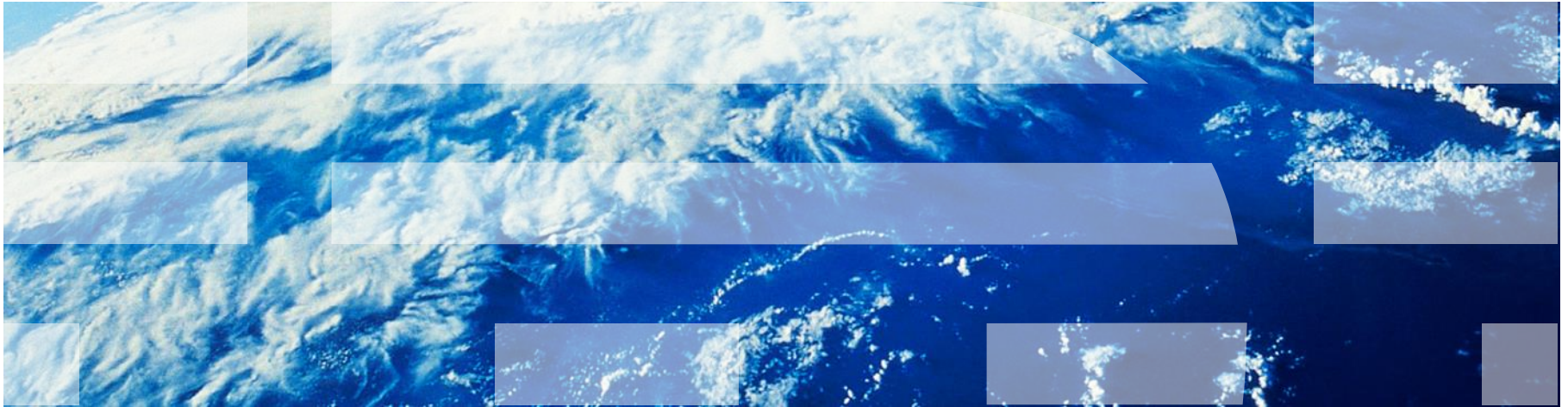

IBM WebSphere Commerce V8.0

Customer Service in Aurora



Agenda

- Solution Overview
- Features
- Architecture
- Troubleshooting
- Adoption
- References

Overview

- WebSphere Commerce (WC) server foundation includes capability that allows a Customer Service Representative (CSR) to act 'on behalf of' a customer.
- This capability is used to enhance store front to allow CSR to serve customers.
- Enable CSR to use Customer facing store front to respond to customer queries relating to online accounts and orders.
- Shared storefront asset ensures any custom extensions developed for shoppers are readily available to CSR also.
- CSR view will be exactly same as shopper view which allows CSR to serve the customers better.

CSR Capabilities

- ✓ Find Customers
- ✓ Find Orders
- ✓ Apply promotions
- ✓ Register new Customer
- ✓ Shop as Guest Customer
- ✓ Reorder
- ✓ Modify Customer Profile – address, personal details
- ✓ Reset password
- ✓ Cancel Order
- ✓ Complete Checkout flow

B2B Store

- ✓ Register buyers
- ✓ Act on-behalf of buyerAdmin to approve buyers, approve orders, create/edit organizations

CSR Find Customers Page



Apparel | Electronics | Grocery | Health | Home & Furnishing | Newsletters & Magazines | All Departments

Search All Departments

Home | Customer Service | Find customers

Customer Service

- CUSTOMER SERVICE
 - Find a Customer
 - Find an Order
 - Add a Customer
 - Shop as a Guest

Find customers

Search options

Login ID:
 First name:
 Last name:
 Email address:
 Home phone:
 Street address:
 Zip/postal code:
 Country:
 State/province:

Customer	Login ID	Address	Home phone	Email	Actions
Conor Walsh	conor	1 Main Street Dublin Dublin 123456789 Ireland	+353 86 000000	conor.walsh@email.ir	<input type="button" value="⚙️"/> Access customer's account Disable customer's account
Mobile phone +353 86 000000 Currency USD		Nickname conor Birthdate 1992-09-06			
Conor Walsh	conrolwalsh	12 Baker Street Liverpool Merseyside L6G 1 C7k United Kingdom		conor.walsh@email.co.uk	<input type="button" value="⚙️"/>

CSR – Find Orders Page



1-800-555-1234 | Customer Service | Wish List | Store Locator | Language / Currency | My Account | Paul Smith | Quick Links



Apparel | Electronics | Grocery | Health | Home & Furnishing | Newsletters & Magazines | All Departments

Search All Departments

Home | Customer Service | Find orders

Customer Service

CUSTOMER SERVICE

Find a Customer

Find an Order

Add a Customer

Shop as a Guest

Find orders

Search options

Shipping information

Order number <input type="text"/>	Start date MM/DD/YYYY <input type="text"/>	End date MM/DD/YYYY <input type="text"/>
First name steve <input type="text"/>	Last name <input type="text"/>	Street address <input type="text"/>
Country Please select <input type="text"/>	State/province: <input type="text"/>	City <input type="text"/>
Zip/postal code <input type="text"/>	Home phone <input type="text"/>	Email address <input type="text"/>

Order number	Order date	Ship to	Home phone	Email	Actions
18001	November 16, 2015	Smith, Steve 8200, Warden Avenue Markham Ontario 82008200 Canada		stevesmith@old.email.com	<ul style="list-style-type: none"> Access customer's account Enable customer's account Lock order

Login ID	steve	Email	stevesmith@old.email.com
Mobile phone		Language	United States English
Currency	USD	Birthday	1992-04-07

CSR – Accessing account of shopper



1-800-555-1234

Customer Service

Wish List

Store Locator

Language / Currency

My Account

Paul Smith (Conor Walsh)

Quick Links



Apparel

Electronics

Grocery

Health

Home & Furnishing

Newsletters & Magazines

All Departments

All Departments



Home | My Account

My Account

SETTINGS

Personal Information

Address Book

Quick Checkout Profile

WISH LISTS

Personal Wish List

ORDERS

Order History

Recurring Orders

Subscriptions

COUPONS

Coupons

My Account Summary

Welcome, Conor Walsh

This is your account summary. You can change your personal information and manage the options available for your account.

Personal Information

Name	Conor Walsh
Address	1 Main Street
City	Dublin
E-mail	conor.walsh@email.ir

[Edit](#)

Recent Order History

Order Number	Order Date	Status	Total Price	Actions
17001 Details	November 12, 2015	Order received and ready for processing	\$74.52	Actions

[View all Orders](#)

Recent Recurring Orders

No orders were found.

Paul Smith, Customer Service Representative, is accessing the account of:

Conor Walsh (conor)

[Sign in as Yourself](#)

Sign Out

CSR – Update Personal Information and Reset password



1-800-555-1234 | Customer Service | Wish List | Store Locator | Language / Currency | My Account | Paul Smith (Conor Walsh) | Quick Links



Apparel | Electronics | Grocery | Health | Home & Furnishing | Newsletters & Magazines | All Departments

Search | All Departments

Home | My Account | Personal Information

My Account

SETTINGS

Personal Information

Address Book

Quick Checkout Profile

WISH LISTS

Personal Wish List

ORDERS

Order History

Recurring Orders

Subscriptions

COUPONS

Personal Information

Welcome Back, Conor Walsh! Last login: November 12, 2015 17:26

* denotes required fields

First name:

Last name: *

Street address: *

Street address line 2:

City: *

State/province: *

Country/region: *

ZIP code/postal code: *

Phone number:

Email: *

Reset password

Do you want to continue with resetting customer password?

Ok

Cancel

CSR – Manage Orders

1-800-555-1234 | Customer Service | Wish List | Store Locator | Language / Currency | My Account | Paul Smith (Conor Walsh) | Quick Links



Home & Furnishing

Newsletters & Magazines

All Departments

Search

All Departments



Order History

Order Number	Order Date	Status	Total Price
17001 Details	November 12, 2015	Order received and ready for processing	\$74.52

Actions

- [Re-Order](#)
- [Cancel order](#)

CSR – Shopping cart view



1-800-555-1234 | Customer Service | Wish List | Store Locator | Language / Currency | M

Apparel

Electronics

Grocery

Health

Home & Furnishing

Newsletters & Magazines

All Departments

Search

SAVE 10% on all Orders over 80 USD Only for Registered Customers

Free


Shopping Cart

When you are finished making changes, click Check Out, or click Unlock to hand over cart back to shopper.

Unlock

Shop Online Pick Up at Store

Schedule this order as a recurring order

Product	Availability	QTY	Each	Total
 <p>Leaf Lettuce SKU:GVE034_340201</p> <p>Move to Wish List </p> <p> Remove</p>	In Stock	1	\$0.89	\$0.89

CSR – Lock / Unlock view in MiniCart

1-800-555-1234

Customer Service

Wish List

Store Locator

Language / Currency

My Account

Paul Smith (Conor Walsh)

Quick Links



Health

Home & Furnishing

Newsletters & Magazines

All Departments

Search

over 80 USD Only for Registered Customers


Free Ground Shipping

COLORS OF SUMMER

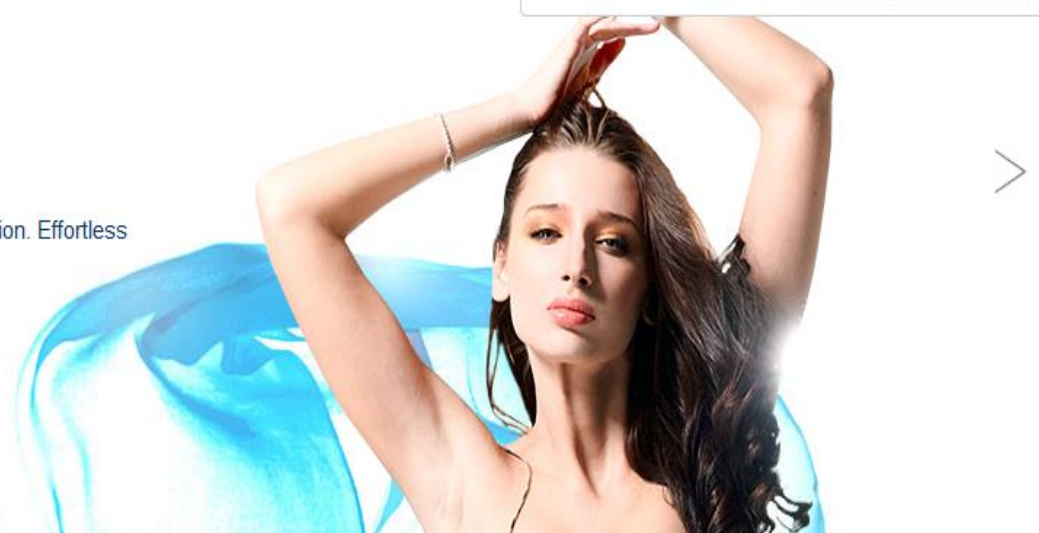
Vivid hues, relaxed shapes, and fluid fabrics dominate our summer dress collection. Effortless style at unbelievable prices.

shop now

Items in your cart: Close

	<p>Leaf Lettuce GVE034_340201 QTY: 1</p>	\$0.89
Subtotal for 1 item(s)		\$0.89

Lock
Go to Cart



CSR – Shopping as guest

The screenshot shows the top navigation bar of an e-commerce website. The user is logged in as "Paul Smith (Guest)". A dropdown menu is open, displaying the text "Paul Smith, Customer Service Representative, is shopping as a guest". The menu contains three options: "Register Guest User" (with a mouse cursor hovering over it), "Sign in as Yourself", and a "Sign Out" button. The background features a promotional banner for "DRESS OF SUMMER" with the text "fabrics dominate our summer dress collection. Effortless" and an image of a woman in a colorful dress.

CSR – Starting customer session / Access customer account

- Uses **forUser** functionality provided by WC foundation framework.
- Execute
<https://hostName/webapp/wcs/stores/servlet/AjaxRunAsUserSetInSession?runAsUserId=8003&storeId=10201>
- This URL is mapped to
`com.ibm.commerce.usermanagement.commands.RunAsUserSetInSessionCmd` in `struts-config-ext.xml`
- Starts forUser session. (Sets forUser id as 8003 in session in the above ex)
- Once forUser is set in session, any action executed by CSR will be executed with forUser identity.

CSR – Terminate forUser session

- Execute

<https://localhost/webapp/wcs/stores/servlet/AjaxRestoreOriginalUserSetInSession?storeId=10201>

- This URL is mapped to

com.ibm.commerce.usermanagement.commands.RestoreOriginalUserSetInSessionCmd
in struts-config-ext.xml

- Restores CSR session and terminates forUser session. Resets forUserId in command context.
- Any action executed by CSR will be executed as CSR identity himself/herself.

CSR – Find Customers

- REST API to find customers (HTTP Method – GET)

<https://hostName/wcs/resources/store/<storeId>/person?q=registeredUsersICanManage&firstName=abc&lastName=xyz>

- Search API supports various profile attributes like firstName, lastName, zipCode, phone, email, state, country, organizationName etc.,

Refer to swagger documentation or info center for full list of search parameters supported.

- By default if number of results returned during search exceeds **20**, error message is displayed asking CSR to refine search criteria.
- To change the default search result threshold, update below environment variable defined in EnvironmentSetup.jspf

```
<c:set var="registeredCustomersResultListSize" value="20" scope="request"/>
```

CSR – Find Orders

- REST API to find orders (HTTP Method – GET)
<https://hostName/wcs/resources/store/<storeId>/order?q=ordersICanWorkonbehalf&firstName=abc&lastName=xyz>
- Search API supports various shipping address attributes like firstName, lastName, zipCode, phone, email, state, country etc.,
 - Refer to swagger documentation or info center for list of search parameters supported.
 - Since payment details are encrypted before saving into DB, searching orders by billing address is NOT supported.
- By default if number of results returned during search exceeds 20, error message is displayed asking CSR to refine search criteria.
- To change the default search result threshold, update below environment variable defined in EnvironmentSetup.jspf

```
<c:set var="findOrdersResultListSize" value="20" scope="request"/>
```


CSR – Update password

- REST API to update password (HTTP Method – POST)
 - When on-behalf session is in progress.

<https://hostName/wcs/resources/store/{storeId}/person/updateMemberPassword?mode=resetPasswordOnBehalf>

- Without starting on-behalf session.

<https://hostName/wcs/resources/store/{storeId}/person/updateMemberPassword?mode=resetPasswordAdmin>

- logonId of shopper is passed in POST body
- As an additional security measure, the API can accept and validate CSR password before resetting shopper password. By default this feature is turned off.
- To enable this feature, set `bypassAdminPassword` property to false in cmdreg table for :

```
interfaceName = 'com.ibm.commerce.security.commands.ResetPasswordAdministratorCmd'
```

CSR – Cancel Order

- REST API to cancel order (Http Method – DELETE)
 - When on-behalf session is in progress.

https://hostName/wcs/resources/store/{storeId}/cart/{orderId}/csr_cancel_order_onbehalf

- Without starting on-behalf session.

http://hostName/wcs/resources/store/{storeId}/cart/{orderId}/csr_cancel_order

CSR – Lock / Unlock Order

- To avoid concurrent modification of shopping cart by CSR and Shopper, lock/unlock cart feature is used.
 - CSR should lock the cart before modifying it.
 - Shopper will have Read Only access to locked cart.
 - CSR should unlock the cart before handing it over back to shopper.

- REST API to Lock order (Http Method – POST)

<https://hostName/wcs/resources/store/{storeId}/cart/{cartId}/lock>

- REST API to UnLock order (Http Method – POST)

<https://hostName/wcs/resources/store/{storeId}/cart/{cartId}/unlock>

Cookies

- [WC_OnBehalf_Role_<StoreId>](#)
 - In B2B store, on-behalf session can be started by Buyer Administrator or Customer Service Representatives. This cookie identifies the role of the user who owns the on-behalf session in store.
 - Valid value for cookie
 - ✓ CSR – Indicates on-behalf session is started by CSR
 - ✓ Empty – Indicates on-behalf session is started by Buyer Administrator
 - Store front makes use of this cookie to display appropriate links and pages based on the role of the user.
- [WC_LogonUserId_<StoreId>](#)
 - Logon ID of the user who has logged on to store.
 - Used to display the id in header.
- [WC_BuyOnBehalf_<StoreId>](#)
 - Logon ID of the shopper for whom on-behalf session is started.
 - Used to display the on-behalf message in header panel.

Troubleshooting

- Customer Service Link not visible in Store Front
 - Check if CSR feature is enabled for the store in management center
 - Check if user has appropriate roles – CSR / CSS + Registered Customer role

Store Properties Styles **Configurations**

Select optional integrations and functions to enable for

- Facebook integration
- Store locator
- Buy online and pickup in store
- Wish lists
- Recurring orders
- Use synonyms
- IBM Customer Service for WebSphere Commerce

Enable customer service representative to act on behalf of shopper.
- Subscriptions

Organization Administration Console

Access Management Approvals Help

Logout > Home > Create User > Roles

Roles

To add a role, select an organization and a role for the user, and then click **Add**. When you have added all roles, click **OK**.

Total organizations currently showing: 13

Select organization

Extended Sites Seller OrganizationAuroraESite (Extended Sites Seller Organization)

Extended Sites Seller Organization (Root Organization)
 Extended Sites Seller OrganizationAuroraB2BESite (Extended Sites Seller Organization)
Extended Sites Seller OrganizationAuroraESite (Extended Sites Seller Organization)
 Root Organization (Root Organization)

Search for organizations

Match case, beginning with ▼

Find Organization

Role

Account Representative ▼

Add

Selected roles

Registered Customer - Extended Sites Seller OrganizationAuroraESite (Extended Sites Seller Organization)

Customer Service Representative - Extended Sites Seller OrganizationAuroraESite (Extended Sites Seller Organization)

Remove

Troubleshooting

- Access Control error when CSR performs action on-behalf of shopper.
 - Make sure that shopper has access to execute the action.
 - Make sure that the action is added to `BecomeUserCmdsResourceGroup` resource group. This allows CSR to execute the action on-behalf of shopper.
 - Check access control setup for 'OnBehalfCSROrderCancelCmd' command defined in `OrderAccessControlPolicies.xml` as reference while implementing access control for any new actions.
 - Check `BecomeUserCustomerServiceGroupExecutesBecomeUserCmdsResourceGroup` policy to view existing access control setup for CSR actions

Adoption

- Additional REST APIs are provided to enable CSR feature.
- Leverages existing customer facing store front to add additional CSR functionality.
- At a high level following delta changes are required at the store front to enable CSR feature:
 - New customer service landing page to allow CSR to find customers / find orders.
 - Action buttons to access customer accounts, enable / disable customer account, reset password.
 - Update order history page to allow Order Cancelation.
 - Update miniCart and shopping cart pages to add lock / unlock actions for order.
 - Header changes to display on-behalf session info.
 - Access control changes to any existing custom actions to allow CSR to execute the action on-behalf of shopper.

References

- IBM Customer Service for WebSphere Commerce
 - http://www-01.ibm.com/support/knowledgecenter/SSZLC2_8.0.0/com.ibm.commerce.aurora-starterstore.doc/refs/rsmcustservflows.htm
- Buy-on-behalf-of flows (B2B)
 - http://www-01.ibm.com/support/knowledgecenter/SSZLC2_8.0.0/com.ibm.commerce.aurora-starterstore.doc/refs/rsmaurorasa_b2bbobo.htm
- Enabling IBM Customer Service for WebSphere Commerce
 - http://www-01.ibm.com/support/knowledgecenter/SSZLC2_8.0.0/com.ibm.commerce.admin.doc/tasks/tsmibmcse-nable.htm
- Granting user roles for IBM Customer Service for WebSphere Commerce
 - http://www-01.ibm.com/support/knowledgecenter/SSZLC2_8.0.0/com.ibm.commerce.admin.doc/tasks/tsmibmcsr-oles.htm
- List of Cookies and its usage
 - http://www-01.ibm.com/support/knowledgecenter/SSZLC2_8.0.0/com.ibm.commerce.admin.doc/concepts/cse_co-okies.htm

Other sessions related to WC V8 and Commerce Insights

Date	Time	Session	Topics	Speaker(s)
Mon 30 Nov	10:00-12:00 ET	Overview	Overview session, covering all that is new in WC V8 and CI	Nicolai Nielsen
Tue 01 Dec	10:00-12:00 ET	Commerce Insights	Functionality and on-boarding for Commerce Insights	Katherine Langdon Karson Ng Daisy Tan
Wed 02 Dec	10:00-12:00 ET	Management Center	New framework and UI for IBM Management Center	Bruce Baker Judy Chan
Thu 03 Dec	10:00-12:00 ET	Stack Changes	Changes in the stack, licensing, and removed features in WC V8	Nicolai Nielsen
Fri 04 Dec	10:00-12:00 ET	Migration	Migration approach and tooling in WC V8	Nicolai Nielsen
Mon 07 Dec	10:00-12:00 ET	Customer Service	Overview of the new Aurora Customer Service tools	Guru Shamanna Karson Ng
Tue 08 Dec	10:00-11:00 ET	Social Commerce Accelerators	Coverage for the Social Commerce Accelerators (note: not V8-specific)	Nicolai Nielsen
Tue 08 Dec	11:00-12:00 ET	New Maintenance Strategy		Nicolai Nielsen

Thank You!

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