

relevant ecommerce™

# ZNODE MARKETPLACE 8.1.2 USER MANUAL

April 2016





# **Znode 8.1.2 Advanced Manual**

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# **TABLE OF CONTENTS**

1 Revision History	1
2 Login to the Marketplace Admin Site	5
3 Advanced	7
3.1 Store Administrator	
3.1.1 View Store Administrator	7
3.1.2 Add Store Admin	
3.1.3 Edit Store Administrator	9
3.1.4 Delete Store Admin	10
3.2 Rotate Key	11
3.3 Provider Engine	12
3.3.1 Promotions	12
3.3.2 Shipping	15
3.3.3 Suppliers	18
3.3.4 Taxes	21
3.4 Manage Search Index	24



## 1 REVISION HISTORY

Section	Date	Change Made
	5/6/2015	First Draft
	4/4/2016	Second Draft



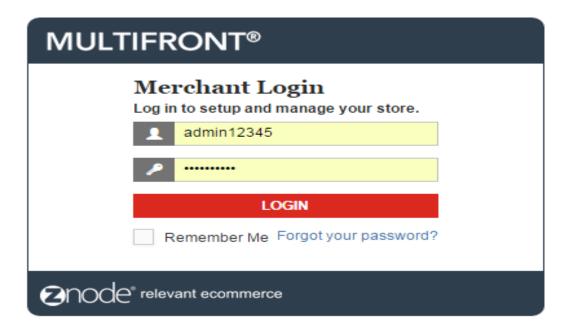
### 2 LOGIN TO THE MARKETPLACE ADMIN SITE

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"

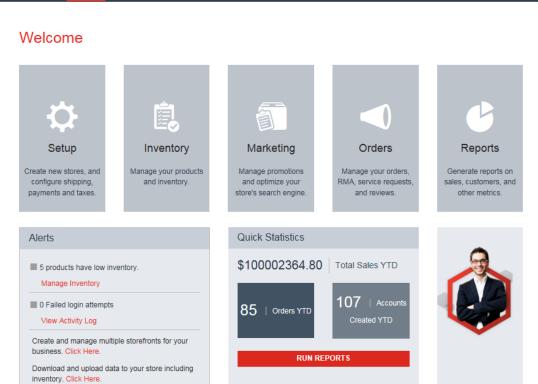
• The Marketplace Management Login page is displayed.



- 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.









### 3 ADVANCED

#### 3.1 Store Administrators

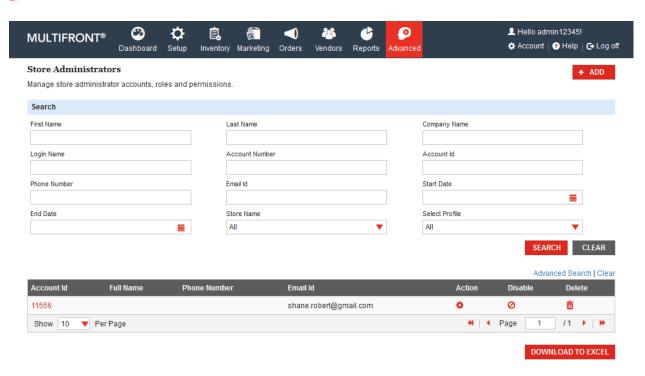
**Site Admin** page allows you to manage the site admin's account information.

#### 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.



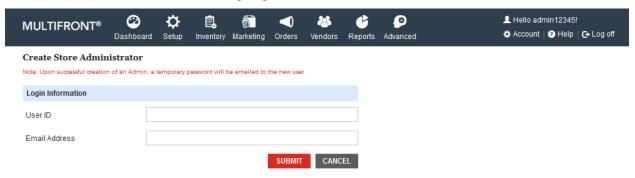


#### 3.1.2 Add Store Admin

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.

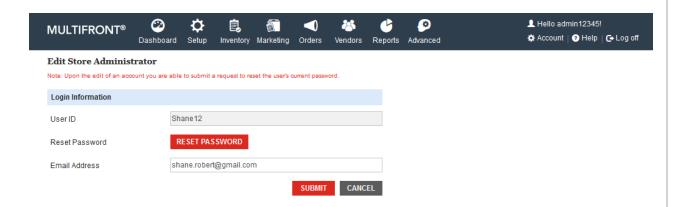




#### 3.1.3 Edit Store Admin

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.

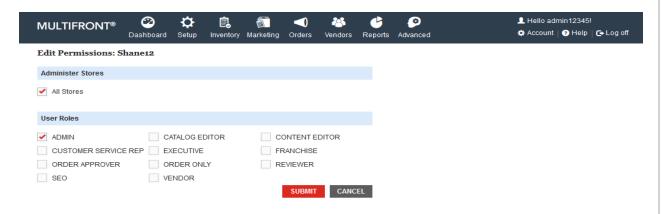


#### **Permissions:**

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.

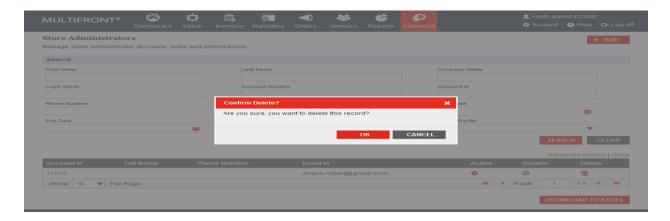
- 1. Login the Site Admin and dashboard is display.
- 2. Select Store admin from the Advance tab, Store admin page is display.
- 3 .Click on the manage link from any account.
- 4 .Select Permission tab and click on the Edit Roles and Permission button.
- 5. Uncheck All Store check box, all other store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

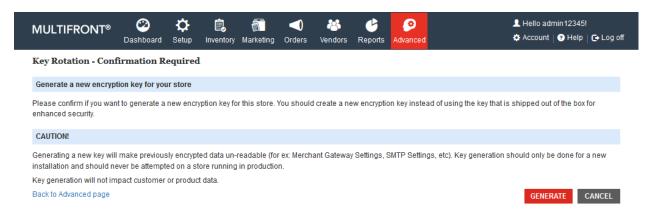
To rotate key:

- 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.



### 3.3 Provider Engine

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

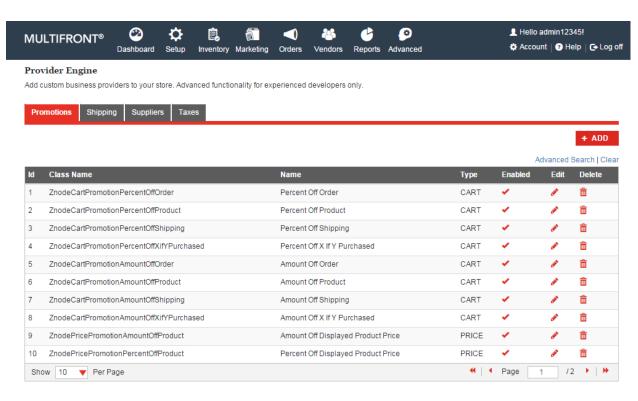
### 3.3.1 **Promotions**

### 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.





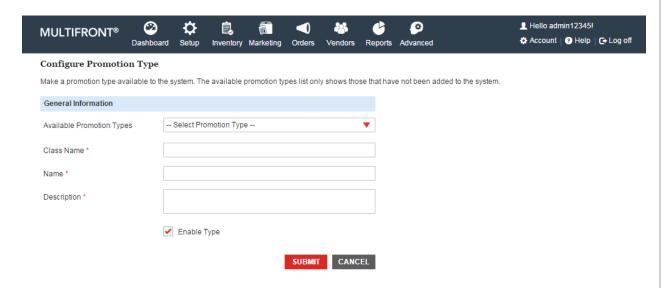
### 3.3.1.2 Add promotion rule types

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.
- 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.



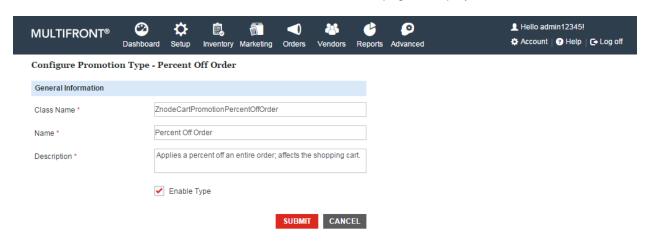
### 3.3.1.3 Edit promotion rule types

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.
- 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.



### 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
- 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.

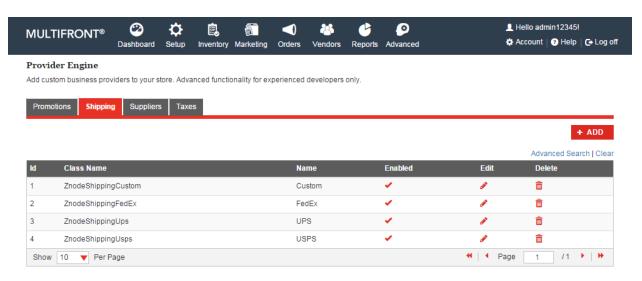
### 3.3.2 **Shipping**

### 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
- On the top menu, click Provider Engine > Shipping under Advanced. The Custom .NET Shipping Classes page is displayed listing all the .NET shipping classes.



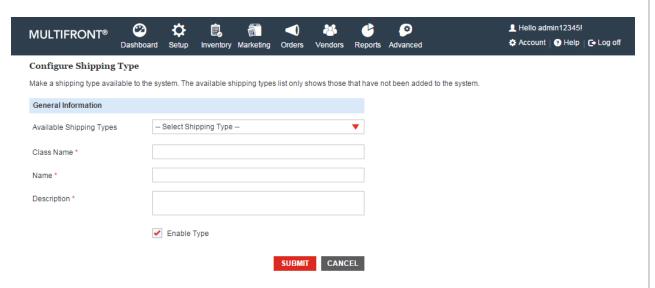


### 3.3.2.2 Add shipping rule types

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.
- 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.
- Click Submit. The Custom .NET Shipping Classes page is displayed listing the newly added .NET shipping class.



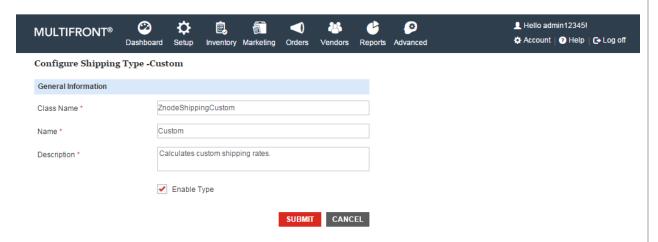


### 3.3.2.3 Edit shipping rule types

To edit a shipping rule type:

- 1. Login to the Marketplace administration website. The Dashboard page is displayed
- 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.





### 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.

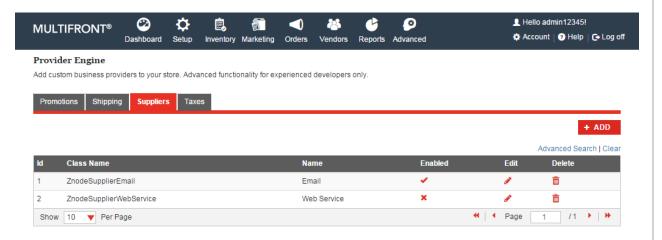


### 3.3.3 Suppliers

#### 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.

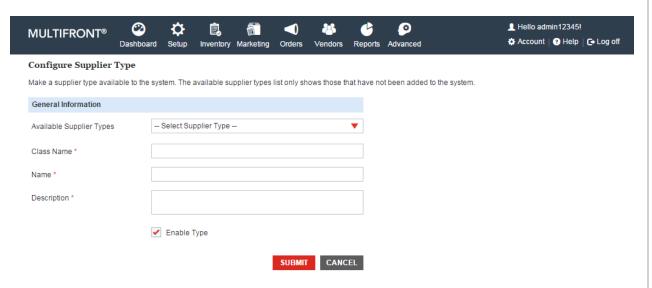


### 3.3.3.2 Add supplier rule types

To add a supplier rule type:

- 1. Login to the Marketplace administration website. The Dashboard page is displayed
- On the top menu, click Provider Engine > Suppliers under Advanced. The Custom .NET Supplier Classes page is displayed listing all the .NET supplier classes.
- 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.
- Click Submit. The Custom .NET Supplier Classes page is displayed listing the newly added .NET supplier class.



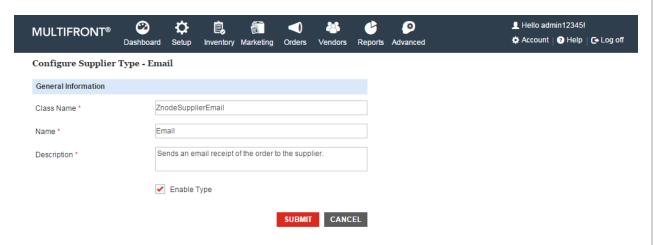


### 3.3.3.3 Edit supplier rule types

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.





### 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.

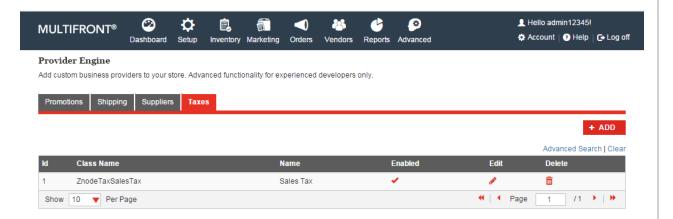


### 3.3.4 **Taxes**

### 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
- On the top menu, click Provider Engine > Taxes under Advanced. The Custom .NET Tax Classes page is displayed listing all the .NET tax classes.

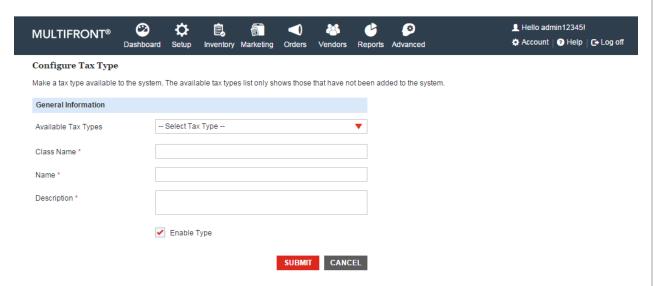


### 3.3.4.2 Add tax rule types

To add a tax rule type:

- 1. Login to the Marketplace administration website. The Dashboard page is displayed
- 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.
- Click Submit. The Custom .NET Tax Classes page is displayed listing the newly added .NET tax class.



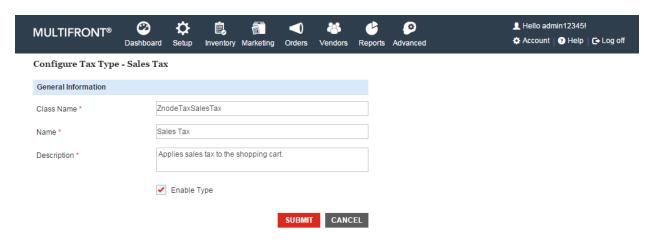


### 3.3.4.3 Edit tax rule types

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.





### 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.

