Basic Guide - B2C Project Implementation

VTEXbook

VTEX

The True Cloud Commerce™ Platform

Third Edition

Third Edition (December 2019)
This edition applies to VTEX The True Cloud Commerce Platform

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Third Edition (2019)

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Thanks to the following people for the invaluable advice and guidance provided in the production of this document:

Érick Herrera
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PREFACE

This pinkbook provides information to facilitate the implementation of an affiliate commercial model at VTEX. It contains a description of the VTEX functions that are customized and used....

This book is intended for system specialists who will evaluate the product s possibilities and for systems programmers who will plan for, install, and customize the product. The concepts of TCP/IP for MVS and the tasks required to make the product operational are illustrated by numerous practical.

INTRODUCTION

This VTEXBOOK addresses the Shopkeeper's journey during the implementation of the e-commerce project using the VTEX platform.

The focus is on the key requirements the project must meet in order to have all the necessary functions implemented on the platform.

The goal is to understand the Shopkeeper role, the VTEX functions that need to be parameterized, the activities performed during the project and, finally, to know the risks and establish the strategies to have a fluid and consistent e-commerce implementation.

VTEX Project Implementation:

Once the VTEX platform is hired, there are a number of operational processes that must be performed before basic e-commerce functions can be published and used online.

The implementation project consists of the following steps:

i. Organize the necessary information.
ii. Parameterize platform features.
iii. Register as needed.
iv. Approve what was done.
v. Ensure everything is working within the VTEX platform for online operation to begin.

Key Implementation Requirements :

The main requirements for the e-commerce implementation are:

i. Training.
ii. User registration.
iii. Payment Services.
iv. Freight Services.
v. Category and Filters Registration.
vi. Product Registration.
vii. Email Settings.
viii. Promotions.

ix. Layout.
x. Google Tools.
xi. Domain Parameterization.

VTEX Approved Partners - Agencies:

It is recommended to have the implementation done by a VTEX approved partner:

http://store.vtex.com/agencias/implantacao-de-layout/

Today the platform provides an ecosystem of over 200 certified and approved partners. They are commonly known as Agencies, and have been trained and certified by VTEX. And that's why they have all the technical guidelines to carry out projects in conjunction with the Shopkeepers. The role of the VTEX Approved Partners, as a service provider, is to create and implement layout, to instruct the Shopkeeper regarding the project's needs and mainly to enable the E-commerce operation.

All project needs should be addressed to the partner, who will then provide a contract based on the scope.

Image 01 - Partner

Shopkeeper Responsibilities :

The shopkeeper is the key to the implementation process. Although the approved partners have the technical knowledge to carry out the necessary tasks, the shopkeeper has to:

i. Provide creative material (logo, branding).
ii. Approve layout.
iii. Contract the platform and the partner.
iv. Establish the project needs based on your business rules.
v. Hire third party services to be implemented (shipping and payment, for example).
vi. Be responsible for all the information about the products.
vii. Approve the project with the partner.
viii. Absorb the knowledge needed to manage the e-commerce using native platform features.

It is very important to have an alignment between the shopkeeper and the agency so that all hiring, parameterization and validations can be done according to schedule.

Image 02 - Shopkeeper

1.1 Standard Schedule:

VTEX has a standard schedule made available to partners to be used as a implementation base. The length of tasks may vary depending on the project scope and methodology applied by the partner as well as specific customer needs.

Contract and Training:

Tasks	Resp.
Contract	
Contract Acceptance	Shopkeeper
VTEX CRM System Registration	Shopkeeper
Environment release	VTEX

Tasks	Resp.
Training	
Concepts, Logistics, Payments, Settings, and Basic OMS	Shopkeeper
Operations Management (Categories, Products, SKUs and Pricing)	Shopkeeper
Basic Marketing Management (Promotions, Portal, Banners and Collections, Advanced OMS)	Shopkeeper

Standard Schedule - Accounts / SMTP e SPF:

Tasks	Resp.
ACCOUNTS	
Register password for first login	Shopkeeper
Create new users	Shopkeeper
Create Access Profiles	Shopkeeper

Tasks	Resp.
SMTP E SPF	
Configure SMTP	Shopkeeper
Configure SPF in DNS Manager	Shopkeeper

Standard Schedule - Payments & Logistics:

Tasks	Resp.
Payments - Choose and configure the connectors	
Gateway and Card Acquirers	Shopkeeper
Bank slip	Shopkeeper
Intermediator	Shopkeeper
Anti Fraud	Shopkeeper
Set up notifications (such as a chargeback)	Shopkeeper

Tasks	Resp.
Logistics – choose and configure the logistics scenarios	
Register inventory	Shopkeeper
Register dock(s)	Shopkeeper
Register carrier(s)	Shopkeeper
Prepare spreadsheets of carriers freight and delivery time	Shopkeeper

Default Schedule - General Settings:

Tasks	Resp.
General Settings - e-commerce	Shopkeeper
System	Shopkeeper
SEO System	Shopkeeper

Standard Schedule - VTEX Manager External Configuration":

Tasks	Resp.
Access data for Google and Facebook Conect	Shopkeeper
VTEX Manager External Configuration	Shopkeeper
Share Google Analytics account with "sistema@vtex.com.br"	Shopkeeper
Set up sales funnels in Google Analytics	Shopkeeper
Set up Google Tag Manager (GTM)	Shopkeeper
Share "sistema@vtex.com.br" with GTM	Shopkeeper
Set up Google AdWords with GTM	Shopkeeper
Set up E-bit script with GTM	Shopkeeper
Set up Google Analytics with GTM	Shopkeeper
Set up Google Webmaster Tools	Shopkeeper
Share Webmaster Tools account with "sistema@vtex.com.br"	Shopkeeper
Access data for Google and Facebook Conect	Shopkeeper

Standard Schedule - Categories:

Tasks	Resp.
Categorization	
Categorization	Shopkeeper
Plan category tree	Shopkeeper
Plan product attribute groups and SKUs	Shopkeeper
Register Product and SKU Category Tree, Groups, and Attributes	Shopkeeper

Standard Schedule - Products & Images:

Tasks	Resp.
Products	
Products	Shopkeeper
Register brands	Shopkeeper
Register products (manual, spreadsheet or webservice)	Shopkeeper
Change product listings and SKUs (Meta tag , Title,...)	Shopkeeper

Tasks	Resp.
Images	
Prepare product images in high definition (1000 x 1000 px, 200kb maximum)	Shopkeeper
Publish product images to an FTP	Shopkeeper
Prepare and import the Image Import Worksheet	Shopkeeper

Standard Schedule – Additional Registration:

Tasks	Resp.
Additional Registration	
Import redirect spreadsheet 301	Shopkeeper
Update CPC Campaigns	Shopkeeper
Create XMLs for Partners	Shopkeeper
Register final promotions	Shopkeeper
Register final product collections	Shopkeeper

Standard Schedule:

Tasks	Resp.
LAYOUT	
Apply HTML, CSS and JS layout	Agency
Layout Notification Emails	Agency
QA and Settings	Agency
General Validations	Shopkeeper
Make final adjustments	Agency
Perform final approval	Shopkeeper
Register final banners	Shopkeeper

Standard Schedule - Layout & Development:

Tasks	Resp.
LAYOUT	
Create Main Pages (Home and Products)	Agency
PSDs and JPGs layouts creation	Shopkeeper
Conduct layouts review and forward considerations	Shopkeeper
Make adjustments to layouts	Agency
Approve layouts	Shopkeeper
Prepare institutional texts	Shopkeeper
Write institutional texts	Shopkeeper
Send all texts to the agency	Shopkeeper
Create other pages	Agency

Standard Schedule- Integration:

Tasks	Resp.
INTEGRATIONS	
ERP x VTEX	
Integrate Test Communication via SOAP and REST Technologies	ERP
Products Integration (Soap)	ERP
SKUs Integration (Soap)	ERP
Pricing Integration (Rest)	ERP
Stock Integration (Rest)	ERP
Orders Integration (Rest)	ERP
Invoices Integration (Rest)	ERP
Tracking Integration (Rest)	ERP
Connect / flip database for production	Shopkeeper
Configure Scheduling Routine	ERP
Perform the validations of the integrations	Shopkeeper
Make fine adjustments to integrations	Shopkeeper

Standard Schedule - Tests & GO LIVE:

Tasks	Resp.
Run Agency / Client Test	Agency / Shopkeeper
Vtex / Agency Validation	Agency
Perform final adjustments	Agency
Final Validation	Shopkeeper

GO LIVE	
Perform DNS entry and generate certificate (Preferably on Mondays or Tuesdays)	Shopkeeper
Register New Sitemap on WebmasterTools	Shopkeeper
Hire N1 Service	

Standard Schedule - Closing:

Tasks	Resp.
Validate if all tasks are completed on schedule	Agency
Go into Production (License Manager>Accounts)	Shopkeeper
Run the Trigger in Production	Shopkeeper

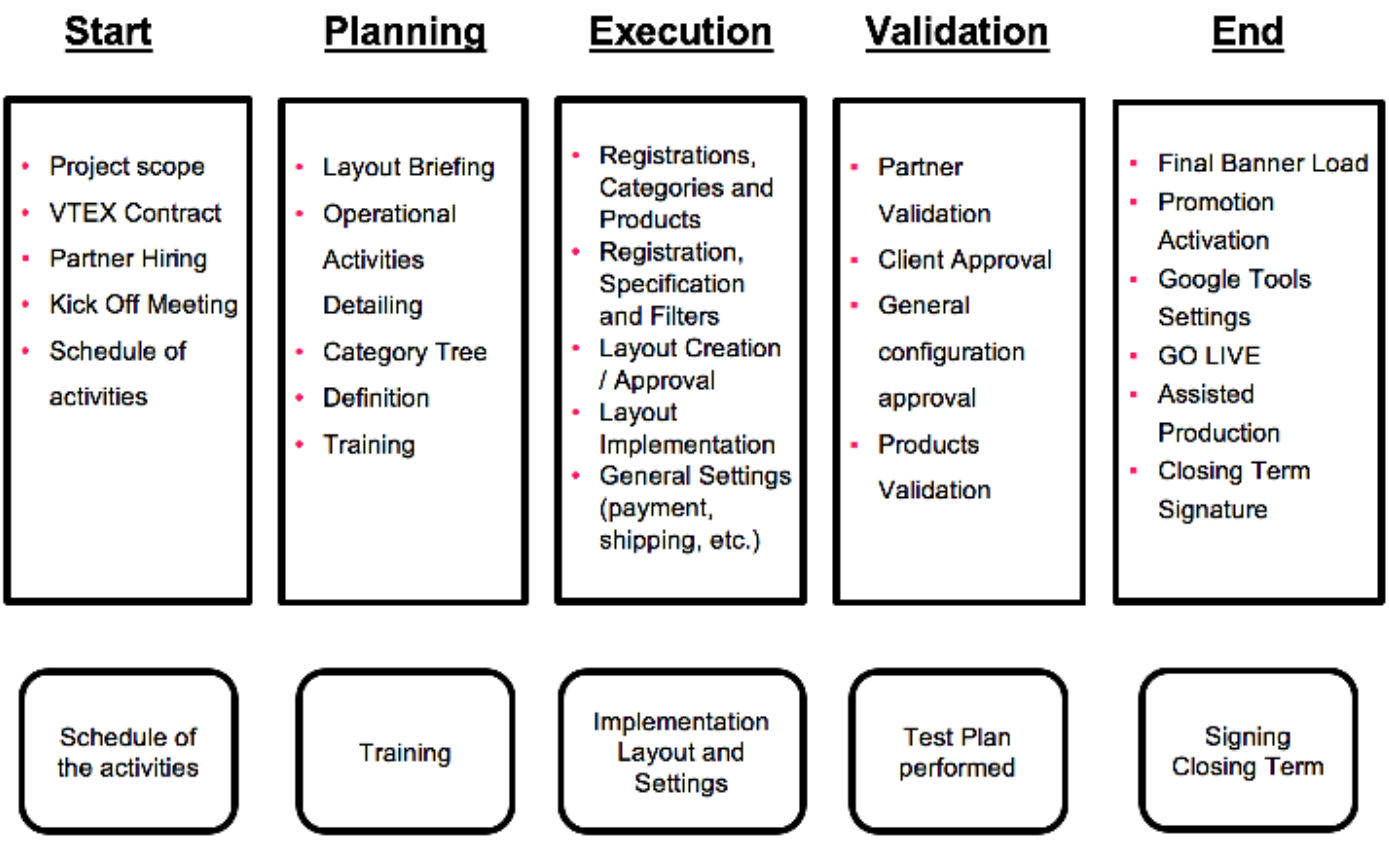
GENERAL 2

In this topic, on a project management level, the main phases and deliverables will be covered, as well as the project risks, training, layout, institutional brand and the registration planning.

2.1 Project phases:

Every project consists of phases, activities and deliverables, according to what has been agreed between the shopkeeper and the partner in the project scope.

The scope of the project may vary according to the business needs of each company. The phases and activities outlined below apply generally to most projects:



2.2 Main Pages:

i. Home: the e-commerce gateway often provides product carousels and promotional banners, menu, search and mini cart.

ii. Category: segments products by specific sales sector, for example: t-shirts, pants, and caps.

iii. Product: this page show to the user what the brand actually offers for consumption.

iv. Cart: The summary of the order.

v. Checkout: where the user have all the information required to close the purchase. Order Placed: known as the thank you page when an order is placed.

vi. Search: page where the search terms are returned.

vii. Account: user profile and purchase information.

viii. Institutional: content page, usually text and image.

ix. 404 and 500: Error Pages.

2.3 Institutional Texts:

It is recommended that the shopkeeper writes or contracts a service to create the e-commerce institutional texts.

These texts are usually located in the toolbar at the bottom of the page so that the buyer can easily access them.

Some commonly developed texts are:

i. Who we are
ii. Exchange and Returns Policy
iii. Payment Policy
iv. Delivery Policy
v. Our stores
vi. Security policy

2.4 Registration Planning:

The shopkeeper has available on the platform a panel so that all necessary entries for navigation and sale of products can be performed. These entries are:

i. Brands.
ii. Categories.
iii. Subcategories.
iv. Groups.
v. Product Specifications.
vi. Product Variation (SKU).
vii. Product SKU.

Based on the instructions of the partner, the shopkeeper must carry out the registrations planning, providing all the information to be available, such as categories, products and specifications, and the filters and variations that these products have.

It is recommended that the planning be done before in a spreadsheet, so that later it can be assertively registered in the VTEX platform.

2.5 Pages structure:

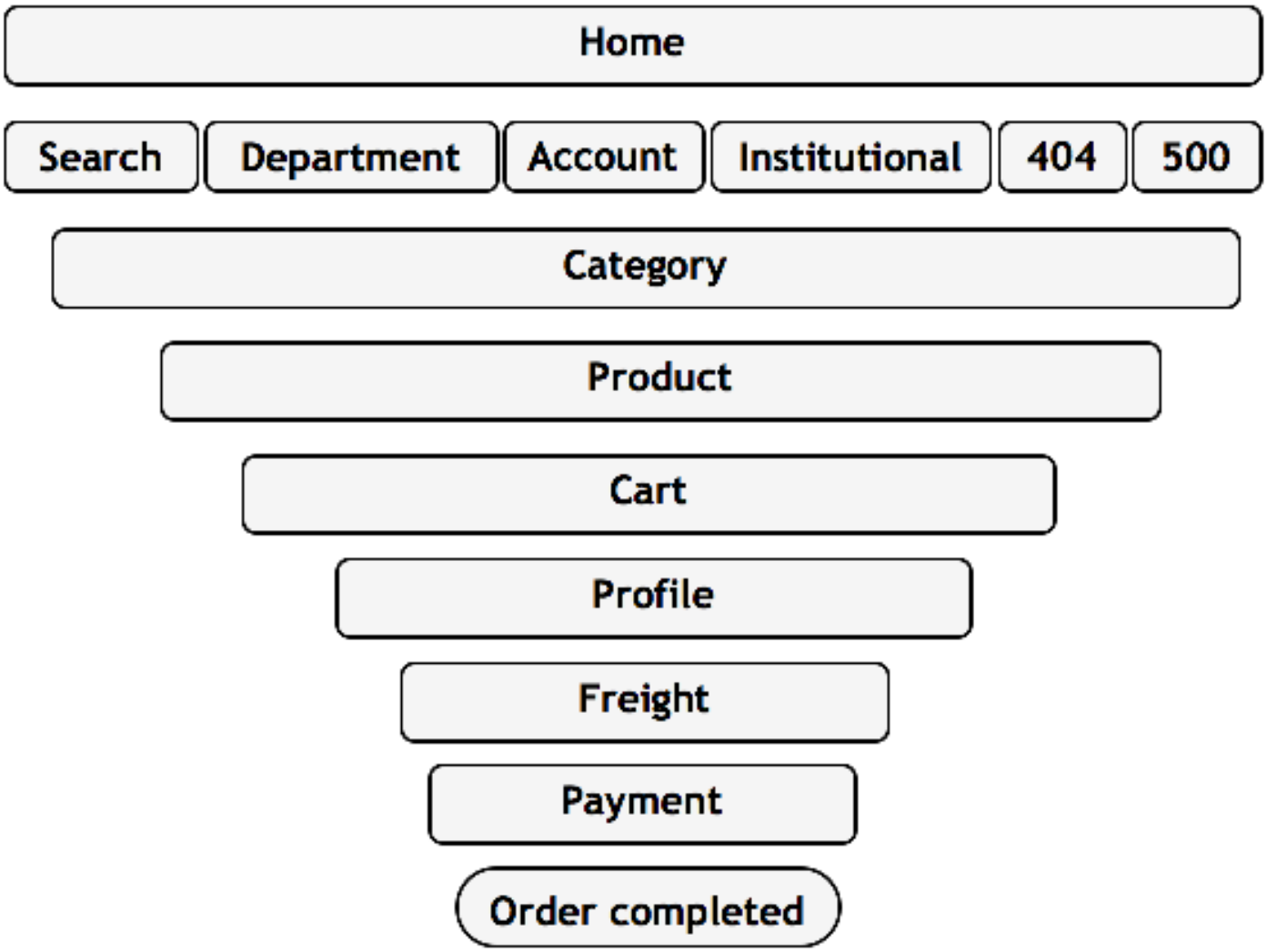


Image 03 - Pages

3

Hands-on

3.1 VTEX PLATFORM

The VTEX platform is a unified system that provides modules for e-commerce to be implemented and managed.

After hiring the platform, VTEX will send the Admin to the shopkeeper's email. This is the home screen :

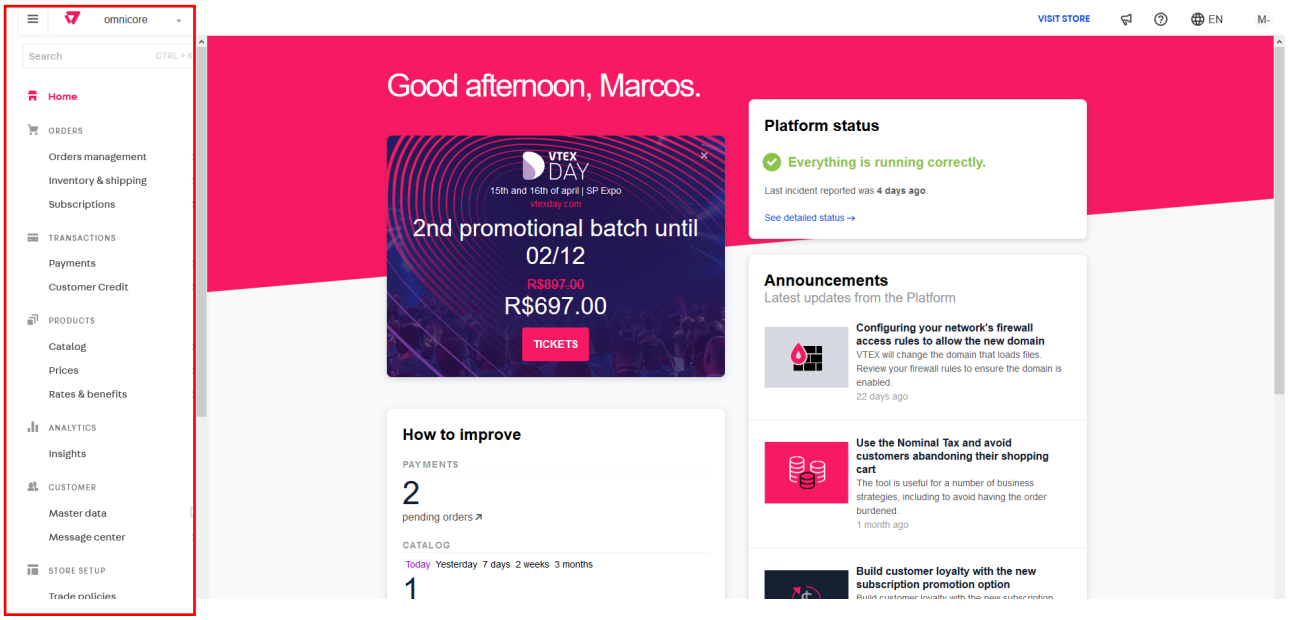


Image 04 - VTEX

See on the left side that we highlighted the area where the Platform Modules are, which are used for implementation and management.

Access to VTEX is via browser, i.e., you must type in your browser AccountName. myvtex.com/admin.

3.2 Account Management - Account

The general Account Data setting is the company legal information that must be completed in Admin Vtex. To configure general account data, the user must Access:

VTEX > Account Management > Account.

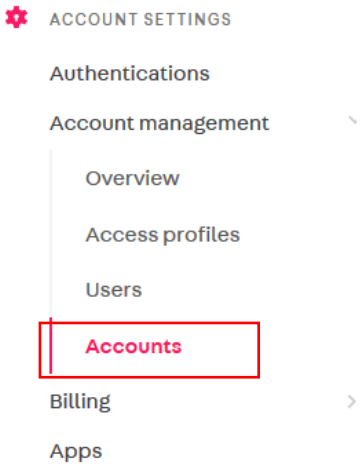


Image 05 - Accounts

Then the user must access the account by clicking on its name:

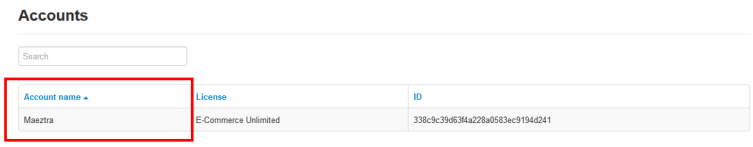


Image 06 - Users

3.3 Account Management - Account - Company Data

Trading Name, Company Name and Tax ID must be completed:

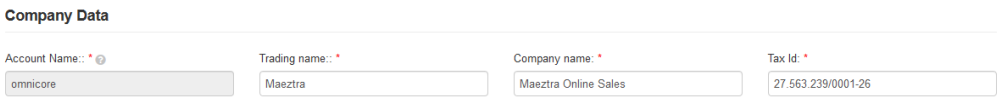


Image 07 - Company

i. Trading Name: the name by which your company is known.
ii. Company Name: is the corporate name of your company.
iii. Tax Id: is your FEIN (Federal Employer Identification Number).

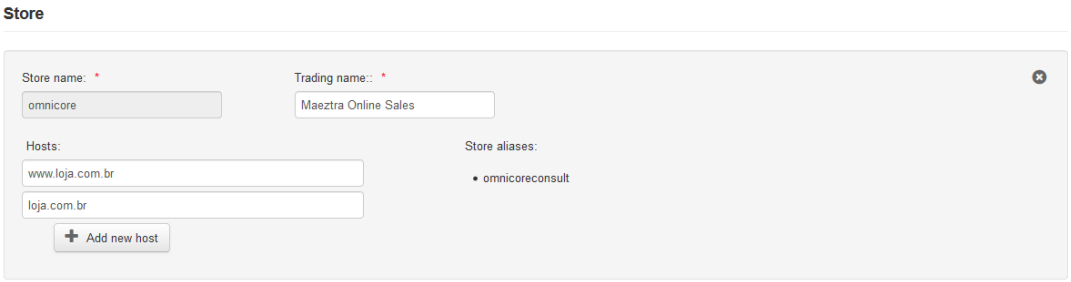


Image 08 - Store

i. LV: this field should not be filled.
ii. Trading Name: the name by which your company is known.
iii. Currency: must be completed with the currency in which payments will be accepted.
iv. Domain: fill in the domains that will be used to access the store, with www and without.

Important: The shopkeeper must contract a company that provides domains.

3.4 Store Setup

To access the VTEX General Settings area, the user must take the following path: Vtex > Layout > Settings

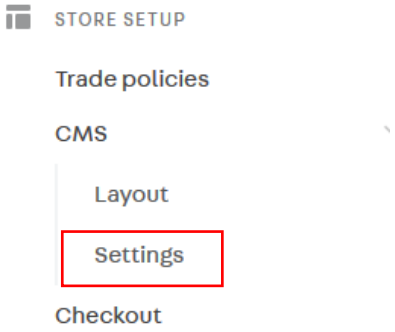


Image 09 - Store Settings

3.5 Store Setup - Settings - General

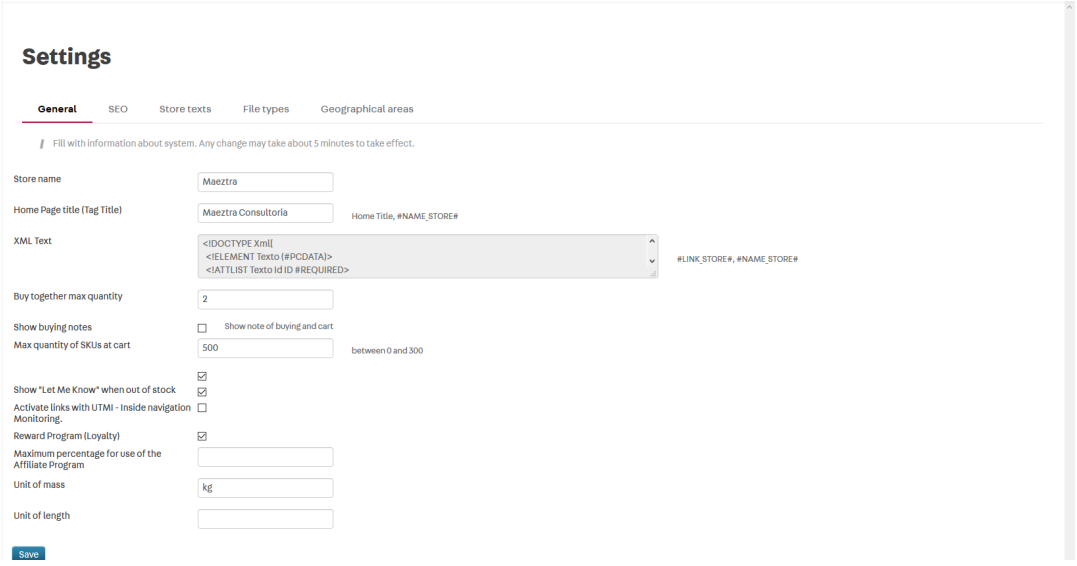


Image 10 - Store Setup

i. Store Name: name of the virtual store

ii. Home Page title (Tag Title): this is the name that will appear on the browser tab Max quantity of SKUs at cart: maximum quantity of the same SKUs at the same cart (recommended 5).

iii. Show “Let Me Know” when out of stock: displays on the product page the “Notify me when available” form for out-of-stock products.

3.6 Store Setup - Settings - SEO

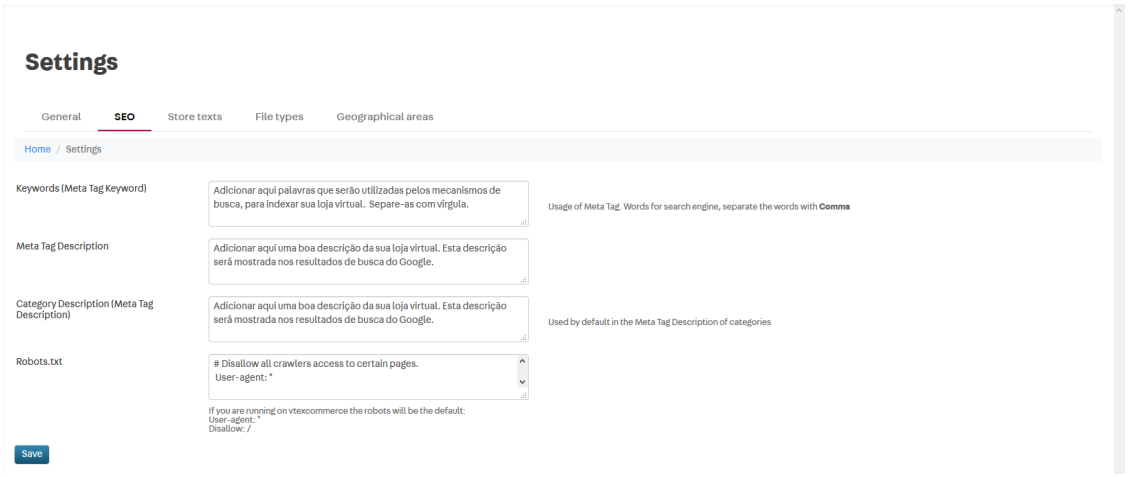


Image 11 - SEO

i. Keywords (Meta Tag Keyword): add here words that will be used by search engines to index your online store. Separate them with commas.

ii. Meta Tag Description: add here a good description of your online store. This description will be shown in Google search results.

iii. Category Description (Meta Tag Description): add here a good description of your categories. This description will be shown in Google search results.

iv. Robots.txt: this is the file that governs what searchers (Google) will read about your site. It is recommended to include the store name and also to have its configuration reviewed by the partner.

3.7 Account Management

This topic presents, on an operational level, how the shopkeeper makes access available to users in VTEX and how this access can be segmented according to user role.

The module is Account Management.

3.7.1 Account Management - Access Profile

Account Management is the module responsible for managing the access and the user profiles.

Access Profile is a set of modules and functions grouped together, so that a registered user can get access to some functions pertinent to what he /she will perform within the platform.

It is recommended that accesses granted to users contain only the functions they will perform. To perform the creation and management of Access Profiles :

VTEX > ACCOUNT SETTINGS > Account management > Access profiles:

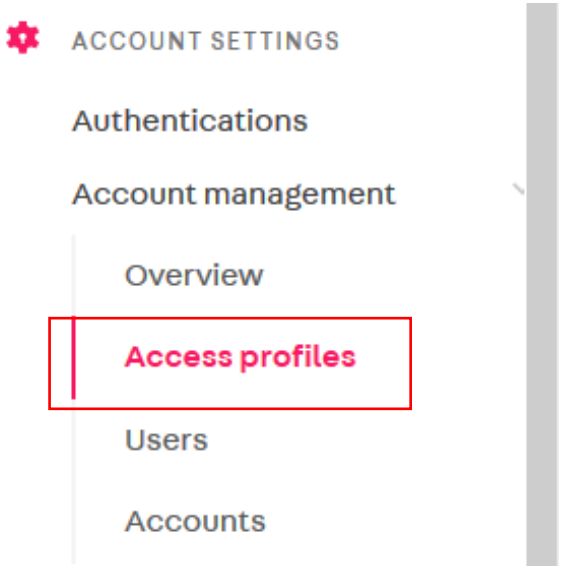


Image 12 - Access

VTEX has some predefined user profiles that can be used to perform this control. Some of them are:

i. Super Admin: store-wide access.
ii. Admin Portal: access that allow front-end editing
iii. Admin - Home: view the admin home page.

To create a new Profile, click “New User”.

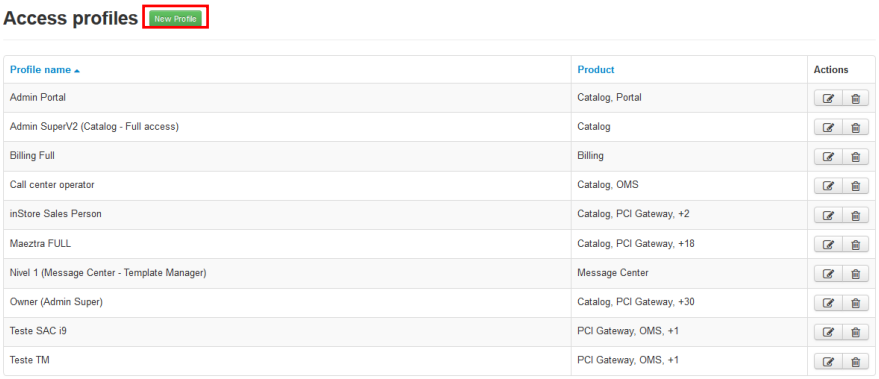


Image 13 - Profiles

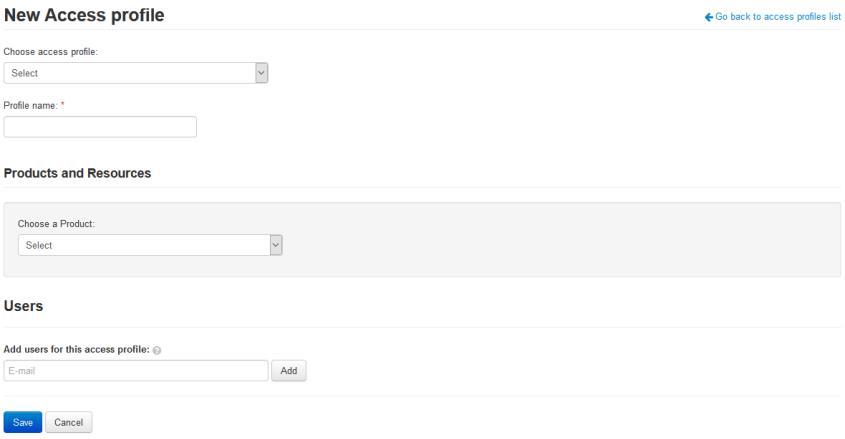


Image 14 - New Profile

i. Profile name: enter the desired profile name.

ii. Choose a product: select which module, feature and permission you want to make available to the user :

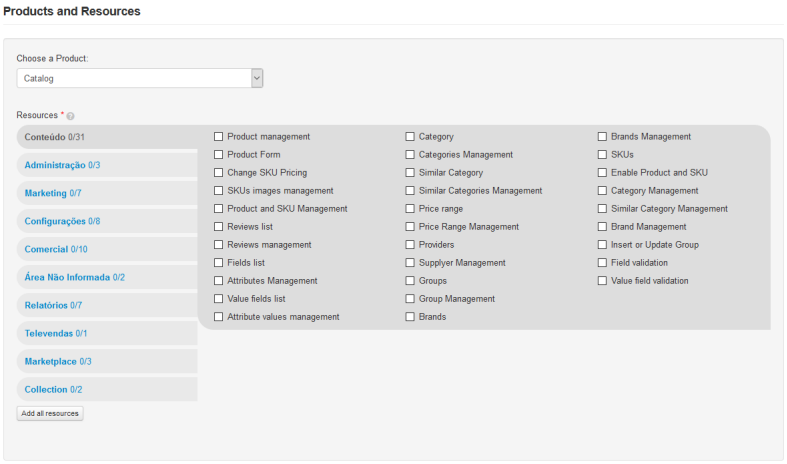


Image 15 - Profile

It is recommended that the users profiles be created only after training so that the users are knowledgeable about the modules, features and permissions. Click on “Save” so the User Profile can be saved.

3.7.2 Account Management - Users

To perform user creation go to: VTEX > ACCOUNT SETTINGS > Account management > Users:

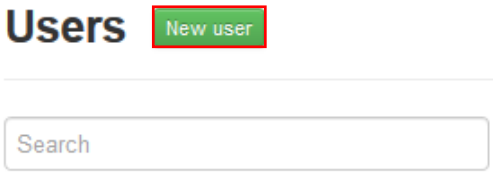


Image 16 - New User

To input new user go to:

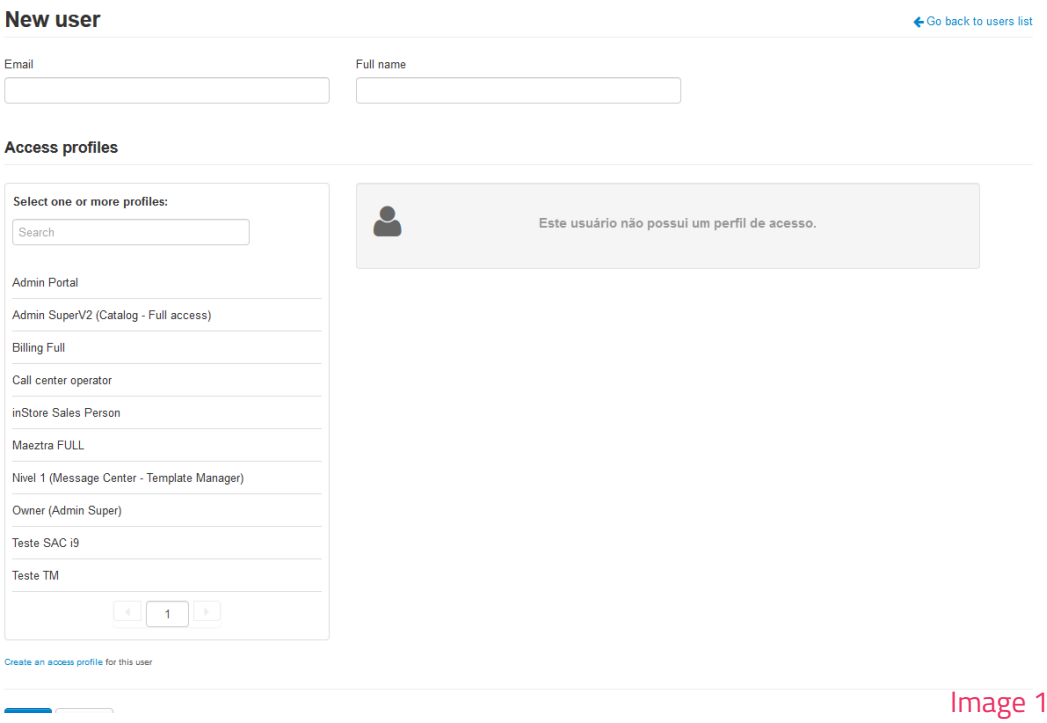


Image 17 - Save User

i. Email: user's email.
ii. Full Name: full name of the user.
iii. Access Profile: user access profile.

After clicking "Save", the user will receive an email stating that the access has been granted as well as the link for the VTEX environment.

3.8 Catalog

This topic discusses on an operational level how the shopkeeper will register the entire product structure. The interface provides forms so that brands, categories, products, specifications and variations can be registered. The registration order is:

i. Brand.
ii. Category.
iii. Group.
iv. Field (product).
v. Field (SKU).
vi. Product.
vii. SKU.

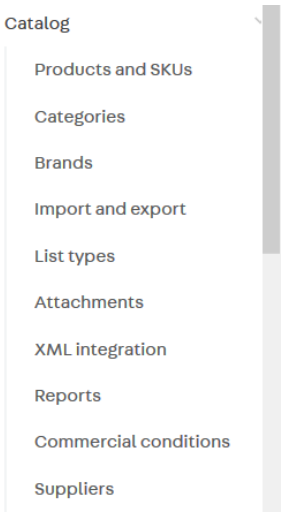


Image 18 - Catalog

3.8.1 Catalog – Brands

To register brands, go to “Brands” and then “New Brand”:

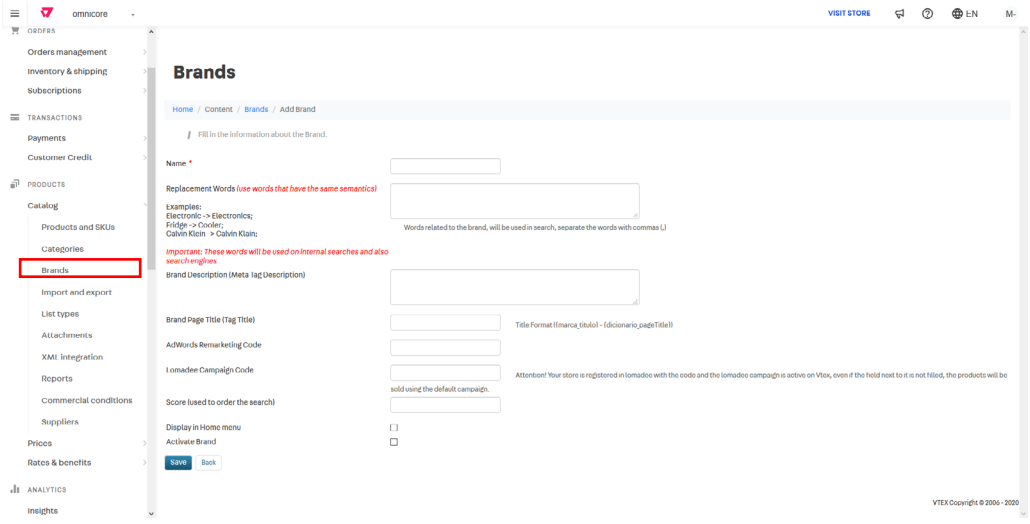


Image 19 - Brands

i. Name: name of the brand.

ii. Replacement Words: words used as similar terms or synonyms used to perform the search.

iii. Brand Description (Meta Tag Description): description of the brand used for search engines (eg Google)

iv. Brand Page Title (Tag Title) : tag page title, used for search engines and page tab title.

v. AdWords Remarketing Code: code used for Google Adwords campaign.

vi. Lomadee Campaign Code: code used for Buscapé campaigns.

vii. Score: value used to set the priority of the brand on the search result page. Display in Home Menu: the brand will appear in your store menu.

vii. Enabling brands: brands are visible and ready for use on registered products.

3.8.2 Catalog - Categories

Exemple:

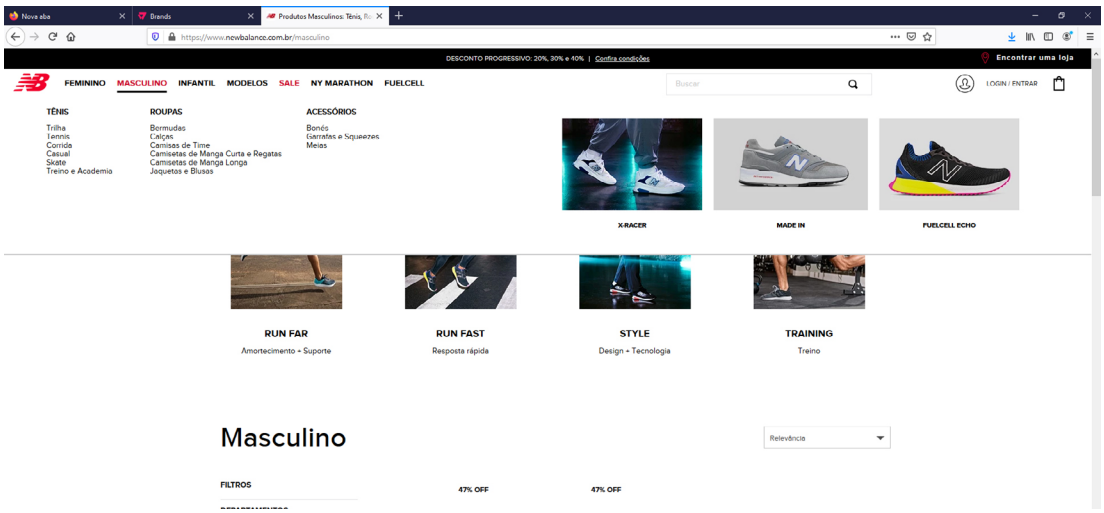


Image 20 - Menu

i. Department: the first level of the menu, in the example above “Male”.

ii. Category: the second level of the menu, in the example above, tennis.

iii. Subcategory: the third level of the menu, in the example above, running shoes.

In this module, the tree that was previously planned in excel must be registered.

To register Departments and categories, click Categories> Include

* For data integrity reasons, a department or category cannot be deleted manually after being created, only by completely cleaning the database.

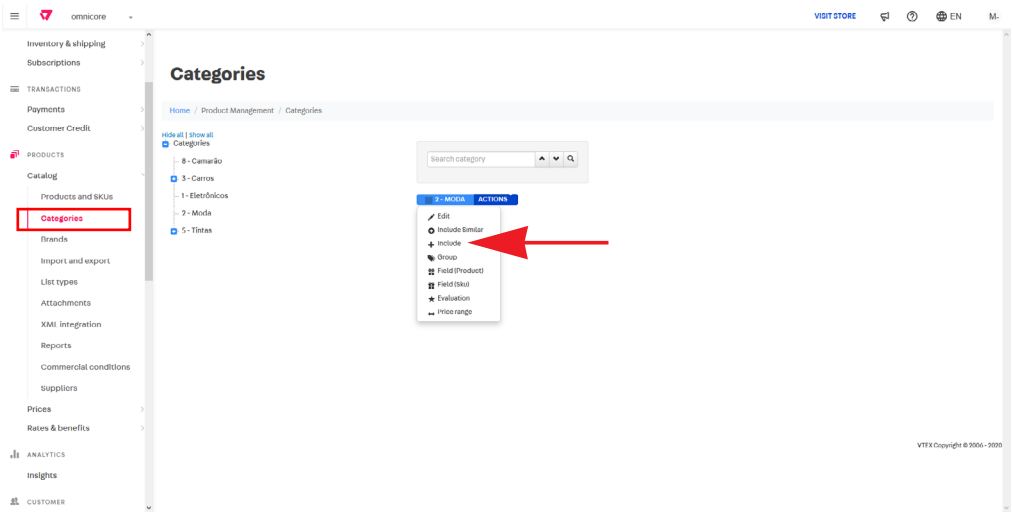


Image 21 - New Category

3.8.3 Catalog - Categories Content

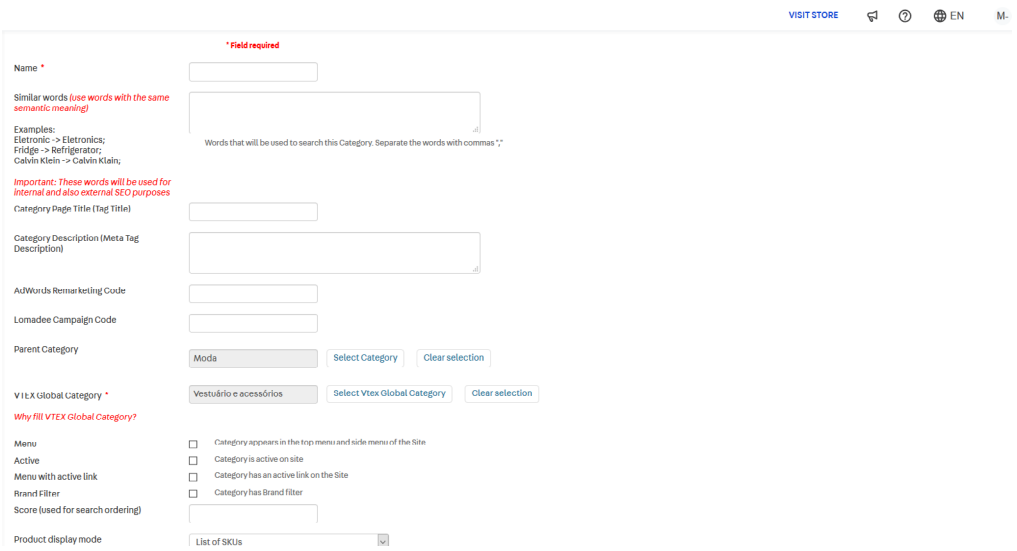


Image 22 - Category Content

i. Name: the name of the category on the site, also used to generate the URL that will be available in the menu.

ii. Similar words: synonyms or terms related to the name given to your department or category. Do not use special characters (eg *, #, $).

iii. Category Page Title (Tag Title): text that is in the browser tab and corresponds to the category page title.

iv. Category Description (Meta Tag Description): description used to display on Google when an user makes a search.

v. AdWords Remarketing: code used for Google Adwords campaigns (not required) .

vi. Lomadee Campaign Code: code used by Buscapé Campaigns (not required).

vii. Parent Category: enter the parent category if it is a subcategory (eg Shoes> Sneakers). If it is a department (first level, eg Footwear) the field must be blank.

viii. VTEX Global Category: category tree that will be used to integrate products with Google Shopping, Buscapé and marketplaces.

ix. Menu: the category or department will appear in the top menu and side menu of your store.

x. Active: when you select this item, the category or department is enabled or disabled in your store.

xi. Menu with active link: the category or department is active and clickable on the site for the customer to navigate through.

xii. Brand Filter: the category or department now can be filtered by brands.
Score (used for search ordering): value used to set the priority on the search result page.

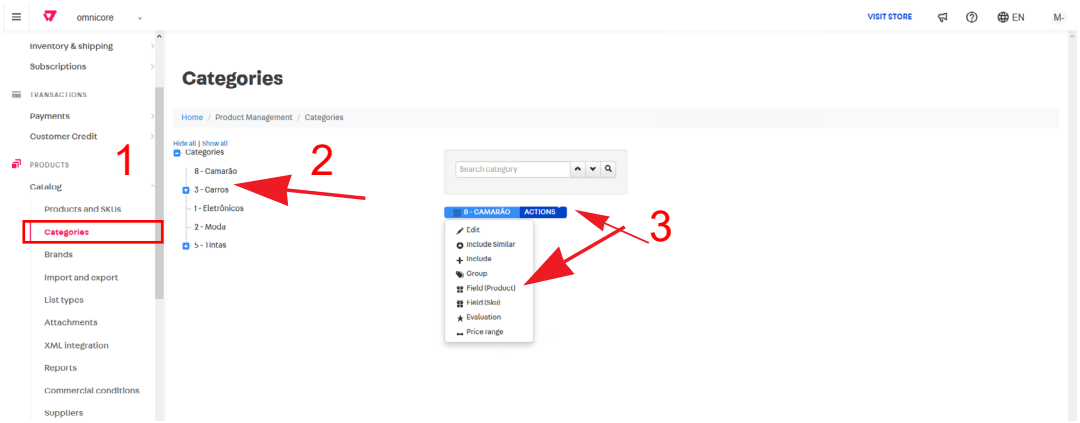
xiii. Product display mode: defines how SKUs will be displayed on the product page. "Following definition of the SKU specification" is recommended

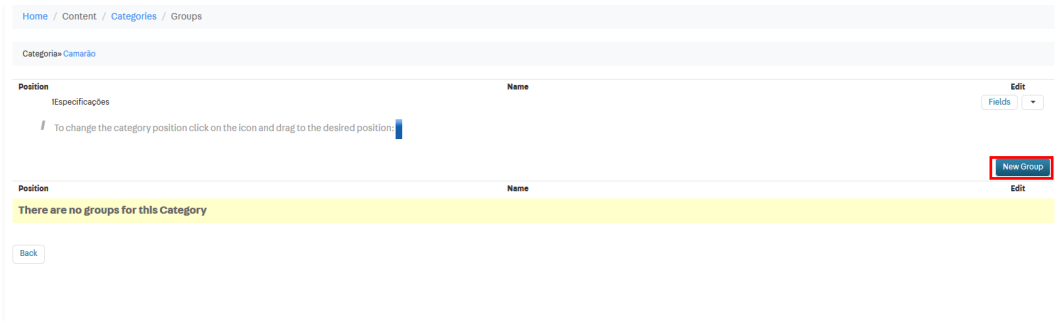
3.8.4 Catalog - Groups

Creating a Group within a category represents a set of definitions and characteristics about products and SKUs. Example:

i. Category: T-shirt.
ii. Group: piece care.
iii. Values: material, type, washing and drying recommendations.

To register: Categories > Group > New.





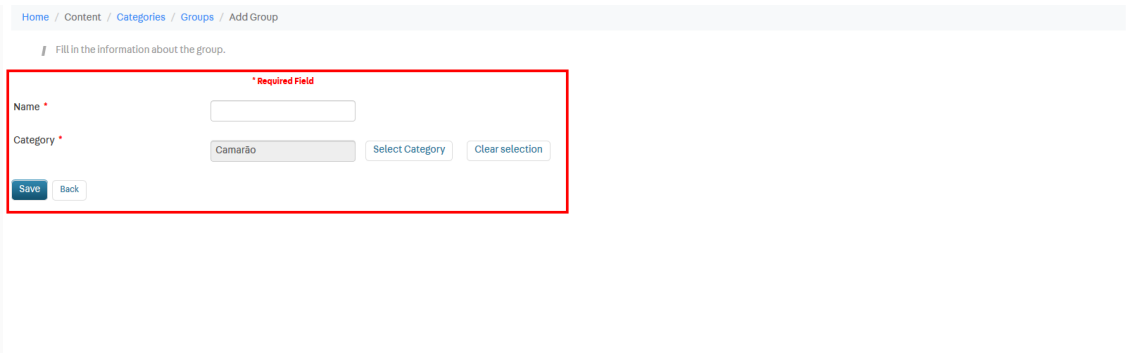


Image 23 - Category Configuration

3.8.5 Catalog - Product Specifications

Product Specifications are attributes that can be registered on products and / or SKUs. They are commonly used for both filters and extra product descriptions. Filter Example:

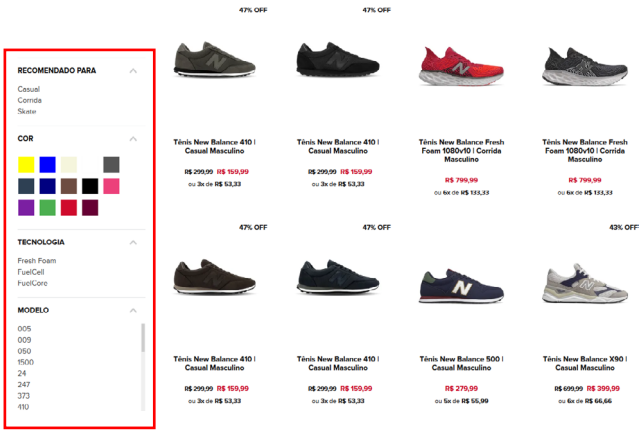


Image 24 - Filters

Example of Additional Descriptions:

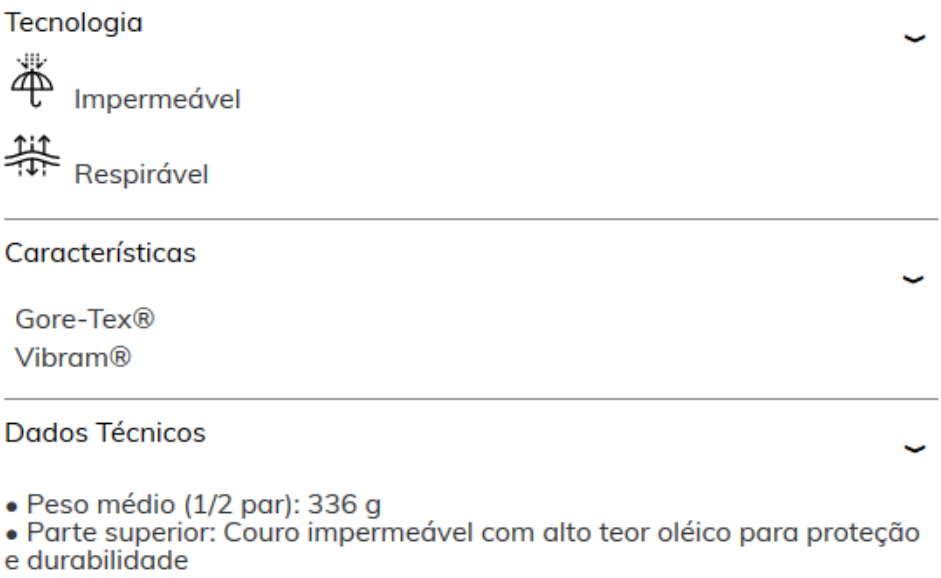


Image 25 - Description

To register, select the category, click on “Actions” and then “Fields (Sku)” or “Fields (Product)”:

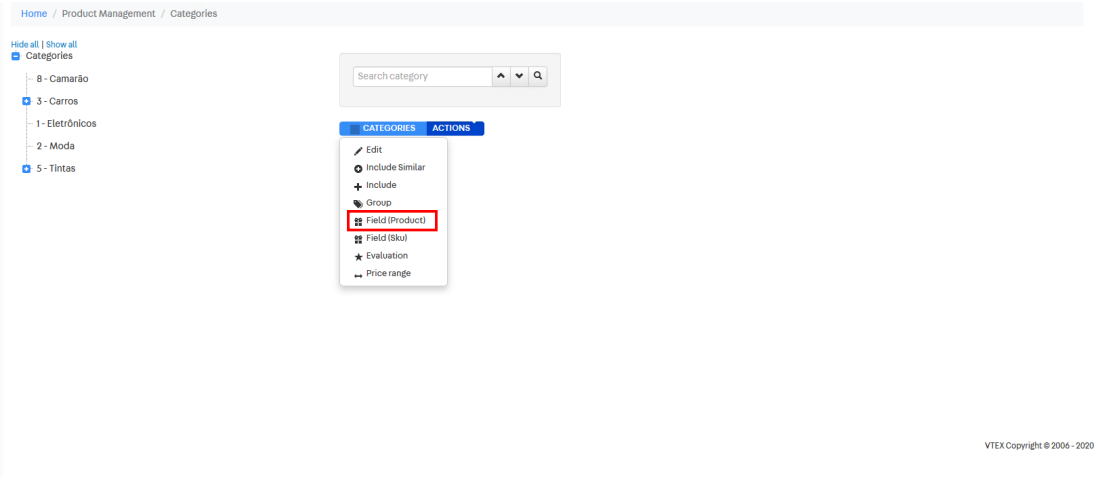


Image 26 - Painel Category

To register, select “New Field” and fill in the information:

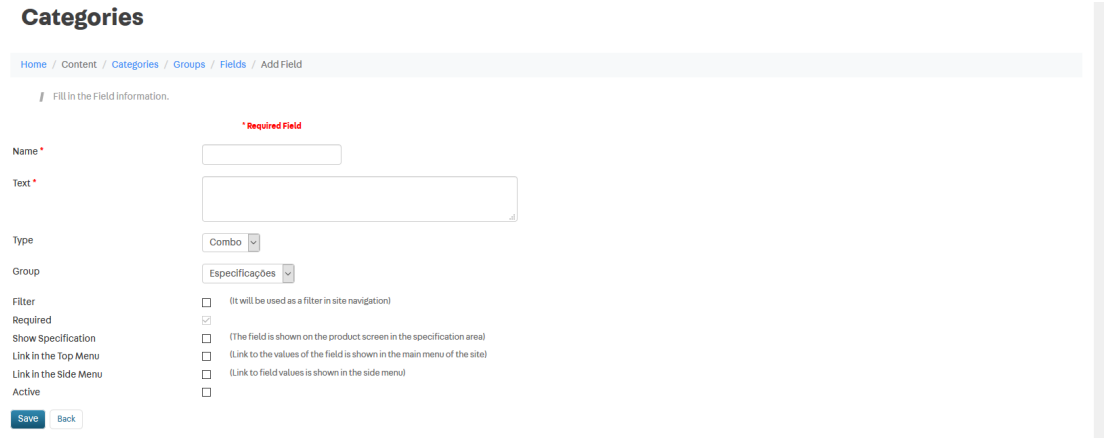


Image 27 - Save Category

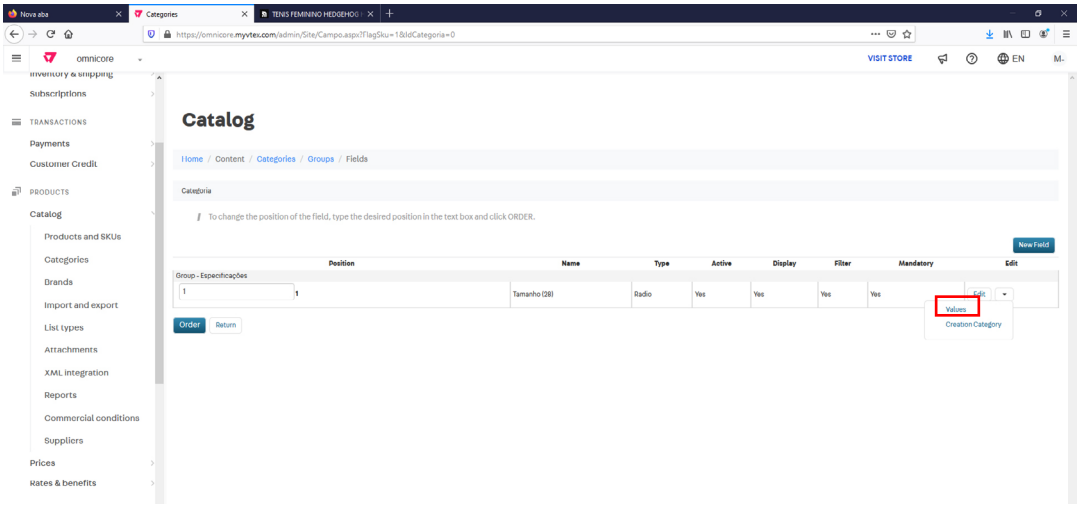


Image 28 - Field

i. Name: name of the field that is being created, available in the product register.
ii. Text: text to be displayed in the layout.
iii. Type: field type, which can be SKU only or SKU ratio.
iv. Text: a field to type a short text.
v. Large Text: a field to enter long texts.
vi. Number: a field to enter numbers.
vii. Combo: checkbox with predefined dropdown options.
viii. Ratio: single selection buttons, predefined options.
ix. CheckBox: multiple checkbox.
x. Indexed Text or Indexed Large Text: they technically follow the same rules as Text and Large Text fields (respectively), but the content will also be available for final customers searching on Google.
xi. Default Value: already defined at field creation (does not appear for Radio, Combo or Checkbox).
xii. Group: name of the previously created group.
xiii. Filter: will be used as a filter in the site navigation.
xiv. Required: even if the value is optional, SKU fields will always be required.
xv. Show Specification: this field is shown on the product screen in the specification area.
xvi. Link in the Top Menu: link to field values is shown in the main menu of the site.
xvii. Link in the Side Menu: link to field values is shown in the side menu. Active: enter or remove this field in product registration.

The “Combo”, “Radio” and “Checkbox” field types require predefined values to be activated. To register, go to:

Categories > Product/SKU Fields > Values:

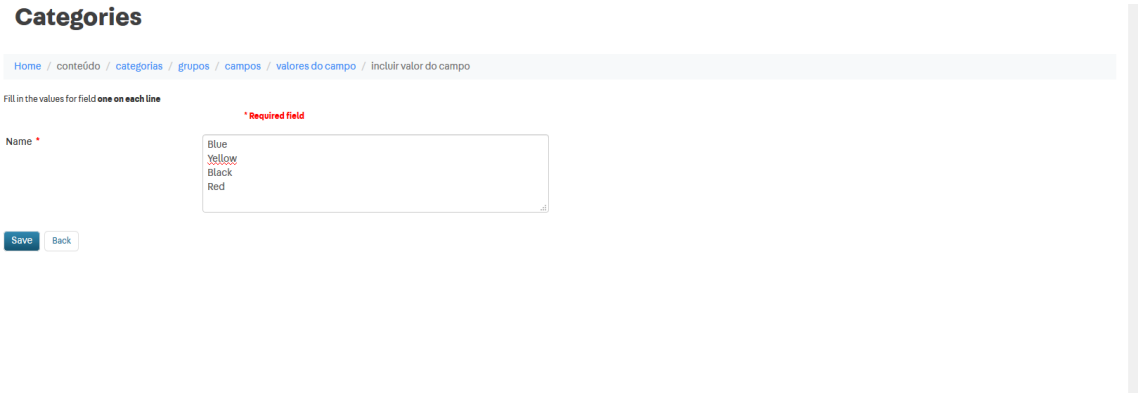


Image 29 - Values

In “Values”, enter “New Value” and then fill in the field. In the print below an example showing how the mass registration of values is done. Exemple:

Product Specification: ColorType: CheckboxValues: Blue, Yellow, Red, Pink.

3.8.6 Catalog - Products and SKU’s

After performing all platform pre-registrations (department, category, brand, group and specifications), we have all the information needed to perform the product and SKU registration.

In the VTEX platform, we define product as being the registration in the catalog for marketing purposes, and the SKU the information to be used in sales. One single product can have N SKUs.

Image 30 - Product page

To register products, go to: Catalog> Products and SKU's> Add Product:

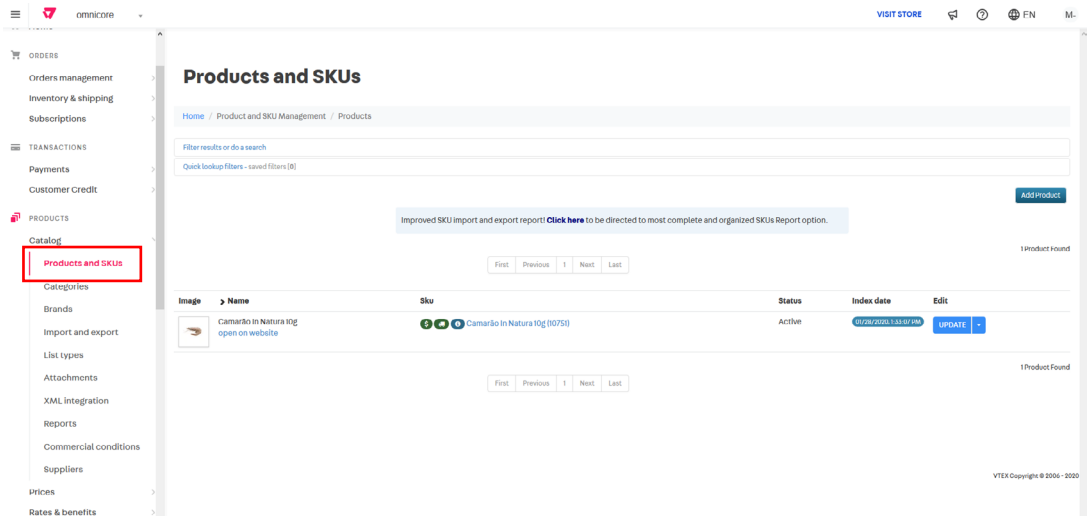


Image 31- Product and Skus

To create a new product, select "Add Product" and fill in the fields for product registration:

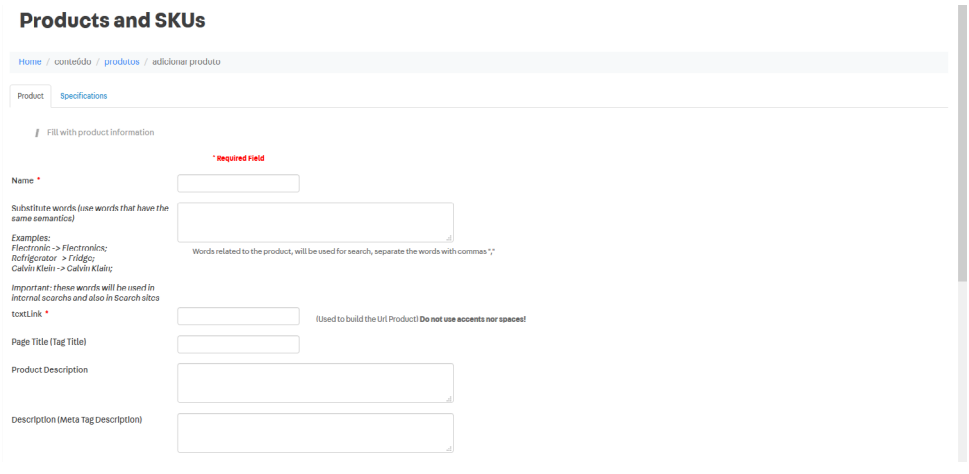


Image 32- New Products

i. Name: product name to be displayed on the site.

ii. Substitute words: keywords, terms related to the name given to be used in the store search.

iii. TextLink: product URL.

iv. Page Title (Tag Title): text that is in the browser tab and corresponds to the product page title.

v. Product Description: description of the most important information about the product.

vi. Description (Meta Tag Description): short description of the category. It's recommended not to exceed 150 characters so that search engines can display it correctly on the result pages.

vii. Brand: type or search for the brand name then add it to the register. Category: select the category to which the product belongs.

viii. Global Category VTEX: category tree that will be used to integrate products with Google Shopping, Buscapé and marketplaces.

ix. Trade policies: check what trade policies this product is ruled by. If this field is not marked, the platform understands that the product can be ruled by all of them.

x. Provider: enter or search for the name of the provider to add it to the register.

xi. Market Launch date: the date when the product was launched. It serves to search for the latest releases on the page.

xii. Show on site: turns on or off the visibility of a product in your store.

xiii. Show out of stock: this function makes a product, even when sold out, appear in your store, and provides a back in store notification form for the customers.

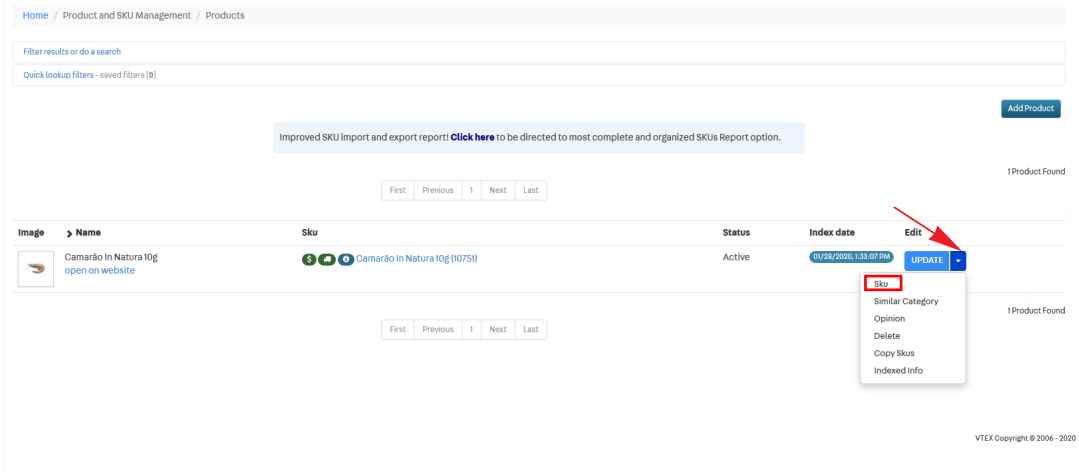
xiv. Additional Description: short description of the product.

xv. Tax Code: product reference code.

xvi. Score (used for search order): value used to set the product priority according to its search results.

3.8.7 Catalog – SKUs

To register a SKU you must first have a registered product. Then click SKU> New SKU:



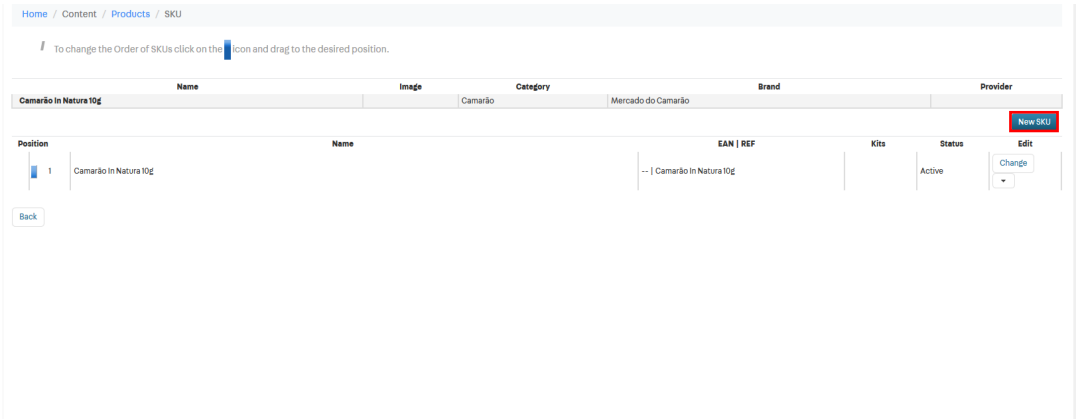


Image 33- Skus

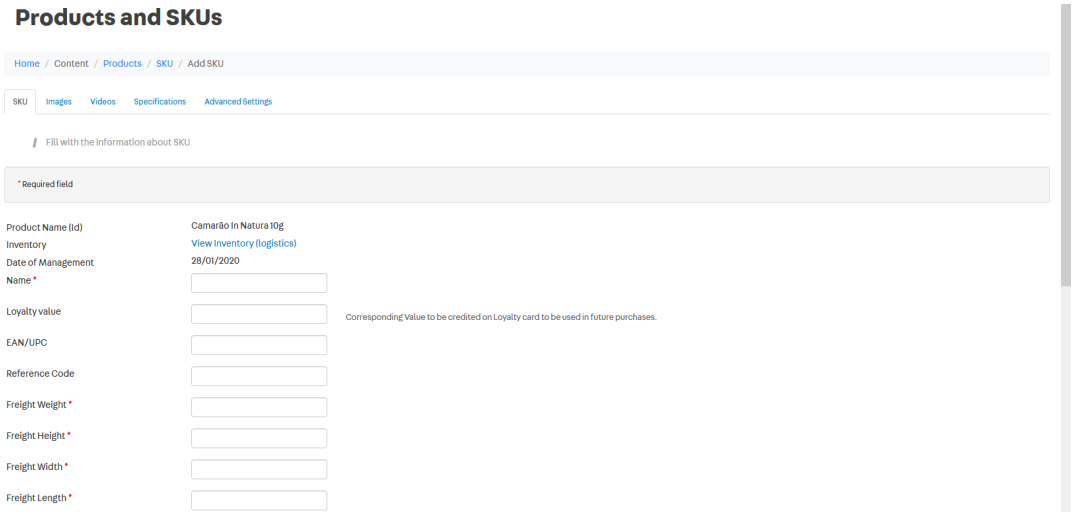


Image 34- New Sku

i. Product Name: appears filled with the name of the product the SKU belongs to.

ii. Name: SKU name, i.e., the product variation, which has already been registered. Ex: Product - Blue Sneakers - Size P.

iii. Loyalty value: this field has been discontinued.

iv. EAN / UPC: SKU unique identification code (barcode), accepts up to 13 numeric characters.

v. Reference Code: SKU reference code.

vi. Freight weight (in grams): the weight of the purchase to calculate the shipping cost.

vii. Freight height (in centimeters): the height of the purchase to calculate the freight.

viii. Freight width (in centimeters): the width of the purchase to calculate the freight.

ix. Freight length (in centimeters): the length of the purchase to calculate the freight.

x. Net weight (in grams): actual weight of the product.

xi. Net height (in centimeters): actual height of the product.

xii. Net width (in centimeters): actual width of the product.

xiii. Net Length (in centimeters): actual length of the product.

xiv. Coming soon expected on: in case of pre-orders, enter the expected arrival date of the product, in dd / mm / yyyy format.

xv. Accessories: adds new SKUs to the SKU being registered. If you are registering a dress, include a belt as an accessory. Its particularity is to generate a checkbox where the customer can click and buy both items at the same time.

xvi. Suggestion: suggest new SKUs to the SKU being registered. If you are registering a dress, suggest a belt to go with it. However, the customer cannot buy them together.

xvii. Similar (products similar to): this field has the function of showing on the product page other similar options. Limit of 50.

xviii. Show together: displays suggested product SKUs for joint purchase. Commercial

xix. Condition Code: used to define specific promotions / installment rules to SKUs.

xx. Measurement Unit: used only in cases where it is necessary to convert the unit of measurement (m - cm, pounds - kilos, etc).

xxi. Activate SKU if Possible: this field activates the SKU if it meets all the requirements for activation.

xxii. SKU Activated?: defines whether the existing SKU is active or not. It does not allow any changes and is only used for consultation.

xxiii. Manufacturer Code: provided by the manufacturer to identify the product. If any product has a specific code, this field must be completed.

3.8.8 Catálogo - Cadastro de Imagem

Image 35- Image

1. Click Images.
2. Then Insert.
3. Select your image from Choose File.
4. Fill in the Text field.
5. Fill in the Label field.
6. Click Send.

How to associate an existing image with a SKU:

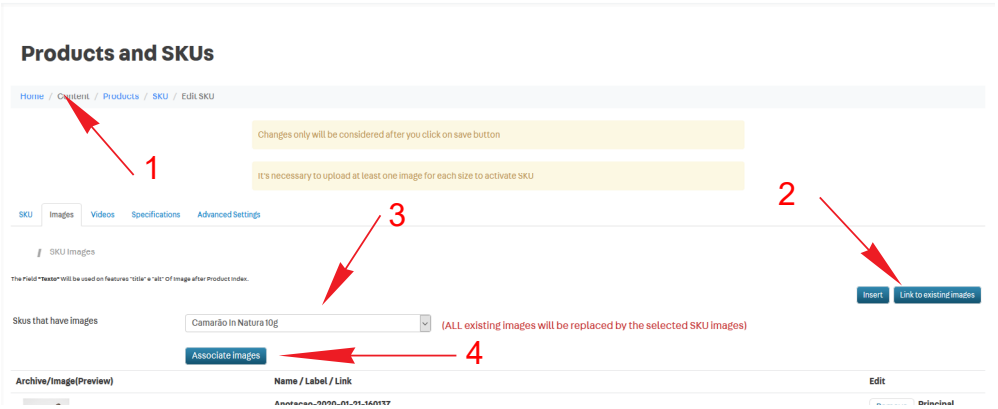


Image 36- Image 2

1. Click Images.
2. Then Link to Existing Images.
3. Select a SKU.
4. Finally click on Associate images.

3.8.9 Catalog - Videos

The Videos tab acts as an input to URLs. These URLs can be used by the site developer on the product page:

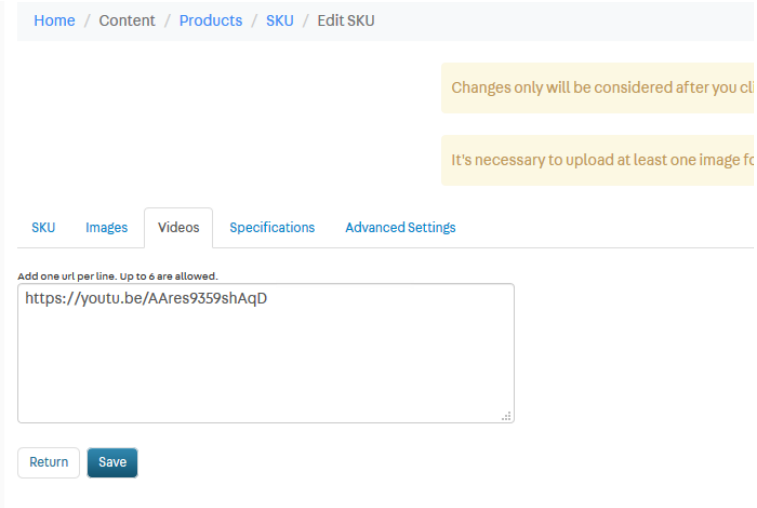


Image 37- Videos

3.8.10 Catalog - SKU Specifications

The SKU specifications registered in the category tree will be available in the register. Filling is required:

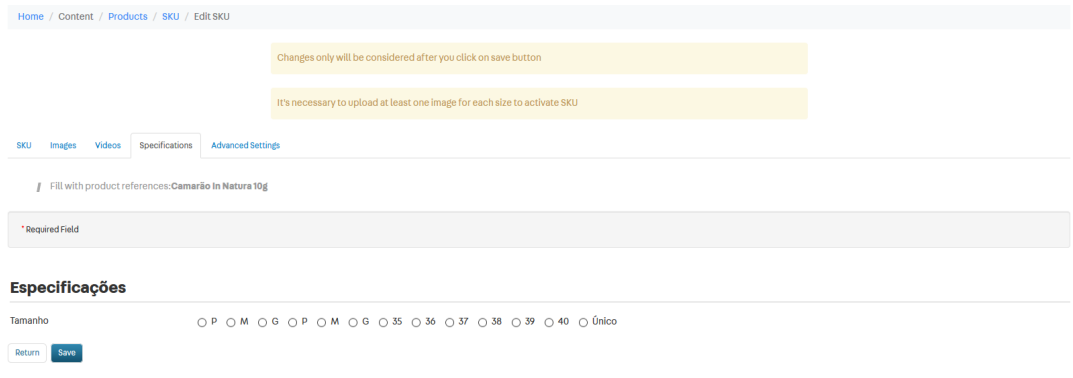


Image 38- Especification

3.8.11 Catalog - Advanced Settings

Tab used for advanced configurations of products having the following information:

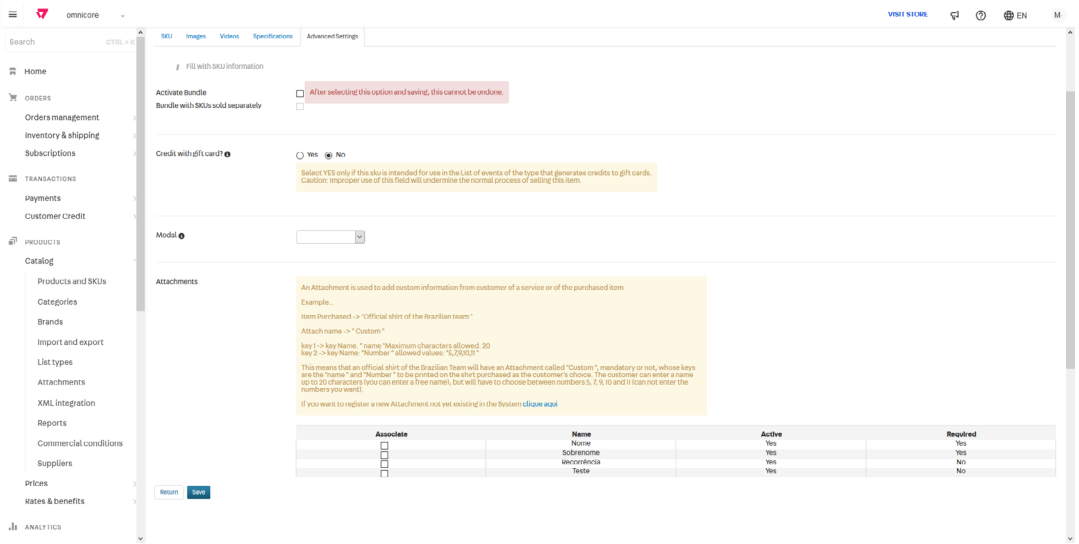


Image 39- Advanced

i. Activate Bundle: defines whether the SKU of the product in question is composed of one or more SKUs, becoming a Kit. Once activated, it is not possible to reverse the flag.

ii. Bundle with SKUs sold separately: The Kit items may be sold separately, for example, if the end customer does not want a product of this kit.

iii. Credit on gift card?: defines that the SKU will generate credit on a voucher.

iv. Attachments: shows an attachment options you can select.

3.8.12 Catalog - Import and Export

This module is used to import and export to and from the platform through spreadsheets. It can be used with products and SKUs, images, and product specifications. To access the module, simply select : Catalog > Import and Export:

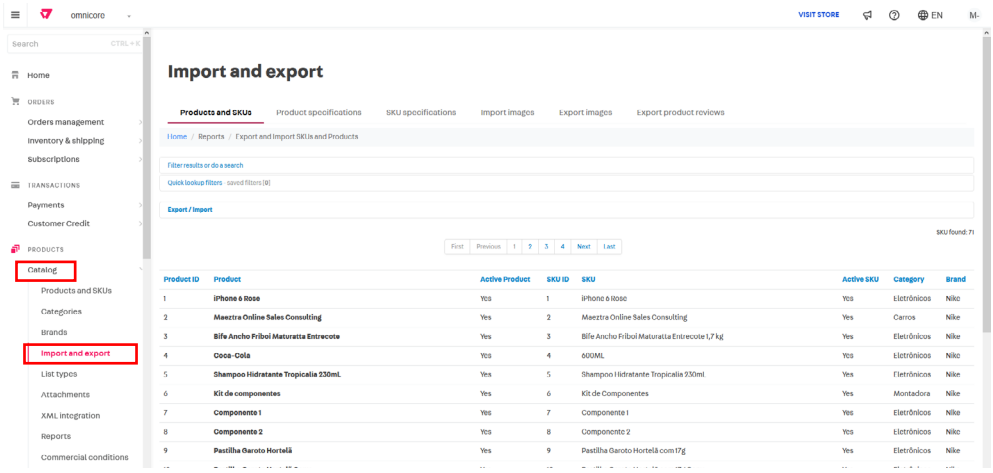


Image 40 - Import

To import a product spreadsheet, for example, simply select Export / Import, select Import, follow the instructions given by the platform, and use the template spreadsheet as an example. Remember that the spreadsheet fields are the same as those mentioned in the product registration and SKU.

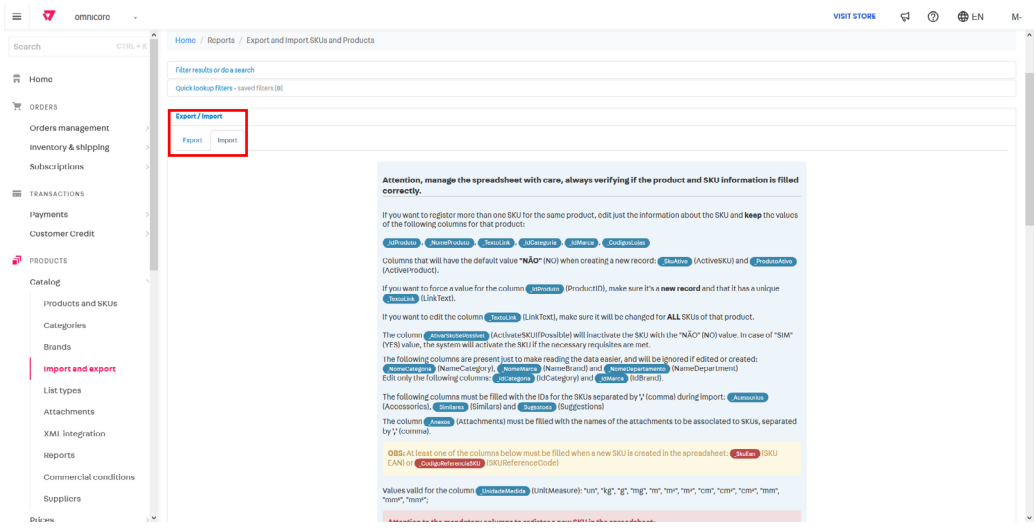


Image 41 - Import 2

Export:

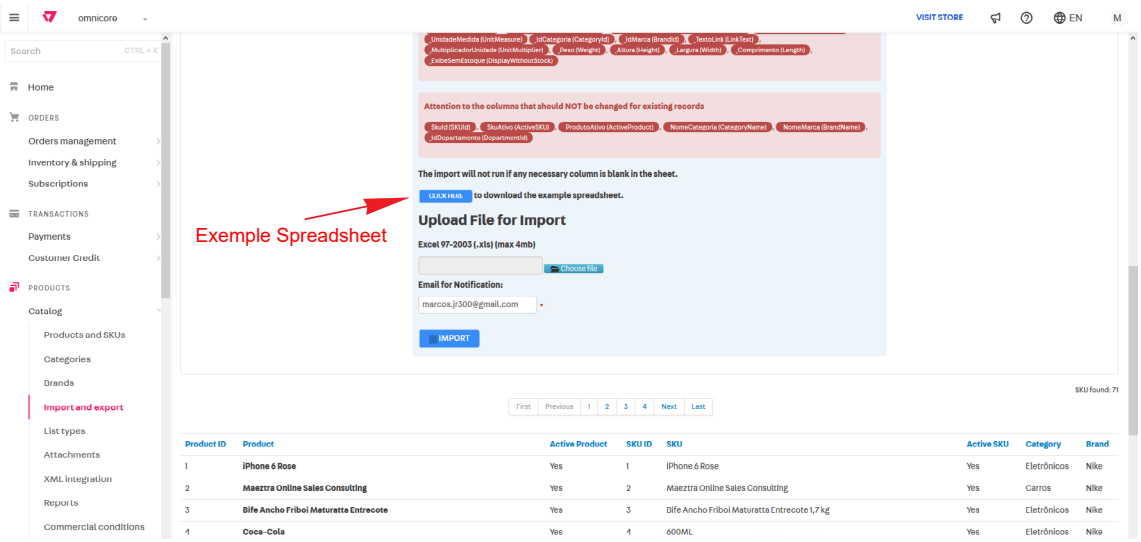


Image 42 - Export

For more information on import and export spreadsheets, we recommend you visit the VTEX Platform Help and see the necessary steps:

https://help.vtex.com

3.9 Inventory

In this module we register the e-commerce stock, delivery services, and docks (distribution centers). To access it click: Orders > Inventory & Shipping.

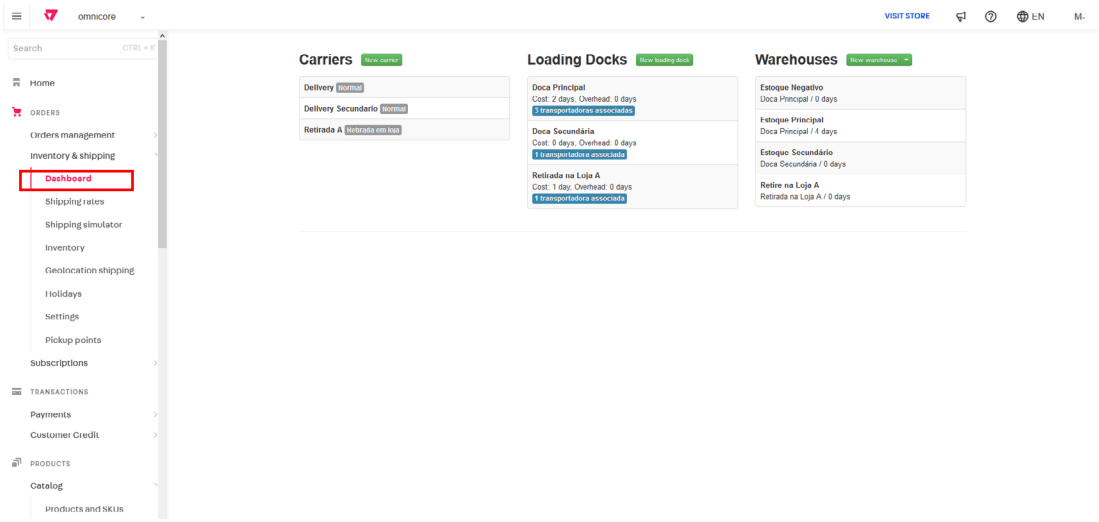


Image 43 - Inventory

i. Warehouse: the physical space used for the storage of the e-commerce goods. It is the place for the inputs of new items in the inventory and the release of orders. It is possible to have a view of the inventory.

ii. Loading Docks: A dock is a logistics step that lies between inventory and carriers. It functions as an outlet for products coming from a distribution center.

iii. Carriers: Carriers are the companies responsible for distributing the products sold by an e-commerce. It is common for a store to have multiple associated carriers. This is because carriers' operating and fleet profiles vary according to the route, lead time and type of product they will deliver.

To create a warehouse, dock or carrier, simply click "New" next to the item you want to create.

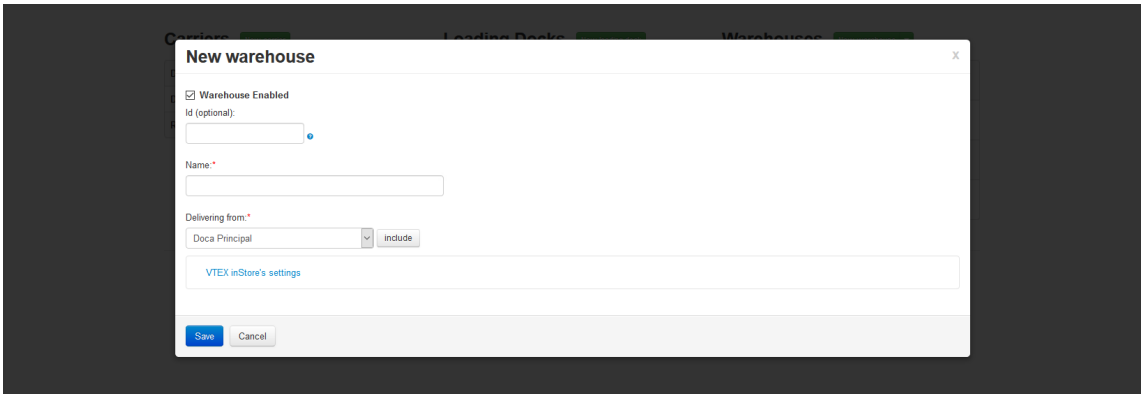


Image 44 - Logistics

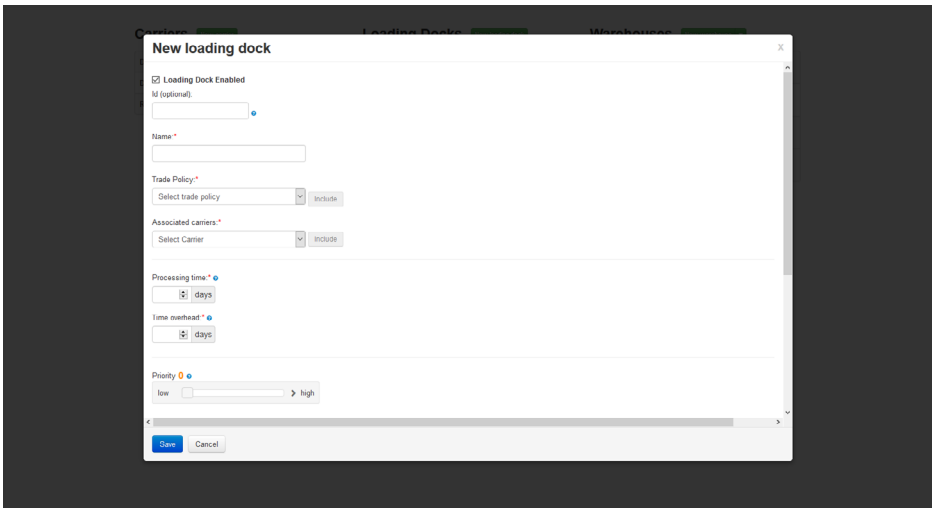


Image 45 - Dock

i. Id: dock id field. If not filled, it will be created automatically.
ii. Name: dock name.
iii. Sales channel: the commercial policies met by this dock.
iv. Associated carriers: carriers assigned to a dock.
v. Processing time: time to be considered in the freight calculation.
vi. Time overhead: time not used for freight calculation, but to be considered when choosing the most advantageous dock.
vii. Priority: Tiebreaker value for dock selection. The higher the priority of the dock, the greater the chance of it being selected for delivery.
viii. EndPoint WMS: used to integrate an external WMS software (warehouse management system) to the order processing flow.

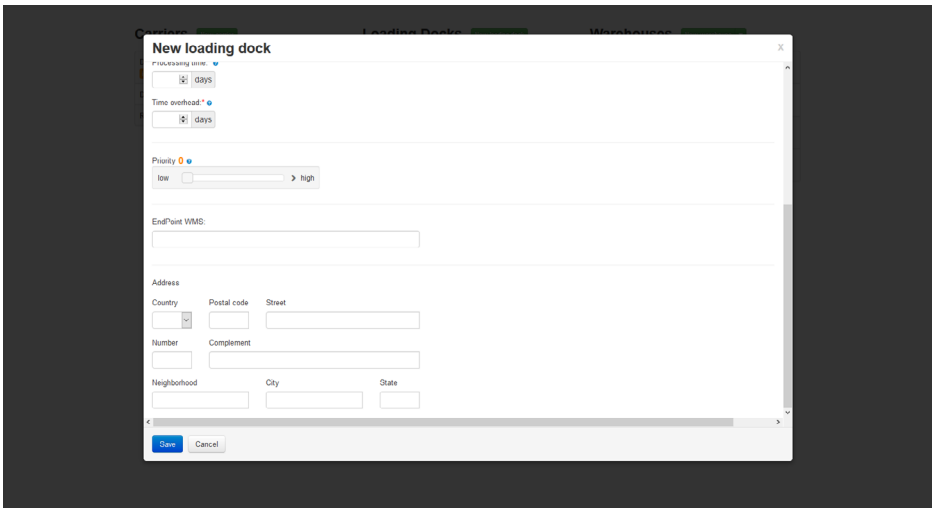


Image 46 - Save Dock

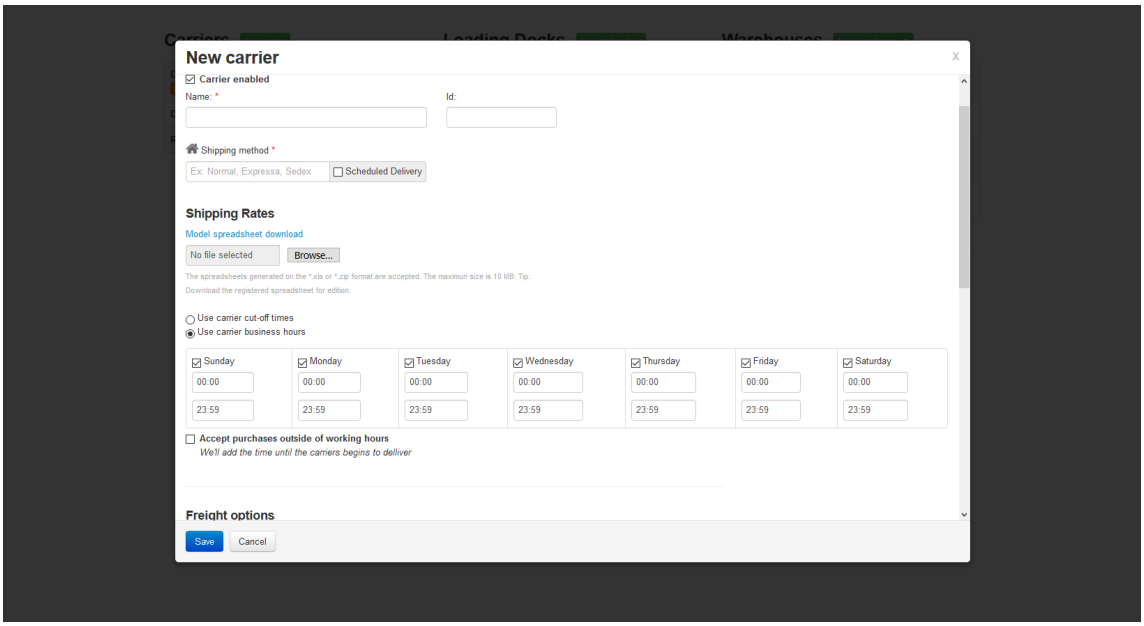


Image 47 - Transportations

i. Carrier enabled: flag to indicate whether the carrier is enabled or not.

ii. Name: internal name of the carrier.

iii. ID: Internal identifier. Must be filled with letters and numbers only. If not filled in, an ID will be created automatically.

iv. Delivery type: name that will be displayed on the checkout to the client.

v. Scheduled Delivery: allows the definition of custom delivery periods, and can define specific deadlines and prices.

vi. Shipping Table: a table with the values and terms assumed by the carrier.

vii. Use carrier cut-off times: times when the products will be removed from the Dock. It's used to optimize freight calculation.

viii. Use carrier business hours: days and time the carriers will operate.

ix. Accept purchases off working hours: allows the carrier to accept purchases outside its defined business hours.

x. Sum of measures H+W+L: are the maximum limits accepted by the carrier. Upon reaching this value, either delivery is divided into packages or is not delivered by this carrier.

xi. Largest edge measure: this is the largest measure accepted by the carrier. Upon reaching this value, either delivery is divided into packages or is not delivered by this carrier.

xii. Cubic weight factor: a factor that will be used to calculate cubed weight. Use cubic weight only if weight exceeds: from this weight limit on, the calculation of the cubed weight will be considered for the shipping rate.

xiii. Carrier delivery or non-delivery on weekends: informs whether the carrier delivers on weekends. This option includes holidays.

xiv. Only delivers if the total of items of the shipment is a multiple of: if delivery is divided into shipments, this field will limit the minimum number of items for assembling it. If this number is not reached, the delivery will not be performed by this carrier.

xv. Delivery modal: determines the modal attended by this carrier. This field is available only if you have modes enabled in your logistics configuration.

xvi. Choose pickup points: select this field to open the Pickup points option. Click the drop-down and select a registered pickup point. Click Include to link the pickup point to this carrier. If you want to use a tag registered at the pickup point to relate to the carrier, in Tags, select a tag and click Include.

Shipping ranges, weights and values are fed into VTEX platform based on a spreadsheet. To download the model, click "Model spreadsheet download" and fill in the fields with the necessary information.

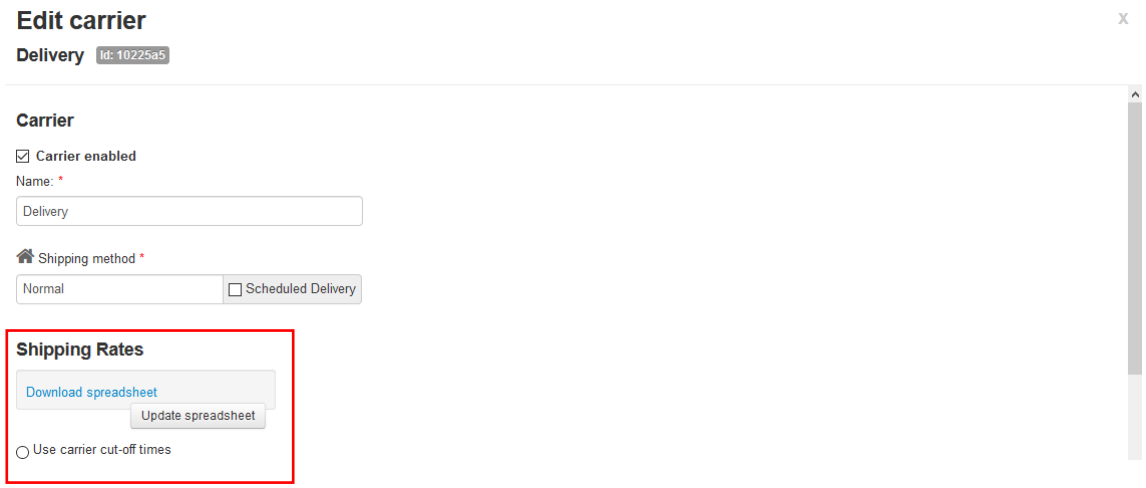


Image 48 - Save Transportation

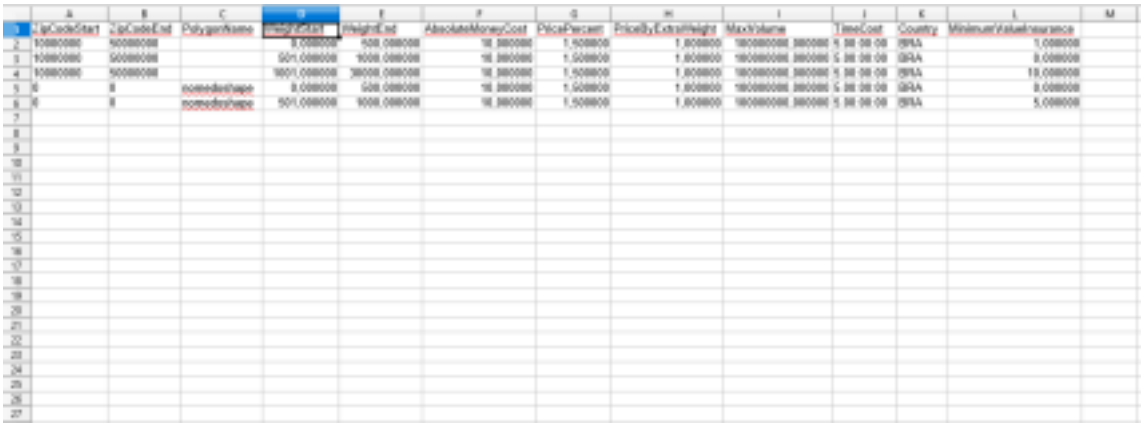


Image 49 - Freight

i. ZipCodeStart: zip code range start.

ii. ZipCodeEnd: zip code range end.

iii. PolygonName: identification of the polygon defined in the geolocation function.

iv. WeightStart: the weight range start, in grams, for the respective zip code range.

v. WeightEnd: the weight range end, in grams, for the respective zip code range.

vi. AbsoluteMoneyCost: absolute freight price to be charged, i.e., at least this amount will always be charged.

vii. PricePercent: additional shipping fee according to cart price. PriceByExtraWeight: additional shipping fee according to cart weight in grams.

viii. MaxVolume: maximum volume, in centimeters, to be carried by the carriers.

ix. TimeCost: order delivery time, in the format DD.HH: MM: SS.

x. Country: country where products will be delivered. Must be completed with the 3 digit ISO country code.

xi. MinimumValueInsurance: this is an absolute value freight add-on, which will be compared to the value entered in PricePercent and multiplied by the cart value. The larger value will be the one added to the freight.

To access through Logistics, you must go to “Inventory and Shipping”> “Inventory”, then enter the product name, ID or SKU name, then select which SKUs you want to edit:

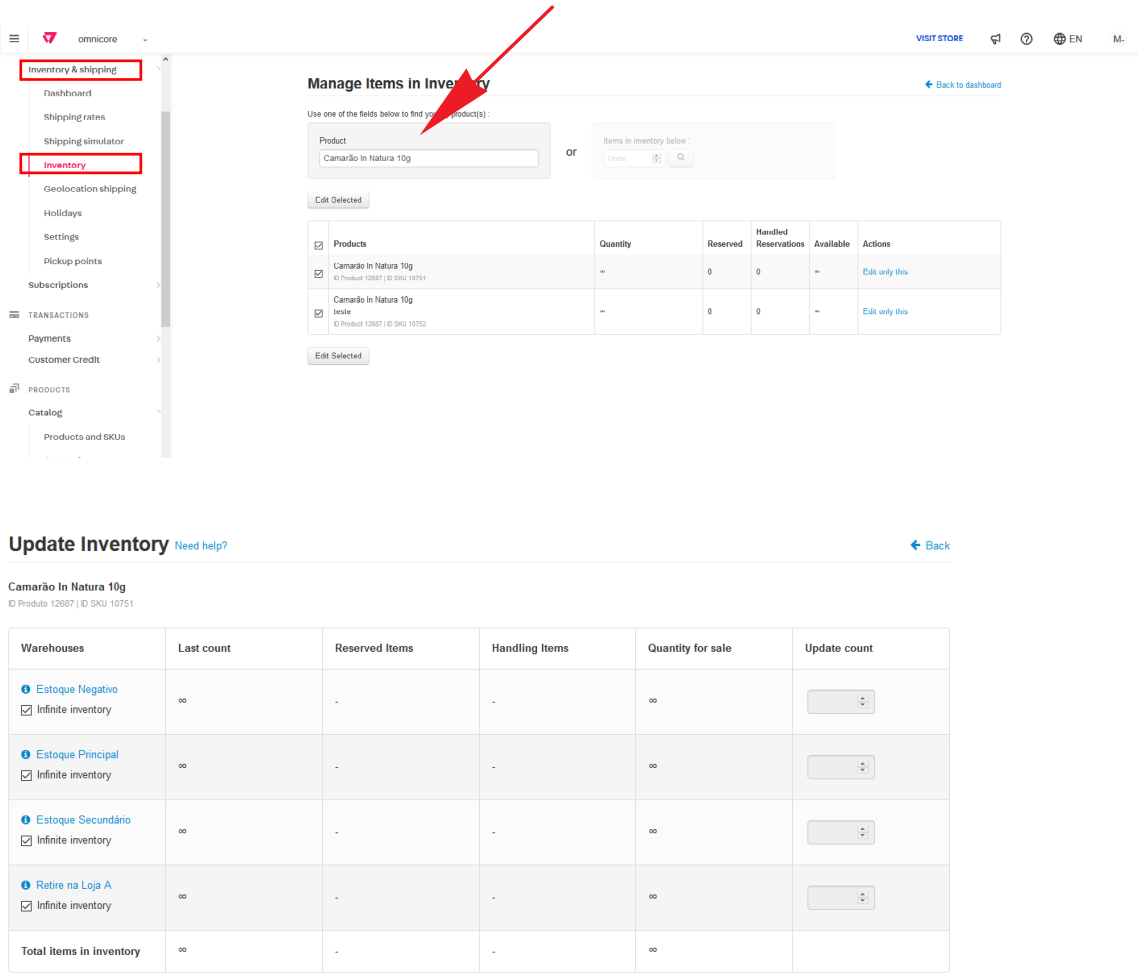


Image 50 - Inventory

After selecting the SKUs to be changed, simply place the quantities of products in stock. You can use the option “Infinite inventory” when the stock of a product has no limit (a digital book, for example). For a better identification of the status of each product, we have the following columns:

i. Last count: total sum of the other columns.

ii. Reserved items: products that have been reserved, but have not been handled yet.

iii. Handling items: products that have gone from reserved to handling, just waiting for delivery to definitely leave stock.

iv. Quantity for sale: how much of this product can still be sold, after considering the items reserved and in handling.

3.10 Pricing

Here you can register the price of each SKU manually through admin, in mass by importing from an Excel spreadsheet or through a API. To register the prices of products, you must access: Prices > Price List.

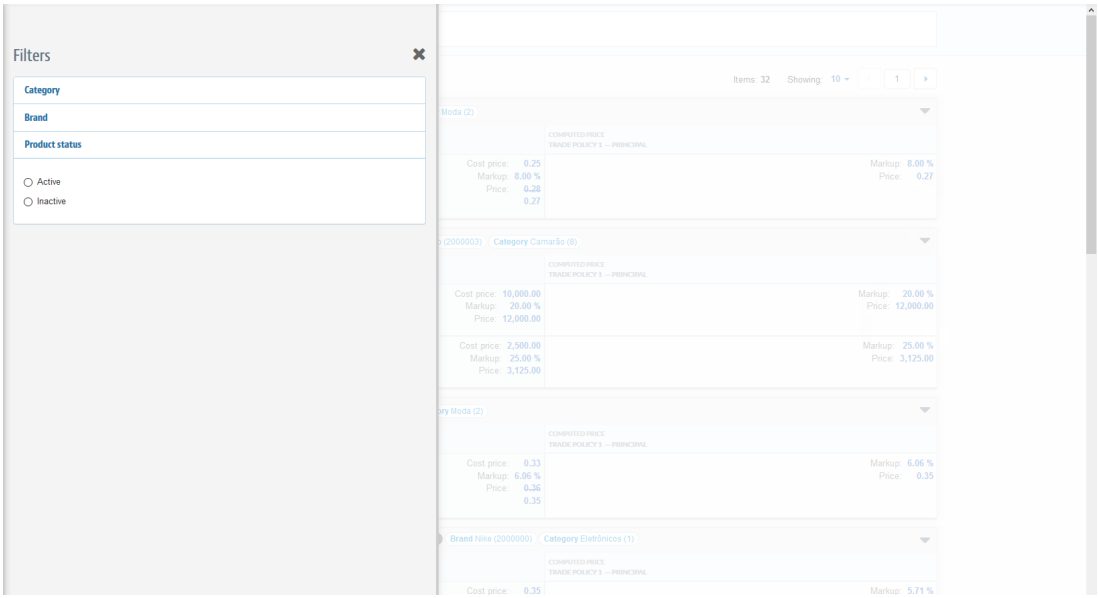


Image 51 - Price

Here we can enter the prices on the product SKUs:

i. Cost price: cost price for markup calculation.

ii. Initial markup: percentage of profit over cost price.

iii. Base price: price that the product will be sold at the store (also known as “Price Per”).

iv. List price: price that will be shown on the website demonstrating that the product is costing less than normal value (also known as “Price From”).

Products can be filtered in the top bar of the module, making it easy to change specific products posteriorly . It’s also possible to change prices through export and import spreadsheets.

3.11 Rates and Beneftis

This module is responsible for registering store promotions, which can be activated with specific conditions, UTMs (URL parameters), coupons, etc. To access the module, click Rates and Benefits > Benefits:

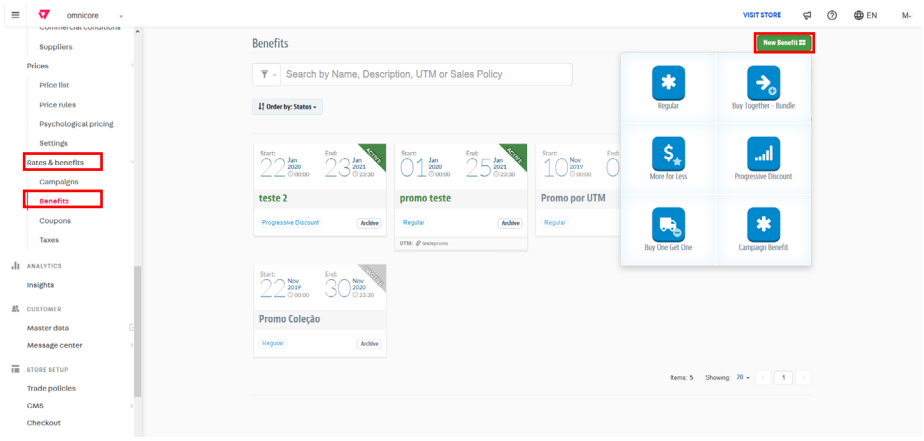


Image 52 - Promotions

To register new promotions, click “New Benefit” and select which promotion you want to use:

i. Regular Promotion: this type of promotion is widely used because it can cover many possibilities of discounts, and it has a wide variety of conditions in its fields.

ii. Buy Together: it is a promotion used to give a discount on products placed at the same time in the cart.

iii. Take More For Less: this type of promotion is used to give a discount to customers purchasing many units of the same SKU.

iv. Progressive Discount: this type of promotion is used when it’s given a discount for a certain amount of products in the cart.

v. Buy & Win: this type of promotion is used to offer a gift if a particular product is purchased.

vi. Campaign Benefit: this type covers all types of promotions featured in the Regular Promotion, and a few more configurations, such as free shipping, promotional price tables, and gifts.

There is a big number of possible promotion scenarios. for more information got to: https://help.vtex.com

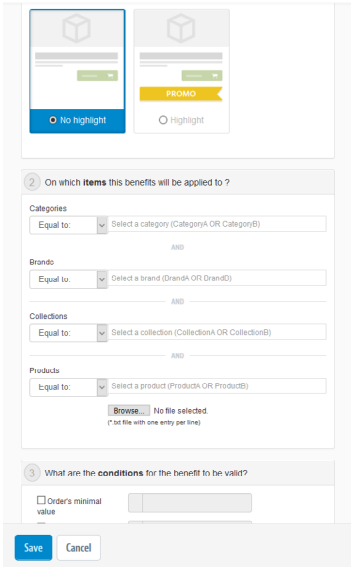


Image 52 - Promotions 2

i. Categories: defines which categories will participate in a promotion.

ii. Brands: defines which brands will participate in a promotion.

iii. Collections: defines which collections will participate in a promotion.

iv. Products: defines which products will participate in a promotion.

v. Minimum and maximum value of the order: the promotion will be applied taking into account the “gross” value of the cart, without considering any other promotions or shipping.

vi. Also consider items that are not part of the promotion: This field is available when the minimum order value field or the maximum order value field is selected. This field is to allow a certain promotion to consider all the products in the cart, even those not listed in the “Categories”, “Brands”, “Collections” or “Products” fields.

vii. Accumulative purchases: the discount will be granted if the total amount of all purchases already made by a customer reach the amount filled in this field.

viii. Item value between: the discount will be granted if the item value is meeting the range of filled values.

ix. "From" and "to" prices are the same or "from" and "to" prices are different: only one option can be selected. It refers to the product registration values.

x. BIN restriction: discount will be granted if the card BIN is listed in this filled.

xi. Create coupon with the UTMs above: create a coupon with the registered UTMs to give the customer access to a promotion only with the coupon code.

xii. Utmi_cp: the discount will be granted if navigation is performed with the registered utmi_cp (case sensitive).

xiii. Only on the first purchase: the discount will only be granted on the customer's first purchase.

xiv. Apply this discount even if the client is not logged in: this field is available when the field "Only on first purchase" is selected. If this field is checked, the promotion will be applied even if the consumer has not entered their email and password.

xv. Usage limit: limits the number of times the promotion will be applied. Enable usage limit per client: enables the number of times each customer can receive the promotion.

xvi. Allow accumulation of promotions: allows more than one promotion with the same type of discount to be awarded at the same time.

xvii. Allow accumulate with manual prices: allows the promotion to be applied to products whose prices have been manually entered by telesales.

3.12 Payments

The module Payments is responsible for managing store transactions, gift cards and settings so that payment services can be used. To access Payment settings go to: VTEX > Transactions > Payments > Settings.

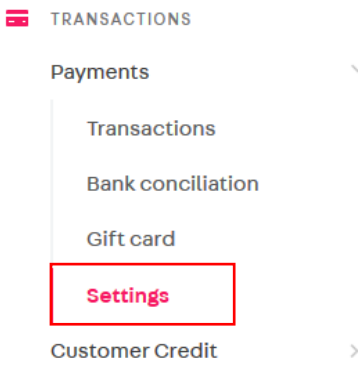


Image 52 - Payments

Payment service settings are divided into three steps:

i. Gateways
ii. Affiliations Payment Conditions
iii. Notifications

The VTEX platform has its own gateway and has natively several integrations with other gateways, acquirers and even banking services.

This means that to use them, there is no need to develop an integration with the service - just hire a payment service that is already natively plugged into VTEX and perform the necessary settings.

Each payment service has its own hiring conditions and services. The client must hire the one that will meet your business needs.

i. The most common are:
ii. Payment Intermediaries
iii. Acquiring Banks
iv. Bank slips
v. Anti-Fraud Service

3.12.1 Payments - Gateway Afiliations

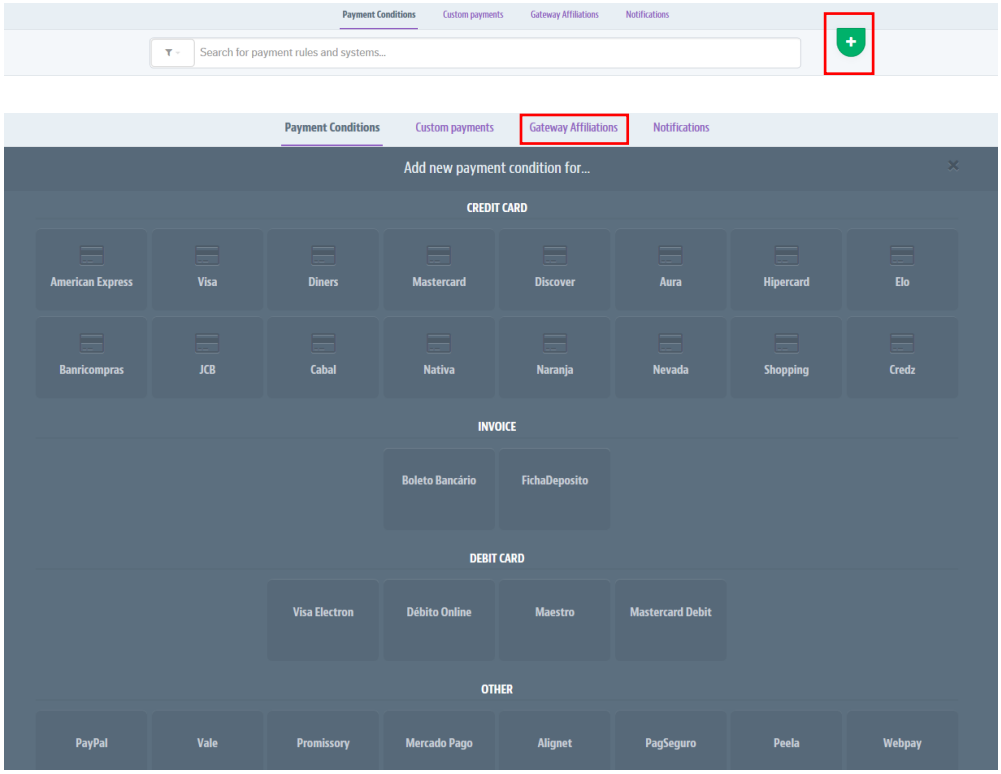


Image 53 - Gateway

After hiring the Payment Service, the parameterization must be performed by clicking on the desired payment service and filling in the necessary information. Each Payment

Service operates according to its technological characteristics, so each of them will require the inclusion of specific information within the VTEX platform so that it can be tested and published.

Below an example of the required fields for Adyen acquirer:

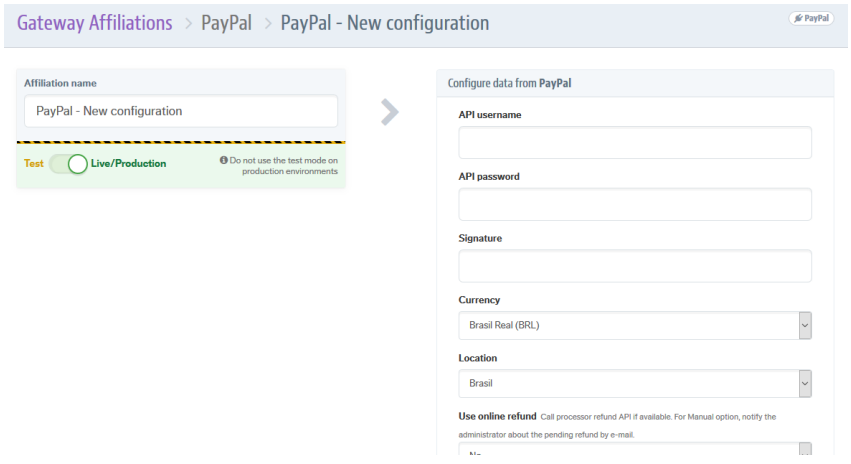


Image 54 - Afiliados

Once the Payment Intermediary / Gateway is contracted and parameterized, the payment terms, banners and services must be configured and linked.

Access Payments > Settings > Payment Conditions and click "+" at the top right corner of the page.

3.12.2 Payments - Conditions

Access the payment term you want to make available in your store so that the form with the required information opens and can be set up.

In the example below we will discuss the parameterization of a MasterCard Credit Card in 12 installments:

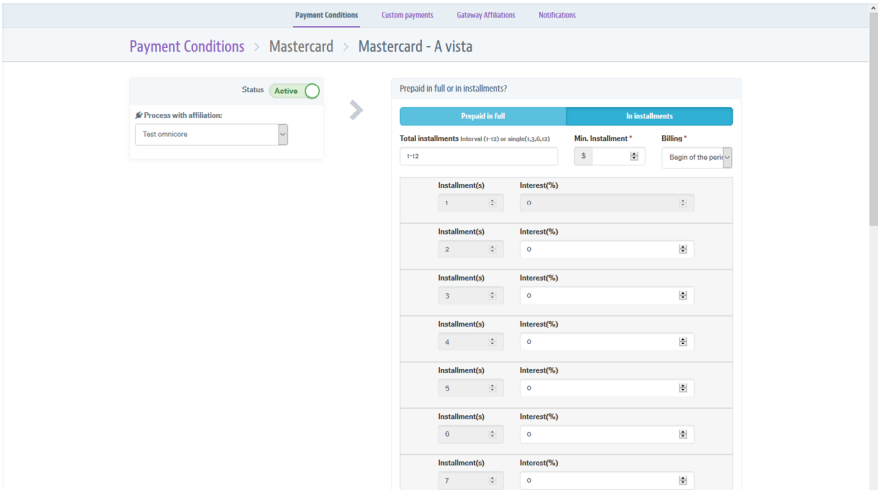


Image 55 - Conditions

i. Rule Name: payment identification name.

ii. Status: active or inactive for online store sales.

iii. Process with affiliation: defines the payment service that will process the credit card brand and the payment conditions.

iv. Prepaid in full or In installments: defines whether the payment will be paid in installments or in cash.

v. Total installments: defines the number of installments.

vi. Min. Installment: defines the minimum value accepted per installment.

vii. Billing: defines when the customer will be charged for interest.

viii. Interest: defines the percentage of interest to be charged per installment.

3.12.3 Payments - Notifications

This PCI configuration area defines which email will receive notifications about actions that need to be taken by the merchant regarding store payments.

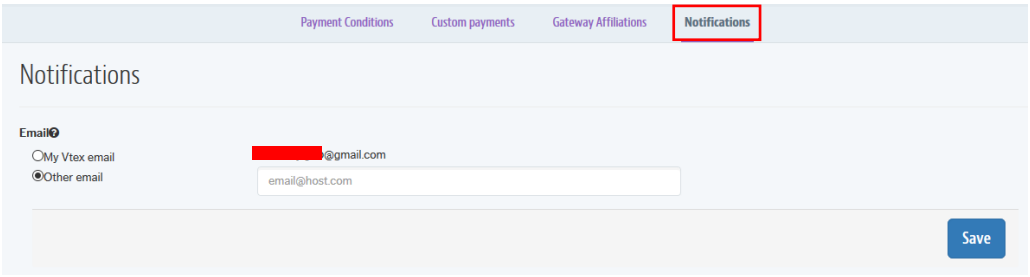


Image 56 - Notifications

The email registered in this section will be notified whenever there is a problem with any payment. Two examples are: a chargeback that didn't work out and needs to be done manually, and a capture that didn't work correctly.

3.12.4 Payments - Transactions

The transaction area is responsible for storing all transactions and attempts made during the checkout process. In a store supported by VTEX, a transaction begins each time a user chooses a payment condition and closes an order. From there, the purchase data is sent for validation by each of the process members. You can track each step of the transaction flow in Payments and see exactly the status of a payment through the displayed status. You can also validate if there was an error in the purchase attempt.

3.13 Message Center

The Sender is the email that will be used to trigger the platform communications with users / buyers. To perform sender registration: “Message Center” > Senders.

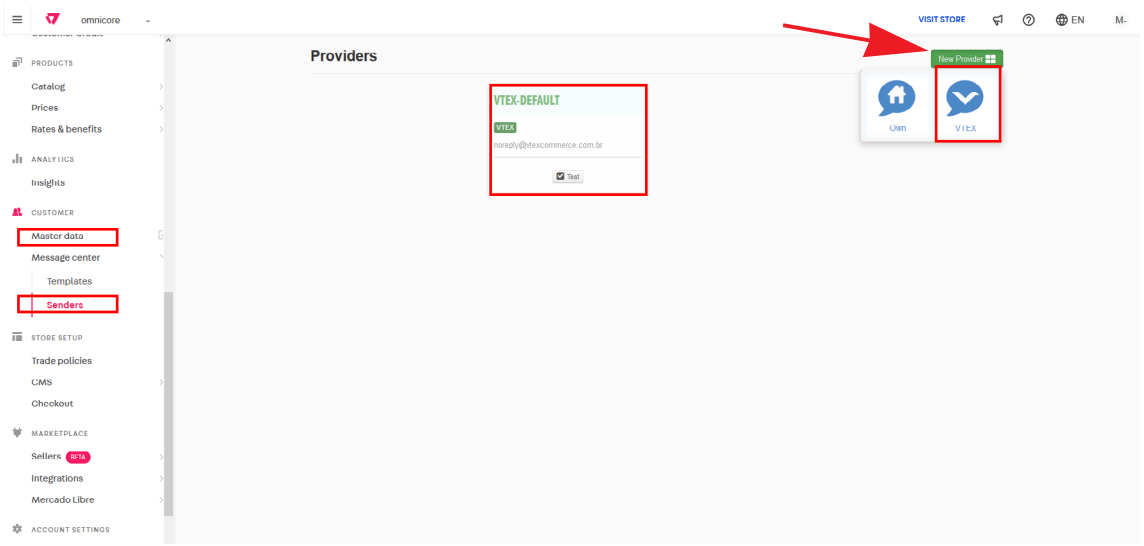


Image 57 - Message Center

In the print above, the highlighted card is the default VTEX sender. To request a check and be sure the sender is working, click on the test button. When selecting “New Provider”, two options will appear: to use your own SMTP (if the store owns one) or the VTEX native.

* We recommend using VTEX SMTP.

3.13.1 Message Center - Senders

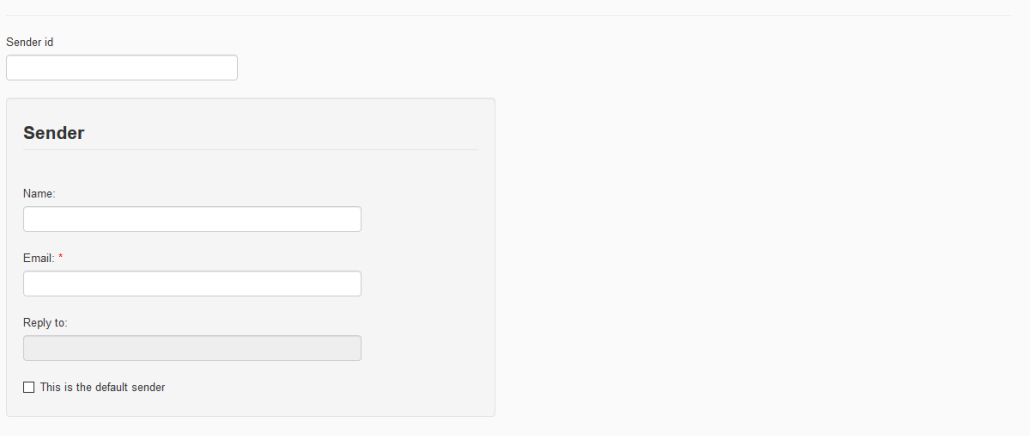


Image 58 - Senders

When selecting VTEX provider, the following fields will have to be filled in:

i. Sender id: created sender id.

ii. Name: sender's name.

iii. Email: an email that will be used to send transactional emails to clients. It will need to be a valid email, so when registering and clicking on "Test", a verification will be sent to this email.

iv. Reply to: where replies for this sender will be sent to.

v. This is the default sender: check this field to use this sender as default for all transactional emails.

3.13.2 Message Center - Templates

Email Templates are layouts that will be sent to customers in case of purchase, payment approved, among others. To access, Message Center" > Templates:

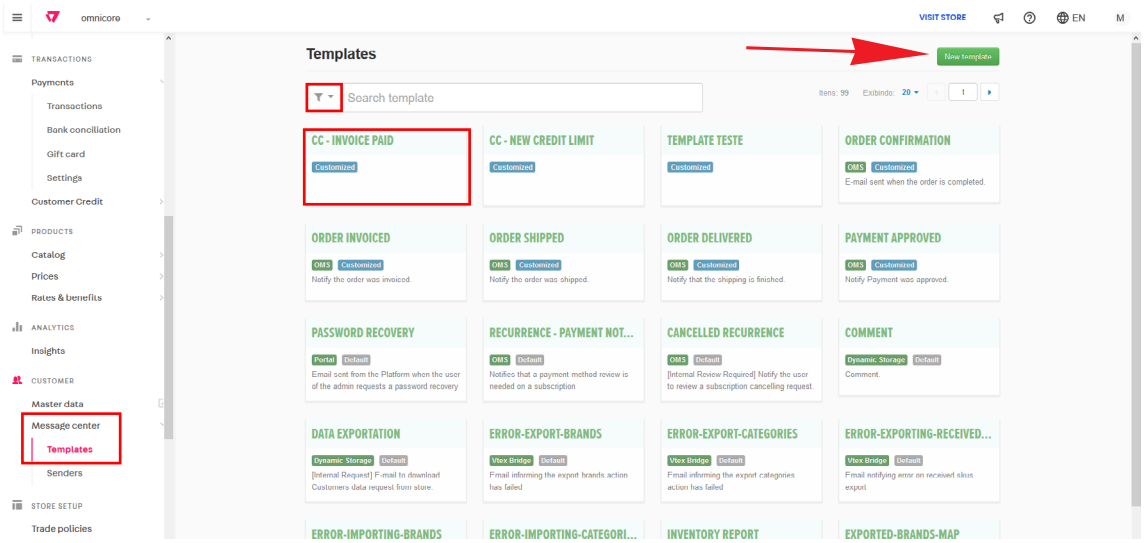


Image 59 - Templates

In the search bar you can easily find the templates . If you are looking for a specific one, use the filter to have the templates organized by types. Each card represents a different transactional email and VTEX provides a basic and responsive layout for all messages, with information needed to communicate properly with your customer, but it is possible to edit them according to the brand communication standard. If you want to create a new template, click “New template”.

It is recommended that the storeowner requests the agency to include the e-commerce logo and contact information.

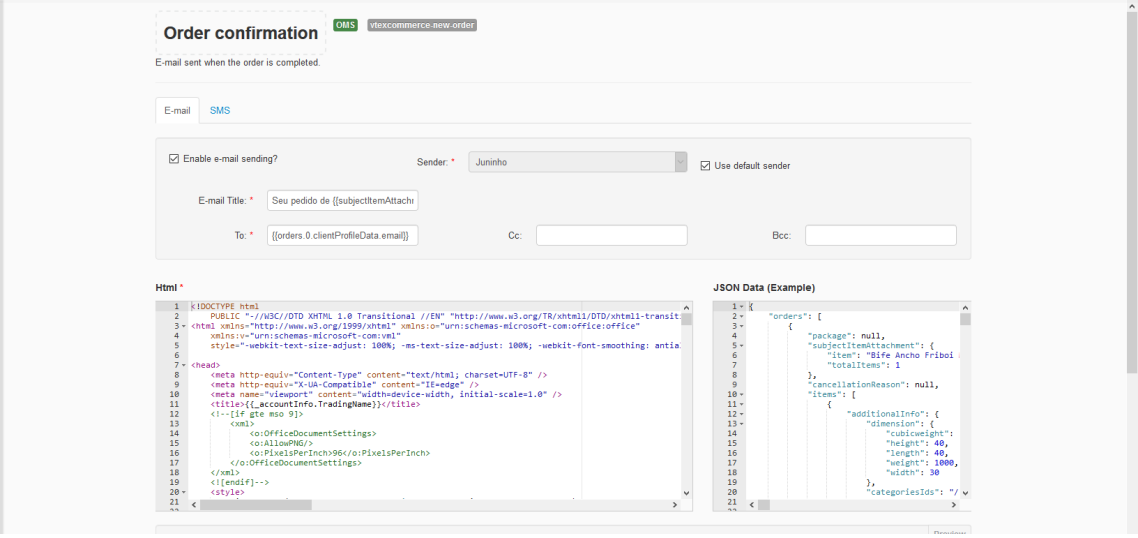


Image 60 - Email

i. Template Name: name given to the template for a better understanding of what it does.

ii. Enable email sending?: enable or disable the email in question.

iii. Sender: which sender will be used (active only if “Use default sender” is unchecked).

iv. Use default sender: will use the sender marked as default or whatever is selected in the previous field.

v. Email Title: subject of the email that will be sent to customers.

vi. To: to whom it will be sent (by default it is used the parameter that locates the related customer’s email).

vii. Cc: copy another email.

viii. Bcc: blind carbon copy.

ix. Html: the code used to create the template to be sent.

x. JSON Data (Example): an example that shows the information used by the template that can be used as a parameter in the Html email.

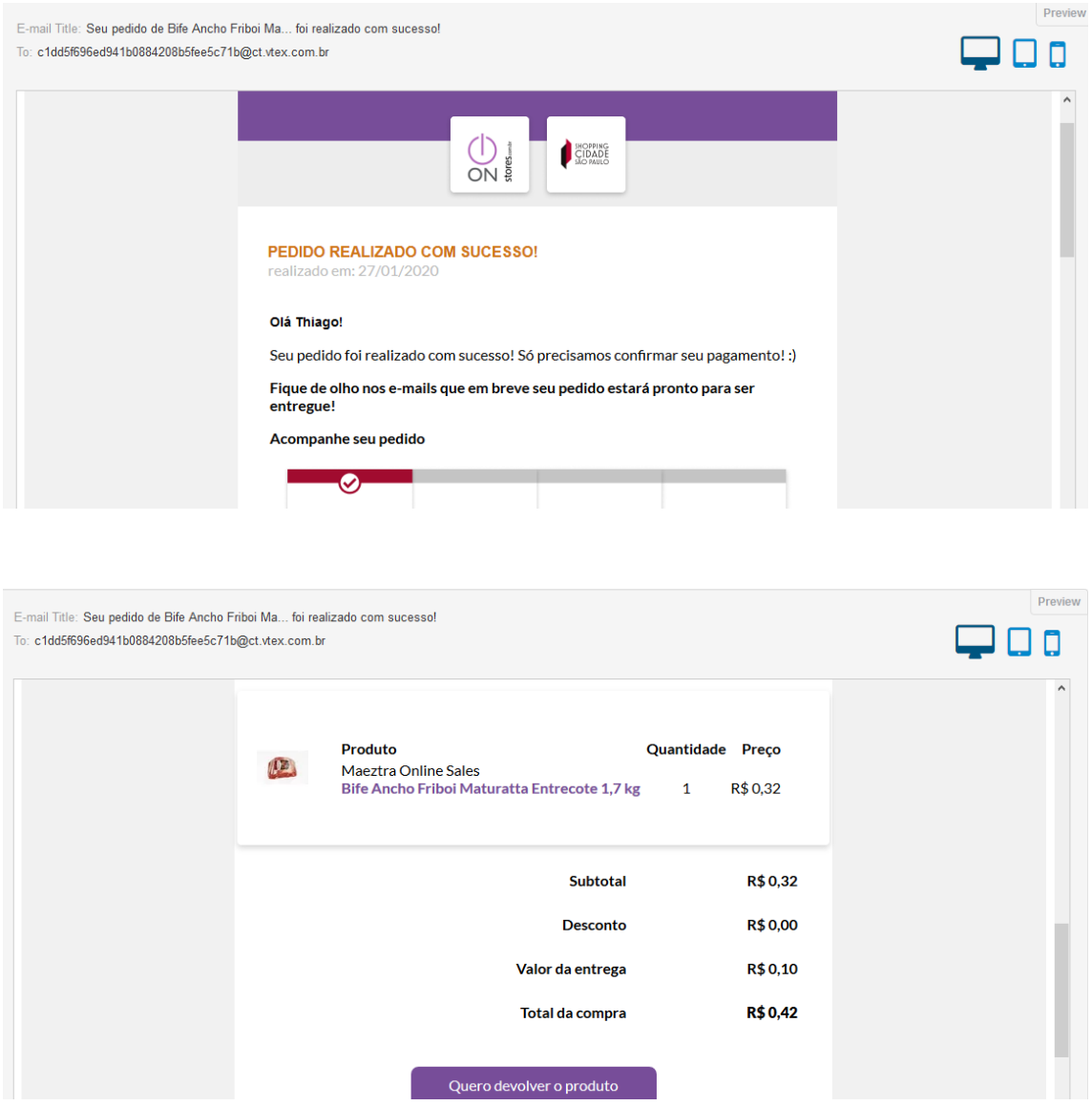


Image 61 - Emails

You can see above a preview of how emails will reach end customers. They can be viewed on a desktop, mobile and tablet .

3.14 Marketplace

Vtex Marketplace is the module responsible for ready-made platform integrations. They are supported by VTEX itself and do not require hiring an e-builder to be used.

Today the platform has natively the following partners:

1. Amazon
2. Buscapé
3. Carrefour
4. Dafiti
5. Facebook
6. Google Shopping
7. Magazine Luiza
8. Mercado Livre
9. NetShoes
10. B2W
11. ViaVarejo
12. Zoom

The Marketplace is not always a design premise. This parameterization can be performed later for new stores that do not yet have a digital presence and do not have sales through any online channels.

For customers migrating to the VTEX platform, it is important that it is priorly parameterized and tested.

To access Marketplace setup area : Marketplace > Integrations > Settings.

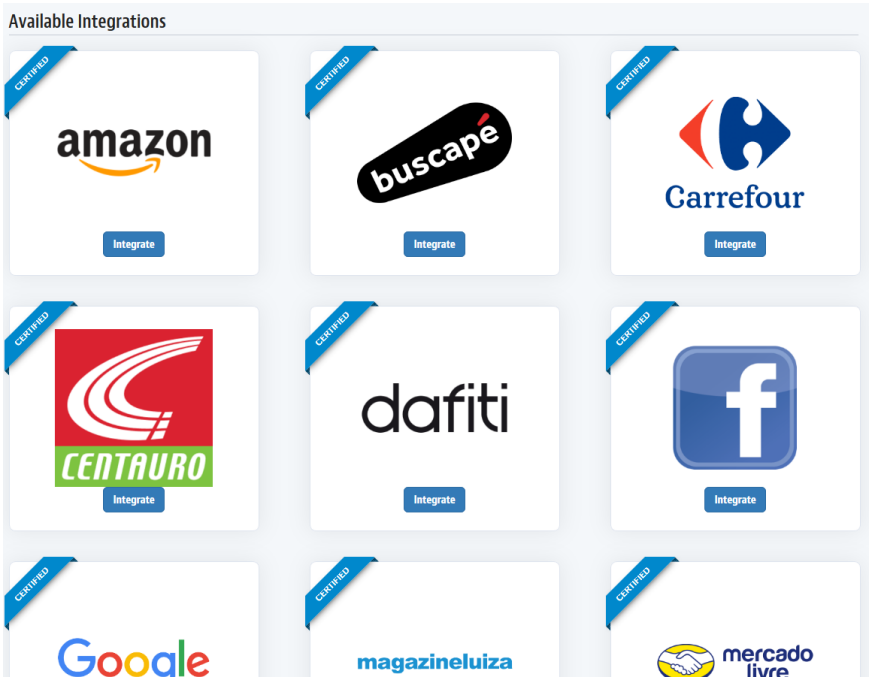


Image 62 - Marketplace

3.14.1 Marketplace - Settings

Each partner demands specific configurations that evolve according to each platform features.

It is recommended that it is done based on the updated VTEX Platform Help documentation: https://help.vtex.com.

3.15 Mídias and XML

This topic will cover the concept of XML, and some external media tools that are considered important during the implementation process.

XML is a data structure standard commonly used by media tools so that the e-commerce catalog can be integrated with external tools. The most commonly used platforms for this type of integration are price comparison websites.

Below are some examples of external tools that use the XML framework to communicate with the platform:

1. Buscapé
2. Clickaporter
3. Criteo
4. Facebook
5. Fashinera
6. Google Shopping
7. Ilovecommerce
8. Jacotei
9. Kuantokusta
10. Lomadee
11. Muccashop
12. Terra
13. Uolshopping
14. Zoom

Some of these tools provide an integration through the Marketplace module, or via XML. To access the XML area go to: Catalog > XML Integration.

It is recommended to use the models already available as a base, but the user can register a new one:

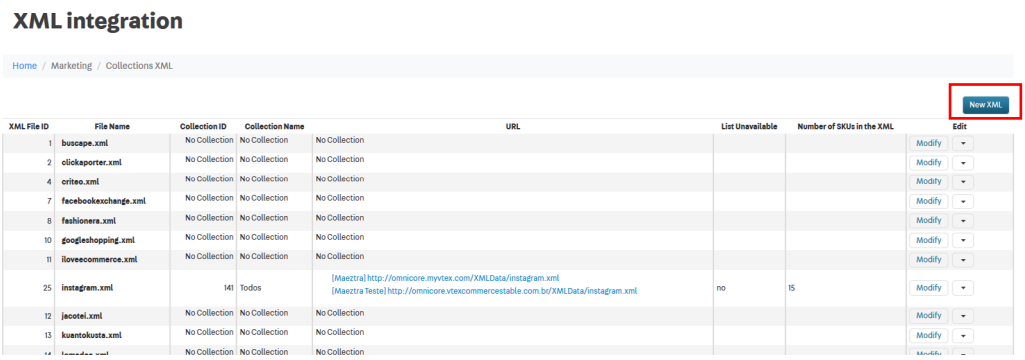


Image 63 - XML

XML has a number of technical specifications and it is recommended that it is configured by someone who has knowledge on the subject.

Google Adsense:

Google Adsense is the leading tool in digital ads. It allows you to generate traffic for e-commerce in various channels such as Google search, Display, Youtube, among others.

The tool has a lot of relevance in e-commerce indicators. When properly structured generates qualified traffic, and can leverage sales. It uses store URLs as the basis for ad creations.

During implementation, it is not a prerequisite to GO LIVE, but it is recommended to start as soon as possible. For migration projects, it is important that campaigns be restructured using new platform-generated URLs after migration.

Google Shopping:

Google Shopping is a price comparison service that showcases Google searches.

It is a highly qualified tool for traffic generation and conversion increase and it uses XML or integration via API.

The VTEX platform offers both ways. it is not a prerequisite for implementation projects, but as it is a highly qualitative tool it is recommended to start using it as soon as the store goes live.

For migration projects, it is important to redone the integration and have the XML reviewed before going live.

Facebook Ads:

Facebook Ads tool consists of using social network traffic to maximize e-commerce metrics.

As it is a social database, it plays a key role in generating qualified traffic.

Facebook Ads is either XML or Native Integration based, but both depend on installing a PIXEL (Javascript code snippet) so that information can be measured during the purchase process.

In the VTEX platform we have three ways to use PIXEL:

1. VTEX CMS - Hardcoded Pixel usage based on direct installation in the store source code.

2. VTEX CMS - Google Tag Manager Pixel installation through GTM.

3. VTEX IO - APP + GTM - when it comes to VTEX IO, it is necessary to install the pixel, but pages such as cart and checkout still require deployment via GTM.

It is recommended to hire a partner to install the tool.

3.16 Master Data

Master Data VTEX is an application that is natively used to store general platform information but is also widely used for customizations that require information storage, front-end API queries, and even external data feed integrations.

The customer base, for example, is registered in this application. To access, click on: Customer > MasterData. Then click on "Customers" form in Profile System to query buyer records:

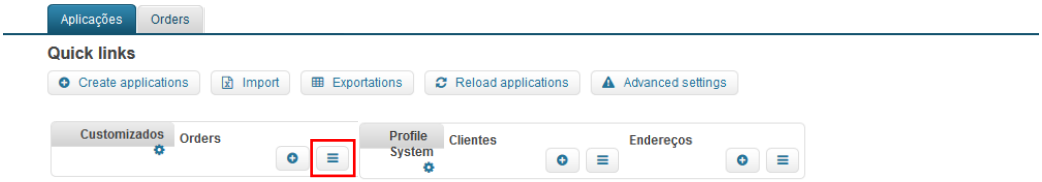


Image 64 - Masterdata

In order to maintain the customer base, it is recommended to use MasterData import mode, so buyers from the previous site can be structured in a spreadsheet and imported into the platform: Master Data > Applications.

First, export the customer table:

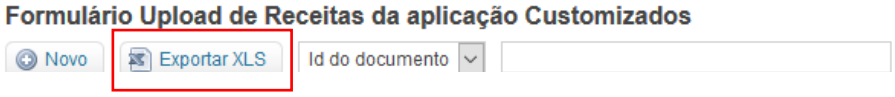


Image 65 - Masterdata Export

Then import into:

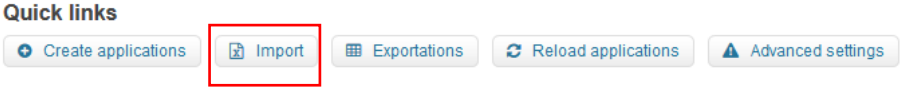


Image 66 - Masterdata Import

Master Data VTEX also provides an interface to create:

i. Entities: entities are nothing more than tables. You can create a table called Newsletter for example, where the subscribers' names and emails will be captured.

ii. Additional Fields: fields can be added to the user profile and used on the store front end to capture more specific information such as gender. In the example cited in entities, name and email would be additional fields.

iii. Triggers: these are actions that can be parameterized in the interface and can be used, for example, to send a welcome email to a new buyers.

iv. Forms: Once an entity is created with its proper fields, a form can be added to serve as a query base within the platform.

Making these features available within the platform opens up a wide range of new features that can be structured to meet specific e-commerce needs and should be widely explored. We recommend that you align with the contracting partner ways of exploring these resources in favor of the business.

3.17 Redirect 301

In this topic we will cover: how the VTEX URL builder works its importance and platform migration projects.

Redirect is a native feature of VTEX that provides a dashboard for the user to redirect a platform internal link to another internal link permanently.

It is commonly used when a link no longer exists in e-commerce, for example, when a product has been discontinued, or the product category will no longer be available in the store. It is a strong ally when considering SEO.

This process is recommended when there used to be a category or product available, but not anymore. It is likely they have been indexed by search engines, meaning that they can be searched by Google or similar tools. When this product or category is discontinued, if the user tries to access them, they will come across an error page.

"Redirect" comes in to cover this error. The old link that is no longer available for access can be redirected to the new link using the VTEX tool.

Another use for Redirect is when the project is a migration, i.e., the store was on another platform and is migrating to VTEX. In this scenario it is recommended that all links that have some level of expression (access) be redirected to new links within the VTEX platform.

To perform this process, it is recommended to cross old Google Analytics navigation data (if so) with tools like Google Search Console and SEMRush.

3.17.1 Redirect 301 - Migration

Another very big use for Redirect 301 is when the project is a migration, i.e., the store was running on another platform and is migrating to VTEX.

In this scenario, it is recommended that all links that have some level of expression (access) be redirected to new links within the VTEX platform.

To accomplish this process, we recommend cross-checking Google Analytics navigation data from the last 90 days with tools that measure page relevance, such as Google Search Console and SEM Rush, for example.

Redirect 301 is the process that ensures in a platform migration that the store has as few negative impacts on SEO as possible and should be interpreted as a critical design point. The storeowner should give high priority to this task.

To access: Store Setup> CMS> Layout. When accessing, it is recommended to export the spreadsheet by clicking on the button below for the template to be made available for filling.

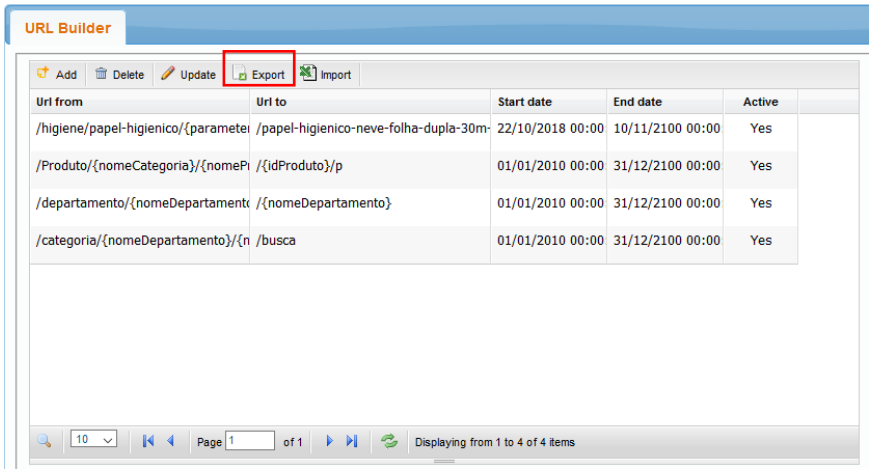


Image 67 - 301

Spreadsheet fields are:

i. Url From: URL to be redirected (it should not contain the domain) .

ii. Url To: URL to which the browser will be redirected (it should not contain the domain).

iii. Start Date: the date when mapping will begin to be considered .

iv. End Date: the date when mapping will no longer be considered Active: enabled or disabled mapping.

3.18 Google Tools

This topic will cover operationally what are the recommended tools for site implementation, what should be configured and, on a macro level, how they can be helpful when the store is in production. The VTEX implementation project aims to materialize the publication of a virtual store with all the necessary functionality to operate the e-commerce, using the platform resources.

In addition to the e-commerce publication, there are highly recommended external tools that have compatible integration with the platform. Here we will cover the three main Google tools:

1. Google Tag Manager
2. Google Analytics
3. Google Search Console

Google Tag Manager:

Google Tag Manager is a tool that provides a dashboard for deploying tags and scripts in e-commerce, without having to be in touch with the source code of the site, which guarantees a certain level of security.

The source code of a site is extremely sensitive as it dictates all the behavior of the screens that are made available for user browsing.

Google Tag Manager is very useful for securely deploying external tools, and some of them already exist on the platform. They are:

i. Google Analytics: data analysis (you can have more detail on Vtexbook).

ii. Google Ads (Conversion): sponsored links platform. A place where you manage your search ads, shopping, and google partner network.

iii. Google Ads – (Remarketing): product sales suggestion based on browsing history.

iv. Google Optmize: Google's A / B test tool.

Google Tag Manager can be installed in three ways:

1. Source Code: When creating an account on Google Tag Manager, it provides a script (code snippet) that should be made available for the agency to proceed with installing on pages.

2. VTEX Configuration: For VTEX CMS stores, the platform natively provides a field where the Google Tag Manager ID will be included and it can be used from there.

3. VTEX Help provides a step-by-step on how to configure it.

https://help.vtex.com

Google Analytics:

Google Analytics is a tool that provides traffic and number analysis on key e-commerce KPIs. It is a tool provided by Google that even in its free version generates information about:

i. Traffic Analysis: measures the total volume of users visiting your site, and you can also filter by more specific pages and conditions.

ii. Conversion Funnel: the steps the buyer takes within e-commerce to place an order.

iii. Conversion Rate: this is the rate that measures the ratio of conversions to the number of sessions. It is one of the key business metrics.

iv. Average Ticket: the average value of purchases made in the store.

v. Revenue: the monetary amount captured by e-commerce.

vi. Public: provides information about the online store users.

vii. Devices and Browsers: access volume numbers divided by phones, tablets, computers, and their respective browsers.

Apart from these forms described above, other several types of reports and data are possible.

Google Analytics can be installed in three ways:

1. Source Code: When Google Analytics has its account created, it provides a script (code snippet) that should be made available to the agency to install on the pages.

2. Google Tag Manager: Google Tag Manager natively makes an app available which can be parameterized directly in the tool for installing Google Analytics.
VTEX Help provides a step-by-step to accomplish this implementation.

3. VTEX IO APP: When the store uses VTEX IO technology, Google Analytics is installed through an APP that is available from the platform repository: https://github.com/vtex-apps/google-analytics

We recommend that the installation be done by the partner agency.

3.19 Google Search Console

The Google Search Console is a widely used tool to understand how your site is performing in terms of search engine positioning (Google) and how well structured and optimized it is.

GSC monitors and provides reports so that users with account access can identify errors, have insights on how to improve the site, and mainly show how relevant pages are, based on overall site numbers.

It works as a pair for Google Analytics. While one focuses on user behavior, the other addresses search engine positioning issues. Together they form a powerful combination for decision making and e-commerce performance improvements.

Google Search Console has some installation methods available. The most used one is the inclusion of an HTML meta tag in the site header. Exemple: <meta name = “google-site-verification” content = “autogenerated code” />

It is recommended that the installation be requested by the partner agency.

Note: If the store uses VTEX IO technology, the installation is also performed via APP:

https://github.com/vtex-apps/google-search-console

3.20 Quality Assurance

The Q.A. is the process of approval of the store. It proposes routines and tests to certify that the virtual store is ready to go live.

Each partner has a methodology and each project has its own particularities and due attention levels.

This process consists of performing all validations and configurations required for e-commerce to be published.

Below are some tools that can help while running:

1. Performance:
https://developers.google.com/web/tools/lighthouse/?hl=pt-brhttps://webpagetest.org

2. SEO:
https://developers.google.com/web/tools/lighthouse/?hl=pt-brhttps://chrome.google.com/webstore/detail/mozbar/eakacpaijcpapndcfffdgphdiccmpknp?hl=pt-BR

3. CrossBrowser e Cross Device:
https://browserstack.com
https://app.crossbrowsertesting.com

In the scenario of a B2C project, where e-commerce sells its products to the final consumer, we list below 44 important points to be evaluated by the agency and the storeowner before publishing the store:

Freight	validate if freight services have been tested and are consistent with actual carrier values
Pick UP Points	validate if the key configured in Logistcs is in fact the production key generated in APP
Pick UP Points	validate if all pickup points are properly registered in the platform
Categories	validate if all categories are registered, have at least one product to be active, and are correctly linked in the menu
Brands	validate if all brands are registered, have at least one product to be active, and are correctly linked in the menu
Filters	test on different pages how filters work and check if they are being applied correctly
Products	validate disposition of different types of products in the store, check if there is any registration or front-end correction that should be made (ideally one of each category)
Inventory	Verify if inventory (Inventory Count) is correct
Price	validate if the price is properly registered

Payments	check in VTEX Payments settings if cancellation email has been set
Payments	validate if an order is being placed for each payment service, and if captures and installments meet business needs
Google Tag Manager	validate if Google Tag Manager is set up and working on all pages
Google Tag Manager	validate with the customer what key tags are fundamental to meet the business rules and make sure they are in place and working
Google Analytics	verify whether tag is deployed and working on all pages
Google Analytics	perform Shopping Funnel Setup
Meta Tags	validate Home, Department, Category, Product and Institutional, and if targets H1, H2, H3, Title and Description are implemented
Login	validate if login with email and password, passkey, Facebook and Google are working
Transacional E-mails	place an order and proceed through all steps (including cancellation) to make sure that transactional emails are applied correctly, both desktop and mobile
E-mail Sender	validate if the email sender has been configured and validated. Also check with the storeowner if VTEX SPF has been added to DNS zone
Redirect 301	cross report from Google Analytics (last 90 days) with SEM Rush and Google Search Console and check if all these URLs have been redirected to VTEX
XML	check with the storeowner which platforms are integrated via XML, validate if they were created on the platform and follow the feed processing with the tools

Promotions	check if all promotions required have been created (eg free shipping, payment discount)
On-shelf Products	verify if all shelves are created and registered with their respective products.
Banners	verify if all production banners are posted (desktop and mobile) and if their links are correct
Favcon	verify if favicon is inserted on all store pages
Layout - Header	validate Logo, Menu, Search, My Account, My Orders, Cart
Layout - Footer	validate newsletter, links to institutional pages, payment banners, links to social networks
Layout - Home	navigate through the Home components, interact with them and check if there are no layout breaks for both desktop and mobile versions.
Layout - Category	browse through breadcrumb components, filters, orders, shelves, hover, banner display, pagination and check if there are no layout breaks for both desktop and mobile versions
Layout - Product	browse through breadcrumb, images, titles, prices, features, add to cart button, description, shipping info, buy together, related products, photoslurp, fixed bottom bar and check if there are no layout breaks for both desktop and mobile versions

Layout - Cart	perform navigation with a single product, with three and then with ten products. Check if there are no layout breaks for both desktop and mobile versions.
Layout - Cart	validate shipping calculation button, coupon, shipping preview, quantity, price, subtotal, discount, checkout button, reduced header and footer and check if there are no layout breaks for both desktop and mobile versions
Checkout - Profile	perform profile navigation with existing and non-existent users and check if there are no layout breaks for both desktop and mobile versions
Checkout - Delivery	perform shipping navigation using cart address and with a new address at checkout, test zip code button and check if there are no layout breaks for both desktop and mobile versions
Checkout - Payment	perform Payment navigation, form completion test for all payment services, and check if there are no layout breaks for both desktop and mobile versions
Checkout – Order Summary	perform order summary navigation, both desktop and mobile, and check if there are no layout breaks for both desktop and mobile versions
Confirmed Order	navigate confirmed order page and check if there is any layout break in the order data presentation, as well as the links to my account / my orders and product, desktop and mobile versions
Institutional Pages	navigate the store's institutional pages, check if there are wrong words and if there are no layout breaks for both desktop and mobile versions
Triggers	validate if form-related triggers and emails are working
Domain Manager	validate if Domain Manager Access is working

3.21 Go Live

This topic will cover the process that must be performed for the store to be published and accessible by the domain. The online store publishing process is highly responsive, requires operational knowledge on e-commerce, technique on domain management, development and platform.

There are variables that can cause problems during this process, so the Go Live should be scheduled in advanced with all the professionals involved.

A War Room practice is commonly adopted to perform this process. It consists of having all individuals involved in the GO LIVE process allocated in the same place, physically or on a conference call.

It is recommended to have the following professionals present to optimize the synergy of the team in case any issue or doubt arises:

1. Developer.
2. Infrastructure Manager (Domain Management).
3. Project manager.
4. Responsible for the operation.
5. Responsible for campaigns and paid media.

By having these professionals in real time, GO LIVE has its risk minimized.

This should not be terminated when the store is in production. It is recommended that staff continue to monitor to ensure no oscillations occur.

When we are talking about a migration project (other platforms to VTEX), extra attention must be given:

1. If the actual requests are working.
2. If users are able to access what they’re looking for.
3. If redirects are working in production.
4. If media campaigns have been reactivated and are performing.

3.21.1 Go Live - DNS

Once the store is implemented, it's time to set up the DNS zone.

DNS Zone is a domain pointing manager. Today most domain providers and hosting services provide an interface for these settings to be made.

Below we will list the steps to point a domain to VTEX.

1 - Register the Domain in the Account. As stated in the General Settings chapter, the domain must be configured at: ACCOUNT SETTINGS> Account management> Accounts

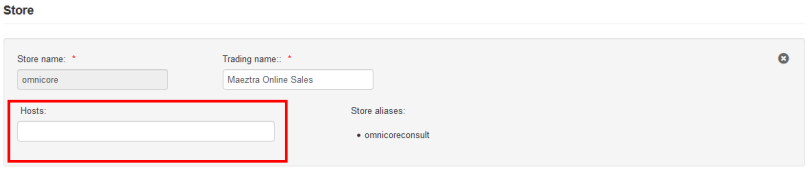


Image 68 - DNS

2 - Request the technical responsible for the domain to include the Certification Authorities:

domain.com. CAA 0 issue "letsencrypt.org"
domain.com. CAA 0 issue "comodoca.com"
domain.com. CAA 0 issue "digicert.com"
domain.com. CAA 0 issue "globalsign.com

3 - Request the domain manager to create a CNAME entry pointing to the VTEX CDN. Below are some examples:

Store Address: www.mysite.com
- Entry (subdomain): www
- Type: CNAME
- Destination: www.mySite.com.cdn.vtex.com

Store Address: www.mysite.com
- Entry (subdomain): www
- Type: CNAME
- Destination: www.mysite.com.cdn.vtex.com

Store Address: Loja.meuSite.com
- Entry (subdomain): Store
- Type: CNAME
- Destination: shop.mySite.com.cdn.vtex.com

Store Address: www.loja.meuSite.com.br
- Entry (subdomain): www.store
- Type: CNAME
- Destination: www.loja.meuSite.com.br.cdn.vtex.com

4. Put the store in production.
To put the store in production, go to: ACCOUNT SETTINGS> Account management> Accounts

Image 69 - Account

After clicking the button above, click Save and the store will be published. The deadline for publication may vary depending on the domain and hosting service, usually a deadline of 42h to 72h.

3.21.2 Access without www

A recommendation made by the VTEX platform is that access without “www” be configured using a redirection service. The most used one is Direcionar.com.br. There are other similar services, and the domain manager can choose any other that suits the business.

The example below, using Direcionar.com requires the creation of two entries in the DNS zone.

1. Type A record for domain root (can be represented by @ or just mySite.com) pointing to 52.8.174.221

2. CNAME record of redirect (or “redirect.meusite.com”) pointing to www.mysite.com.opts-uri.direct.com.

If there is more than one address that should be pointed to the site, the Direcionar.com can also be used by the domain manager as shown in the templates below:

From “www.dominioantigo.com” to “www.novodominio.com”:

CNAME www entry:
From: dominioantigo.com
To: www.novodominio.com.opts-uri.direct.com.

From “loja.algumendereco.com” to “www.site.com”:

CNAME store entrance
From: algumendereco.com.br
To: www.site.com.opts-uri.direccionar.com.br.

CASE

New Balance

4

New Balance Brazil

New Balance, established in Boston in 1906, has been in e-commerce since 2008, recently underwent a platform lockout process and began operations with VTEX on 08/2019. The main objectives established for the project were:

1. User Browsing and Purchase Ease.
2. Speed in store loading time.
3. Agility in integration with marketplaces.

The VTEX platform's goals of choice served as a backing for a store that improves its financial metrics and also for increased audience engagement related to its visual identity and layout functionality.

A very important measure was also achieved, which is the autonomy over the layout management and the e-commerce promotions and information by the operation.

The main post-measured gains in these three months were:

more **57%** organic traffic

more **2x** mobile conversion

more **40%** engagement

Schedule:

New Balance went through a deployment process that took about 9 months before the store could begin operations using the VTEX platform. Dividing into phases, we had approximately:

. Layout: 60 Days

. Development: 120 Days

. Configurations and Registration: 120 Days (in parallel with development)

. CRM and Media Integrations: 60 Days

. Approval: 30 Days

The project period always varies according to development needs, below an example 5 month schedule:

Image 70 - Case - Schedule

Layout:

The layout was created respecting the visual identity of the global brand. All colors, fonts, typography and applications were strictly followed for the Brazilian e-commerce to maintain the visual characteristics that the brand has in other countries.

In addition, the new layout has the role of being more attractive and practical for the public and the platform's flexibility at the development level was key to achieving this result.

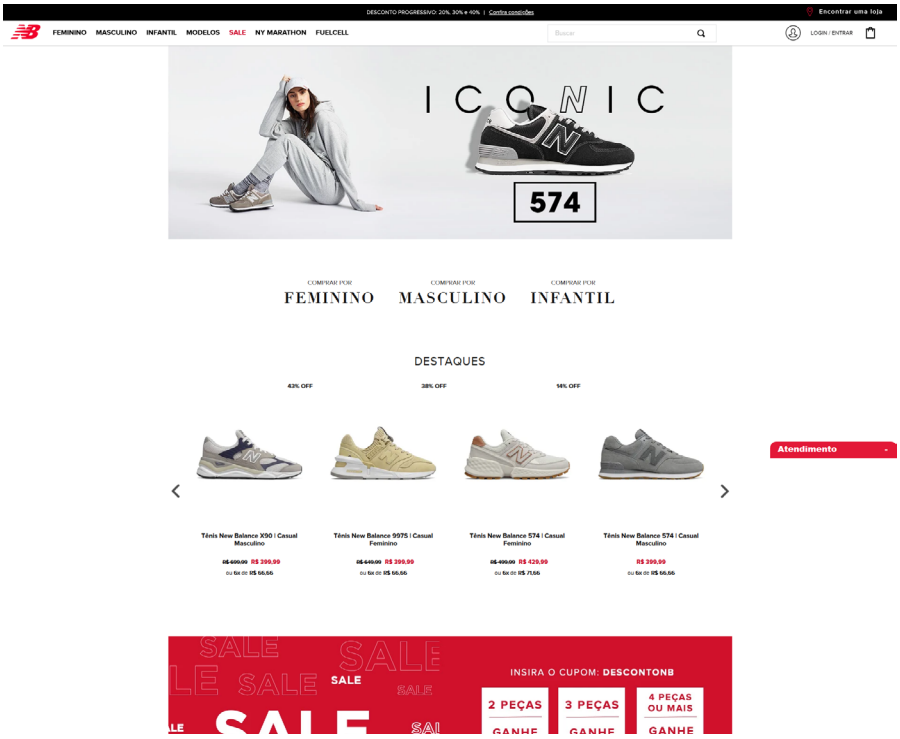


Image 71 - Case - Layout

Development:

VTEX platform CMS enables higher performance and store evolution, the development capabilities provided by the platform are continuously evolving, bringing higher performance to e-commerce.

Admin generates easy content management, CMS has a lot of flexibility to develop new features, which implies better user experience and navigability.

Features like Quick Purchase, Landing Pages, Shelf Color Visibility, Template Menu have been added.

Categorization and Menu:

The native features of the VTEX platform allow the store menu to be created based on the tree of categories recorded in the catalog, collections, banners and more specific results such as age filter, for example:

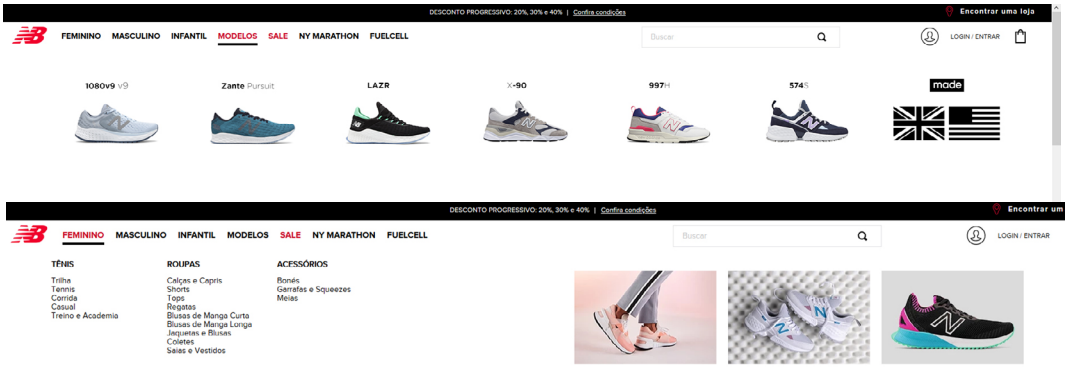


Image 72 - Case - Menu

Products:

The platform's registration structure was populated by the integration of the ERP used with all the necessary information so that the product page layout could be assertively structured:

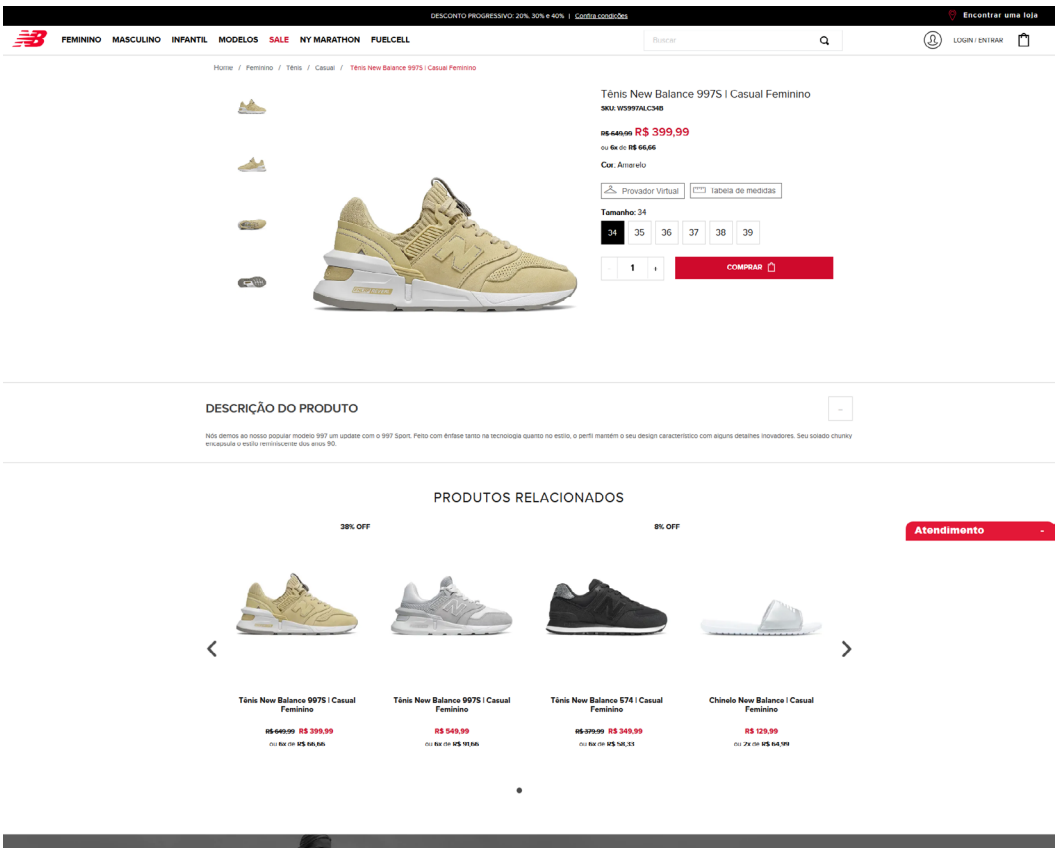


Image 73 - Case - Products

Delivery services:

The Logistics module of the platform was used to parameterize the delivery services used by the distribution center. It is available at checkout so the buyer can select the service they wish to receive. Freight is calculated based on the zip code of receipt and weight of goods:

Image 74 - Case - Checkout

Payment Services:

The VTEX Payments module was used to set the payment services required so that the user can have the most convenient purchase options in the checkout process:

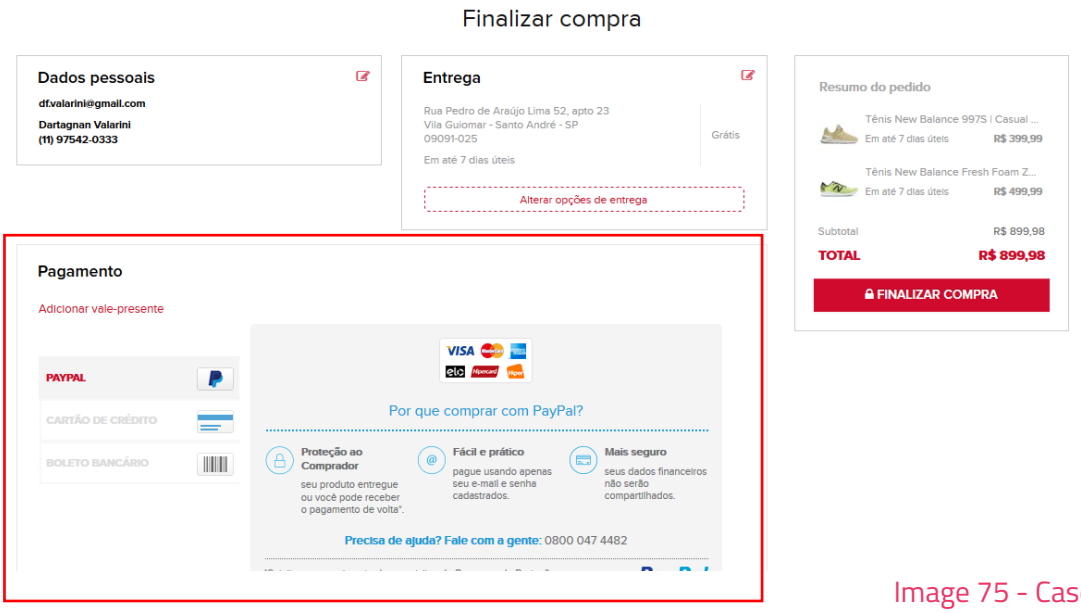


Image 75 - Case - Payments

Transactional Emails:

Store branding has also been applied to the communication of transactional emails that are automatically triggered for the user as the order flow is handled in VTEX OMS:

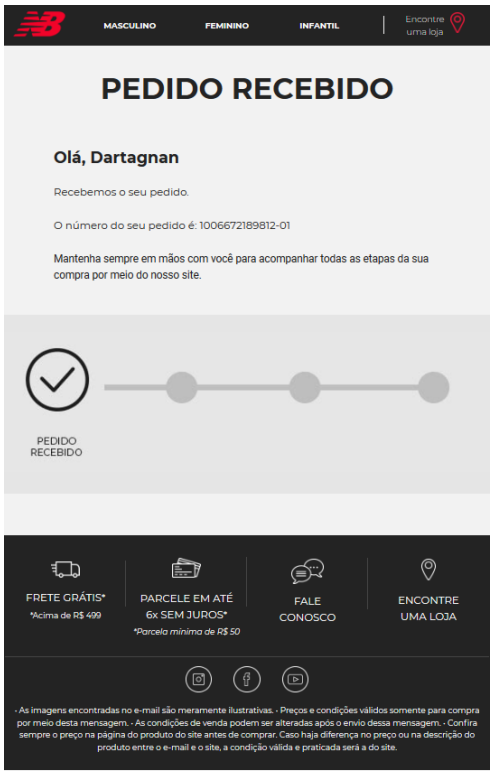


Image 75 - Case - E-mails

Redirect 301:

New Balance started its operation at VTEX from a platform migration project. As we explored in the Ebook, the 301 redirect procedure is critical to ensuring that organic store traffic is maintained, as it has a lot of revenue representation.

In order to maintain this traffic, the redirection process was done using tools such as Google Search Console and SEM Rush so that relevant URLs could be raised and redirected to new URLs generated on the VTEX platform, thus preserving existing traffic on the previous platform.

VTEXbook

VTEX The True Cloud Commerce Platform