Available Features List

Check out the blue 'Handy Tips' table to see how you can use the Available Feature List below to easily find the information you're looking for:

New to Commerce Vision BPD (Best Practice Design) platform and need an overview?	Click on the table filter and select '**Business Function = BPD Structure**' to view all of the Articles that explain the make-up of our platform.	
Trying to find a keyword?	**CTRL+F (or Command+F on the Mac)** to bring up the search bar that searches this page. (Use below search to search all articles and widget documentation)	
Only looking for features that you can self-configure with no additional cost?	Click on the table filter and select '**Self Config = Yes**'.	
Only looking for B2B, or only looking for B2C functions?	Click on the table filter and select '**B2C**' + '**Both**'. (And for B2B select 'B2B' + 'Both')	
Looking for features that are available on your current, or a newer version? (This is a great resource for when you are considering or have completed an upgrade)	Click on the header '**Min Version Req**' to re-order the features by version. '**.**.**' means there are no min version requirements.	
Looking for a full list of all our Articles?	For a full list of Widgets, How-to's, Settings, and Version Info, go to CV Connect Home.	

We recommend that you begin your search from the table below using CTRL+F (or Command+F on the Mac). If you can't find what you need in this page, then you can search our entire Knowledge Base using this search.		

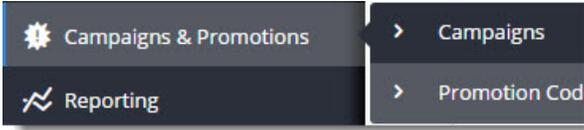Use the Table Filter to orgainise functionality by how you would like to see it.

	Business Function	Feature	Feature Overview	BPD ONLY	Min Version Req	B2B B2C	Additional info	Pre-Reqs/ Gotchas	

	Social Media	Facebook Sign-In for BPD	Facebook Sign-In is a secure (OAuth 2.0) login method that aims to reduce friction and "login fatigue" for your users. Instead of signing in to your website with an email address and password, your customers can login using their Facebook account.	Yes	04.03.00	B2C	--	Have the '**Third Party Login**' feature enabled in the CMS. Contact us to switch this on for you
	Self Serve	New standard Dashboard widgets	Five new standard dashboard widgets have been created for use out-of-the-box: 1. Dashboard Account Status Widget 2. Dashboard Articles Widget 3. Dashboard Back Orders Widget 4. Dashboard Product Favourites Widget 5. Dashboard Recent Invoices Widget These widgets have formerly been custom implementations for B2B sites, but are now available to everyone!	Yes	04.10.00	B2B	You can control the visibility for each widget to create different dashboards for different types of users by utilising our 'Layers' technology. More options are available for configuration by our Project Team so contact Support if you'd like to know more. If you're using our Page Preview feature, you can see what your new dashboard will look like *before* you send it Live!	**
	Self Serve	Product Documents	Offer your customers more in-depth product information with a document download! You can now upload a variety of file types in the CMS, giving your customers the ability to download tech specs, shiny brochures, or safety data sheets. And all without cluttering up that sleek product detail page you've so carefully crafted. This article will show you how.	Yes	4.00.00	Both	n/a	The **Product Documents feature** must be enabled. Please contact our friendly Support Team
	Self Serve	Invoice Reprints	Your B2B customers can reprint invoices for all of their orders in PRONTO 24/7 - regardless of the entry point (Online, POS, etc). They can do this online without your assistance by: 1. selecting an invoice and requesting a reprint 2. entering an email address 3. selecting a format (.pdf or .csv.) Invoice reprint requests are sent from the web to your ERP, and then 'printed' using either email2me, or TrueForms Director.	No	• PRONTO version 670 • proledb version is dependent on method used.	**B2B**	• Reduces cost to serve by eliminating contact with Accounts Receivable staff for invoice reprints. • Ability for end users to get invoice reprints 24 / 7. • If you do not have all of the prerequisites listed in the table below, please contact Commerce Vision to discuss your needs.	1. You have a printer named 'email2me' set up on your network, OR TrueForms Director is installed in your ERP environment 2. For PRONTO, version 670 or above is required 3. A version of the Commerce Vision program proledb.spl dated after 27/11/13 for TrueFor proledb version 4.25 for email2me. 4. Shell access to the ERP Server 5. A knowledge of ERP System Administration 6. UNIX editor skills such as vi skills

	Self Serve	Dashboard counters for outstanding tasks	The Outstanding Tasks Display widget allows you to display a quick indicator for your B2B users. At a glance, they can see how many orders are on hold, require approval, or are awaiting payment.	NO	**.**.**	B2B	--	
	Self Serve	Order Tracking	Customer Self Service allows for easy online order tracking, where users can search for specific orders, filter by date, product, order status, and so forth.	Yes	**.**.**	B2B	With order tracking enabled, it's possible to customise the order status descriptions that users see. Refer to How to customise Order Status descriptions for further information.	**
	Self Serve	OCI and cXML Punchout functionality requirements	OCI Punch-out is used to allow customers who use procurement systems to access your catalogue and return the cart to their procurement system. Website Administrators should refer to this document when considering adding capabilities to their Commerce Vision powered website to allow access via Procurement Punchout by their customers. Punchout capability is supported by the Customer Self Service Web Application but is not 'out-of-the-box' functionality. As such, Website Administrators should contact Commerce Vision to express their interest in having this functionality added. This document provides a set of questions to be used as the basis of this process.	Yes	**.**.**	B2B		**

	Searching	Product Search With The Lucene Search Engine	• Lucene Introduction • Lucene Relevance Scoring And Boosting • Lucene Advanced Search Queries • Lucene Index Settings For Product Search • Lucene Word Stemming • Lucene Boost Word Maintenance • Lucene Query Translation Maintenance • Lucene Index Translation Maintenance • Lucene Trim Word Maintenance • Setting Up Lucene Index Fields • Did You Mean - Lucene Search Suggestions • Configuring Lucene - Fast Start • Lucene Search Tools • Resources And Template Tokens For Lucene Search	Yes	**.**.**	Both	--	--
	Promotions	Whole Order Discounts	Give your customers an incentive to order online! Our Whole Order Discount feature is designed to offer users a discount on their total order value, irrespective of any existing ERP-based discounts or special pricing they may already receive. The discount is completely web-based, and is automatically applied to the cart - without the user needing a promotion code or coupon at checkout.	Yes	4.07.00	B2B		--

	Category	Title	Description		Version	Type	Notes	Prerequisites
	Promotions	**Tiered Promotions**	From version 3.85 onward, promotion codes can be configured with tiers, or discount levels. As the user reaches the first spend threshold, they are eligible for the first tier of discounts. As their spend increases and they reach the next tier, the discount amount likewise increases. This allows configuration of varying discount levels within a single promotion code. For example, a tiered promotion scenario might entitle the user to 10% off their order if they spend $100 (tier 1). Once they reach the $200 spend threshold, they are entitled to 25% off their order (tier 2). This scenario could continue on with an unlimited number of tiers, with each level attracting a new discount amount.	Yes	3.85.00	Both	Product exclusions may also be specified, so that particular products / categories / stock groups are not counted in the spend calculation. These excluded products may or may not be eligible to receive the discount, depending on configuration of the promotion. **Please note** - Product Exclusions are only available with *percentage* discount promotions. Dollar discount promotions can be configured with tiers, but not exclusions at this stage. There are also additional advanced options that you can configure for promotions. They become available after the promo is created.	This article assumes you've already got the Promotion Codes feature enabled for your website for you.
	Promotions	**Buy X, Get Y for just $Z Promo Code**	Have you ever ordered pizza online and and been offered garlic bread for $1 when you buy 2 or more pizzas? Well that's essentially how this one works. You can specify that when a customer orders product X (in the quantity you specify), they can also order product Y at a discounted price, using your promo code.	Yes	4.00.00	Both	There are also additional advanced options that you can configure for promotions. They become available after the promo is created.	This article assumes you've already got the Promotion Codes feature enabled for your website for you.
	Promotions	**Cart Discount Promos**	Cart Discount promotions can be created to give your customers either a percentage or dollar discount on their order. To be eligible, the customer simply needs to meet a minimum spend requirement. If you like, you can even exclude certain products from the promotion. Excluded products will not count toward the spend requirement, and may or may not be discounted.	Yes	3.75.00	Both	Cart Discount Promos can now be configured to exclude products, product groups, or product categories from the promotion. There are also additional advanced options that you can configure for promotions. They become available after the promo is created.	This article assumes you've already got the Promotion Codes feature enabled for your website for you.

	Promotions	Free Product Promos	Who doesn't love free stuff?! Give your customers a token of your appreciation with a Free Product promotion. You can configure a free product promo in several ways: 1. Your customer spends $X overall, and gets the freebie. 2. Your customer spends $X on specific products, and gets the freebie. 3. Your customer buys X quantity of specific products, and gets the freebie.	Yes	3.75.00	Both	There are also additional advanced options that you can configure for promotions. They become available after the promo is created.	This article assumes you've already got the Promotion Codes feature enabled for your website for you.
	Promotions	Product Discount Promos	Product Discount promotions can be created to give your customers a percentage discount on an individual product or group of products. Rather than applying a discount to the entire order, only specific products attract the discount, once the user meets the purchase criteria that you set.	Yes	3.75.00	Both	There are also additional advanced options that you can configure for promotions. They become available after the promo is created.	This article assumes you've already got the Promotion Codes feature enabled for your website for you.
	Promotions	Free Freight Promos	Free Freight promotions can be configured to treat your customers to $0 shipping on eligible orders. All they need to do is meet a minimum spend requirement and apply the promo code to their cart!	Yes	3.75.00	Both	There are also additional advanced options that you can configure for promotions. They become available after the promo is created.	This article assumes you've already got the Promotion Codes feature enabled for your website for you.
	Promotions	Repeating Promo Codes	Encourage repeat business with a "thank you" promotion code. Once your customer buys the required minimum, they'll not only receive a % discount on the promotional product, but they'll get a NEW promo code emailed to them. This means they can return to purchase more of the same products at the promotional price, without having to meet the minimum quantity again.	Yes	3.95.00	Both	There are also additional advanced options that you can configure for promotions. They become available after the promo is created.	This article assumes you've already got the Promotion Codes feature enabled for your website for you.
	Promotions	Promotion Codes Overview - BPD	Reward your customers with a promo code! Whether it's a discount, a free product, or zero dollar shipping, creating promotions is quick and easy in the CMS.	Yes	03.75.00	Both	Some Promo types may have a minimum version so its a good idea to check the relevant article to make sure it's available for your site. You can always contact support to upgrade if required.	Before you begin, you'll need the Promotion Codes feature enabled for your BPD site. If it does switch it on for you.

	Promotions	Bonus Items	Bonus Items allow for the automatic addition of an item (or items) based on the purchase of another item. The bonus item is added at zero sell price (e.g. Buy item X, get item Y for free).	No	**.**.**	Both	--	--

	Promotions	Promotion Codes - Classic sites	Customer Self Service allows for discounts, free products, or other bonuses through the use of Promotion Codes.	No	3.49.00	**Both**	--	## System Settings
								
								Before setting up Promotion Codes, there are two site-wide settings to be determined:
								
								1. **'Enable Multiple Promotion Codes'**
								  • Ticked - allows multiple promotion codes to be applied to a single order.
								  • Unticked - restricts each order to one promotion code only.
								2. **'Disable Checkout on Promotion Code Error'**
								  • Ticked - prevents checkout of the current order if an error occurs with the promot complete checkout.
								  • Unticked - allows checkout of the current order despite any errors with the promo

	Products & Categories	Custom Catalogues	Customer Self Service features a Custom Catalogue functionality, whereby a specific 'basket of goods' can be created and made visible for a specific customer. Custom Catalogues can be assigned at a user level, customer level or role level. A single user can have access to as many custom catalogues as required. Also, a user can be denied access to the global (main) catalogue so that the custom catalogue is the only set of products the user can access. Custom Catalogues are defined in the web database only as the ERP does not support this functionality.	No	3.67.00	B2B	--	--

	Products & Categories	**Product Variants**	Product Variants are best explained with a Colour / Size scenario. Imagine that product CV149 is a High-vis Safety Vest. It's available in several different sizes and colours: • 'CV149SMYY' might represent size small, colour yellow • 'CV149MDYY' is size _medium_, colour yellow. • In fact, when you list all the possible colour and size combinations, you might have upwards of 20 SKUs just for this one product. But uploading and maintaining 20+ variations for dozens of products on your site isn't very efficient. The end result would probably overwhelm your customers, too. That's where Product Variants come in. Instead of putting all 20+ variations on the web, you can display one product (the 'master') online, and then allow your customers to select from available variants (the 'child' products).	Yes	**.**.**	Both	--	
	Products & Categories	**Product Features (CMS Metadata maintenance)**	Metadata helps your customers find what they're looking for quickly and easily. Being able to narrow down hundreds of results based on specific feature criteria makes your customers happier and more likely to continue shopping with you. Traditionally, product feature data (or metadata) has always come from the ERP, meaning someone needed to go into PRONTO (for example) to maintain this information. But with our Best Practice Design sites, you can maintain all of your feature metadata via the CMS. No more editing first in the ERP then integrating to the web. With Product Features, you can see and update product metadata online.	Yes	4.01.00	Both	• Allows end users to quickly find the products that match their requirements. • Allows end users to compare features between products. • Generally results in better order conversion rates.	See Article for Prerequisites. Also, Commerce Vision recommends that this task be done on all products without features being excluded from searches.

	Products & Categories	Web Category and Product maintenance in PRONTO	You can maintain products and categories for the web via the **'Web Product Maintenance'** menu in PRONTO. Available functions include: • Maintain web categories • Add / remove products from the web • Add / remove products from alternate categories • Maintain 'up sell' products (accessories) • Maintain 'cross sell' products (alternates) • Maintain product notes • Maintain product search keywords • Maintain product metadata	No	**.**.**	Both	--	--
	Products & Categories	Adding Products to Categories via Category Maintenance	If you maintain your product & category structure in the CMS, there are 2 ways you can add products to categories: 1. go via the *Product* itself and add it into one or more categories, or 2. go via the *Category* and add multiple products to it. This article will outline method 2. For information on method 1, see this article - Adding Products to Categories via Product Maintenance.	Yes	**.**.**	**Both**	--	In order to use this method, you'll need to 1. '**Enable Maintenance of Product Categories'** in your Product Maintenance feature set /ProductMaintenanceSettings/OnlineProductMaintenanceFeatureSettings). 2. '**Disable Product Category Integratio**n' in your system settings (https://cms.commerce pageName=zSettings.aspx).
	Products & Categories	Assign products in Category Maintenance	How many times have you been editing a category and wished you could add products to it while you were there? Good news - now you can. We've added handy new functionality to Category Maintenance, allowing you to add, remove, and import products - even in bulk.	Yes	**.**.**	**Both**	--	MultiExcerpt named '**Pre reqs**' was not found The page: **Assign products in Category Maintenance** was found, but the multiexcerpt name the page name used in the 'multiexcerpt-include macro.
	Products & Categories	CMS Category Maintenance	The product categories on your website are initially integrated from your ERP, but if it suits your business processes, you can bypass PRONTO category integration and opt for complete online maintenance.	Yes	**.**.**	**Both**	--	In order to maintain categories online: • The '**Product Maintenance**' feature must be enabled with the '**Categories**' option ticked implementation phase, you can request that we update it for you at any time. • Category integration from PRONTO must be disabled (by Commerce Vision) via the flag - otherwise the changes you make in the CMS will be overwritten on the next send of da Once the above conditions are met, you're ready to maintain your product categories in the CM

	Products & Categories	Assigning role-based Category Templates	This article is aimed at Customer Self Service web administrators who seek to implement different category templates based on a user's role. For example, having the website display one category template for B2B users, and another for B2C users.	Yes	**.**.**	**Both**	For information on creating and editing templates, see Template Editor How Tos.	--
	Performance	Product Category Quick View	To optimise speed in scenarios where live pricing calls are made to PRONTO, Quick View functionality can be enabled. With Quick View, product pricing and availability is not shown on initial page load. Instead, these calls are made to the server on demand when the user clicks 'Quick View'. That data is then cached for the user, thereby improving speed and performance.	Yes	**.**.**	B2B	--	Works in conjunction with 'Live Pricing'
	Payment Types	PayPal Express Checkout	With PayPal's Express checkout, users are able to complete their purchase in fewer steps. Customers can use the delivery and billing information they have stored with PayPal, rather than re-entering it all again on your website. This makes checkout quicker and easier, thereby increasing conversion rates.	Yes	**.**.**	B2C		Merchant Account with PayPal
	Payment Types	Buy Now, Pay Later	Giving your customers another way to pay for purchases can make shopping easier and remove barriers to purchasing. It can also translate to increased sales for you. BPD websites have the ability to offer interest-free **Buy Now, Pay Later** options to your customers, such as zipPay / zipMoney & Afterpay. Along the same lines as old fashioned Lay-by, the customer pays for their purchase in installments over a period of time. The difference with Buy Now, Pay Later is that they get their goods **now**, rather than waiting until the purchase is paid off.	Yes	Dependent upon payment provider	**B2C**	## Set-up Guides - **zipPay / zipMoney** (version 3.99+) - https://cvconnect.commercevision.com.au/x/TgFgAg - **Afterpay** (version 4.08+) - https://cvconnect.commercevision.com.au/x/NAFgAg - **Openpay** (version 4.04+) - https://cvconnect.commercevision.com.au/x/_4BJAg	Merchant Account with payment provider

	Payment Types	Turning Credit Card Payments On for Customers	In Customer Self Service, the option to pay by credit card can be toggled on and off at the Customer level. This is especially helpful where some customers allow payment by Corporate Credit Card, where others prefer orders to go on Account to be reconciled at a later date.	Yes	4.01.00	**Both**	For assistance with sites not already accepting Credit Cards, please contact Commerce Vision Support.	Please note that the website must be configured to process Credit Card payments before the C
	Payment Types	Credit card authorisation and capture method	Customer Self Service supports the use of a credit card authorisation / capture mode whereby the credit card is not charged until the goods are shipped.	Yes	4.01.00	**Both**	For assistance with sites not already accepting Credit Cards, please contact Commerce Vision Support.	Please note that the website must be configured to process Credit Card payments before the C
	Payment Types	Payment Gateway and Credit Card Surcharges	Surcharges (or discounts) can be set up for different online payment methods. You may wish to recoup the charges passed on to you by various credit card merchants, for example. Different charges can be applied to different payment types as you see fit. A common scenario might be 1.5% surcharge for Visa & Mastercard, and 3% for AMEX.	No	none	**Both**		--
	Payment Types	Account Payment for Customers - Classic sites	Customer Self Service features a **'Pay Your Account'** functionality which allows customers to pay outstanding invoices by credit card. Customers can select from pre-defined time periods, part-pay invoices, and request invoice reprints via the Account Payment page.	NO	**.**.**	**B2C**	The 'Disallow Account Payment Adjustments' flag can be set at both the Role and Customer levels.	Prior to enabling Account Payment functionality, the site must have an online payment facility in Dialect).

	Payment Types	Online Payment Types	Customer Self Service (CSS) can easily be configured to accept a variety of online payment types	No	**.**.**	**Both**	Comparing: Credit Card / PayPal / PayPal Express / BPAY / EFT / Direct Deposit / Account Payment	--	
	Orders	Order Confirmation Emails	Customer Self Service features a function whereby a copy of the 'Order Confirmation' email can be sent to additional recipients (for example a Customer Service team), to advise that a new order has been placed and successfully integrated. Most site administrators will already be receiving an 'Order Placed' email which is generated when the order has been submitted online. Receiving a copy of the 'Order Confirmation' email is a popular option because the template contains information such as the Debtor Code and ERP Sales Order Number. The email confirmation copy is enabled at the Role level.	Yes	**.**.**	Both	--	--	
	Orders	Template-based Order Confirmation emails	For classic sites not utilising our BPD framework, CSS uses Templates to customise the order confirmation email sent to users on submission of a new order. Such templates override the default generic email, with an appearance that can be fully customised to your business needs. Email templates can be set at either the role or system level; role-based templates take precedence over system level templates.	No	**.**.**	Both	--	--	

	Orders	BCC Order Confirmation emails	Customer Self Service features a function whereby a copy of the 'Order Confirmation' email can be sent to additional recipients (for example a Customer Service team), to advise that a new order has been placed and successfully integrated. Most site administrators will already be receiving an 'Order Placed' email which is generated when the order has been submitted online. Receiving a copy of the 'Order Confirmation' email is a popular option because the template contains information such as the Debtor Code and ERP Sales Order Number. The email confirmation copy is enabled at the Role level.	Yes	**.**.**	Both	--	--
	Orders	Carrier Track and Trace links	Customer Self Service features Track and Trace links for carriers that support this functionality on their own websites. This article describes the setup for those tracking links.	Yes	**.**.**	B2B	--	--
	Orders	Order Approvals	Commerce Vision's **Order Approval** functionality allows customers to set an approver for orders over a specific dollar amount.	Yes	**.**.**	B2B	If you'd like to use Mode 3 approvals, see our articles on Advanced Order Approval - Types and Approval Groups to determine the best set-up for your customers. Due to complexity, you may require some consultation with us to determine the best route. Feel free to contact us for assistance!	**
	Marketing	Importing Products to a Promotion	Free Product promotions can be configured in a few different ways, one of them being the requirement to purchase from a pool of eligible products in order to receive the free item. If your eligible product pool contains scores of product codes, you may wish to import them from a spreadsheet when creating your promo code in the CMS.	Yes	**.**.**	Both		--

	Marketing	Banners by Device - new interface	You can upload one banner for all devices, or have one image for mobiles and another for tablets and desktop. Recommended file sizes and dimensions are displayed under each device, as well as the *actual* file size & dimensions of each image you've uploaded. This allows you to see where you might have excessively large files which may not give your users an optimal mobile experience.	Yes	4.09.00	Both	--	N/A
	Marketing	Page Preview	Ever wanted to edit one of your website pages and see what your changes look like BEFORE you hit publish? Our new CMS Page Preview functionality means that now you can! Page Preview is feature-based, meaning it will not automatically be enabled for your site. You can elect to turn it on for just your Stage site, your Live site, or both.	Yes	4.08.03	Both		--
	Marketing	OG tags for Social sharing	Have you ever copied a link to a product page on your site, only to paste it into a Facebook post and have some random image show up instead of the picture of the product? This enhancement makes that a thing of the past. Open Graph (OG) protocol tags have now been added as standard to all BPD sites running version 4.11+, to assist with content when sharing pages to social platforms. So, when posting one of your site's pages to Instagram or Facebook (for example), core data such as Title, Description, SEO url, image, and image alt text are correctly pushed across for use by the social platform.	Yes	4.11	Both	OG tags will now be present in the page source data for all Product, Category, Article, and CVMenu Item pages. This is handy not only for *you*, but also for your customers who may like to share your products or articles with their networks.	N/A
	Marketing	CMS File Manager	Want to upload multiple files? Edit images? Drag and drop files from your PC into your website's file directory? With our new File Manager, you can!	Yes	03.97.00	Both	--	--

	Marketing	Product Quick View	Give your customers the ability to see product details instantly with a Quick View popup. As users shop your site, they can check product pricing and availability, then add the product to their cart, all without navigating away from the page they're browsing.	Yes	03.97.13	Both	The Product Gallery Widget can now also be used in the Product Quick View popup to help streamline the user experience.	--
	Marketing	Article Page - Zoned layout	You probably already know that BPD websites come equipped with a clean, well-organised news article layout right out of the box. But what if you've got additional content to display in your articles? Or what if you'd prefer a customised page layout, completely unique to your site? That's where the zoned layout option comes in! By using a zoned article layout, you can present your article in the layout of your choice, with content arranged as you please.	Yes	**.**.**	Both	--	--
	Marketing	News Articles	Articles differ from static content in that they can change based on posted date, start, and finish date. For example, a promotional article could be published which would disappear at the end of the promotional period.	Yes	**.**.**	Both	Articles can also be targeted to specific customers or users. Simply populate the relevant field with the required Customer Code, Type, or User Email Address, for instance. The article will then be restricted to that user or group. Leaving these fields blank will default to ALL users.	--
	Marketing	Add To Order Template from Product Pages	Order Templates are used (primarily) by B2B users to save frequently ordered products. For example, a monthly stationery order can be saved as a template for easy re-ordering. Order Templates can even be shared across companies, so that all users attached to the Customer Code have access. Traditionally, to add a product to an Order Template, it would first be added to the cart. Once in the cart, the user could then add the product to an order template. From version 3.88+, the Add to Template function can be implemented on the Product Detail page, allowing the user to add a product to a template and keep browsing. This saves on page loads and prevents the user being redirected to the cart before they're ready.	Yes	03.88.00	B2B	--	--

	Marketing	**Displaying Kit Components**	Kit items are defined in the ERP by an Item Type 'K' and a Bill Of Materials (BOM). The BOM is the list of all the items which make up that kit. It's often beneficial to list the components of a kit on your website, especially if they are not detailed in the product description. A Kit Component Display widget is available to list the components / BOM on the product detail page. This guide details its implementation.	Yes	03.81.00	Both	--	--
	Marketing	**Product Compare Functionality**	Product Compare functionality gives your customers the ability to compare the features of every product on your website. The user selects up to 3 products to be compared, and the features are presented side-by-side in a pop-up window. The user can add the products to their cart here (assuming the product is available for purchase), or they can close the window and browse for further products to compare.	Yes	03.75.00	Both	Custom product fields can also be added to the Product Compare grid if required. Follow this guide to add a your custom field (usually prefixed with 'CUS_') to the '**GetProductComparisonInformation-append**' field group.	--
	Marketing	**Product Ribbons**	Ribbons are an eye-catching way to highlight specific products to users browsing your site. BPD includes several ribbons out of the box, as well as the ability to upload your own ribbon images for use on products throughout your site.	Yes	**.**.**	Both	--	--
	Marketing	**BPD Questionnaires**	Customer Self Service Questionnaires are a flexible way to create and present forms and collect user information. Some common uses include: • Contact Us • Returns • Warranties • Feedback	yes	3.78	Both	--	--

	Marketing	Cross selling and Up selling - Prod uct sugg estio ns for your users	Relevant product suggestions are a great way to help your customers find what they need. Whether it's the correct light bulb for the lamp they're buying, or a newer model of the power tool they're viewing, you can increase sales and improve the customer experience by offering alternate & accessory product suggestions.	Yes	3.75+	Both		--
	Marketing	Auto matic imag e taggi ng for varia nts	Your master products can be automatically updated with their child images and tagged for image switching. This means that as you add a child product to a master in the CMS, as long as that child has an associated image, it will be copied across with the correct tags.	Yes	4.04.00	Both	Good to know ✅ This functionality works whether your product images are loaded via the CMS, or sent via the Integrator!	Prerequisites ⓘ • Your site must be running version 4.04 or higher • The child product needs an image loaded against it. • The child product can't also be a master product. • The child product can't be a child to more than one master - this feature works for one-t...
	Marketing	Articl e Maint enan ce	Commerce Vision's CSS websites include an out-of-the-box Article functionality that can be used in various scenarios. Whether it's latest news, blogs, or FAQs, our article system can help you present fresh content and communicate more effectively with your customers.	Yes	**.**.**	Both		None
	Marketing	Owl Caro usel 2	BPD websites use a jQuery plugin called *Owl Carousel* to render responsive sliding carousels in widgets such as: • Banner Slider Widget • Campaign Slider Widget • Product Gallery Widget • Article Slider Widget Owl Carousel 2 comes additional functionality, especially around transition animations and navigation.	Yes	04.05.00	Both	Prerequisites ⓘ BPD websites on version 4.05 + will automatically use version 2 of the Owl Carousel. If your site is on an older version and you'd like to take advantage of the new carousel options, please contact us to discuss an upgrade.	None

	Marketing	Checkout Message	Checkout messages are used to display messages to the user when they are finalising their order. You might use checkout messages to communicate: • Certain rules and regulations to be taken into account when purchasing certain products, ie hazardous substance warnings; • Changes to orders over holiday periods; • Expected shipping delays on certain products.	Yes	**.**.**	Both	--	--
	Marketing	Modal Window Login	Instead of a dedicated login page, your site's login functionality can be presented in a modal window. This gives the user a focused context for login, without navigating away from the page they were on.	Yes	**.**.**	Both	The original Login / Logout widget can be deleted from the Theme Layout at any time, however simply disabling it will give the same effect while still leaving the widget intact for future use.	--
	Marketing	Cart Preview on Hover	The Cart Summary link can produce a pop-up window previewing the contents and cost of of the user's shopping cart. This is useful for allowing the user a quick look at their shopping basket, without navigating them away from the products they're currently browsing.	Yes	03.87.00	Both	--	--
	Marketing	Keep Me Logged In	From version 3.78+, websites using Best Practice Design can be configured with 'Keep Me Logged In' functionality. This presents users with the option to remain logged in, overriding the usual session timeout period. A user who ticks this option won't need to log back in with their credentials next time they visit the site, unless they've exceeded the maximum period determined by you.	Yes	03.78.00	B2B	--	--
	Marketing	Online Gift Cards	CSS supports online Gift Cards via the implementation of the Gift Card widget.	Yes	**.**.**	Both	For sites with many B2C Customer Codes, contact Commerce Vision Support and request a bulk update.	Before you begin, ensure that your ERP has a special 'CSSGC' account set up for Gift Card tra find additional information here - PRONTO and Online Payments.

	Marketing	Google Tag Manager and BPD	Google's Tag Manager allows administrators and digital marketers to track user behaviour and improve conversion rates on their websites. To this end, Commerce Vision websites on version 3.87+ now have tracking functionality enabled out of the box, pushing rich data on nearly every site event. This guide details the data sent for various events, which can then be used with Tag Manager's Remarketing and Enhanced eCommerce functions.	Yes	3.87.00	**Both**	(Google Tag ID required)	--
	Marketing	Google Shopping - Product Feeds	Create Google Shopping campaigns to put your products in front of shoppers who are looking to buy. When a potential customer searches for a product, Google can display yours above the list of search results. A photo, title, price, and your shop name will appear, meaning the customer is only a click away from you and the product you're selling.	Yes	**.**.**	**Both**	Please be advised that the creation of the XML product feed is classed as a minor project by Commerce Vision, and therefore attracts an implementation fee.	This feature requires a Shopping campaign in Google AdWords linked to your Merchant Center
	Marketing	Google Sign-In for BPD	Google Sign-In is a secure (OAuth 2.0) login method that aims to reduce friction and "login fatigue" for your users. Instead of signing in to your website with an email address and password, your customers can login with their Google account — the same account they already use for Gmail, Docs, Google+, and other Google services.	Yes	3.96	**B2B**	--	You'll need the '**Third Party Login**' feature enabled for your site in the CMS.
	Marketing	Price Book Export	Customer Self Service features an export wizard that allows logged in users to export product data from the website (Price Book Export). In a B2B environment, your customers may require product data from your website in a CSV or PDF format. Our Price Books include product codes, descriptions, and related data, including the customer's pricing based on all relevant ERP pricing rules. The export runs as a wizard and also allows the customer to save each profile for future use.	Yes	3.65.00	**B2B**	To enable data export functionality for customers, please contact Commerce Vision Support.	**

	Marketing	Flyer Creator	Do your customers distribute products on your behalf? Would you like to give them a way to advertise those products on the fly? Perhaps Sales Reps would appreciate a 1-page flyer they can leave with their customers. Or they'd like to include marketing material in the cartons leaving their warehouse. Allow us to introduce Flyer Creator! You can now give your customers the tools to produce simple product flyers directly from your website. Content is generated in seconds and output in PDF format.	Yes	3.94.00	B2B	--	Before you can take advantage of Flyer Creator functionality, you'll need the feature enabled. on for your website.
	Fulfillment	Attaching Documents to Orders	If you allow customisation or personalised items in your product offering, you may encounter scenarios where you require extra information from your ordering customer. Perhaps you need an image file or PDF from them before you can fill their order. In these instances, it's immensely helpful to offer a file upload facility in the shopping cart. The Order Documents widget does just that - users can attach files to their order, which are then submitted with their cart. These files are stored on the server and can be accessed by administrators via a link on the Order Placed email.	Yes	03.82.00	Both	--	--
	Fulfillment	Authority To Leave	Offer users 'Authority To Leave' functionality at checkout. This feature allows users to grant authority and nominate a designated location for their order to be left, in the event they are unavailable at the time of delivery. Authority To Leave information is then mapped to the Delivery Instructions field on the PRONTO sales order at integration.	Yes	03.83.00	Both	--	--

	Fulfillment	Region Freight	Region Freight allows your business to charge freight based on regions defined against the Debtor Account. The difference between "standard freight" and "region freight" is that you can nominate the region a customer belongs to and charge accordingly, as opposed to linking charges to a postcode range. For example, you might have a group of debtors (from the same parent company) with whom you have agreed to a particular freight arrangement, regardless of their postcode. All of these debtors can have the same region defined using Region Freight.	Yes	**.**.**	B2B	Region Freight is not compatible with Standard Freight – if Region Freight is turned on, and Standard Freight is defined, Region Freight charges will be removed at the order conclusion page (unless templated checkout is in use or the 'Calculate Freight on B2B Order Conclusion' flag is disabled. Excluding Customers from Region Freight - If you do not want a particular debtor to use Region Freight, ensure their Delivery Seq is set to '0'.	--
	Fulfillment	Overview Of CSS Freight Capabilities	CSS has a wide variety of capabilities when it comes to charging freight. This articles describes at a high level what the application can do. Contact Commerce Vision for more information on any of these functions.	Yes	**.**.**	Both	--	--
	Fulfillment	Standard Freight	Customer Self Service 'Standard Freight' is a charging method which can be configured by postcode, by order value, by consignment size, or a combination thereof. The freight matrix can be as simple or complex as required, with different parameters able to be specified for different regions. There are 3 main components to set up: 1. Freight Countries 2. Carriers 3. Charging Zones	No	**.**.**	Both	Please Note - in order to use Special Freight Products, the system flag 'Enable Special Freight Products Checks' must be turned on (found in the CMS Settings page, /zSettings. aspx).	--
	Fulfillment	Click & Collect	Customer Self Service's Click & Collect functionality allows users to order products online and collect them at a store location convenient to them. Click & Collect can be a valuable sales driver, as it allows the customer to avoid shipping costs and receive their order on the same day in some cases.	Yes	03.82.00	Both	--	--

	Fraud Protection	**Credit Card Verification**	In an effort to reduce fraudulent activity on the web, a new check is possible for online credit card payments. Credit card orders over a threshold dollar amount (which you can set), will be held until the user can verify the card is theirs. For each order, the total amount payable is split into 2 separate charge amounts on the credit card. The user has to verify one of the charge amounts for the order to be released and integrated to the ERP. Subsequent orders by the same user (or customer) will not be subject to verification once the initial payment has been validated. You can set your own variables for: Total order threshold, Payment split percentage, Number of attempts, and How long the order remains valid.	Yes	4.07	Both	**Points to note** • Guest Checkout users will *always* trigger a verification request if their order is over the threshold amount. • If the user has several orders on hold at once, they will all be released together when the card is verified. • Orders that are abandoned will need to be managed with the payment gateway (eWay) to organise a refund to the credit card.	Site must be using **eWay** payment gateway
	Fraud Protection	**Order Data for eWay Fraud Protection**	Additional order data (such as the user's name, address, and email) is sent to eWay to assist their Beagle tool in fraud detection and prevention.	No	3.88.12	**Both**	Comparing: Credit Card / PayPal / PayPal Express / BPAY / EFT / Direct Deposit / Account Payment	minimum Integrator version 4.64.02
	Fraud Protection	**Credit Card Retry Threshold**	Dealing with credit card fraud is time consuming and costly for businesses. Stolen card numbers and fraudulent transactions result in payment disputes from the genuine card owner and loss of revenue to the business involved. We've developed new functionality allowing you to limit the number of failed payment attempts on an order. Users making failed payments will be locked out from any further attempts for a set period of time. Once the lockout period expires, the user can retry their card payment.	Yes	4.13.00	B2C	If you'd like to take advantage of this credit card fraud protection feature for your own site, please contact our Support Team.	--

	Finance	Support for the IPSI Payment Gateway	The Commerce Vision CMS now includes configuration options and backend support for the IPSI payment provider. If you have an IPSI merchant account, you can enter sandbox and production credentials to begin processing payments via the IPSI gateway.	Yes	4.09	Both		Merchant account with the IPSI payment gateway
	Finance	Account Payment	Giving your customers the ability to pay outstanding invoices online is an excellent way to encourage self service. Whether they want to reprint an invoice or pay off an overdue balance, our Account Payment functionality will allow everyone to keep their finances in order.	Yes	All	B2B	• Customers can elect to pay invoices based on time period (e.g. 90 days outstanding), and the system will auto-select the applicable invoices based on their selection. • From version 4.10+, you can also offer a 'Pay Generic Amount' option, where the customer pays a lump sum, and funds are automatically allocated to the oldest invoices first. • Customise your Account Payment page template with the Account Payment Widget. This widget is what actually displays the list of invoices on the page, and you can specify button text, messaging, and more.	You must have an online payment facility in place with a gateway such as eWay, DPS, IPSI, et

	email	Widget-Based Email Templates	On implementation of a Best Practice Design (BPD) website, several email templates are configured for use out of the box. These include: • OrderConfirmation • OrderShipped • PasswordRecovery • NewUserRegistration	Yes	**.**.**	Both	Use the Email Style Sheet Widget to customise the styles for all of your emails in one place.	--
	BPD Structure	Style Sheet Editor	Style Sheet Editor Commerce Vision BPD websites all have a foundation CSS style sheet (theme.css), which gives the site its base style. To customise the look and feel, the CSS updates file can be edited to apply styling changes to elements throughout the site.	Yes	03.85.00	Both	If you upload a new updates.css file via FTP, that change will **not** be recorded in the Version History. Only changes made via the CMS Style Sheet Editor are tracked by version.	--
	BPD Structure	Guest Checkout	Guest Checkout functionality allows users to checkout without logging in or creating a user account. Most commonly used for a B2C audience, the feature allows the user to input all delivery and payment info at checkout. They can choose to create an account during this time, or remain a guest.	No	03.81.00	B2C	--	--

	BPD Structure	What is the Theme Layout?	As you browse your BPD website, you'll notice that it has a consistent look and feel across all the various page types. Whether it's a product page, a news article, or the home page, there are familiar elements common to all of them. This is thanks to the site's Theme. In addition to overarching style elements such as font type and size, the BPD Theme also governs the content of your site's common features.	Yes	**.**.**	Both	--	--
	BPD Structure	Getting Started with BPD and the CMS	**BPD Structure** Commerce Vision BPD websites are built around an overall **Theme**, with **Templates** defining each page's structure, and **Widgets** defining the content. **Layers** are then used to dictate *who* sees *what* content throughout the site.	Yes	**.**.**	Both		None

	BPD Structure	What is a Template?	Each page of your BPD website is based on a template, and each template is broken up into 'zones'. This gives the site its structure and allows page content to shrink or expand depending on the device used. There are 4 template types: 1. **Theme Layout** - site header and footer content, as well as overall look and feel. See What is the Theme Layout? for more detail. 2. **Standard Pages** - core pages common to all sites, such as the Cart, Product Detail, and Order History, to name a few. 3. **Custom Pages** - content pages unique to your site. This might be your FAQs, About Us, or Terms & Conditions. 4. **Emails** - customisable email templates for communications such as Order Confirmation, Order Shipped, or New User Registration.	Yes	**.**.**	Both	It's good practice to test changes on your Stage site first, before overhauling layouts in your live environment!	--
	BPD Structure	Layout Creator	The Layout Creator in the CMS allows you to create custom layouts for various pages throughout your site. You can even create a custom Theme, if you choose. The layout creator essentially lets you add rows to a layout, and then divide those rows up into columns. Each row can be made up of one column, or many. The guide below will show you how to create your own page layouts quickly and easily; there's even a video demonstration at the end of the article.	Yes	**.**.**	Both		

	BPD Structure	Standard Roles	Standard Roles During implementation, Best Practice Design (BPD) sites are configured with a standard set of user roles. This article outlines those roles and their intended function. Please note that your site's role names and descriptions may differ slightly from those outlined here.	yes	**.**.**	**B2B**	Not every organisation will require all of the above roles, and some organisations may wish to modify them to suit business needs. For a general overview on the purpose of roles and a guide to maintaining them, see Roles and Role Assignment.	--	
	BPD Structure	Roles and User Role Assignment	Roles are used to customise the site for a group of users. Typically, a site will have several roles set up for certain functions within the site, e.g. Administrator Role, B2B Role, B2C Role, Public Role, Accounts Role, and so forth. When a user first hits the site, they will use the default role; once they have logged in (or registered), they will then be using the corresponding role. This page is intended for use by CSS Administrators on classic (non-BPD) sites. It provides an overview of the Role function, as well as a guide to maintaining them in CSS.	no	**.**.**	**Both**	This page is intended for use by CSS Administrators on classic (non-BPD) sites. It provides an overview of the Role function, as well as a guide to maintaining them in CSS.	--	
	BPD Structure	What is a Widget?	In a nutshell, widgets are handy little reusable modules that display content and user interface (UI) elements on your BPD website (and emails!). Our widgets use Razor markup language to access the database, fetch data and display it to the end user in a pre-styled output format. BPD widgets are used in a variety of scenarios, including but not limited to: - Company Logo display - Add to Cart button - Product image gallery - Embedded video - Delivery address input	Yes	**.**.**	Both	If a widget does not find data to return for a particular page, it will simply hide itself (such as the 'Product Attribute List' widget in the example above). It's good practice to test changes on your Stage site first, before overhauling layouts in your live environment!	--	
	BPD Structure	Layers	Layers are used by all widgets to filter or restrict the widget's content to a particular audience. A layer can be based on conditions such as the user's authentication status (logged in vs. public), their role, and /or their customer code, just to name a few.	Yes	**.**.**	Both	--	**	

	Behaviour & Personalisation	Managing Product Reviews	Product Review functionality allows your customers to submit feedback about a product. These ratings and reviews are displayed on the product detail page, and can influence and inform other users during their own buying process. Displaying genuine user reviews is a great way to build trust with your current and potential customers. As you can imagine, it's important for customer-submitted content to be vetted by an Administrator prior to display on the website. Holding product reviews for an Administrator to approve or reject allows the opportunity to filter out spam or other inappropriate content.	Yes	04.09.00	Both	The reviewing user will have the administrator's response emailed to them. If you wish to customise the format of this email template, simply navigate to **Content Emails** and edit the **Product Review Notification** email. For information on configuring Product Reviews, see Product Reviews	--
	Behaviour & Personalisation	Infinite / Endless Scrolling	Entering a search term on a website can often yield hundreds of results. For sites with an extensive product list or vast categories, infinite scrolling (or endless scrolling) can be used to load products automatically as the user reaches the end of the page. This saves the user navigating through paging, and can provide a more seamless browsing experience. This guide details its implementation.	yes	03.07.00	Both	--	--
	Behaviour & Personalisation	Mobile, Tablet, and Desktop display options	BPD widgets now have some new display options! We've recently added **Show on Tablet** and **Show on Desktop** options to the existing (Show on Mobile) display option for every standard widget. Now when you target users by device, you don't have to wonder where tablet users get counted. You can be sure that exactly the right message is getting to your various user segments.	Yes	4.02.00	Both	--	--
	Behaviour & Personalisation	Recently Viewed Products	The Recently Viewed Products widget can be used to display a list of products the user has previously browsed. The fields shown on these product tiles are customisable thanks to the zoned layout template.	Yes	**.**.**	Both	--	--

	Behaviour & Personalisation	**Product Reviews**	Commerce Vision BPD websites offer Product Review functionality via widgets. Reviews are submitted by online users and feature a star rating, title, and summary text.	Yes	03.75.00	Both	Product Reviews are displayed on the product detail page of the website after being approved by an Administrator. The reviewer's name and location (optional) are displayed under the review, as well as the submission date.	--
	Behaviour & Personalisation	**Back In Stock Notifications**	Customer Self Service features 'Notify Me' functionality, whereby users can elect to be emailed when unavailable products return to stock.	Yes	**.**.**	Both	--	--
	Behaviour & Personalisation	**Wisdom of the Crowd - Suggested Products**	Have you ever been shopping online and seen "**People who bought X also bought Y**"? A great way to personalise your customer's experience on your site is to offer them relevant product suggestions. It's to this end that our new program, **Wisdom of the Crowd**, was created. Wisdom of the Crowd was written to help automate the display of related products. The program, in conjunction with the Cross Sell / Up Sell widget, will suggest products to your customers based on the common behavior of other users.	Yes	**.**.**	Both	--	--
	Behaviour & Personalisation	**Personalisation How To**	Everyone loves it when something is customised *just* for them. Now, you can tailor the content on your website to the individuals who use it. With your users' preferences in mind, you can display promotions, targeted messaging, and product suggestions. Offering relevant content through personalisation builds loyalty, strengthens customer relationships, and can drive sales. This guide will walk you through Personalisation in the Commerce Vision CMS.	Yes	4.01.00	**Both**	• This article will give you an overview of all the rules currently available within the Personalisation module, as well as sample applications for each type. Personalisation Rules • Personalisation is now extended to Guest Users from 4.09	Your website must have the **Personalisation feature enabled**. Contact our Customer Succes Please note that guest user behaviour is not tracked until version 4.09+. From this version onw allows guest actions to be logged and Personalisation rules to be applied.

	Behaviour & Personalisation	Alternate Product Substitution	In conjunction with Best Practice Design, CSS offers an Alternate Product Substitution feature, whereby out of stock items in the cart can be substituted at the user's request. This feature could also be used to showcase higher quality or higher margin products compared to those your customer has selected.	Yes	03.79.00	**Both**	Products must have Alternates configured (either in the ERP or the CMS) in order for this functionality to work. If an out of stock product has no Alternate data, the button will not display. Information on configuring Alternate product data in PRONTO can be found here.	**
	Administration	Online Returns	Online retailers experience 3 times as many returns as brick & mortar stores, and the processing of these returns is a costly overhead for most businesses. Having the ability to accept returns online can streamline the process for both you and the customer, with the added benefit of encouraging repeat business following a pleasant, hassle-free returns experience. From version 4.05.05 +, BPD websites can take care of online returns for your business. This article will take you through configuration of the feature.	Yes	4.05.05	Both		• Integrator version 4.69.02 • proledb upgrade also required
	Administration	Allowing Users With Multiple Accounts to Track All Orders	In Customer Self Service, a system setting controls whether B2B users can see and track the orders for ALL accounts they have access to, or just for account they are currently operating on. This article guides site Administrators in updating the relevant flag to enable or disable this function.	Yes	**.**.**	B2B	This functionality is not available where Live order enquiries are made, due to speed considerations with the ERP query. Only sites using standard order tracking can enable this function.	This functionality does not operate from the PRONTO Bill-To structure. The accounts MUST be the user. This allows for more flexibility in control over the accounts. See Drilling Down to a Sales Order from the Bill-To Account for details on setting this up.

	Administration	User Debtor Integration	User Debtor Integration allows for 2-way integration between your web users and your PRONTO debtors. Any time a B2C web user is created, a corresponding PRONTO customer will be created. The converse is also true - new PRONTO customers will automatically trigger the creation of a linked web user. User Debtor Integration also extends to user and customer updates. For example, if a user updates their shipping address online, their PRONTO customer record will also be updated to reflect the change. This functionality is primarily of use to our clients with physical, brick & mortar shopfronts. With User Debtor Integration, the customer experience is synchronised and consistent across the various retail channels. Order history is maintained, communication is uninterrupted, and data is always up-to-date.	Yes	03.88.00	B2C	--	Commerce Vision Integrator version 4.63 PRONTO proledb version 3.11
	Administration	Data Import and Export	Using Commerce Vision's Data Import module, site administrators can import a variety of data to selected tables of the web database. Existing data can also be exported for review. Product metadata, store location, and user data can all be imported with ease, once the profile has been created.	No	**.**.**	Both	To have a new profile created or an existing one updated, get in touch with our Support Team. Refer to our guide Setting Up Data Import and Export for more information.	--