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ZNODE MARKETPLACE 8.1.1 USER MANUAL

October 2015



Znode 8.1.1 Advanced Manual

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1 REVISION HISTORY

[illegible]

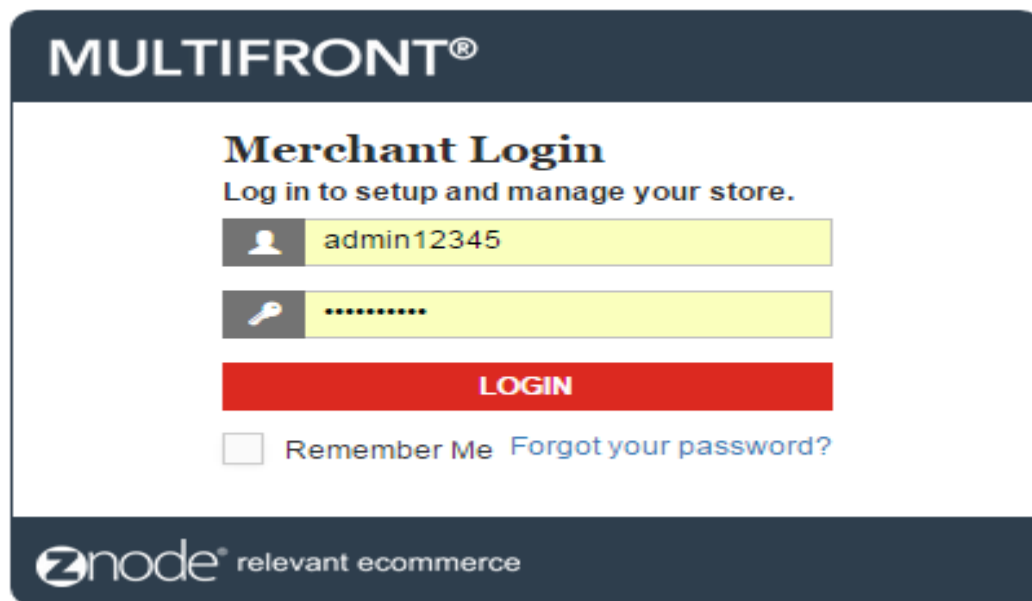
2 LOGIN TO THE MARKETPLACE ADMIN SITE

Users with Administrator access can login to the Marketplace administration website to manage every aspect of the Marketplace:

- Access the following web address in your browser:


Go to the URL **http://www.yourdomain.com/siteadmin** where **www.yourdomain.com** should be replaced with your storefront's domain name. Note that if the website is installed in your local machine the domain name will be "localhost"

- The **Marketplace Management Login** page is displayed.




- Type your administrator user name and password. When the Marketplace is first installed the default user name is "admin" and the password is "admin".
- Click **Login**.
- Upon successful login, the **Dashboard** page is displayed.

Welcome




Setup

Create new stores, and configure shipping, payments and taxes.




Inventory

Manage your products and inventory.




Marketing

Manage promotions and optimize your store's search engine.



Orders

Manage your orders, RMA, service requests, and reviews.



Reports

Generate reports on sales, customers, and other metrics.

Alerts

- 5 products have low inventory.
[Manage Inventory](#)
- 0 Failed login attempts
[View Activity Log](#)

Create and manage multiple storefronts for your business. [Click Here](#).

Download and upload data to your store including inventory. [Click Here](#).

Quick Statistics

\$100002364.80

Total Sales YTD


85

Orders YTD

107

Accounts Created YTD

RUN REPORTS



3 ADVANCED

3.1 Store Administrators

Site Admin page allows you to manage the site admin's account information.

3.1.1 View Store Administrator

To search for and view site admins:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed.
2. On the top menu, click **Store Administrator** under **Advanced**. The **Site Admins** page is displayed listing all site admins in the database.
3. To search for a site admin:
 - **Store Name:** Select a store name from the drop-down list.
 - **Search Account:** Enter a keyword. This can be a partial First Name, Last Name, Company Name, Login Name, Account Number, Contact ID, Phone Number and Email ID.
 - **Select a Profile:** Select the profile from the drop-down list.
 - **Start Date:** Enter the start date in MM/DD/YYYY format OR click the calendar button beside the date box to set the date.
 - **End Date:** Enter the end date in MM/DD/YYYY format OR click the calendar button beside the date box to set the date.
 - Click **Search**. All accounts matching the search criteria will be displayed under **Site Admin List**.
4. Click **Manage** on the site admin to view its details. The **Site Admin Details** page is displayed listing the site admin details.

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Store Administrators

Manage store administrator accounts, roles and permissions.

[+ ADD](#)

Search

First Name

Last Name

Company Name

Login Name

Account Number

Account Id

Phone Number

Email Id

Start Date

End Date

Store Name

Select Profile

SEARCH


CLEAR

[Advanced Search](#) | [Clear](#)

Account Id	Full Name	Phone Number	Email Id	Action	Disable	Delete
11556			shane.robert@gmail.com			

Show 10 Per Page Page 1 / 1

[DOWNLOAD TO EXCEL](#)

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3.1.2 Add Store Admin

To add the store admin:

1. Login the Site Admin and dashboard is display.
2. Select Store admin from the Advance tab, Store admin page is display.
3. Click on the Add New Button and Add Store Admin page is display
4. Following fields need to enter:
 - **User ID:** Enter the valid User id in the User ID fields
 - **Email ID:** Enter the valid Email ID in the email id fields

Click on the **Submit** button, Email is going to the customer Email ID.

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Create Store Administrator

Note: Upon successful creation of an Admin, a temporary password will be emailed to the new user.

Login Information

User ID

Email Address

SUBMIT

CANCEL

3.1.3 Edit Store Admin

To Edit the Customer, click on the manage link from any customer:

1. Login the Site Admin and dashboard is display.
2. Select Store admin from the Advance tab, Store admin page is display.
3. Click on the manage link from any account.
4. General Tab is display with the Edit Account button.
5. Update the following details.

- **Email ID:** Update the valid Email ID in the email id fields
- **Reset Password:** While clicking on the submit button temporary password is send to the Email ID.

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Edit Store Administrator

Note: Upon the edit of an account you are able to submit a request to reset the user's current password.

Login Information

User ID

Shane12

Reset Password

RESET PASSWORD

Email Address

shane.robert@gmail.com

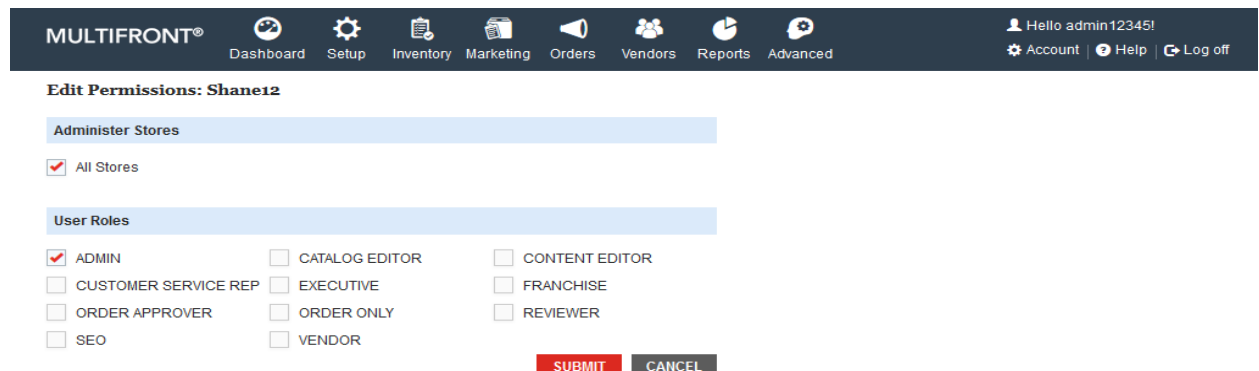
SUBMIT

CANCEL

Permissions:

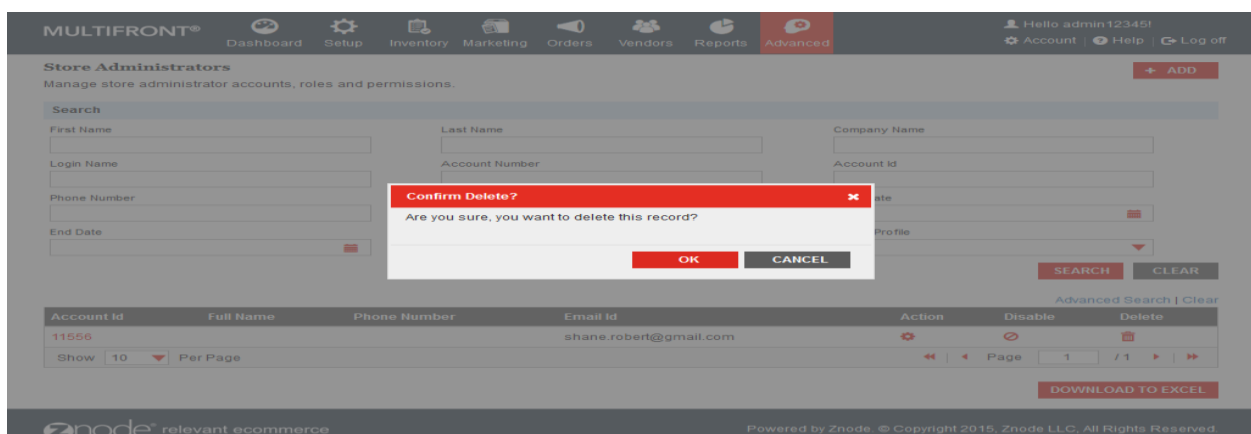
Here Super admin can select the Roles and Permission to the admin. While clicking on the Edit Roles and permission button Edit Permission page is display.

1. Login the Site Admin and dashboard is display.
2. Select Store admin from the Advance tab, Store admin page is display.
3. Click on the manage link from any account.
4. Select Permission tab and click on the Edit Roles and Permission button.
5. Uncheck All Store check box, all other store is display along with the check box.
6. Select Roles from the Select Roles section and click on the submit button.



3.1.4 Delete Store Administrator

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Store Administrators** under **Advance**. The **Store Administrators** page is display.
3. Click on the Delete link of from the store admin link.
4. Confirmation message is display
5. Click on the Delete link, selected store administrator is removed from the list.



3.2 Rotate Key

For enhanced security, you should create a new encryption key instead of using the key that is included out of the box with Marketplace.

To rotate key:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed.
2. On the top menu, click **Rotate Key** under **Advanced**. **Key Rotation - Confirmation Required** page is displayed.
3. Click **Generate**. Message is displayed.

Caution: Generating a new key will make previously encrypted data un-readable (for ex: Merchant Gateway Settings, SMTP Settings, etc). Key generation should only be done for a new storefront and should never be attempted on a storefront running in production.

Key generation will not impact customer or product data.

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Key Rotation - Confirmation Required

Generate a new encryption key for your store

Please confirm if you want to generate a new encryption key for this store. You should create a new encryption key instead of using the key that is shipped out of the box for enhanced security.

CAUTION!

Generating a new key will make previously encrypted data un-readable (for ex: Merchant Gateway Settings, SMTP Settings, etc). Key generation should only be done for a new installation and should never be attempted on a store running in production.

Key generation will not impact customer or product data.

[Back to Advanced page](#)

GENERATE
CANCEL

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3.3 Provider Engine


Add custom business providers to your store. Advanced functionality for experienced developers only.









3.3.1 Promotions

3.3.1.1 View promotion rule types

To view promotion rule types:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine** under **Advanced**. The **Custom .NET Promotion Classes** page is displayed listing all the .NET promotion classes.



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




Provider Engine

Add custom business providers to your store. Advanced functionality for experienced developers only.

Promotions
Shipping
Suppliers
Taxes


[+ ADD](#)

[Advanced Search](#) | [Clear](#)

Id	Class Name	Name	Type	Enabled	Edit	Delete
1	ZnodeCartPromotionPercentOffOrder	Percent Off Order	CART	✓		
2	ZnodeCartPromotionPercentOffProduct	Percent Off Product	CART	✓		
3	ZnodeCartPromotionPercentOffShipping	Percent Off Shipping	CART	✓		
4	ZnodeCartPromotionPercentOffXIfY Purchased	Percent Off X If Y Purchased	CART	✓		
5	ZnodeCartPromotionAmountOffOrder	Amount Off Order	CART	✓		
6	ZnodeCartPromotionAmountOffProduct	Amount Off Product	CART	✓		
7	ZnodeCartPromotionAmountOffShipping	Amount Off Shipping	CART	✓		
8	ZnodeCartPromotionAmountOffXIfY Purchased	Amount Off X If Y Purchased	CART	✓		
9	ZnodePricePromotionAmountOffProduct	Amount Off Displayed Product Price	PRICE	✓		
10	ZnodePricePromotionPercentOffProduct	Percent Off Displayed Product Price	PRICE	✓		

Show Per Page

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3.3.1.2 Add promotion rule types

To add a promotion rule type:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine** under **Advanced**. The **Custom .NET Promotion Classes** page is displayed listing all the .NET promotion classes.
3. Click **Add a New Promotion Type**. The **Configure .NET Promotion Class** page is displayed.
4. Enter the following details:
 - **Available Promotion Types:** Select the type of this class from the drop down list.
 - **Class Name:** Enter the name of this class. Ensure that the Class Name you enter exactly match your class.
 - **Rule Name:** Enter the rule name.
 - **Rule Description:** Enter a description for this rule.
 - **Enable Rule:** Select to enable this rule.
5. Click **Submit**. The **Custom .NET Promotion Classes** page is displayed listing the newly added .NET promotion class.

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Configure Promotion Type

Make a promotion type available to the system. The available promotion types list only shows those that have not been added to the system.

General Information

Available Promotion Types

-- Select Promotion Type --

Class Name *

Name *

Description *

☒ Enable Type

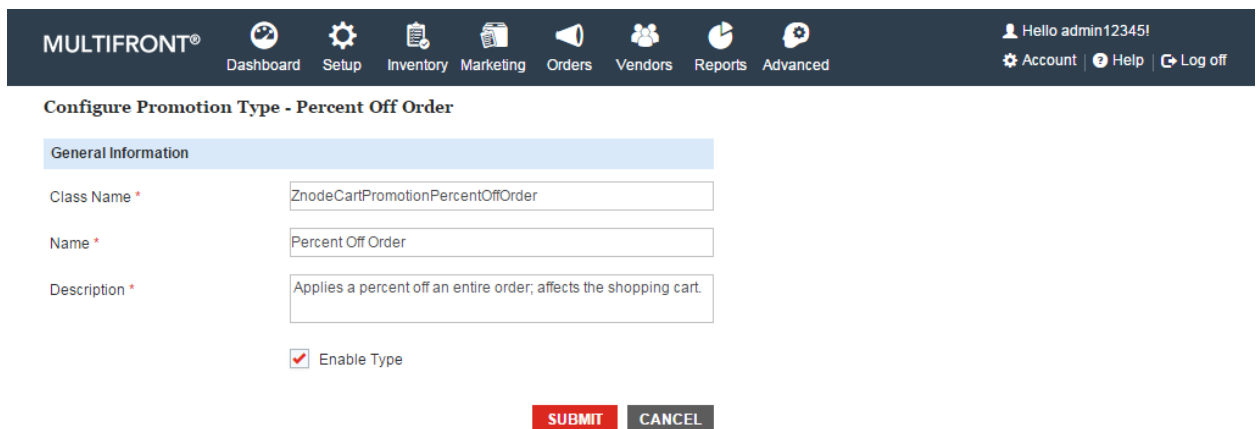
SUBMIT

CANCEL

3.3.1.3 Edit promotion rule types

To edit a promotion rule type:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine** under **Advanced**. The **Custom .NET Promotion Classes** page is displayed listing all the .NET promotion classes.
3. Click **Edit** on the .NET promotion class to edit it. The **Configure .NET Promotion Class** page is displayed.
4. Edit the following details:
 - **Class Type:** Select the type of this class from the drop down list.
 - **Class Name:** Edit the name of this class. Ensure that the Class Name you enter exactly match your class.
 - **Rule Name:** Edit the rule name.
 - **Rule Description:** Edit a description for this rule.
 - **Enable Rule:** Select to enable this rule.
5. Click **Submit**. The **Custom .NET Promotion Classes** page is displayed.



MULTIFRONT® Dashboard Setup Inventory Marketing Orders Vendors Reports Advanced Hello admin12345! Account Help Log off

Configure Promotion Type - Percent Off Order

General Information

Class Name * ZnodeCartPromotionPercentOffOrder

Name * Percent Off Order

Description * Applies a percent off an entire order; affects the shopping cart.

☒ Enable Type

SUBMIT CANCEL

3.3.1.4 Delete promotion rule types

To delete a promotion rule type:

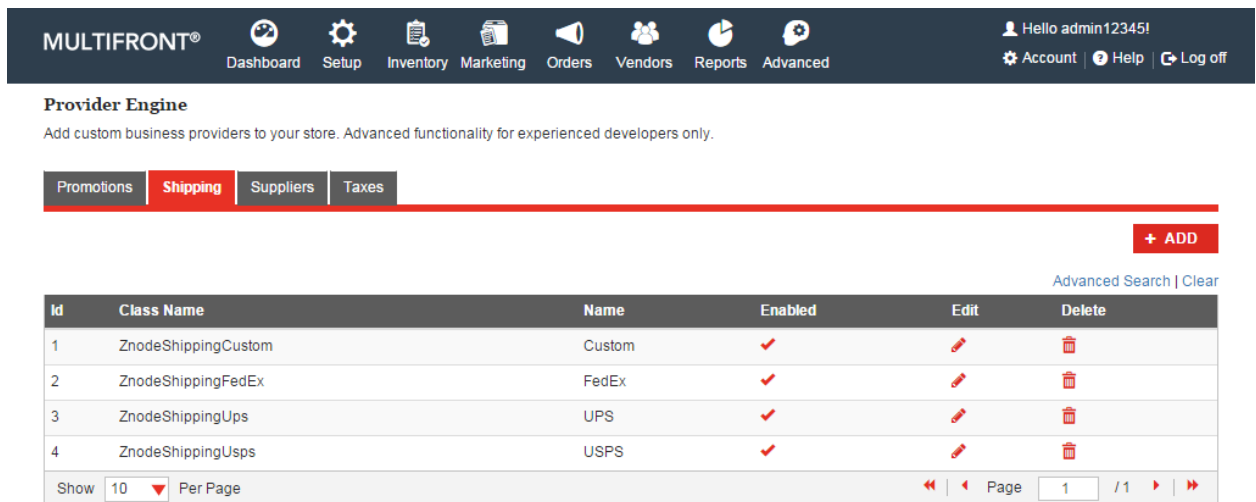
1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine** under **Advanced**. The **Custom .NET Promotion Classes** page is displayed listing all the .NET promotion classes.
3. Click **Delete** on the .NET promotion class to delete it. The **Configure .NET Promotion Class** page is displayed with the deleted promotion rule type removed from the list.

3.3.2 Shipping

3.3.2.1 View shipping rule types

To view shipping rule types:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine > Shipping** under **Advanced**. The **Custom .NET Shipping Classes** page is displayed listing all the .NET shipping classes.



The screenshot shows the Znode Admin Dashboard. At the top, there's a navigation bar with icons for Dashboard, Setup, Inventory, Marketing, Orders, Vendors, Reports, and Advanced. The 'Advanced' section is expanded, showing 'Provider Engine' with sub-links for Promotions, Shipping (highlighted), Suppliers, and Taxes. Below this, there's a table of shipping classes. The table has columns for Id, Class Name, Name, Enabled, Edit, and Delete. There are four rows of shipping classes: ZnodeShippingCustom, ZnodeShippingFedEx, ZnodeShippingUps, and ZnodeShippingUsps. Each row has a checkbox for 'Enabled' and icons for 'Edit' and 'Delete'. At the bottom of the table, there's a pagination bar showing 'Page 1 / 1'.

Id	Class Name	Name	Enabled	Edit	Delete
1	ZnodeShippingCustom	Custom	<input checked="" type="checkbox"/>		
2	ZnodeShippingFedEx	FedEx	<input checked="" type="checkbox"/>		
3	ZnodeShippingUps	UPS	<input checked="" type="checkbox"/>		
4	ZnodeShippingUsps	USPS	<input checked="" type="checkbox"/>		

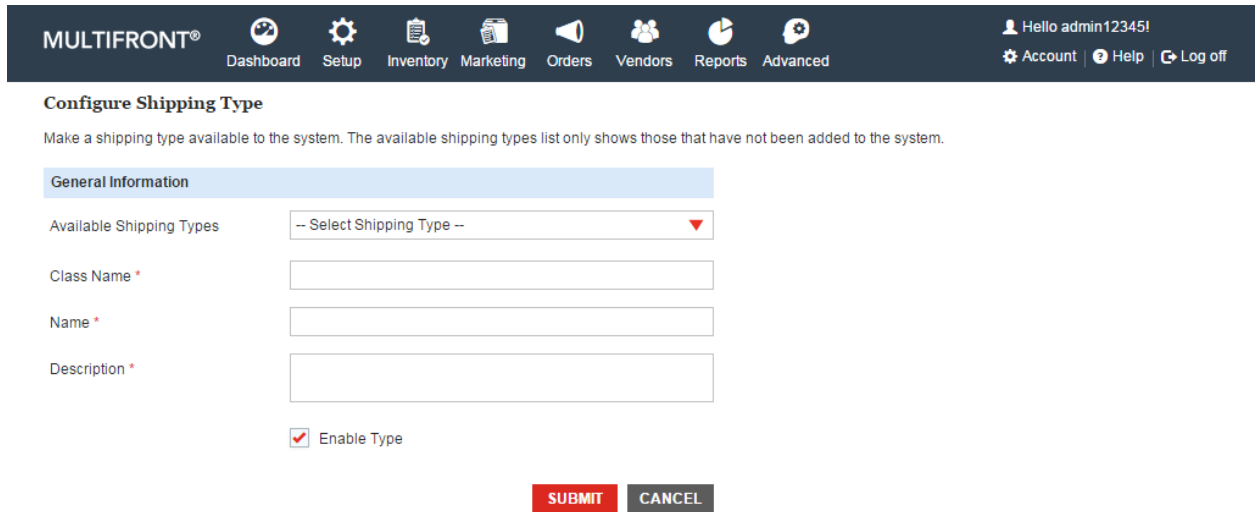
3.3.2.2 Add shipping rule types

To add a shipping rule type:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine > Shipping** under **Advanced**. The **Custom .NET Shipping Classes** page is displayed listing all the .NET shipping classes.
3. Click **Add New Shipping Type**. The **Configure .NET Shipping Class** page is displayed.
4. Enter the following details:
 - **Class Name**: Enter the name of this class. Ensure that the Class Name you enter exactly match your class.
 - **Rule Name**: Enter the rule name.
 - **Rule Description**: Enter a description for this rule.
 - **Enable Rule**: Select to enable this rule.

5. Click **Submit**. The **Custom .NET Shipping Classes** page is displayed listing the newly

added .NET shipping class.



3.3.2.3 Edit shipping rule types

To edit a shipping rule type:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine > Shipping** under **Advanced**. The **Custom .NET Shipping Classes** page is displayed listing all the .NET shipping classes.
3. Click **Edit** on the .NET shipping class to edit it. The **Configure .NET Shipping Class** page is displayed.
4. Edit the following details:
 - **Class Name:** Edit the name of this class. Ensure that the Class Name you enter exactly match your class.
 - **Rule Name:** Edit the rule name.
 - **Rule Description:** Edit a description for this rule.
 - **Enable Rule:** Select to enable this rule.
5. Click **Submit**. The **Custom .NET Shipping Classes** page is displayed.

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Configure Shipping Type -Custom

General Information

Class Name *
ZnodeShippingCustom

Name *
Custom

Description *
Calculates custom shipping rates.

☒ Enable Type

SUBMIT
CANCEL

3.3.2.4 Delete shipping rule types

To delete a shipping rule type:

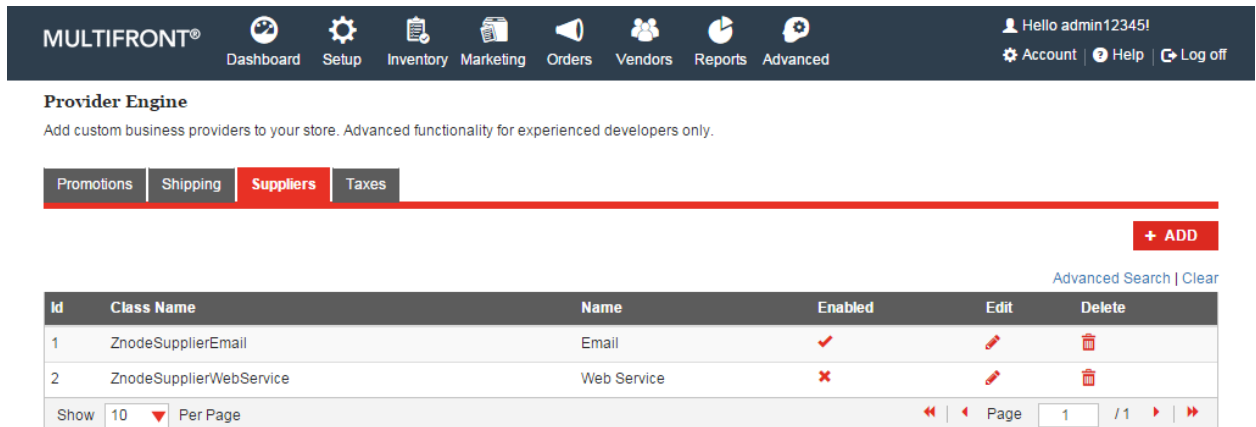
1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine > Shipping** under **Advanced**. The **Custom .NET Shipping Classes** page is displayed listing all the .NET shipping classes.
3. Click **Delete** on the .NET shipping class to delete it. The **Configure .NET Promotion Class** page is displayed with the deleted shipping rule type removed from the list.

3.3.3 Suppliers

3.3.3.1 View supplier rule types

To view supplier rule types:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine > Suppliers** under **Advanced**. The **Custom .NET Supplier Classes** page is displayed listing all the .NET supplier classes.



The screenshot shows the Znode Advanced User Interface. At the top, there's a navigation bar with the MULTIFRONT logo and various icons for Dashboard, Setup, Inventory, Marketing, Orders, Vendors, Reports, and Advanced. The user is logged in as 'Hello admin12345!'. Below the navigation bar, the 'Provider Engine' section is active, showing a sub-menu with 'Promotions', 'Shipping', 'Suppliers', and 'Taxes'. The 'Suppliers' tab is selected, displaying a table of supplier rule types. The table has columns for Id, Class Name, Name, Enabled, Edit, and Delete. There are two entries: 'ZnodeSupplierEmail' (Email) which is enabled, and 'ZnodeSupplierWebService' (Web Service) which is disabled. At the bottom of the table, there's a pagination control showing 'Page 1 / 1'.

Id	Class Name	Name	Enabled	Edit	Delete
1	ZnodeSupplierEmail	Email	✓		
2	ZnodeSupplierWebService	Web Service	✗		

3.3.3.2 Add supplier rule types

To add a supplier rule type:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine > Suppliers** under **Advanced**. The **Custom .NET Supplier Classes** page is displayed listing all the .NET supplier classes.
3. Click **Add a New Supplier Rule Type**. The **Configure .NET Supplier Class** page is displayed.
4. Enter the following details:
 - **Class Name:** Enter the name of this class. Ensure that the Class Name you enter exactly match your class.
 - **Rule Name:** Enter the rule name.
 - **Rule Description:** Enter a description for this rule.
 - **Enable Rule:** Select to enable this rule.
5. Click **Submit**. The **Custom .NET Supplier Classes** page is displayed listing the newly added .NET supplier class.

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Configure Supplier Type

Make a supplier type available to the system. The available supplier types list only shows those that have not been added to the system.

General Information

Available Supplier Types

-- Select Supplier Type --

Class Name *

Name *

Description *

☒ Enable Type

SUBMIT

CANCEL

3.3.3.3 Edit supplier rule types

To edit a supplier rule type:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine > Suppliers** under **Advanced**. The **Custom .NET Supplier Classes** page is displayed listing all the .NET supplier classes.
3. Click **Edit** on the .NET supplier class to edit it. The **Configure .NET Supplier Class** page is displayed.
4. Edit the following details:
 - **Class Name:** Edit the name of this class. Ensure that the Class Name you enter exactly match your class.
 - **Rule Name:** Edit the rule name.
 - **Rule Description:** Edit a description for this rule.
 - **Enable Rule:** Select to enable this rule.
5. Click **Submit**. The **Custom .NET Supplier Classes** page is displayed.

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Configure Supplier Type - Email

General Information

Class Name *

ZnodeSupplierEmail

Name *

Email

Description *

Sends an email receipt of the order to the supplier.

☒ Enable Type

SUBMIT

CANCEL

3.3.3.4 Delete supplier rule types

To delete a supplier rule type:

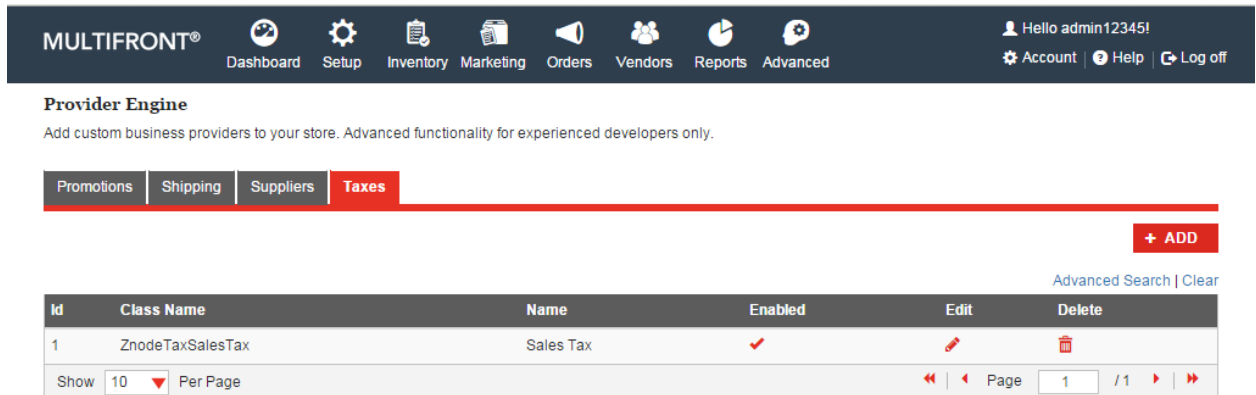
1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine > Suppliers** under **Advanced**. The **Custom .NET Supplier Classes** page is displayed listing all the .NET supplier classes.
3. Click **Delete** on the .NET supplier class to delete it. The **Configure .NET Promotion Class** page is displayed with the deleted supplier rule type removed from the list.

3.3.4 Taxes

3.3.4.1 View tax rule types

To view tax rule types:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine > Taxes** under **Advanced**. The **Custom .NET Tax Classes** page is displayed listing all the .NET tax classes.



The screenshot shows the MULTIFRONT® dashboard. The top navigation bar includes links for Dashboard, Setup, Inventory, Marketing, Orders, Vendors, Reports, and Advanced. The user is logged in as 'Hello admin12345!'. The 'Provider Engine' section is active, showing a list of tabs: Promotions, Shipping, Suppliers, and Taxes. The 'Taxes' tab is selected, displaying a table of tax classes. The table has columns for Id, Class Name, Name, Enabled, Edit, and Delete. One tax class is listed: 'ZnodeTaxSalesTax' with the name 'Sales Tax' and is enabled. There is a '+ ADD' button and an 'Advanced Search | Clear' link. The table also shows pagination: 'Show 10 Per Page' and 'Page 1 / 1'.

Id	Class Name	Name	Enabled	Edit	Delete
1	ZnodeTaxSalesTax	Sales Tax	✓		

3.3.4.2 Add tax rule types

To add a tax rule type:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine > Taxes** under **Advanced**. The **Custom .NET Tax Classes** page is displayed listing all the .NET tax classes.
3. Click **Add a New Tax Rule Type**. The **Configure .NET Tax Class** page is displayed.
4. Enter the following details:
 - **Class Name**: Enter the name of this class. Ensure that the Class Name you enter exactly match your class.
 - **Rule Name**: Enter the rule name.
 - **Rule Description**: Enter a description for this rule.
 - **Enable Rule**: Select to enable this rule.
5. Click **Submit**. The **Custom .NET Tax Classes** page is displayed listing the newly added .NET tax class.

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Configure Tax Type

Make a tax type available to the system. The available tax types list only shows those that have not been added to the system.

General Information

Available Tax Types

-- Select Tax Type --

Class Name *

Name *

Description *

☒ Enable Type

SUBMIT

CANCEL

3.3.4.3 Edit tax rule types

To edit a tax rule type:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine > Taxes** under **Advanced**. The **Custom .NET Tax Classes** page is displayed listing all the .NET tax classes.
3. Click **Edit** on the .NET tax class to edit it. The **Configure .NET Tax Class** page is displayed.
4. Edit the following details:
 - **Class Name:** Edit the name of this class. Ensure that the Class Name you enter exactly match your class.
 - **Rule Name:** Edit the rule name.
 - **Rule Description:** Edit the description for this rule.
 - **Enable Rule:** Select to enable this rule.
5. Click **Submit**. The **Custom .NET Tax Classes** page is displayed.

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Configure Tax Type - Sales Tax

General Information

Class Name *

ZnodeTaxSalesTax

Name *

Sales Tax

Description *

Applies sales tax to the shopping cart.

☒ Enable Type

SUBMIT

CANCEL

3.3.4.4 Delete tax rule types

To delete a tax rule type:

1. [Login to the Marketplace administration website](#). The **Dashboard** page is displayed
2. On the top menu, click **Provider Engine > Taxes** under **Advanced**. The **Custom .NET Tax Classes** page is displayed listing all the .NET tax classes.
3. Click **Delete** on the .NET tax class to delete it. The **Custom .NET Tax Classes** page is displayed with the deleted tax rule type removed from the list.

3.4 Manage Search Index

Create or rebuild the Lucene search engine index. This function is for advance administrator only.

- **Create Index:** Here can delete the current index file and rebuild a new index file
- **Enable/Disable Trigger:** Enable or disable search index triggers which will update the index file via the service. Examples are changes to a category, product or facet field.
- **Enable/Disable Win service:** Enable or disable the service that picks up trigger updates and then sends the updates to the index file.

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Manage Search Index

Please note these functions are for advanced administrators only.

Create Search Index

Delete the current index file and rebuild a new index file.

CREATE INDEX

Enable/Disable Triggers

Enable or disable search index triggers which will update the index file via the service. Examples are changes to a category, product or facet field.

ENABLE TRIGGERS

Enable/Disable Winservice

Enable or disable the service that picks up trigger updates and then sends the updates to the index file.

DISABLE WINSERVICE

[Advanced Search](#) | [Clear](#)

Id	Source Id	Source Type	Source Transition Type	Transition Date Time	Is Duplicate	Column Change	Modified By	View
1658	219	CategoryFacet	INSERT	4/25/2015 6:03:31 PM	False	FacetGroupCategory		
1657	85	CategoryFacet	INSERT	4/25/2015 6:03:31 PM	False	FacetGroupCategory		
1656	148	CategoryFacet	INSERT	4/25/2015 6:03:31 PM	False	FacetGroupCategory		
1655	96	CategoryFacet	INSERT	4/25/2015 6:03:31 PM	False	FacetGroupCategory		
1654	94	CategoryFacet	INSERT	4/25/2015 6:03:31 PM	False	FacetGroupCategory		
1653	219	CategoryFacet	DELETE	4/25/2015 6:03:31 PM	False	FacetGroupCategory		
1652	148	CategoryFacet	DELETE	4/25/2015 6:03:31 PM	False	FacetGroupCategory		
1651	96	CategoryFacet	DELETE	4/25/2015 6:03:31 PM	False	FacetGroupCategory		
1650	94	CategoryFacet	DELETE	4/25/2015 6:03:31 PM	False	FacetGroupCategory		
1649	85	CategoryFacet	DELETE	4/25/2015 6:03:31 PM	False	FacetGroupCategory		

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