



## **Platform Update Release Notes**

**3.2**

2013-08-20

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## Overview

cleverbridge announces platform release 3.2, which introduces enhancements to the Commerce Assistant, subscriptions, the checkout process, and Salesforce integration.

For more information about any of the new features and enhancements in release 3.2, contact your cleverbridge client manager.

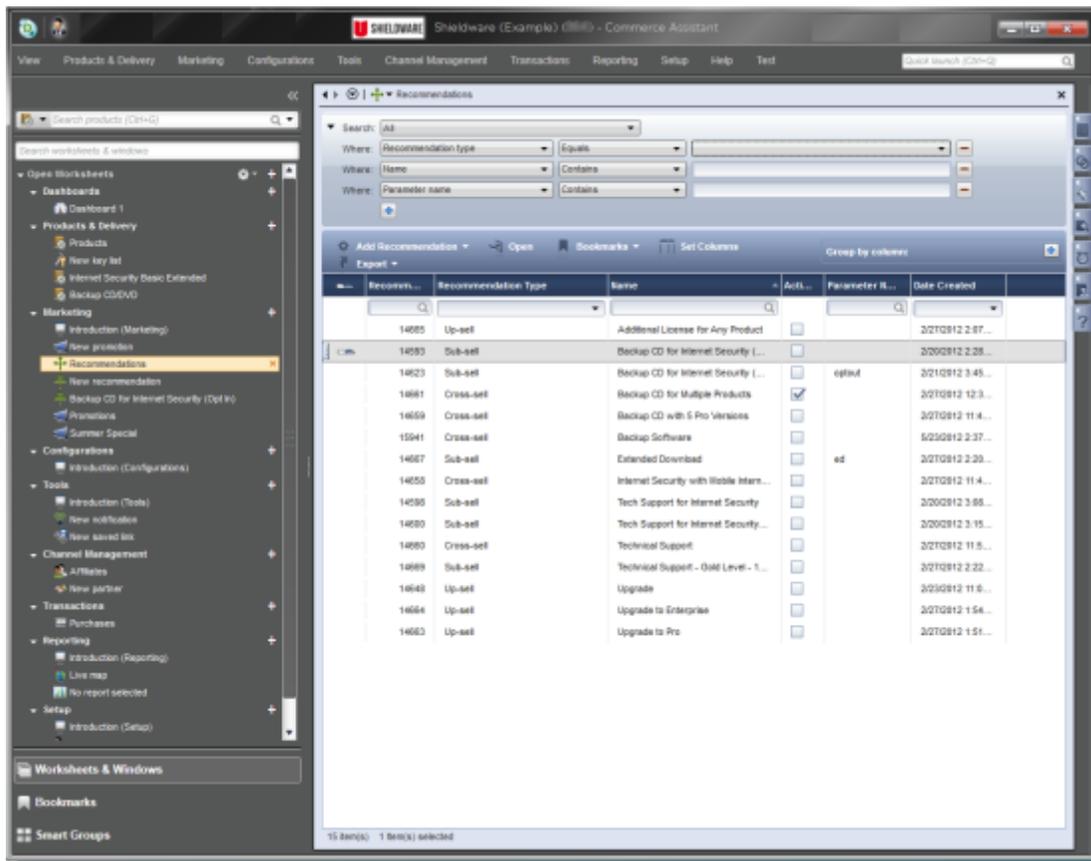
## Commerce Assistant

The Commerce Assistant was significantly enhanced with the following improvements:

- Redesigned, user-friendly navigation
- More direct workflows with fewer click paths
- Increased flexibility to support different display resolutions
- New features and other improvements

### Navigation Redesign

The navigation of the Commerce Assistant has been redesigned with a clearer application structure and minimal click paths. The main navigation is now along the left side of the application, in the new Navigation Bar. Some features have been moved to better accommodate the new navigation structure and to better fit a user's workflow.

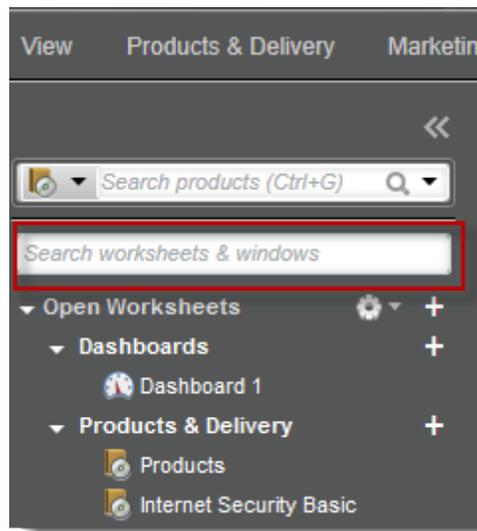


## Navigation Bar

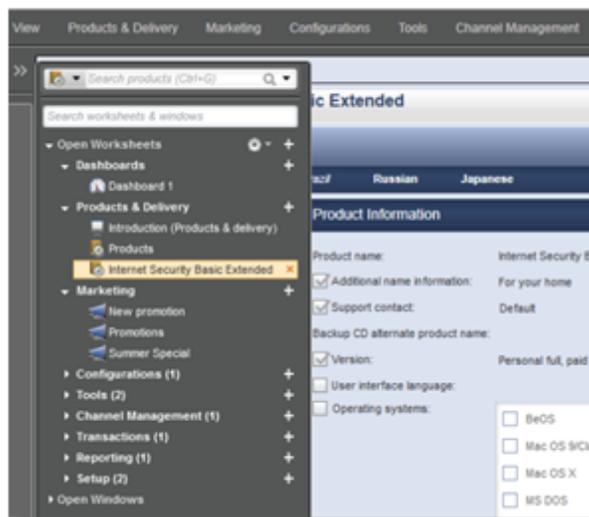
The new Navigation Bar lets users quickly and easily find and navigate through open items in the Commerce Assistant. When a user clicks an item, it opens on the right. There are three functions in the Navigation Bar, which are accessed by toggle buttons at the bottom:

- Worksheets & Windows — Used to find and access open worksheets and windows.
- Bookmarks — Used to find and manage bookmarks.
- Smart groups — Used to find and manage smart groups.

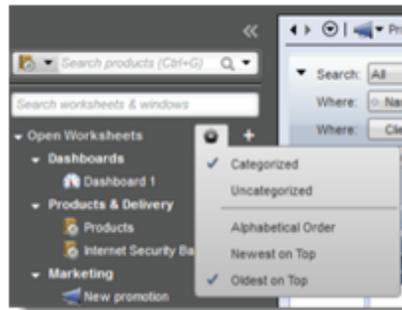
The three functions each have a search box at the top of the navigation area to quickly search for items in the list:



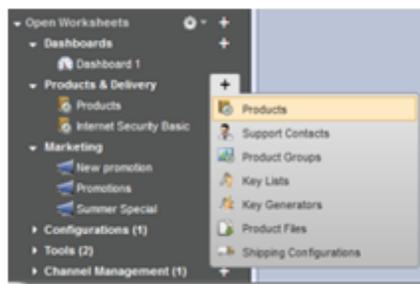
The Navigation Bar can be collapsed, expanded, and re-sized to suit a user's preferences. Users can also click the collapsed sidebar to hover it over the Workspace for quick access to items:



In the Open Worksheets section of the Worksheets & Windows navigation area, users can choose how to view and sort the list:



Users can quickly open a new worksheet by clicking the plus buttons:



If users need to keep multiple instances of a search, report, or dashboard open, they can temporarily rename them to keep track of them.

### Bookmarks Keyboard Shortcut

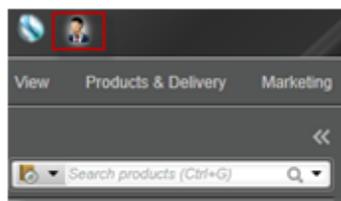
Users can now quickly access the Bookmarks section of the Navigation Bar, even when the Navigation Bar is collapsed, by pressing CTRL + B on the keyboard.

### Other Navigation Enhancements

To further improve a user's workflow and navigation of the application, the following features were moved or changed.

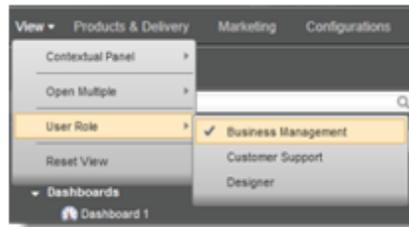
#### Client Selector

The Client Selector is now located on the left side of the Commerce Assistant's title bar. Users click the new Client Selector button to select another client account or view all accounts at once.



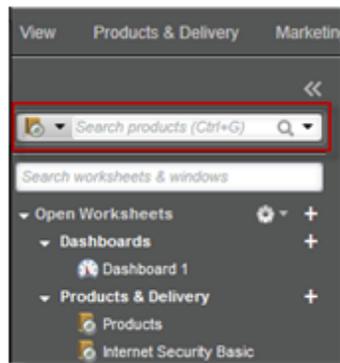
## User Role

The user role is now selected in the View menu.



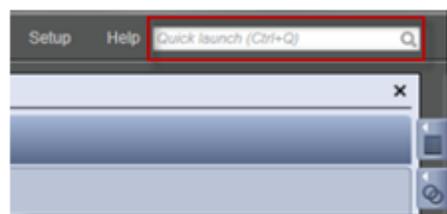
## Global Search

Global Search is now located on the left side of the application, at the top of the Navigation Bar. Users can quickly start a new search with a CTRL + G keyboard shortcut.



## Quick Launch

In the previous version of the Commerce Assistant, the Shortcuts feature was located in the Quick Find Sidebar. Now, Shortcuts has been renamed to Quick Launch and is located on the right side of the main menu. Quick Launch helps users to quickly find items from the main menu. Users can quickly start a new Quick Launch search with a CTRL + Q keyboard shortcut.



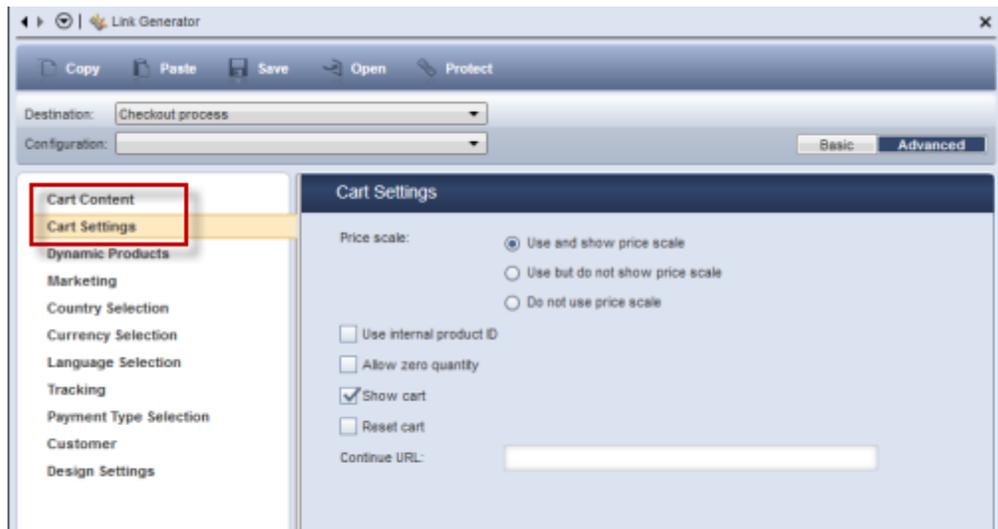
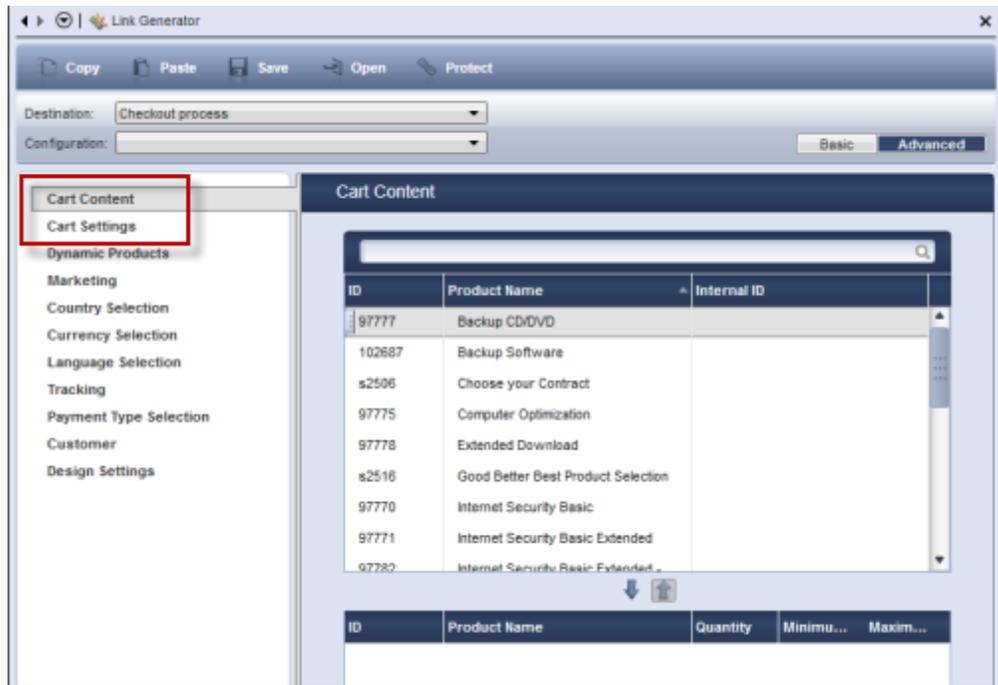
## Screen Resolution

The Commerce Assistant has been enhanced with increased flexibility to support different screen resolutions. The minimum required screen resolution has changed from 1440 x 900 to 1280 x 768, which supports smaller screen sizes.

To fit the new minimum screen resolution, the following portals were reconfigured.

## Link Generator

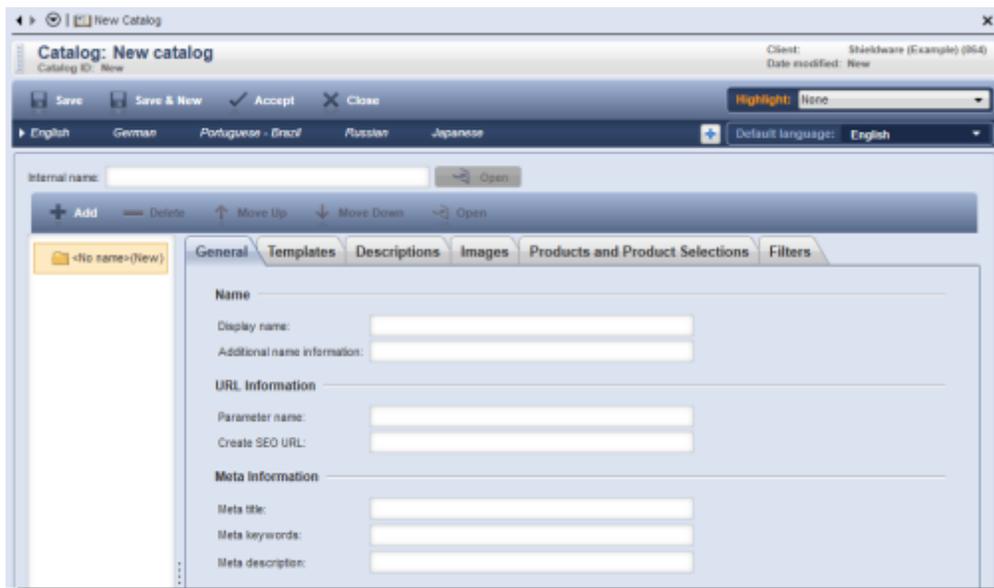
The Cart section is now split into two smaller sections, for Cart Content, used for selecting items for the cart, and Cart Settings, used for configuring advanced settings. This change applies to both the Link Generator tool and the Link Generator contextual panel.



## Catalog

The following changes were made to the tabs in the Catalog portal:

- The Templates section of the General tab is now its own tab.
- The Descriptions and Images tab is now two separate tabs, one for Descriptions and one for Images.



## Client Summary

The Commerce Assistant provides clients with robust reports and statistics that help them analyze their profitability. Now, to help clients get an even more complete view of their data, this release introduces a new Client Summary feature that provides an overview of a client's setup data in the Commerce Assistant. For example, the summary provides statistics about how many promotions are currently running, how many users are set up, how many MVT Campaigns there are, a list of the last logged on users, a list of the last modified items, and more.

If a client has more than one client account, the summary can be viewed for one client account, multiple client accounts, or all client accounts simultaneously. Users can open items directly from the Client Summary. Client Summary is located in the Setup menu.

## Clear the Link Generator

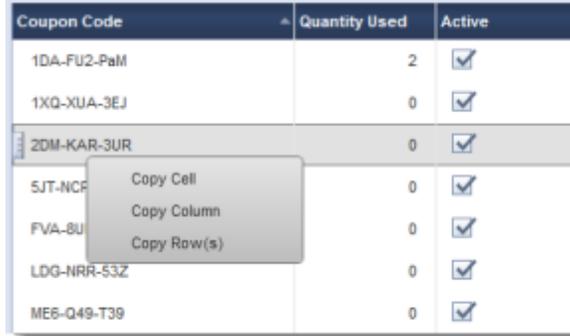
Clients often need to create several links in a row. A new Clear button was added to the Link Generator to clear the Link Generator of all previous settings. When the button is clicked, the Link Generator is set back to default. The button is provided in the Link Generator tool and the Link Generator contextual panel.

## Enhanced Copy Options in Lists

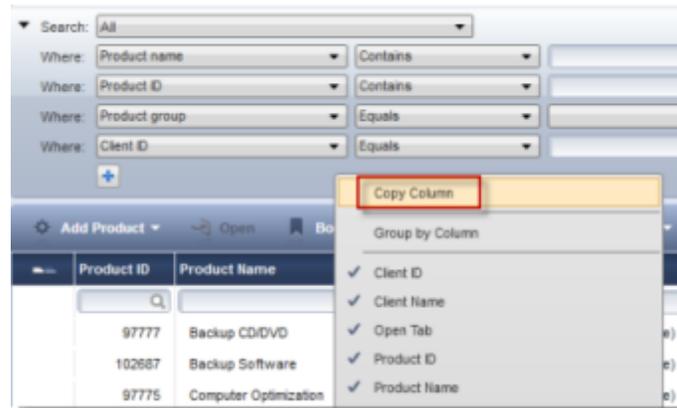
Previously, a user could copy the content of one or more rows in a search list or other lists throughout the Commerce Assistant, such as the product list in the Link Generator. Now the copy

function has been extended to include copying the content of individual cells or entire columns. Within all lists, there are new copy options in the right-click menu.

If a user right-clicks a row in a list, the following options display:



If a user right-clicks a column header, the option for Copy Column displays:



## Reconnect after Hibernate

With this release, the ability of the Commerce Assistant to reconnect after a connection loss has been enhanced so that it will reconnect after a computer is in hibernate mode.

## View and Edit Mode Changes

In the previous version of the Commerce Assistant, when a user opened a record, the record was opened by default in view mode, and the record could be switched between view and edit. In this version, the default is edit mode if the user has the appropriate privileges. For users who do not have privileges to edit data, the default is view mode. This enhancement should reduce the number of clicks for users.

For more information about the states of records, see the *Portal Actions* section of the following help topic: *Workspace*.

## Stickiness Enhancements

The stickiness, or ability of the application to "remember" how users last left it, of the Commerce Assistant keeps the last settings or changes that a user made, such as filter or column settings in a search. The following enhancements were made to the stickiness.

### **Set Default View for Searches**

Now users can override the stickiness by setting a default view of a search. By selecting the default view, the search always returns to that view. The default view can be turned off to return to the stickiness.

### **Portals Added to Stickiness**

The stickiness has been enhanced in this version to include open portals. For example, if the Product portal is open when the Commerce Assistant is closed, the portal will remain open the next time the application is opened.

### **Help Readability Improvements**

The text formatting in the Contextual Help panel and the Help Viewer has been enhanced for improved readability. Users should now be able to more easily scan and read the help information.

### **Close Commerce Assistant with Double-Click**

Users can now double-click the Commerce Assistant logo in the top left corner to close the application.

## Subscriptions

The following enhancements were made to subscriptions.

### Client-Triggered Auto-Renewals

cleverbridge offers a full-fledged subscription engine with which clients can create subscription products that auto-renew based on a pre-defined schedule. For example, a client can offer a free 30-day trial of a product and if the customer doesn't cancel the trial, the product automatically becomes a yearly subscription.

Through the use of APIs, cleverbridge also supports a model where the subscription renewal schedule is managed by the client's system. For this, the client's system triggers a renewal based on an API call to cleverbridge. This is managed by the ProcessCart API, which refers to the existing customer based on a past purchase ID or a previously-submitted customer identifier. cleverbridge then processes the renewal with payment details on file.

The ProcessCart API has been enhanced to better support client-triggered subscriptions. With these, the client's central system is responsible for triggering the automated renewal of the customer's subscription. The cleverbridge system now allows a client to start a client-managed subscription, typically by sending the customer to cleverbridge for the initial purchase, and then later to trigger subscription renewals based on the initial purchase.

Because of this, regular subscription reporting can be used. In the Commerce Assistant, subscription searches and navigation between renewals are available. Subscription billing options for product delivery can also be used, such as for license key delivery.

#### Subscription Billing Options

- Execute only on initial purchase
- Execute only on subscription billing events
- Execute on initial purchase and subscription billing events
- Execute on initial purchase and copy on subscription billing events

## Checkout Process

The following enhancements were made to the checkout process.

### Technical Support Removed from Refund Confirmation Emails

Typically, in confirmation emails, cleverbridge includes client contact information for technical questions about the products. This information is no longer provided for refund confirmation emails because the customer is usually no longer entitled to technical support after a refund.

### VAT Applied to Croatian Orders

As of July 1, 2013, Croatia joined the European Union (EU) as the 28th member state. Since then, cleverbridge applies EU Value-Added-Tax (VAT) to orders placed in Croatia, as required. cleverbridge also fully supports the validation and processing of VAT ID for business customers from Croatia.

## Integration

The following enhancements were made to integration functionality.

### **SalesForce Integration Extended for Purchase Orders**

In the cleverbridge platform, clients can accept purchase orders, typically from business customers, where the product is immediately delivered, but the customer is given net 30 days to pay for it. It is sometimes required that the invoice document include a purchase order reference ID number that is issued by the customer's accounting department. This purchase order ID number can be entered by the customer in the checkout process.

The cleverbridge SalesForce integration has now been extended to import purchase orders and any corresponding purchase order ID numbers. Using the Commerce Assistant, this field can be mapped with a respective field in the client's SalesForce account.