



LIVE WEBINAR



The Journey to Modern Responsive Online Help with MadCap Flare: A Case Study with cleverbridge

The logo for cleverbridge, featuring the word "cleverbridge" in a lowercase sans-serif font. The "c" is blue, the "l" is orange, and the "e" is blue. The "r" is orange, the "b" is blue, the "i" is orange, and the "d" is blue.

PRESENTED BY:

Jennifer Morse, Product Evangelist | MadCap Software, Inc

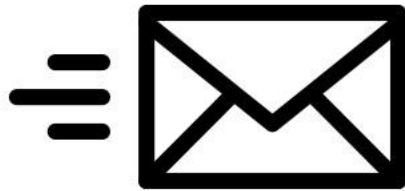
Andrew Smith, Technical Writer | cleverbridge

Juliane Knobloch, Technical Writer | cleverbridge

Peter Knauer, Frontend Developer | cleverbridge



BEFORE WE GET STARTED...



The webinar will be recorded
and emailed to all registrants



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throughout the webinar

About Us



Juliane Knobloch
(Technical Writer)



Peter Knauer
(Frontend Developer)

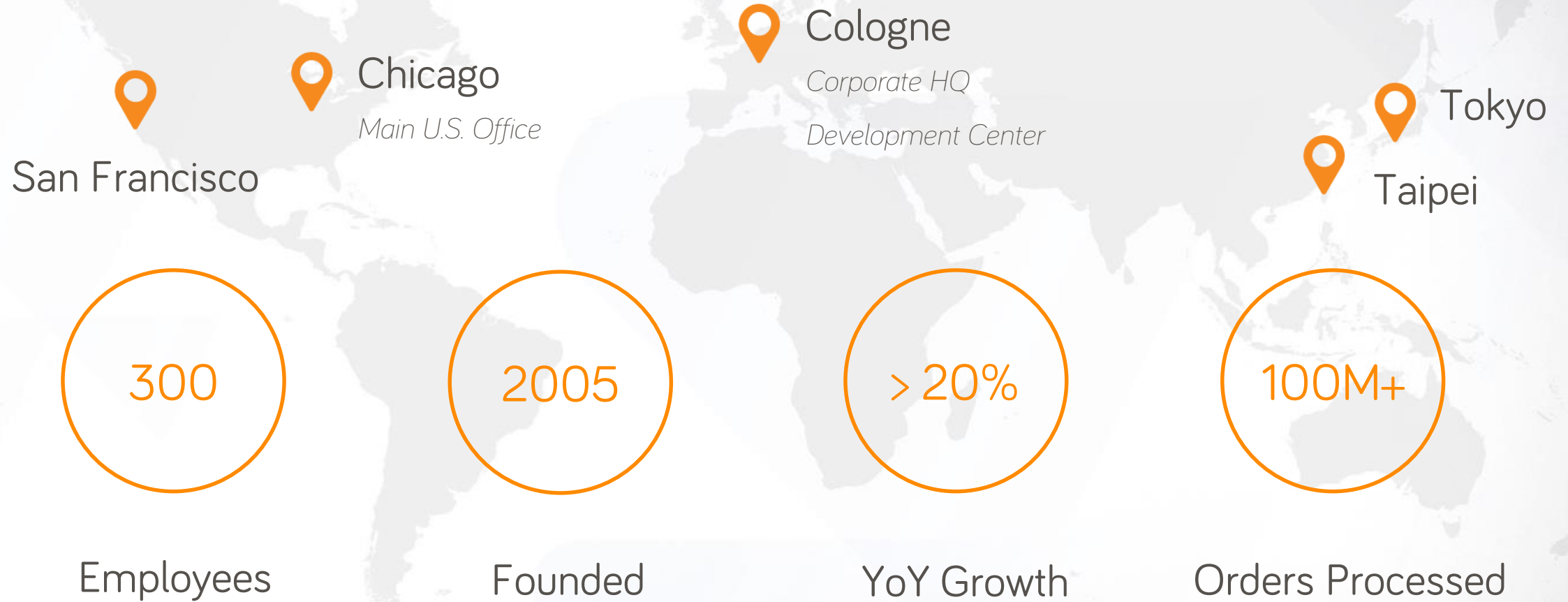


Andrew Smith
(Technical Writer)

About cleverbridge

cleverbridge provides all-in-one ecommerce and subscription management solutions for monetizing digital goods, online services and SaaS.

Offices and Numbers



Our Clients

SONY

SMARTBEAR

 **survio**

 LightWave

 **nitro**

 **AVIRA**

 **SCIEX**

nero

 **QUEST
SOFTWARE**

F-Secure 

BitTorrent

 **tenable**™

 **COREL**™

teradici
PCoIP

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ipswitch

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web control panel

Minitab 

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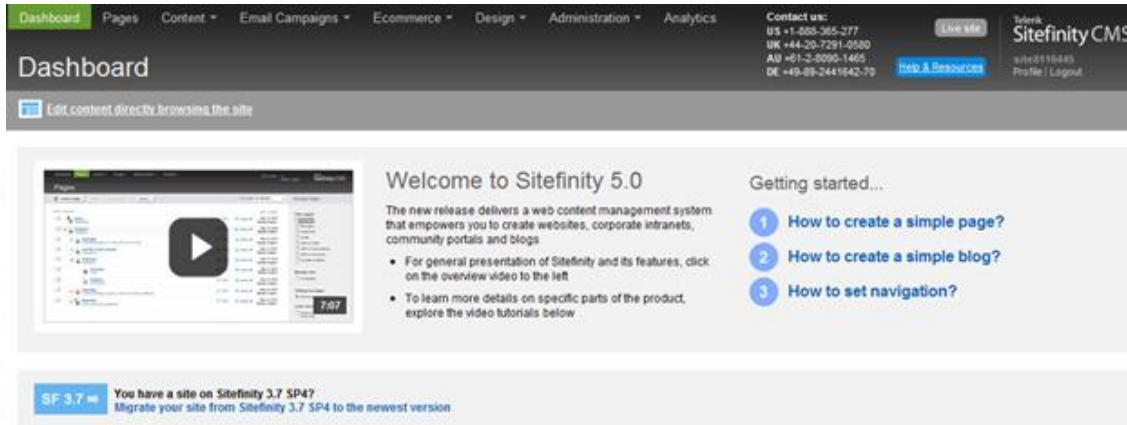
iMobie

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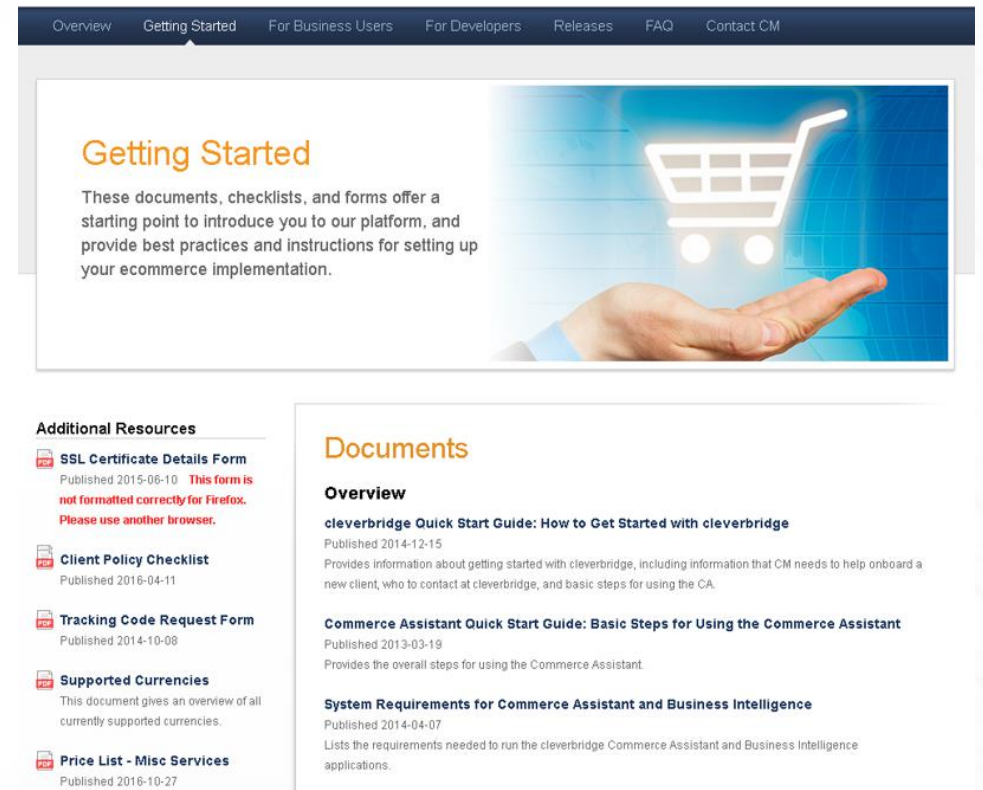
Documentation Before Flare

Web CMS




The screenshot shows the Sitefinity CMS Dashboard. At the top, there's a navigation bar with links like Dashboard, Pages, Content, Email Campaigns, Ecommerce, Design, Administration, and Analytics. Below this, the main content area is titled 'Dashboard' and includes a video player for 'Welcome to Sitefinity 5.0'. To the right of the video, there's a 'Getting started...' section with three numbered links: 'How to create a simple page?', 'How to create a simple blog?', and 'How to set navigation?'. At the bottom, there's a section for 'Video tutorials about...' with various categories like Mobile web, Forms, Fluent API, Template builder, Categories and tags, Web Analytics, Page setup with widgets, Show editing, Inline editing, and Page layouts.

Login protected web site with PDF's



The screenshot shows the 'Getting Started' page of the Sitefinity CMS. It features a large header image with a shopping cart icon and a hand holding it. Below the header, there's a section titled 'Getting Started' with a paragraph: 'These documents, checklists, and forms offer a starting point to introduce you to our platform, and provide best practices and instructions for setting up your ecommerce implementation.' To the right of this text is a large image of a hand holding a shopping cart. Below the main content, there's a section titled 'Additional Resources' with a list of PDF documents: 'SSL Certificate Details Form', 'Client Policy Checklist', 'Tracking Code Request Form', 'Supported Currencies', and 'Price List - Misc Services'. To the right of this list is a section titled 'Documents' with a sub-section 'Overview' containing two documents: 'cleverbridge Quick Start Guide: How to Get Started with cleverbridge' and 'Commerce Assistant Quick Start Guide: Basic Steps for Using the Commerce Assistant'. Below these, there's a section titled 'System Requirements for Commerce Assistant and Business Intelligence'.

Our Current Documentation Solution



Client Support

Getting StartedUsing the PlatformIntegrating Your SystemAdditional Resources


Show resources for:All Users▼What can we help you find?Log In →

Home > Getting Started

Getting Started

Step 1: Set Up Your Account
Step 2: Provide cleverbridge with Information
Step 3: Set Up Products
Step 4: Create Links
Step 5: Set Up Notifications
Step 6: Test the Cart
Step 7: Go Live
Step 8: View Customer Orders
Step 9: View Reports

Using the Platform
Integrating Your System
Additional Resources



In this section of this website, you can find information about getting started with cleverbridge, including how to set up your account, the information needed to start your on-boarding process, and the basic steps for using the Commerce Assistant, our all-in-one ecommerce tool.

⊕ Downloads *

Tip

Log in with your Commerce Assistant credentials and gain access to client-only content marked with an asterisk. This includes the latest version of the Commerce Assistant (CA) and Business Intelligence (BI), forms and lists, as well as the clearing & payouts guide.

Fast and Easy Publication

Changelog



All notable changes to the Client Support Center are documented on this page.

v1.0.12 - 2018-03-19

Added

- Added topic about [Single Sign-On \(SSO\)](#).
- Added links to the new [Cart API Reference](#) .
- Added [Release Notes Q4 2017 - Q1 2018](#).
- Added banner advertising new [API Reference](#) .

Changed

- Changed "APIs and Integration" navigation feature to [Integrating Your System](#).
- Reorganized drop-down topics formerly on "APIs & Integration". There are now two new topics: [Getting Started with Integration](#) & [Overview of APIs](#).

Removed

- Removed links to [rest.cleverbridge.com/cart](#).
- Removed Cart API content duplicated on [developer.cleverbridge.com](#).
- Removed information about the limitations of [Product & Pricing API](#).

Fixed

- Updated the path of the Roboto font.
- Fixed problem when printing "Standalone" topics.
- Repaired link to [Configure a License Key Generator in the Commerce Assistant](#).

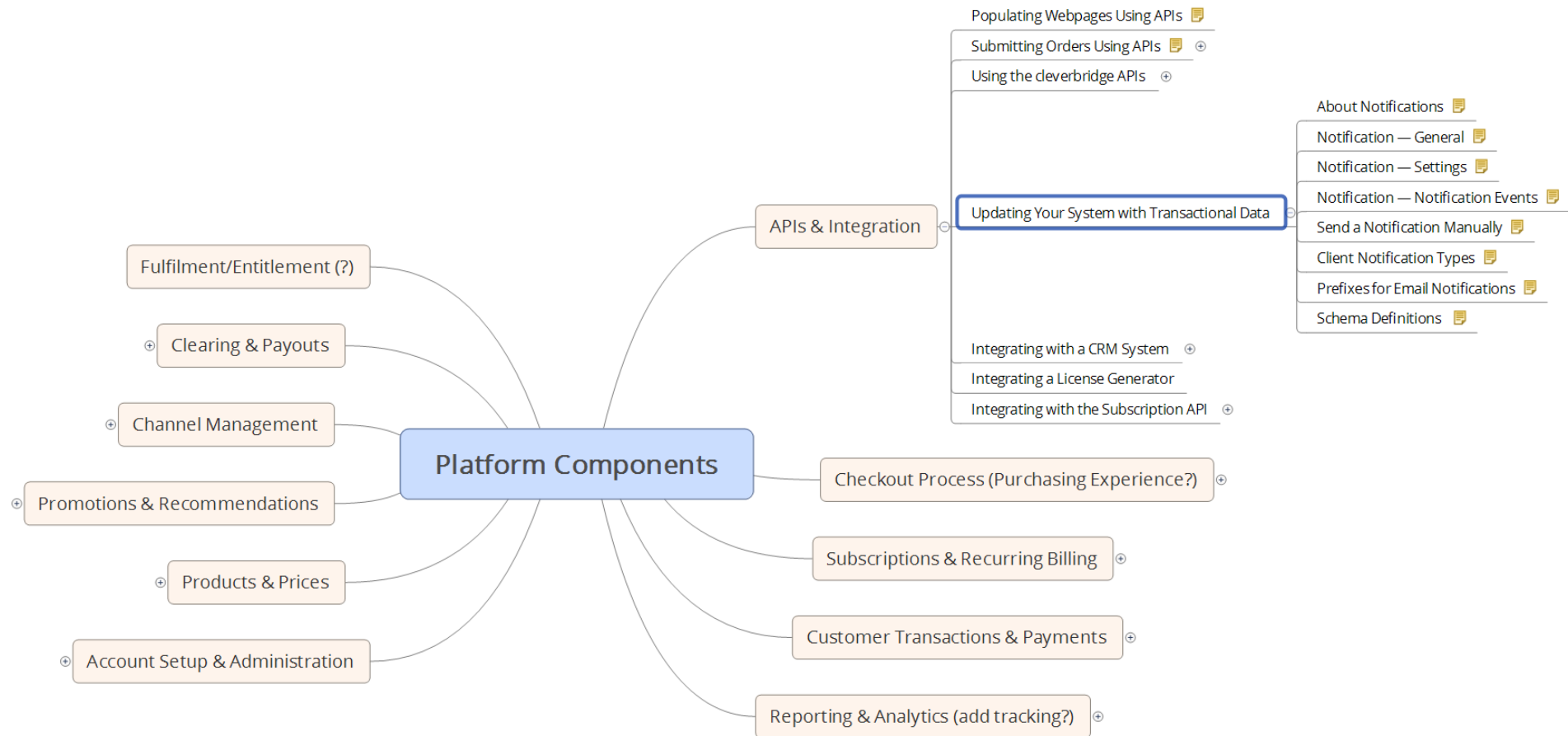
⊕ v1.0.11 - 2018-03-06

⊕ v1.0.10 - 2018-02-20

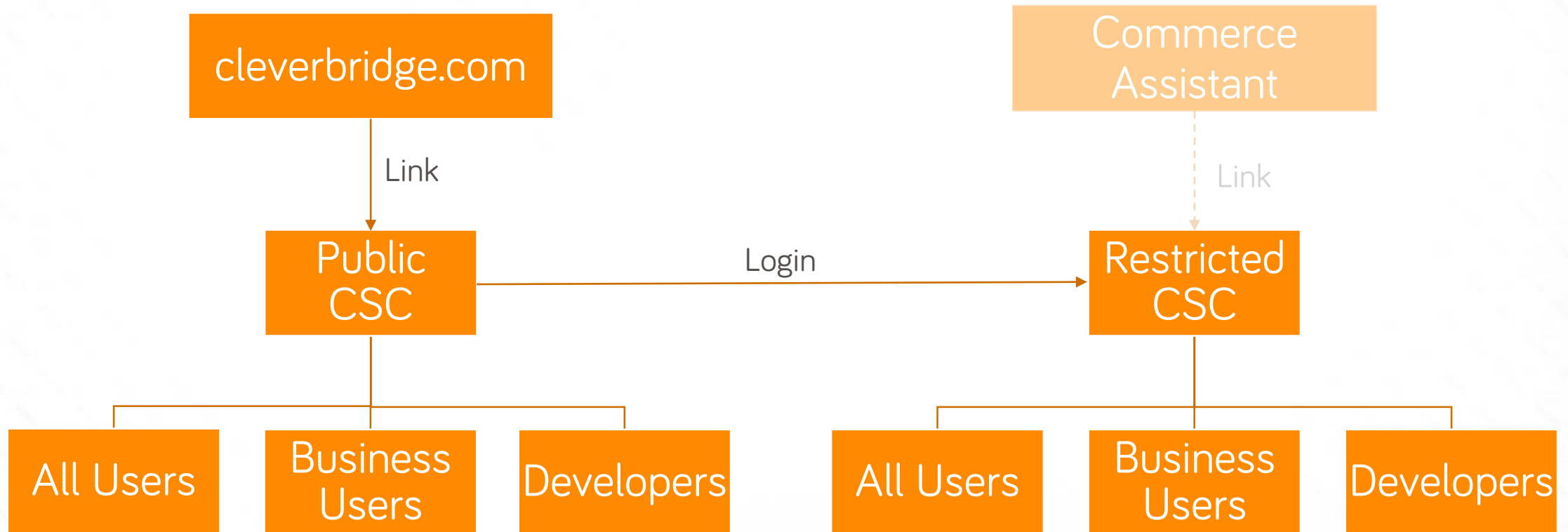
⊕ v1.0.9 - 2018-02-07

⊕ v1.0.8 - 2018-01-23

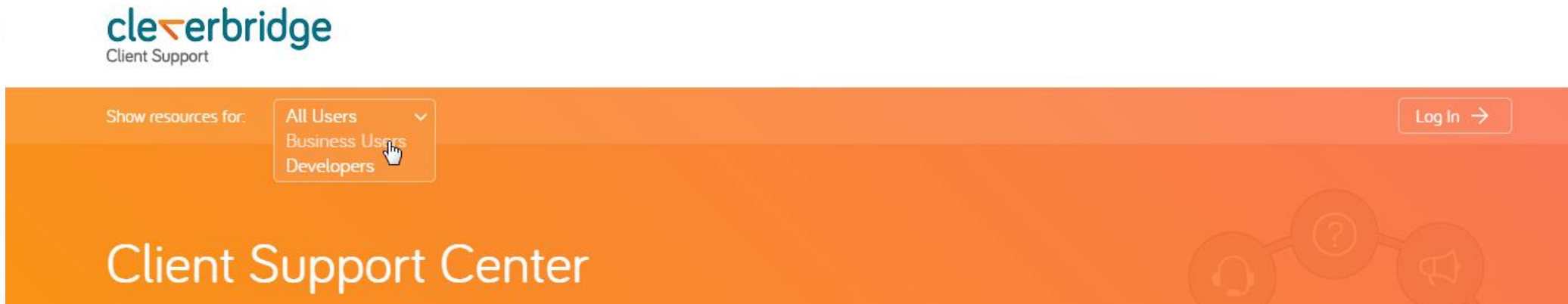
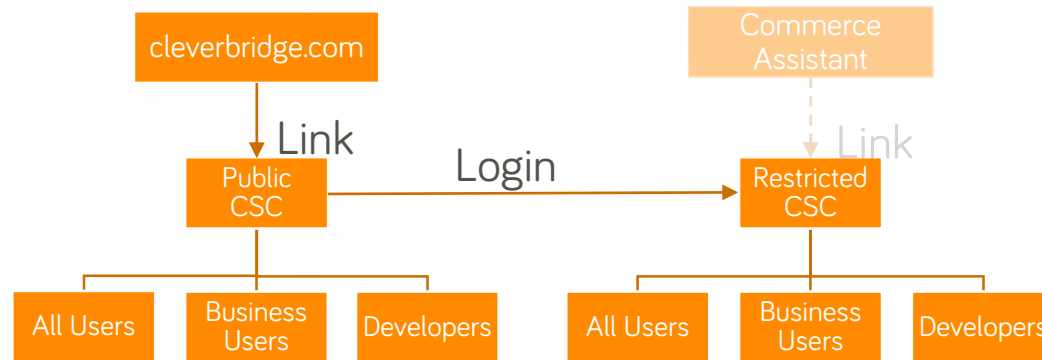
Best Practices: Information Architecture with Mind Mapping Tool



Best Practices: Audience-Specific Outputs



Best Practices: Navigation between Audience-Specific Outputs



Best Practices: Four Navigation Levels and Many Dropdowns

Checkout Process Guide

Creating the Best URL for Your Business

Create a Destination URL (URL)

Create a Display URL (PURL)

Create a Protected URL (UURL)

Create a Session URL (SURL)

Create a Dynamic Protected URL (Dynamic UURL)

Quick Facts about URLs

Controlling and Configuring Your Cart Using URL Parameters

Setting Up Your Checkout Pages

Branding Your Checkout Process

Allowing Purchases and Upgrades Inside Your Software

Improving the Conversion Rate

Localizing the Cart

Optimizing the Cart through A/B Testing

Using the cleverbridge Product Catalog instead of Your Product Pages

Offering Global Payment Methods and Currencies

Home > Using the Platform > Checkout Process Guide > Creating the Best URL for Your Business

Creating the Best URL for Your Business

Using the cleverbridge platform, it is possible to create the following URL types:

Destination URL (URL)

Facts

In the cleverbridge platform, destination URLs are checkout page links in which all parameters are visible and unprotected. Destination URLs are generic and, therefore, can be used by any user.

Example

`https://www.cleverbridge.com/864/?scope=checkout&cart=97771&coupon=x21zy8&languages=fr`

Advantages

- Can be easily built and deconstructed in the Commerce Assistant.
- Can be manually built.

Disadvantages

- Are not protected, and all parameters can be seen and altered by the customer.

Display URL (PURL)

Protected URL (UURL)

Session URL (SURL)

Dynamic Protected URL (Dynamic UURL)

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Best Practices: Make Design Mockups

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Getting Started

User Guides

Commerce Assistant

Business Intelligence

Test

Show information for:

All

Business Users

Developers

Commerce Assistant

Log in

Commerce Assistant > Using the Dashboard

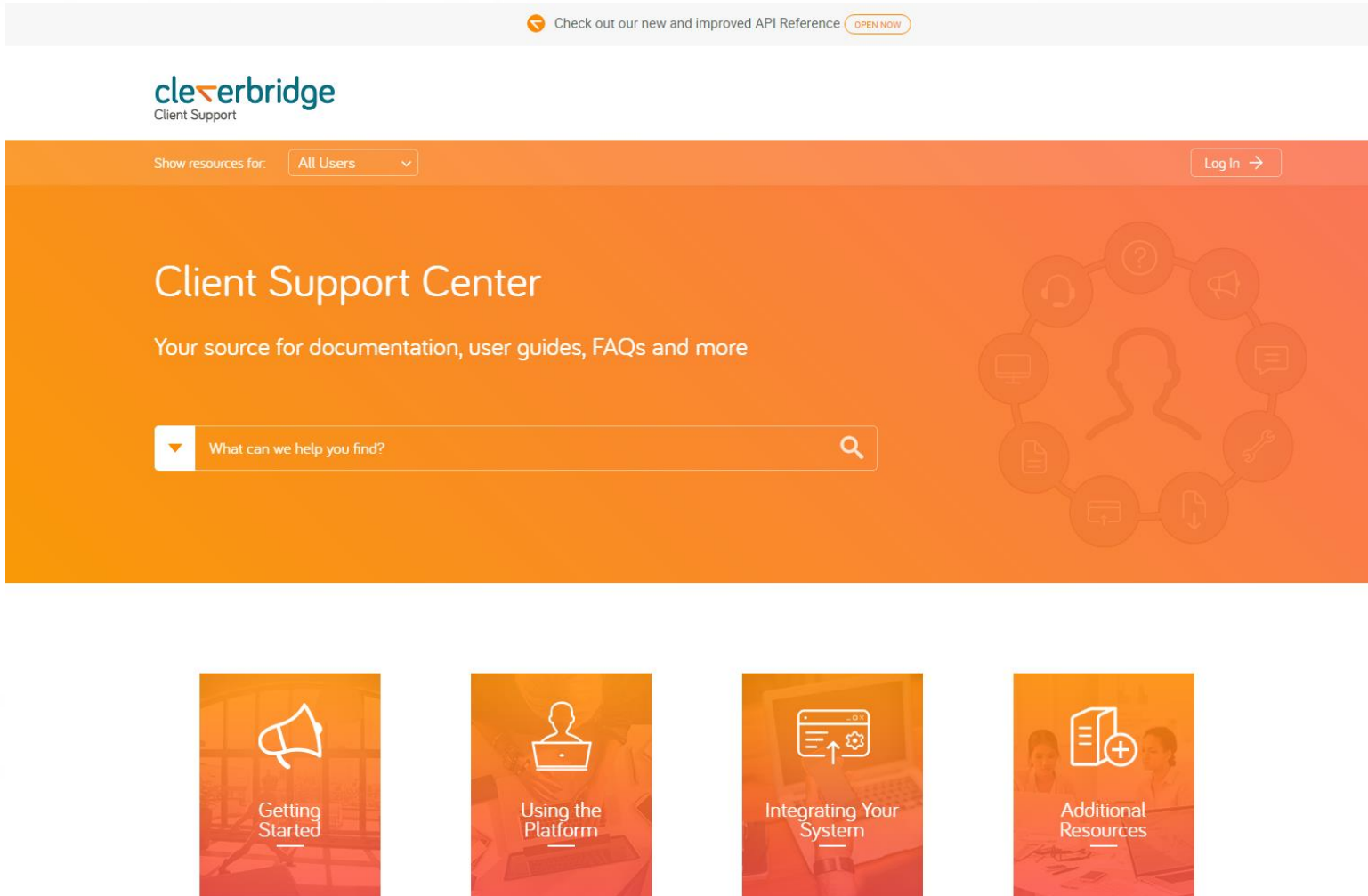
Dashboard Metric Definitions

The dashboard reporting metrics are based on the following definitions:

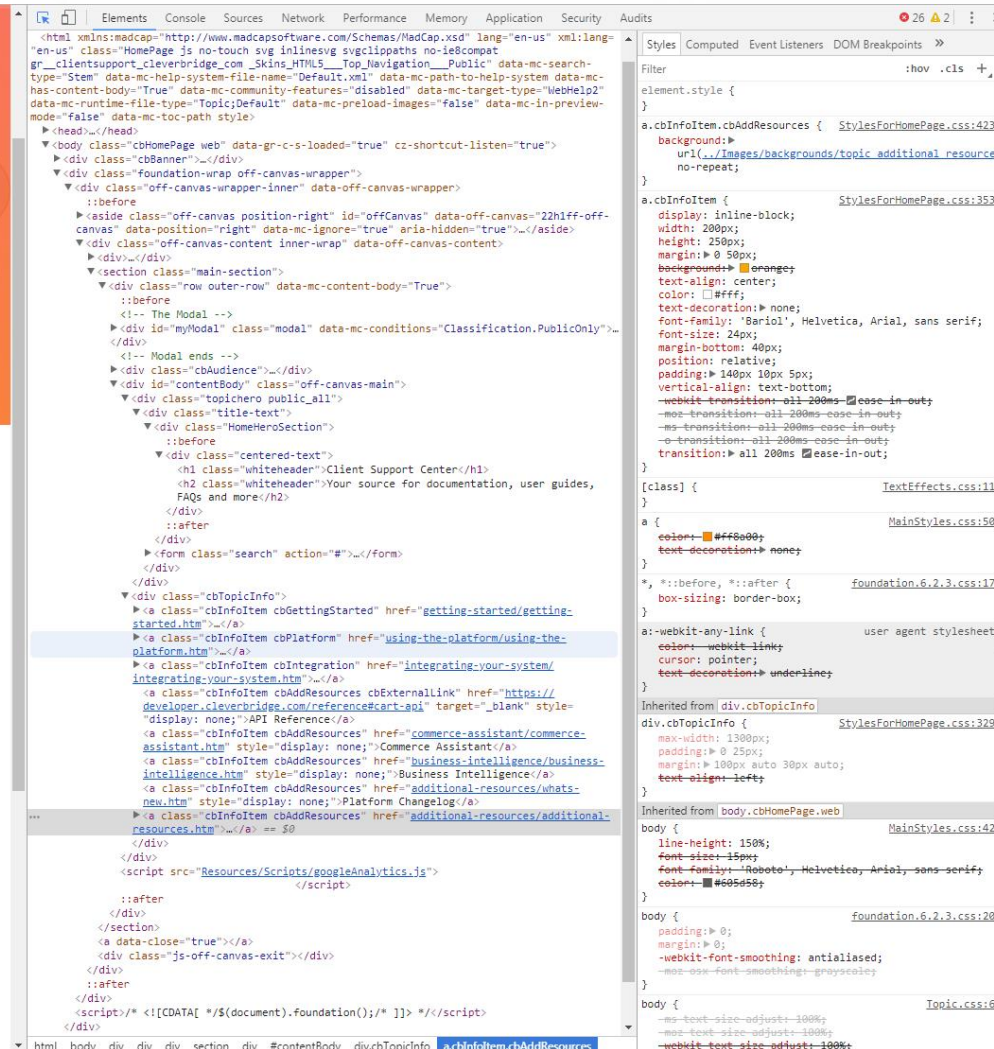
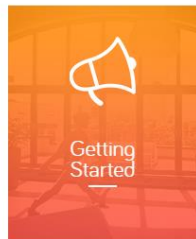
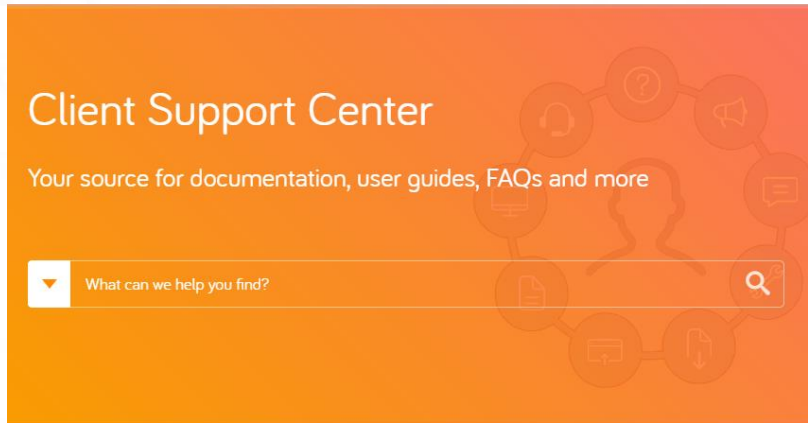
Metric	Definition
Currency	Based on your account's default base currency. If the currency is converted, it's based on the daily exchange rate, updated daily at midnight UTC (Universal Time Coordinated).
Conversion Rate	<div>Number of paid orders divided by the</div> <div>This number can be potentially skewed as a result of including subscription renewals, which are not processed with a unique session.</div>
Last 24 Hours	<div>Previous 24 hours, base on the last whole hour (this may not be exact).</div> <div>The current time is 2:45 PM on July 20. The metrics display data from 2:00 PM on July 19 to 2:00 PM on July 20.</div> <div>The list order for the top five metric widgets, such as Top Five Product Metrics, is based on the last 24 hours and is sorted from highest to lowest.</div>
Last 14 Days	Previous 14 complete days, with a complete day based on midnight UTC.

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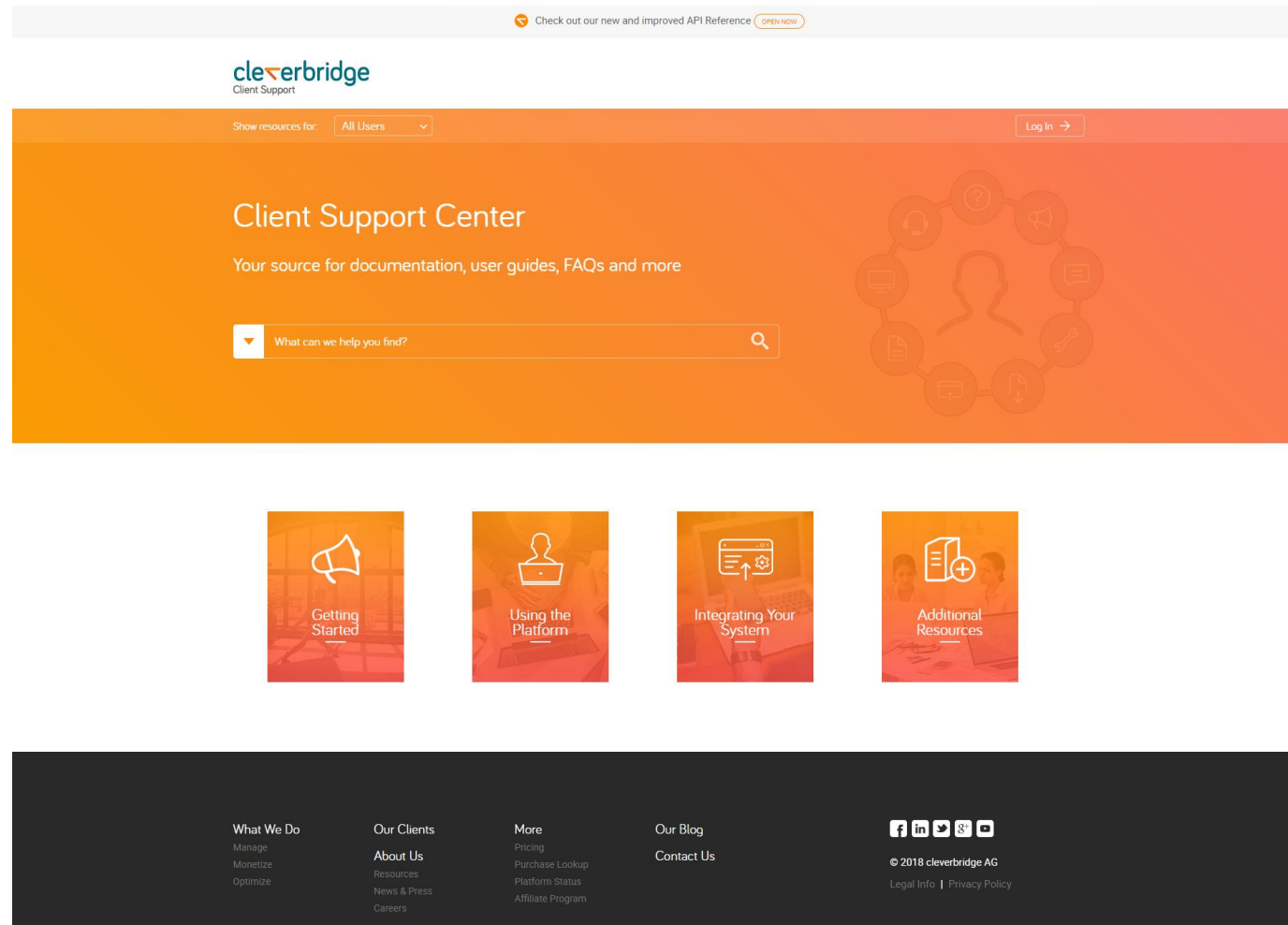
Best Practices: Customization with JavaScript



Best Practices: Preview CSS Changes in Browser



Best Practices: User Testing



Best Practices: Search Tips

Show resources for: All Users

api

Log Out

Search Tips

Use a different search method

The Client Support Center supports the following search methods:

Full Text Search

You can search for a complete word or number string.

Note

The full text search is not case-sensitive. For example, a search for the word "run" will find matches for "Run" and "run." The full text search also matches with variant endings. For example, a search for the word "run" will also find matches for words such as, "runner," "running," and "runs."

- Phrase Search
- Boolean Operators
- Filter your search results
- Make sure all words are spelled correctly

Your search for "api" returned 125 result(s).

Overview of APIs

Here you can find information about the authentication, header values, and status codes used for our APIs. Testing information and reference materials are also provided. Important All API requests must be made over HTTPS. Calls made over plain HTTP will fail. Authentication You authenticate to the ...

[integrating-your-system/overview-of-apis.htm](#)

Integrate with the Product & Pricing API

Important To integrate the Product & Pricing API into your front-end, you need the cleverAPI Script and the Sample CSS . 1. Load the cleverAPI Script and Sample CSS To load the script and CSS, enter the following into the HEAD of the HTML page: <link rel="stylesheet" ...

[integrating-your-system/integrate-with-the-product-and-pricing-api.htm](#)

Best Practices: Source Control with Git

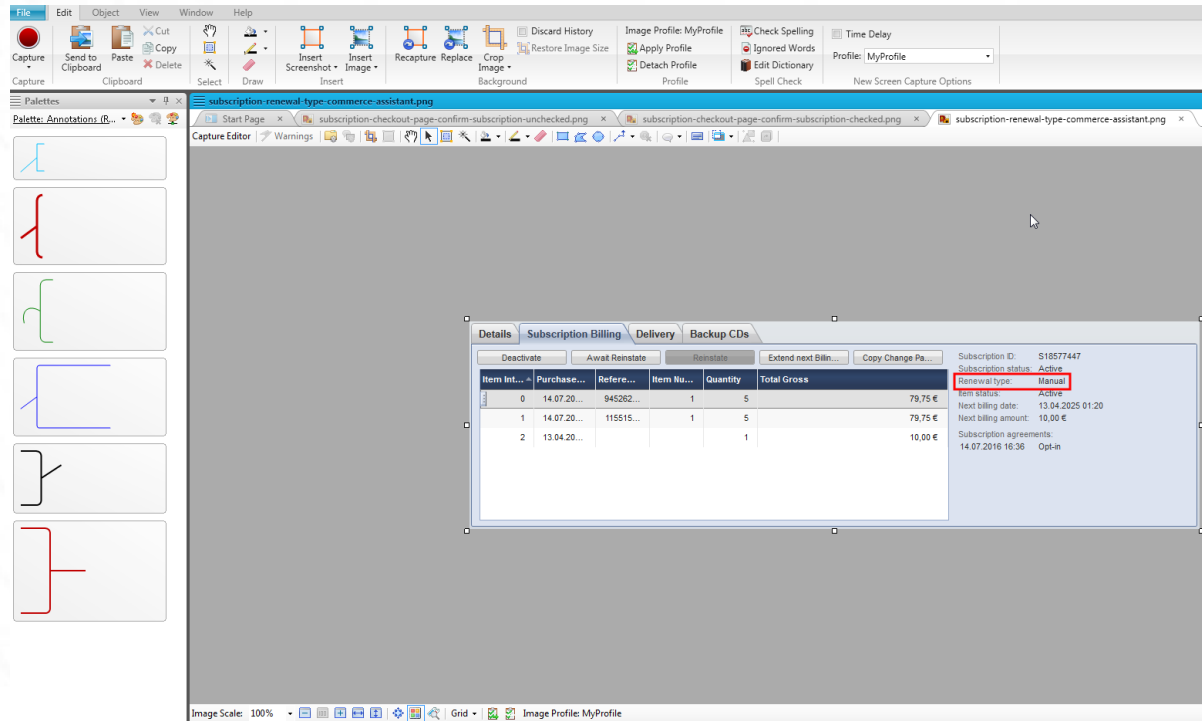
help-center (development) - Git Extensions

Start Repository Navigate View Commands Github Plugins Tools Help

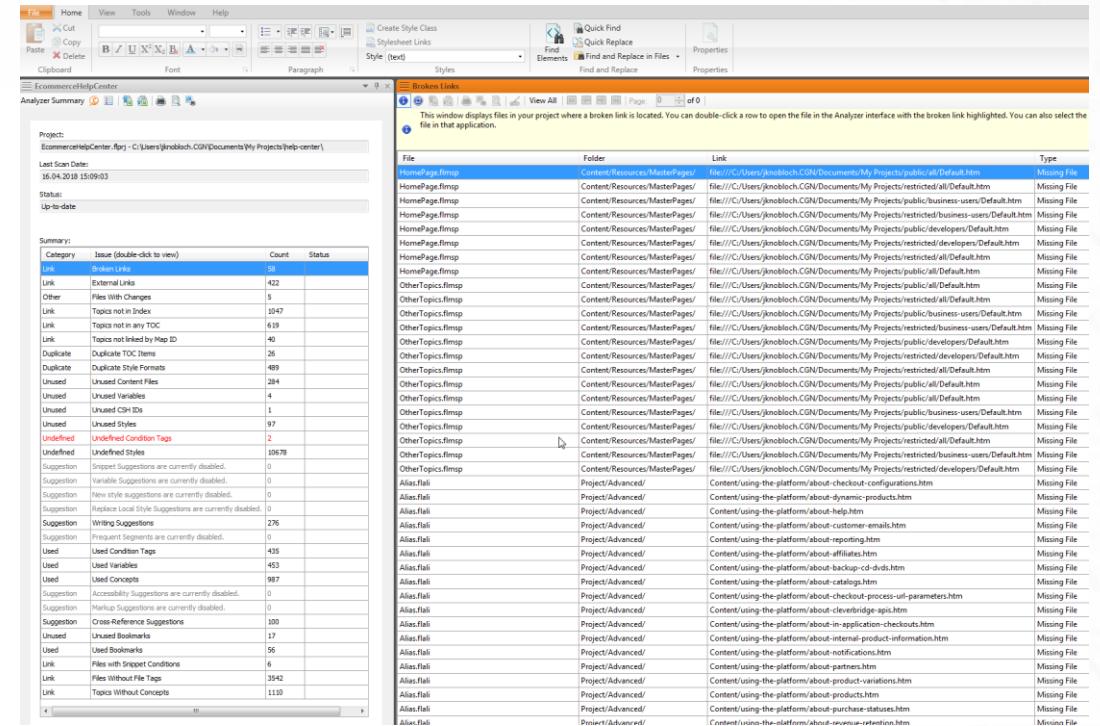
Commit (1) | Filter:

Commit Message	Author	Time
development origin/development TW-817 incorporated feedback from Celia	Juliane Knobloch	2 hours ago
Merge branch 'development' of git.cgn.cleverbridge.com:technicalwriting/ecommerce/help-center into development	Andrew Smith	2 hours ago
corrections before publication	Andrew Smith	2 hours ago
TW-817 text change	Juliane Knobloch	21 hours ago
TW-817 updated link to XML schema for notifications and added warning	Juliane Knobloch	21 hours ago
Merge branch 'development' of git.cgn.cleverbridge.com:technicalwriting/ecommerce/help-center into development	Juliane Knobloch	1 day ago
CORE-4522 added note on ExtraParameterMode	Juliane Knobloch	1 day ago
added test connection api, added links to api ref on create-a-my-account, updated "update subscription renewal type" info on subscription api page	Andrew Smith	1 day ago
tw-776-parameter-info-about-partners origin/tw-776-parameter-info-about-partners incorporated Martin's feedback	Juliane Knobloch	1 day ago
Added Subscription Renewal Type Changed Notification - Part 2	Andrew Smith	3 days ago
Added Subscription Renewal Type Changed Notification	Andrew Smith	3 days ago
new topic "Create a Questionnaire for Partners"	Juliane Knobloch	4 days ago
deleted repetitive info about bundles	Andrew Smith	4 days ago
corrected spelling of ecommerce	Andrew Smith	4 days ago
enhanced existing topic in xa- and xp-parameters	Juliane Knobloch	4 days ago
changes to product-and-pricing-api docs	Andrew Smith	5 days ago
TW-814 corrected name of notification type, fixed issues with standalone topic	Juliane Knobloch	5 days ago
peer review TW-812	Juliane Knobloch	6 days ago
updated product and pricing api docs - part 6	Andrew Smith	6 days ago
Core-4345 Test API Connection	Andrew Smith	6 days ago
updated product and pricing api docs - part 5	Andrew Smith	6 days ago
updated product and pricing api docs - part 4	Andrew Smith	6 days ago
updated product and pricing api docs - part 3	Andrew Smith	6 days ago
Merge branch 'development' of git.cgn.cleverbridge.com:technicalwriting/ecommerce/help-center into development	Andrew Smith	6 days ago

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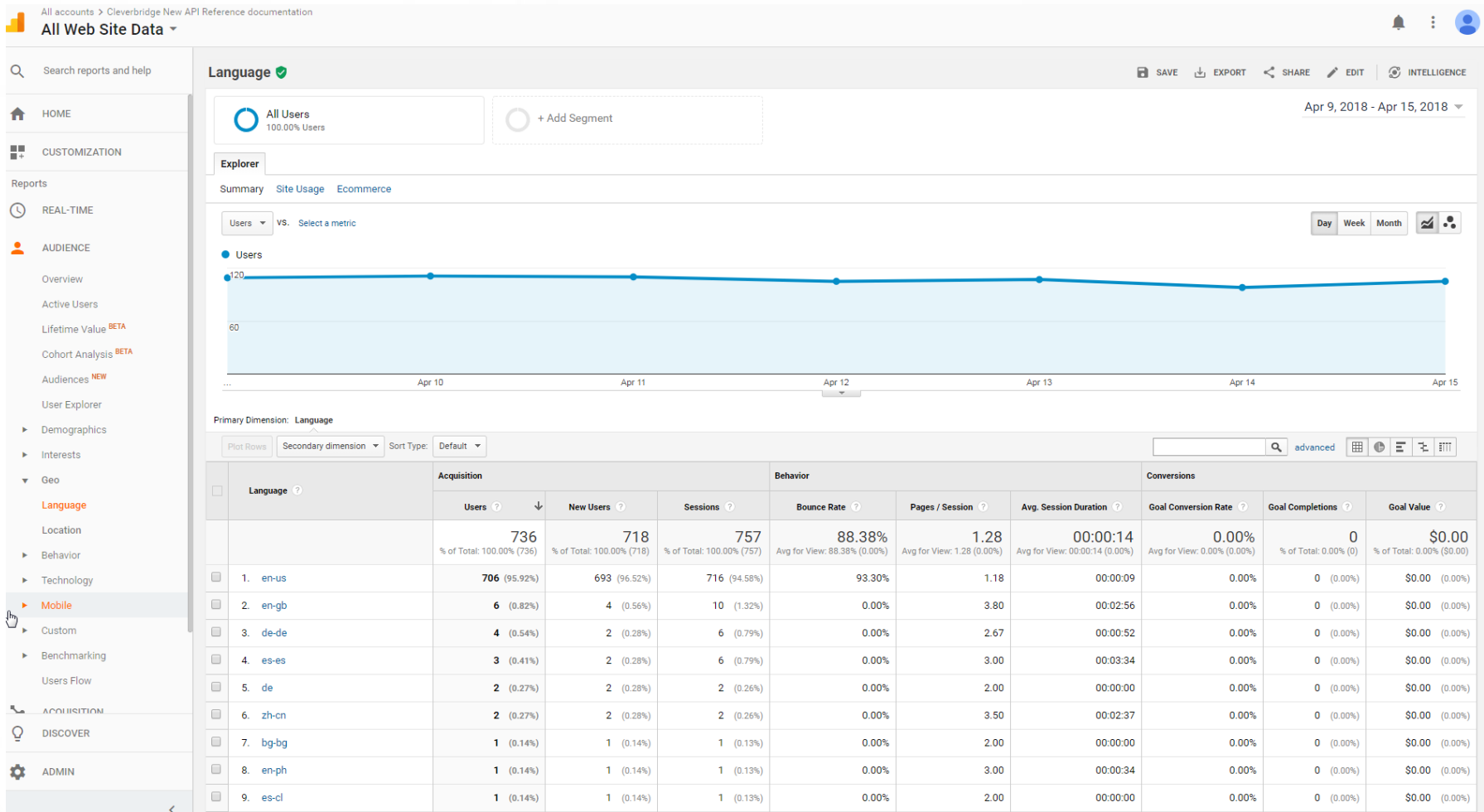


Capture



Analyzer

Continual Improvements



Next Steps: Replace Help Viewer in Windows Application

The screenshot shows the Shieldware Commerce Assistant application window. The title bar reads "SHIELDWARE Shieldware (Example) (864) - Commerce Assistant". The menu bar includes View, Products & Delivery, Marketing, Configurations, Tools, Channel Management, Transactions, Reporting, Setup, and Help. The Help menu is highlighted with a red box. Below the menu bar, a sidebar on the left contains a search bar and a tree view of the application's structure, including Open Worksheets, Dashboards, Products & Delivery, Marketing, Promotions, Configurations, Tools, Channel Management, Transactions, Reporting, Setup, and Open Windows. The main content area displays the Cleverbridge Client Support website. The website has a header with the Cleverbridge logo and navigation links: Getting Started, Using the Platform, APIs & Integration, Commerce Assistant, Business Intelligence, and Additional Resources. Below the header is a search bar and a "Log In" button. The main content area is titled "Commerce Assistant" and includes a welcome message: "Welcome to the Commerce Assistant. Here's what you'll find in the help:". Below this is a table with two columns: Folder and Description.

Folder	Description
Getting Started	First steps for getting started with the Commerce Assistant.
Basic Steps for Using the Commerce Assistant	Overall workflow for using the Commerce Assistant.
Commerce Assistant Features	Provides instructions for how to use each feature.
Checkout Configuration	Overview of the cleverbridge checkout process.
cleverbridge URLs	Describes the cleverbridge URL structure and lists possible parameters that can be added to a URL.
Subscription Billing	Information about setting up and viewing subscriptions.
Best Practices	Strategies for using the Commerce Assistant to meet your e-commerce goals.
Video Tutorials	All of the video tutorials.

Next Steps: Replace Dynamic Help in Windows Application

The screenshot displays the Shieldware Commerce Assistant application. The main window shows a list of products with columns for Product ID, Product Name, Product Type, and Unit Price. The sidebar on the right contains a 'Search for a Product' section with instructions on how to use the search feature, including filtering and organizing results. The sidebar also includes links to 'Open a Search', 'Filter Search Results', 'Organize Search Results', 'Open and Export Data', 'Copy Content from the List', 'Save a Default View', 'Copy a Product', and 'Delete a Product'.

Product ID	Product Name	Product Type	Unit Price
97769	Internet Security	Base Product	
97770	Internet Security Basic For your home, our most basic security	Product	0,00 \$
97771	Internet Security Basic Extended For your home	Product	5,99 \$
97772	Internet Security Professional For your small business or home office	Product	79,95 \$
97773	Internet Security Enterprise For medium-to-large sized businesses	Product	99,95 \$
97774	Mobile Internet Security For your mobile device	Product	9,95 \$
97775	Computer Optimization	Product	9,95 \$
97776	Shredder Removes online and offline computer activity records	Product	0,00 \$
97777	Backup CD/DVD	Backup CD	9,95 \$
97778	Extended Download	Additional Se...	4,95 \$
97779	Technical Support - Silver Level	Additional Se...	9,95 \$
97780	Internet Security Bundle - Basic Extended plus Mobile	Bundle	59,95 \$
97781	Internet Security Bundle - Basic Extended plus Computer Optimization and Shredder	Bundle	49,95 \$
97782	Internet Security Basic Extended - Boxed Product NEN	Product	39,95 \$
97783	Internet Security Professional - Boxed Product	Product	89,95 \$
97784	Internet Security Enterprise - Boxed Product	Product	109,95 \$
97785	Upgrade from Professional to Enterprise	Product	15,95 \$
97786	Upgrade to Internet Security Basic Extended 2.0 Upgrade to our latest version	Product	19,95 \$
98062	Technical Support - Gold Level	Product	0,00 \$
102687	Backup Software	Product	7,95 \$
142182	TicTacToe Software will be activated post purchase	Product	12,95 \$
194988	Andrew's Product	Product	10,00 \$
200859	test - german	Product	12,00 \$

Search for a Product

The products search feature is used to find information about products by returning a list of results containing the products you would like to access.

You can refine the search results by using filters and organize the results by using columns. Details and items related to a specific product can be viewed in the contextual panels. Search results can also be exported in the format of your choice to make the results available outside the Commerce Assistant.

Open a Search

In the main menu, select **Products & Delivery > Products**. The **Products** search opens.

Filter Search Results

To filter search results, see [Filter Search Results](#).

Organize Search Results

To organize search results, see [Filter Search Results Using Grouping Filters](#).

Open and Export Data

To open and export the search results, see [Export Data](#).

Copy Content from the List

To copy content from the search list, see [Copy Content from a List](#).

Save a Default View

To save a default view of a search, see [Save a Default View of a Search](#).

Copy a Product

To make a copy of a product, right-click the product in the search results and select **Create Copy**. The product opens. Give the copy a unique name. Click **Save**.

Delete a Product



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