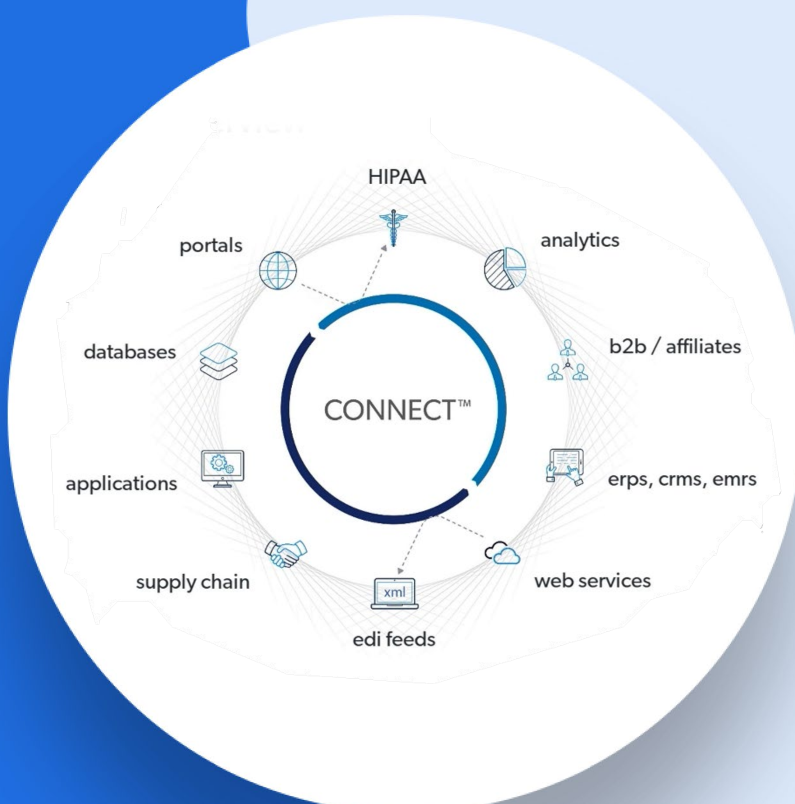
CLARITY

Clarity Integrated eCommerce Framework™ Feature Documentation



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Overview

We are introducing the Integrated Clarity eCommerce Framework™ (CEF). We have created the CEF solution to integrate our eCommerce portal with your ERP, CRM, or other software, via our Connect Integration platform. This document will walk you through everything you get with Integrated CEF, from the out-of-the-box features to the multitude of ways to customize the platform/integration. We will also summarize CEF features, security, and hosting options.

Thank you, and welcome to Integrated CEF™!

CEF Components

Our CEF system consists of two portals: the Storefront and Admin. The Storefront is where the end users navigate the Catalog to view and purchase products. Customer Service Representatives and Store Administrators use the Admin to view and manage the backend components, including Products, Accounts, Users, Orders, Invoices, and more.

What do you get with Out of the Box CEF?

The Out of the Box (OOTB) storefront and admin portals have several features designed to give your users a smooth experience from the start of the implementation. Within the Phase II portion of the project, customizations are made to the OOTB solution to meet the requirements of your organization.

CEF Storefront Portal

Account Registration

Guest Users can create an eCommerce Account by completing the Registration Form. Completing all registration stages generates a new Account, associates a new User with their Account, and grants access to additional catalog features.

Catalog

Customers can browse products in a filterable catalog that displays product images, names, specifications, and more. In addition, the Catalog includes different views, sorting options, and page sizes to make finding products easier for your customers.

Product Details Page

The Product Details Page displays all additional information your customers want to see on the site, including bulleted specs, files, other images, and more.

Shopping Cart

Customers can add products to a Shopping Cart before proceeding to Checkout and completing their Order. The Shopping Cart Page includes a dynamic products grid that shows the Product's image, name, price, SKU, and the quantity selected. The Shopping Cart also supports backorder notifications, applied discounts, and order totals.

Quotes

Like the Shopping Cart, the Quote Cart stores products for the Customer to request custom pricing on items at specific quantities. Quotes submitted are sent to the site Administrator for Review via the Admin Portal. The Site Administrator can review, modify, and either process or deny the quote. Once processed, the Customer can navigate to their Quote Details Page to either Approve (Convert to an Order), Reject (Send back to the Administrator), or Cancel (Void) the Quote Request.

Checkout

The Checkout Module includes sections for Checkout Method (Guest vs. Registered), Shipping Information, Shipping Rate Calculations, Billing Information, Payment Processing, and Order Confirmation. Each module of Checkout works together to build/store all Order Information and can be customized depending on your specific needs and typical Order Entry Process.

NOTE: ***Checkout Customizations vary depending on your business logic and the complexity of your requirements.***

Profile Management

The My Profile Tab of the User Dashboard is where your customers can manage their User Information. This information is associated with the Individual that is logging into the system.

Account Management

The Account Profile Tab of the User Dashboard is where your customers can manage their Account Information. The Account level information stores the Customer's company information, including Address Book and User data.

Address Book

The Address Book Tab of the User Dashboard is where your Customers will manage their Billing and Shipping Addresses. Address Book Entries are shared across all Users under the Account and dynamically populate into the Payment Sections of both Checkout and the Invoice Details Page.

Wallet

The Wallet Tab of the User Dashboard is where your Customers will manage their Credit Card Entries. Once cards are added to the wallet, the wallet dynamically populates into the Payment Sections of the Checkout and the Invoice Details Page.

Wish List

When enabled, Customers can add Products to their Wish List when browsing the Catalog. Customers can then navigate to the Wish List Tab of the User Dashboard to manage the products they have added to the list.

NOTE: The Wish List is a list of items the User can manage via their Dashboard (Same as the Favorites List).

Favorites List

When enabled, Customers can add Products to their Favorites List when browsing the Catalog. Customers can then navigate to the Favorites List Tab of the User Dashboard to manage the products they have added to the list.

NOTE: The Favorites List lists items the User can manage via their Dashboard (Same as the Wish List).

Shopping Lists

The Shopping Lists Feature allows the Customer to create multiple named lists of products. When viewing the Product Details Page, the Customer can add the Product to an existing Shopping List for viewing/purchasing later. The Customer can create a new list of items by clicking the "Create and Add Another" Button and specifying the name of the Shopping List. If no Shopping Lists exist, the system will automatically prompt the Customer to name their first list. Customers can Create, Read, Update, and Delete their Shopping Lists via the User Dashboard.

NOTE: The Shopping List is a series of lists that can include different items that the User can manage via their Dashboard.

Discounts

A store admin can use the Discounts Module to create discounted pricing on Orders and Products and set up "Buy X Get Y" logic. Discounts are associated with Products, Accounts, Account Types, Product Types, Categories, Users, and Roles by default.

In-Stock Alerts

Out-of-Stock products or On Backorder will include a Bell Icon/In-Stock Alert Button in the Catalog that Registered Users can click to add the Product to the In-Stock Alerts List. Once clicked, the In-Stock Alert Button will display a modal and prompt the User to specify how many they wish to purchase. When the Item Inventory exceeds the User's specified purchase quantity, an automated email will be sent to the Customer notifying them that the Product that was Out-of-Stock/On Backorder is now available to purchase in their desired quantity. Users that have added Products to the In-Stock Alerts List can navigate to their Dashboard to remove products from the list or add them to the cart when available.

CEF Admin Portal

Orders

Administers can utilize the Sales Orders Module to view/manage all orders placed through the system.

Invoices

Administrators can utilize the Invoices Module to view/manage all Invoices that have been either created within the CEF or synced into CEF from an external source (ERP).

Quotes

Administrators can utilize the Quotes Module to view/manage all Quotes that Customers have submitted via the Storefront Marketplace.

Sales Groups

Sales groups maintain a Sales Order relationship when a split occurs during Checkout when selecting multiple shipping addresses for a single Order. When specifying multiple shipment addresses during Checkout, CEF automatically generates a Sub-Order ID for every shipment address. Sales Group ID relates the Sales Order to the associated Master Order.

Products

The Products Module maintains product records, including SEO meta tags, images, product association, etc. The data in each entry generates the product details pages.

Categories

The Administrator can use the Category Module to view and manage the Categories displayed within the Storefront Mega Menu and Filters Section.

Shipping Packages

Shipping Packages contain the dimensions and information related to a product regarding the package it is shipped in. The shipping details allow for more accurate shipping information and estimates when retrieved using this information.

Accounts

Accounts represent companies and organizations. Created Users are associated with an Account, and multiple users can be associated with a single account.

Users

Administrators can create and modify Users in the system by navigating the Manage Users Page. Users are Contacts that include logins to the site or Storefront. The system requires each User to be associated with an account. Accounts can have many associated Users, but Users can only be associated with one Account. The information on the User's My Profile page of the User Dashboard maps to the User record within the Admin Portal.

Roles

The Roles module specifies permissions to specific user roles. Roles can turn off permissions to features in the Admin and Storefront. Ensure you understand the changes you are making, as they can break user functionality.

Discounts

The Discount Module allows Administrators to create/manage discounts and discount associations based on Products, Accounts, Categories, Users, Roles, etc.

Reviews

Administrators can utilize the Reviews Module to view, modify, approve, deactivate, and delete Product Reviews in the system.

Site Maintenance

The Site Maintenance section purges caches on the site, manages app settings, indexes products, manages sitemaps, accesses the help center, and views system logs.

Scheduled Tasks

The Scheduled Tasks section of the Portal monitors the status of each scheduled job that runs inside the system.

API Reference

This section of the Portal references CEF's API endpoint documentation and may be needed if attempting to communicate with CEF from a different system via an API endpoint.

Email Queues

Administrators can utilize the Email Queues Module to view/manage all queued emails from the system.

Clarity Connect Terms

The Hangfire Dashboard

A third-party library that allows for a User Interface to trigger scheduled jobs.

SQL Database

Clarity Connect™ sits on top of a SQL Database used to log events and cache data if a connection is offline.

Redis Queue

Responsible for queueing and retrying your integrations when a system is offline, which gives your team a chance to mitigate the issue, re-queue the incomplete integrations, and ensure the delivery of your data.

Workflow Engine

Responsible for initiating Integration "jobs" that synchronize data between two or more systems.

Scheduling Engine

Utilizes CRON strings to perform reoccurring, scheduled tasks and allows for the ability to quickly retry individual jobs in the event of failure, or view logs

Batches

A collection of jobs that are executed asynchronously to organize and handle individual jobs failing.

Common Model Field Mappings

The Common Model is a list of fields covering the most common entities typically shared between eCommerce Websites, ERPs, CRMs, etc. (e.g., Accounts, Orders, Addresses, etc.) Once a System is mapped to the Common Model Schema, the data can be integrated with any other system within it, assuming both systems support the entity you wish to integrate.

Swagger UI

The swagger portion of Clarity Connect™ is accessible through the swagger endpoint. It exposes the web controller behind Clarity Connect™ to provide a customizable interface that we can utilize to send API calls to trigger background jobs. In addition, the interface can enqueue background jobs in the actual Clarity Connect™ project itself. Connect can hit these API calls from Postman, or users can click on them and enter their details.

What Configurations are available?

CEF Configurations

Multi-Warehouse Inventory (PILS)

The Warehouses Module within CEF allows the Administrator to create and associate multiple Warehouses and Inventory Quantities to a single Product. The Header Navigation Drop Down Menu navigates to the Manage Warehouses Page. The Warehouses CTA is under the Inventory Section of the Header Navigation Drop-Down Menu. Here, the Administrator can utilize the Sections Configuration Tab of the Warehouse Editor Page to manage the Warehouse's Sections. Warehouse Sections can each contain a separate Inventory Value for a Product.

Price Points (MTP/CSP)

The Price Points Engine controls Product Pricing in the Catalog, allowing the Administrator to create a price tier (type). Each Price Tier includes an override price (or discount) that the Customer will receive when purchasing specific quantities of the Product. (i.e., Customer pays $10 for 1-10 units, $9 for 11-100, and $8 for 101-999999999.)

NOTE: Price Points are mutually exclusive of Price Rules. (Providers = Flat, Tiered, and Price Rules). The site can only use 1 Pricing Provider at a time. A Price Point's Min/Max should NOT ever overlap another Price Point's Min/Max Range.

Subscriptions

Subscriptions, once configured, automatically generate orders and process credit card payments using specific parameters. (e.g., Charge $100/mo. for 12 Months)

NOTE: The time it takes to Implement Subscriptions varies depending on your business logic and the complexity of your requirements.

Memberships

Memberships are typically paired with Subscriptions and often include specific benefits depending on which Membership Level is applied to the associated User.

NOTE: The time it takes to Implement Memberships varies depending on your business logic and the complexity of your requirements.

Appointments/Scheduling

The Appointments Module allows Customers to schedule time slots on a calendar.

NOTE: The time it takes to Implement Subscriptions varies depending on your business logic, the complexity of your requirements, and the context in which appointment will be applied (e.g., In-Store Pickup vs. Telehealth vs. Delivery Dates, etc.)

Multi-Factor Authentication (MFA)

Upon logging in, CEF can generate a randomized code that the User must provide to complete their login. The code is sent to the Customer by either Email or Text/SMS.

NOTE: Text/SMS requires an SMS Provider to send the actual text/SMS.

Configurable Attributes

Attributes are defined as dependent or non-dependent. For example, you can adjust Attribute Settings to be filtered, display on the product details page, display as tabs, allow HTML, and more. Attributes are also not specific to just products but virtually any entity in the system, such as Users or Accounts.

What Customizations are available?

CEF Customizations

Account Balances / Credit Limits

We can customize CEF to allow for Credits on accounts. These can be created/managed from the Admin Portal and utilized by users to make payments against outstanding invoice balances.

Registration Workflows

We can customize the OOB registration process to your desired level to include sections, fields, etc., that gather all/only the data you need on user registration.

Contact Form(s)

Custom contact forms are built to gather all the necessary user information you need right from initial contact.

Customizable Attributes

Attributes can store any custom information that is not a part of an Entity's Schema. Typically, Attributes are used for Custom Development, so check with your Development Team if your Attributes need to be incorporated into any Custom Business Logic.

Connect Customizations

Custom Entities

If any of the entities (records) you need are not part of the Common Model and an endpoint is available for accessing said records. Clarity can build a new Endpoint Connector to access any additional data points your system may expose. The time it takes to create a new Endpoint Connector varies depending on the system, connectivity requirements, and complexities.

Custom Workflows

Clarity Connect™ can manipulate data and perform various tasks when syncing data between your systems. The Common Model includes simple workflows with basic GET and POST requests. In addition, Clarity can build custom workflows and tasks depending on your specific use cases, logic, and business requirements. The time it takes to build a custom workflow varies depending on the amount of data manipulation needed, the complexity of your business logic, and the number of tasks it takes to complete the entire workflow.

Custom Mappings

During Discovery, Clarity will identify whether the Common Model includes all fields your business needs. If not, Clarity can add additional mappings to the system based on your business needs.

What are my Optional Upgrades?

CORS (Cross-Origin Resource Sharing)

CORS is an optional upgrade that allows the eCommerce Framework to be implemented in a headless configuration and embedded on top of an existing site.

Multi-Currency Module

Multi-currency for international payment processing (includes currency conversions and translations).

Multi-Lingual module

Multi-lingual for international languages (includes menu, navigation translations).

NOTE: The module does NOT include client products or content.

AI/Machine Learning Module

The custom logic module is used to record user behavior (i.e., a visitor views a category multiple times, serves up a coupon for that category, etc.).

HIPAA Compliance

When Clarity Connect™ is integrating any PHI, the platform will cache identifying information by default if a system connection goes offline (via the Redis Queue). In these scenarios, we would either deactivate the cache (not recommended) or include our Clarity HIPAA Module that can secure any PHI that passes through the platform.

Persistent Data (Data Storage)

Clarity Connect™ is built on a SQL database for logging and caching data during Integrations. Once configured, the database will persist any/all data that passes through the system for Storage and Backups.

NOTE: Storing data may require a server with a larger amount of disk space.

Custom Reporting

If you are persisting data within Clarity Connect™, a Reporting Engine (such as PowerBI, Tableau, etc.) can be connected directly to the SQL Database to generate custom reports.

What are my Hosting Options?

Clarity Hosted

Clarity offers both a secure hosted solution, as well as our own tokenization service for those projects that require an additional level of security.

Client Hosted

May of Clarity's larger clients have data centers/servers in their own On-Premises Environment. Because of this, Clarity can install and deploy Clarity eCommerce™ on a Client-Hosted Environment.

Provider Hosted

Depending on your industry, there are hosting environments specifically suited to your needs. For example, Amazon AWS works better for FINRA, while Azure is more suited for HIPAA. Clarity may recommend a hosting provider for your solution.