to users.

• Create a coupon or batch of coupons that grants the promotion to a user profile. A standard coupon has a single associated code that can be used to claim that coupon, which is often widely distributed to customers (a common example is a coupon that grants free shipping to users during the holidays). For situations in which you want to restrict the use of coupons, use a coupon batch; the coupon batch generates a random authentication code for each individual coupon, to ensure that the coupon cannot be passed on to other customers. (For more information, see Using Coupons with Promotions (page 157) in this guide.)

• Create a scenario that determines the visitors who qualify for the promotion. The scenario tells the system how to determine the people that qualify, and then it marks their visitor profiles accordingly by adding the promotion to their `activePromotions` profile attribute. (For more information, see the *Creating Scenarios* chapter in the *Personalization Guide for Business Users*.)

You can also set up promotions that are provided to all customers automatically– for these, you do not need to set up a scenario or a coupon.

When a customer adds an item to their cart or performs any other action that involves requesting a price from the system, Core Commerce checks their visitor profile to see whether they currently qualify to receive any of the promotions you have set up. If a customer qualifies, Core Commerce uses the promotion discounts to calculate the price of the product for the customer, and it adjusts the price accordingly.

You can inform site visitors about promotions in several ways. For example, you could set up a discount for a product without advertising it in any special way; the visitor simply sees the adjusted price when he or she displays the checkout page. You could include some text that describes the offer on, for example, the "Welcome!" page and make that text a link to the regular catalog page for the product. You could use the `GetApplicablePromotions` droplet to identify promotions that apply to particular items, and display this information on the product page. Or you could send an e-mail that describes the promotion, perhaps including a discount coupon code in the message.

Creating Promotions Folders

Promotions folders are used for organizing your promotions. To create a new promotions folder:

1. In the Navigation pane, navigate to Promotions.

2. Click the Create New button, and choose Promotions Folder.
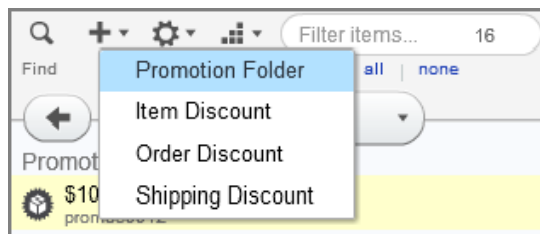
The Details pane displays empty fields you can use to define the promotions folder.

3. Enter a name for the promotions folder in the Name text box (required).

4. Specify the folder's location in the hierarchy by adding, replacing, or removing a parent using the Select button.

   A parent is preselected if you see an asset name beside Select. A promotions folder without a parent resides at the top level of the promotions hierarchy.

5. Click Create.

   In the Navigation pane, the promotions folder displays.
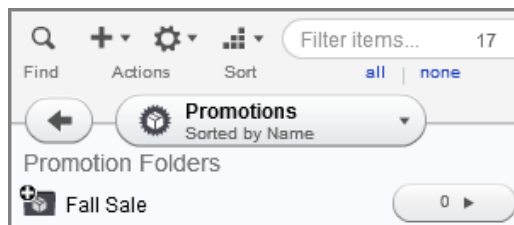
   The Details pane contains the General tab, which shows the properties for the new promotions folder.

Creating Promotions

Merchandising templates provide a quick and easy way to create many common promotion types, such as free shipping and BOGO offers. Like many other assets, promotions use a series of tabs to organize their properties. The sections that follow walk you through each tab and the settings that can be used on them as you create and edit promotions.

To create a new promotion:

1. In a Commerce Assets project, navigate to Merchandising.

2. Select Promotions and Coupons.

3. Select Promotions.

4. From the New Item gear select one of the following, depending on which type of promotion you are creating:

   • Item Discount

- Order Discount

- Shipping Discount

5. Configure the tabs as described in the sections that follow.

6. When you are done with configuration, click Create.

You can also create promotions within a coupon; see Creating Freestanding Coupons (page 158).

General Tab

The General tab provides access to the following promotion settings:

The following table describes the tab's properties:

Property	Description
Promotion Name (required)	A short, descriptive name that will allow you to identify the promotion.
Template	The template provides a starting point for your promotion, and determines what condition and offer options apply. See Condition & Offer Templates (page 130) in this chapter for details on each template.

Property	Description
Condition and Offer	The condition and offer determine how your promotion works: What the qualifying behavior is, what type of discount results, and any exclusions. See Condition & Offer Templates (page 130) in this chapter for details.
Priority	The priority of the promotion. Promotions are applied in order of priority, with low priority numbers applied first. Engines sort the promotions by the value of this property. Note that a promotion's priority is secondary to the promotion type. For example, you can specify how a given Item Discount promotion is applied compared to other Item Discount promotions, but not the order in which Item Discounts are applied compared to Shipping Discounts.
Description	Promotion description.
Enable Promotion Upsells	Indicates whether or not the promotion uses promotion upsells; the default is True. Promotion upsells allow you to notify users when they are close to qualifying for a promotion. For example, you might set up your page to inform the customer that if they spend five more dollars, they qualify for free shipping.
Promotion Upsells	If promotion upsells are enabled, list the upsells available to this promotion. If you are editing an existing promotion, you can click the upsell message to edit the promotion upsell. (See the following table for Promotion Upsell properties.)
Parent Folder	This defaults to the folder in which you created the promotion. You can select a different existing folder or create a new folder in which to store the promotion.
Enabled	Indicate whether or not this promotion can be used with a qualifying order. The default is True, but note that this also depends on any dates you set in the Availability tab. If Enabled is False, the promotion cannot be used regardless of the Availability tab dates.

The following table describes promotion upsell properties.

Property	Description
Message (Required)	Message to display to the customer when the upsell is triggered. For example, "Nearly there!"
Condition (Required)	Condition under which the upsell prompts the customer. For example, if you have a "buy three get one free" promotion on T-shirts, you might want to trigger a promotion upsell with the following condition: "When order contains exactly 2 products in category Tees"

Property	Description
Media	Any media associated with the promotion upsell.
Product Upsell (Optional)	A list of products that can be used as part of closeness qualifier messaging. For example, if you want to promote a line of luggage, you may add them to the product upsell list, then use them in product pages, e-mails, or other communications when a customer is close to qualifying for a promotion. **Note:** If you are creating the promotion upsell within a condition and offer template (such as Buy Item X Get Item Y (page 132)), this field is not visible. It can be accessed on the General Tab.

Condition & Offer Templates

The condition and offer property editor appears on the General tab. Different templates are available depending on the type of promotion; for example, you cannot use the BOGO condition and offer template as part of a shipping promotion.

Although they appear in the same template lists, Gift with Purchase promotions have several unique features that are not shared by other templates, and are discussed separately. See Creating Gift with Purchase Promotions (page 149) for information on this promotion type.

The Advanced Condition & Offer gives you the flexibility to create unique promotions not covered by templates. You can convert any template-based condition and offer to an advanced condition and offer; note, however, that you cannot convert an advanced condition and offer to a template. See Creating Advanced Condition and Offer Statements (page 154).

With the exception of Gift with Purchase promotions, items with $0.00 price are not allowed to be the target of a promotion.

Note that you can include non-discountable products and SKUs in the condition statement. If you include a non-discountable product or SKU in the offer statement, however, you will see a warning. You can offer a non-discountable product as a gift in a Gift with Purchase promotion.

Non-discountable products and SKUs never receive discounts via promotions Non-discountable products affect only item and order promotion types; shipping discounts are not affected by non-discountable products. See *Creating and Managing Products* (page 73) and *Creating and Managing SKUs* (page 79) for details on how to create non-discountable products and SKUs.

BOGO (Buy One Get One)

This popular type of promotion discounts an item when a customer buys a similar item. A common condition is that the customer buys one or more items in a particular category, such as shoes, and receives a discount on a second item in that category.

First, set up the condition parameters. The following table describes condition properties.

Property	Description
Number of items to buy	How many items the customer must purchase in order to receive the discount. This quantity must be at least 1.
Item(s) to buy	If you do not want the promotion to apply to all purchases, specify the categories, products, etc. that qualify. You can add additional criteria as needed and combine them in either AND (the purchase must meet all criteria) or OR (the purchase must meet at least one criterion) form.

Next, specify the offer. The following table describes the offer properties.

Property	Description
Number of items to discount	For a traditional "buy one, get one" promotion, enter 1; for each item the customer purchases, one item is discounted. You can discount any number of items, however, or check Unlimited to apply the promotion to all items once the promotion condition has been met.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item. If the Discount Type is Free, this field is disabled.

Buy Item X Get Item Y

This promotion discounts a specified set of products when the customer purchases another specified item.

First, set up the condition parameters. The following table describes the condition properties:

Property	Description
Number of items to buy	How many items the customer must purchase in order to receive the discount. This quantity must be at least 1.
Item(s) to buy	If you do not want the promotion to apply to all purchases, specify the categories, products, etc. that qualify. You can add additional criteria as needed and combine them in either AND (the purchase must meet all criteria) or OR (the purchase must meet at least one criterion) form.

To exclude items from the condition (that is, they won't help the customer qualify for the promotion), click the Add Criteria button under the Items to Exclude area.

Next, specify the offer. The following table describes the offer properties:

Property	Description
Number of items to discount	You can discount any number of items, or check Unlimited to apply the promotion to all items once the promotion condition has been met.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.

Property	Description
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item.

To exclude items from the offer (that is, they will not receive a discount), click the Add Criteria button under the Items to Exclude area.

Buy Within Specified Time Frame Get Item Discount

This promotion discounts a particular item or items when the customer places an order within the specified time period.

First, specify the start and end dates for the condition. In the case of this promotion, these fields are the equivalent of the usage start and end dates; if you change one set of dates, the other set updates automatically.

Next, specify the offer. The following table describes the offer properties:

Property	Description
Number of items to discount	You can discount any number of items, or check Unlimited to apply the promotion to all items once the promotion condition has been met.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item.

To exclude items from the offer (that is, they will not receive a discount), click the Add Criteria button under the Items to Exclude area.

Get Item Discount (by Product, Category, Brand, etc.)

This promotion discounts a specific set of products, which could include a single item, a category, a brand, etc. The discount has no other conditions, although you can specify that it be applied only to a specific quantity of an item.

Since the condition is already defined by the template, you only need to specify the details of the offer:

The following table describes the offer properties:

Property	Description
Number of items to discount	Enter the number of items that can receive the discount, or check Unlimited. For instance, if a customer purchases six items in the discounted category, you might discount five of them.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item.

To exclude items from the discount, click the Add Criteria button under the Items to Exclude area. For instance, you may want to discount all items in a category except for a specific brand.

Spend Y Get Item Discount

This promotion discounts a particular item or items when a customer spends the specified amount.

First, specify the Spend threshold for the condition.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsells part of the General tab. Note that the promotion upsell section only appears in the condition and offer template when you first create the promotion. To edit a promotion upsell, use the Promotion Upsells section of the promotion's General tab.

Next, specify the offer.

The following table describes the offer properties:

Property	Description
Number of Items to Discount	Enter the number of items that can receive the discount, or check Unlimited. For instance, if a customer purchases six items in the discounted category, you might discount five of them.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item.

To exclude items from the discount, click the Add Criteria button under the Items to Exclude area. For instance, you may want to discount all items in a category except for a specific brand.

Spend Y in X Get Item Discount

This promotion discounts a particular item or items when a customer spends the specified amount in the specified product areas. Note that this is different from the Spend Y Get Order Discount (page 142) promotion. A Spend Y promotion looks only at the total amount spent on the order to determine whether the customer qualifies for the promotion, while the Spend Y in X examines the individual items in the shopping cart. Therefore the two promotion types do not behave identically.

First, specify the Spend threshold and the Spend in options for the condition. The Spend in criteria can be categories, products, or specific SKUs. You can refine the condition by adding more criteria.

Note that any products that fit into the product areas defined by the Spend in criteria are not able to receive any discounts once the promotion criteria are met. For example, you might create a "Spend $100 in Accessories, Get $5 off a Throw Pillow" promotion. Throw pillows are a subcategory of accessories. If the customer spends $100 on throw pillows, none of those pillows receive the $5 discount, since that would mean that the customer no longer met the original qualification for the promotion.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsell part of the General tab. Note that the Promotion Upsell section only appears in the condition and offer template when you first create the promotion. To edit a promotion upsell, use the Promotion Upsell section of the promotion's General tab.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Number of Items to Discount	Enter the number of items that can receive the discount, or check Unlimited. For instance, if a customer purchases six items in the discounted category, you might discount five of them.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item.

To exclude items from the discount, click the Add Criteria button under the Items to Exclude area. For instance, you may want to discount all items in a category except for a specific brand.

Get Group Discount

The Get Group Discount template allows you to define a group of items that can be used as the offer for a promotion. It also creates a promotion that offers a fixed price or discount that is applied to an entire group of items. The group discounts are limited to items, and cannot be applied to order or shipping discount promotions.

Note that if any of the products or SKUs within the group of items is flagged as non-discountable, the group discount cannot be applied and no discount is granted.

Because group discount promotions are always applied, there are no qualifying conditions and you only need to specify the details of the offer:

As displayed in the preceding illustration, you configure Group Discount promotions using multiple Product Selection Criteria. This allows you to add multiple items to the group discount promotion.

The following table describes the offer properties:

Property	Description
Quantity	Identifies the number of items to which this specific offer applies. Quantities must be at least 1 for each item. Quantities cannot be set to 0.
Apply Discount To	Allows you to select whether the discount should be applied to the lowest or the highest priced items in the order first.
Match	Match All indicates that all items that you add to the criteria must match. Match Any indicates that any of the items added to the criteria can match.

Property	Description
Add Item	This button allows you to add an additional item, adding another criteria to the promotion. All Product Selection Criteria is inclusive, indicated by "-AND-".
Discount Type	This drop down menu allows you to select the amount off, percentage off or fixed group price.
Discount	Enter the amount or percentage of the discount. If the Discount Type is Fixed Group Price, enter the price of the group.

To exclude items from the discount, click the Add Criteria button under the Items to Exclude area. For instance, you may want to discount all items in a category except for a specific brand.

Avoiding Conflicting Targets

When creating a group discount, you must take care to avoid possible conflicts of item qualifications. For example, you create a group discount promotion that activates when a user buys any item from the Lamp category and either the Antique Table Lamp, or Traditional Bedside Lamp. The promotion would be similar to:

Buy 1 item from the Lamps Category
-and-
Buy 1 Antique Table Lamp OR Traditional Bedside Lamp.

When a customer adds 1 Antique Table Lamp and 1 Classic Desk Lamp to their shopping cart, the group discount will not apply. This is because the Antique Table Lamp will satisfy the "Buy 1 item from the Lamps Category" but the Classic Desk Lamp will not satisfy the "Buy 1 Antique Table Lamp OR Traditional Bedside Lamp" criteria. The system cannot identify which item should be applied to which criteria.

To avoid conflicts like this, you must provide more detailed information when selecting the promotion criteria. The promotion would best be defined as:

Buy 1 item from the Lamps Category
Excluding Antique Table Lamp, Traditional Bedside Lamp
-and-
Buy 1 Antique Table Lamp OR Traditional Bedside Lamp

This promotion excludes the Antique and Traditional Bedside Lamps from the "Buy 1 item from the Lamps Category" criteria, allowing them to be used in the second criteria.

Tiered Price Break

Tiered price breaks allow you to apply different levels of discount when customers buy multiple items. Since the condition is already defined by the template, you only need to specify the details of the offer:

First, select the items that are eligible for the discount.

The following table describes the offer properties:

Property	Description
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Discount Type	Select amount off, percentage off, fixed item price, or free.

Then define the tiers. The example shown earlier in this section defines tiers such that a customer who buys two chairs receives a 10% discount. If the customer buys four chairs, they receive a 20% discount on all four items.

Buy Within Specified Time Period

This promotion discounts an entire order when the customer places the order within the specified time period.

First, specify the start and end date and time for the condition. These are the same as the promotion start and end dates set on the Availability & Coupons tabs. If you are using the Redeemable For setting with an expiration date, you do not need to set start and end dates.

Next, specify the offer. The following table describes the offer properties:

Property	Description
Discount Type	Select amount off or percentage off.
Discount	Enter the amount of the discount.

Buy X Get Order Discount

This promotion discounts an entire order when the customer purchases the specified item or items.

First, set up the condition parameters:

The following table describes the condition properties:

Property	Description
Number of items to buy	How many items the customer must purchase in order to receive the discount. This quantity must be at least 1.
Item(s) to buy	If you do not want the promotion to apply to all purchases, specify the categories, products, etc. that qualify. You can add additional criteria as needed and combine them in either AND (the purchase must meet all criteria) or OR (the purchase must meet at least one criterion) form.

To exclude items from the condition (that is, they won't help the customer qualify for the promotion), click the Add Criteria button under the Items to Exclude area.

Next, specify the offer. The following table describes the offer properties:

Property	Description
Discount Type	Select amount off or percentage off.
Discount	Enter the amount of the discount.

Get Order Discount

This promotion discounts an entire order; no other conditions apply, so you only need to specify the offer details:

The following table describes the offer properties:

Property	Description
Discount Type	Select amount off or percentage off.
Discount	Enter the amount of the discount.

Spend Y Get Order Discount

This promotion discounts an entire order when the customer spends the specified amount in the specified areas.

First, specify the Spend threshold for the condition.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsells part of the General tab.

Next, specify the offer. The following table describes the offer properties:

Property	Description
Discount Type	Select amount off or percentage off.
Discount	Enter the amount of the discount.

Spend Y in X Get Order Discount

This promotion discounts an entire order when the customer spends the specified amount in the specified product areas.

First, specify the Spend threshold and the Spend in options for the condition. The Spend in can be categories, products, or specific SKUs. You can refine the Spend in by adding more criteria to the condition.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsells part of the General tab.

Next, specify the offer. The following table describes the offer properties:

Property	Description
Discount Type	Select amount off or percentage off.
Discount	Enter the amount of the discount.

Tiered Order Discount

Tiered price breaks allow you to apply different levels of discount when customers buy multiple items. Since the condition is already defined by the template, you only need to specify the details of the offer:

First, specify the discount type. Select amount off or percentage off. Then define the tiers:

In the example shown, if customers buy 10 items they receive 5% off their order total; if they buy 20 items, they get 15% off.

Buy Within Time Period Get Shipping Discount

This promotion discounts shipping when the customer places the order within the specified time period.

First, specify the start and end dates for the condition. In the case of this promotion, these fields are the equivalent of the usage start and end dates; if you change one set of dates, the other set updates automatically.

Next, specify the offer. The following table describes the offer properties:

Property	Description
Discount Type	Select amount off or percentage off.
Discount	Enter the amount of the discount.

Buy X Get Shipping Discount

This promotion discounts shipping costs when the customer purchases a specified item or items.

First, set up the condition parameters. The following table describes the condition properties:

Property	Description
Number of items to buy	How many items the customer must purchase in order to receive the discount. This quantity must be at least 1.
Item(s) to buy	If you do not want the promotion to apply to all purchases, specify the categories, products, etc. that qualify. You can add additional criteria as needed and combine them in either AND (the purchase must meet all criteria) or OR (the purchase must meet at least one criterion) form.

To exclude items from the condition (that is, they won't help the customer qualify for the promotion), click the Add Criteria button under the Items to Exclude area.

Next, specify the offer. The following table describes the offer properties:

Property	Description
Discount Type	Select amount off, percentage off, fixed shipping price, or free.
Discount	Enter the amount of the discount. If you selected fixed shipping price, enter the shipping price to use.

Get Shipping Discount

This promotion discounts shipping for all orders, with no other condition. Specify the offer. The following table describes the offer properties:

Property	Description
Discount Type	Select amount off, percentage off, fixed shipping price, or free.
Discount	Enter the amount of the discount. If you selected fixed shipping price, enter the shipping price to use.

Spend Y Get Shipping Discount

This promotion discounts shipping when the customer spends the specified amount.

First, specify the Spend threshold for the condition. Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsells part of the General tab.

Next, specify the offer. The following table describes the offer properties:

Property	Description
Discount Type	Select amount off, percentage off, or free.
Discount	Enter the amount of the discount

Spend Y in X Get Shipping Discount

This promotion discounts shipping when the customer spends the specified amount in the specified product areas.

First, specify the Spend threshold and the Spend in options for the condition. The Spend in condition can be categories, products, or specific SKUs. You can refine the Spend in condition by adding more criteria.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsell part of the General tab.

Next, specify the offer:

· Discount Type—Select amount off, percentage off, or free.

· Discount—Enter the amount of the discount

Availability & Coupons Tab

When you configure a promotion, you define the promotion's lifecycle. Click the promotion's name and update the properties that determine when a promotion is active and usable.

Note: Availability is also affected by the Enabled property on the General tab. If a promotion is disabled, the promotion is not usable even if it is within the availability period you specify.

The following table describes the tab's properties:

Property	Description
Promotion Availability (Required)	Whether the promotion is available to all customers, can be used only with a coupon or scenario, or is available to registered customers. The default is "Requires a customer action (any user)."
Usage Period (Optional)	You can define the promotion's usage period either with a start and end date, or as a period of time starting from the moment the customer receives the promotion (for example, creates a customer profile). Promotions with no usage period expire only when they are disabled.
Shipping Groups (shipping promotions only)	Specify whether the promotion applies to all of the customer's shipping groups, or only to the first shipping group. For example, you might want to offer free shipping, but if the customer is shipping items to three different locations, only the first shipment is free.
Coupons (Optional)	This option is only visible if you have selected one of the "Requires a customer action" options under Promotion Availability. Specify which existing coupons can be used for the promotion, or create a new coupon.

Property	Description
Give to a Customer More Than Once (Required on "Requires a…" promotions)	Specify whether or not a customer can receive the promotion multiple times. The default is No.
Max Uses per Customer (Required on "Requires a…" promotions)	Specify the number of orders on which the customer can use the promotion once it has been granted. The default is 1.
Max Uses per Order	Specifies the number of coupons that can be used per order.
Stacking Rule	Stacking rules allow you to control which promotions can be used together. See Managing Promotions with Stacking Rules (page 161) for details. You can associate a promotion with a stacking rule through the promotion itself (using this tab) or through the stacking rule asset type. You can also use the stacking rules section of the Availability & Coupons tab to specify promotions that can or can't be used with the current promotion.
Promotions to Exclude	This property allows you to specify promotions that can never be used with this promotion. Note that in order for the exclusion to work, the excluded promotion must have a lower priority than the promotion that is excluding it. See Managing Promotions with Stacking Rules (page 161) for details.
Promotions to Include	This property allows you to specify promotions that can be used with this promotion. Note that exclusions always take precedence over inclusions; once a promotion has been specifically excluded either specifically through Promotions to Exclude or through stacking rules, it **cannot** be re-included by another rule or by Promotions to Include. See Managing Promotions with Stacking Rules (page 161) for details.

Sites Tab

In a multisite environment, you can use the Sites tab to specify that a promotion only applies to items purchased from specific sites. For example, if you have a site focused on seasonal items, you may want to apply a promotion only to items sold on that site. The Sites tab is available only if you have more than one registered site configured. See the *Multisite Administration Guide* for information on multisite features.

You can select individual sites, site groups, or a combination of groups and sites. Note that if you select both a site group and a site within that group, the site does not act as a restriction; all sites in that group are eligible for the promotion. If you do not select anything on the Sites tab, the promotion is valid on all sites.

If you have specified site membership as part of your condition or offer criteria on the General tab, you are responsible for ensuring that any site or site group selection on the Sites tab does not conflict with that condition. If a condition or offer depends on a site that is not valid for the promotion, the customer cannot qualify for that promotion.

On the Sites tab, you can set the following properties:

Property	Description
Site restrictions	Specify whether the promotion applies on all sites (default), or if it is restricted to sites or groups that you specify.
Sites	Select sites on which the promotion can be used.
Site groups	Select site groups on which the promotion can be used.

Note: If you add or remove site restrictions, the Site restrictions property does not appear in the Review Changes dialog, though the updated Sites or Site groups properties do. To revert site restriction changes, select the Sites or Site groups property from the list. For more information, see Reviewing Changes (page 36).

Catalog Media Tab

The Catalog Media tab allows you to associate images with your promotion for display on product pages, e-mails, and other communications. All promotion types have the same set of media properties: a thumbnail image, small image, large image.

For details about working with Media properties, see *Creating and Managing Catalog Media Assets and Folders* (page 101).

Advanced Filters

The Advanced tab allows you to configure filters that restrict how promotions are applied to items. Some filters can apply to any promotion type; others apply to only item type promotions.

Advanced filters change whether items are considered when determining whether a particular shopping cart qualifies for a promotion. Filter settings can be changed as part of your Commerce application (see the *Qualifier Class* chapter of the *Commerce Programming Guide* for details). Merchandising reads the settings that are in place in your Commerce application and uses those as the default. You can override those settings for individual promotions.

The default setting for all advanced filters is to inherit the Commerce application settings. Once you have selected an override setting for a filter, that setting is used regardless of any changes that are made to the filters in the Commerce application.

Note: Advanced filter settings are included when you import or export promotions. In the import or export file, a blank (null) value indicates that the filter uses the Commerce application setting.

Filters that apply to condition statements are described in the table that follows.

Filter Name	Description
Discounted Items (Any promotion)	If true, items that have already been discounted by **any** promotion cannot be a target of this promotion.

Filter Name	Description
Discounted Items (Current Promotion)	If true, items that have already been discounted by the current promotion cannot be a target of this promotion. This filter applies only to item promotions, and cannot be used with order or shipping promotions.
Items on Sale	If true, items that have the On Sale property set to Yes cannot be a target of this promotion.
Items with Zero Prices	If true, items with a price of $0.00 cannot be a target of this promotion.
Items with Negative Prices	If true, items with a negative price cannot be a target of this promotion.

Filters that apply to condition statements are described in the table that follows.

Filter Name	Description
Qualified Items	If true, items that have already acted as qualifiers for any promotion cannot be used to qualify for this promotion.
Discounted Items (Any Promotion)	If true, items that have already been discounted by **any** promotion cannot be used to qualify for this promotion.
Discounted Items (Current Promotion)	If true, items that have already been discounted by this promotion cannot be used to qualify for this promotion.
Items on Sale	If true, items that have the On Sale property set to Yes cannot be used to qualify for this promotion.
Items with Zero Prices	If true, items that have a price of $0.00 cannot be used to qualify for this promotion.
Items with Negative Prices	If true, items that have a price less than $0.00 cannot be used to qualify for this promotion.
Items with Price Lower than Promotion Price	Applies to fixed-price promotions only. If true, if the item's price is already less than the price after applying the promotion, that item cannot be used to qualify for this promotion.

Creating Gift with Purchase Promotions

Gift with purchase promotions are a special promotion type that allows you to give customers a free item as part of their order.

Free gift criteria can be specified as any of the following asset types:

- SKU

- Product

- Category

- Content group

SKU bundles cannot be used as gift items.

When a customer's order qualifies for the gift with purchase promotion, one of two things can happen:

- If no item in the cart meets the gift item criteria and the promotion does not provide any gift selection choices, the gift item is automatically added to the cart. If the promotion does provide choices, a placeholder is automatically added to the cart, and the customer can select their gift later. Whether added automatically or selected, these gift items cannot be used to qualify for any other promotions.

- If the gift item is already in the customer's cart, the item is repriced to be free. These manually-added items could have been used to qualify for other promotions, but once they are repriced, they can no longer do so.

Keep in mind that if you offer multiple potential items as gifts, your store pages must be coded to include a way for the customer to select a gift. See the *Guide to Setting Up a Store* for information and examples.

If a customer changes their order so it no longer qualifies for the promotion, you can configure the behavior per promotion using the Auto-Remove from Cart setting. If Auto-Remove from Cart is set to Yes, gift items that were automatically added to the cart (or selected from an automatically-provided option) are automatically removed if the cart no longer qualifies. If Auto-Remove from Cart is set to No, gift items that were automatically added are repriced at their usual price.

Items that were manually added to the cart are always repriced at their normal price, and are never removed.

Removing and Re-Adding Gift Items

If the customer qualifies for a free gift and the gift is added to the cart, the customer can manually remove the gift (perhaps the customer has no interest in the free item). In this case, the gift item or placeholder is not automatically re-added while the cart qualifies for the promotion. If a free gift is manually removed from the cart, but some other manually added item already in the cart meets the gift criteria, the remaining item is repriced to free.

Manually removed gift items can be reclaimed manually; the item will be repriced to free as long as no other item has taken the gift item's place. Items can also be re-added by un-qualifying and requalifying for the promotion. Note that this case may be difficult for shoppers to understand unless you provide information in the shopping cart.

Condition & Offer Templates for Gift with Purchase

The Condition and Offer property editor appears on the General tab. See Condition & Offer Templates (page 130) for information on templates for other promotion types.

There are two ways you can approach gift with purchase promotions:

- Gift items are not available for purchase and always have $0.00 price

- Gift items are available for purchase and have a price, but are discounted to free when the order qualifies for the promotion

The default configuration assumes that gift with purchase items have a non-zero price. If you want your gift with purchase items to be zero-priced, you must set the `filterTargetForZeroPrices` property of the `Qualifier` component to false. See the *Qualifier Class* chapter of the *Core Commerce Programming Guide* for information. Bear in mind that you must code your shopping cart pages so that customers cannot increase the quantity of the zero-priced item, and that other zero-priced items that are not gifts will not be filtered when applying promotions.

The difference between zero-price and non-zero-price gift items becomes important when a customer returns an item that qualified their order for the gift with purchase. Consider the following scenarios when a customer places an order and receives a gift with their purchase:

- The gift has zero price. The customer returns the qualifying item for full price and keeps the gift item. This scenario may be acceptable if the gift item is a small sample or other item that would not normally be returnable on its own, but may not be acceptable if the item is normally available for purchase.

- The gift has a non-zero price. The customer returns the qualifying item. Their order no longer qualifies for the gift, and is repriced. Any refund or exchange takes the actual cost of the gift item into account.

Get Gift with Purchase

This promotion provides the customer with a free gift when the customer makes any purchase. For example, "Get a free votive candle with any purchase."

This promotion can only apply once to a given shopping cart. The template prevents gift items from also acting as qualifiers for the promotion; to continue with our example, if the customer's cart contains only a single votive candle, that candle is not repriced to free. However, if the customer places another non-gift item in the cart, the non-gift item qualifies that customer for the promotion, and the votive candle is repriced to free.

Specify the offer. The following table describes the offer properties:

Property	Description
Gift with Purchase	The free gift item.
Auto Remove from Cart?	Specify whether gift items that were automatically added to the cart should be automatically removed if the cart no longer qualifies.

Buy Item X Get Gift with Purchase

This promotion provides the customer with a free gift when the customer buys a specific item. For example, "Buy any pair of shoes, get a free pack of socks."

This promotion can only apply once to a given shopping cart; if shoppers add two of the qualifying item, they still only receive one gift item.

In addition, the template prevents gift items from also acting as qualifiers for the promotion. For example, you could set up a promotion that offers a free pair of Brand X gloves with the purchase of any gloves. If the customer adds Brand X gloves to the cart, they do not qualify for the promotion, because the free item cannot

be used to qualify. (If you want to set up a buy one, get one promotion type, see the BOGO (Buy One Get One) (page 130) template.) If the customer adds a different brand of gloves, they qualify for the Brand X promotion.

First, set up the condition parameters. The following table describes the condition properties:

Property	Description
Number of items to buy	How many items the customer must purchase in order to receive the gift item. This quantity must be at least 1.
Item(s) to buy	If you do not want the promotion to apply to all purchases, specify the assets that qualify. You can add additional criteria as needed and combine them in either AND (the purchase must meet all criteria) or OR (the purchase must meet at least one criterion) form.

To exclude items from the condition (that is, they won't help the customer qualify for the promotion), click the Add Criteria button under the Items to Exclude area.

Next, specify the offer. The following table describes the offer properties:

Property	Description
Gift with Purchase	The free gift item.
Auto Remove from Cart?	Specify whether gift items that were automatically added to the cart should be automatically removed if the cart no longer qualifies.

Spend Y Get Gift with Purchase

This promotion provides the customer with a free gift when the customer spends a specified amount of money. For example, "Spend $50, get a free movie ticket." Note that this promotion behaves likes the Spend X in Y promotion in that it examines the individual items in the shopping cart, not the order total. Products identified as gifts do not count toward the Spend Y total.

This promotion can only apply once to a given shopping cart; if shoppers add two of the qualifying item, they still only receive one gift item.

First, specify the Spend threshold for the condition.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsells part of the General tab. Note that the promotion upsell section only appears in the condition and offer template when you first create the promotion. To edit a promotion upsell, use the Promotion Upsells section of the promotion's General tab.

Next, specify the offer. The following table describes the offer properties:

Property	Description
Gift with Purchase	The free gift item.
Auto Remove from Cart?	Specify whether gift items that were automatically added to the cart should be automatically removed if the cart no longer qualifies.

Spend Y in X Get Gift with Purchase

This promotion provides the customer with a free gift when the customer spends a specified amount of money in the specified product group. For example, "Spend $300 in the Home Accents category, receive a free area rug."

This promotion can only apply once to a given shopping cart; if shoppers add two of the qualifying item, they still only receive one gift item. The template prevents gift items from also acting as qualifiers for the promotion.

For example, you set up a promotion in which customers who spend $200 in Home Accents receive a particular lamp. The customer adds items to their cart, including that lamp. The cart total is $200, but the lamp is removed because it is the target of the promotion. The customer must add other items to qualify for the promotion, at which point the lamp is repriced to free.

First, specify the Spend threshold and the Spend in options for the condition. The Spend in can be categories, products, or specific SKUs. You can refine the Spend in by adding more criteria to the condition.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsells part of the General tab.

To exclude items from the condition (that is, they won't help the customer qualify for the promotion), click the Add Criteria button under the Items to Exclude area.

Next, specify the offer. The following table describes the offer properties:

Property	Description
Gift with Purchase	The free gift item.
Auto Remove from Cart?	Specify whether gift items that were automatically added to the cart should be automatically removed if the cart no longer qualifies.

Creating Advanced Condition and Offer Statements

Advanced conditions and offers are quasi-mathematical expressions that can be used as part of an item, order, or shipping promotion. Rather than providing a template of preselected properties, an advanced condition and offer statement allows you to build any combination of condition and offer criteria necessary for your promotion.

To build statements, select an item type (such as Product), then select and operator and matching values. You can use parentheses, AND, and OR joins to group statements logically. The final part of any advanced condition and offer statement must be End.

You can start a promotion using a template and convert it to an advanced condition and offer. The converted promotion keeps any criteria you have already set, and allows you to add whatever is not included in the template.

To create an advanced promotion:

1. Create a new item, order, or shipping promotion as usual.

2. Click in the Condition and Offer section to activate it.

3. Click Add.

4. Click Create Advanced Condition & Offer.

5. Create the condition for your promotion.

Specify whether items that qualify a customer for a promotion can also be considered targets for the promotion.

You can use AND and OR links to chain together as many statements as necessary for your promotion.

Note: In addition, if the qualifier and target items for a promotion overlap, and if you have selected No discounts on qualifier items, you may see unexpected behavior in your promotions. For example, you may create a promotion "Buy 1 hat, get a gift from the accessories category." The customer adds a hat to the cart. Because hats belong to the accessories category, it is eliminated from consideration as a qualifying item, and the gift is not added to the cart. If the customer goes on to add a pair of gloves, those are treated as the target, and the hat is a qualifier; the gloves are re-priced as free.

Click the dropdown arrow to display a list with the options Always, When, and For Next.

*   Always indicates that there are no conditions that must qualify for the user to receive this promotion.

*   When displays a series of conditions that appear as a sentence. The items you see in the rule are the first item in a dropdown menu from which you can select a different item. Sometimes an item will be an empty space that you fill in by selecting a repository item or entering text.

*   For Next indicates that there are criteria that must be met for the promotion to apply. You are presented with the option of Every or Up To, which allow you to indicate the number of times that the system checks to see if a promotion should be run. For example, if you have an order that includes three t-shirts, and you create a promotion that says For Next and Every and create a discount of 10% for t-shirts, each t-shirt will be discounted 10%. If you create a promotion that says For Next and Up To 2 Maximum, only two of the three t-shirts will be discounted.

Note that if you start the condition phrase with "When," the items specified can also be used to qualify for other promotions. If you start the phrase with "For," the items cannot be used to qualify for any other promotions.

Also note that if your condition phrase is based on "order contains only," it is possible for an empty cart to qualify for a promotion if qualifier items have been filtered out previously. Qualifier items could be filtered out by previously-applied promotions or due to the "No discounts on qualifier items" constraint.

Warning: If you are creating a Gift with Purchase promotion, be aware that target gift items can qualify for their own promotions unless you specifically exclude them. The provided Gift with Purchase templates prevent this, but if you are creating an Advanced condition, be aware that this case is possible; always use For conditions for Gift with Purchase.

Note that discount rules can incorporate complex and/or statements that designate an order of operations using parentheses. The rule wizard will sometimes include parentheses automatically to organize items into phrases.

At the end of most rules, you'll see a parenthesis. If you want to add a new phrase to a rule, click the last element and select either *and* or *or*.

6. Check the No discounts on qualifier items box if you do not want items that can be used to qualify for the promotion to also be eligible for discounts.

7. Create the offer for your promotion. The offer options depend on the type of promotion. Set some or all of the following:

The following table describes the offer properties:

Property	Description
Offer Type	Select Standard, Tiered, or Gift with Purchase.
Items to discount	Creates a rule similar to the condition statement, which identifies items eligible for the discount.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item.

Property	Description
Gift with Purchase	If you are creating a Gift with Purchase promotion, specify the gift item or items. If you provide a single gift item, it is automatically added to the customer's cart once the cart qualifies for the promotion. If you specify more than one possible gift, the shopper receives all gifts.
Auto Remove from Cart?	If you are creating a Gift with Purchase promotion, specify whether gift items that were automatically added to the cart should be automatically removed if the cart no longer qualifies.

Note: If you have created your own templates or manually editing the PMDL, it is possible for you to create a condition and offer that do not conform to the PMDL syntax. If you attempt to view a promotion that has invalid PMDL, Merchandising displays the raw PMDL that includes the error.

Rules with errors cannot be displayed in editable form; however, by viewing the PMDL you may be able to locate the problem. If an error occurs, your administrators can extract the PMDL from the repository and correct the error manually.

Using Coupons with Promotions

You can create coupons using the Availability & Coupons tab of a promotion, or you can create them independently and link them to promotions at some later point, either through the coupon or through the promotion.

Creating Coupon Folders

Coupon folders are used for organizing your coupons. To create a new coupon folder:

1. In a Commerce Assets project, navigate to Merchandising.

2. Select Promotions and Coupons.

3. Select Coupons.

4. Click the Create button in the toolbar and select Coupon Folder.
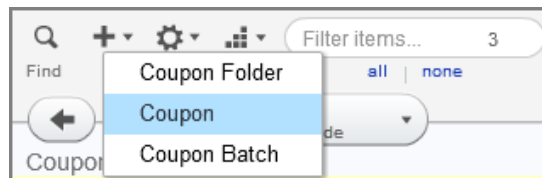
5. Enter a name for the coupon folder in the Name text box (required).

6. Specify the folder's location in the hierarchy by adding, replacing, or removing a parent using the Select Parent and Clear buttons on the top right of the Details pane. A parent is preselected if you see an asset name beside Select Parent.

- Add or replace a parent by clicking Select Parent and, once the Select an Item dialog box opens, clicking the radio button beside your preferred parent. Click OK.

- Remove a parent by clicking Clear beside Select Parent. A coupon folder without a parent resides at the top level of the coupon hierarchy.

7. Click Create.

The Details pane contains the General tab, which shows properties for the coupon folder.

Creating Freestanding Coupons

To create a new coupon:

1. In a Commerce Assets project, navigate to Merchandising.

2. Select Promotions and Coupons.

3. Select Coupons.

4. Click the Create button in the toolbar and select Coupon.

5. Fill out the fields in the Details pane.

6. Click Create.

The following table describes the coupon properties:

Property	Description
Coupon Code (required)	The coupon code is used by the customer when the coupon is redeemed. Merchandising automatically generates a coupon code (an example is shown above). You can change the code to something more meaningful to your customers; for example, a coupon for free shipping on holiday orders might be HOLFREESHIPPING. Note, however, that the code cannot be edited after creating the coupon. Coupon codes are case-sensitive.
Coupon Name (optional)	You can provide a display name for the coupon. If you do not provide a display name, the display name of the associated promotion is used.
Start and End Date	If the coupon is only good for a certain time period, enter the start and end dates that define that period.

Property	Description
Uses	Number of times the coupon can be used.
Parent Folder (optional)	If you want to move the coupon from its current location, you can select a different parent folder, or create a new folder.
Promotions (optional)	Select one or more existing promotions, or create a new promotion with which to associate this coupon. You do not have to associate any promotions with a coupon when you create the coupon; however, in order to distribute the coupon to customers, you must associate the coupon with one or more promotions.
Redeemable on Promotion Sites	If you are using the multisite feature, specify whether the coupon can be redeemed on all sites, or only on those sites with the coupon's associated promotion is connected (see Sites Tab (page 147)).
	If the coupon is redeemable on all sites, but the associated promotion is linked to a specific site, the customer must check out their order on that site in order for the promotion to apply during pricing.

Adding Coupons to a Promotion

You can add coupons to a promotion in two ways:

- On the General tab of the Coupon, you can select an existing promotion or create new promotions with which to associate the coupon.

- On the Availability & Coupons tab of the Promotion, you can select existing coupons or create new coupons with which to associate the promotion.

Click a display name to view or edit details of the promotion or coupon, depending on your starting point.

Creating Coupon Batches

Coupon batches allow you to create large numbers of coupons with usage limits and randomly generated coupon codes, in order to closely target and monitor coupon use.

To create a new coupon batch:

1. In a Commerce Assets project, navigate to Merchandising.

2. Select Promotions and Coupons.

3. Select Coupons.

4. Click the Create button in the toolbar and select Coupon Batch.

5. Fill out the fields in the Details pane.

6. Click Create.

The following table describes the coupon batch properties:

Property	Description
Coupon Code (prefix) (required)	For coupon batches, the coupon code is used as an identifying prefix. The coupon code is used when the customer claims a coupon, along with a randomly generated coupon number and validation code. Note that you cannot edit this value once the coupons have been generated.
Number of Coupons (required)	How many coupons to generate as part of the batch. Note that after the coupons have been generated, you cannot add more to an existing batch.
Coupon Name (required)	Name for the coupon.
Start & End Date (optional)	If the coupon is only good for a certain time period, enter the start and end of the availability period.
Coupon Usage Limit (optional)	Number of times each coupon in the batch can be used. The default setting is 1.
Parent Folder (optional)	If you want to move the coupon from its current location, you can select a different parent folder, or create a new folder.
Promotions (optional)	Select one or more existing promotions, or create a new promotion with which to associate this coupon. You do not have to associate any promotions with a coupon when you create the coupon; however, in order to distribute the coupon to customers, you must associate the coupon with one or more promotions.
Redeemable on	If you are using the multisite feature, specify whether the coupon can be redeemed on all sites, or only on those sites with the coupon's associated promotion is connected (see Sites Tab (page 147)).

Viewing and Exporting Coupon Batches

You can view information on coupons within a coupon batch by exporting the batch to either CSV or XLS format. To view and export a coupon batch:

1. In a Commerce Assets project, navigate to Merchandising.

2. Select Promotions and Coupons.

3. Select Coupons.

4. Select the batch coupon item. The coupon batch Redemption Rate is displayed on the General tab.

5. Click Preview and Export Coupons.

6. Select coupon properties to export. Click Preview to see properties with data.

7. Select Excel or CSV as the export format. Note that some versions of Excel limit the number of data rows per file.

8. Click Export. Follow your Web browser prompts to open or save the file.

Sorting Promotions

Merchandising provides a standard user interface for sorting your assets. The properties by which assets can be sorted vary by asset. You can sort promotions either by type or by folder:

You can then further sort them by name, ID, start date, or end date. If you sort the promotions by type (item, shipping, or order discount) you have the further option of sorting by priority.

Managing Promotions with Stacking Rules

Stacking rules prevent customers from taking advantage of unintended synergy among your promotions. (Coupon batches are another way of preventing customers from spreading promotions that you would prefer to target narrowly; see Creating Coupon Batches (page 159) for information.)

The stacking rules user interface consists of two parts:

• The stacking rule asset type allows you to define groups of promotions, which can then be combined with or excluded from use with other groups. You can also specify how many promotions within a group can be applied to any single order.

• The promotion asset type allows you to specify individual promotions as usable with or excluded from use with other promotions.

Promotions are always applied in the following order: item discounts, order discounts, shipping discounts. Therefore, regardless of whether you are using stacking rule combinations or promotion inclusions and exclusions the following apply:

• Item discounts can exclude both order and shipping discounts.

• Order discounts cannot exclude item discounts.

• Shipping discounts cannot exclude either item or order discounts.

The sections that follow describe how to use stacking rules and promotion inclusion and exclusion.

How Stacking Rules Work

Each stacking rule asset includes one or more promotions that you want to treat as a group. Rules are intended to prevent simple combination strategies, for example to keep customers from combining BOGO offers with gift with purchase offers. Make sure that the business logic behind each of your stacking rules is clear and well-understood before you implement them, and that each rule is truly necessary.

Each promotion can only be associated with a single stacking rule. Each stacking rule can include any number of promotions up to the number set in the "Maximum promotions per stacking rule" property. Within a stacking

rule, promotions are applied to orders according to the promotion's priority (see Creating Promotions (page 127) in this chapter for information on the Priority property).

Stacking rules have the following behavior:

* If an order qualifies for more than one promotion, and those promotions are linked to mutually exclusive stacking rules, the promotion with the highest priority is applied, and all other promotions are skipped.

* If you specify that Stacking Rule X is not combinable with Stacking Rule Y, then Y cannot be combined with X. If you change the combine list on one stacking rule, the affected stacking rule is automatically updated.

* Any promotion that is linked to a stacking rule that is excluded from use with the current stacking rule cannot be applied.

Using Included Promotions and Excluded Promotions

In addition to using stacking rules, merchandisers can specify include and exclude behavior on the Availability & Coupons tab of the Promotion asset type. These settings override the combinations allowed by the stacking rules, and therefore allow you to create exceptions to those rules when required.

Important: Include and exclude exceptions should be used rarely, to prevent confusion as to exactly when promotions apply.

The Promotions to exclude collection editor allows you to define individual promotions that cannot be combined with the current promotion (in addition to any stacking rule exclusions). For example, Promotion A may be included in Stacking Rule 1. Stacking Rule 1 combines with Stacking Rule 2, which includes Promotion B. You do not want Promotions A and B used together, so you add Promotion B to the Promotions to exclude list on Promotion A.

The Promotions to include collection editor allows you to make similar overrides in the other direction. For example, Promotion C may be included in Stacking Rule 3. Stacking Rule 3 does not combine with Stacking Rule 4, which includes Promotion D. You want Promotions C and D used together, so you add Promotion D to the Promotions to include list on Promotion C.

Note that if a promotion has already been applied to an order and that promotion excludes another promotion, the excluded promotion cannot be re-included by any promotions that apply later in the pricing process.

Creating Stacking Rules

To create a new stacking rule:

1. In a Commerce Assets project, navigate to Merchandising.

2. Select Promotions and Coupons.

3. Select Stacking Rules.

4. Click the Create button in the toolbar and select Catalog Folder.

5. Fill in the property fields in the Details pane. Only the Name field is required.

6. Click Create.

The following table describes the rule properties:

Property	Description
Name	Name for the stacking rule.
Maximum promotions per stacking rule	The maximum number of promotions that can be combined using this stacking rule.
Stacking rule combinations	Specify additional stacking rules that can be used with the current rule.

1. Specify the promotions to include on the Promotions tab.

2. Click the Create button at the bottom of the Details pane.

20 Creating and Managing Price Lists

Price lists allow you to target a specific set of prices to a specific group of customers.. Typically, prices are defined in a base price list and inherited by other price lists. That way, you can create a hierarchy of price lists and change prices only when you want to override inherited values. For example, suppose the price of the product Sleeveless Polo is defined as $19.99. All the Sleeveless Polo's SKUs inherit the price of $19.99 unless you explicitly override that price. For instance, you could lower the price of all SKUs for white Sleeveless Polo shirts during a week-long sale event.

You manage price lists in the Merchandising Price Lists view.

Price List Basics

The following are some key terms that you need to be familiar with when you work with price lists in Merchandising:

- **Base price list:** is the price list from which a current or new price list inherits price values.

- **SKU pricing:** is a simple pricing method that uses the product or SKU catalog page to assign a list price and, optionally, a sale price, to the SKU. SKU prices are independent of price lists, but you can use the two pricing methods together if the pricing model for your sites permits it. See *Creating and Managing SKUs* (page 79) for information about setting SKU pricing.

- **Volume pricing:** Sets the price of a product based on the number of items purchased. Price lists support two popular volume pricing models: bulk pricing and tiered pricing. Bulk pricing calculates the price of a product based on the minimum quantity ordered. Tiered pricing calculates the price of a product using fixed quantity or weight at different pricing levels. See Defining Volume Pricing (page 171) for more information.

Before You Begin

This chapter describes the price list creation and management tasks you can perform in the Merchandising Price Lists view. Merchandising assigns each user role a default level of access to price lists. For example, by default, users with the EPub-Admin role can create price list folders but users with the EPub-User role cannot. If Merchandising displays an error like the following when you try to perform a task in the Price Lists view, contact your administrator.
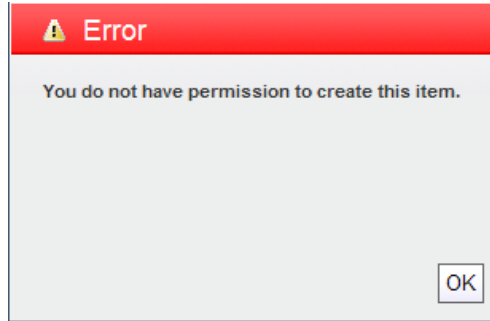
In addition to the tasks described in this chapter, you can also perform the following price list tasks while working with individual products and SKUs in Merchandising:

* Change prices for a product. See *Creating and Managing Products* (page 73) for more information.

* Change prices for al SKU. See *Creating and Managing SKUs* (page 79) for more information.

Viewing Existing Price Lists

Follow these steps to view existing price lists in Merchandising:

1. In a Commerce Assets project, navigate to Price Lists and show Price Lists or Price Lists and Folders.

2. (Optional) If you are working in Price Lists and Folders view, open a folder in the Navigation pane.

3. In the Navigation pane, select the price list to view.

4. Click the General tab to see basic information about the price list. See Price List Properties (page 169) for more about this tab.

5. Click the Price Lists tab to see the list of products, SKUs, and prices.

6. Select one of the following options from the Show menu and then click List:

   * Products displays the list of all products in the price list and their prices.

   * Products and Sub Skus displays the list of all products, associated SKUs, and their prices.

   * Skus displays the list of all SKUs in the price list and their prices.

   To filter the list, type or paste some text in the Product/Sku Starts With box and click List.

   Note: Depending on how your administrator configured Merchandising, you might not see all three options in the Show menu.
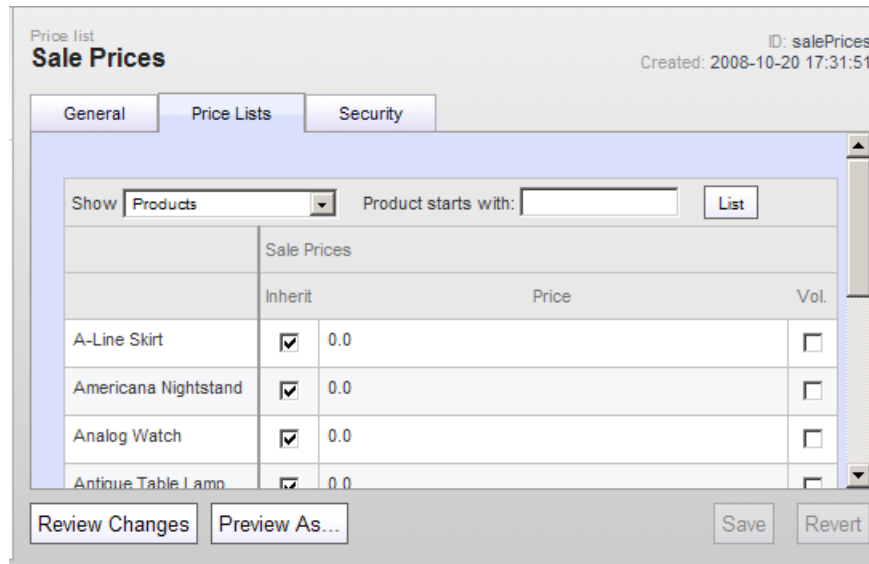
Creating Price Lists and Price List Folders

Create a hierarchy of price lists, starting with a base price list from which other price lists inherit. That way, you need to provide prices to other lists only when you want to override the defaults from the base list.

There are two views that you can use to create and delete price lists. Depending on how your administrator configured Merchandising, you might not see both views.

- Price Lists view organizes price lists in a tree that reflects the inheritance relationships among lists. Base price lists display on top and nested within them are their child lists.

- Price Lists and Folders view organizes price lists in the folders that you create. If you do not add price lists to folders, they appear alphabetically in the top-level of the hierarchy. If you use this view, it is a good idea to create the folder structure first, then create price lists within this structure.

  Price list folders help you organize price lists, but the folder hierarchy does not represent the parent-child hierarchy that controls price list inheritance. To see the base price list from which a price list inherits, look on the price list's General tab in the Details pane. See Viewing Existing Price Lists (page 166) for more information.

Creating Price List Folders

To create a price list folder:

1. In a Commerce Assets project, navigate to Price Lists and show Price Lists and Folders.

   Existing price lists and folders appear in the Navigation pane.

2. (Optional) To create a subfolder, select a parent folder in the Navigation pane.

3. Click Create in the toolbar and select Price List Folder.

4. Fill in the property fields in the Details pane. Name is the only required field.

5. Specify the price list folder's location in the folder tree by adding, replacing, or removing a parent folder. A parent is preselected if you see a folder name next to Select Parent.

   • Add or replace a folder parent by clicking Select Parent and selecting a parent folder in the dialog box that appears. Click OK to close the dialog box.

   • Remove a parent folder by clicking Clear.

6. Click Create.

   If you did not specify a parent folder, a message tells you that this item will not appear in the parent/child hierarchy. If you click OK, the item is created at the top level. If you click Cancel, you can return to step 5 and specify a parent folder.

   The new price list folder appears in the location you specified. If you did not specify a parent folder, Merchandising creates the new folder at the top level.

Creating Price Lists

To create a price list:

1. In a Commerce Assets project, navigate to Price Lists and show Price Lists or Price Lists and Folders.

2. (Optional) If you are working in Price Lists and Folders view, select a folder in the Navigation pane.

3. Click Create in the toolbar and select Price list.

4. Fill in the property fields in the Details pane. Name and Locale are the only required fields.

5. If you want the new price list to inherit prices from another list, click Edit next to the Base Price List property. When the Select an Item dialog box opens, navigate to the price list, select it, then click OK.

6. If you are working in Price Lists and Folder view, specify the price list's location in the folder tree by adding, replacing, or removing a parent folder. A parent is preselected if you see a folder name next to Select Parent.

   • Add or replace a folder parent by clicking Select Parent and selecting a parent folder in the dialog box that appears. Click OK to close the dialog box.

   • Remove a parent folder by clicking Clear.

7. Click Create.

   If you did not specify a base price list, a message tells you that this item will not appear in the parent/child hierarchy. Click OK to proceed without a base price list, or go back to step 5 and specify a base price list.

   The new price list displays in the Navigation pane, and information that describes it displays in the Details pane.

Oracle Commerce Platform automatically populates new price lists with all products in the site catalogs on your system. You can see these listed on the Price Lists tab when the create operation is finished. New price lists also automatically display in the Price List tab in the Details pane for all products and SKUs. See *Creating and Managing Products* (page 73) and *Creating and Managing SKUs* (page 79) for more information.

Price List Properties

You can work with the following Price List properties in the Details pane. The properties described in this section are the default Merchandising properties. Your administrator might have added new price list properties that are specific to your Web sites.

Property	Description
Name	The name of the price list. This name identifies the price list in Merchandising and the ACC. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Description	A description of the price list.
Locale	The locale that determines the currency and symbol to be used by prices in the price list. When prices are displayed in a browser that supports other locales, the price calculations are based on the locale specified here. This property is required.
Base price list	The price list from which the price list inherits.
Start Date	Date on which the price list is available, if a collection filter is implemented to use this property.
End date	Date the price list is no longer available, if a collection filter is implemented to use this property.

Linking and Unlinking Price Lists

Linking a price list associates it with a new base price list. Unlike catalog assets, you cannot link price lists to more than one parent. Each price list can have only one base price list from which it inherits.

Note: You can also associate a price list with a new parent by moving it. See .

To link a price list to a parent:

1. In a Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, select the price list to link.

3. In the dialog box that appears, select a base price list from which the selected list will inherit.

4. Click OK.

   In the Navigation pane, the linked price list appears as a child of its new base price list:
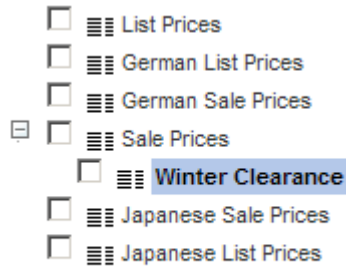
To unlink a price list from its current parent:

1. In a Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, select the price list to unlink from its parent.

3. Click Unlink and select Unlink from selected location.

   In the Navigation pane, the unlinked price list no longer appears as a child of its former parent:

Overriding Inherited Prices

 In a price list that inherits from a base price list, you can override the inherited price for a specified product or SKU.

The following procedure describes how to override inherited prices in the Price Lists view. To override inherited prices in the Price List tab for a product or SKU, see *Creating and Managing Products* (page 73) or *Creating and Managing SKUs* (page 79).

1. In a Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, select the price list whose prices you want to edit.

3. In the Details pane, click the Price Lists tab and show Products, Products and Sub Skus, or Skus.

4. In the row for the product or SKU whose price you want to change, uncheck Inherited.

5. Enter a new price in the price box that appears:

6. Repeat steps 4 and 5 for each inherited price you want to override.

7. Click Save at the bottom of the Details pane.

To change a price in a price list:

1. Open a Merchandising project.

2. Select Price Lists in the application dropdown menu at the top of the browse pane.

3. Select Price Lists in the Show menu.

4. Find and click the price list in the Browse pane.

5. Click the Price Lists tab in the editing pane.

Defining Volume Pricing

Price lists support two volume pricing models: bulk pricing and tiered pricing.

Bulk pricing calculates the price of a product based on the total quantity ordered. In the following example, hammers are priced at $20 each when you buy 1 to 10 hammers, $17 each when you buy 11 to 20 hammers, and $15 each when you buy 21 or more hammers.

Number of hammers purchased	Bulk Price per item	Order total
7 hammers	7 hammers at $20 each	$140
14 hammers	14 hammers at $17 each	$238
23 hammers	23 hammers at $15 each	$345

Tiered pricing applies different prices within the same order of identical items. Each price is assigned to a quantity range. In the following example, hammers are priced at $20 for the first 10 purchased, $17 each for the next 10 purchased, and $15 each for any additional hammers.

Number of hammers purchased	Tiered Price per item	Order total
7 hammers	7 hammers at $20 each	$140
15 hammers	10 hammers at $20 each 5 hammers at $17 each	$285
23 hammers	10 hammers at $20 each 10 hammers at $17 each 3 hammers at $15 each	$415

Specifying Bulk Pricing

The following procedure describes how to specify bulk pricing in the Price Lists view. To specify bulk pricing in the Price List tab for a product or SKU, see *Creating and Managing Products* (page 73) or *Creating and Managing SKUs* (page 79).

1. In a Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, select the price list whose prices you want to edit.

3. In the Details pane, click the Price Lists tab and show Products, Products and Sub Skus, or Skus.

4. Click the Vol checkbox in the row for the product or SKU whose price you want to change:

5. Click the Volume Price link in the asset's Price column. This displays the Volume Pricing dialog box:

6. Select Bulk: Apply to all items purchased.

7. Click Add Price.

8. Enter a Quantity and associated Price.

    Enter 1 as the first quantity.

    The quantity purchased must meet or exceed the number you enter for Quantity in order to receive the price you specify for that quantity.

9. Repeat steps 7 and 8 for each price range you want to add.

    In the following example, up to four items cost $9.99 each, up to nine items cost $8.99 each, and 10 or more items cost $7.99 each:

10. When you finish entering volume pricing values, click OK to save the prices and close the dialog box..

11. Click Save at the bottom of the Details pane.

Specifying Tiered Pricing

The following procedure describes how to specify tiered pricing in the Price Lists view. To specify tiered pricing in the Price List tab for a product or SKU, see *Creating and Managing Products* (page 73) or *Creating and Managing SKUs* (page 79).

1. In a Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, select the price list whose prices you want to edit.

3. In the Details pane, click the Price Lists tab and show Products, Products and Sub Skus, or Skus.

4. Click the Vol checkbox in the row for the product or SKU whose price you want to change.

5. Click the Volume Price link in the asset's Price column. This display the Volume Pricing dialog box:

6. Select Tiered: Apply only to items that meet or exceed the threshold.

7. Click Add Price.

8. Enter a Quantity and associated Price. As the first quantity, enter 1.

   The quantity purchased must meet or exceed the number you enter for Quantity in order to receive the price you specify for that quantity.

9. Repeat steps 7 and 8 for each price range you want to add.

   In the following example, the first four items cost $9.99 each, the fifth through ninth items cost $8.99 each, and the tenth and higher items cost $7.99 each:

10.When you finish entering the volume pricing values, click OK to save the prices and close the dialog box..

11.Click Save at the bottom of the Details pane.

Moving, Copying, and Deleting Price Lists

This section describes how to delete price lists from and move or copy price lists within the hierarchy

Moving Price Lists

You can move any price list to another location in the Price Lists tree. Moving a parent price list also moves its children. Moving or deleting a child price list does not affect its parents.

Note: You can also associate a price list with a new parent by linking it. See Linking and Unlinking Price Lists (page 169).

To move a price list:

1. In a Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, click the check box next to the price list that you want to move.

3. Click the Move button and choose an option:

   • Move from selected location

   • Move from all locations

4. In the Select Destination dialog, use the Search tab or the Browse tab to locate and select the price list where you want to nest the child price list. Click OK.

Moving Price List Folders to the Top Level

Follow these steps to move a price list folder that is currently nested in another folder:

1. In a Commerce Assets project, navigate to Price Lists and show Price Lists and Folders.

2. In the Navigation pane, click the checkbox next to the price list you want to move.

3. In the Details pane, the Parent Folder property is set to the price list folder's parent. Click Clear near the parent folder name.

4. Click Save.

   The price list folder displays in the first level of the hierarchy.

Copying Price Lists

You can copy any price list to another location in the Price Lists tree. Copying a parent price list does not move its children, but does clear the children's Base Price List property. Copying a child price list does not affect its parents.

To copy a price list:

1. In a Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, click the check box next to the price list that you want to copy.

3. Click the Duplicate icon.

4. In the Select Destination dialog, use the Search tab or the Browse tab to locate and select the price list where you want to nest the child price list. Click OK.

Deleting Price Lists

You can delete any price list in the Price Lists tree. Deleting a parent price list does not delete its children, but does clear the children's Base Price List property. Moving or deleting a child price list does not affect its parents.

To delete a price list:

1. In a Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, click the check box next to the price list that you want to delete.

3. Click Delete.

4. Click OK in the confirmation dialog to delete the price list or click Cancel to leave the price list unchanged.

Assigning Price Lists to Customers

Because prices can be based on contracts, requests for quotations, or pre-negotiated prices, it may be useful to assign a price list to an individual or to an organization.

There are two ways to use the Business Control Center to assign price lists to customers:

- Assign a price list directly to individual users. See Assigning Price Lists to Users (page 176).

- Assign a price list to an organization, so all users in an organization are provided with prices from that list. This option is available to customers who use Oracle Commerce Business Commerce with Merchandising. See Assigning Price Lists to Organizations (page 177).

It's also possible to provide a price list to users dynamically, by specifying a price list based on a set of circumstances. For example, you can create a scenario that, when a user registers, assigns a price list to him or her. Then, after the user makes a purchase or clicks a particular link, you can assign a different price list. To learn more about scenarios, see the *Personalization Programming Guide*.

Assigning Price Lists to Users

To assign price lists to individual users when your environment does not include Oracle Commerce Business Commerce, follow these steps:

1. On the Business Control Center home page, expand the Personalization entry in the Operations list. Click External Users.

2. In the Navigation pane, click the name of the user to whom you want to assign a price list.

3. In the editing pane, click the Commerce tab.

4. Under Commerce General, find the Price list property and click Select:

5. In the asset selector, browse or search for the Price List. When you find it, select the name and click OK.

6. If you use a Sale Price list, repeat steps 4 through 6 for the Sale Price List property.

7. Click Save.

To assign price lists to individual users when your environment includes Oracle Commerce Business Commerce, follow these steps:

1. On the Business Control Center home page, expand the Personalization entry in the Operations list. Click External Users.

2. In the browse pane, click the name of the user to whom you want to assign a price list.

3. In the editing pane, click the B2B Commerce tab.

   Under Commerce Contract, find the Price list property and click the arrow:
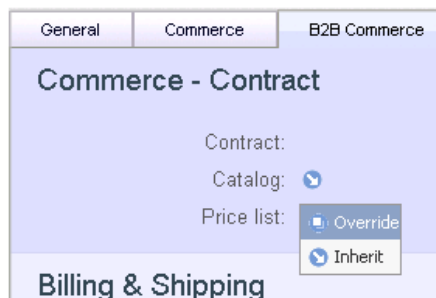
4. Do one of the following:

   - Choose Inherit to inherit the price list from the parent organization.

   - Choose Override to use the asset selector to find an existing price list. Select the price list and click OK.

5. Click Save.

Assigning Price Lists to Organizations

If your environment includes Oracle Commerce Business Commerce, you can define organizations and assign users to them. Properties you define for an organization are automatically inherited by all users in the organization. One property identifies a contract, which is an asset that associates a catalog, price list, and payment terms. To assign a price list to an organization, associate it with a contract and then associate the contract with an organization

To associate a price list with an organization, follow these steps:

1. On the Business Control Center home page, expand the Personalization entry in the Operations list. Click External Users.

2. From the Show dropdown menu, select Organizations.

3. In the browse pane, click the name of the organization to which you want to assign the contract and price list.

4. In the editing pane, select the General tab, and find the Contract property in the Basics property grouping:
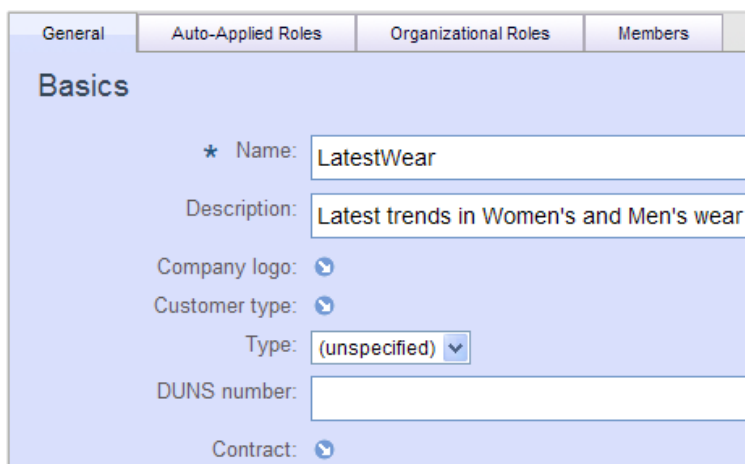
5. Click Contract and choose Override or Inherit:

Inherit: the organization inherits the contract from the parent organization. The interface reverts to the Contract arrow.

Override: displays another choice: Select or Create.

- Choose Select to use the asset selector to find an existing contract. Select the contract and click OK:

- Choose Create to create a new contract:

Click Save in the popup confirmation dialog.

Enter the name of the contract.

Click Select next to Pricelist. Use the asset selector to find an existing price list. Select the price list and click OK.

Click Create and Close.

The editing pane returns to the Organization's General tab, which shows the contract assignment:

Click Close.

See *Managing Price Lists* in the *Guide to Setting Up a Store* for additional information about assigning price lists to users.

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