

Set Up Your System

This tutorial guides you through the Dev Center workflow. At the end of this tutorial, you'll be able to administer users and development assets on the platform for your organization.

Request a Dev Account

Go [here](#) and fill out the form to request a demo. A representative will contact you with more information about a Dev Account. After Kibo provisions your Dev Account, you'll receive an email invitation with instructions for logging in to Dev Center.

The person who receives this email invitation is the Dev Account Owner, which is a role that is granted administrative permissions.

Configure Account Information

The Dev Account Owner should configure contact details for your organization.

1. Go to <http://developer.mozu.com/login>.
2. Click **Console** and enter your login credentials.
3. Click your **Developer Account**.
4. Click **Settings > Account Info**
5. Enter your contact details and click **Save**.

Invite Users

The Dev Account Owner should invite users so your team can begin development.

1. Log in to Dev Center.
2. Click the drop-down arrow beside the name of your DevAccount in the upper-right corner and click **Users > Invite Users**.
3. Enter the user's email address.
4. Select a role from the drop-down menu.
5. Click **Save**.

Inviting users sends an email to the specified recipient with a confirmation link. The invitation remains in a pending status until the recipient confirms or declines the invitation.

You should consider what role a user needs before inviting them to your Dev Center account. A role is a collection of permissions that defines what a user can do in Dev Center. A user can have different roles in multiple Dev Accounts, but can only perform the behaviors of the role associated with that specific Dev Account. For example, in Dev Account A, if you define Steven as a Lead Developer, but in Dev Account B, you define Steven as a Marketer, he cannot perform the

marketing role in Dev Account A. Behaviors within a role are predefined, so users cannot add or remove behaviors from a role.

Create a Project

Projects are optional, but Kibo recommends creating them to group all sandboxes, applications, themes, and team members associated with a particular body of work. Having one location to view and manage the items associated with a project makes managing the project easier. If you are a Kibo partner, we strongly recommend you create a project for each of your clients.

Assign the Project Manager role to a user in your organization to restrict project administration permissions. Refer to [Roles and Permissions](#) for more information.

To create a project:

1. Log in to Dev Center.
2. Click **Projects > Create Project**.
3. Enter a name for the project and click **Save**.
4. Double-click the project in the grid to open the project Home page.
5. Define the parameters of your work and add team members.
6. Create new or add existing sandboxes, applications, and themes to the project by clicking the icon in each section of the left pane. Clicking a sandbox, application, or theme in the left pane displays an editor for the selected item so you can take further action (e.g., install applications/themes on a sandbox, add users to a sandbox, configure application behaviors, and review theme assets).

Develop Applications and Themes

Now that your development team has access to Dev Center and their roles are defined, they can begin developing applications and themes. You can also browse third-party applications and install them on a sandbox from the App Marketplace instead of developing custom applications. Refer to the following topics for more information:

- [App Marketplace](#)
- [Get Started with Applications](#)
- [Email Template Customization](#) (for creating and installing themes)

Test Your Code

To test application and theme assets you've developed, you must install them on the sandbox. A sandbox simulates a production environment, but is used exclusively for testing and is maintained separately from production environments.

Use this section to understand how to provision a sandbox, install your development assets, and view the sandbox.

Provision a Sandbox

You can create new sandboxes within Dev Center. However, there is a limit of 10 sandboxes per developer account. If you are at the limit and need to add another, Kibo recommends removing an existing sandbox and replacing it with the new one.

1. Log in to Dev Center.
2. Click **Sandboxes > Create Sandbox**.
3. Enter a name to identify the sandbox.
4. Select a template from the drop-down menu. The type of template you select depends on the type of testing you need to conduct:
 - To quickly set up a new environment with a pre-configured master catalog, catalog, and site defaults, select a Kibo -supplied template (displayed in blue in the template drop-down list).
 - To clone one of your existing sandboxes, select it from the template list (displayed in black in the template drop-down list).
 - To build your own master catalog, catalogs, and sites, start with a blank environment by selecting **None** from the template drop-down list.
5. Select the locale, currency, and country codes for the site's catalog.
6. Click **Save**.

Provisioning a sandbox grants all current Dev Account users the SuperAdmin role on that sandbox, which means they can modify the sandbox within Dev Center and Admin . However, if you invite a user to your Dev Account *after* provisioning a sandbox, the user is denied access to that sandbox and all other sandboxes associated with your Dev Account. The Dev Account Owner or Project Manager roles should administer user access to sandboxes from within the designated project.



Creating a new site in a sandbox may take up to 30 minutes before the cache refreshes and the site's settings are available for configuration.

Install Development Assets on a Sandbox

To install development assets:

1. Log in to Dev Center.
2. Click **Develop > Applications** or **Develop > Themes** (depending on the type of asset you want to install).
3. Locate your application or theme in the grid, right-click it, and select **Edit**.

4. Click **Install**.
5. Select your sandbox and click **OK**.

Newly installed applications must also be enabled in Admin.

1. Log in to Dev Center
2. Click **Sandboxes**.
3. Locate your sandbox in the grid, right-click it, and select **View**.
4. If prompted, log in to Admin .
5. Click **Settings > Applications**.
6. Click on your application.
7. Click **Enable**.

Migrate Subnav Links Between Sandboxes

Subnav links allow external pages to be linked for products, discounts, categories, and the main menu. For example, the Import/Export 2.0 tool installs a subnav link in sections of the main menu that allows the export of products and other catalog information. Typically these are added on install of the application. However, these might have been done manually by a developer and need to be copied to a new sandbox. In the event that these need to be manually copied to the sandbox, follow the below steps.

1. On the tenant that the entities are being copied from, run the following API call.

```
GET /api/platform/entitylists/subnavlinks@mozu/entities
```

2. It will return the following response:

```
{
  "startIndex": 0,
  "pageSize": 10,
  "pageCount": 3,
  "totalCount": 27,
  "items": [
    {
      "path": [
        "Custom"
      ],
      "href": "https://example.com/productEdit",
      "appld": "1156edef31d248aab1b9fe0a78d9d43b",
      "windowTitle": "Custom Title",
      "modalWindowTitle": "Custom Title",
      "location": "productsedit",
      "displayMode": "modal",
      "badgeInitials": "CT",
      "requiredContext": "products"
    },
    ...
  ]
}
```

3. For each of the entries in the items being copied over, run another call to the following

endpoint:

```
POST /api/platform/entitylists/subnavlinks@mozu/entities
```

The request body should contain the payload of items from the items array in the first call's response:

```
{
  "path": [
    "Custom"
  ],
  "href": "https://example.com/productEdit",
  "appId": "1156edef31d248aab1b9fe0a78d9d43b",
  "windowTitle": "Custom Title",
  "modalWindowTitle": "Custom Title",
  "location": "productsedit",
  "displayMode": "modal",
  "badgeInitials": "CT",
  "requiredContext": "products"
}
```

4. Then the subnavlinks entry will be added to the next tenant.
5. Refresh the page to see the new entry on the page.

If the entities are installed to the products menu (where *location* = *productsmenu*), then a hard refresh will need to be performed in order for the additions to be displayed. Other locations, such as *location* = *categoriesedit* or *productsedit* will show up after a single refresh.

View a Sandbox

To view an existing sandbox:

1. Log in to Dev Center.
2. Click **Sandboxes**.
3. Locate your sandbox in the grid, right-click it, and select **View**.
4. If prompted, log in to Admin.

Viewing a sandbox opens an instance of Admin. For theme development, go to the **Main > Content > Themes** page of the Admin UI to apply and preview your theme. For application development, go to the menu item associated with your application's function.



Newly created sites in sandboxes may take up to 30 minutes before the cache refreshes and the sites are available for viewing and configuration.

Set up Sandbox as a Golden Sandbox

Golden sandboxes are sandboxes that cannot be archived or deleted even if no user accesses it for a long time. This is useful for maintaining active sandboxes that you can use as a template for cloning new sandboxes. Currently sandboxes are not being automatically archived/deleted, but

this feature is being added to support that functionality in the future.

To set up a sandbox as a golden sandbox:

1. Log in to Dev Center.
2. Click **Sandboxes**.
3. Locate your sandbox in the grid, right-click it, and select **Edit**.
4. Select the **Details** tab.
5. Under the Sandbox Users table, select the **Set as Golden Sandbox** checkbox.

You can check whether a sandbox is a golden sandbox on the Sandboxes tab in Dev Center. Golden sandboxes will have a flag icon in the unnamed column on the left side of the grid.

Clone Production to Sandbox

If you wish to clone a production environment to a sandbox to test changes, you can use the Import/Export application to extract the data and populate an empty sandbox.

1. Create a new sandbox from a blank template.
2. After the sandbox is created, go to Catalog/sites and match the names/structure with the production tenant setup.
3. Install the Import/Export application on the new sandbox.
4. Go to **System > Applications > Import/Export Application 2.0** and enable the application.
5. Refresh the page and verify that you can see the Import/Export menus under Main.
6. Go to production and export the following data:
 - A. **Main > Catalog > Import/Export**, and export all data.
 - B. **Main > Content > Import/Export**, and export all data.
7. While the export is running on production, go back to the sandbox.
8. Go to **System > Payment Gateways** to configure the test gateways.
9. Go to **System > Payment Types** to configure payment types and third party payments to match with production.
10. Go to **System > General Settings** and enter the General/Email/Storefront/Analytics tools information.
11. Download the exported data from the production tenant (.xls or .zip file, if using csv).
12. Go to **Sandbox**.
13. Go to **Main > Catalog > Import/Export**.
14. Upload the file to start the import process.
15. Depending on the size of data, this could take a while. You can monitor progress by going to the Logs tab.

16. Once the import is done, go to **System > Shipping**.
 - A. Go to **Carrier**. Set fulfillment options, shipping methods, and rates.
 - B. Go to **Product Rules**. Create rules to match with production.
 - C. Go to **Methods**. Match the shipping methods, product fee, and order fee to production.
 - D. Go to **Zones**. Match the zones to production.
17. Install the theme version currently in production from Dev Center.
18. Go to **Main > Content > Import/Export**
 1. Upload the file that was downloaded from the export.
 2. If the Publishing settings for content are set to Staged (under **System > Publishing**):
 - A. Go to **Main > Publishing > Drafts**
 - B. Publish all draft changes for the theme.
19. If there are lot of customer segments in prod that you need to replicate to sandbox:
 - A. Go to **Main > Customers > Import/Export**.
 - B. Export only the customer segments.
 - C. Once the export is done, download the file and import it into the sandbox.

Request a Production Tenant

While you are able to provision your own sandboxes with the instructions above, you cannot create production tenants from Dev Center. Instead, you must submit a request to with the information detailed [in this guide](#).