
Sitecore-Commerce-Docs Documentation

Release 8.2

Brad Christie

October 04, 2016

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This documentation is designed to provide help and clarification about the Sitecore Commerce suite of products. These guides assume you're performing an install on a single server.

Attention: This documentation assumes you have a level of comfort with Sitecore as a product (including acquiring, installing and setting it up as a standalone product). If that isn't the case, please consider signing up for a [training](#) course to familiarize yourself.

Attention: This documentation is incomplete and should be considered a work in progress.

Introduction

This guide will walk you through the necessary steps to install and run Sitecore with the Commerce products.

1.1 What is Sitecore Commerce?

By [Brad Christie](#)

A suite of e-commerce products integrated with Microsoft Dynamics Retail AX and the Sitecore Experience Platform, or deployed as a stand-alone solution. Includes The Connect module for integrating 3rd party commerce platforms.

1.2 Target Audience

By [Brad Christie](#)

This guide is designed to target Sitecore Certified Developers and those with prior Sitecore experience.

1.3 System Requirements

By [Brad Christie](#)

- Hardware (Minimum) Requirements
 - 2.5Ghz processor
 - 8GB RAM
 - NTFS File System with 3GB of free space
- Supported Operating Systems
 - Windows 10
 - Windows Server 2012 R2
 - Windows Server 2012
 - Windows Server 2008 R2 SP1
 - Windows 8.1
 - Windows 7 SP1

- Supported Web Servers
 - IIS 10
 - IIS 8.5
 - IIS 8.0
 - IIS 7.5
- Server Requirements
 - Supported Databases
 - * SQL Server 2014
 - * SQL Server 2012 SP1
 - * SQL Server 2008 R2
 - ASP.NET 4.5 (MVC 5)
 - Microsoft .NET Framework v4.5.1 or above

Getting Started

By Brad Christie

Before we can begin, please ensure *Sitecore* is installed. This section briefly outlines the necessary steps to do so.

Sections

- *Prerequisites*
- *Installing Requirements*
 - *Installing IIS*
 - *Installing SQL Server*
 - *Installing MongoDB*
- *Installing Sitecore*
 - *Installing via Installer*
 - *Installing via Sitecore Instance Manager*
 - *Installing via Archive*
- *Next Steps*

2.1 Prerequisites

Sitecore requires the following be setup on your system (or available locally):

- IIS
- Microsoft SQL Server
- MongoDB

Also, ensure you have the following files, which can be found in the [Software Appendix](#), locally:

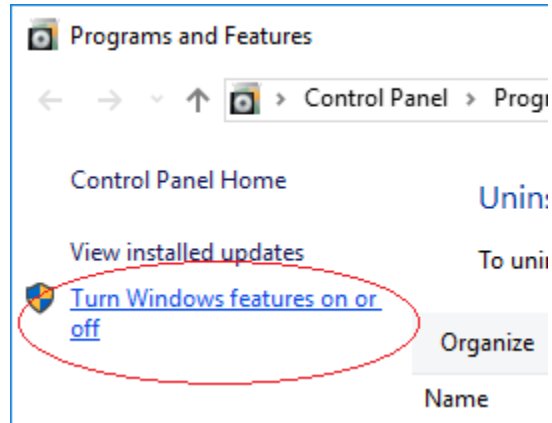
- *Sitecore*
- *Sitecore License*

2.2 Installing Requirements

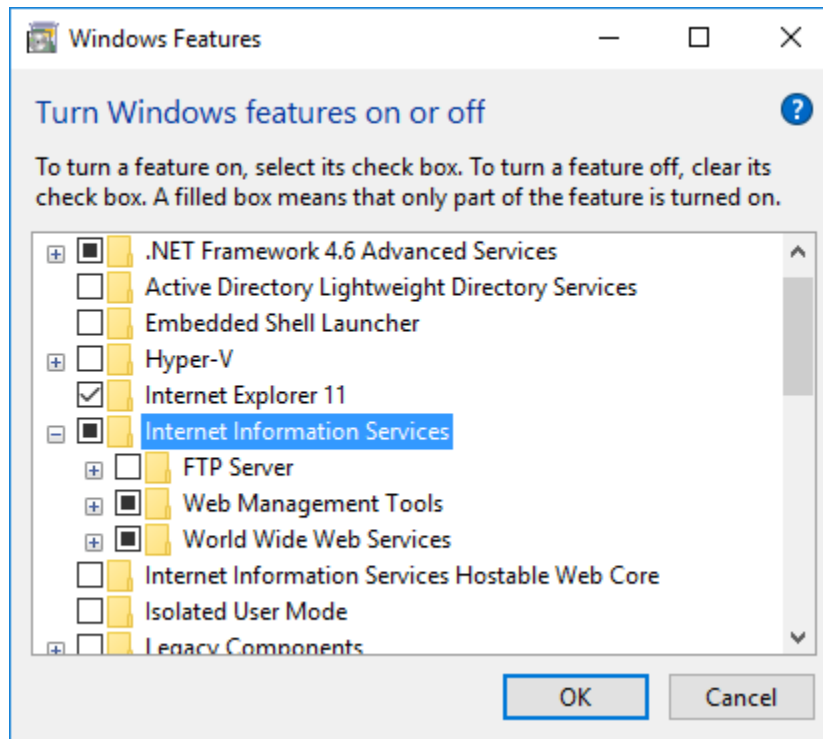
This section details how to get a system with the base requirements setup.

2.2.1 Installing IIS

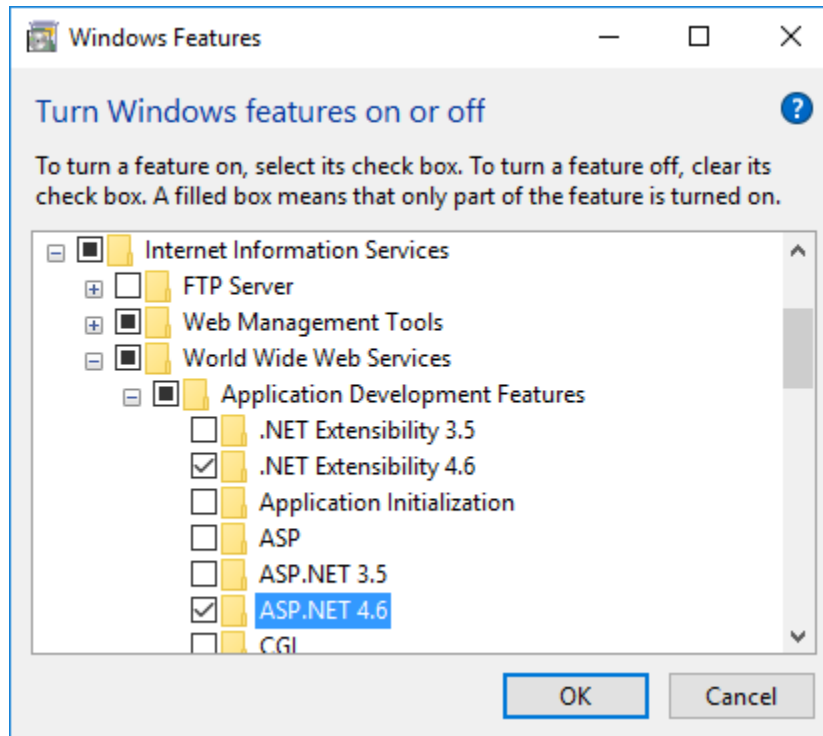
Before we can begin, ensure IIS is installed and running on your system. We'll also want to include development features allowing Sitecore to modify the `web.config` file `<handlers>`. To do so, please goto the application manager and select *Turn Windows Features On or Off*.



Next, select the checkbox next to *Internet Information Services*.



Also, expand to and select the checkbox next to *Internet Information Services* → *World Wide Web Services* → *Application Development Features* → *ASP.NET 4.6*.



Finally, click OK and start the installation.

2.2.2 Installing SQL Server

Download *Microsoft SQL Server* and follow setup instructions.

Todo

Incomplete.

2.2.3 Installing MongoDB

Download *MongoDB* and follow the setup instructions. Next, either run MongoDB as a stand-alone application as necessary (by executing `mongod.exe` on-demand), or setup a working environment and run MongoDB as a [Windows Service](#) by running commands similar to the following:

```
@ECHO OFF

REM Root directory to store database and log files to
SET MONGOD_DIR=C:\data

REM Create the directory if it doesn't already exist
IF NOT EXIST "%MONGOD_DIR%" (
    MKDIR "%MONGOD_DIR%"
)

REM Navigate to that directory
PUSHD "%MONGOD_DIR%"
```

```
REM Create database and log sub-directories
IF NOT EXIST "db" MKDIR db
IF NOT EXIST "log" MKDIR log

REM Begin setting up the configuration to use the above directories
REM and sub-directories, but only if we don't already have a config
REM file.
SET CFG=%MONGOD_DIR%\mongod.cfg
IF NOT EXIST "%CFG%" (
    ECHO systemLog:>>"%CFG%"
    ECHO destination: file>>"%CFG%"
    ECHO path: %CD%\log\mongod.log>>"%CFG%"
    ECHO storage:>>"%CFG%"
    ECHO dbPath: %CD%\db>>"%CFG%"
)
POPD

REM Begin the setup; Instruct mongo to use the cfg file and directories
REM to store all data while it's ran as a service.
mongod --config "%CFG%" --install

REM Configure the service as auto-start.
sc config MongoDB start= delayed-auto

REM Start the windows service.
NET START MongoDB

POPD
```

2.3 Installing Sitecore

Next, we need to install Sitecore. Please make sure you have the following files and/or pieces of information handy before proceeding:

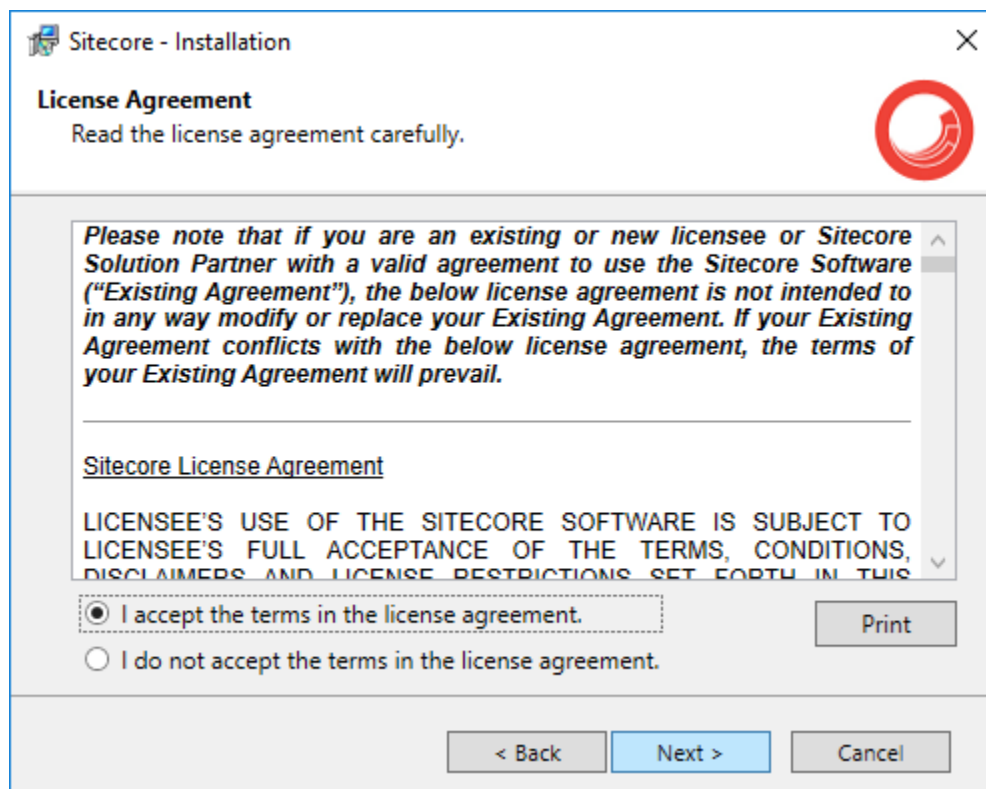
- *Sitecore License*
- Connection details to your SQL database.
- Connection details to your MongoDB database.

2.3.1 Installing via Installer

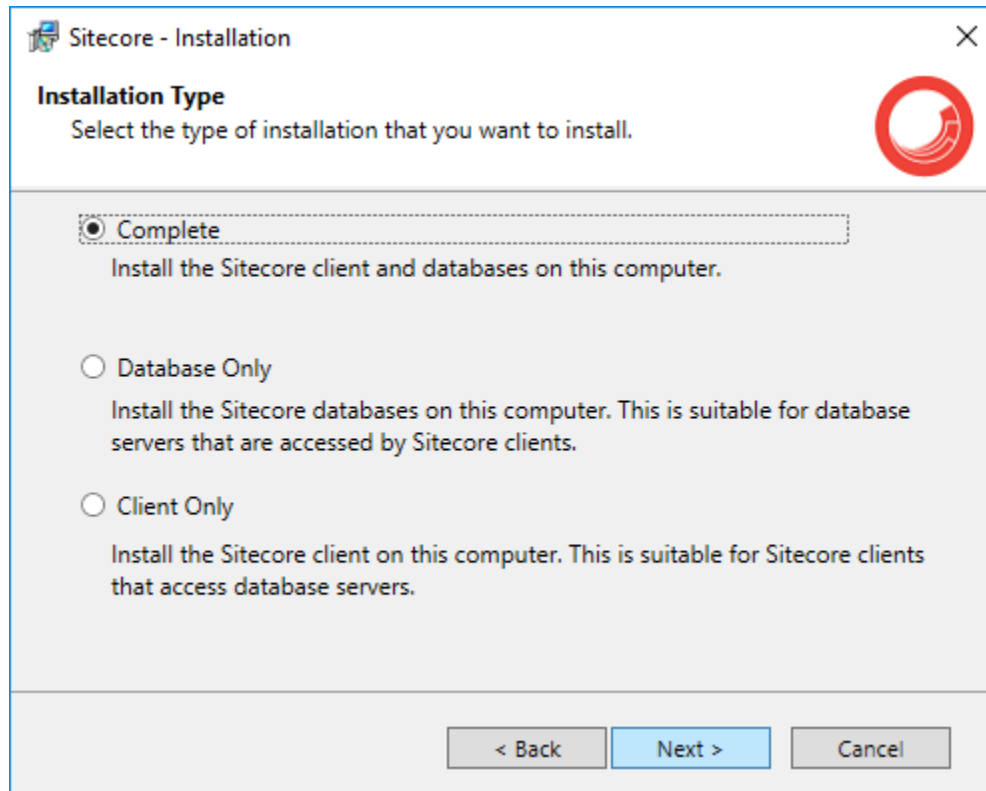
1. Extract the .zip file containing the installer to the directory of your choice.
2. Start the exe and follow the steps provided
 1. Begin installation by clicking next



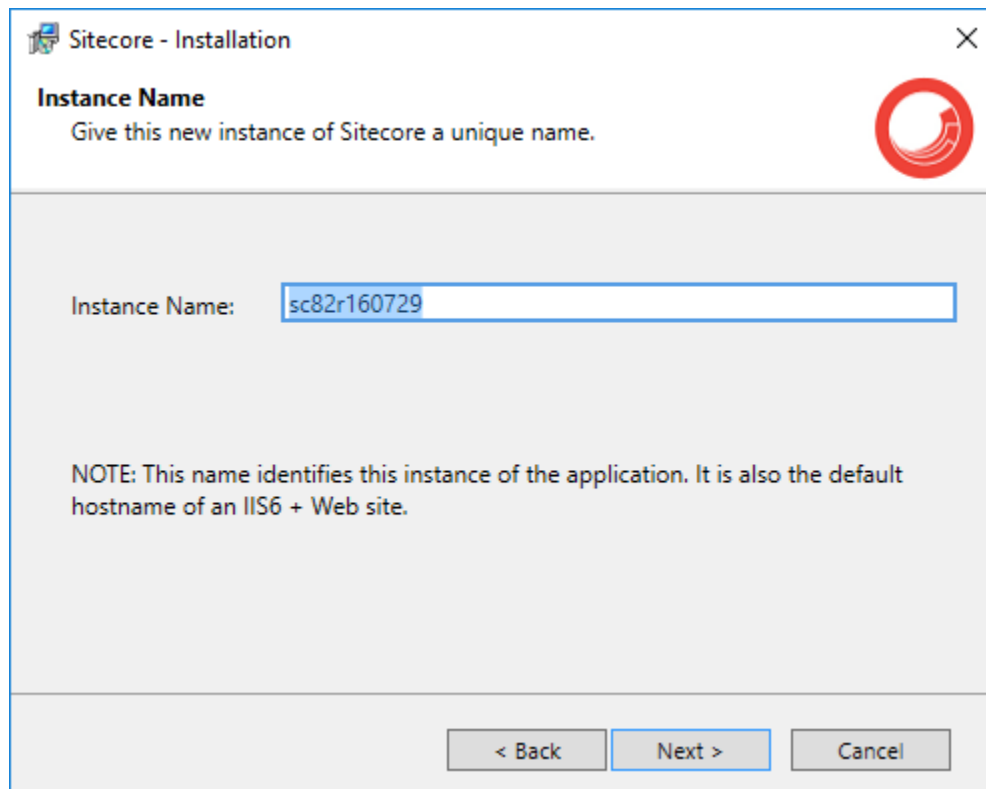
2. Agree to the terms of the license agreement, then click next



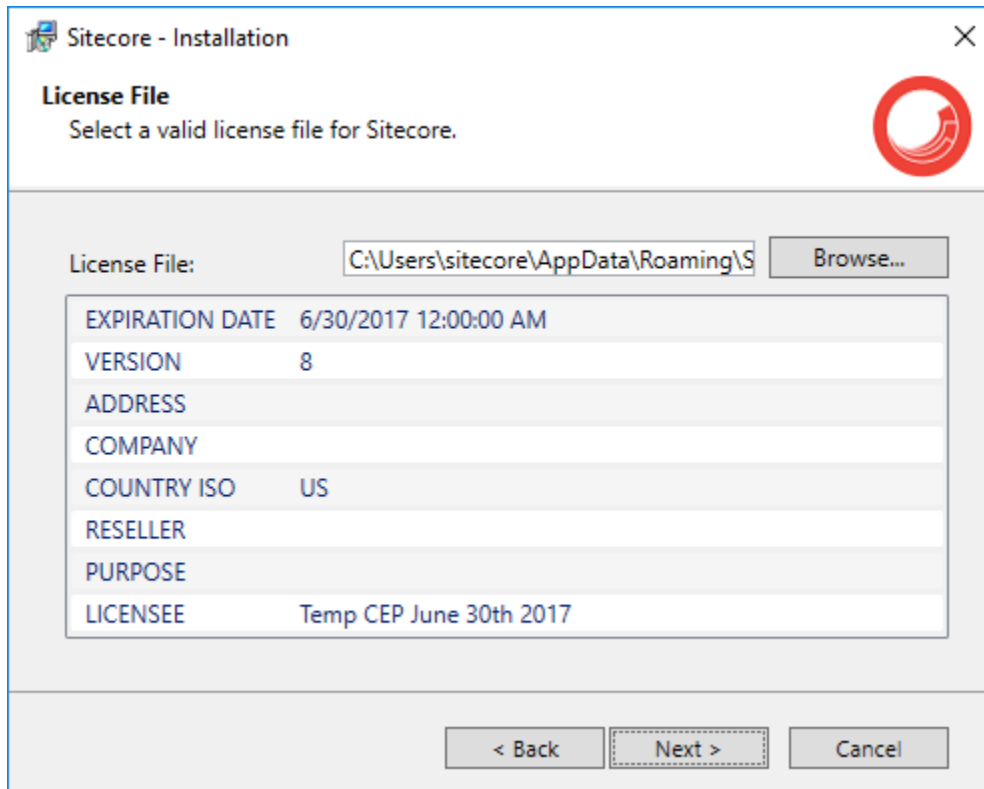
3. Select Complete installation, then click next



4. Give the instance a name, then click next



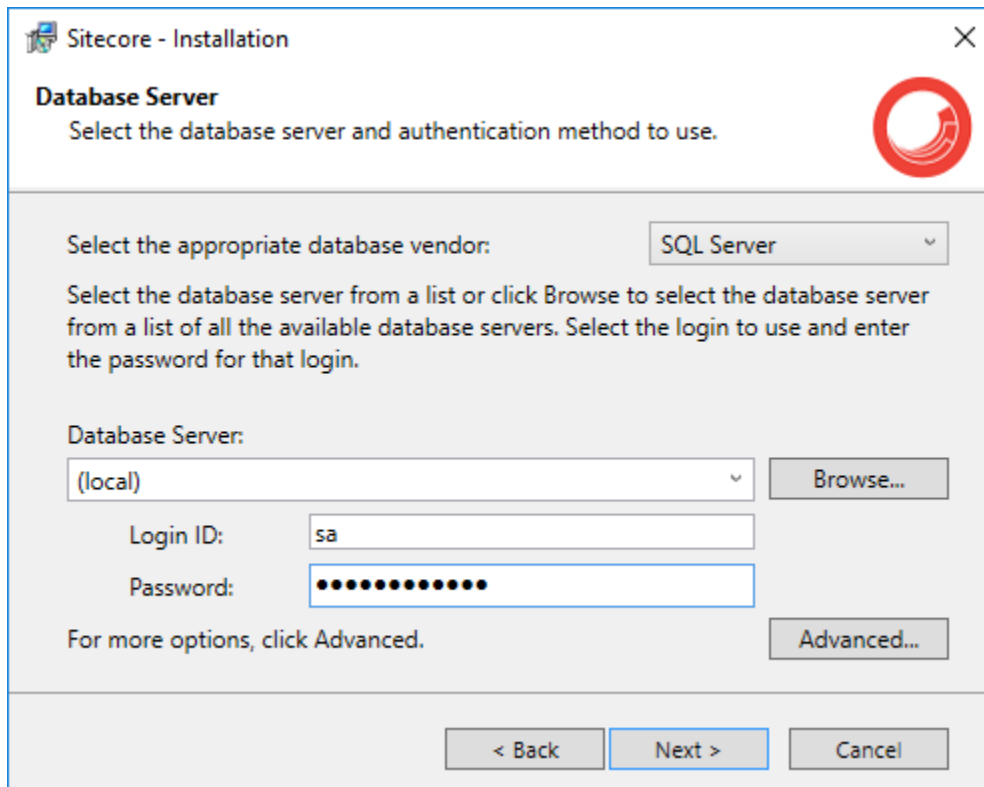
5. Select a valid license file, then click next



The dialog box is titled "Sitecore - Installation" and has a red circular logo in the top right corner. The main heading is "License File" with the instruction "Select a valid license file for Sitecore." Below this, there is a text field for "License File:" containing the path "C:\Users\sitecore\AppData\Roaming\S" and a "Browse..." button. A table displays license details: EXPIRATION DATE (6/30/2017 12:00:00 AM), VERSION (8), ADDRESS, COMPANY, COUNTRY ISO (US), RESELLER, PURPOSE, and LICENSEE (Temp CEP June 30th 2017). At the bottom are "< Back", "Next >" (highlighted with a dashed border), and "Cancel" buttons.

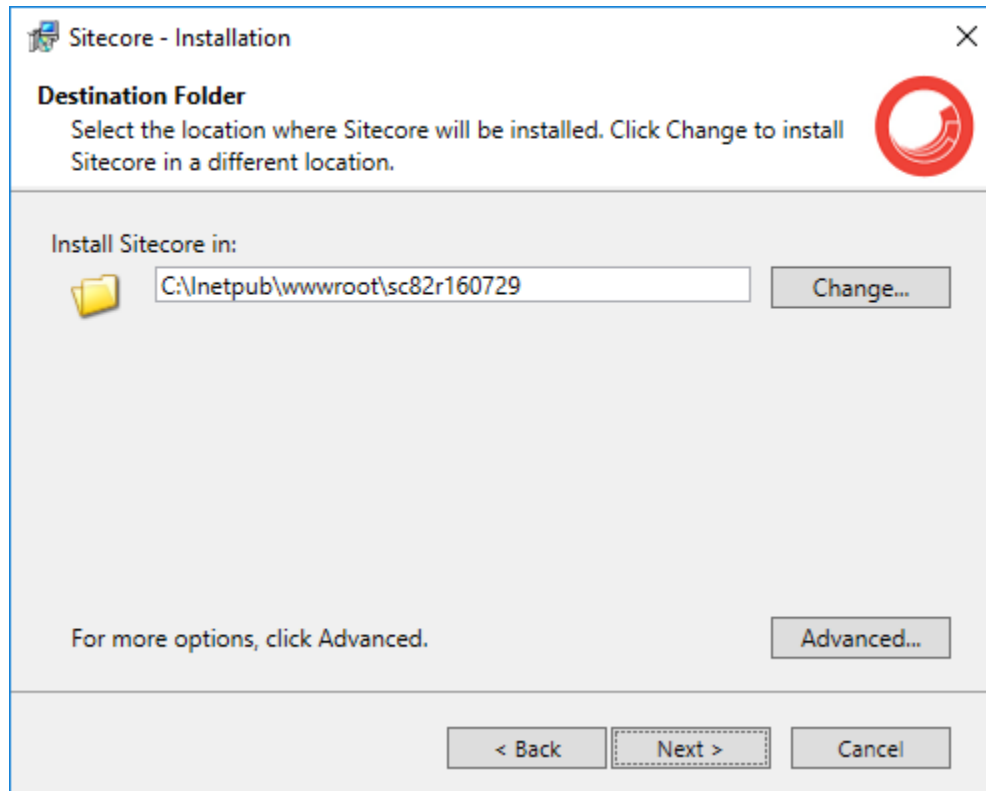
EXPIRATION DATE	6/30/2017 12:00:00 AM
VERSION	8
ADDRESS	
COMPANY	
COUNTRY ISO	US
RESELLER	
PURPOSE	
LICENSEE	Temp CEP June 30th 2017

6. Enter SQL Server credentials, then click next

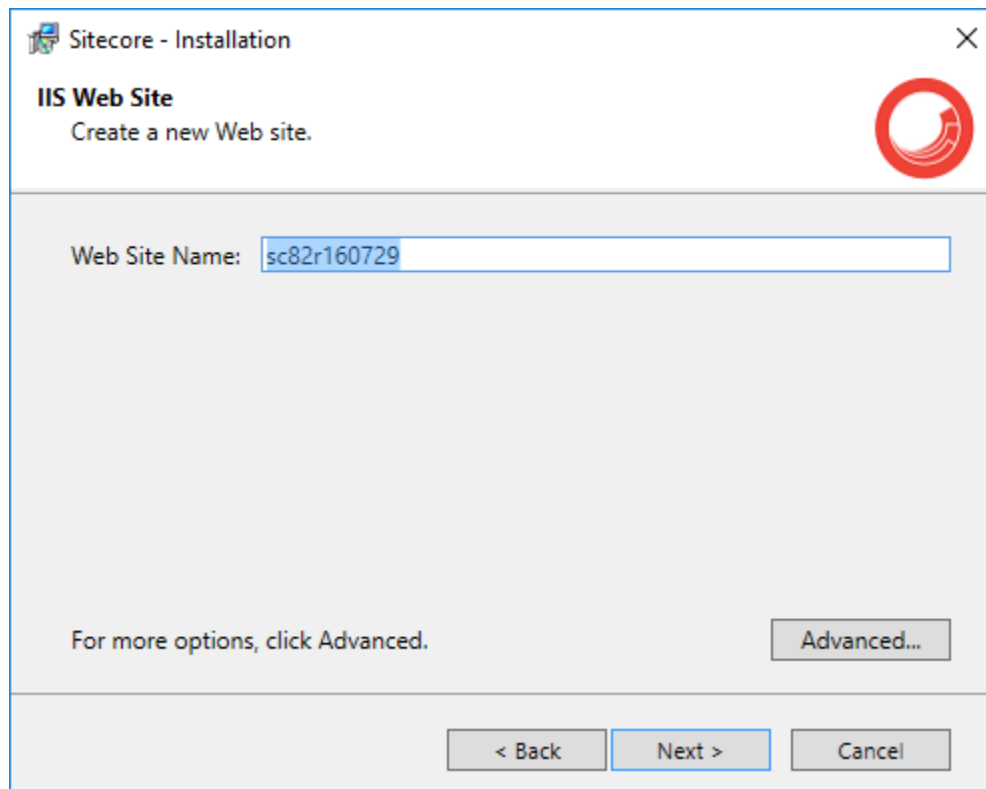


The dialog box is titled "Sitecore - Installation" and has a red circular logo in the top right corner. The main heading is "Database Server" with the instruction "Select the database server and authentication method to use." Below this, there is a dropdown menu for "Select the appropriate database vendor:" set to "SQL Server". A paragraph explains: "Select the database server from a list or click Browse to select the database server from a list of all the available database servers. Select the login to use and enter the password for that login." There is a "Database Server:" dropdown set to "(local)" and a "Browse..." button. Below are fields for "Login ID:" (sa) and "Password:" (masked with dots). An "Advanced..." button is also present. At the bottom are "< Back", "Next >" (highlighted with a dashed border), and "Cancel" buttons.

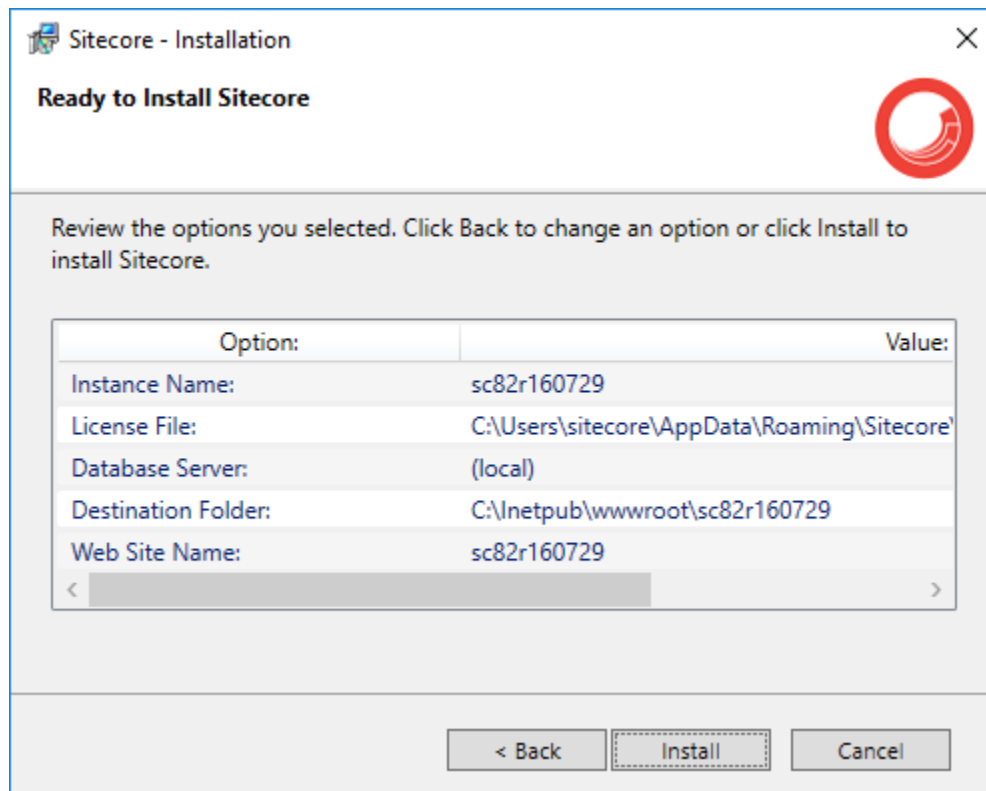
7. Select install location, then click next



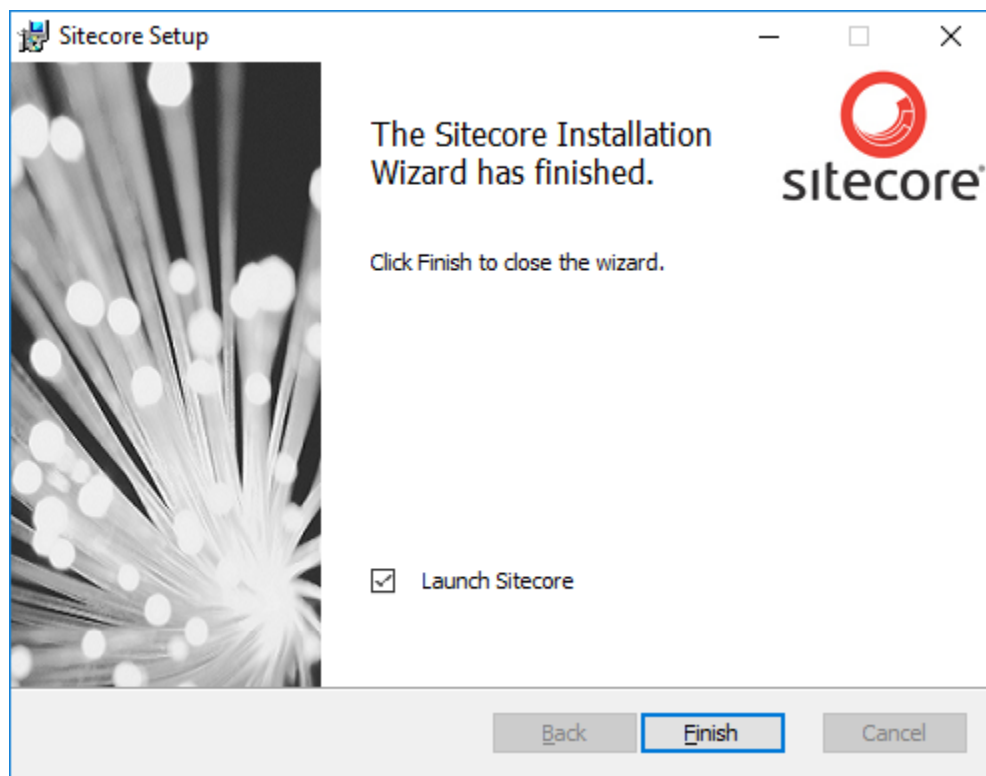
8. Give the website a name, then click next



9. Review everything and confirm accuracy, then click next

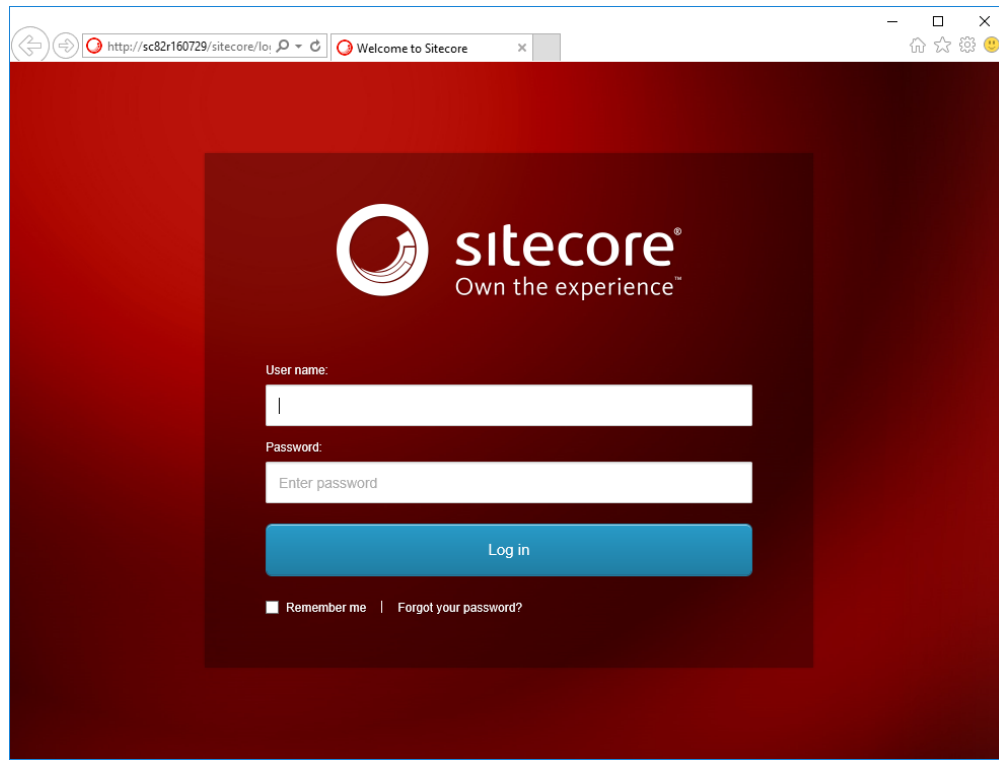


10. Finished.



Hint: It's a good idea to select "Launch Sitecore" before exiting to confirm everything went

well. If there weren't any errors, you should see:



2.3.2 Installing via Sitecore Instance Manager

Todo

Incomplete, but you're obviously a power user if you're using SIM—you'll do fine. ;-)

2.3.3 Installing via Archive

Todo

Incomplete, but you're a computer guru. You should be writing this, not me.

2.4 Next Steps

- [Installing Commerce Connect](#)

3.1 Installing Commerce Server

By Brad Christie

This article walks you through installing *Commerce Server*.

Sections:

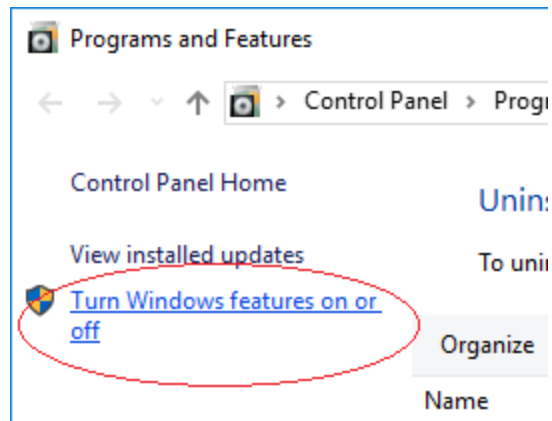
- *Prerequisites*
- *Pre-Installation*
- *Installation*
- *Pre-Configuration*
 - *Accounts and Roles*
 - * *Commerce Server User and Service Accounts*
 - * *Commerce Server Groups and Account Assignments*
 - * *Commerce Server Web Application Accounts*
- *Configuration*
- *More Information*

3.1.1 Prerequisites

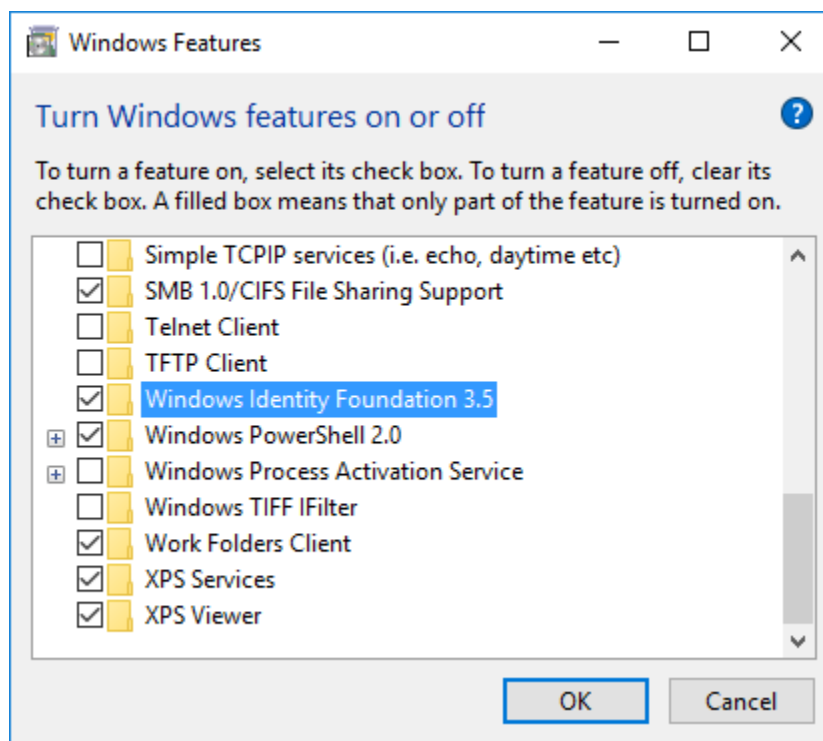
Before beginning this guide ensure you've followed our [Getting Started](#) guide. Also, make sure you've downloaded *Commerce Server* locally.

3.1.2 Pre-Installation

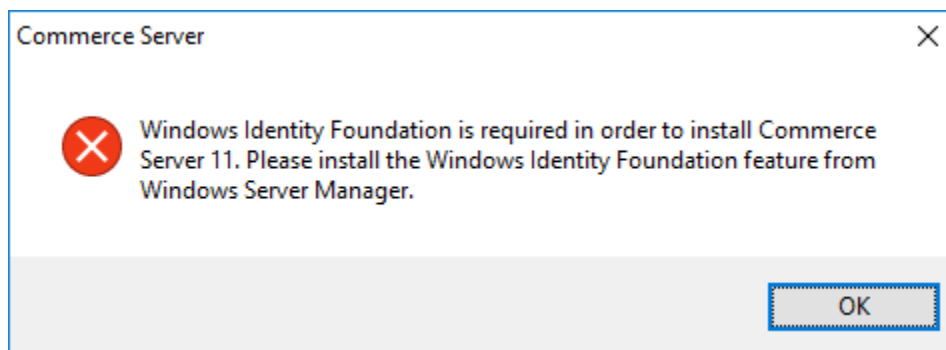
Commerce Server requires Windows Identity Foundation to be installed. To do so, please goto the application manager and select "Turn Windows Features On or Off".



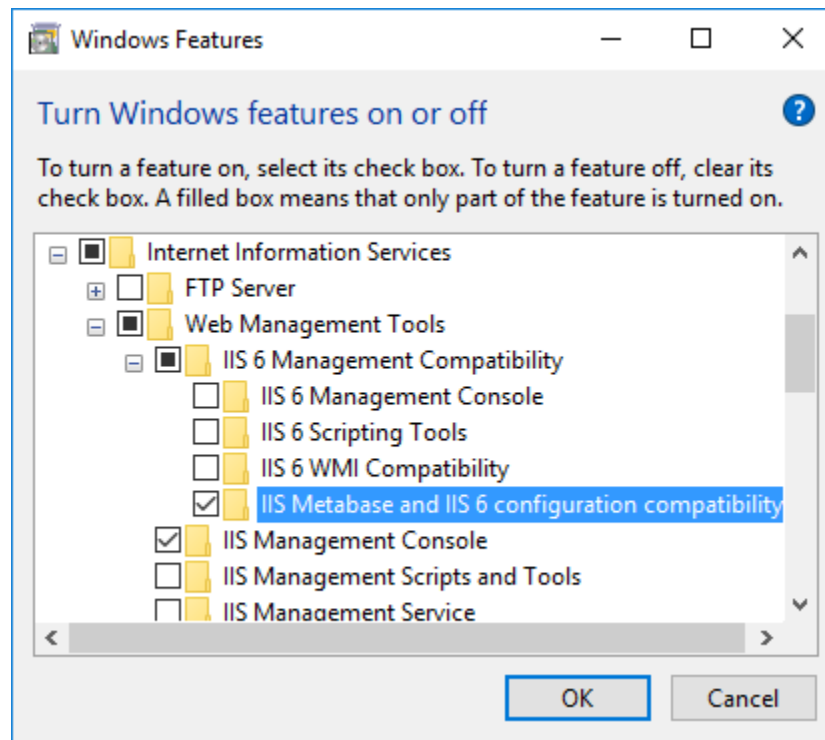
Next, select the checkbox next to *Windows Identity Foundation*



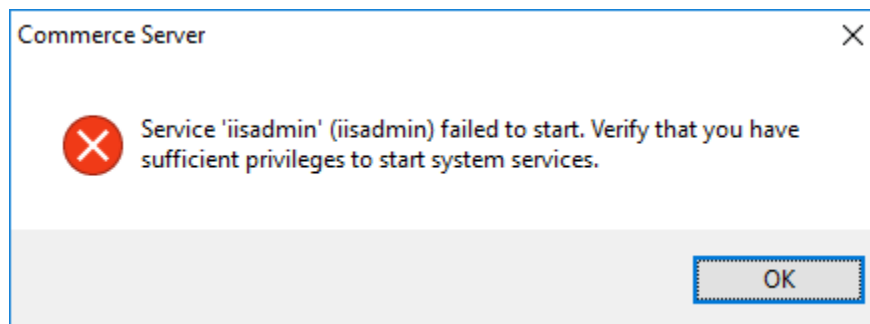
Tip: Why WIF? Because if you don't, you'll see an error while installing letting you know it's required.



Also, select the checkbox next to *IIS Metabase and IIS 6 configuration compatibility*



Tip: Why Metabase & IIS 6 compatibility? Because if you don't you'll see an error in the install phase regarding access to `iisadmin`.

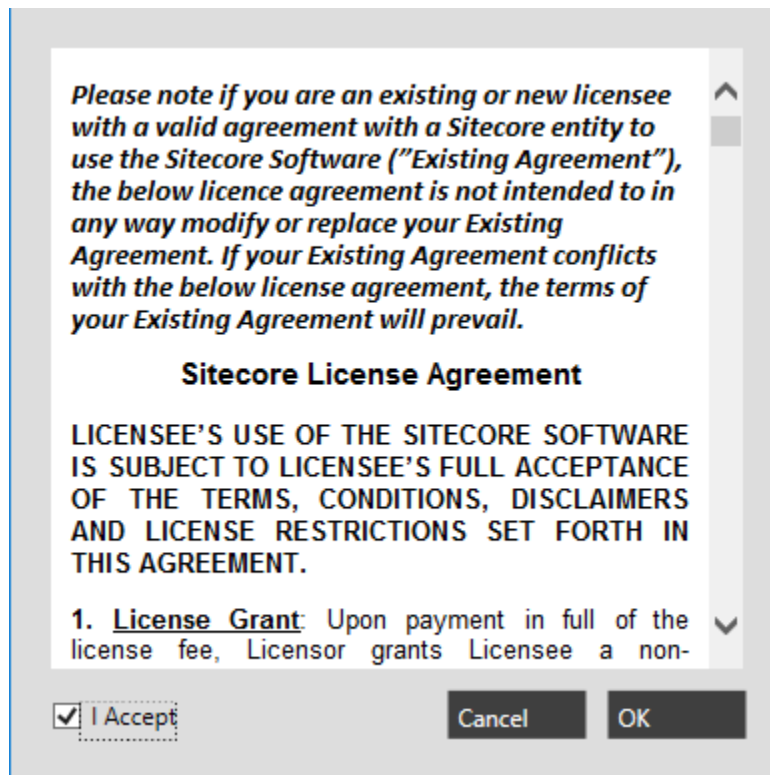


3.1.3 Installation

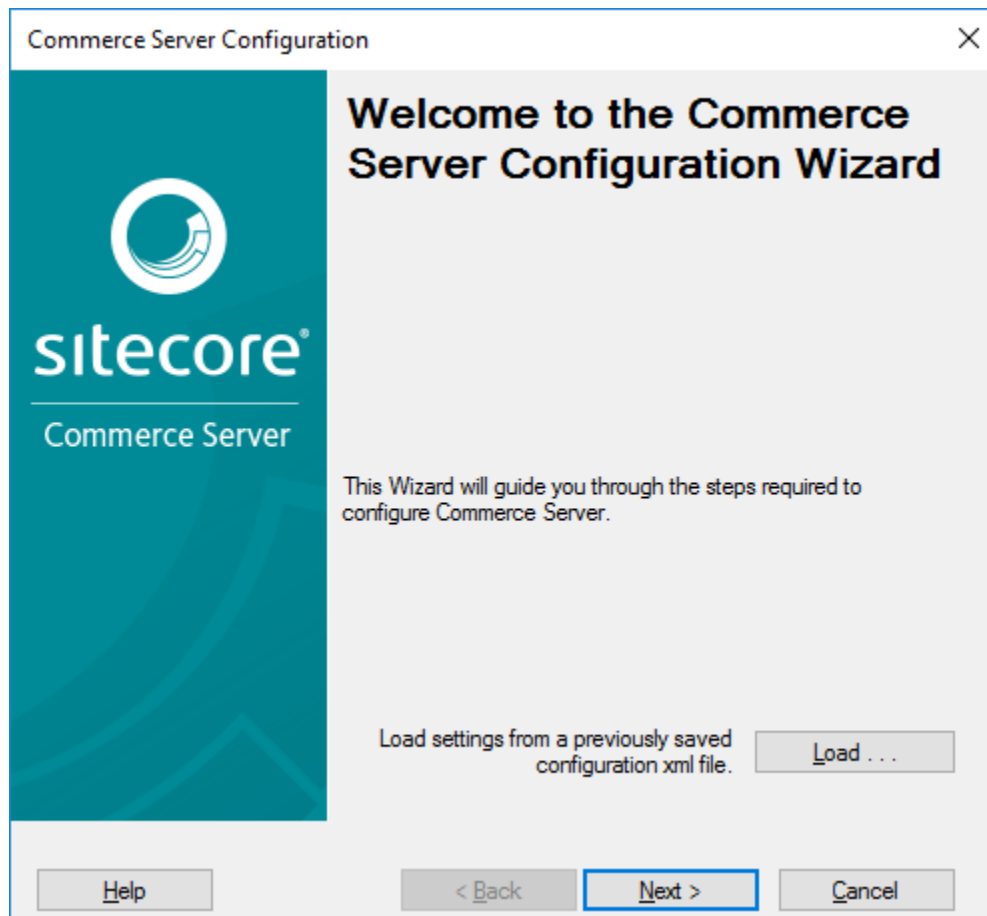
1. Run the installer, and click install



2. Agree to the terms of the license agreement, then click OK



3. Once finished, the configuration window will appear. At this point you may either continue on (and continue on from the **Pre-Configuration** section below), or close it and return back to it later.



Tip: Though configuration is kicked off immediately after an install, it can be picked back up again. Simply close the configuration window and go about your business. When you're ready, you can access it again using "Configuration Wizard" located under "Commerce Server" in your start menu.

4. Sitecore Commerce Server is now installed.



3.1.4 Pre-Configuration

Accounts and Roles

This topic provides a summary of the user accounts and groups that you create. In a multi-server deployment, Sitecore Commerce accounts and user groups must be created on the domain controller. In a single-server deployment, you can create these accounts and groups on the computer where Sitecore Commerce is installed. For the internal test and development environments, create the same accounts and groups that you create for the data domain in the production environment.

In a multi-computer deployment, Sitecore Commerce accounts and user groups must be created on the domain controller. In a single-server deployment, you can create these accounts and groups on the computer where Sitecore Commerce is installed. For the internal test and development environments, create the same accounts and groups that you create for the data domain in the production environment.

See the following sections for the account and group requirements for each of these areas:

- Commerce Server User and Service Accounts
- Commerce Server Groups and Account Assignments
- Additional User Groups for Granular Security
- SQL Server Database Instances, Accounts, and Role User Mappings

Commerce Server User and Service Accounts

The following table lists the accounts that are created or that you create when you install the prerequisite software. You must create the <CS Installer>, <CS Staging User>, CSLOB, and RunTimeUser accounts before you install *Commerce*

Server. After installation, you will create SQL Server Login accounts, and associate the user accounts with Windows user groups.

Account Role	Description	Windows User Group(s)	SQL Server Account
<CS Installer>	Account of person logged on to install & configure Commerce Server.	Administrator, CatalogAdminGroup, MarketingAdminGroup, OrdersAdminGroup	n/a
<CS Staging User>	Account of person who manages Commerce Server Staging.	n/a	<CS Staging User>
CSLOB	Commerce Server Adapters identity.	n/a	n/a
CSSStageSvc	Commerce Server Staging (CSS) service identity	CSS_SG, CSS Administrators, CSS Operators	CSSStageSvc

Commerce Server Groups and Account Assignments

Commerce Server Administrator Groups

Create the four administrator groups that are listed in the following table. These are the minimum number of groups to define. Create separate user groups based on your business needs, and then assign those groups to authorization roles through the Authorization Manager. For more information, see *Authorizing Users and Groups to Access Web Services*.

User Group	Description	Accounts to assign
CatalogAdmin-Group	Administrator group for the Catalog and Inventory Web services.	<CS Installer>, Business User Accounts
MarketingAdmin-Group	Administrator group for the Marketing Web services.	<CS Installer>, Business User Accounts
OrdersAdmin-Group	Administrator group for the Orders Web services.	<CS Installer>, Business User Accounts
ProfilesAdmin-Group	Administrator group for the Profiles Web services.	<CS Installer>, Business User Accounts

Commerce Server Web Application Accounts

Use the Service user accounts for the Sitecore Commerce web applications to perform the following tasks:

- To run Internet Information Services (IIS) application pools.
- To help secure folders.
- To establish anonymous access to the Web site.
- To access the Commerce Server databases.

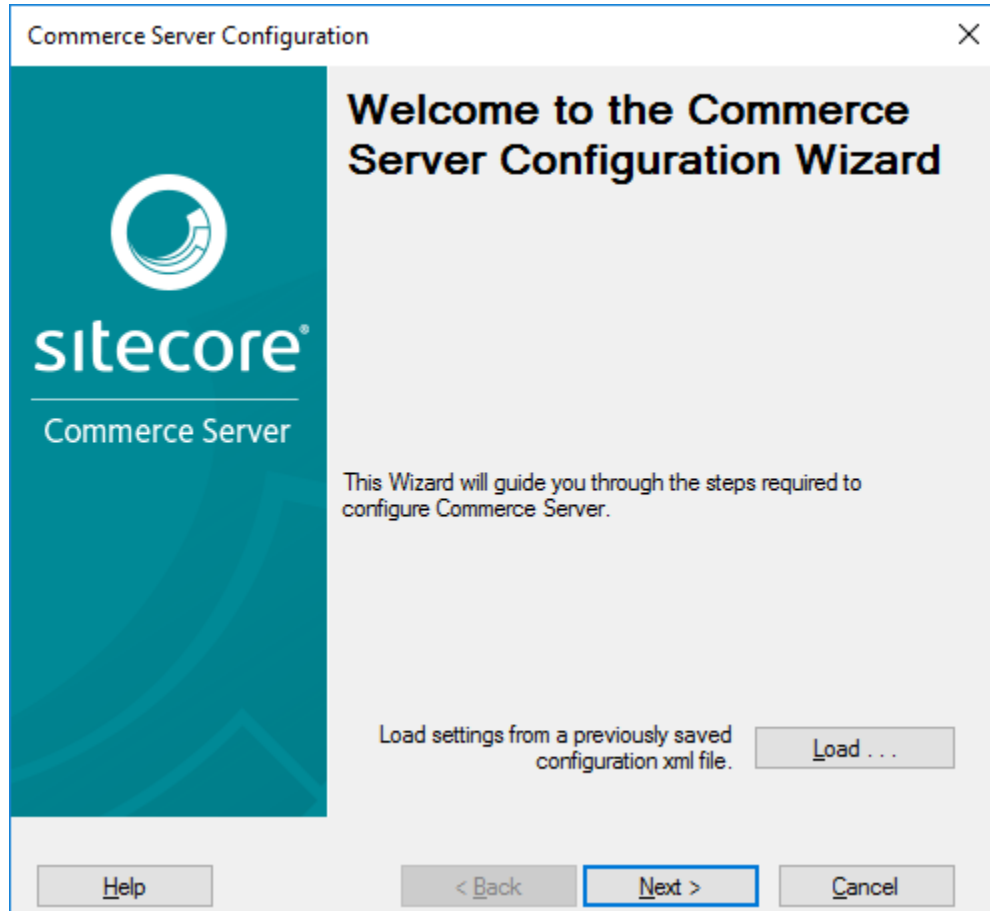
Commerce Server creates the Web applications when you unpack a Commerce Server site, and select the Web services that you want to install. Each Commerce Server Web application requires the definition of a Windows user account and a Windows user group.

Create the following accounts and user groups on the data tier domain controller, and make assignments before or after you install Commerce Server. Also create the RunTimeUser account on the Data tier domain controller. The following table lists the default names that are used in this deployment guide:

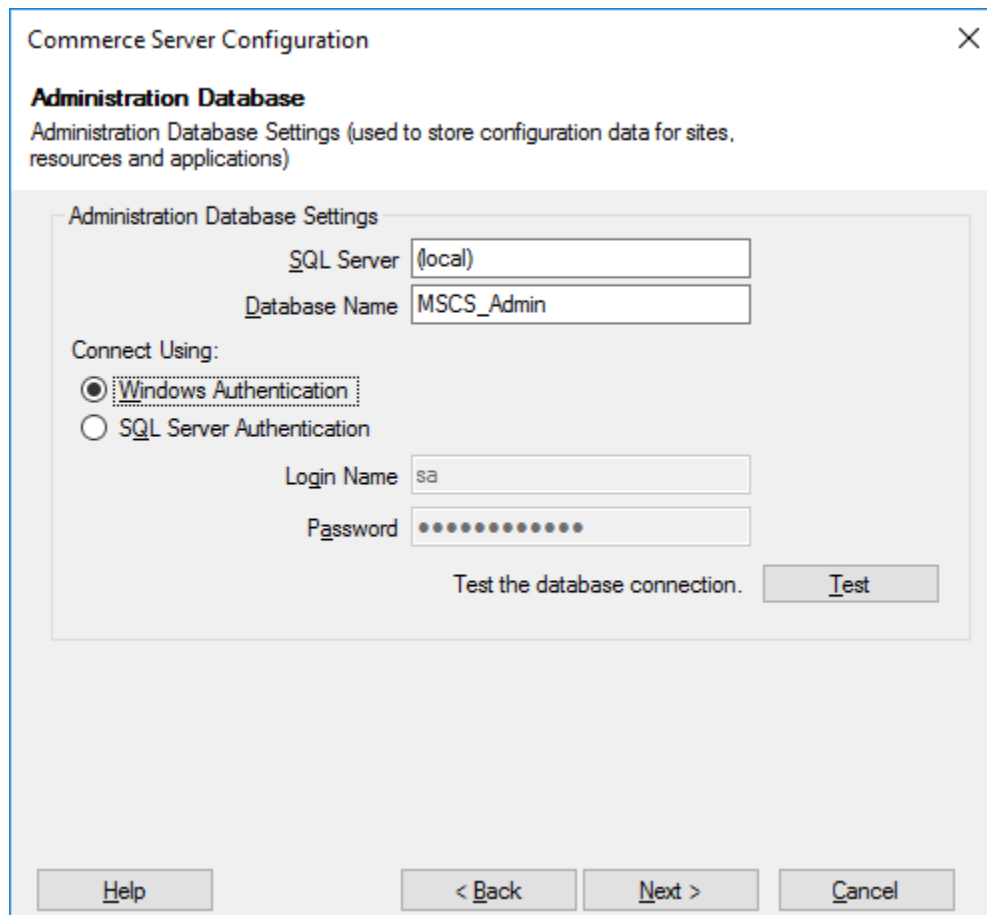
Account name	Description
RunTimeUser	The account to run the Sitecore site application pool.
CatalogWebSvc	The account to run the Catalog web service application pool.
MarketingWebSvc	The account to run the Marketing web service application pool.
OrdersWebSvc	The account to run the Orders web service application pool.
ProfilesWebSvc	The account to run the Profiles web service application pool[JV1].

3.1.5 Configuration

1. To begin, click next



2. Configure your SQL connection, then click next



The image shows a 'Commerce Server Configuration' dialog box with a title bar and a close button. The main section is titled 'Administration Database' and contains a subtitle 'Administration Database Settings (used to store configuration data for sites, resources and applications)'. Below this is a group box 'Administration Database Settings' containing several fields: 'SQL Server' with the value '(local)', 'Database Name' with the value 'MSCS_Admin', and a 'Connect Using:' section with two radio buttons: 'Windows Authentication' (selected) and 'SQL Server Authentication'. Below the radio buttons are fields for 'Login Name' with the value 'sa' and 'Password' with masked characters. A 'Test' button is next to the password field. At the bottom of the dialog are four buttons: 'Help', '< Back', 'Next >', and 'Cancel'.

Commerce Server Configuration

Administration Database
Administration Database Settings (used to store configuration data for sites, resources and applications)

Administration Database Settings

SQL Server (local)

Database Name MSCS_Admin

Connect Using:

☒ Windows Authentication

☐ SQL Server Authentication

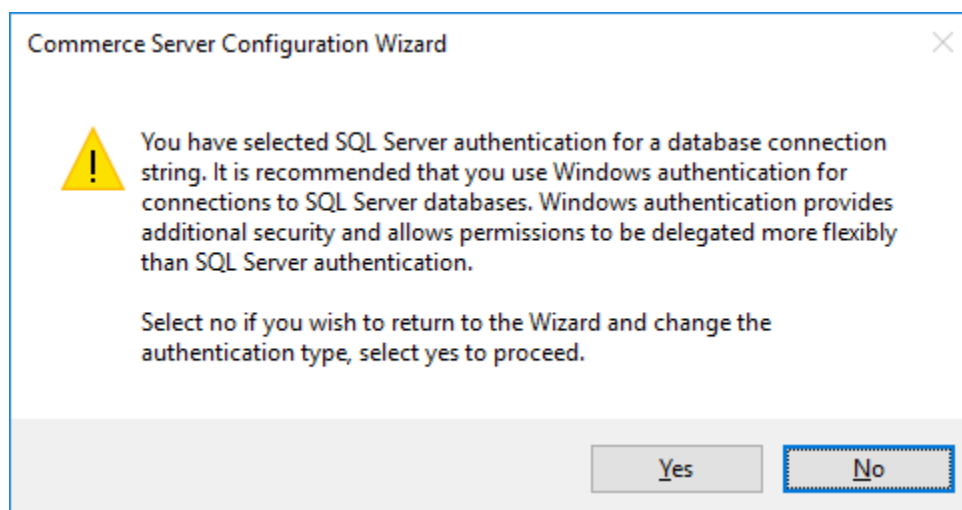
Login Name sa

Password

Test the database connection. Test


Help < Back Next > Cancel

Important: Recommended practice is to use Windows Authentication as the security mechanism.



The image shows a 'Commerce Server Configuration Wizard' dialog box with a title bar and a close button. It contains a yellow warning icon and a message: 'You have selected SQL Server authentication for a database connection string. It is recommended that you use Windows authentication for connections to SQL Server databases. Windows authentication provides additional security and allows permissions to be delegated more flexibly than SQL Server authentication. Select no if you wish to return to the Wizard and change the authentication type, select yes to proceed.' At the bottom are two buttons: 'Yes' and 'No'.

Commerce Server Configuration Wizard

 You have selected SQL Server authentication for a database connection string. It is recommended that you use Windows authentication for connections to SQL Server databases. Windows authentication provides additional security and allows permissions to be delegated more flexibly than SQL Server authentication.

Select no if you wish to return to the Wizard and change the authentication type, select yes to proceed.

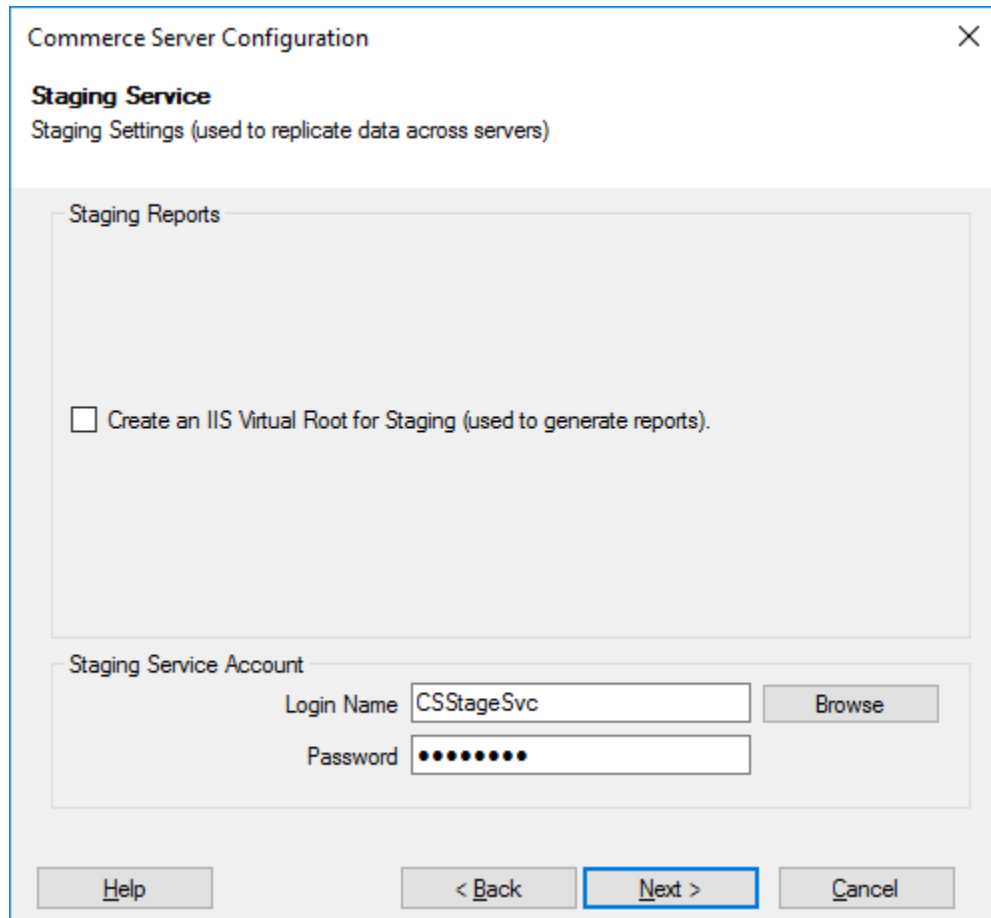
Yes No

Todo

Find out min. permissions required for this account. Assumption is dbo of SQL, but not confident of

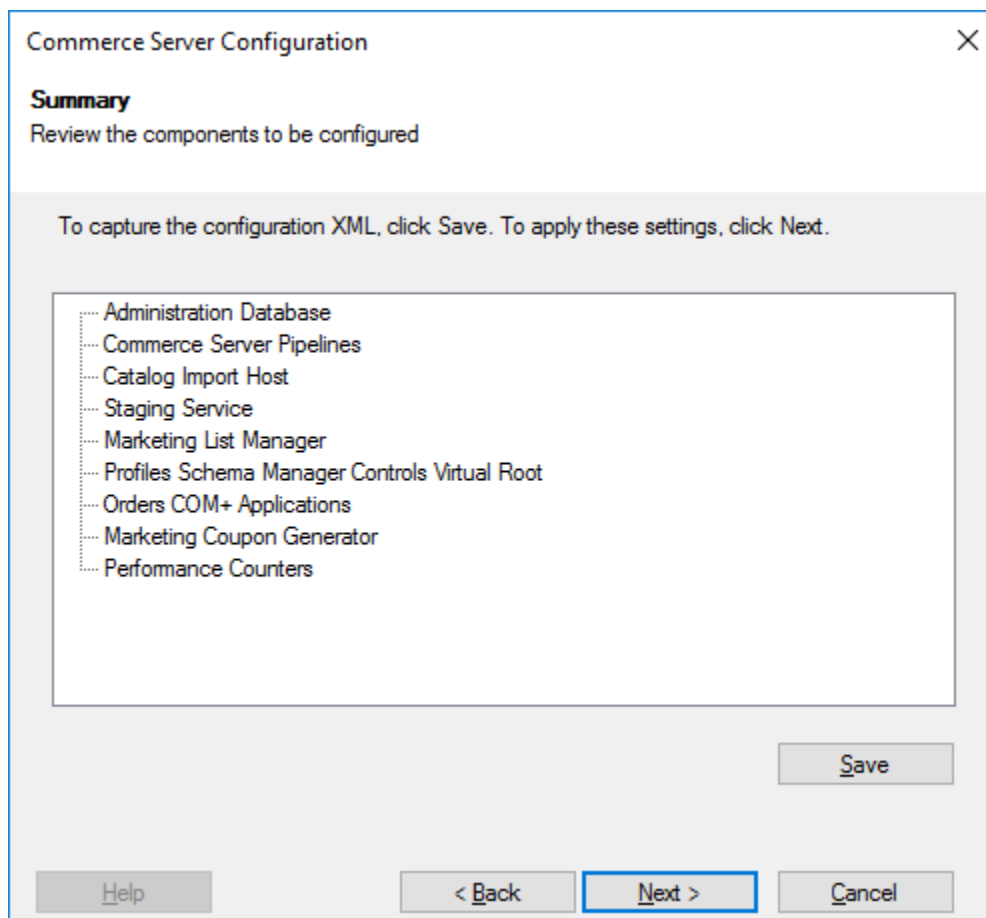
anything else.

3. Configure staging service, then click next

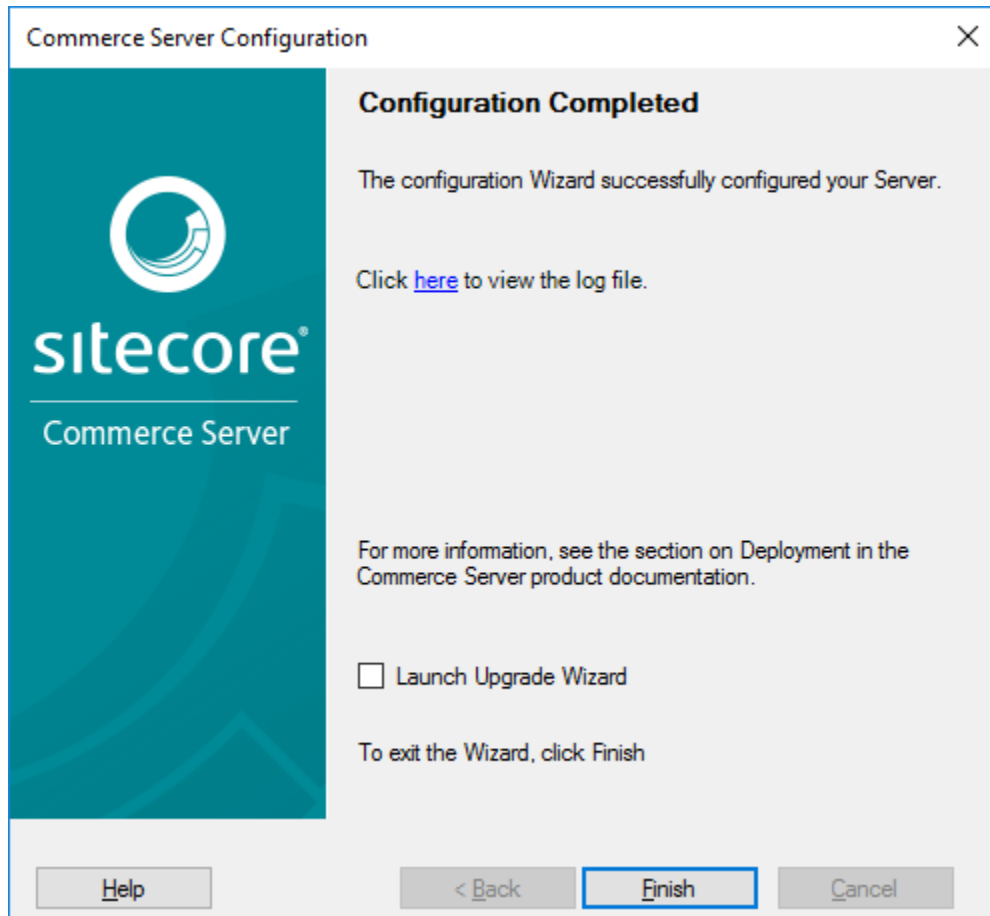


The image shows a 'Commerce Server Configuration' dialog box with a close button (X) in the top right corner. The title is 'Commerce Server Configuration'. Below the title is the section 'Staging Service' with the subtitle 'Staging Settings (used to replicate data across servers)'. The main area is divided into two sections. The first section is 'Staging Reports' and contains a checkbox labeled 'Create an IIS Virtual Root for Staging (used to generate reports)'. The second section is 'Staging Service Account' and contains two input fields: 'Login Name' with the text 'CSStageSvc' and a 'Browse' button to its right, and 'Password' with a masked password field (represented by dots). At the bottom of the dialog box are four buttons: 'Help', '< Back', 'Next >' (which is highlighted with a blue border), and 'Cancel'.

4. Review summary, then click next



5. Installation complete.



Important: Don't launch upgrade wizard!

3.1.6 More Information

See also:

Though this guide aims to be a complete resources, in the event that something has been missed, please check out these additional links. One thing I do ask is **give this document a once-over** before visiting the below links, otherwise this guide isn't serving its purpose.

Installation Information as it relates to running the *Commerce Server* installer.

Pre-Configuration Information detailing the necessary accounts to create before configuring *Commerce Server*

Configuration Guide on configuring *Commerce Server* once it's installed.

3.2 Installing Commerce Connect

By Brad Christie

This article will walk you through installing the *Sitecore Commerce Connect* module.

Sections:

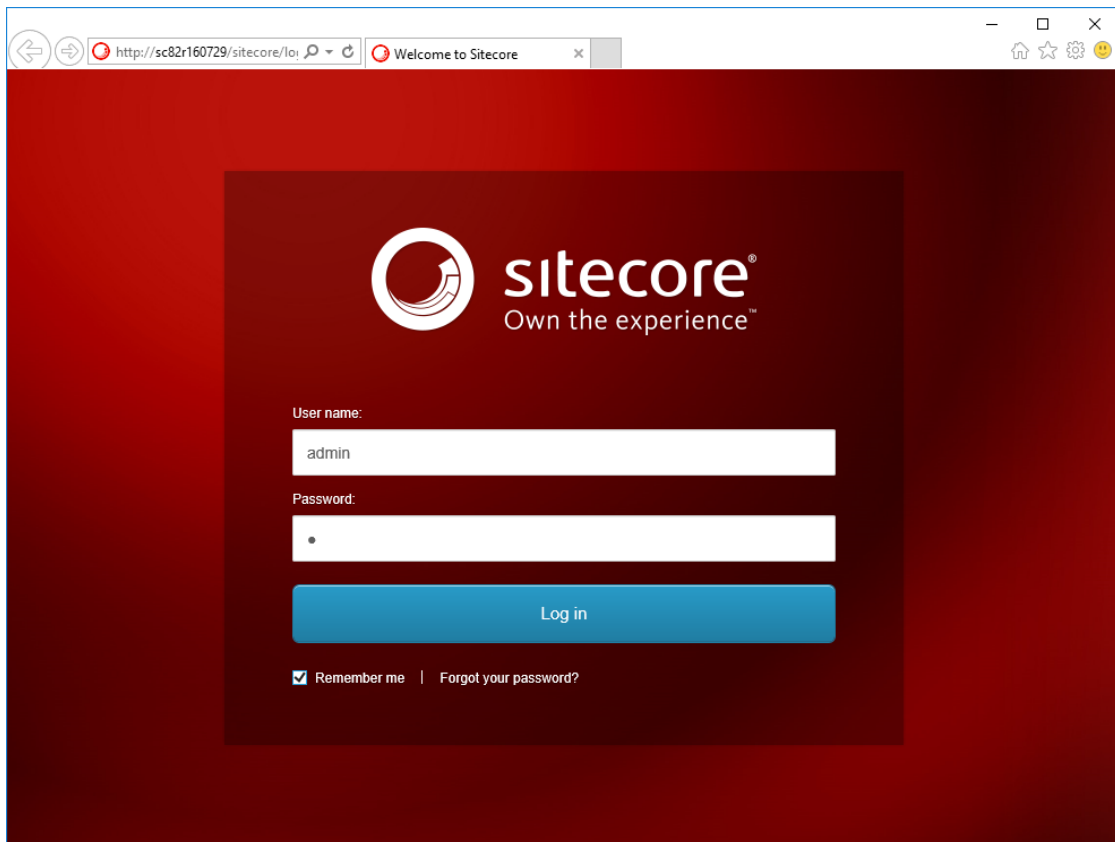
- *Prerequisites*
- *Installation*

3.2.1 Prerequisites

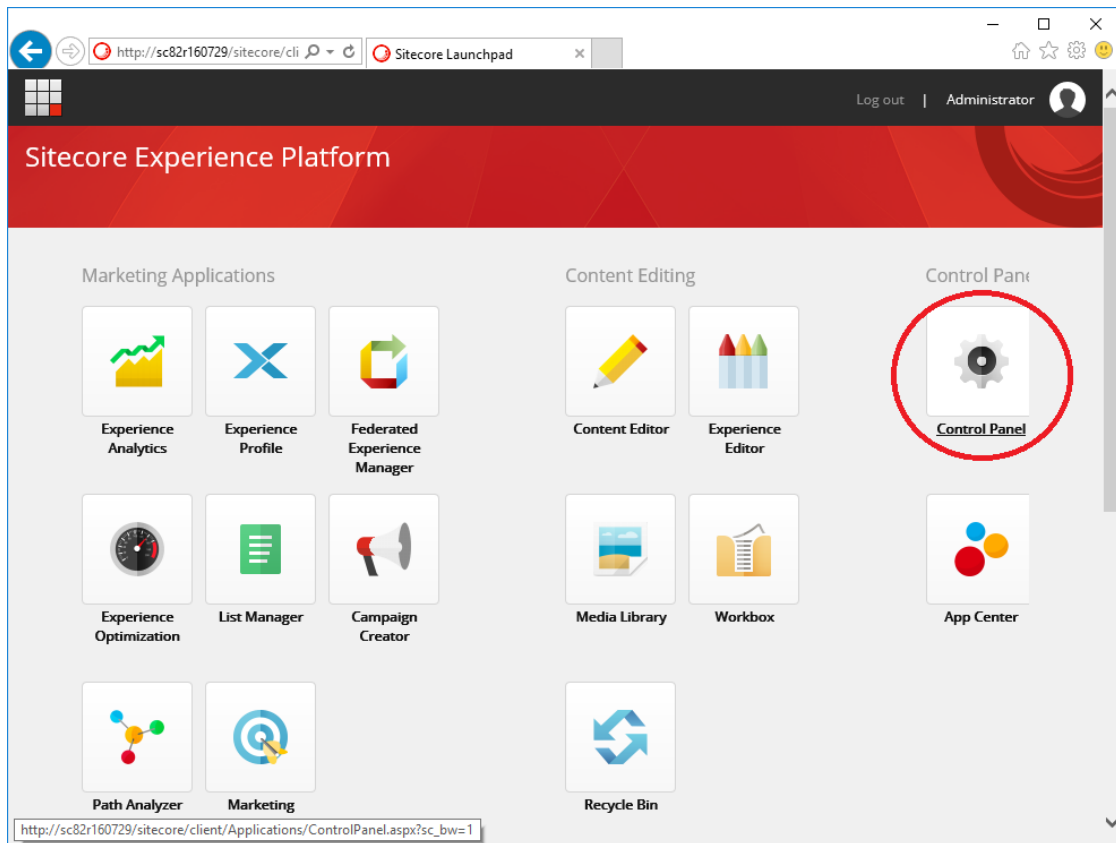
Before beginning this tutorial, ensure you've followed our [Getting Started](#) guide. Also, make sure you've downloaded *Sitecore Commerce Connect* locally since you'll be installing it to your instance of Sitecore.

3.2.2 Installation

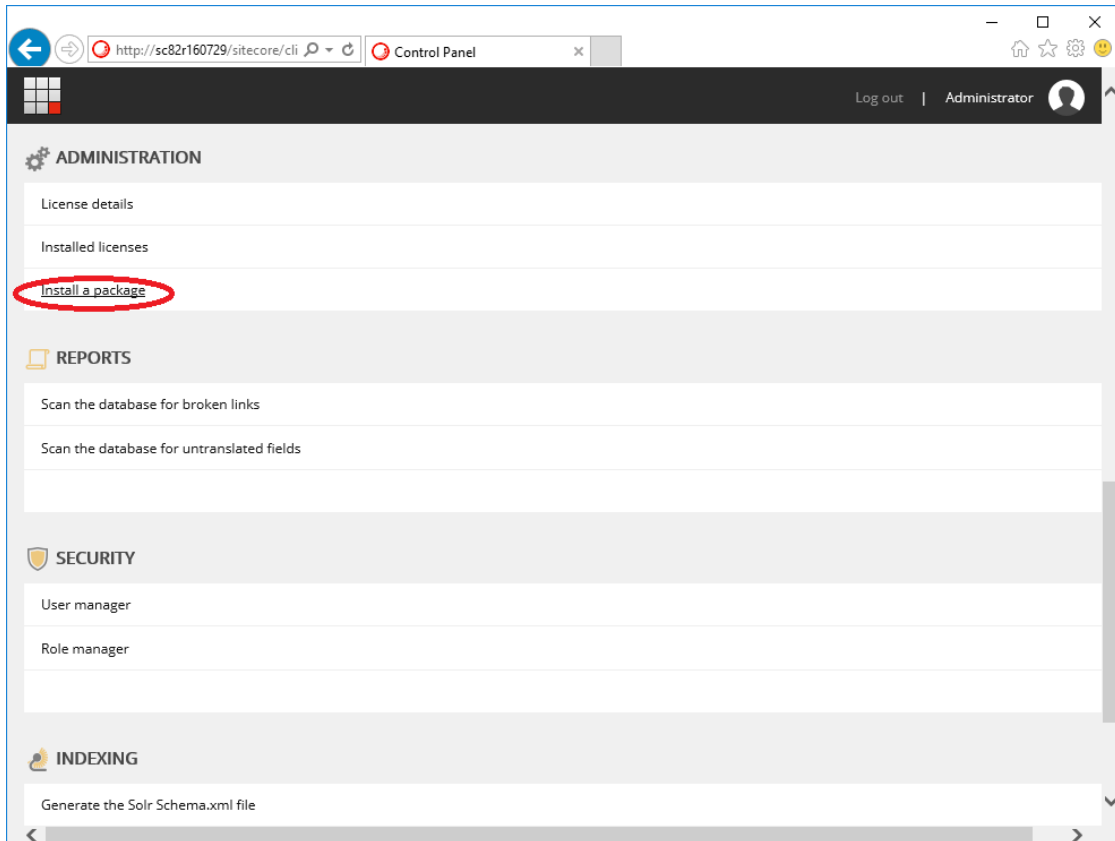
1. First, login to your Sitecore instance if you haven't already.



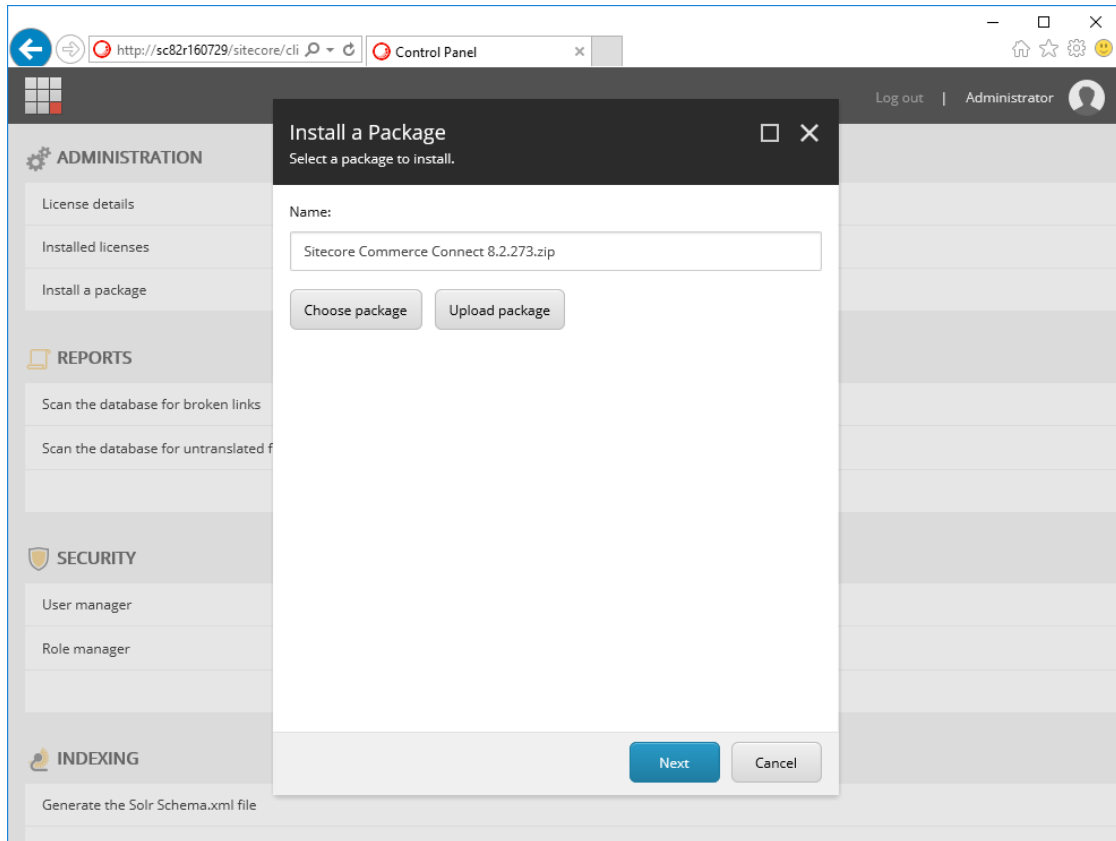
2. Next, open the control panel



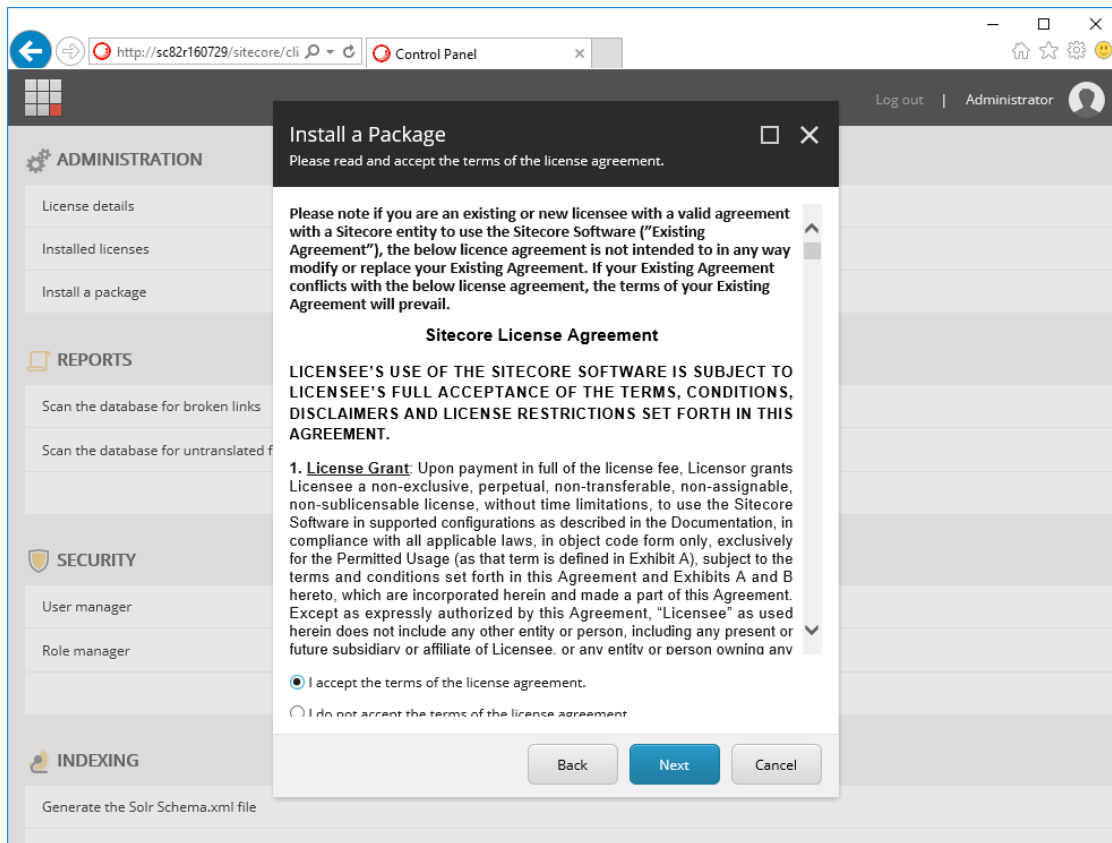
3. Find and click “Install a Package”



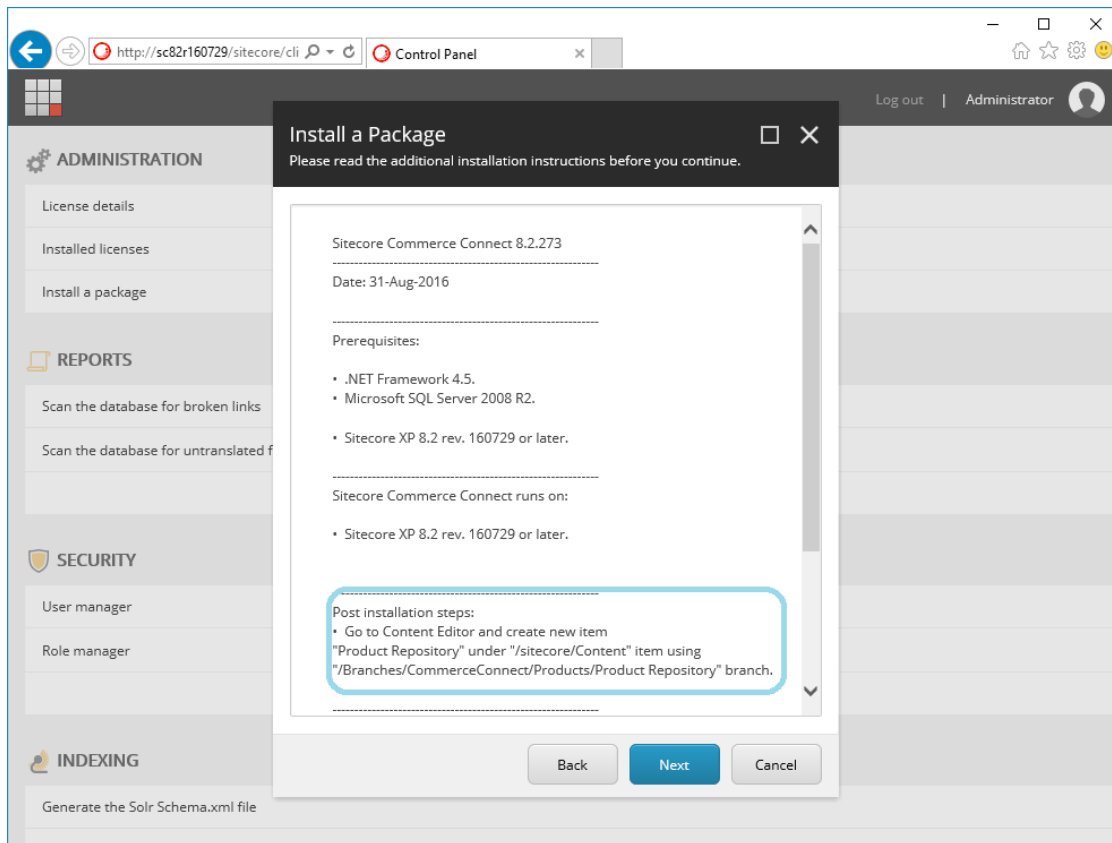
4. Select Upload Package, and browse to and upload the *Sitecore Commerce Connect* package. Once uploaded, select that package and click next.



5. Agree to the terms of the license agreement, then click next.

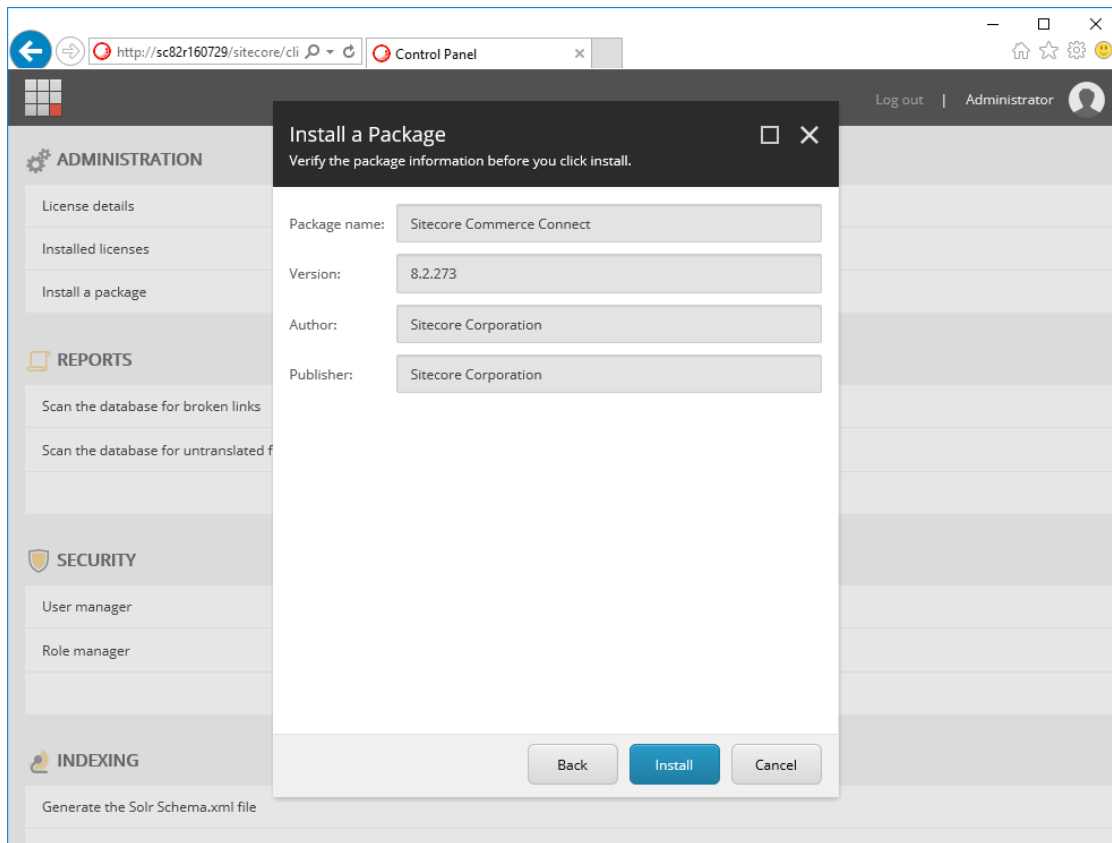


6. Note the additional information, specifically the post-install instructions, then click next.

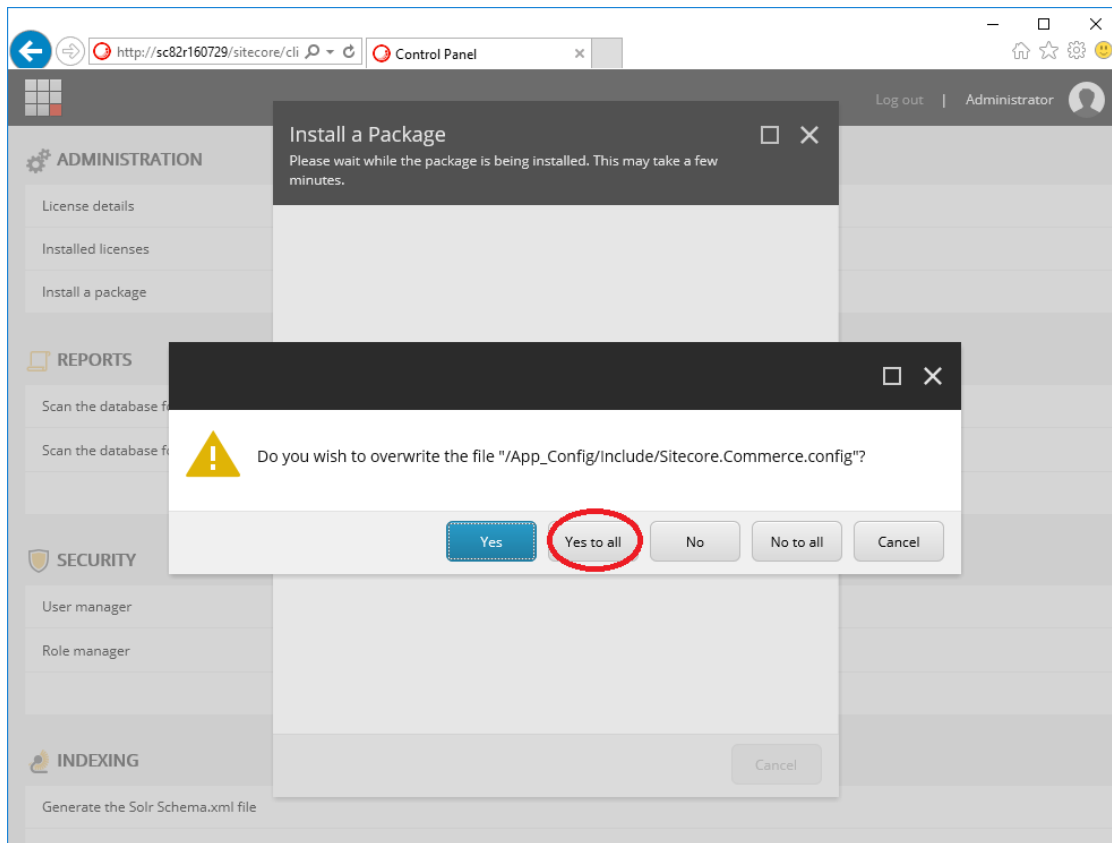


Tip: Can post-install be done later for SCpbCS?

7. Assuming everything looks good, proceed with installation.

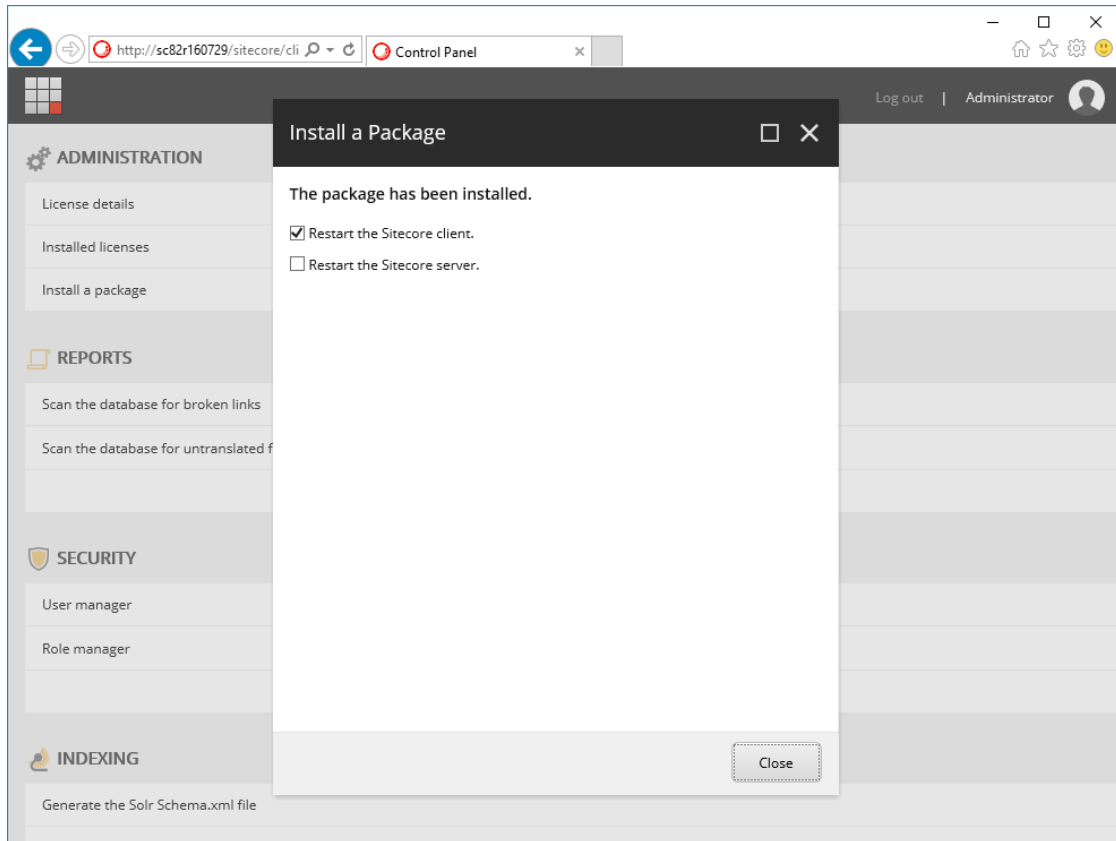


8. When prompted, you may select “Yes to All”.



Hint: These warnings are to confirm overwriting of `~/App_Config/Include/Sitecore.Commerce.config` and `~/bin/Sitecore.Commerce.dll` which ships with Sitecore. Feel free to click “Yes to All” because these are also included in this package.

9. When complete, restart the client.



Appendices

4.1 Software

This appendix lists links and references to the software and binaries used throughout this guide.

Commerce Server v11.4.148 [Installer](#)

Microsoft SQL Server v13.0.1601.5 (2016) [Installer](#)

MongoDB v2.8.0 signed [Installer](#)

Sitecore v8.2 rev. 160729 Initial Release [Installer Archive](#)

Sitecore Commerce Connect v8.2.273 [.zip](#)

Sitecore Commerce Server Connect v8.2.225 [.update](#)

Sitecore Instance Manager v1.4 rev. 160526 Update-3 [ClickOnce](#)

4.2 Terms and Concepts

This appendix provides contextual definitions of terms and concept sused throughout this guide.

CD Server Content Delivery server. A server that is public facing distributing finalized content that has been managed via the [CM Server](#).

CM Server Content Management Server. A server that is (usually) internally facing and responsible for creating and managing content that will be finalized and pushed to the [CD Server](#).

Commerce Connect An integration layer between a front-end web shop solution and a back-end e-commerce system.

Commerce Server Sitecore's product offering for managing and building an e-commerce solutions.

Config File A configuration file, typically ending in ".config" or ".config.disabled" located in Sitecore's ~/App_Config folder. These are used to modify the current Sitecore instance without directly modifying the main application's web.config.

SCpbCS Sitecore powered by Commerce Server. This is the combined Sitecore and Commerce Server solution.

SCpbMD Sitecore powered by Microsoft Dynamics AX. This is a combined Sitecore and Microsoft Dyanmics AX solution.

Sitecore License An XML file containing valid license information used by Sitecore to validate an installation.

See also:

GitHub GitHub repository with code samples and the source of this documentation.

GitHub Page GitHub Page used as a medium for writing about/discussion various topics more in-depth.

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