

infigo





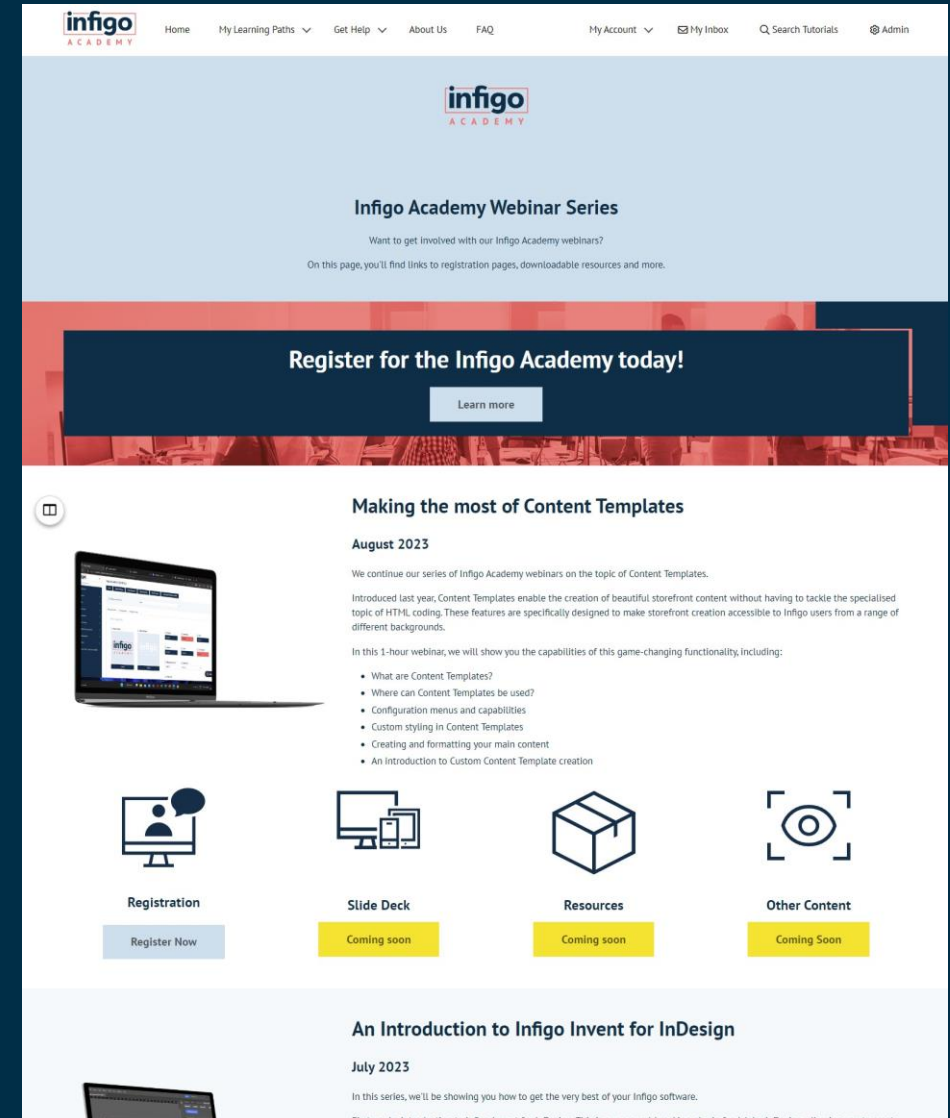
Introduction



Resources are available for viewing / download from the Infigo Academy from the following link:

<https://training.infigosoftware.com/academy/t/WebinarResources>

This link will also be placed in the chat.



The screenshot shows the Infigo Academy website interface. At the top, there is a navigation bar with the Infigo Academy logo and links for Home, My Learning Paths, Get Help, About Us, FAQ, My Account, My Inbox, Search Tutorials, and Admin. Below the navigation bar, the main heading reads "Infigo Academy Webinar Series" with a sub-heading "Want to get involved with our Infigo Academy webinars?" and a note "On this page, you'll find links to registration pages, downloadable resources and more." A prominent red banner with white text says "Register for the Infigo Academy today!" with a "Learn more" button. The main content area features a section titled "Making the most of Content Templates" for August 2023. It includes a laptop image showing a website design and a list of topics: "What are Content Templates?", "Where can Content Templates be used?", "Configuration menus and capabilities", "Custom styling in Content Templates", "Creating and formatting your main content", and "An Introduction to Custom Content Template creation". Below this, there are four icons representing different resources: "Registration" (with a "Register Now" button), "Slide Deck" (with a "Coming soon" button), "Resources" (with a "Coming soon" button), and "Other Content" (with a "Coming Soon" button). The bottom section is titled "An Introduction to Infigo Invent for InDesign" for July 2023, with a note "In this series, we'll be showing you how to get the very best of your Infigo software." and a partially visible sub-heading "First up An Introduction to Infigo Invent for InDesign. This is our ground-breaking plugin for Adobe InDesign, allowing you to create".

- The current responsible team member for queries on Access Permissions is **James Thompson**.
- James joined Infigo in August 2022 and has taken to his support role like a duck to water. James was the recipient of the coveted Rising Star award at our 2023 company event, in recognition of his skill and efforts.
- Send any UI related queries via the usual Zendesk channels.



Control access to Products, based on the Customer accessing the Storefront.

Numerous methods of defining both Customer and Product are available, including:

- Individual Product
- Individual Customer
- Categories
- Departments
- Customer roles
- Customer location
- Etc

Potential use cases:

- B2B Storefronts where multiple companies have access to the one site. Customers are only able to access Products associated with them.
- B2B Storefronts where Customers in different locations, different roles, etc, need access to only certain Products.



See below a summary of terminology used throughout this presentation.

Customer	A user registered to an Infigo Storefront
Product	An item available for ordering on a Storefront
Scope	A Customer or set of Customers to be considered in Access Permissions
Target	A Product or set of Products to be considered in Access Permissions
Rule	A combination of a Scope and Target
Connection	Not a term you will see within the Infigo software. This is a term used by the Infigo Academy to explain a link between Customer and Product formed when creating one or more Rules.
Access	Determining whether a rule grants or denies the ability for a Customer to engage with a Product.

See below a summary of terminology used throughout this presentation.

Weighting

A numerical importance given to a Rule. The higher the number, the more important the Rule.

Rule Group

A collection of Rules to be evaluated together, in isolation of other Rules / Rule Groups.

Department

A grouped collection of Customers

Category

A grouped collection of Products

Default Access

A global setting granting or denying access to ALL Products when using Access Permissions

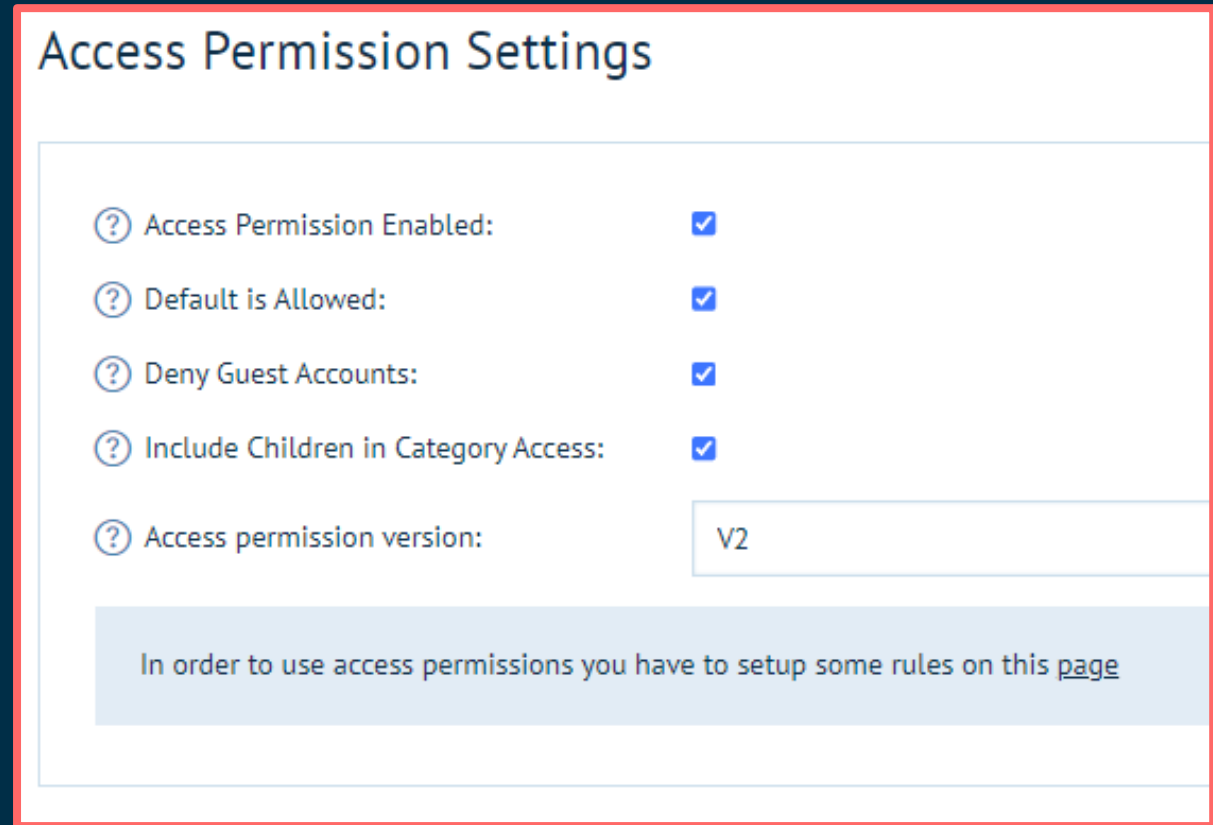
Access Permission Enabled | General on/off switch for the use of Access Permissions

Default is Allowed | Sets whether the default condition is **GRANTED** or **DENIED** access to all Products.

Deny Guest Accounts | Restricts the ability for Guest accounts, which would generally defeat the purpose Access Permissions

Include Children in Category Access | When assessing access to a Category, choose whether to include child categories and products. (Always active for V2)

Access permission version: V2 provides massively improved functionality. Should be utilised by ALL unless V1 is already in heavy use on your Storefront.



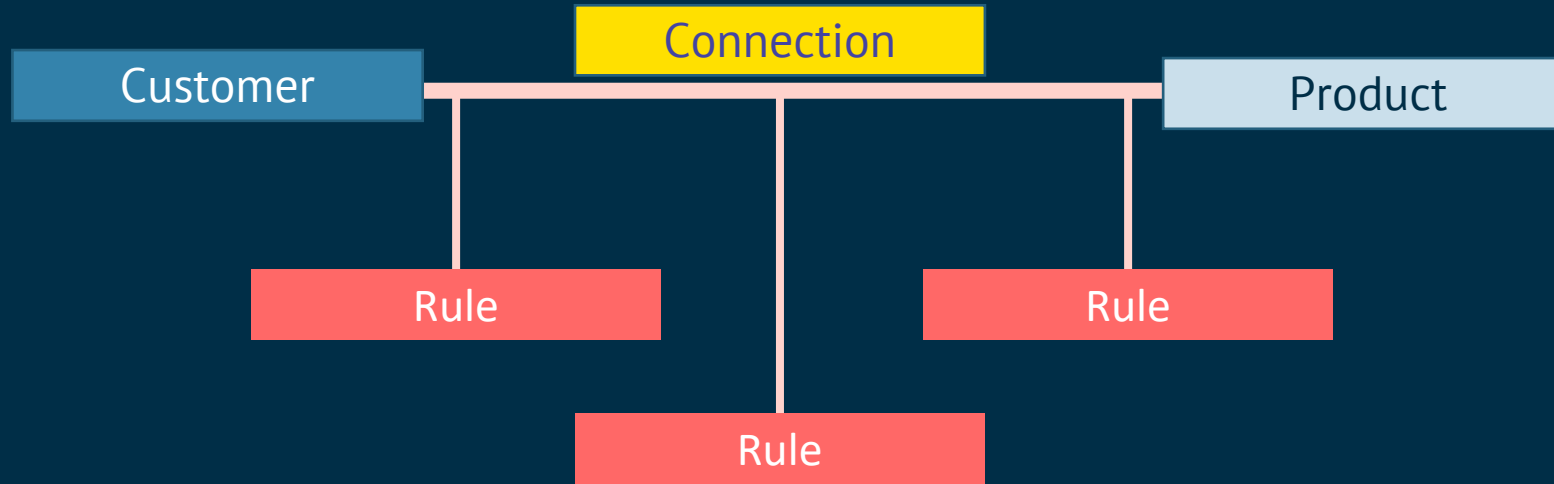
The screenshot shows the 'Access Permission Settings' page. It features five settings, each with a help icon (question mark in a circle) and a checkbox or input field. The first four settings are checked, and the fifth is set to 'V2'. A light blue banner at the bottom contains a note about setting up rules.

Setting	Value
Access Permission Enabled:	<input checked="" type="checkbox"/>
Default is Allowed:	<input checked="" type="checkbox"/>
Deny Guest Accounts:	<input checked="" type="checkbox"/>
Include Children in Category Access:	<input checked="" type="checkbox"/>
Access permission version:	V2

In order to use access permissions you have to setup some rules on this [page](#)



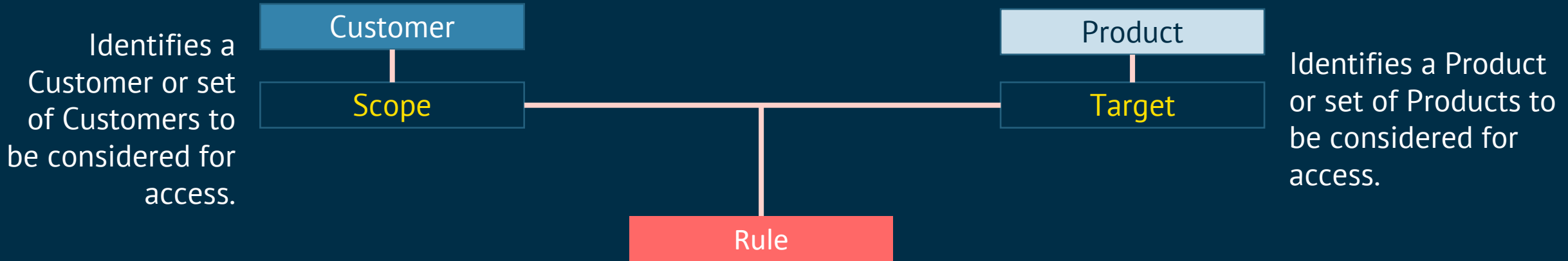
Rules Engine Overview



Every **Customer** and **Product** combination will initially have **default** access specified via the Access Permissions settings. Either global granting or denying of access to **Products**.

The Access Permissions functionality creates **Rules**, which establishes **connections** between **Products** and **Customers**, along with determining how the **connections** act.

Consider that each **Customer** and **Product** combination can only have one **connection**, however these **connections** can be addressed in multiple **rules**.



A **Rule** is a **connection** between Product and Customer, which **grants or denies access** between them.

Rules are formed using **Scopes** and **Targets**. These allow for the specification of more than one Customer or Product with a single **Rule**.

For example, a **Scope** may relate to a single Customer, or an entire Department.

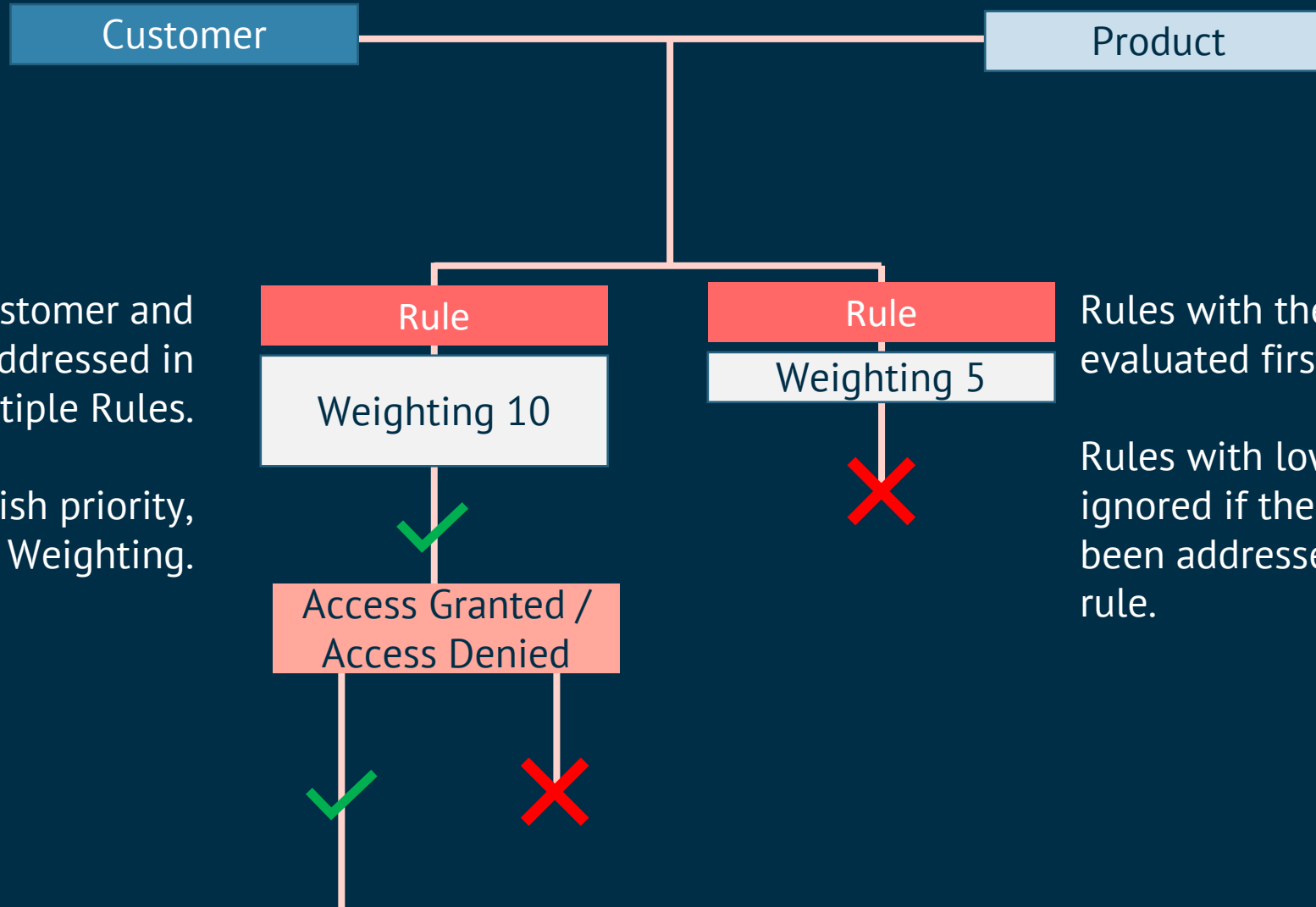


When a Customer accesses a Storefront, each Rule is evaluated to see if it relates to the Customer and Product in question.

A rule that passes evaluation then either grants or denies access to that connection.

Access Granted /
Access Denied



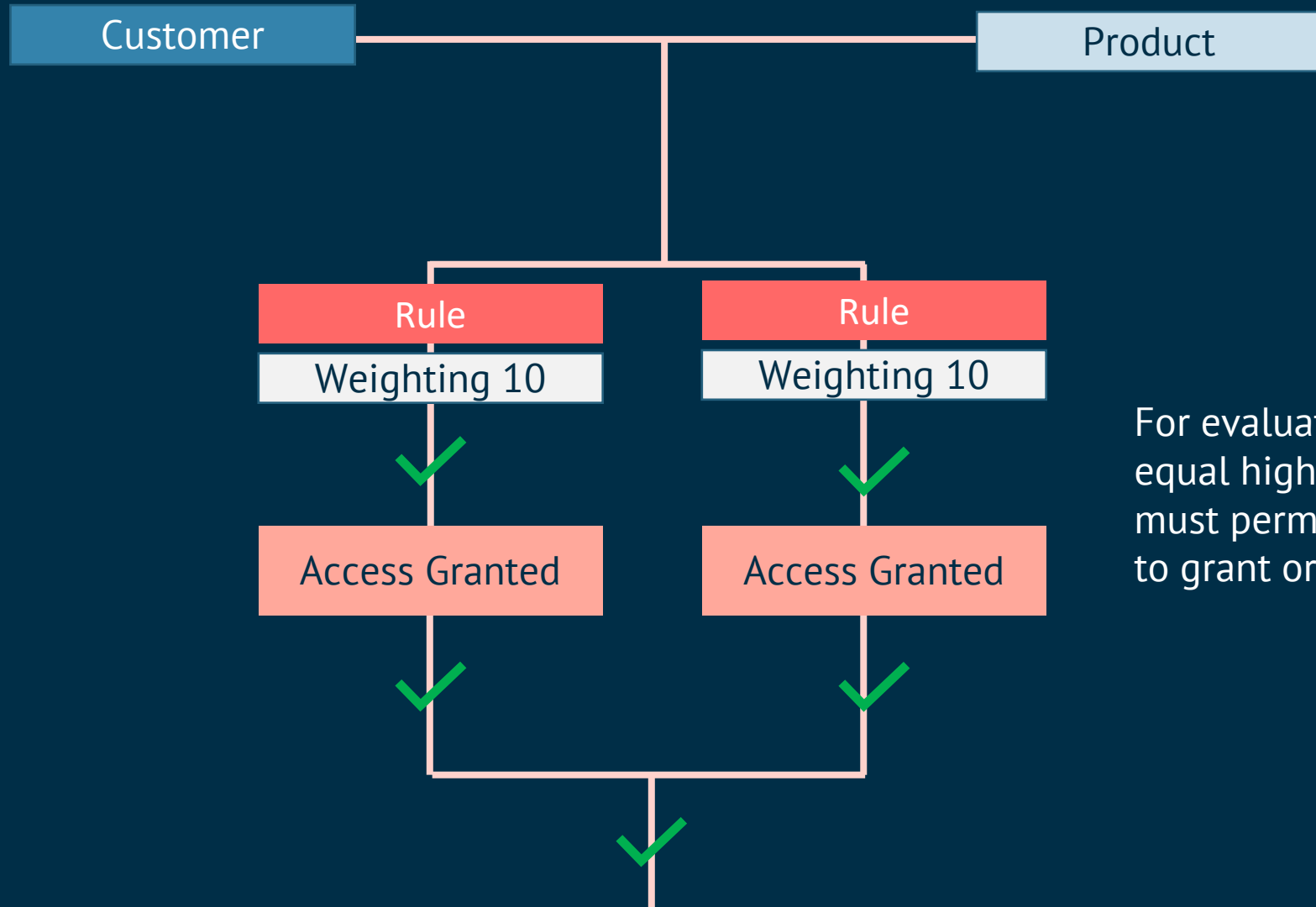


A connected Customer and Product can be addressed in multiple Rules.

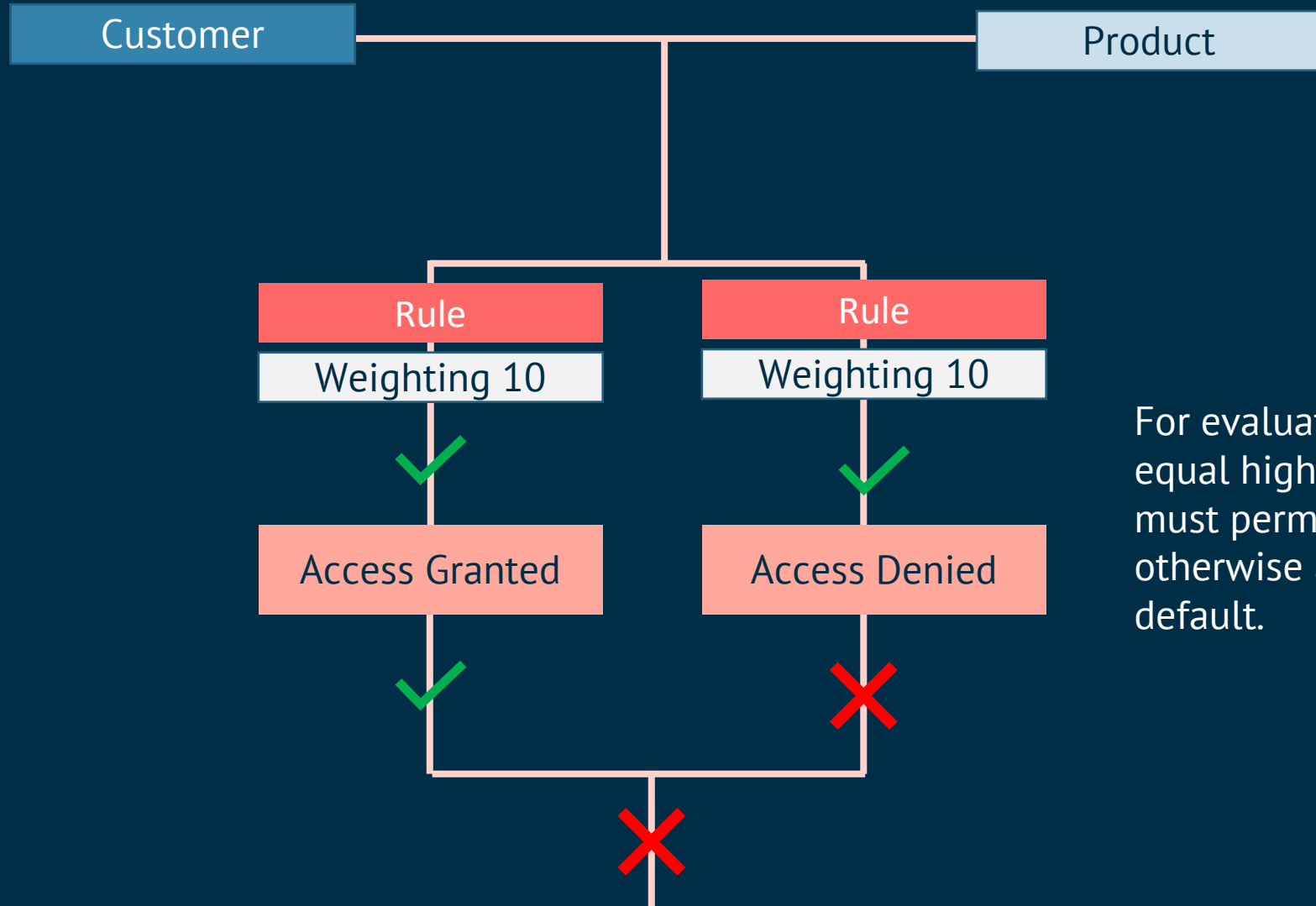
In order to establish priority, Rules are given a Weighting.

Rules with the highest weighting are evaluated first.

Rules with lower weighting will be ignored if the connection has already been addressed by a higher weighted rule.



For evaluated rules with an equal highest weighting, all must permit the same access, to grant or deny access.



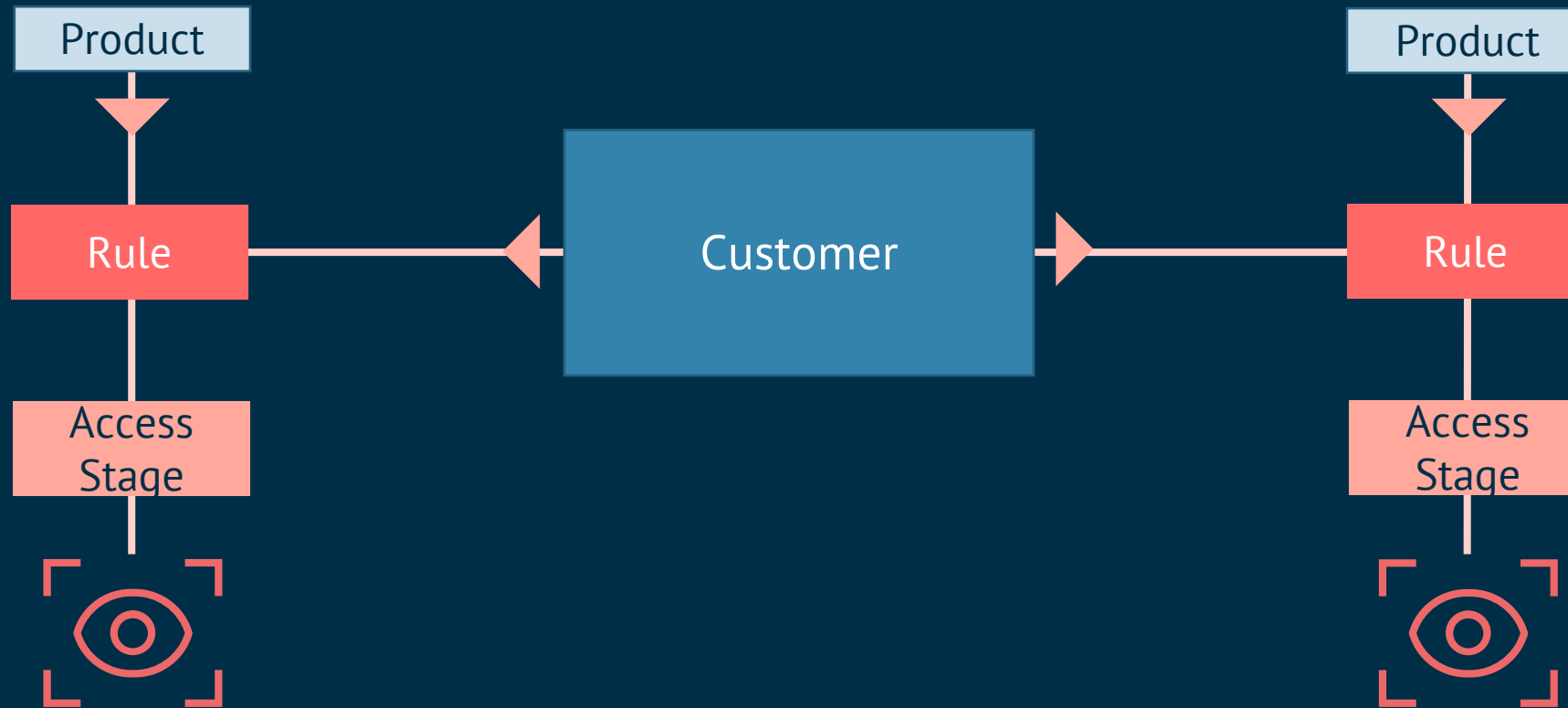
For evaluated rules with an equal highest weighting, all must permit the same access, otherwise access is denied by default.

*Scopes, Targets and Rules
Creation Demonstration*



Understanding Rules and Weightings

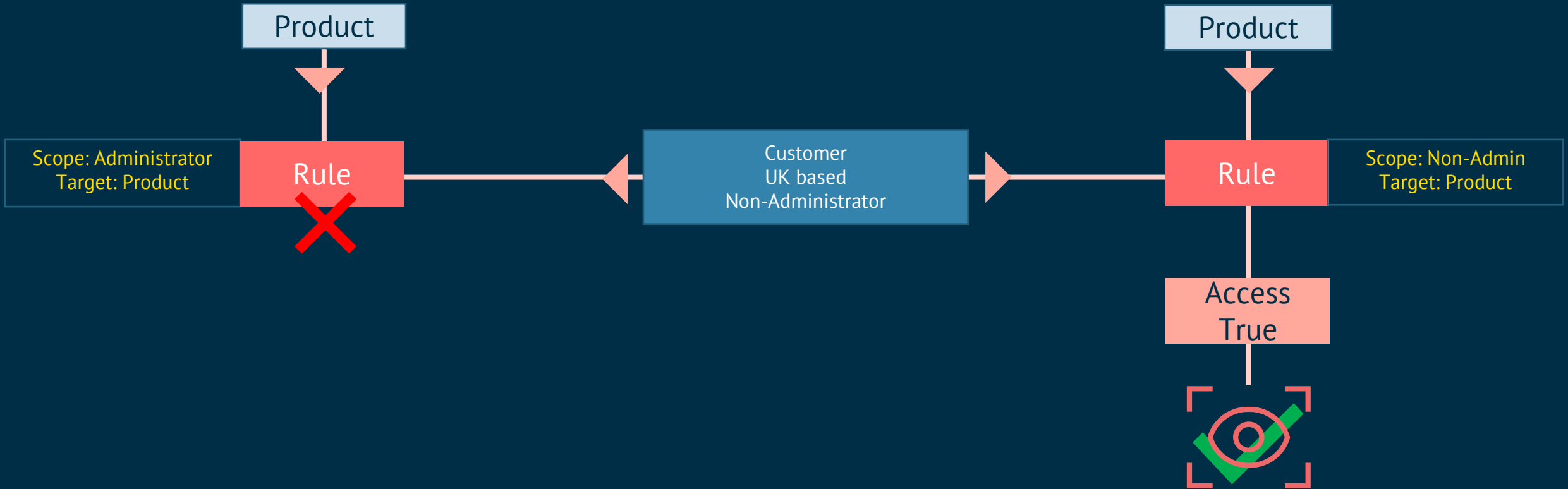
Scenario 1



Customer has logged into their account on your Storefront.

Based on Rules applied on the Storefront, we will investigate if Customer is able to access Products

The Connections between Customer and the Products may have one or two rules associated with them.



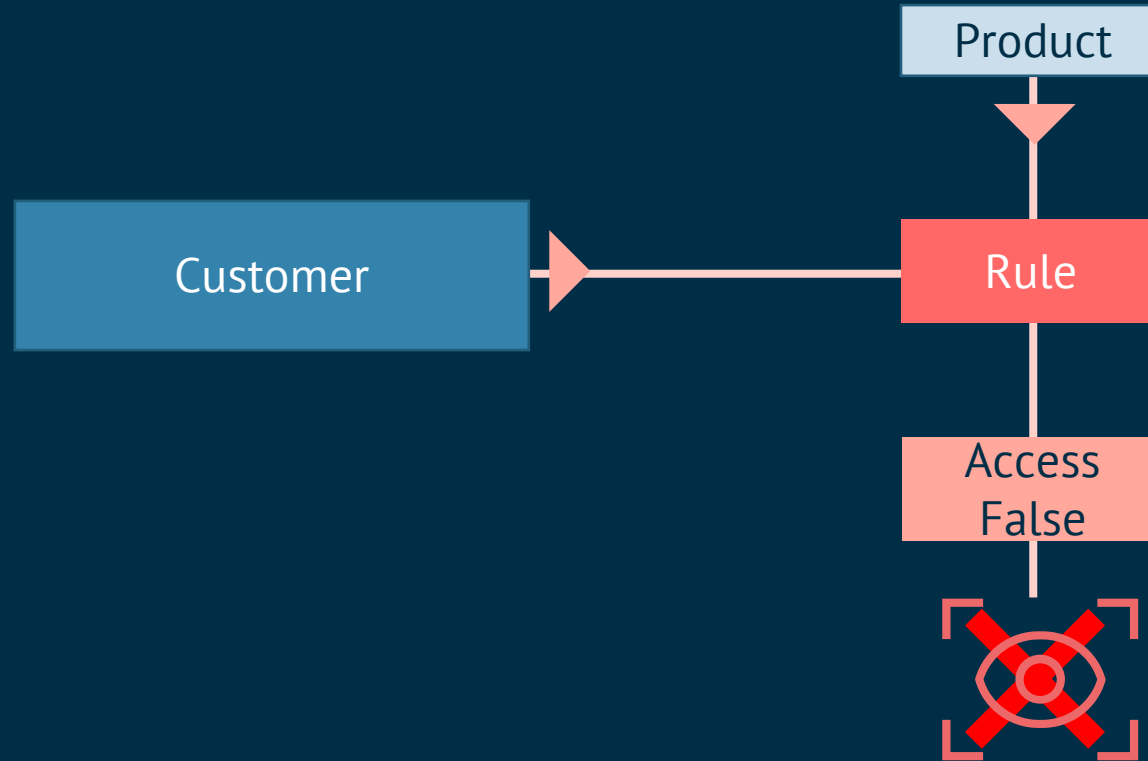
This rule **fails** evaluation as the scope does not match Customer.

Rule does not apply.

Customer meets the scope requirements so this rule **passes** evaluation.

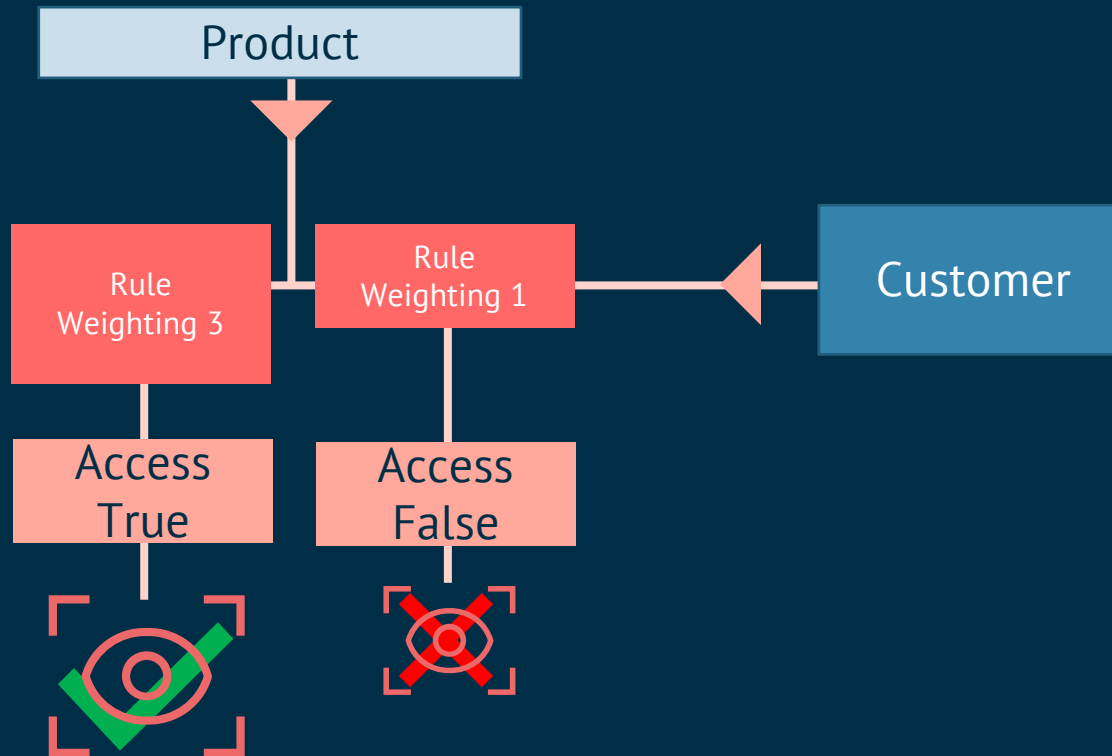
The rule **grants** access meaning Customer can access this product.

Rules can also specifically deny access to Products.



Customer meets the scope requirements so passes rule evaluation.

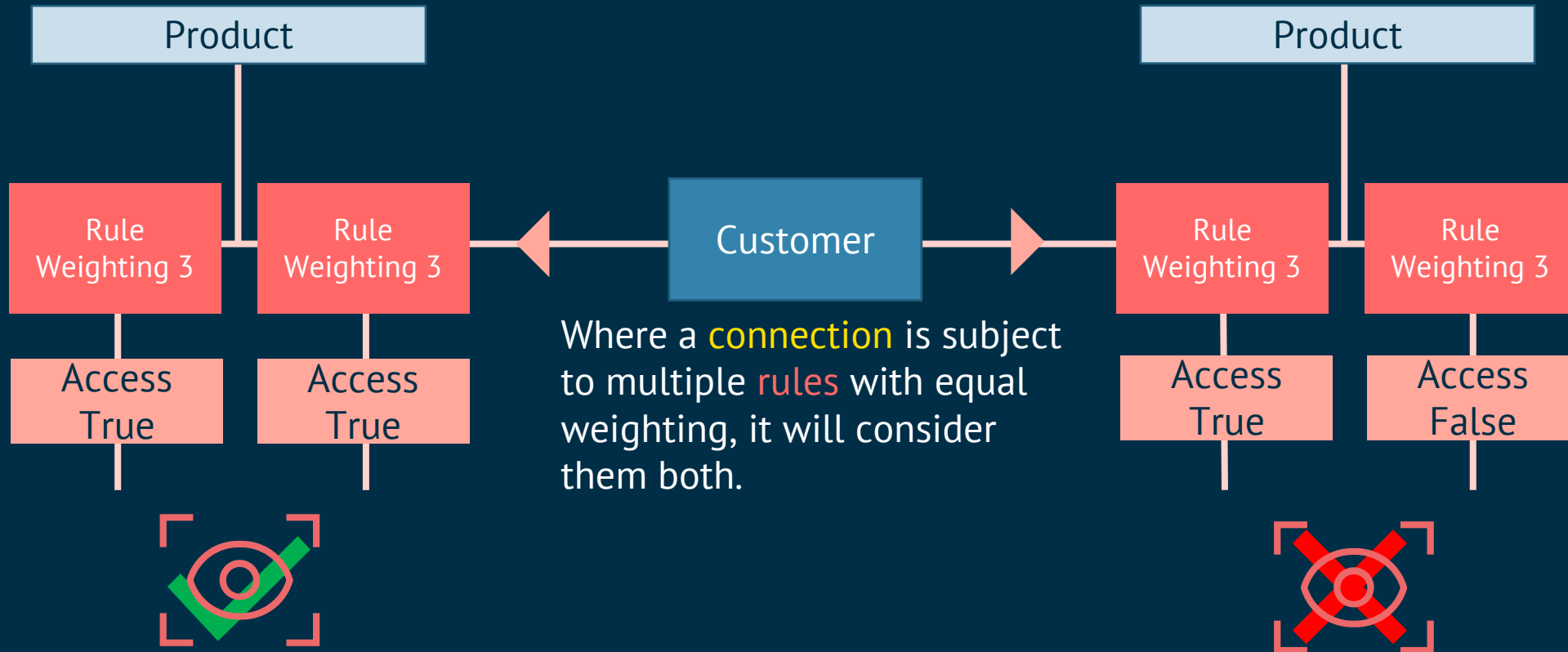
Access is **denied** in this instance based the rule configuration



Where a **connection** is subject to multiple **rules**, evaluation will proceed from maximum to minimum weighting.

The highest weighted rule to **pass** evaluation has access assessed.
Access is **granted** to the Product.

The lower weighted rule **passes** evaluation, but the connection has already been addressed.



If all rules pass evaluation then Access is assessed equally for each rule in the connection.

Access is granted to this product.

If equally weighted rules specify different access, access will be **denied** by default.

Manage Advanced Rules

Save

Scopes Targets Rule Groups **Access Permissions** Stock Management

Rules Automatic Rule Generation Settings

Add new record

Scope Id	Scope	Target Id	Target	Group	Weight	Has Access	Actions
80	Customer role: Registered	98	Product: Product 6 Even rule weighting Mixed access		2	false	Edit Delete
78	Customer: Customer@inf.igo	98	Product: Product 6 Even rule weighting Mixed access		2	true	Edit Delete
80	Customer role: Registered	97	Product: Product 5 Even rule weighting Access granted		2	true	Edit Delete
78	Customer: Customer@inf.igo	97	Product: Product 5 Even rule weighting Access granted		2	true	Edit Delete
80	Customer role: Registered	96	Product: Product 4 Uneven rule weighting		5	false	Edit Delete
78	Customer: Customer@inf.igo	96	Product: Product 4 Uneven rule weighting		10	true	Edit Delete
80	Customer role: Registered	95	Product: Product 3 Passes rule evaluation Denied Access		0	false	Edit Delete
80	Customer role: Registered	94	Product: Product 2 Passes rule evaluation Granted Access		0	true	Edit Delete
79	Customer role: Storefront Administrators	93	Product: Product 1 Fails rule evaluation		0	true	Edit Delete





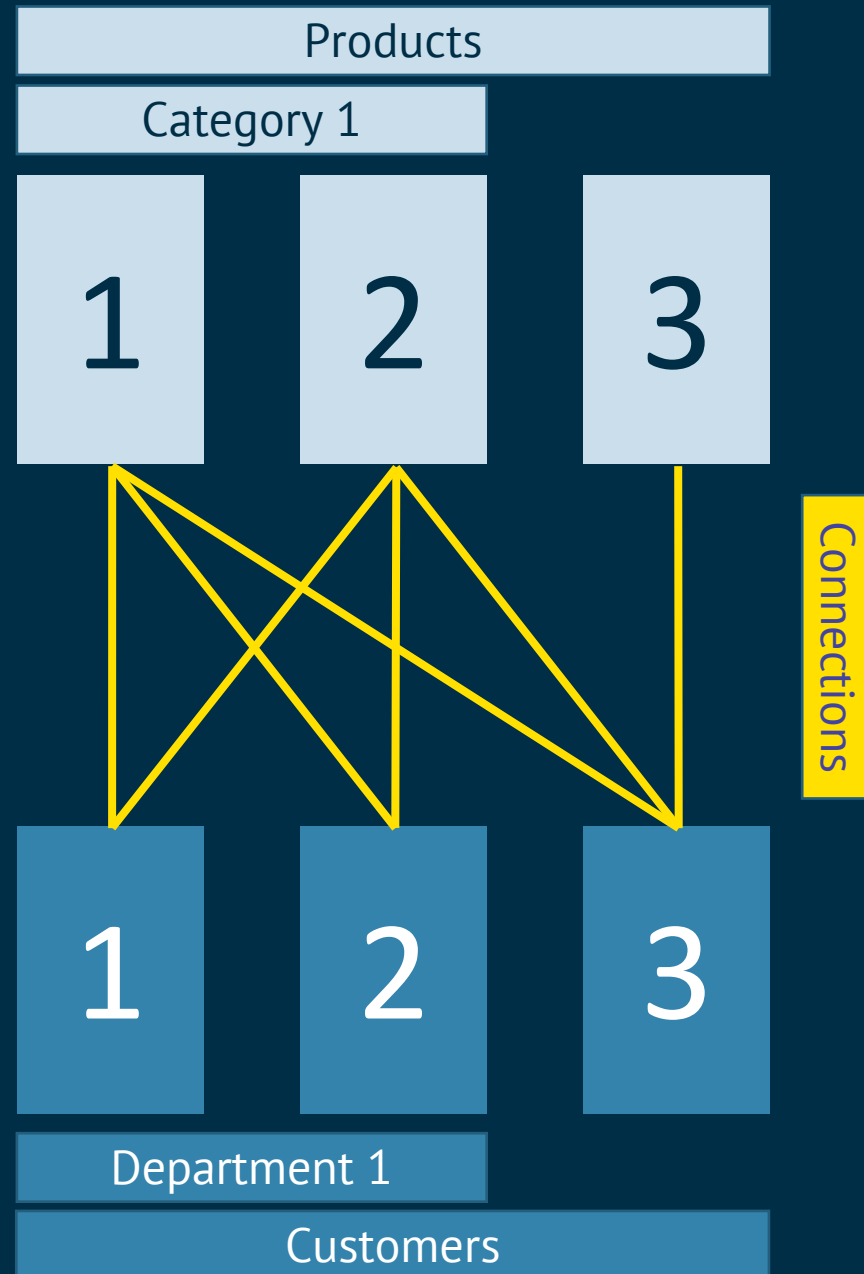
Understanding Rules and Weightings

Scenario 2

We have multiple rules establishing connections between Products and Customers.

We will address these rules in order of weighting and see what impact they have.

This scenario aims to clarify the order in which rules are enacted to influence connections.



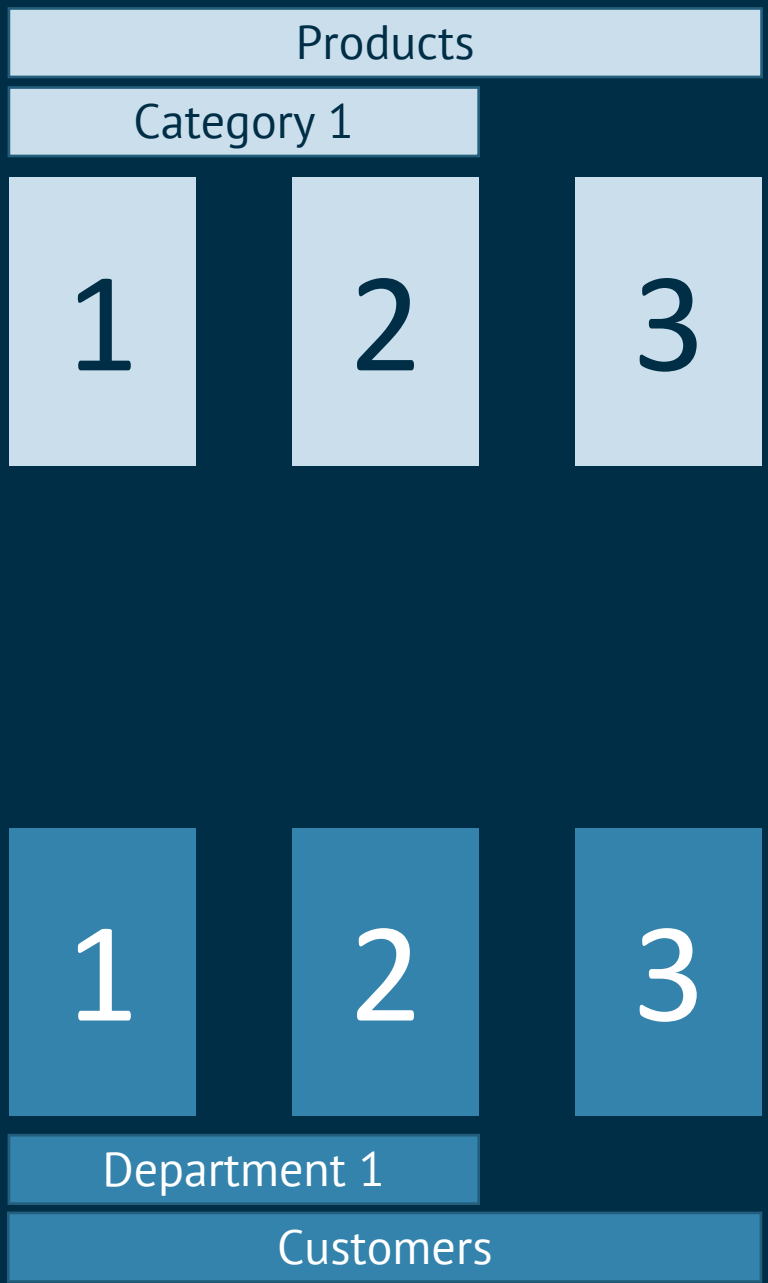


Default access denied

No customers have access to any products by default.

This is configured in the access permissions settings.

No connection between Product and Customer means default access applies.



Connections

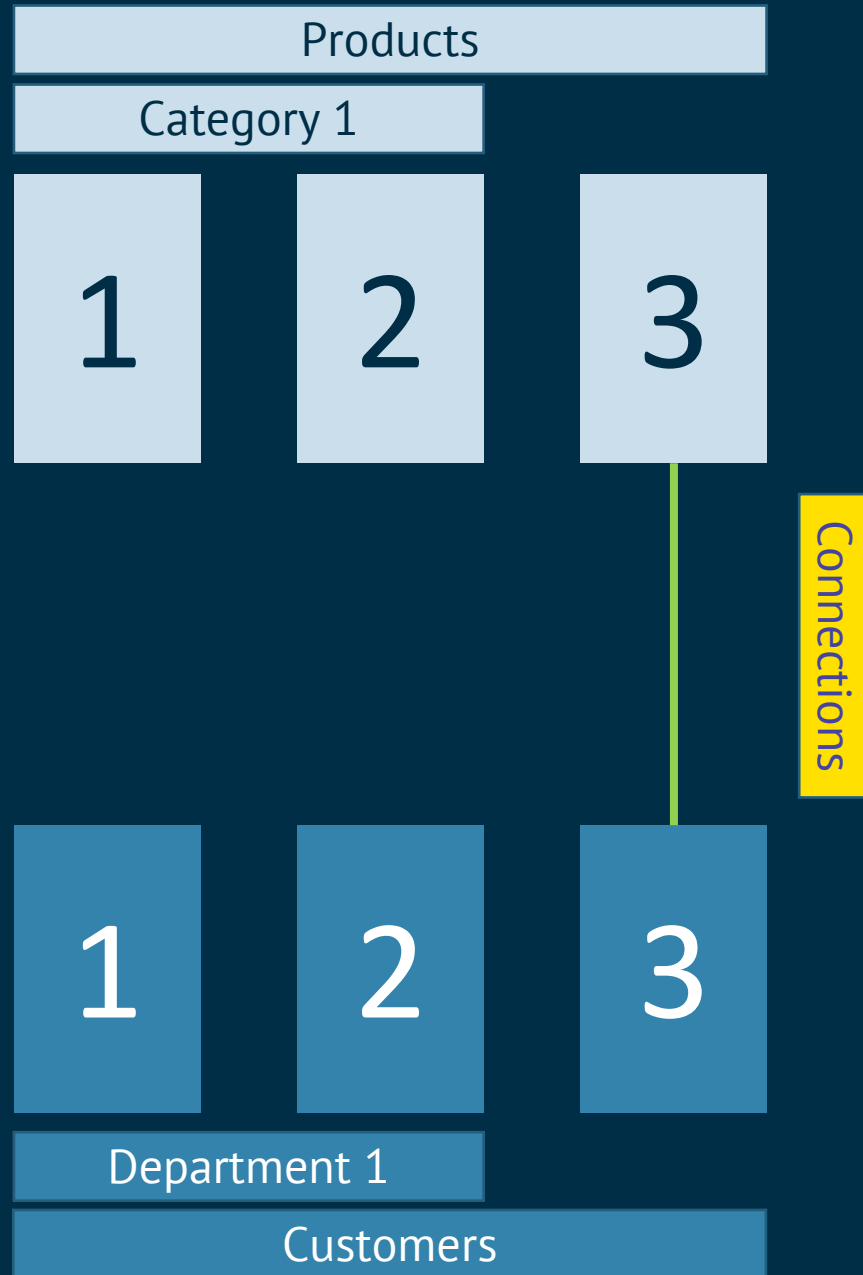


Customer 3
Access Granted to
Product 3

Weighting: 2

This is one of two rules with the equal highest weighting. These two are acted upon first with equal importance.

Here, establishes an access granted connection.



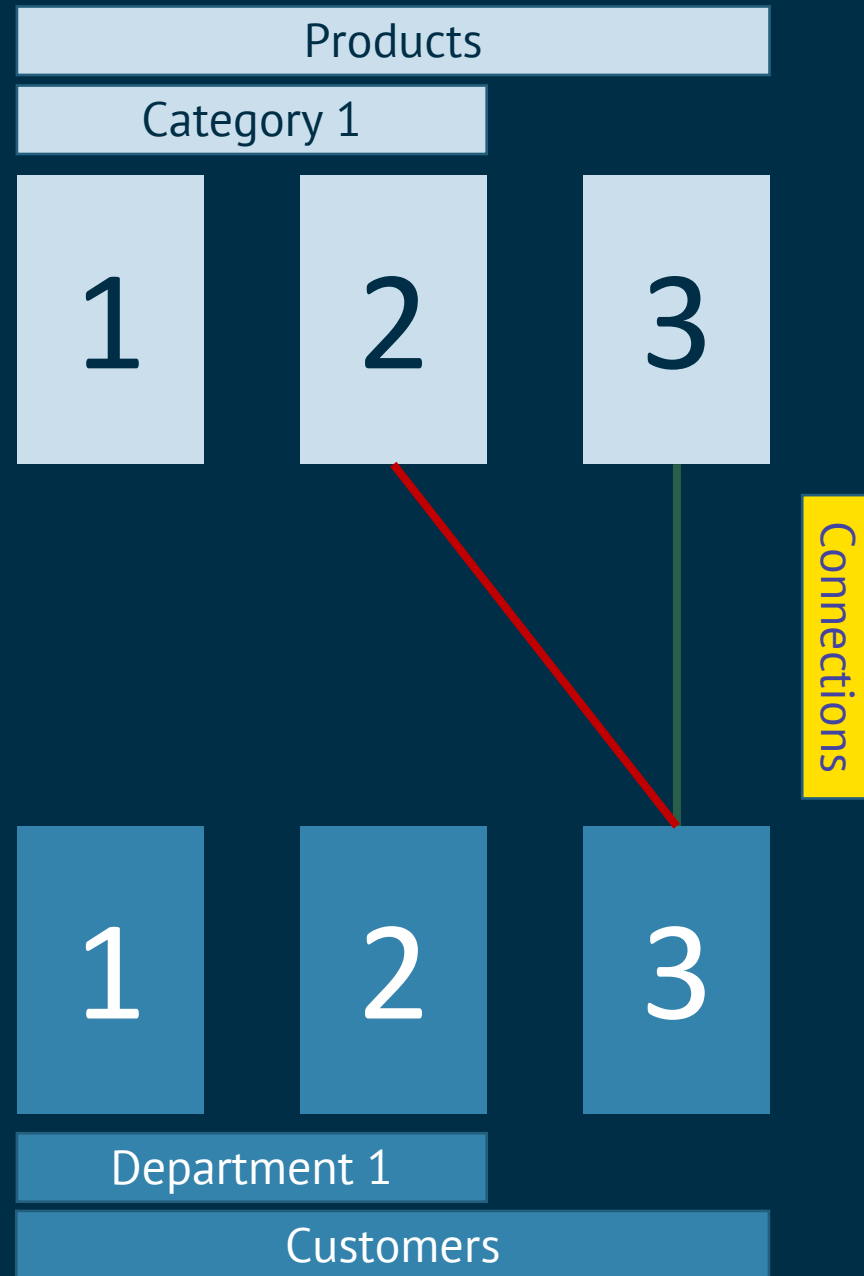


Customer 3
Access Denied to
Product 2

Weighting: 2

This is one of two rules with the equal highest weighting. These two are acted upon first with equal importance.

Here, establishes an access denied connection.

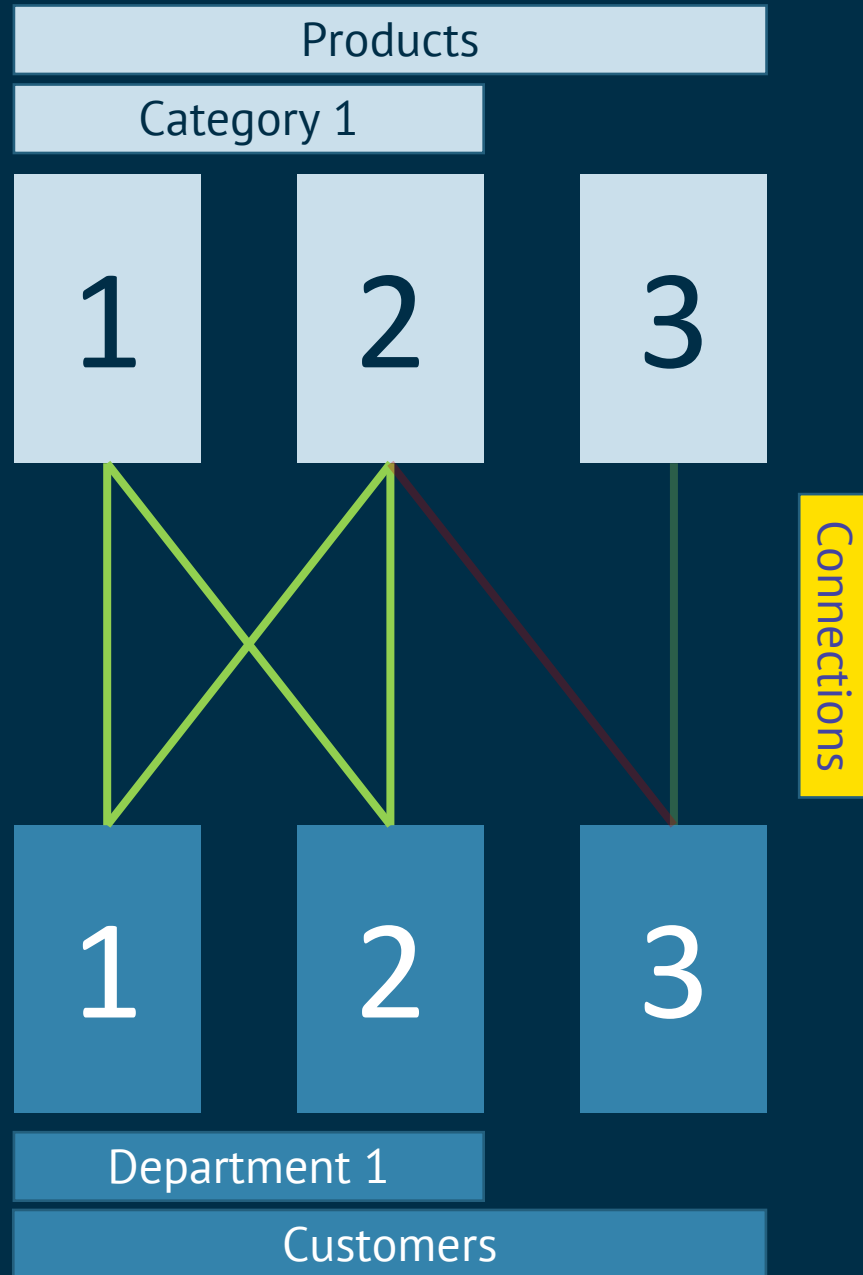




Department 1
granted access to
Category 1.

Weighting: 1

Rules can target multiple Products and
Customers at once.



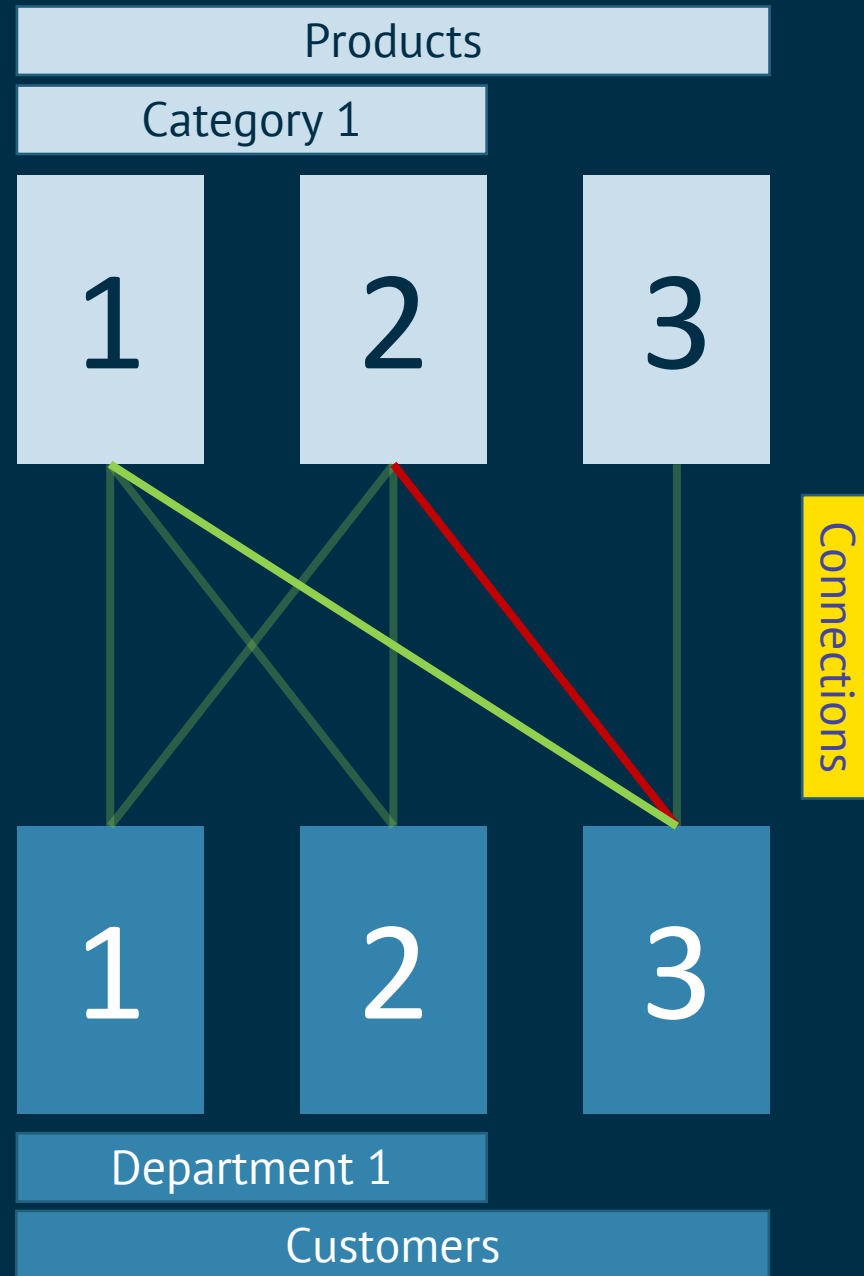


Customer 3
Granted access to
Category 1.

Weighting: 0

One of the connections covered by this rule
has already been addressed by a higher
weighted rule.

It is NOT changed from its original
connection.



Manage Advanced Rules

Save

Scopes Targets Rule Groups Access Permissions Stock Management

Rules Automatic Rule Generation Settings

Add new record

<u>Scope Id</u>	<u>Scope</u>	<u>Target Id</u>	<u>Target</u>	<u>Group</u>	<u>Weight</u>	<u>Has Access</u>	<u>Actions</u>
81	Customer: Customer3@inf.igo	101	Category: Category 1		0	true	Edit Delete
82	Department: Department 1	101	Category: Category 1		1	true	Edit Delete
81	Customer: Customer3@inf.igo	100	Product: Product 2		2	false	Edit Delete
81	Customer: Customer3@inf.igo	99	Product: Product 3		2	true	Edit Delete





Weightings Creation Demonstration



Rule Groups

Scenario 3

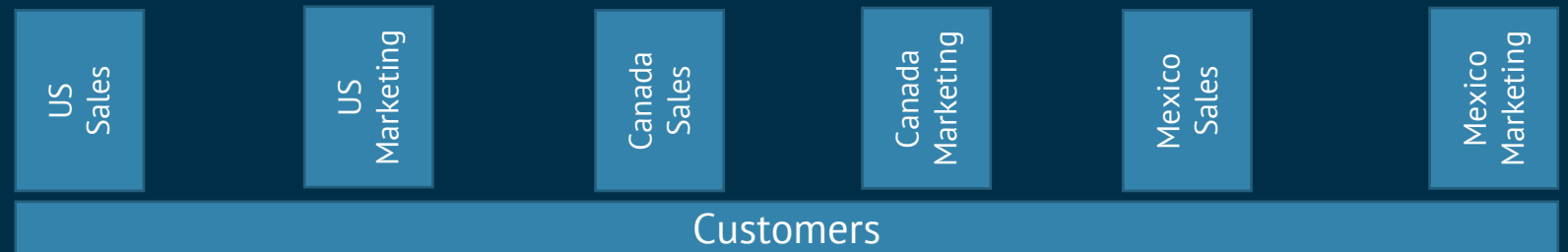
In this scenario, we have a set of products. Each of which may:

- Be location restricted
- Be role restricted
- Not be restricted
- Have both role and location restrictions



We must establish an effective system of governing this complex arrangement.

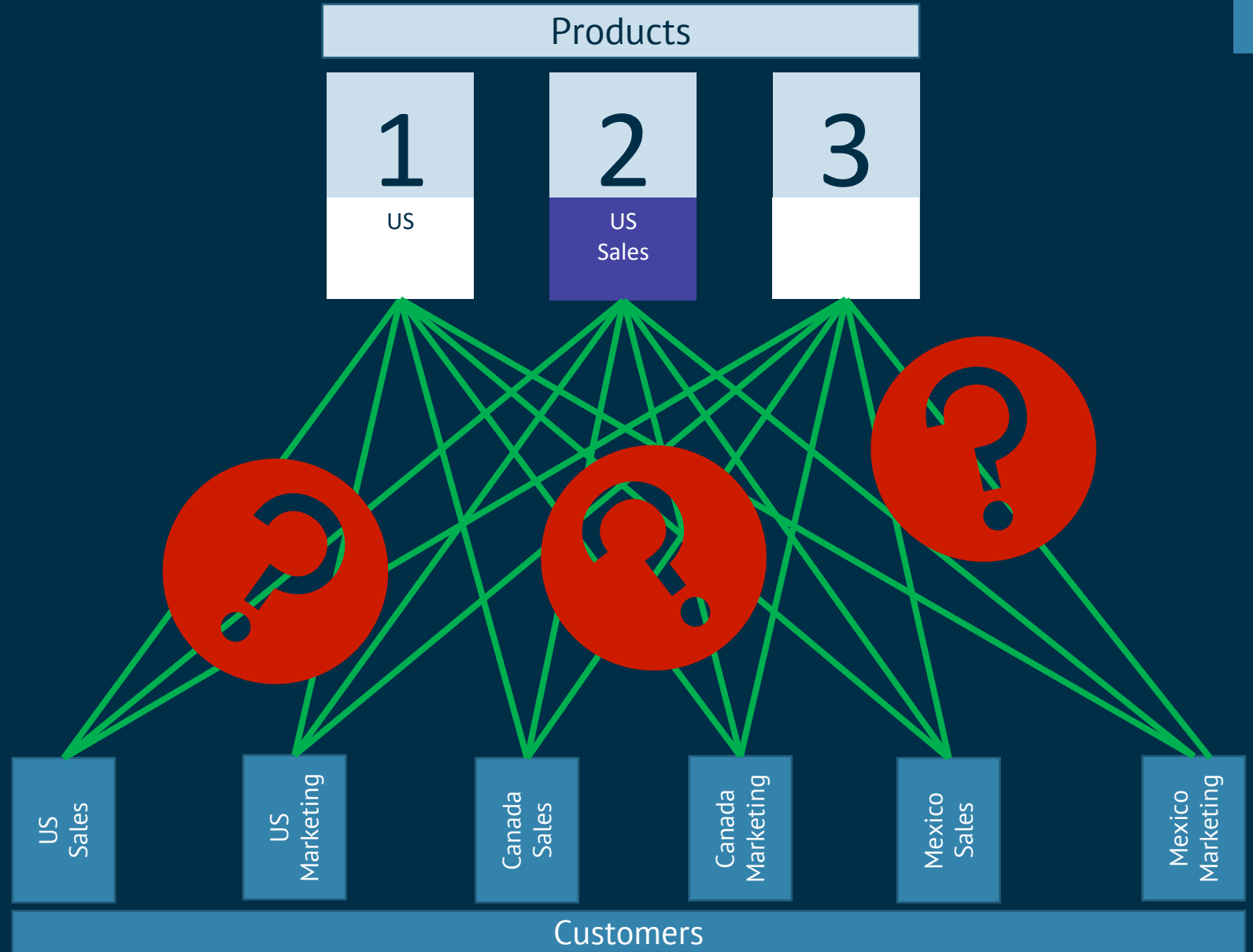
This scenario aims to introduce the concept of Rule Groups for simplifying complex access requirements.



Due to the complexities of multiple, potentially conflicting restrictions, creating a fully working set of rules using weightings would either be impossible or give you a very big headache.



This is where Rule Groups come into play!



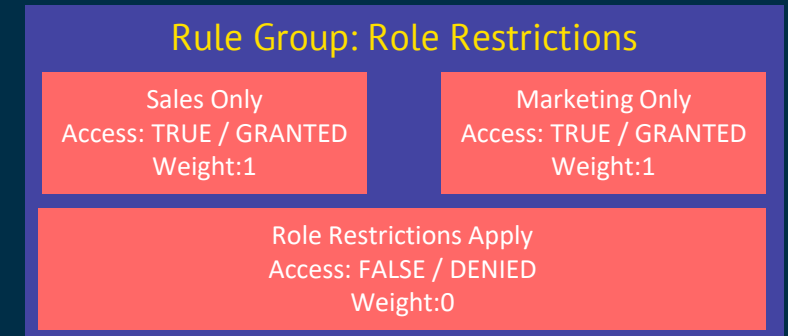
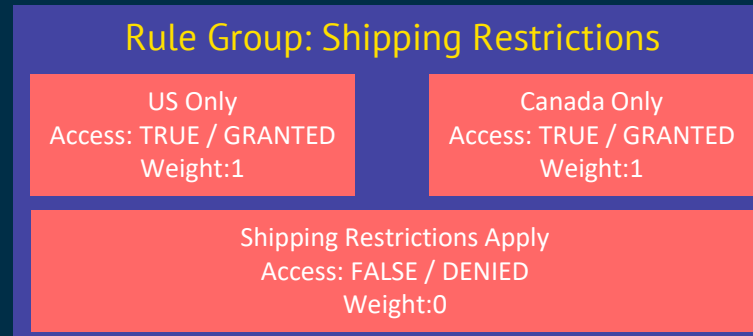
In our example, we have divided our rules in to two rule groups, Shipping and Role restrictions.

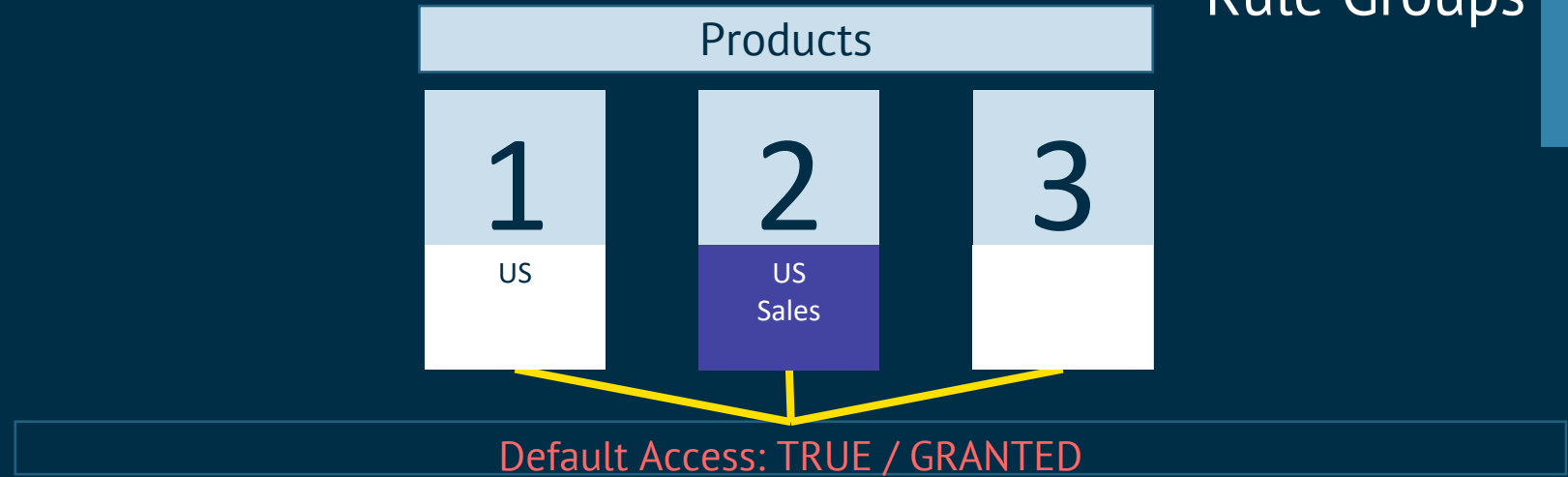


Default Access: TRUE / GRANTED

Each Rule Group contains 2 rules:

- The higher weighted rule grants access to individual options of the restriction (such as country, or role).
- The lower weighted rule denies access to all other products with that restriction.

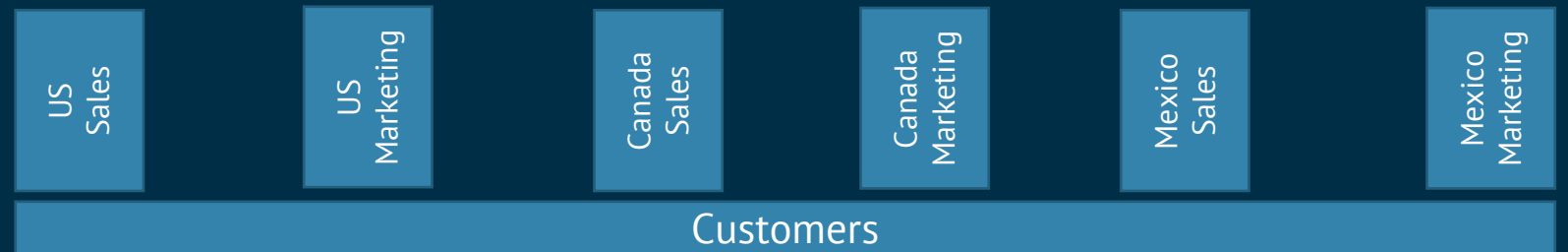




The **default access** in this scenario is TRUE / GRANTED

Every Product can be accessed by every Customer.

This means any product not involved in any of the restrictions will be automatically accessible.





Rule Groups

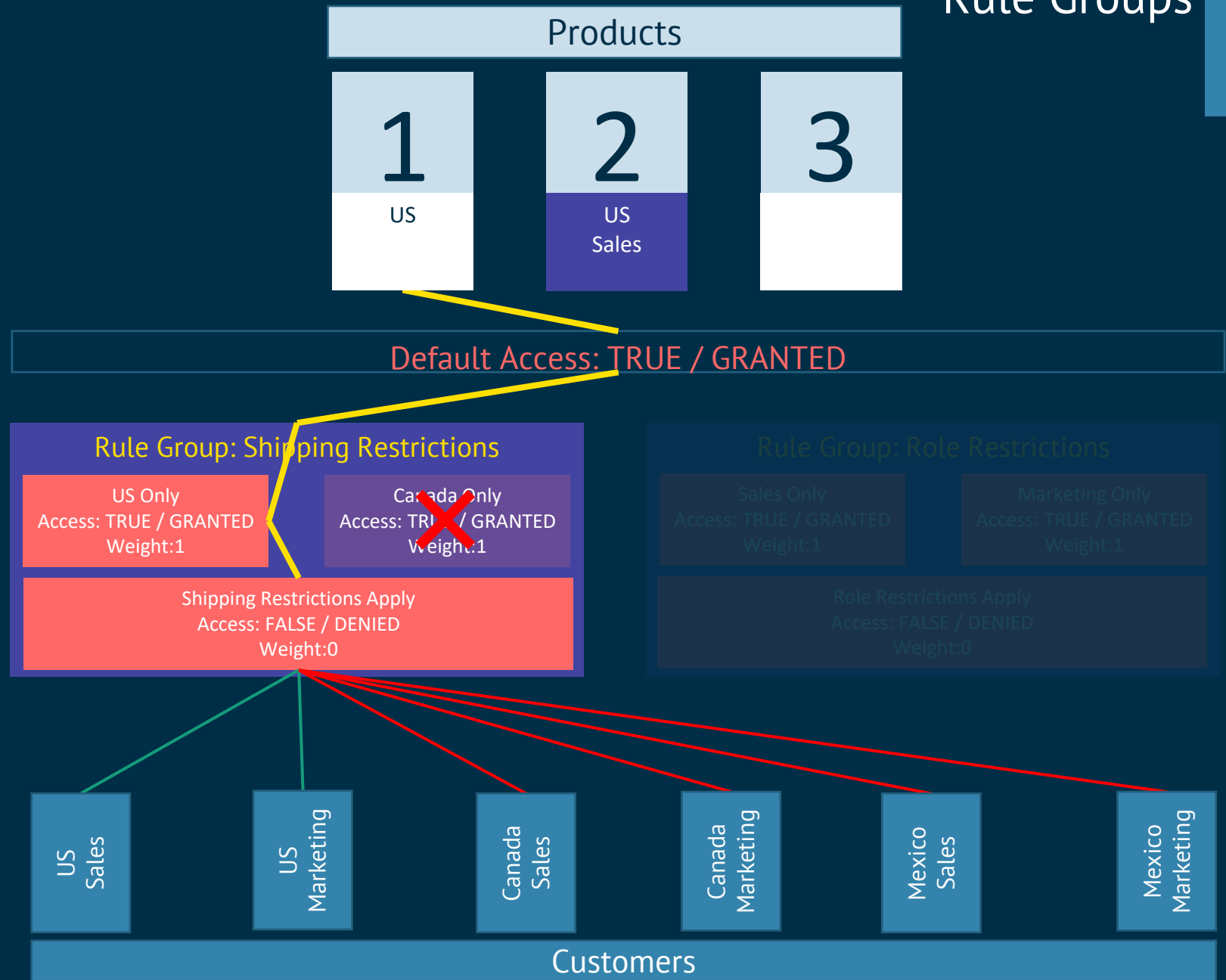
Rule groups are evaluated individually.

Let's evaluate the Rules within the Shipping Restrictions Rule Group.

We see Product 1 has applied Shipping Restrictions, for US only, so 2 of the 3 Rules pass evaluation.

Here, that consists of:
Step 1: Access **granted** to US products.
Step 2: Access **denied** to all restricted products not covered in Step 1.

2 Users will gain a **connection granting** access to Product 1.
4 users will gain a **connection denying** access to Product 1.



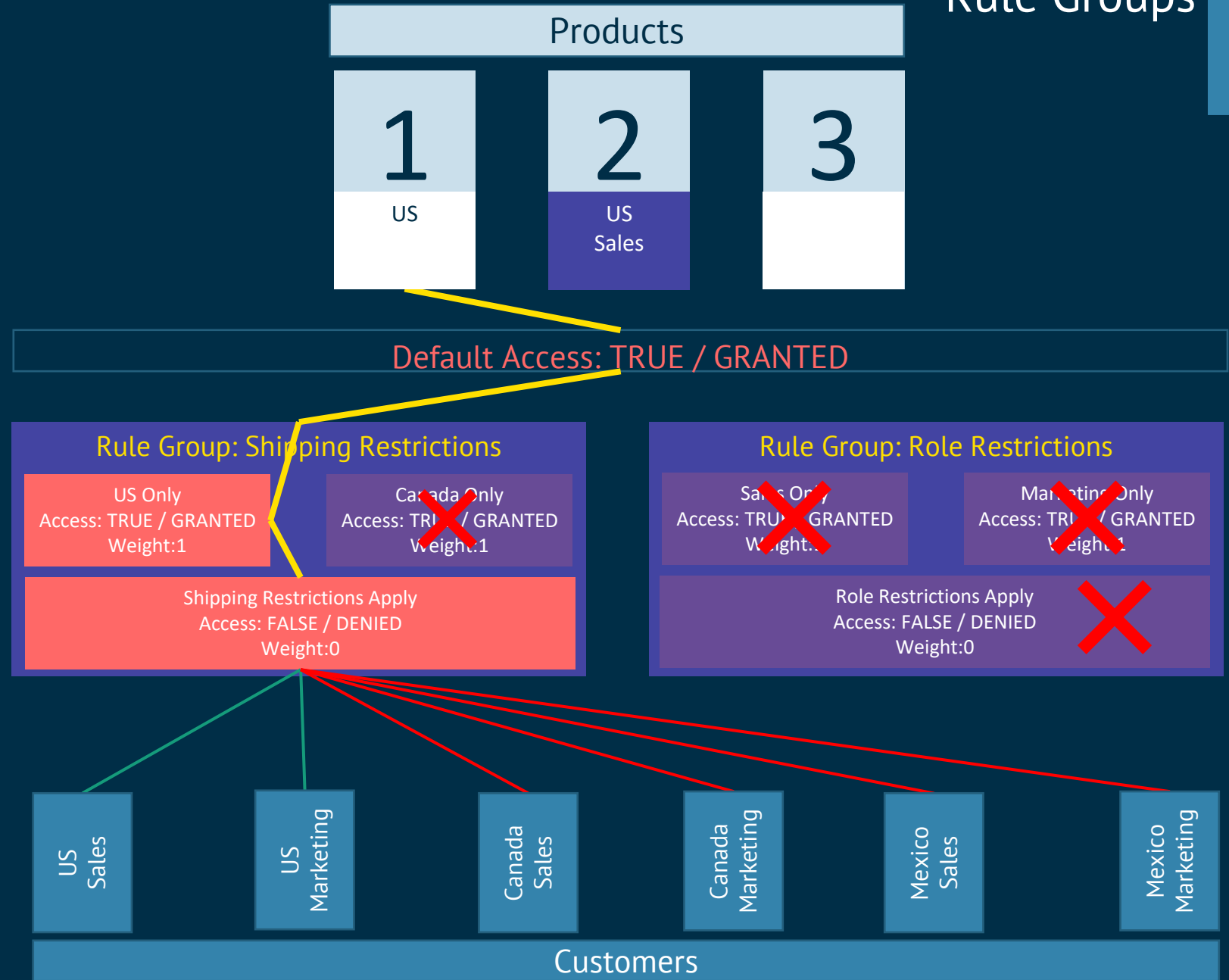


Rule Groups

When Rule Groups are utilised, the **connection** between Product and Customer will only grant access if ALL applicable Rule Groups agree it should be so.

Here, that only relies on 1 Rule Group, as all Rules in the Role Restrictions group fail evaluation.

So, the final result is that 2 Customers can access Product 1.

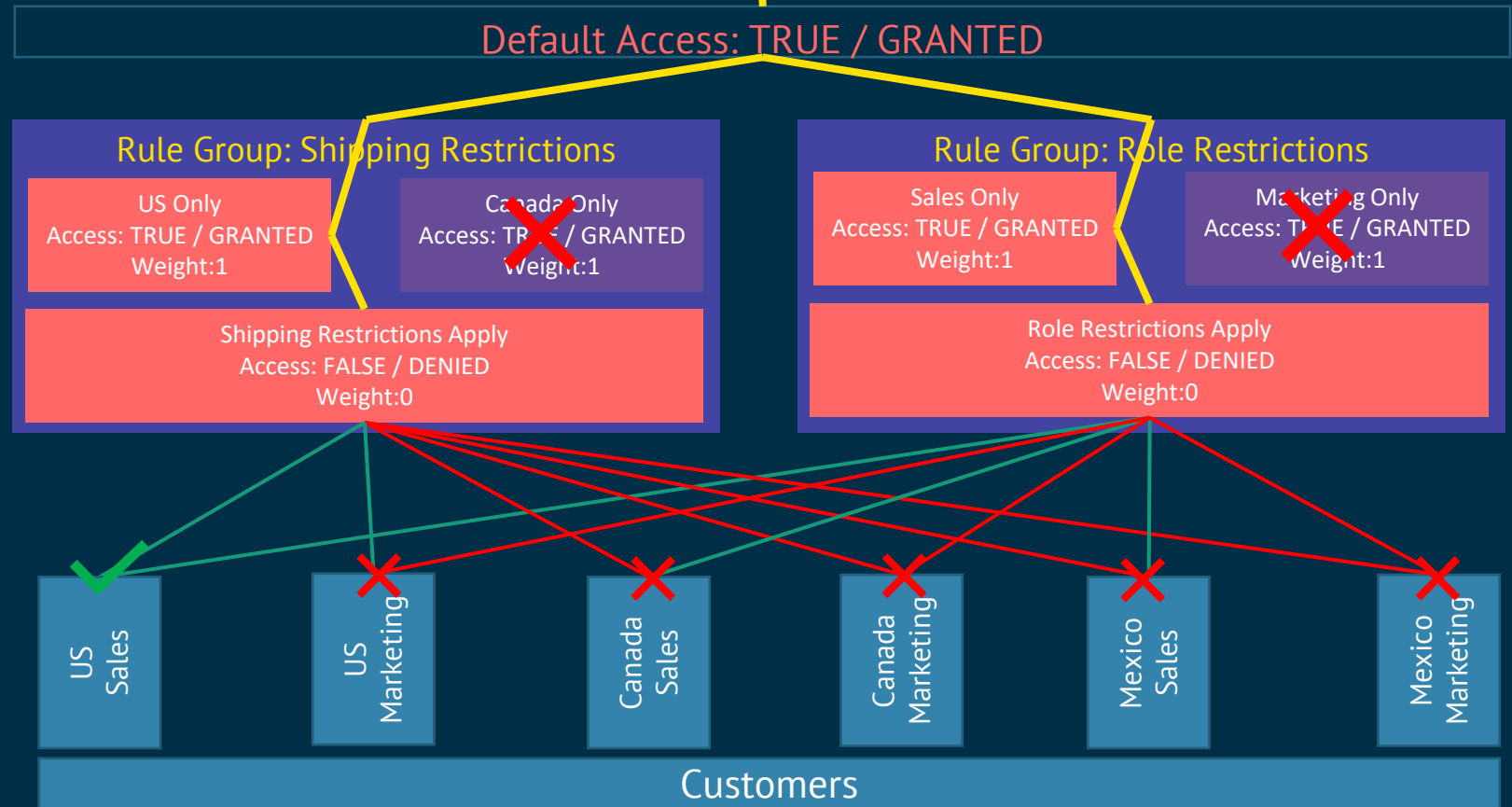




For Product 2, we can see that both Rule Groups are applicable.

The Rule Groups:

- Agree to **grant** access to 1 user.
- Agree to **deny** access to 2 users.
- Cannot agree on 2 users, so **deny** access.





Rule Groups



For Product 3, none of the rules in either group pass evaluation

In our example, this means only the default access applies.

As a result, ALL Customers can access Product 3.

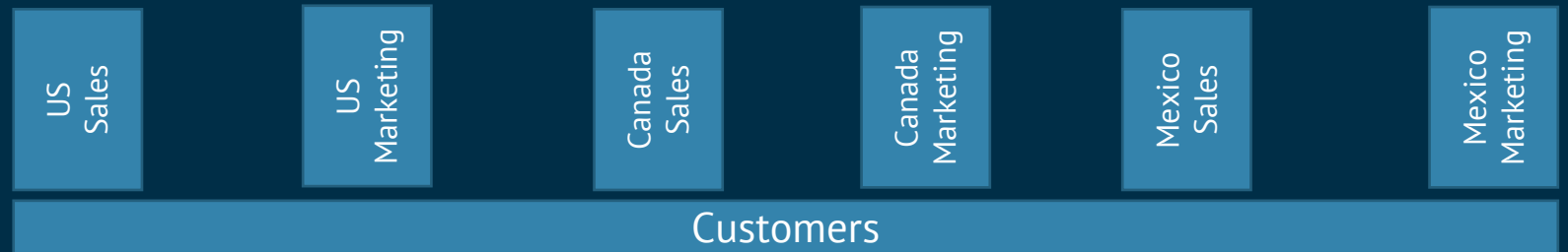
Default Access: TRUE / GRANTED

Rule Group: Shipping Restrictions

US Only Access: TRUE / GRANTED Weight:1	Canada Only Access: TRUE / GRANTED Weight:1
Shipping Restrictions Apply Access: FALSE / DENIED Weight:0	

Rule Group: Role Restrictions

Sales Only Access: TRUE / GRANTED Weight:1	Marketing Only Access: TRUE / GRANTED Weight:1
Role Restrictions Apply Access: FALSE / DENIED Weight:0	



Manage Advanced Rules

Save

Scopes Targets Rule Groups **Access Permissions** Stock Management

Rules Automatic Rule Generation Settings

Add new record

Scope Id	Scope	Target Id	Target	Group	Weight	Has Access	Actions
88	Everyone	109	Tag: Role Restrictions	Role Restrictions	0	false	Edit Delete
84	Customer role: Marketing	106	Tag: Marketing	Role Restrictions	1	true	Edit Delete
83	Customer role: Sales	103	Tag: Sales	Role Restrictions	1	true	Edit Delete
88	Everyone	108	Tag: Shipping Restrictions	Shipping Restrictions	0	false	Edit Delete
86	Customer role: Canada	105	Tag: Canada	Shipping Restrictions	1	true	Edit Delete
85	Customer role: US	104	Tag: US	Shipping Restrictions	1	true	Edit Delete





*Rule Groups
Creation Demonstration*



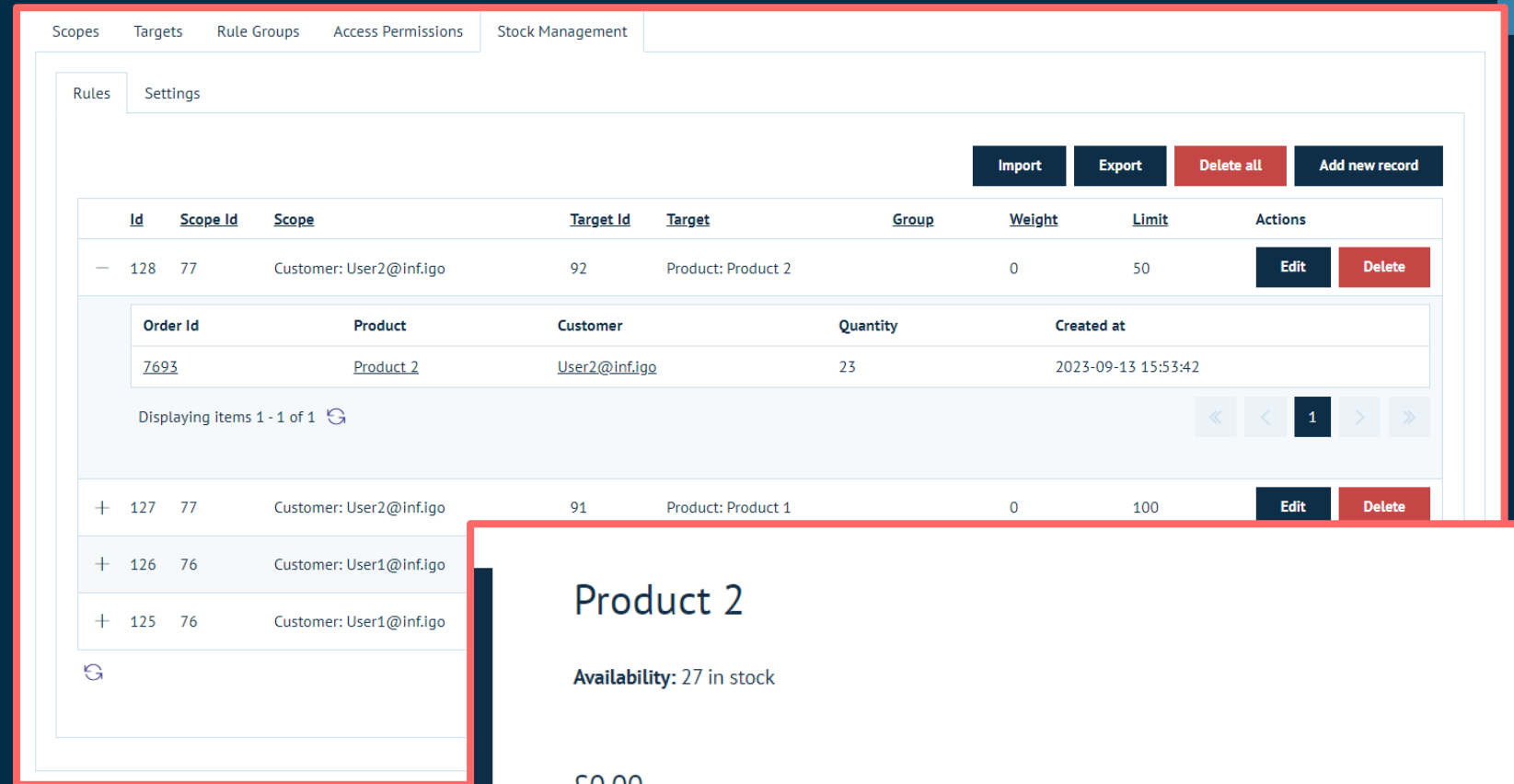
Stock Management

Gives administrators the ability to control how many of each Product Customers can purchase.

Keeps track of previous orders and deducts this from a Customer's available total.

Will provide a live display of available stock and provide warnings of unavailable stock on the front-end.

Works seamlessly with the larger Access Permissions functionality.



The screenshot shows the 'Stock Management' section of the application. It features a navigation bar with tabs for 'Scopes', 'Targets', 'Rule Groups', 'Access Permissions', and 'Stock Management'. Below this, there are tabs for 'Rules' and 'Settings'. The main area contains a table of rules with columns for Id, Scope Id, Scope, Target Id, Target, Group, Weight, Limit, and Actions. The table lists three rules for different products and customers. Below the table, there is a detailed view for 'Product 2' showing its availability (27 in stock), price (£0.00), and a quantity input field set to 30. A red warning message at the bottom states: 'Your maximum allowed quantity is 27. Please contact administrator to change this'.

Id	Scope Id	Scope	Target Id	Target	Group	Weight	Limit	Actions
128	77	Customer: User2@inf.igo	92	Product: Product 2		0	50	Edit Delete
127	77	Customer: User2@inf.igo	91	Product: Product 1		0	100	Edit Delete
126	76	Customer: User1@inf.igo						
125	76	Customer: User1@inf.igo						

Order Id	Product	Customer	Quantity	Created at
7693	Product 2	User2@inf.igo	23	2023-09-13 15:53:42

Product 2

Availability: 27 in stock

£0.00

Qty

Add to basket

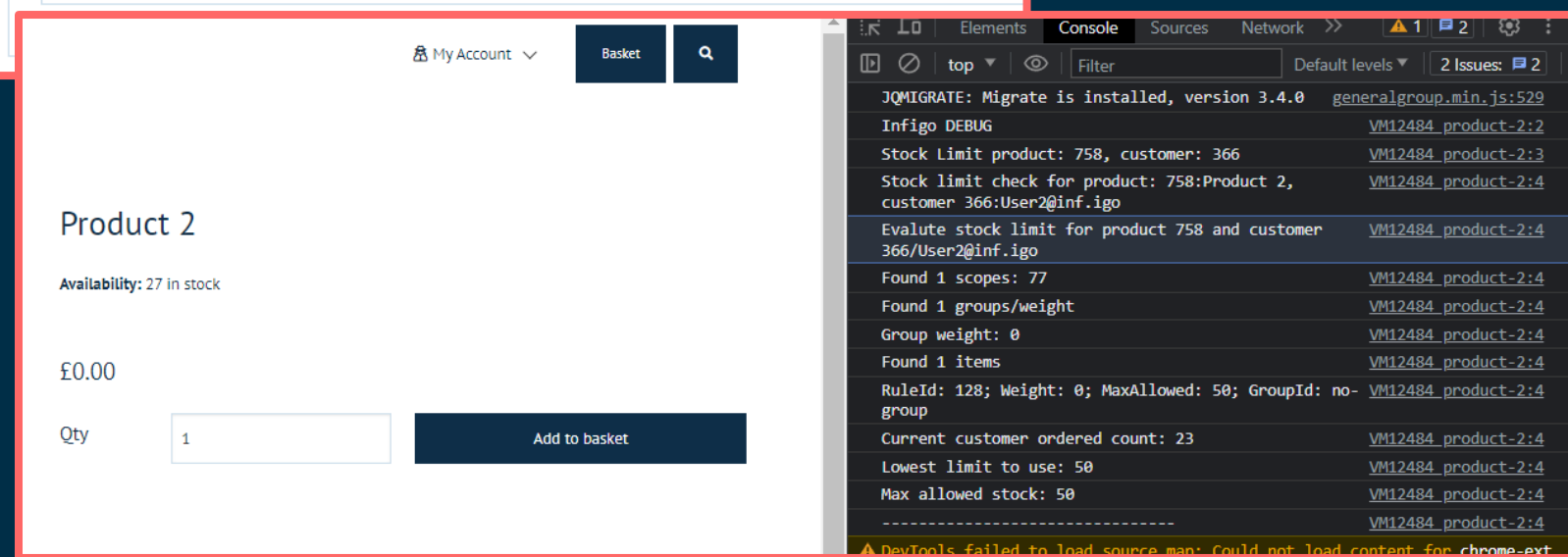
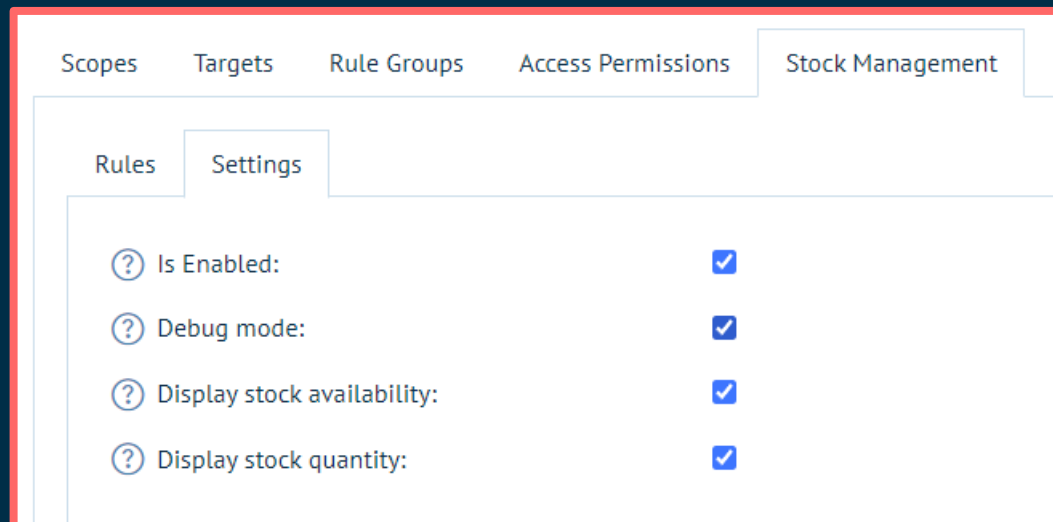
ⓘ Your maximum allowed quantity is 27. Please contact administrator to change this

Is Enabled | General on/off switch for the use of Stock Management

Debug mode | Show the evaluation of stock levels in the browser console on a product landing page

Display stock availability | Display to the user whether stock is available for this product, but with no precise numbers.

Display stock quantity | Display the exact quantity of stock remaining to the customer.





Stock Management Demonstration





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