

Elastic Path™ Commerce 6.1.2

Application Feature Guide



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Introduction

Elastic Path Software provides an enterprise ecommerce platform for the easiest and most cost-effective way to deliver custom ecommerce solutions. Enterprises can benefit from the best of both worlds—the rich out-of-the-box features of a packaged solution as well as the full development environment to build in house. The Java-based platform was meant to be extended with full access to source code for easy integration with existing systems. IT teams have unlimited flexibility and control to develop innovations for business users with a faster time to market. Major global brands such as Aeroplan, Time Inc, and Samsonite rely on Elastic Path.

Key Benefits

- Customize multiple stores for specific customers or brands easily and affordably
- Attract shoppers who are ready to buy with pioneering Search Engine Optimization (SEO)
- Help shoppers find the products they want with powerful in-site search and filtered navigation
- Boost order value with flexible, easily configured merchandising and promotions
- Reduce cart abandonment with quick checkout and pre-checkout shipping and tax calculations
- Increase employee productivity with a superior management and customer service application
- Improve customer service or open a new sales channel with full call center order management
- Minimize upfront and ongoing costs with the use of innovative, proven open-source components
- Improve overall customer experience and reduce cost by managing multi-channel data via web services
- Reduce update & maintenance effort by using dynamic imaging to create multiple image size from a single master file

Marketing & Merchandising

Multi-Store Management

Multi-Store Management

Tailor multiple stores to specific customers, brands, products, styles, seasonal ranges or geographies easily and cost-effectively. All stores can be managed from a single Commerce Manager.

- Additional stores can be created directly from the CM Client with minimal IT involvement
- "Virtual catalogs" enable as much sharing of catalog information between stores as you wish - each store can have a unique catalog or offer identical products at different prices whilst allowing precise control of inclusion and exclusion of products between stores.
- Granular control over CSR permissions down to specific stores or catalogs
- In-site search consolidates functions and indices for all stores in one place for optimal performance, increased scalability and reduced maintenance
- Stores can be previewed in a restricted access state during UAT and soft launch phases
- Control all aspects of a store's configuration including supported currencies, languages, accepted payment methods, taxes, shipping, search and navigation behaviour and more.
- Share customers between stores allowing a single customer registration to access multiple stores.

UI Themes

UI themes can be used by multiple stores. This minimizes efforts to set up new stores where look and feel is consistent to the theme. When a given store has UI differences but an overall similarity to the theme, specific UI assets e.g. html templates, css, JavaScript & static images can be overridden; otherwise the defaults provided within the theme will be used.

Content Management

CMS Publishing

Manage static store content (templates, images, CSS, etc.) within your existing Content Management System and publish directly to Elastic Path environments without requiring the overhead of IT release schedules or procedures.

Dynamic Content

Dynamic content allows the store marketing team to deliver marketing campaigns in the form of banner ads and other relevant store content to shoppers in one or more storefronts. Numerous types of content can be used including but not limited to images, Flash, HTML, products and categories.

Targeted selling rules can be used to deliver applicable dynamic content to the shopper based on required segmentation rules. The content can be placed in pre-created content spaces on any pages(s) within a store(s).

Examples of dynamic content banners include free shipping, sale information, special offers, information on new product releases, etc. Dynamic content allows the marketing team to personalize the online store experience without IT help or server outage. This improved experience will help increase transaction sizes and build shopper loyalty.

SEO & Promotions

Search Engine Optimization

Each Category and Product can be configured with a title, keyword and description metadata for search engine optimization (SEO). A unique, spider-friendly URL is generated by the system or can be assigned manually to access the given category or product. This dramatically increases the ranking of your site products in popular search engines such as Google & Yahoo.

Promotion Engine

The Promotion Engine allows non-technical business users to create complex store promotions with no programming. Promotions are created by choosing one or more rule elements which can include:

- Customer segments (whom the promotion applies to)
- Conditions (what business rules cause the promotion to be offered)
- Exclusions (what categories, products or SKUs are excluded)
- Actions (what the shopper receives).

Two types of promotion exist:

- Product catalog promotions
- Shopping cart promotions

Limitations can be set in promotions in order to restrict the number of shoppers who can take advantage of a given promotion or coupon code.

Additional custom rule components can be created by developers.

Gift Certificates

Customers can purchase gift certificates in any amount permitted by the store. Both purchase and redemption of gift certificates are entirely online. Recipients receive an email with full redemption instructions and can use the certificate like any other form of payment. Gift certificate use and balance can be checked through online account self-service.

Personalization and Shopper Segmentation

NEW in 6.1.2 Targeted Selling

Targeted selling allows you to execute specific sales behaviors based on shopper, time, or store conditions. Shopper conditions are parameters that define who should be targeted. Time conditions are parameters that define when the targeting should occur. Store conditions are parameters around where (which stores) the targeted should occur. Once shopper, time, and store conditions have been built by the marketer, they can be saved and re-used in a variety of ways to personalize the shopping experience in the store. The targeted selling engine provides complete flexibility for the marketer but comes with basic tags such as geo location tags, shopping cart tags, browse behavior tags, customer profile tags, and order history tags. Your development teams can leverage the power of the targeted selling engine to implement unique customer experiences in a storefront. Targeted selling is delivering a different shopping experience to different customers based on what you know about them. If you are able to create a more relevant shopping experience for your customers then you can improve conversion rates, average order values, customer satisfaction, and brand loyalty.

Product Catalog Management

Catalogs

Create and maintain multiple catalogs for different stores or suppliers. Create virtual catalogs to have a filtered subset of products from one or more other catalogs.

Categories

Create and manage an unlimited number of categories and subcategories with as many levels of categories as you require. Categories can have an unlimited number of additional fields which are explained in the Attribute Management section below.

Products

Create and manage an unlimited number of products. Each product is based upon a product type which defines the available attributes, and behavior of the product.

SKU's (Product Variations)

Some products have multiple SKU's. Examples of these are clothing with different sizes and colors of the same product item. Each SKU is defined based on a set of predefined SKU options.

Display of Categories & Products

Each category and product can be displayed using a different custom template allowing for very tight control over look & feel.

Product in Multiple Categories

A product can be assigned to multiple categories. For example, a shirt might be added to a "New Items" category as well as the "Men's Shirts" category.

Product Pricing

Products support both List & Sale prices for each configured currency in the store. In addition price tiers can be created for any product allowing for volume based discounting.

When a product has multiple SKU's by default each SKU inherits its parent product price, however the pricing for a specific SKU can be overridden if required, allowing for example specific sized of clothing to be discounted.

Virtual catalogs can have price overrides allowing specific pricing for different store fronts.

Digital / Soft Goods

Products / SKU's can have digital goods, such as MP3 files or other downloadable software files attached to them. These goods are released for download once payment has been accepted and/or the order has been processed by an administrator.

Downloads are audited and download limits and expiry dates can be set to control download volumes after purchase.

Dynamic Image Engine

All product & category images are created from a single-master image, which greatly reduces the time and costs for image production and upload. As different sized images are required by the store the Dynamic Image Engine automatically creates the required image from the master image.

Asset Manager

The asset manager allows you to upload and assign images, files or digital assets to the catalog and assign them accordingly to categories, products or SKU's as required.

Merchandising Items

Products can have an unlimited number of other products assigned to them as merchandising relationships. Cross-Sells, Up-Sells, Accessories, Warranties and replacement items are supported.

Merchandising items can be displayed on product, shopping cart, checkout and/or receipt pages.

Product / Category Search

Ability to search for products or categories in the catalog.

Inventory by Product Variation	Inventory is tracked at the product variation (SKU) level. Each variation can have an inventory level, reserve quantity, and reorder minimum.
Reserve Quantities	Reserve quantities are useful if there is a certain amount of stock that must be kept on hand.
Reorder Minimum	When the reorder minimum is reached, the item is added to a low stock report.
Adjust Inventory	Inventory can be added or removed for a given SKU/product, thus allowing stock corrections, returns etc.
Upload Inventory	Received products can be added to inventory through the upload of an inventory file in CSV format.
Out of Stock Visible	If an item is out of stock, it can optionally be displayed on the storefront as out of stock or hidden completely.
Optional Inventory Tracking	SKU's can either have Inventory Tracking enabled or disabled. Products with a presumed infinite stock can have Inventory Tracking disabled such that stock is not required to be managed for these items.

Attribute Management

Catalog Attributes	Enrich catalog (categories, products & SKU's) data with unlimited custom attributes / metadata. This allows the presentation of product or category specific data to the user without the need for any customization.
Attribute Types	<p>The following attribute types are available:</p> <ul style="list-style-type: none">• Text - Long: Use this type to display category or product descriptions.• Text - Short: Use this type to display short product details, e.g. technical specifications.• File: Use this type to attach supporting files to a product, Useful for documents e.g. product manuals etc.• Image: Use this type to attach additional / alternative images to a product or category.• Date: Use this type to display a date.• Boolean: Use this type for attributes which can only have value TRUE or FALSE.• Whole Number: Use this type for integers.• Decimal Number: Use this type to validate that the input for this attribute is a decimal number. For example, you would use this attribute type to store any type of dollar amount.

Category Types

Different category types can be created to represent different categories required in the store. Category attributes can be mapped to each category type.

Product Types

Product types can be created for the different product ranges sold in the store.

Each product type can have any number of product attributes mapped, thus allowing product metadata to be stored and displayed in the store. Product types also define if a product has a single SKU or multiple SKUs.

Customer Experience

Shopping Experience

- CSS Display Templates** Each screen in the storefront is stored as a separate template giving HTML/web designers with almost no programming experience the ability to completely control the look and feel of the store.
- Multiple Languages** The storefront can be configured to support almost any language, including Unicode languages such as Chinese. Shoppers can select from all configured languages. It is up to the store administrator to create the appropriate localized content for each language.
- Multiple Currencies** The storefront can be configured to support almost any currency. Once multiple currencies are configured, the store can be configured to allow currency selection or can default to a currency based on site URL. All store pricing is displayed and calculated in the chosen currency. Administrators can manage multi-currency storefronts by providing currency-specific prices for each product in the catalog or by allowing the platform to calculate currency-specific prices from a base price using a supplied conversion rate. Multi currency prices are also supported for shipping rates.
- Catalog Browsing** Shoppers can browse through an unlimited number of categories and subcategories in the product catalog until they arrive at a product list page from which they can choose a product to view in detail. Different categories can be displayed using different templates, allowing category promotions, marketing messages, top sellers and featured items to be displayed for each individual category. Catalog browsing also includes Filtered Navigation.
- Results Sorting** Product search results can be sorted by Search Relevance, Price, Name, or Top Sellers, allowing customers to find the most relevant results easily.
- Filtered Navigation** Filtered Navigation allows customers to narrow down search results and product categories based on product attributes to quickly find the products they seek.
- Product Search** Shoppers can search for products by name, SKU, brand name, description or any other defined product attribute. Searching is fully indexed with the Jakarta Lucene engine to ensure fast search results regardless of the size of your product catalog. The search engine implements fuzzy search logic to accommodate misspellings, alternate spellings and plurals.

- Product Display** Each product is displayed on a separate page along with all of its SKU variations (i.e. different sizes, colors, etc) and any cross-sell or up-sell products. Different products can be displayed using different templates and can also have extended attributes for storing additional information.
- Tiered / Volume Pricing** Products can have multiple pricing levels based on order volume to motivate larger purchases or provide discounts to shoppers who make purchases in larger quantities.
- Shopping Cart** Once shoppers find a product they wish to purchase, they can add it to their shopping cart. The shopping cart displays editable quantities and thumbnails of all products in the cart along with a running total cost including tax and shipping estimates. Coupon codes may be applied within the shopping cart to trigger a valid promotion.
- Persistent Shopping Cart** Customers' shopping carts remain intact between store visits, reminding customers of items they previously considered and simplifying purchase when they next visit the store.
- Customer Checkout / Registration** Shoppers can proceed to checkout with or without an existing account, and can either purchase as a guest or create an account during the checkout process. Creating a password-protected account provides a faster checkout process for repeat customers, allowing them to retrieve saved addresses and credit card details and also gives them access to self-service account management tools.
- Shipping Options** Shoppers can specify which address they wish to use for billing and shipping. Based on the shipping methods configured by the store administrator, shoppers can also choose from various shipping options, rates and service levels. Shipping service levels can be configured for different shipping regions, allowing a store to offer different shipping options and rates dependent on the delivery states or country.
- Payment Options** Shoppers can choose from various payment options configured by the store administrator. The store administrator can configure which credit card types can be accepted and use supported payment gateways including: Cybersource and PayPal (Payflow Pro, Direct Payment, Express Checkout). Credit card security codes are supported. Additional payment options can be added easily.
- Email Notifications** Customers are automatically sent an email notification after various events such as account registration, purchase completion and order shipment.

Product Recommendations

When viewing products in the catalog, customers can view similar recommended items, which are generated automatically based on the previous purchases of other customers.

Shopping Cart Shipping Estimates

Shipping estimates can be calculated and promotional codes applied on the shopping cart page prior to customer registration.

Guided SKU Selection

Guided SKU selection allows storefront users to answer questions or choose options that will guide the user to a specific product SKU variation that meets their needs. For example a sweater may come in 20 different size and color combinations. Guided SKU selection allows the user to select the required size and color via dropdown lists or images. Upon user selection, the system can either validate the size and color combination, or narrow the available colors based on size and inventory.

Web Receipt

Upon successful checkout, the customer is presented with a printable receipt confirming the purchase.

Customer Password Encryption

Customer passwords are securely encrypted in the Elastic Path database.

Saved Credit Cards

During checkout, customers can opt to save their credit card details to expedite future purchases. Credit card details are securely stored and encrypted using 256 bit AES encryption mechanisms. Customers can delete and modify credit card details in the store self-service area.

Cookies

Store cookies on the customer's browser to facilitate personalization features and store analytics.

Top Sellers

Lists the top selling items in the store. Top selling items can be displayed on the site home page or category pages.

Site Map

From the store footer a site map link is offered. Clicking on this link will display an automatically generated site map, consisting of categories & sub-categories which link into site map specific product list pages. These links are optimized for SEO to allow easy indexing of catalog products by the major search engines.

Product Stock Availability

Allow customers to see stock availability and expected re-stock dates for out of stock products. For example showing "Only 4 remaining in stock" can prompt a customer to make an immediate purchase.

Back-Orders	Allow customers to place orders for out-of-stock merchandise. Payments will not be authorized until the product is shipped.
Pre-Orders	Allow customers to place orders for merchandise that is not yet available. Payments will not be authorized until the product is shipped.
Wish List	Customers may add products to their “Wish List”. A copy of the wish list can be e-mailed to friends or family along with a customized message.
Recently Viewed Products	Allows a customer to view a summary of the last 5 products viewed in the store, typically used in the shopping cart.
Customer Sign In / Authentication	Customers who have previously created an account can sign into their account giving them access to all customer self-service tools.

Customer Self-Service

Forgotten Password	Customers who have forgotten their password can enter their email address to have a new password emailed to them.
View Order History	Customers can view a list of all previous orders placed under their account.
View Order Details	Customers can view the status and other details (such as payment information) of all previous orders placed with their account
Manage Address Book	Customers can add, update and delete billing or shipping addresses and specify a default shipping address
Manage Credit Cards	Customers can view, add, remove and edit stored credit card details
Change Email / Password	Customers can change their email address, personal information or password.
HTTPS/SSL	All authenticated pages in the Store are forced into SSL/HTTPS then ensuring the security of personal information.

Customer Personalization

Returning customers are automatically recognized and presented with a personalized greeting and can gain access to saved preferences, shopping cart, wish list and recently-viewed product list

Site Operations

Order & Customer Management

Search for Orders

Search for orders by various criteria such as: order number, customer email, customer name, date range, product SKU, order status etc.

View Orders

View a paginated list of all orders based upon provided search criteria

Create Orders

Create an order on behalf of a customer, for example when taking an order over the phone

View Order Details

View all details of any existing order

Update Order

Update various aspects of an existing order. Add or remove items from an order, update payment or shipping information, append internal notes, process refunds or exchanges etc.

Shipment Management

Manage order shipments, create new shipments, move items between shipments

Return Management

Create and manage returns, including processing of refunds and/or exchanges. Refunds/exchanges may be delayed pending return of physical goods or not. Refunds or additional payment captures are processed automatically.

Comprehensive Order Auditing

Automatic, tamper-proof audit tracking of each order over its entire life within Elastic Path. Each order event (creation, modification, cancellation etc.) generates an audit record in the Elastic Path database.

Search for Customers

Search for customers by various criteria such as: last name, email address, etc.

View Customer Details

View details of any existing customer.

View Order History	View a list of all previous orders placed under this customer account.
Manage Address Book	Add customers' billing or shipping addresses, specify a default shipping address, update and delete addresses.
Change Email / Password	Change customer email address or password.
Manage Credit Cards	Add customer credit cards, view card details (user role dependent), update card details and delete cards.

Shipping Management

Warehouse Picklists & Packing Process	Automatically print warehouse picklists and packing slips and track orders through the picking and packing process. Upon completion of packing, the system captures payment and releases the order for shipping (or notifies that payment capture failed).
Shipping Regions	Shipping regions can be created allowing different shipping service levels to be offered for different geographic delivery locations.
Shipping Service Levels	Shipping service levels can be defined for any given shipping region. Choose from the following configurable options: <ul style="list-style-type: none">• Fixed Price• Percentage of Total Order Price• Cost per Unit Weight• Fixed Base and Cost per Unit Weight• Fixed Base and Percentage of Total Order Price

Tax Management

Sales Tax Codes	Create and manage sales tax codes to match the types of products you are selling. Each product type is assigned a 'default' sales tax code, which can be overridden at the product level.
Tax Categories	Create and manage taxes as needed for your business.
Tax Jurisdictions	Create and manage tax jurisdictions (regions consisting of country, sub country, city and even zip code level). Tax calculations can be configured as inclusive (Europe) or exclusive (North America) for each tax jurisdiction.

Fine-grained Control over Tax Values

Specify the applicable tax rate for a specific sales tax code, tax category and jurisdiction.

User Management

Role-Based Security

Fine-grained control over individual administrator and CSR permissions within the Commerce Manager application. Permissions can be assigned for specific tasks, catalogs, stores etc. Permissions can be managed by individual or by group

User Groups

Create and manage Commerce Manager user groups such as "Customer Service Representative", "Catalog Editor", "Super User", etc.

Users

Create and manage Commerce Manager users then assign users to groups.

Permissions

Grant and manage user permissions at both a high level (ex: "Orders: all functions") and a low level (ex: "Orders: View").

Data Import / Update Management

Import / Export Tool

This standalone tool allows for the import and export of catalogs, categories, and products via Java API and Command Line execution. Within the Commerce Manager, EP-SQL language is used for advanced searching to provide export criteria definition.

The import / export tool can be used to:

- Propagate catalog changes between Elastic Path environments (i.e. from a staging or UAT to a production server)
- Export catalog data to price comparison engines

- Import / Export catalog data, promotions, and system settings to / from 3rd party systems and applications

Import Wizard

The import wizard allows catalog data to be imported from CSV files into Elastic Path. The following catalog data can be imported through the import wizard:

- Categories
- Products
- SKU's
- Merchandising Relationships
- Product / Category assignments
- Price Lists

System & Store Settings

Settings Management

- Extendable settings framework allows for custom project or store specific settings to be created
- No need for store server restarts after configuration changes ensuring high store front availability
- Settings can be modified at any time from the CM client with interfaces for marketing users and system administrators
- Centralised consolidation of all system, store and application component settings in the database.
- Manage search indexes and force index rebuilds from with the CM Client.

Reporting

Reports

Basic operational reports such as orders by status, low stock, new customer registrations and returns/exchanges can be generated automatically within the Commerce Manager's Reporting activity.

Web Services

Web Services

Elastic Path Commerce provides a well-defined web services API to enable customization and integration with back-end systems.

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