Sitecore® Experience Commerce™ 9 Business Tools

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Sitecore® Experience Commerce™ 9 Business Tools User's Guide

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Introducing Sitecore® Experience Commerce™ 9 Business Tools

Sitecore XC is an enterprise-grade commerce solution that delivers a personalized experience throughout the customer lifecycle.

Sitecore XC Business Tools are integrated with other Sitecore Experience tools to provide you with ways to develop and deploy storefronts:

- Sitecore Experience Accelerator (SXA) Storefront template is a storefront solution for creating B2C e-commerce solutions. SXA Storefront contains commerce-specific components, including a webshop template built with Commerce functionality for SXA, the sample Habitat catalog, and sample themes. For more information, see the Introducing the SXA Storefront template topic.
- The Experience Editor on the Sitecore Experience dashboard enables you to create personalization rules so you can deliver targeted content to your customers. For example, you can create rules that give first-time customers a 15% off coupon, give return customers free shipping on their order, or give specific discounts to different social media channels. For more information, see the Walkthrough: Personalizing components topic, or download the 10 personalization tactics white paper.

Sitecore XC Business Tools have six key features:

- Catalog and sellable item management.
- Inventory management.
- Customer management.
- Orders management.
- Promotions management.
- Pricing management.

Catalog and sellable item management

Sellable items can be physical sellable items, such as headphones, or digital goods, which are non-physical sellable items, such as a warranty plan. Sellable items can be added to multiple catalogs, categories, and inventory sets, and have multiple promotions applied. Examples of what you can do include:

- Define a product with variations; for example, the same shirt can have different colors.
- Add tags to sellable items as a flexible way to segregate groups of sellable items in addition to them being contained in catalogs and categories.
- Create catalogs that display on your website in different languages and currencies.
- Establish category hierarchies and relationships between categories and sellable items that are in the same catalog or in different catalogs.

Inventory management

Create and manage multiple inventory sets. Examples of what you can do include:

- Attach inventory sets to multiple storefronts.
- Allocate different quantities of the same sellable item to different inventory sets. For example, allocate 100 of a sellable item to inventory set A, and 40 of the same sellable item to inventory set B.
- Transfer quantities of sellable items between different inventory sets.

Customer management

Update and manage customer accounts and information. Examples of what you can do include:

- Search for individual customers.
- Check addresses, customer orders, and entitlements.

Order management

Capture and manage orders, including payment and fulfillment options, RMAs (Return Merchandise Authorizations) and refunds, and preorders and backorders. Examples of what you can do include:

- View order details, grand totals, and payment totals.
- Allow RMAs.
- List the entitlement sellable items, such as subscription products, that are associated with an order, including details and any disabled or canceled entitlements.
- Add new items, edit item amounts, or delete items for pending orders.
- Search the catalog associated with the order and add sellable items or sellable item variants.
- Cancel, hold, release or undo holds, and set fulfillment on groups of orders.

Promotion management

Define, evaluate, and apply promotions to sellable items, at defined levels of granularity. Examples of what you can do include:

- Promote a sellable item or collection of sellable items through tags.
- Qualify promotions based on rule-based expressions, such as channel, date/time, catalog, shop, or customer order history, and apply multiple qualifications to a promotion.
- Award a benefit to a sellable item using a sellable item level adjustment, a cart level adjustment, or an entitlement or action on an entitlement such as extending a warranty or subscription.
- Qualify promotions using coupons that are applied as public coupons that are named, multi-use coupons for every customer to use, or private coupons that are single-use or single customer coupons.
- Process and present promotions in a shopping cart as the customer is using it.
- Calculate bulk promotions in for a shopping cart as the customer is

using it.
- Retrieve related promotions for a sellable item.

Pricing management

Create and manage pricing scenarios. Examples of what you can do include:

- Define price books and price cards to define levels of granularity of pricing for a specific sellable item, or for a range of sellable items.
- Define list or sell prices for multiple currencies.
- Define pricing rules by date or quantity.

Merchandising

Sitecore XC supports the creation and management of catalogs, categories, and sellable items.

The following diagram is a high-level view of the organization of merchandising items:

You can have any number of catalogs and categories that group products (which represent sellable items) into assortments for different purposes. For example, you may have one catalog that contains all of your sellable items, and another that contains only a subset of those sellable items, such as a holiday sale with different pricing rules for those sellable items.

Categories and subcategories are a way of grouping sellable items within a catalog, and can be used to organize the navigation of your site. For example, when customers navigate to a parent level category on your site, any subcategories will appear, and customers can quickly navigate to the sellable items they want to view.

A sellable item can be a physical sellable item, such as headphones, or or digital goods, which are non-physical sellable items, such as a warranty plan. Sellable items can be associated with multiple catalogs and categories, and each sellable item can be displayed and behave differently according to your merchandising needs. Sellable items can have variants with different properties. For example, a BigSoundz 80GB MP3 player may have different variants related to the color of the item, and the different colors can have different list prices.

Sellable items can be related to each other through relationships such as cross-sells and up-sells, and relationship data can be shown on category or sellable item pages to support any related sellable items and categories. You can use images to help describe a sellable item, which you add by using the Sitecore Media Library.

Work with catalogs and categories

A catalog is a container for one or more categories, and is typically the first item you create in the business tools. A catalog contains sellable items which can optionally be organized into categories and subcategories.

This topic describes how to:

- Add a new catalog.
- Add a category or subcategory to a catalog.
- Associate an existing category with a different category.
- Disassociate a subcategory from a parent category.

Add a new catalog

1. To open the Merchandising dashboard and access the catalogs and categories tools, in the left navigation pane, click Merchandising.
2. In the Catalogs section of the Merchandising dashboard, click +.
3. In the Add Catalog window, enter a name, display name, and an optional description.

Note: The list of catalogs shown on the Merchandising dashboard is in alphabetical order.

Add a category or subcategory to a catalog

Categories and subcategories in your catalog gives you more granular control of sellable items. For example, if you have a catalog for personal electronics, you may want to have a category of *Appliances,* and subcategories of *Microwaves* and *Refrigerators* contained in the parent *Appliances* category.

To add a category or subcategory to a catalog:

1. In the Catalogs section of the merchandising dashboard, click the name of a catalog.

2. In the Categories section of the catalog details page, click +.
3. In the Add window, enter a name, display name, and an optional description for the category.
4. To add a subcategory, in the Categories section of the category details page, click +.
5. In the Add window, enter a name, display name, and an optional description for the category.

Associate an existing category with a different category.

Subcategories can be associated with multiple categories. For example, you may want to associate the subcategory of *Microwaves* with a *Featured* category, in addition to the subcategory already being associated with the *Appliances* category. To associate a subcategory with a parent category:

1. In the Categories section of a category details page, click Associate.
2. In the Associate window, enter the name of the category you want to associate with the category. Select a category from the drop-down list.

Disassociate a subcategory from a parent category

If you disassociate a subcategory from a parent category, that subcategory and any subcategories or sellable items contained in it are removed from the catalog, unless the subcategory is already associated with other categories or the top level of the catalog. For example, if you have a subcategory of *Refrigerators* contained in the *Appliances* category, and a subcategory of *Mini* that is contained in the *Refrigerators* subcategory, and you decide to disassociate the *Mini* subcategory, that subcategory and all sellable items contained in it will be removed from the catalog. However, you can associate a subcategory and the sellable items it contains to a different parent category, or the top level catalog.

To disassociate a subcategory from a category:

1. In the Categories section of a catalog details page, select the name of a subcategory and click Disassociate.
2. In the Disassociate window, select the Re-parent check box and enter the ID of the new category that you want to reassociate the subcategory and its sellable items to, or if you want to remove the subcategory and the sellable items it contains and not reassociate them with any category, click the check mark.

Work with sellable items

Sellable items represent products in Sitecore XC.

This topic describes how to:

- Create a sellable item in a catalog, category, or subcategory.
- Add information to a sellable item.
- Add pricing information to a sellable item.
- Update your SXA storefront to show a sellable item.

Create a sellable item

You can create a sellable item in a catalog, category, or subcategory. It's not possible to create a sellable item unless it's associated with one of these things. If you disassociate a sellable item from one of these things, and it isn't associated with any other, it still exists and can be found by using Search on the Merchandising dashboard.

1. To add a sellable item at the root of a catalog, in the Sellable Items section of a catalog details page, click +. To add a sellable item in a category or subcategory, in the Categories section of a category or subcategory details page, click the name of the category where you want to add the sellable item.
2. In the Add Sellable Item window, enter a product ID, name, and display name.

Note: The list of sellable items shown on a catalog or category details page is in the order the sellable items were created.

Add information to a sellable item

1. In the Sellable Items section of a catalog, category, or subcategory details page, click the name of a sellable item.

2. To add a list price, variant, or image, click + in the corresponding section.
3. To edit the information of the identifiers, display properties, or item specifications, click **Edit** in the corresponding section.

Add pricing information to a sellable item

The XC Business Tools enable you to associate several different types of pricing with a sellable item, including a list price, multicurrency pricing, and tiered pricing. For more information, see the [Pricing](#) topic.

To add a list price:

1. In the Sellable Items section of a catalog, category, or subcategory details page, click the name of a sellable item.
2. In the List Price section of the details page, click + and add list prices for each currency your store supports. The storefront will display the corresponding list price based on the currency that is configured in the storefront control panel settings, located at */sitecore/Commerce/Commerce Control Panel/Storefront Settings/Storefronts/[storefront name]/Currencies Display Adjustments*.

To associate a price card:

1. In the Sellable Items section of catalog, category, or subcategory details page, click the name of a sellable item.
2. In the Pricing section of the sellable items detail page, click Edit.
3. In the Edit Pricing window, click the drop-down arrow and select a price card.
   Note: The price card must be created before being associated with a product. For more information, see [Work with price cards](#)

Update your SXA storefront to show a new sellable item

Once you have created a sellable item, you must use the **Content Editor** and **Control Panel** tools on the Sitecore dashboard to update the cache and index information for your SXA site.

1. On the Sitecore Launchpad, click **Content Editor**.
2. Switch to the **Commerce** tab on the ribbon.
3. Click **Refresh Commerce Cache**.
4. (Optional) Navigate to */sitecore/Commerce/Catalog Management/Catalogs,* locate the sellable item you created, and check that is located in the correct location for the catalog and/or categories where you created it. For example, */sitecore/Commerce/Catalog Management/Catalogs/Habitat_Master/Departments/Home Theatre/Popcorn,* where the catalog is *Habitat_Master,* the category is *Departments,* the subcategory is *Home Theatre,* and the sellable item you created is *Popcorn.*
5. Return to the Sitecore Launchpad, and click **Control Panel**.
6. In the **Indexing** section, click **Indexing Manager**.
7. In the **Rebuild search index** section, select the check box for **sitecore_web_index**, and click **Rebuild**. Note: The size of your catalog will determine the length of time to rebuild the search index.
8. After the search index has finished rebuilding, click **Close**.
9. Open your SXA storefront, and search or navigate to the sellable item you created to confirm that the item is on the storefront.

Inventory

Sitecore XC supports the creation and management of inventory sets. Inventory sets provide separate containers to organize sellable items outside of catalogs or categories, and can be used to control availability for different channels.

With inventory sets, you can do the following:

- Allocate sellable items between multiple inventory sets. For example, when a sellable item is associated with two inventory sets, you can allocate 100 of the sellable item to inventory set A, and 40 to inventory set B. This lets you manage stock according to your needs.
- Transfer amounts of sellable items between multiple inventory sets. For example, if you allocated 100 of a sellable item to inventory set A and 40 to set B, but set B is running low, you can transfer additional amounts of the sellable item from inventory set A to inventory set B. This lets you respond to the different needs of your stores and distribution centers.
- Set the dates that a sellable item is available for preorders or backorders, and the amount a customer can order. For example, if a Blu-Ray release date is six months away, customers can purchase it in advance of the release date to assure that they will receive it as soon as it's available.

Work with inventory

Inventory sets are containers that let you manage the inventory amounts, preorder and backorder dates and limits, and quantities of sellable items across multiple categories and storefronts.

This topic describes how to:

- Create an inventory set.
- Associate a sellable item with an inventory set.
- Edit inventory information for a sellable item.
- Transfer inventory between inventory sets.
- Associate a catalog with an inventory set.

Create an inventory set

1. In the Inventory Sets section of the Inventory dashboard, click +.
2. In the Add window, and enter a Name, Display Name. The description is optional.

Note: The list of inventory sets shown on the Inventory dashboard is in alphabetical order.

Associate a sellable item with an inventory set

You can associate a sellable item with multiple inventory sets.

To associate a sellable item with an inventory set:

1. In the Sellable Items section of an inventory set details page, select Associate Sellable Item to Inventory Set from the drop-down menu.
2. In the Associate Sellable Item to Inventory Set window, in the Sellable Item field, enter part of the sellable item name to get a list of all the sellable items that match. Select the sellable item from the list.
3. Select the Invoice Unity Price Currency from the drop-down list. The

information for Quantity, Invoice Unit Price, Invoice Price Currency, when the sellable item will be available for preorders or backorders, and the limits for preorders and backorders all are optional.

Note: When a sellable item has been associated with an inventory set, clicking the name of the sellable item will take you to the details page for that sellable item in Merchandising, where you can edit the inventory information and add additional list prices for that sellable item. For more information about sellable items, see the [Work with sellable items](#) topic.

Edit inventory information for a sellable item

1. In the Sellable Items section of an inventory set details page, select the name of a sellable item.
2. Select Edit Inventory Information from the drop-down menu.

You can edit for the following inventory information:

- Quantity: The amount of the sellable item that is currently in stock for that inventory set.
- Invoice Unit Price: The wholesale price for the sellable item associated with an invoice.
- Invoice Unit Price Currency: The currency for the sellable item associated with an invoice.
- Preorderable: If this option is chosen, the sellable item is available to be preordered in that inventory set.
- Preorder availability date: The date a sellable item is available to preordered from that inventory set.
- Preorder limit: The amount of sellable items a customer can preorder from that inventory set.
- Backorderable If this option is chosen, the sellable item can be backordered if it is out of stock in that inventory set.
- Backorder availability date: When a backordered sellable item will become available in that inventory set.
- Backorder limit: The amount of a sellable item a customer can purcahse if it is out of stock in that inventory set.

Transfer inventory between inventory sets

To transfer inventory between inventory sets:

1. In the Sellable Items section of an inventory set details page, select a sellable item name.
2. In the drop-down list, click Transfer Inventory.
3. In the Transfer Inventory window, select the target inventory set from the drop-down list.
4. Enter the quantity of the sellable item that you want to transfer to that inventory set.

Associate a catalog with an inventory set

Associating a catalog with an inventory set is optional.

1. In the Catalogs section of an inventory set details page, click Associate.
2. In the Associate Catalog window, select the name of the catalog to associate from the drop-down list.

Pricing

Sitecore XC supports the creation and management of pricing scenarios through price books, which contain price cards. Price cards contain pricing information for sellable items and price snapshots that define the schedules for pricing changes.

A list price is the base price of a sellable item. A list price can represent the MSRP (Manufacturer's Suggested Retail Price) of a sellable item, or a price set by the retailer. List prices for sellable items are defined using the Merchandising dashboard. A sellable item can have different list prices for different currencies. For example, BigSoundz Manufacturing may recommend a list price that's equivalent to $99.99 across every currency for the 80GB MP3 player that they manufacture. However, the list prices that you set for different currencies do not have to be equivalent. You can set the list price at $129.00 for USD, and $119.00 for CAD.

The following diagram is a high-level view of the organization relation of price books, and price cards, and sellable items:

Price cards are used to apply pricing information, such as multicurrency prices or tiered price levels, to individual or multiple sellable items. For example, if you want to have a common price across all of the sellable items that are 80GB MP3 players and offer tiered pricing for them, and you would associate each individual sellable item of that type with a specific price card.

A sell price represents the price the retailer wants to sell a sellable item at, and is often less than the list price. A sell price is the final calculated price

based on data in the pricing system. This is the price a customer would see on the details page of a sellable item. The sell price may be regulated by policies and environmental aspects that are related to the location of the retailer.

Is/Was pricing is derived from the sell price and the list price. For example, in order to show a discount, the current sell price would be displayed to the customer, with the original list price displayed with a strike through.

The elements of pricing are:

- Price books. A price book is a container for a set of pricing information. You can use a price book to hold all the pricing information for a specific storefront or country, or hold all of the pricing information for a specific group of sellable items, so you can change the group pricing at once.
- Price cards. A price card is a container for specific, multicurrency pricing for a sellable item or group of sellable items. You can define tiered pricing levels for different quantities of sellable items, for example, $5 for a single sellable item, but reducing the price to $4 if the customer buys five or more of the same sellable item.
- Snapshots. A snapshot is a time range that defines when pricing changes occur. For example, you could create a snapshot to change the price of a sellable item at the beginning of the next month, and the price change would appear automatically on the storefront at that time. Because snapshots are contained in a price card, the snapshot can apply price changes to multiple sellable items.
- Tags. A tag is a way to group sellable items together. For example, you could tag all new releases of comedy DVDs with a "New" tag, and create a price card for the "New" tag that contains a price of $9.99. When you want to change the price for those DVDs, you would remove the tag from the sellable items, and the price would revert to the previously defined list price.

Work with price books

A price book is a container for one or more price cards.

This topic describes how to:

- Create a price book.
- Associate a catalog with a price book.

The lists of price books and catatlogs are shown in alphabetical order.

These tasks can be performed by either the Pricer or Pricer Manager role.

Create a price book

1. In the Price Books section of the Pricing dashboard, click +.
2. In the Add window, enter a name. The display name, description, and currency ID set are optional.

Associate a catalog with a price book

A price book can be associated with multiple catalogs, but a catalog can only be associated with one price book. If a catalog is already associated with a price book, you can associate that catalog with a different price book, but the catalog will be automatically disassociated from the first price book.

To associate a catalog with a price book.

1. In the Catalogs section of the price book details page, click Associate.
2. In the Associate Catalog window, select the catalog name from the drop-down list.
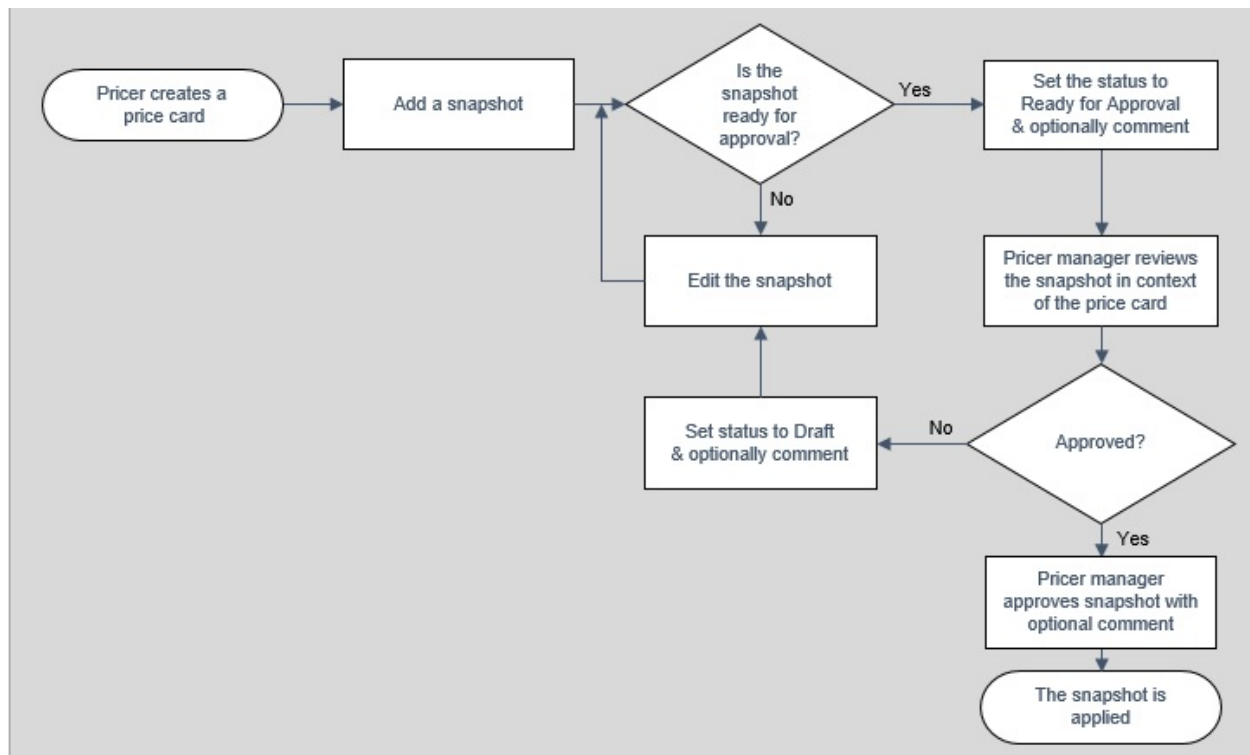
Work with price cards

A price card provides a way to apply common pricing for a group of sellable items without repeating the same pricing definition in each.

This topic describes how to:

- Create a price card.
- Create a snapshot.
- Add tags to the snapshot - optional.
- Request approval, approve, or reject a snapshot.

These tasks can be performed by either a Pricer or Pricer Manager, except for approving or rejecting a snapshot, which can only be performed by a Pricer Manager.

The following diagram shows the workflow for creating a price card and snapshot:

Price cards are associated to a sellable item on a sellable items details page. For more information, see the [Work with sellable items](#) topic.

Create a price card

The price card details page information about the price card, including the existing snapshots. You can edit the details, duplicate the price card, and add and remove snapshots. Price cards can only be created in an existing price book.

To create a price card:

1. In the Price Cards section of a price book details page, click +.
2. In the Add window, enter a name. The description and display name are optional.

Create a snapshot

A snapshot contains a price that is defined to apply to a price card at a specified date and time. The price changes in the snapshot are linked to the currencies for the sellable item, or the quantities that a customer purchases.

To create a snapshot:

1. In the Price Card Snapshots section of a price card details page, click +.
2. In the Add window, select a date and time for the snapshot to begin.
3. In the Price Card Snapshots section of the price card details page, click the snapshot that you created.
4. In the Pricing section of the price snapshot details page, click +.
5. In the Add window, click the drop-down arrow and select the currency for the snapshot.
6. Click the check mark. The fields for Quantity and Price appear.
7. Enter a quantity and price for the snapshot.
8. To add additional price breaks, click +, and enter the information for quantity and price.

Add tags to the snapshot - optional

You can use tags to apply a snapshot to all sellable items with the same tag. For example, if you add the tag *stereo* to a snapshot, the snapshot will be applied to every sellable item tagged with *stereo*.

1. In the Price Snapshot Details section of a price snapshot details page, click the drop-down arrow and select Edit.
2. In the Edit window, in the Included Tags field, type a tag and click Enter.

Request approval, approve, or reject a snapshot

A snapshot can't be edited once it has been submitted for approval, but if it is rejected, it returns to a draft state.

- In the Details section of a price snapshot details page, click the drop-down arrow and select Request Approval, Approve, or Reject. Comments are optional.

Promotions

A promotion defines a set of qualifications for applying benefits to sellable items and orders. You can qualify promotions using rules, such as date/time, catalog, shop, or the customer order history, and you can apply multiple qualifications to a promotion.

The elements of promotions are:

- Promotion books. A collection of promotions, which can apply to sellable items that are contained in multiple catalogs.
- Promotions. One or more benefits that can be applied to sellable items and orders.
- Qualifications. A rule that can be applied to a promotion. Multiple qualifications can be applied to a single promotion.
- Benefits. The discounts that are applied to an order as the result of a promotion, such as free shipping or 50% off the order total. Multiple benefits can be added to a promotion.
- Public coupons. A code that can be used by any customer, and can be used multiple times on separate orders. Public coupons are frequently used for promotions that are publicized through social media marketing, or being displayed on the sellable item, category, or shop landing pages.
- Private coupons. A code that is assigned to only a single customer.

Work with promotions

A promotion defines a set of qualifications that are used to apply benefits to a customer's order.

This topic describes how to:

- Create a promotion book.
- Associate a catalog to a promotion book.
- Create a promotion.
- Add a sellable item to a promotion.
- Set the parameters of a promotion.
- Add a benefit to a promotion.
- Add a qualification to a promotion.
- Create a public coupon - optional.
- Create and allocate a private coupon - optional.
- Request approval, approve, or reject a promotion.

These tasks can be performed by either a Promotioner or Promotioner Manager, except for approving or rejecting a snapshot, which can only be performed by a Promotioner Manager.

Create a promotion book

A promotion book contains multiple promotions, which can apply to sellable items, catalogs, or customer shopping carts. The Promotions Books page shows all of the existing promotion books.

To add a new promotion book:

1. To open the Promotions dashboard, in the left navigation pane, click Promotions.
2. In the Promotions Book section, click +.
3. Enter a name for the new promotion book. The display name and description are optional.

Note: The list of promotion books on the Promotions dashboard is shown in alphabetical order.

Associate a catalog with a promotion book

A promotion book can be associated with multiple catalogs, but a catalog can only be associated with one promotion book. If a catalog is already associated with a promotion book, you can associate that catalog with a different promotion book, but the catalog will be automatically disassociated from the first promotion book. You must associate a promotion book with a catalog before you can associate any sellable items with the promotion book.

To associate a catalog with a promotion book:

1. In the Catalogs section of a promotion book details page, click Associate.
2. From the Catalog Name drop-down list, select the catalog you want to associate.

Create a promotion

You must create a promotion book before you can create a promotion.

To create a promotion book:

1. In the Promotions Books section of the Promotions dashboard, click the name of a promotion book.
2. In the Promotions section of the promotion book details page, click +.
3. Enter a name, the dates and times that the promotion is valid for, the display text, and the display cart text. The display name, description, and if the promotion is exclusive are optional.
   Note: If the Exclusive check box is selected, only this promotion will be applied on the shopping cart. If multiple promotions can be applied to the order, the exclusive promotion with the earliest Valid From date will be applied.

Add a sellable item to a promotion

You can add individual sellable items to a promotion, instead of having a promotion be applied to a full catalog.

To add a sellable item to a promotion:

1. In the Items section of a promotion book details page, click +.
2. In the Item Id field, enter a term in the display name of a sellable item, such as *Remote*. The drop-down list will show all of the sellable items that use the term. Select the item that you want to apply the promotion to.

Set the parameters of a promotion

The parameters of a promotion include any qualifications that must be met for a promotion to be applied to a customer's order, the benefits of the promotion, and if a promotion is a public coupon that is available to all customers, or if it is a private coupon that is only available to a select group of customers. For more information about the qualifications and benefits that can be applied to a promotion, see the [Promotions qualifications](#) and [Promotions benefits](#) topics.

Add a qualification to a promotion

Qualifications are conditions that must be met for the promotion to be applied to the customer order. Multiple qualifications can be added to a promotion, so the first condition you select may trigger additional conditions you can select.

To add a qualification to a promotion:

1. In the Promotions section of the promotion book details page, click the name of a promotion.
2. In the Qualifications section of the promotion details page, click +.
3. In the Add window, select a condition from the drop-down list.

4. Click the check mark to save your information. New fields will appear. Note: Once you have saved your selected condition, you can't change it.
5. In the Add window, from the Condition Operator drop-down menu, select *And* or *Or*.
Note: The *And* condition operator means that all conditions must be met for the promotion to be applied to the order, while the *Or* condition operator means that any single condition can be met for the promotion to be applied.
6. Any conditions that apply to a sellable item cause the Item Id field to appear. You must enter the sellable item information e in the format of *Catalog Name|item ID|Variant ID* . If there is no variant of the sellable item, the information must be in the format of *Catalog Name|item ID* .

Add a benefit to a promotion

Benefits are the discounts that are applied to a customer's order as the result of a promotion. For example, free shipping, or 50% off the order total. Multiple benefits can be added to a promotion.

To add a benefit to a promotion:

1. In the Promotions section of the promotion book details page, click the name of a promotion.
2. In the Benefits section of the promotion details page, click +.
3. In the Add window, select a benefit from the drop-down list.

Create a public coupon - optional

A public coupon is a discount code that can be used by any customer, and can be used multiple times on separate orders. Public coupons are frequently created for promotions that are publicized through social media, or displayed on the storefront, category, or sellable item pages.

To create a public coupon:

1. In the Public Coupons section of the promotion details page, click +.

2. In the Add window, enter a coupon code.

Create and allocate a private coupon - optional

A private coupon is a discount code that is assigned to a single customer. You can specify how many private coupons you want to create, and how many of those codes are allocated to a specific promotional campaign. Once a private coupon is created and allocated, you can download an Excel document that contains the codes for each allocation.

To create and allocate a private coupon:

1. In the Private Coupons section of the promotion details page, click +.
2. In the Add window, enter a prefix, suffix, and the total number of the private coupon that will be available.
3. Click the check mark to save your information.
4. Return to the promotion details page, and in the Private Coupons, click the name of a private coupon.
5. In the Allocate window, enter an amount.
6. Click the globe icon to generate the private coupon codes and save them as an Excel file.

Request approval, approve, or reject a promotion

A promotion can't be edited once it has been submitted for approval, but if it is rejected, it returns to a draft state. However, you can test a promotion in your authoring environment before you send it through the approval process. For information about the approval process, see the [Promotion approval process](#) topic.

- In the Details section of a promotion details page, click the drop-down arrow and select Request Approval, Approve, or Reject. Comments are optional.

Promotion approval process

The following diagram illustrates the promotion approval process:
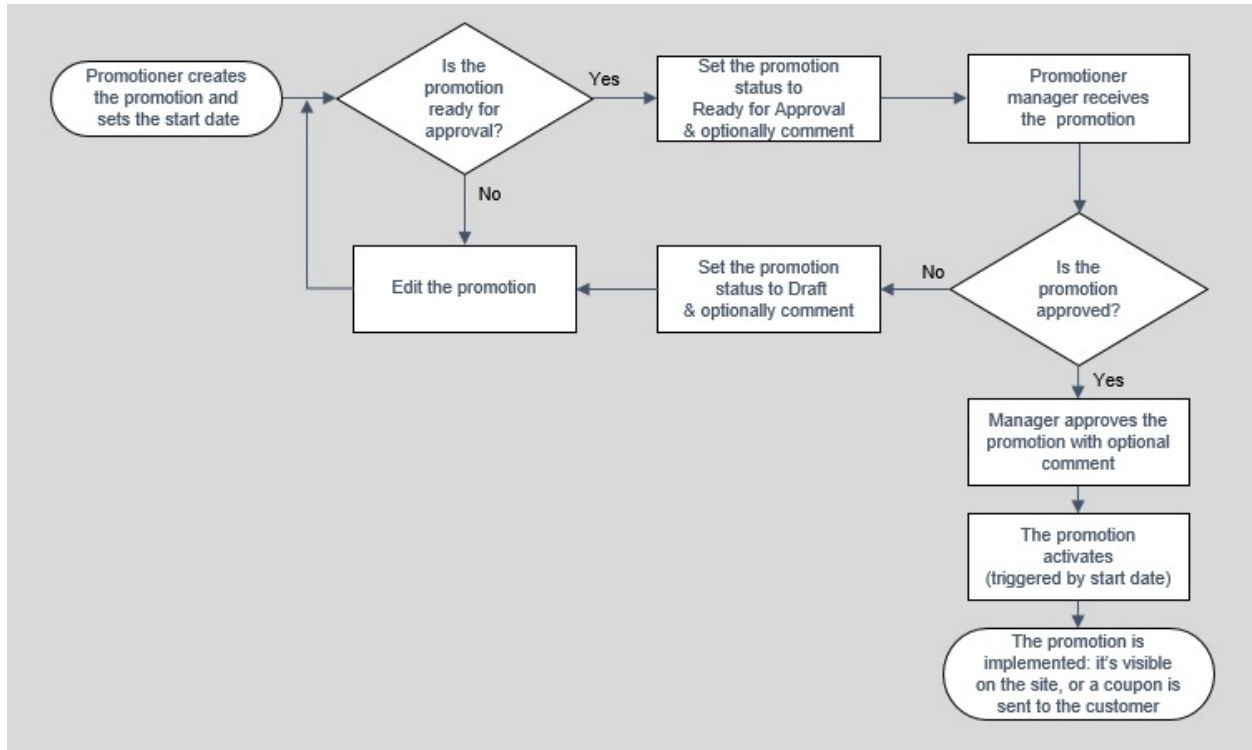
Promotions qualifications

Sitecore XC has multiple qualifications that you can use when creating promotions.

Qualifications are the conditions you set on a promotion that need to be met for the promotion benefits to be applied to a shopper's order. Multiple qualifications can be applied to a promotion. If you set multiple qualifications on a single promotion, you can control whether all of them or only some of them have to be met for the promotion to be applied to a shopping cart. For example, if qualifications A, B, and C are set on a promotion, then A and B could be met, and the promotion benefits would still be applied to the shopping cart. If neither A or B are met, but C is met, then the promotion benefits could still be applied to the shopping cart.

There are qualifications that relate to product inventory, shopping carts, the sellable items in a shopping cart, specific groups of shoppers, the history of a specific shopper, the dates that the promotion runs, or for a specific shop.

You can apply the following qualifications to the product inventory:

- **Is Item in Stock?** Is the sellable item in stock?
- **Is Item in Stock in [specific] Location?** Is the sellable item in stock in a defined location?
- **Inventory Item Stock Count in [specific] Location [compares] to [specific value]?** Does the inventory of a sellable item that is available in a defined location meet a defined threshold?
- **Is Item Out of Stock?** Is the sellable item out of stock?
- **Is Item Out of Stock in [specific] Location?** Is the sellable item in a defined location out of stock?
- **Is Item Pre-orderable?** Can a new sellable item be ordered in advance of its release date?
- **Is Item Pre-orderable in [specific] Location?** Can a new sellable item available in a specific location be ordered in advance of its release date?
- **Is Item Back-orderable?** Can an out-of-stock sellable item be ordered?

- **Is Item Back-orderable in [specific] Location?** Can an item that's out-of-stock in a specific location be ordered?

You can apply the following qualifications to a customer's shopping cart:

- **Cart Has Items?** Does the customer's shopping cart contain any sellable items?
- **Is Cart Item Available?** Is the sellable item in the shopping cart available for purchase?
- **Is Cart Item [specific] Quantity Available?** Is the quantity of a sellable item in the customer's shopping cart available for purchase?
- **Cart Any Item Subtotal [compares] to [specific value]?** Does the subtotal for any sellable item placed in a customer's shopping cart meet or exceed a defined total?
- **Cart Subtotal [compares] to [specific value]?** Does the subtotal for everything in a customer's shopping cart meet or exceed a defined total?
- **Cart Has Fulfillment?** Has the customer chosen a fulfillment option for their order?

Note: Sitecore XC does not support promotions that use cart subtotal qualifications to apply line item benefits.
You can apply the following qualifications to specific line items in a shopping cart:

- **Cart Item has [specific] tag?** Does the sellable item in the cart have a defined tag?
- **Cart Item Quantity [compares] to [specific value]?** Does the quantity of the sellable item in a customer's shopping cart meet or exceed a defined amount?
- **Cart Item Quantity is in [min] [max] Range?** Is the quantity of a sellable item in the customer's shopping cart between defined minimum amount and maximum amounts?
- **Cart Item Subtotal [compares] to [specific value]?** Does the subtotal for everything in a customer's shopping cart meet or exceed a defined total?

You can apply the following qualifications to any customer:

- **Is Cart Contact Registered?** Does the customer have an account with your store?
- **Is Cart Contact Currency [specific value]?** Does the currency associated with the customer account match the defined currency?
- **Is Cart Contact Customer ID [specific value]?** Does the customer account have a specific, predefined ID?
- **Is Cart Contact Language [specific value]?** Does the language associated with the customer account match the defined language?

You can apply the following qualifications to the transaction history of the current customer:

- **Current Customer Has Purchased [specific] Item?** Has the customer purchased the specific sellable item before?
- **Current Customer Has Purchased Item with [specific] Tag?** Has the customer purchased a sellable item with the defined tag before?
- **Current Customer Orders Count [compares] to [specific value]?** Does the number of the customer's previous orders meet or exceed a defined amount?
- **Current Customer Orders Total [compares] to [specific value]?** Does the purchase total of the customer's previous orders meet or exceed a defined amount?

You can apply the following qualifications to the current date:

- **Current Date Has Passed?** Is the date after the defined date?
- **Is Current Day?** Does the day match the defined date?
- **Is Current Month?** Does the month match the defined month?

You can apply the following qualifications to a specific shop:

- **Is Shop Currency [specific value]?** Does the currency for the shop match the defined currency?
- **Is Shop Language [specific value]?** Does the language for the shop match the defined language?

- **Is Shop Name [specific value]?** Does the name of the shop match the defined name?

Promotions benefits

Benefits are the possible discounts you select to apply to a promotion. The benefits are applied to a customer's order when the qualification conditions for the promotion are met. Multiple benefits can be applied to one promotion.

You can apply the following benefit adjustments to a shopping cart:

- **Get Cart Any Item Subtotal [specific] Amount Off**: A discount of a defined monetary amount off of any item in the customer's shopping cart.
- **Get Cart Any Item Subtotal [specific] Percent Off**: A discount of a defined percentage off any item in the customer's shopping cart.
- **Get Cart Item Subtotal [specific] Amount Off**: A discount of a defined monetary amount off a defined item in the customer's shopping cart.
- **Get Cart Item Subtotal [specific] Percent Off**: A discount of a defined percentage off a defined item in the customer's shopping cart.
- **Get Cart Subtotal [specific] Amount Off**: A discount of a defined monetary amount off the subtotal of the customer's shopping cart.
- **Get Cart Subtotal [specific] Percent Off.**: A discount of a defined percentage of the subtotal of the customer's shopping cart.

Note: Sitecore XC does not support applying line item benefits by using cart subtotal qualifications.
You can apply the following benefit adjustment to the shipping cost:

- **Get Free Shipping**: A discount that is equal to the shipping cost of the order. This discount is calculated when the customer goes through the checkout process.

Walkthrough: Working with promotions

This walkthrough expands on the information in the [Work with promotions](#) topic, and describes how to create a promotion. Before following this walkthrough, you must have permissions for the Promotioner and Promotioner Manager roles. If you do not have permissions for those roles, contact your system administrator.

The walkthrough describes how to do the following tasks, using the sample SXA environment and Habitat storefront:

- Create a promotion book and a promotion.
- Associate a catalog and sellable item with the promotion book and promotion.
- Add a qualification to the promotion.
- Add a benefit to the promotion – a 10% discount.
- Add a public coupon to the promotion.
- Request approval for the promotion.
- Approve the promotion.
- Create an order that uses the promotion on the sample SXA storefront to confirm that the promotion has been applied.

The following information is used in this walkthrough:

- The Habitat_Master sample catalog.
- The sellable item Habitat Dwell 2-in-1 Steam Mop.
- The sample coupon code *10offSteamMop*.
- The sample email address *user1@example.org*.
- The sample gift card code *GC1000000*.

Create a promotion book and a promotion

1. In the Sitecore XC Business Tools, click the **Promotions** icon.
2. In the **Promotion Books** section of the **Promotions** dashboard, click **+**.

1. In the **Add** window, enter the name *WalkthroughPromotionBook*, and the display name *Walkthrough Promotion Book*.
2. In the **Promotion Books** section of the **Promotions** dashboard, click the WalkthroughPromotionBook you created.
   Note: The list of promotion books on the **Promotions** dashboard is shown in alphabetical order.
3. In the **Promotions** section of the promotion book details page, click **+**.
4. Enter the name *10offSteamMop*, and the display name *10% off Steam Mops*.
5. Enter the **Valid From** and Valid **To** dates and times.
6. Enter the display text *10% off 2-in-1 Steam Mop*, and the display cart text *10% off 2-in-1 Steam Mop*.
7. Select the **Is Exclusive** check box.

Associate a catalog and sellable item with the promotion book and promotion

1. You must associate a catalog with a promotion book before you can associate any sellable items. In the **Catalogs** section of the promotion book details page, click **Associate**.
2. In the **Associate Catalog** window, select the Habitat_Master catalog from the drop-down list.
   Note: A catalog can only be associated with one catalog at a time. When you associate the Habitat_Master catalog with your promotion, it is automatically disassociated from the sample Habitat_PromotionBook.
3. In the **Promotions** section of the promotion book details page, click the "10offSteamMops" promotion.
4. In the **Items** section of the promotion book details page, click **+**.
5. In the **Add** window, in the **Catalog** drop-down list, select Habitat_Master.
6. In the **Item Id** field, enter *Dwell.* A drop-down list that contains all the sellable items with "Dwell" in the name will be shown. Select "Habitat Dwell 2-in-1 Steam Mop" from the list.
7. To save your information, click the check mark.

Add a qualification to the promotion

1. In the **Promotions** section of the promotion book details page, click the 10offSteamMop promotion.
2. In the **Qualifications** section of the promotion details page, click **+**.
3. In the **Add** window, in the **Condition** drop-down list, select *Cart Item Quantity is in [min] [max] Range?* and click the check mark.
4. In the **Add** window, in select the **Condition Operator** drop-down list, select *And*.
5. In the **Catalog** drop-down list, select Habitat_Master.
6. In the **Minimum Quantity** field, enter *2*, and in the **Maximum Quantity** field, enter *10*.
7. In the **Item Id** field, enter *Dwell*. A drop-down list that contains all the

sellable items with "Dwell" in the name is shown. Select "Habitat Dwell 2-in-1 Steam Mop" from the list.

8. To save your information, click the check mark.

Add a benefit to the promotion

1. In the **Benefits** section of the promotion details page, click **+**.
2. In the **Add** window, select *Get Cart Item Subtotal [specific] Percent Off* in the **Action** drop-down list and click the check mark.
3. In the **Percent Off** field, enter *10*, and in the **Catalog**, click select Habitat_Master.
4. In the **Item Id** field, enter *Dwell.* A drop-down list that contains all the sellable items with "Dwell" in the name is shown.
5. Click "Habitat Dwell 2-in-1 Steam Mop" from the list.
6. To save your information, click the check mark.

Add a public coupon to the promotion

1. In the **Public Coupons** section of the promotion details page, click **+**.
2. In the **Add** window, in the **Code** field, enter the name *10offSteamMop*.

Request approval for the promotion

1. In the **Details** section of the promotion details page, click the drop-down arrow and select **Request Approval**.
2. In the **Request Approval** window, enter an optional comment. For example, *Walkthrough promotion request.*

Approve the promotion

This task is performed by the Promotioner Manager.

1. In the **Details** section of the promotion details page, click the drop-down arrow and select **Approve**.
2. In the **Approve** window, enter an optional comment. For example,

Walkthrough promotion approval.

Create an order that uses the promotion on the sample Habitat storefront to confirm the promotion has been applied

1. In a browser window, open the sample Habitat storefront.
2. Search for or navigate to the product detail page for the Habitat Dwell 2-in-1 Steam Mop. This is found in Appliances > Small Appliances.
3. Add 13 of the product to the shopping cart, go to the shopping cart icon, and select **View Cart**.
4. Enter *10offSteamMop* in the discount code field, click **Add discount code**, and confirm that the 10% discount has not been applied to the total.
5. Change the amount of the product in the shopping cart to 3.
6. Confirm that the 10% discount has now been applied to the total, with the text "10% off Steam Mop discount" shown under the unit price.

Orders

Sitecore XC enables you to manage all aspects of the order life cycle, payment and fulfillment options, managing items in pending orders, and managing RMAs (Return Merchandise Authorizations) and refunds.

Orders are integrated with customer information. When you view a customer's account information, a list of the customer's orders is shown. Clicking an order number takes you to the details of the order. For more information, see the [Customers](#) topic.

A Customer Service Representative (CSR) or Customer Service Representative Administrator can perform the following tasks on an order:

- View order details, including the date the order was made, grand totals, payment totals including any pending amounts, and payment types.
- Process returns and RMAs.
- List the entitlement sellable items that are associated with an order, including any disabled or canceled entitlements, such as a subscription service the customer canceled.
- Add new items, edit item amounts, or delete items for pending orders.
- Release an order from an on-hold status, undo changes to an order that is on hold, cancel an order, or set the fulfillment on an order.

Work with orders

Sitecore XC Business Tools enable a Customer Service Representative (CSR) or Customer Service Representative Administrator to manage customer orders. The **Orders** dashboard shows the total number of orders in the system and their status.

The following diagram shows the possible workflows for an order:
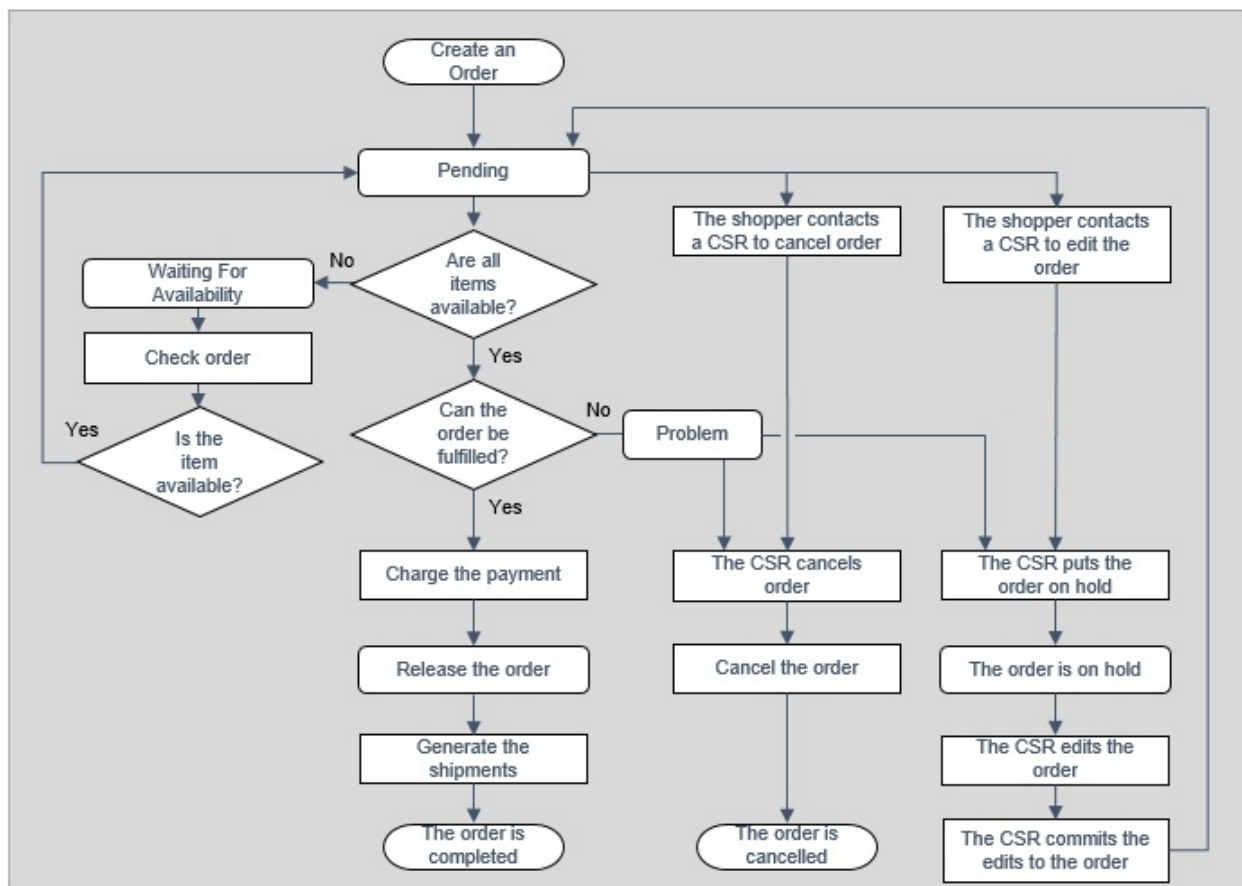
This topic describes how to:

- Put an order on hold.
- Cancel an order.
- Void and refund the payment on an order.
- Commit, undo the changes, or cancel the hold on an order.
- Set the fulfillment on an order.

- Edit or delete an item on an order.
- Add an item to an order.
- Add an additional payment to an order.
- Request a Return Merchandise Authorization (RMA) for an order.

Put an order on hold

Only orders with a status of Pending or Problem can be put on hold.

1. In the **Orders** section of the **Orders** dashboard, select **Pending** or **Problem** from the drop-down menu. You can also search by order confirmation number, instead of viewing all orders with a status of **Pending** or **Problem**.
2. On the **Pending** or **Problem** details page, click the confirmation number of the order you want to put on hold.
3. In the **Summary** section of the order details page, select **Hold Order** from the drop-down menu.

Cancel an order

Only orders that have a status of On hold or Problem can be cancelled.

1. In the **Orders** section of the **Orders** dashboard, choose **On Hold** from the drop-down menu. You can also search by order confirmation number, instead of viewing all orders with a status of **On Hold**.
2. On the **On Hold** details page, click the confirmation number of the order you want to put on hold.
3. In the **Summary** section of the order details page, select **Cancel Order** from the drop-down menu.

Void and refund the payment on an order

You can void and refund the payment on orders with a status of On Hold, or refund the payment for a completed order.

1. In the Payments section of an order details page, click Voids a payment.
2. In the Void window, click the check mark to confirm that you want to void the payment.
3. Return to the Payments section of the order details page and click Refunds a payment.

Commit, undo the changes, or cancel the hold on an order

An order with the status of **Committed** will automatically be sent through the fulfillment and released steps of the orders process, and then be moved to the final status of **Completed**.

When you undo changes to an order, the order will stay on hold. When you cancel the hold on an order, the order is automatically changed to **Pending**.

To commit, undo changes, or cancel an order:

- In the **Summary** section of an order details page, select **Commit On-Hold Order**, **Undo Changes**, or **Cancel Hold** from the drop-down menu.

Set the fulfillment on an order

1. In the **Summary** section of an order details page, select **Set Fulfillment** from the drop-down menu.
2. In the **Set Fulfillment** window, select **Select delivery options by item** or **Ship items** from the drop-down menu.
3. In the **Set Fulfillment** window, select a country from the drop-down list.
4. In the **Set Fulfillment** window, enter the state, the first and last names of the customer, the address name, city, and the ZIP or postal code. The phone number is optional.

In the **Set Fulfillment** window, select the fulfillment option name from the drop-down list.

Edit or delete an item on an order

1. In the Line Items section of an orders details page, select the item you want to edit or delete.
2. Select Edit or Delete from the drop-down menu.
    - If you select Edit, enter the new quantity of the item.
    - If you select Delete, confirm the deletion.

Add an item to an order

1. In the **Line Items** section of an order details page, select **Add** from the drop-down menu.
2. In the **Add** window, enter the item ID and quantity. The required format for the item ID is *catalogID|productID|variantID*. If the item does not have a variant, the required format of the ID is *catalogID|productID|*.

Add an additional payment to an order

When items have been added to an order, an additional payment must be added.

Note: When you add an additional payment to an order, the amount you add must be the full payment that matches the grand total of the order.

1. In the **Payments** section of an order details page, click **+**.
2. In the **Add** window, select the payment type to apply from the drop-down list and click the check mark.
    1. If you chose **Federated**, the **Add** window will now have a PayPal button, or fields for Card Number, Expiration Date, Amount, and Country.
    2. If you click PayPal, a PayPal checkout window will open.
    3. If you enter the information for a credit card, the **Add** field will now have an **Option** button to validate the credit card information.
    4. If you chose **Gift Card**, the **Add** window will now have fields for the gift card code and the amount.

3. In the **Add** window, enter the payment amount and customer details.

Request a Return Merchandise Authorization (RMA) for an order

1. In the **Search** section of the **Orders** dashboard, enter the confirmation number of the order that has the item a customer has requested to return.
2. In the **Line Items** section of the order details page, select the requested sellable item, and select **Request RMA** from the drop-down menu.
3. In the **Request RMA** window, select a reason from the drop-down list. The reasons for an RMA are *"The wrong item was sent."* or *"Customer did not like item."*
4. Enter the quantity of the item to be returned.
5. Click the check mark to save your information. A new **Request RMA** window will appear.
6. In the **Request RMA** window, select **Want to Continue**.

Note: If you do not select **Want to Continue**, the **Request RMA** process is canceled.

Walkthrough: Working with orders

This walkthrough expands on the information in the [Work with orders](#) topic. Before following this walkthrough, you must have permissions for the Customer Service Representative (CSR) role. If you do not have permissions for this role, contact your system administrator.

This walkthrough describes how to do the following tasks, using the sample Habitat storefront:

- Create a sample order.
- Put the order on hold.
- Add an item to the order.
- Add an additional payment to the order.
- Commit the order.

The following information is used in this walkthrough:

- The sample email address *user1@example.org.*
- An order for 5 of the Kid's Furry Friends Rabbit Ear Headphones.
- The gift card code *GC1000000.*
- The sellable item ID *Habitat_Master|6042222|56042225* (Minnow Kid's Tablet—7", 8GB—Wifi).

Create a sample order

1. In a browser window, open your sample Habitat storefront.
2. Search for or navigate to the Kid's Furry Friends Rabbit Ear Headphones product. This is found in the Audio > Headphones node.
3. Add five of the product to the shopping cart, go to the shopping cart icon, and select **Checkout**.
4. Select **Ship items** from the **Delivery preferences** drop-down list.
5. Enter a sample name, city, country/region, address, and state/province in the required shipping address fields. For example, *Jane Doe, Seattle, USA, 123 Sample Lane, WA.*

6. Click **View shipping options**, select a shipping option, and click **Continue to billing**.
7. In the **Email address** and **Confirm email address** fields, enter the email address *user1@example.org*.
8. Select **Apply gift card**, then enter the *GC1000000* gift card code.
9. Click **Get balance** then click **Apply full amount**. Click **Add gift card**, and then click **Continue to confirmation**.
10. Click **Confirm order**, and make a note of the order confirmation number.

Put the order on hold

1. In the Sitecore XC Business Tools, click the **Orders** icon.
2. In the **Search** field of the **Orders** dashboard, enter the order confirmation number of the order you created, and click ENTER.
3. In the **Results** section of the **Orders** dashboard, click the confirmation number of the order.
4. In the **Summary** section of the order details page, select **Hold Order** from the drop-down list.
5. In the **Hold Order** window, click the check mark.

Add an item to the order

1. In the **Line Items** section of the order details page, select **Add** from the drop-down list.
2. In **Item** field in the **Add** window, enter the item number *Habitat_Master|6042222|56042225*, and *1* in the **Quantity** field.
3. In the **Line Items** section of the order details page, confirm that a Minnow Kid's Tablet—7", 8GB—Wifi has been added to the order.
4. In the **Details** section of the details page for the order, make a note of the new grand total of the order, which should now be larger than the payment. Make a note of the new grand total.

Add an additional payment to the order

1. In the **Payments** section of the order details page, click **+**.
2. In the **Add** window, in the **Option** drop-down list, select **Gift Card** and click the check mark.
3. In the **GiftCardCode** field, enter the sample *GC1000000* gift card code, and in the **Amount** field, enter the new grand total of the order.
4. In the **Amount** field, enter the new grand total.
5. In the **Details** section of the order details page, confirm that the grand total and payment amounts now match.

Commit the order

1. In the **Summary** section of the order details page, select **Commit On-Hold Order** from the drop-down list.
2. In the **Commit On-Hold Order** window, click the check mark.

The committed order will now automatically be sent through the fulfilment and released steps of the orders process, and then be moved to the final status of **Completed**.

Customers

Sitecore XC Business Tools allow you to edit and manage customer information.

Customer information is integrated with order information. When you view a customer's account, their order history is shown in addition to the account details. The order history information includes the following:

- Every order the customer has placed.
- The current status of every order.
- Any entitlements the customer has purchased.

For more information, see the [Orders](#) topic.

A Customer Service Representative (CSR) or Customer Service Representative Administrator can perform the following tasks on customer accounts:

- Edit customer accounts. This includes:
  - Editing names, phone numbers, and email addresses.
  - Changing the language associated with the account.
  - Changing or adding addresses to the account.
- Track customer orders.

Work with customer accounts

Sitecore XC lets Customer Service Representatives (CSRs) and Customer Service Representative Administrators to manage and update customer accounts.

The **Customer Orders** section of a customer details page lists all of the orders a customer has made. Clicking the confirmation number of an order will open the order details page in **Orders**.

This topic describes how to:

- Add an address or edit the details of a customer account.

Add an address or edit the details of a customer account

1. In the Addresses section of a customer details page, click +.
2. In the Add window, select a country from the drop-down list, click the check mark, and then enter the details of the address.
3. In the Details section of a customer details page, click Edit. You can edit every field except the account number.

Relationship definitions

Sitecore XC helps you increase sales by enabling you to create relationships between sellable items for cross-sells and upsells.

A cross-sell relationship is one that identifies an additional product that is related to the product a customer is buying, or has already bought. For example, if a customer had added an XSound CD Bluetooth In-Dash Receiver, the store may also show a set of XSound 6 1 2" 2-Way Coaxial Car Speakers as a related product.

An upsell relationship is one that shows customers that there are different, higher-priced versions or models of the product that they're browsing that may be better for their needs. For example, if a customer is browsing the XSound 1" Coaxial Tweeters that have a sell price of $39.99, an upsell relationship could be set to additionally show the XSound .75" Coaxial Tweeters that have a list price of $59.99.

In Sitecore XC, there are predefined relationship definitions for catalogs, categories, and sellable items. Additional relationship types can be added by your development team. The predefined relationship definitions are the following:

- **Sitecore.Commerce.Plugin.Catalog.SellableItem, Sitecore.Commerce.Plugin.Catalog**. A relationship from a catalog to a sellable item.
- **Sitecore.Commerce.Plugin.Catalog.Category, Sitecore.Commerce.Plugin.Catalog**. A relationship from a catalog to a category.
- **Sitecore.Commerce.Plugin.Catalog.Catalog, Sitecore.Commerce.Plugin.Catalog**. A relationship from a catalog to another catalog.

Individual sellable items automatically have the following predefined relationships:

- **InstallationProduct.** A cross-sell relationship for installation entitlement products. For example, if a customer is buying a dishwasher, the store may also show an installation service that the customer can add to their order.
- **RelatedProduct.** A cross-sell relationship for different products that are related to the product the customer is buying.
- **TrainingProduct.** A cross-sell relationship for training products. For example, if a customer is buying a complex software product, the store may also show possible online training courses that the customer can add to their order.
- **WarrantyProduct.** A cross-sell relationship for warranty products. For example, if a customer is buying a dishwasher, the store may also show possible extended warranties the customer can add to their order.

Work with relationship definitions

Sitecore XC enables you to create custom relationships, such as upsell or cross-sell relationships, between catalogs, categories, and sellable items.

This topic describes how to:

- Create a relationship definition.
- Associate catalogs, categories, or sellable items to the relationship.

Create a relationship definition

1. To open the Relationship Definitions dashboard, click Relationship Definitions in the left navigation pane.
2. In the Entities section of the Relationship Definitions dashboard, click a relationship type.
3. In the Relationship Definitions section of the relationship entity details page, click +.
4. In the Add window, enter a name and display name. The description is optional.
5. Select the target type from the Target Type drop-down list.
6. If you want a list of related entities to be automatically rendered on the Merchandising dashboard for a catalog, category, or sellable item, choose Render List Automatically.

Associate catalogs, categories, or sellable items to a relationship definition

Note: The following task uses the example of associating a catalog with a category. To associate a category or sellable item to a relationship, go to the details page of a category or sellable item.

1. In the Catalogs section of the Merchandising dashboard, click the name of a catalog.

2. If the Render List Automatically check box was chosen when a relationship was created, a section with the display name of that relationship will be at the bottom of the catalog details page.
3. Select the name of a relationship, and then click Associate.
4. In the ID field, type a word from the display name of the category, and select a category from the drop-down list.

Composer

The Sitecore XC Business Tools allow you to customize the information displayed for any Commerce item. You can add new properties to any of the following Commerce items:

- catalogs
- categories
- sellable items
- inventory sets
- price books
- price cards
- promotion books
- promotions
- customers

When you add new properties to a Commerce item, you create a new child view for the item. If you want to apply the new set of properties to more than one Commerce item, you convert the new child view to a Composer template to make it available to other Commerce items.

You can use a Composer template to apply custom properties to a specific Commerce item, a subset of Commerce items, or to all Commerce items of a certain type (for example, all catalogs).

When you add a new property to a Commerce item, you specify a data type for the property (that is, the kind of value expected for the property, such as a string or a decimal). Depending on the data type you select, you can further define constraints for values permitted for the property.
Note: You must be assigned to the Commerce Server Administrator role to access this functionality.

Work with custom properties

Sitecore XC allows you to extend the properties associated with a Commerce item, and to make those properties available to other Commerce items.

This topic describes how to:

- Add a new custom child view to a Commerce item
- Convert a child view to a Composer template
- Apply a Composer template to other Commerce items

Add a custom child view to a Commerce item

This procedure describes how to add a child view to a catalog. You can use these same steps to add a child view to any other Commerce item.

To add a custom child view:

1. Open the Merchandising dashboard.
2. In the Catalogs section, click on a catalog.
3. On the catalog **Details** page, open the drop-down menu in the **Summary** section and select the **Add View** option.
4. In the **Add View** window, enter an internal name and a display name for the child view.
5. On the catalog **Details** page, open the drop-down menu in the new Child View and select the **Add Property** option.
6. In the **Add Property** window, enter an internal name and a display name for new property, and choose a data type. Possible values are:
    - String
    - DateTimeOffSet
    - Decimal
    - Integer
    - Boolean
7. Depending on the data type of the new property, you can optionally configure a constraint on the permitted values for the property.

- For properties of type "integer" or "decimal", you can configure a minimum-maximum constraint (open the drop-down menu and select the **Add Min-Max Constraint** option).
- For properties of type "string" you can specify a set of permitted values (open the drop-down menu and select the **Add Selection Option Constraint** option).

Convert a child view to a Composer template

To convert a custom child view to a template:

1. In the custom child view section, open the drop-down menu and select the **Make Template** option.
2. In the **Make Template** window, specify an an internal name and a display name for the custom view template.
3. Click on **Composer** in the left navigation pane to open the **Composer** dashboard and verify that the custom view is listed in the **Templates** section.

Apply a Composer template to other Commerce items

You can apply a custom child view (and its properties) to other Commerce items, at different levels of granularity:

- To apply the template to a single Commerce item (for example, a sellable item), add a tag to the Composer template, and add the same tag to the corresponding Commerce item. Any item that shares a tag with the Composer template inherits the properties in that template.
- To apply the template to all Commerce items of a certain type (for example, all categories), use the **Link to Entities** function on the **Composer** dashboard (and select the appropriate entity type).
- To apply the template to a subset of Commerce items (for example, a group of sellable items), associate the template to one or more Item Definitions (which have been defined in a catalog), and ensure that the

apopropriate sellable items are associated with the same Item Definition (in their **Details** page).

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