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Introduction

The Accord Storefront is built on the Revindex Storefront application. *The Revindex Storefront – Users Manual* explains the fundamentals of setting up a Revindex ecommerce module and how to customize basic store elements and populate your store with products. This document builds upon instructions found in the *Accord LMS – Basic Setup* document and will focus on selling Accord LMS Learning Elements and Folders via the “purchase” of Learner Roles associated (enrolled) to the Learning Elements.

Specific topics include:

- **Accord Storefront Setup**: Installing and setting up the Revindex store module and configuring advanced feature options.

- **Accord Storefront Management**: Customizing basic store elements and populating the store with products.

The Accord Storefront is a very robust ecommerce module and contains basic-to-advanced features. This document expands upon the instructions found in the *Accord LMS – Basic Setup* document, so only information for basic setup and customization of the Accord Storefront are provided.

To follow our examples, the reader/User must have the DNN Portal Administrator Role assigned to their account. Any exceptions that require Host permissions will be noted.

Prerequisites

The following guides must be reviewed prior to using this document:

- Accord LMS – LMS Admin Guide
- Accord LMS – Basic Setup
- Revindex Storefront Users Manual

This document will assume that the Accord LMS has been successfully installed and is properly functioning.

Installation

The DNN Super User (Host User) is responsible for installing and setting up the Accord store module and configuring advanced feature options. These will only be mentioned here and not explained.
• Install Revindex Store Packages
• Activate Store License / Configuring Main Settings
• Assign and Order Store Pages
• Set Up Modules to be Used on Main Store Page

For full detailed information on Revindex Setup, please refer to the Revindex Storefront Users Manual.

Any User granted the Administrator Role will get access to Admin > Store Admin and its child pages to View and/or Edit. Management tasks include customizing the basic store elements and populating the store with products.

It is possible to create a “Store Editor” Role with permissions to “View” and/or “Edit” Categories or to add products. This Role must be created and granted View and/or Edit permissions to the required pages and module by a DNN Portal Administrator.

This document will assume the reader/User has Administrator Role permissions.

Selling Access to Learning Elements
We will use subscriptions to Learner Roles associated (enrolled) to a Folder or Learning Element as the products to be “sold” within the Accord store. The “purchase” will be implemented by assigning Learner Role subscriptions to the Learner making the purchase. In the Selling Access to Downloads section, we will sell access to digital downloads of content that a purchaser may access immediately upon checkout.

You are not limited to selling only LMS content or digital downloads within your store. You can set up additional Categories and sell other products or services.

Create Learner Roles for Accord Subscriptions
Learning Roles are created to organize groups of Learners within the LMS and to control Learners’ access to coursework and the amount of time the Learners’ have access to that courseware. In the examples that follow in this document, we will create one new Role Group (Accord_Storefront) and two new Learner Roles (Acc_Training and Acc_Downloads) in the LMS Learners group.

The following is an example of creating a new Role Group in the LMS that will be used for subscriptions to be sold in the Revindex store:
While logged into the LMS as an LMS Administrator, navigate to **LMS Admin** and select **My Team**. Right click on Learners. Select **Learning Role Management**. Select **Add New Group** from the Learning Role List.

1. Configure “Basic Settings” for the new Group.
   
   a. Enter a **Role Group Name** (i.e. Accord_Storefront).
   
   b. Enter a **Description** (i.e. Purchasing Learner Roles).
   
   c. Click **Update**.

It will be important to remember the name of the Role Group and the names of any Roles created for sale in the Accord Store.

The following is an example of creating a new Role in the LMS that will be used for subscriptions to be sold in the Accord store:

1. While logged into the LMS as an LMS Administrator, navigate to **LMS Admin** and select **My Team**. Right click on Learners. Select **Learning Role Management**. Select **Add New Role** from the Learning Role List.

2. Configure “Basic Settings” for the new Role.
   
   a. Enter a Role Name (i.e. Acc_Training).
   
   b. Enter a Description (i.e. Purchased Training Role).
   
   c. Select the Role Group this Role belongs to from the list (i.e. Accord_Storefront).
   
   d. Public Role leave unchecked.
   
   e. Auto Assignment leave unchecked.
   
   f. Include Social Group (optional)

3. No **Date Details** will be configured.

4. Click **Update**.

Let’s skip ahead and assume new Learner Roles have been created as follows:

- Accord_Storefront (Role Group)
  
  o Acc_Training (Role)
  
  o Acc_Downloads (Role)
For our purposes, these two Learner Roles (Acc_Training and Acc_Downloads) will be used for subscriptions that will be on sale in the Accord store. You can, however, create/use whatever Roles you want for subscriptions for sale in your store.

Please refer to the “Create a Learning Role” chapter in the Accord LMS – Basic Setup guide for more detailed information on creating Learner Roles.

Catalog Folders to be Sold in the Store
Create Catalog Folders with Learning Elements to be sold in the store. If your LMS already contains a Catalog with Course Folders and Learning Elements, determine what Learning content will be sold in the store. The Catalog is set up in LMS Admin > Catalog.

The following is an example of creating a Catalog Folder in the LMS that will be sold in the Revindex store:

1. Go to LMS Admin > Catalog.
2. Right click on My Folders (or any other Parent Folder) and select New Child Folder.
3. In the Folder Details window:
   a. Title: Type in a descriptive title (i.e. Storefront Training).
   b. Click Update.
4. Create additional Catalog Folders as needed.
5. Add Learning Elements to each of the Catalog Folders to be sold within the store.

Please refer to the “Step 4: Build a Learning Element Catalog” chapter in the Accord LMS – Basic Setup guide for more detailed information on creating Catalog Folders with Learning Elements.

Enroll Catalog Folders / Learning Elements to Roles
You must enroll the Catalog Folders and/or Learning Elements to Learner Roles for the Learning content to be marketed in the Accord Storefront. The Accord Storefront does not actually sell the Learning Elements, per se, but subscriptions to the Learner Roles.

1. Select LMS Admin > Enrollment.
2. Select the Catalog Folders and Learning Elements from the list that you want to
sell in the store. In this example, we'll select the following Learning content:

a. **Accord Installation Training** (Catalog Folder)
b. **Accord Installation Training Video** (Learning Element)

3. Select the desired Learner Role. For this example, we will select **Acc_Training**.

4. On the Action Panel, select **Add Enrollment** then click **Submit**.
5. A dialog displays asking “Are you sure you want to Enroll the selected Folders and LE to the selected Roles and Learners?” Click **Yes**.

![Confirm](image)

6. A second dialog (when successful) displays the message “Enrollment Completed Successfully”. Click **OK** to close it.

![Message](image)
Repeat these steps as needed for each Learner Role subscription, with associated Learning Element, that will be sold in the store.

**You do NOT have to select an entire Catalog folder to enroll to a Role. You can select an individual Learning Element to enroll to a Role and, when purchased, ONLY that Learning Element will show up in the Learner’s My Courses. Although other Learning Elements may reside in the same Catalog folder in the LMS, they would not present in the Learner’s My Courses.**

Please refer to the “Enrollment” chapter in the Accord LMS – Basic Setup guide for more detailed information on enrolling Catalog Folders / Learning Elements to Learner Roles.

**Set Up a Role Group for Purchase**

You must configure Accord Storefront to accept roles assigned to products by setting the purchase role group and roles available for purchase. Navigate to the Store Admin Dashboard Page.

To create a new Storefront Role Group:

1. Select **Store Admin > Configuration Menu Choose Security**
2. Select the role names created for Purchasers of Store Products.
   
a. **Allowed Roles**: Select the Roles that will be granted on purchase.
   
   ![Allowed Roles](image)

   b. **Allowed Role Group**: Select the Role Group name of the role group of the roles that were created for purchase.

   ![Allowed Role Group](image)
The Role Group name must be used in the Security Settings. Individual Roles from that Role Group will be used when setting up the Products to be sold.

Set Up Categories (Storefront)
Categories are used to list groups of products within the store. You must create at least one Category for your products. If you have installed Accord Storefront yourself, you must create a Category as described below.

To create a Category:

1. Select Store Admin > Catalog > Categories.
2. On the page that displays, under the Category list, click the Add new.

![Categories](image)

3. The Category screen displays. Complete the following Basic Setup fields as needed:

![Basic Setup Fields](image)

- **Category Name**: Type in a name. This will be used in the store menu.
- **Description**: Type in a brief description of the products that will be listed in this category.
- **SEO**: Enter a title (it can be the same as used for the Category Name). This will be in the product’s page title for search engines.

  **Note**: No other fields need to be defined or changed for the basic setup of a Category.

- Click Save. The page refreshes and the new Advanced Category is displayed in the list.

**To edit a Category:**

1. **Select** Store Admin > Catalog > Categories.

2. On the page that displays, select a Category from the list. Click the Pencil Icon next to the name. You will see the Category tabs. Make changes as needed.

3. Click Save. The page refreshes and the new Category is displayed in the
list. **Note:** No other fields are required for the basic setup of a Category.

**Configure Products**
The Accord Storefront module allows creation and editing of products under the Product selection of the Catalog menu.

**To create a new product:**

1. Select **Store Admin > Catalog > Products**.

2. The Product Manager page displays. Select **Add New** from the Product Menu.

The Product Manager page refreshes with additional tabs to configure the new product for the store.
For this example, we will only be configuring JUST the following fields in selected tabs that we need to complete a basic product setup:

**General Tab**

1. **Name:** Type the Product Name (i.e. Accord Training).

2. Click the **Save** button at the bottom of the screen.

**Description Tab**

1. Click on the **Description** Tab
2. **Summary:** Enter a summary of the product. You can change the appearance of the text by using the various standard text tools. When your description is finished press the Save Product button at the bottom of the screen.

![Summary Text Editor](image1)

**Gallery Tab**

1. **Click on the Gallery Tab**

2. **To add images to your Product display click **Add New**

![Gallery Tab](image2)
3. **Upload File**: Click on the **Choose File** button and select an image file to upload for your product.

You can select or delete individual Detailed, Display and Thumbnail images as appropriate for your product.

When finished click **Save**

---

**Configure Product Variant**

All Products are created with at least one Product Variant. You can create more but for this example we will edit the default variant created when the product was created.

**Click on the Variant Tab**

You will see the default (empty) Product Variant set up by the system.

1. Click on **Pencil Icon**.
You are now presented with a different set of tabs specific to the Product Variant you have chosen.

**General Tab**

1. **Product Name**: Enter a unique Product Variant Name.
2. **SKU**: Enter a unique product stock keeping unit #.

**Description Tab**

*Click on the Description Tab*
1. **Description:** Enter a summary of the product. You can change the appearance of the text by using the various standard text tools. When your description is finished press the **Save Variant** button at the bottom of the screen.

![Image of Accord LMS interface with Description tab highlighted]

**Pricing Tab**

**Click on the Pricing Tab**

1. **Base Price:** Enter the product price to be listed in the store. This is also the price that a customer will be charged when purchasing the product. In our example we show a price of 7,000 currency units. In our example we had left the default currency as US dollars in the Accord Storefront Settings so this would represent a price of $7.
2. **MSRP**: Enter a value to represent the Manufacturer’s Suggested Retail Price and it will be reflected on the product detail page. The difference between the MSRP and the Base price will be shown as a savings to the purchaser.

**Gallery Tab**

**Click on the Gallery Tab**

Use the same instructions to upload images for the Gallery in the Product Variant Tab as are used to upload images for the Gallery Tab in the Products section. If you have only a single product variant and you do not upload new images for that variant then the images you uploaded for the Product will be displayed for that product variant.

**Action Tab**

**Click on the Action Tab**

Information stored in the Action Product Variant Tab controls the access to the LMS. This code is run at time of checkout. From the Place Order Action Rule drop-down select **Custom rule**. To enter the code into the Action Panel you will need to be in the “source” mode of the Action Tab. To enter the Source Mode, click on **Source** at the bottom of the Action Panel.
The XML code that grants access to leaner roles is kept here. In the example below you will see a set of statements that grant the Acc_Training role to the purchaser. The actual role grant is provided by these statements:

```xml
<grantSecurityRole>
  <roleName>Acc_Training</roleName>
</grantSecurityRole>
```

1. **Place order Action Rule:** Copy and paste the text below to grant the purchaser the role of Acc_Training at the time of checkout.

```xml
<xsl:transform version="2.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
  <xsl:template match="/">
    <out>
      <setData>
        <salesOrder>
          <status>4</status>
        </salesOrder>
      </setData>
    </out>
  </xsl:template>
</xsl:transform>
```
<salesPaymentStatus>2</salesPaymentStatus>
<shippingStatus>3</shippingStatus>
</salesOrder>
</setData>
<grantSecurityRole>
  <roleName>Acc_Training</roleName>
</grantSecurityRole>
</out>
</xsl:template>
</xsl:transform>

Click **Save variant** to save the product variant

Click **Save** to save the product
Note: These are the only Tabs and fields we will be setting up for this basic product setup.

To edit an existing product:
1. Select My Store > Catalog > Products.
2. The Product Manager page displays. Select a Product and the product tabs are displayed. Click on the Pencil Icon and edit any individual fields you choose, Click on Save to save your changes.
3. Click on a Variant and select the pencil icon to edit any of the product variant information, including price and checkout action codes. When finished click on Save variant and Save to save your changes.

To copy an existing product variant:
1. Select Store Admin > Catalog > Products.
2. The Product Manager page displays. Select a Product and click on the Pencil Icon and the product tabs are displayed. Select the Variant Tab and the Product Variants available to copy or edit will be displayed below the selected product. Select the product variant that will be the source for your copy.
3. Click on the Documents Icon to copy the variant.

The Variant display tab refreshes with a copy of the variant you wish copied. Note the asterisk character next to the Variant Name indicating a copy.
4. Edit all the information as desired to create a new product variant based on the original. A unique name and SKU should be assigned. The description will be the same as the original and may be edited. Pricing will be the same as the original and so will any information in the Action tab. If you are assigning roles at checkout and you wish the new product to assign a different role then edit the information in the Action tab (see previous section on creating variants). **Note that images from the Gallery tab will not be copied and new images may be uploaded to the new product variant.**

5. Click **Save variant** and **Save** when finished editing the new product variant.
Selling Access to Downloads
Setting up a digital download product is basically the same as setting up a product that accesses LMS content. The Category setup is exactly the same and the Product setup is exactly the same. All Product Variant tabs and fields are the same except for the General Tab and the Action tab found in the Product Variant setup.

In this example we will sell access to the Accord Storefront Setup guide. Upon checkout the purchaser will be able to immediately download the manual from the Download module setup by the Accord Storefront Installation program.

We have previously created a roll called Acc_Downloads. We will be assigning this role to purchasers of digital downloads in this example. This is an optional step and can be skipped if desired.

Add a File to Sell On Your Site (DNN File Manager)
To sell a file we must first add it to the website. For our example we will use the File Manager Utility to add the Accord Storefront Setup Guide to a directory on our site. You can sell any kind of downloadable file.

You must be logged in as a DNN Administrator. To upload a file:

1. Select Admin > File Manager.

2. Click the “+” sign next to the Portal Root Directory to expand the directory structure.
3. Click on the Docs Folder to expand the file list

4. Select Upload from the top menu bar

5. Click the Choose File Button and navigate to the location of the desired file on your local hard drive.
6. Highlight the file you wish to upload and click **Open**

![File Upload]

7. Click on **Upload File**
8. Click on Return

9. You will now see that the file has been uploaded to the Docs sub-directory

Configure Category and Product

For our example please follow Step 5 in the Selling Access to Learning Elements section above and create a category called Accord Storefront Manuals. Then follow step 6 above and create a Product called Accord Storefront Setup Guide.
Configure a Downloadable Product Variant

All Products are created with at least one Product Variant. You can create more but for this example we will edit the default variant created when the product was created.

Click on the Variant Tab

You will see the default (empty) Product Variant set up by the system. Click on Select.

You are now presented with a different set of tabs specific to the Product Variant you have chosen.

General Tab

1. **Product Name:** Enter a unique Product Variant Name.

2. **SKU:** Enter a unique product stock keeping unit #.

General Tab - Download File Section

3. **Link Type:** Select File (A File On Your Site).

4. **File Location Drop Down:** Click the down arrow and choose the location where you want previously uploaded the file to your site. In our example we used File
Manager to upload it to the Docs sub-directory.

5. **File Name:** Click the down arrow and choose the Filename that you wish to allow purchasers to access after checking out.

6. Click **Save variant**.

**Other Tabs**
Complete the other tabs, including Description, Pricing, and Gallery just as you would with any product variant you are creating. For examples see the previous section on crating product variants for access to learning products.

**Action Tab**

**Click on the Action Tab**

Information stored in the Action Product Variant Tab controls the access to the LMS. This code is run at time of checkout. Click on **Custom rule**. To enter the code into the Action Panel you will need to be in the "source" mode of the Action Tab. To enter the Source Mode click on Source at the bottom of the Action Panel.

The XML code that grants access to leaner roles is kept here. In the example below you will see a set of statements that grant the Rev_Downloads role to the purchaser. The actual role grant is provided by these statements:
1. **Place order Action Rule:** Copy and paste the text below to grant the purchaser the role of Rev Downloads at the time of checkout.

```xml
<xsl:template match="/" version="2.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
  <out>
    <setData>
      <salesOrder>
        <status>4</status>
        <salesPaymentStatus>2</salesPaymentStatus>
        <shippingStatus>3</shippingStatus>
      </salesOrder>
    </setData>
    <grantSecurityRole>
      <roleName>Rev Downloads</roleName>
    </grantSecurityRole>
  </out>
</xsl:template>
</xsl:transform>
```
Click **Save variant**

Click **Save**

**Note:** These are the only Tabs and fields we will be setting up for this basic product setup.

**Advanced Option - The Availability Tab**

At either the product of variant level you can limit the availability of a product or even a variant. The availability tab allows you to limit the visibility as well as the ability to purchase the product by geographic region or by role held by the customer. It should be noted that in the case of a geographic limit the location used is the one entered by the client as their billing address. This means that a product would be visible but not available for purchase when a new user enters a billing address outside of the geographic limit.

To limit by location select the Availability Tab:
1. **Select Basic Rule** from the drop-down menu

2. **Region Match**: Select either **Allow all except Selected** or **Allow only** those listed below

3. Click **Add new**

![Region Match Selection](image)

4. Select the **Country, State/province of zip code**

5. Click **OK**

Products will only be available to those customers whose billing address is either included or excluded in the areas selected depending on the Region Match option chosen.

You can limit the availability by the roles that a customer has.

1. **Role match**: Select either **Allow all except selected** or **Allow only those listed below**
2. Select the **roles** you wish to exclude or include depending on the Role match option selected

**Save your variant or product**

![Image of product variant settings]

**Selling $0 Products**

You will need to remember to put a $0 price on the product variant that you wish to sell for 0 dollars.

In addition, you will need to select the payment method of “None” in the Payment Methods of the General Settings for the Store Administration Module. You will also need to add code to its checkout availability rule as described below. By selecting “None” and adding the below rule you are telling Revindex that if the product is listed at $0 then the credit card billing panel should not be shown.

The billing address will still be verified even though no payment will be required nor will there be any way to enter a credit card number.
From the Store Admin Module choose:

**Configuration > Settings > Payment Methods**

1. Under the "None" section **Check the Enable box**
2. From the Availability rule drop-down **Select Basic**
3. **Enter 0.00 in the Min total amount**
4. **Enter 0.00 in the Max total amount**

Now so that the "None" payment option will not show up in the billing and shipping address for products that cost money the Credit Card Payment Method will need to be changed.

1. Expand the Credit Card Section by clicking on the **Up Arrow**.
2. From the Availability rule drop-down **Select Basic**
3. Enter 0.01 in the Min total amount

Click Save at the bottom of the screen to save your payment methods.

Testing & Completing your Purchase
Test the final store configuration and payment gateway connection to ensure everything is working as expected.

Payment Gateway and SSL setup are not discussed in this document. Please refer to the Revindex Storefront Users Manual for detailed instructions.

Recommended steps to user test final configuration:

1. **Purchase a Product in “Live” mode:** Follow all the checkout steps from entering an order to going through the final Secure payment form.

2. **Verify the order has been placed:** Return to the “My Account” page (My Account > Manage Orders) to ensure the order is listed.

3. **Check the status of the “Paid” order.**

4. **Verify that the applicable Role has been added to User’s account.**

5. **Check receipts and notifications after order have been processed:** Ensure the store has sent the order receipt to the client and that the corresponding notification from the store has been received.

6. **Verify that the eLearning folders can be accessed:** Check that the proper eLearning Folders and their associated content have been added to User’s My Plan.

7. **Verify that the presentation and workflow:** The process should be easy to understand, produce expected results and be pleasing to the eye.

Quick Links at Checkout
It is possible to allow a customer to access the content they purchased immediately after checking out by clicking a link on their confirmation page. To do this we will add a html module to the confirmation page. We will control the visibility to the module and therefore access to the content purchased by making the module available to those who have purchased content or downloads.

1. Navigate to Admin > Page Management to display a list of pages for the site.
2. From the Page List Choose the Confirmation Page.

3. Right Click on the Confirmation Page and Choose View Page.

4. Make sure you are in Edit mode.

5. Choose Modules from the top menu and choose Add New Module option.

6. Select the HTML module from the drop down and click on Add Module.

7. Click on the Pencil Icon next to HTML Module just added to edit the settings for this module.

8. The settings menu for the HTML module will now be displayed. Enter a Module Title. In our first example we will enter Quick Access My Courses.

9. Then click the tab labeled Permissions next to the drop-down box labeled Filter by Group to display other Groups.

10. From the drop-down box choose the role group we have previously created containing the roles we wish customers to purchase. The roles associated with the chosen Role Group will now display. In our example choose Acc_Training and click the box under View Module until it has a green check mark. This will make this module visible to those who have purchased training from the store and who have been granted that role.

11. Uncheck the box labeled Inherit View permissions from Page.

12. Click on Update at the bottom of the page. The page will refresh.

13. Click on the Pencil Icon next to the HTML module you have installed on the page.

14. This will allow you to edit the modules displayed text. Type in something like "Quick Access : My Courses". Highlight the words "My Courses" and click on the Link Manager Icon.

15. This will bring up the Hyperlink Manager box. Paste a link to the "My Courses" page into the text box labeled URL. Select OK.

16. Select Update at the bottom of the page.

Customers who purchase training and are granted that role on check out will now see a Quick Access: My Courses link on the confirmation page. This link will take them to the courses they purchased.

Follow the same instructions to add a Quick Access Link for those customers who purchased a download. You will need to select the role of “Acc_Downloads” in the HTML module you add to the
bottom of the confirmation page. You can use the text "Quick Access: My Downloads" and paste the url for the downloads page into the Hyperlink Manager. Your confirmation page will then display both links on the confirmation page.

**Note:** If you have placed the Accord LMS Learner module on another page or named the page something different, make sure to use the correct page name along with the applicable link path that corresponds to it. You can get this information easily by going to your LMS’ My Courses > My Path page and copying the URL from the browser’s address line to use Hyperlink Manager.

**Other Settings**
Many settings are optional in the Accord Storefront. This manual addresses only those that affect the ability to sell roles and downloaded products. In addition to the instructions above the Store Administrator should ensure that settings outlined in the Revindex Storefront Manual. The following is an example of how to setup your store name and address.

```
Admin > Store Admin > Configuration > Settings > General
```

The payment Gateway and Payment Methods accepted by your store should be set using the Revindex Manual Instructions and your Merchant Account codes or PayPal Account information and Signatures. These settings will vary depending on what Payment Gateway Provider you have selected.