IBM® WebSphere® Commerce V7 Feature Pack 1 – Lab exercise

Loading category calculation codes

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What this exercise is about

In this tutorial, you will learn how to load category calculation codes using the data load utility. Category (and catalog entry) calculation codes can be loaded individually or included in a category (or catalog entry) load file. This tutorial covers loading category calculation codes individually. The process for loading catalog entry calculation codes is very similar.

This tutorial should take approximately 30 minutes to complete.

What you should be able to do

After completing this exercise, you should be able to:

- Create new tax codes using Accelerator

- Create an independent load file for category calculation codes

- Test data load scripts in WebSphere Commerce Developer

Introduction

The following naming conventions are used in the exercises:

Reference Variable	Description
<WCDE_INSTALL_DIR>	WebSphere Commerce Developer installation directory
<WCDE_HOST>	Hostname for WebSphere Commerce Developer
<LAB_FILE_DIR>	Location lab files were extracted to

The compressed file, CategoryCalCodeDataLoadLab.zip, provided with this lab contains the files referenced in these lab instructions.

Requirements

Before beginning this lab, ensure you have:

- Installed WebSphere Commerce V7 fix pack 1

- Installed WebSphere Commerce V7 feature pack 1

- Completed feature enablement

Part 1: **Create a new tax code**

In this part of the lab, you will create a new tax code for the Elite store. The category (and catalog entry) calculation code data load requires the base calculation code to exist in the database before loading.

____ 1. Open WebSphere Commerce Developer and start your test server.

____ 2. Log in to the WebSphere Commerce Accelerator for the Elite store.

    __ a. Open the hints and tips page at **<WCDE>\hintsandtips.html.**

    __ b. Launch the WebSphere Commerce Accelerator using the link provided in the **Useful URLs** section.

    __ c. Log in to Accelerator.

    __ d. Select the **Elite** store.

Select Store and Language

Store name

| Commerce Plaza Catalog |
| Elite |
| EliteESite |
| EliteReseller |
| EliteResellerStorefrontAssetStore |

Fulfillment center
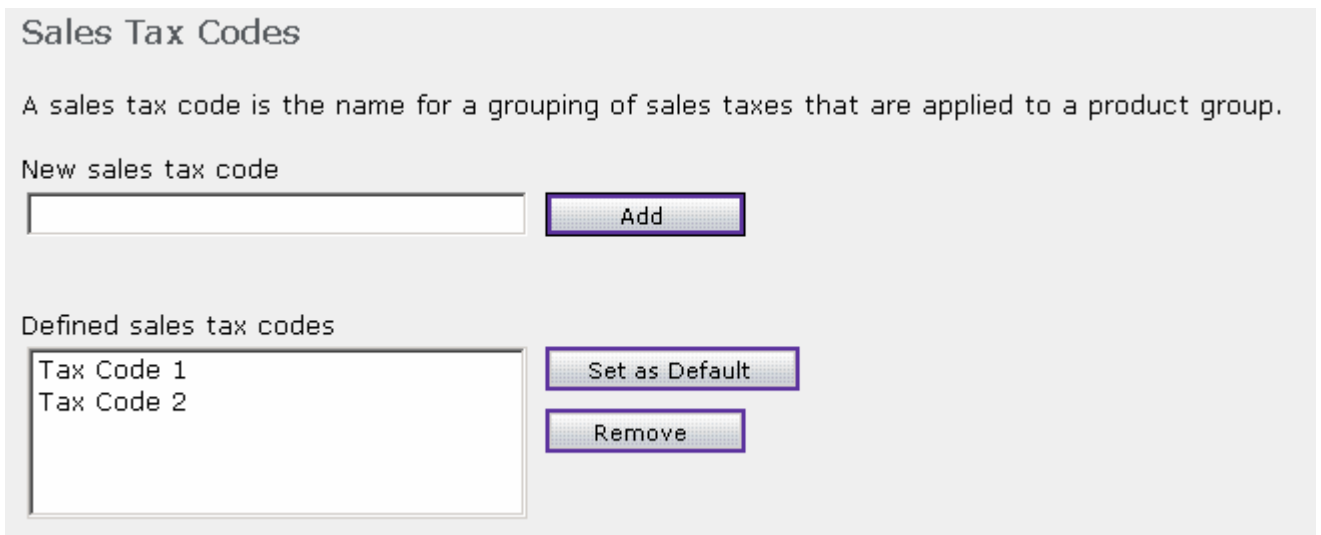
Elite

Language to work in

United States English

OK   Cancel   Help

____ 3. Create the new tax code.

    __ a. In the Accelerator menu bar, select **Store** > **Change Tax.**

    __ b. Select **Sales Tax** from the left side bar to open the Sales Tax panel.

Jurisdictions
Sales Tax
Shipping Tax
Categories
Display Names
Rates
Category Assignment

__ c. Create a new sales tax code named **Tax Code 2** and click **Add.**

Sales Tax Codes

A sales tax code is the name for a grouping of sales taxes that are applied to a product group.

New sales tax code

[   ]   [Add]

Defined sales tax codes

| Tax Code 1 | [Set as Default] |
| Tax Code 2 | [Remove] |

__ d. Using the left sidebar menu, move to the **Categories** panel.

__ e. Create a new category called **Sales Tax 2** and click **Add**.

Defined tax categories

Sales Tax	[Remove]
Shipping Tax 1	
Sales Tax 2	

__ f. Move to the **Rates** panel and set the rate for **Sales Tax 2** to **10.0000.**

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Rates

Type the rate for each applicable jurisdiction and tax category combination.

Jurisdictions	Sales Tax	Shipping Tax 1	Sales Tax 2
World	5.0000	0.0000	10.0000

__ g. Finally, go to the **Category Assignment** panel and set the assignments so that they match the screen capture below.

Category Assignment

Assign tax categories to the appropriate tax codes, by selecting the corresponding check box.

Tax Codes	Sales Tax	Shipping Tax 1	Sales Tax 2
Tax Code 1	☑	☐	☐
Tax Code 2	☐	☐	☑
Shipping Tax Code 1	☐	☑	☐

__ h. Click **OK** to save your changes. You have now defined a tax calculation code. The following parts will show you how to use data load to assign this tax code to categories and catalog entries.

Part 2: Separate load of category calculation codes

In this part of the lab, you will learn how to define a load file for category calculation codes and test it in WebSphere Commerce Developer.

_____ 1.   Prepare to create a load file.

   __ a. Open the WebSphere Commerce Information Center and navigate to **Samples > Data load utility samples > Examples: Mapping data > Examples: Mapping catalog data > Examples: Mapping category data > Example: Category calculation code.**

   __ b. Review the information and the sample CSV file for insert or replace.

_____ 2.   Create the load file.

   __ a. Navigate to **<LAB_FILE_DIR>\CategoryCalCodeDataLoadLab**. It contains the mapping file for the category calculation code load.

   __ b. Using Notepad (Start > Programs > Accessories> Notepad), create a file called **CatalogGroupCalculationCodes.csv** and save it in the same directory.

   __ c. Set up the file to assign the new **Tax Code 2** calculation code to the **Tires** category. Your completed file should look like the following.

```
GroupIdentifier,SalesTaxCalculationCode
Tires,Tax Code 2
```

   __ d. Save and close the file.

   __ e. If you have not used the data load utility before, take some time to examine the other configuration files.

   1) wc-dataload-env.xml defines the business context and database configuration information. The data will be loaded into the Elite store.

   2) wc-dataload-catgpcalcd.xml defines the data load environment. The name and location of your CSV load file is specified here.

   3) wc-loader-catalog-group-calculation-code.xml is the data mapping you saw an example of in the Information Center article.

   4) wc-loader-catalog-group.xml is not used in this lab. It is the data mapping file for doing an integrated category calculation code load. Integrated loads are covered in Part 3.

_____ 3.   View the current tax rate in the Elite store.

   __ a. Launch the Elite store using the hintsandtips.html page at **<WCDE>\hintsandtips.html**.

   __ b. Log in to the store using a previously registered test account. If you have not previously registered a shopper for the Elite store, you can use the site administrator account instead.

   __ c. Navigate to the category **Brakes > Tires** and add the product **All season passenger tire** to your order.

   __ d. Proceed with the checkout flow until you reach the **Shipping & Billing Method** page. Scroll down and take note of the amount of tax charged on your order. It should be $8.

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Note: If you have completed the VAT lab you will see a different tax amount here. This does not affect the lab.

Product		Expedite Shipping	Availability	Qty	Each	Total
	All season passenger tire SKU: A0000511 Change Attributes Contract: Elite Contract number 1234 ✖ Remove	☐	In-Stock	1	$200.00	$200.00

Promotional code: [ ] **Apply**

Order Subtotal:	$200.00
ⓘ Discount:	($40.00)
Tax:	$8.00
Shipping:	$10.00
Shipping Tax:	$0.00
Order Total:	**$178.00**

____ 4.   Run the data load in the toolkit environment.

__ a. Stop your WebSphere Commerce test server.

__ b. In the WebSphere Commerce Information Center, navigate to the page **Developing > Persistence layer > Data assets > Working with the data load utility > Running the data load utility in the WebSphere Commerce development environment.**

__ c. Follow the instructions to set up a Run configuration.

__ d. In step 4a of the Run configuration set up, type in the value shown below as the load order configuration file.

<LAB_FILE_DIR>\ CategoryCalCodeDataLoadLab\wc-dataload-catgpcalcd.xml

__ e. Finish the remaining steps and run the data load.

__ f. Ensure the load completes with no errors.

__ g. Start your WebSphere Commerce test server.

____ 5.   Test the new tax rate in the Elite store.

__ a. Launch the Elite store again if you have closed it and log in.

__ b. Create a new order with the same product, **All season passenger tire**, in it.

__ c. Proceed through the checkout flow to the **Shipping & Billing Method** page. Scroll down and take note of the amount of tax charged on your order. With the new 10% tax rate applied, it should now be $16.

Note: If you have completed the VAT lab you will see a different tax amount here. This does not affect the lab.

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Product		Expedite Shipping	Availability	Qty	Each	Total
	All season passenger tire SKU: A0000511 Change Attributes Contract: Elite Contract number 1234 ✖ Remove	☐	In-Stock	1	$200.00	$200.00

Promotional code: [   ] **Apply**

Order Subtotal:	$200.00
ⓘ Discount:	($40.00)
Tax:	$16.00
Shipping:	$10.00
Shipping Tax:	$0.00
Order Total:	**$186.00**

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Part 3: What you did in this exercise

In this tutorial you learned how to create a data load file for category calculation codes. You also learned how to test a data load file in WebSphere Commerce Developer.

You should now understand how to complete the following tasks:

- Create new tax codes using Accelerator

- Create an independent load file for category calculation codes

- Test data load scripts in WebSphere Commerce Developer

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