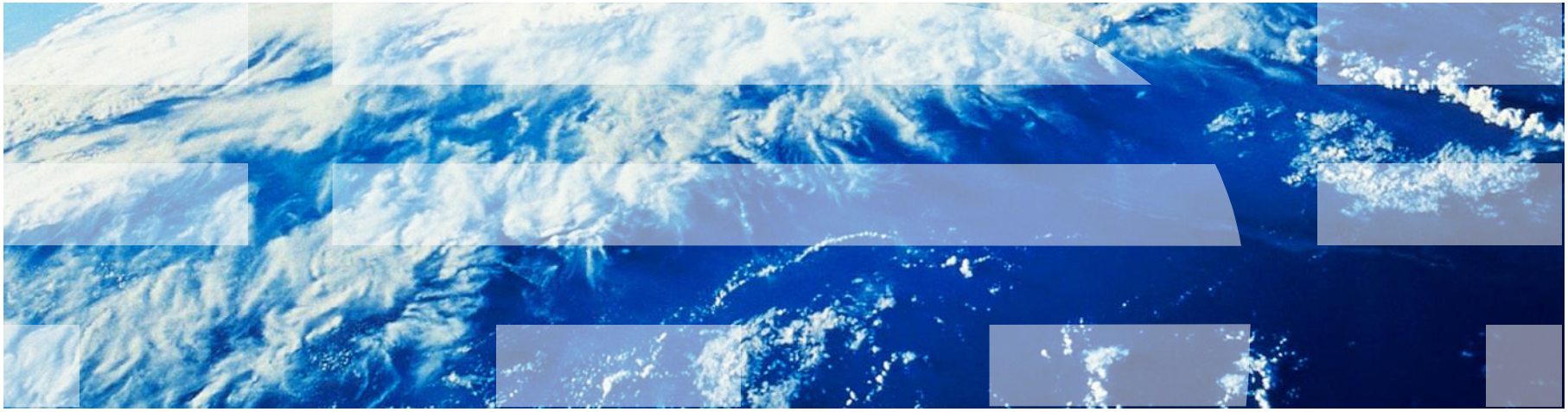
IBM WebSphere Commerce V8.0

Customer Service in Aurora



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Agenda

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

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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.

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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

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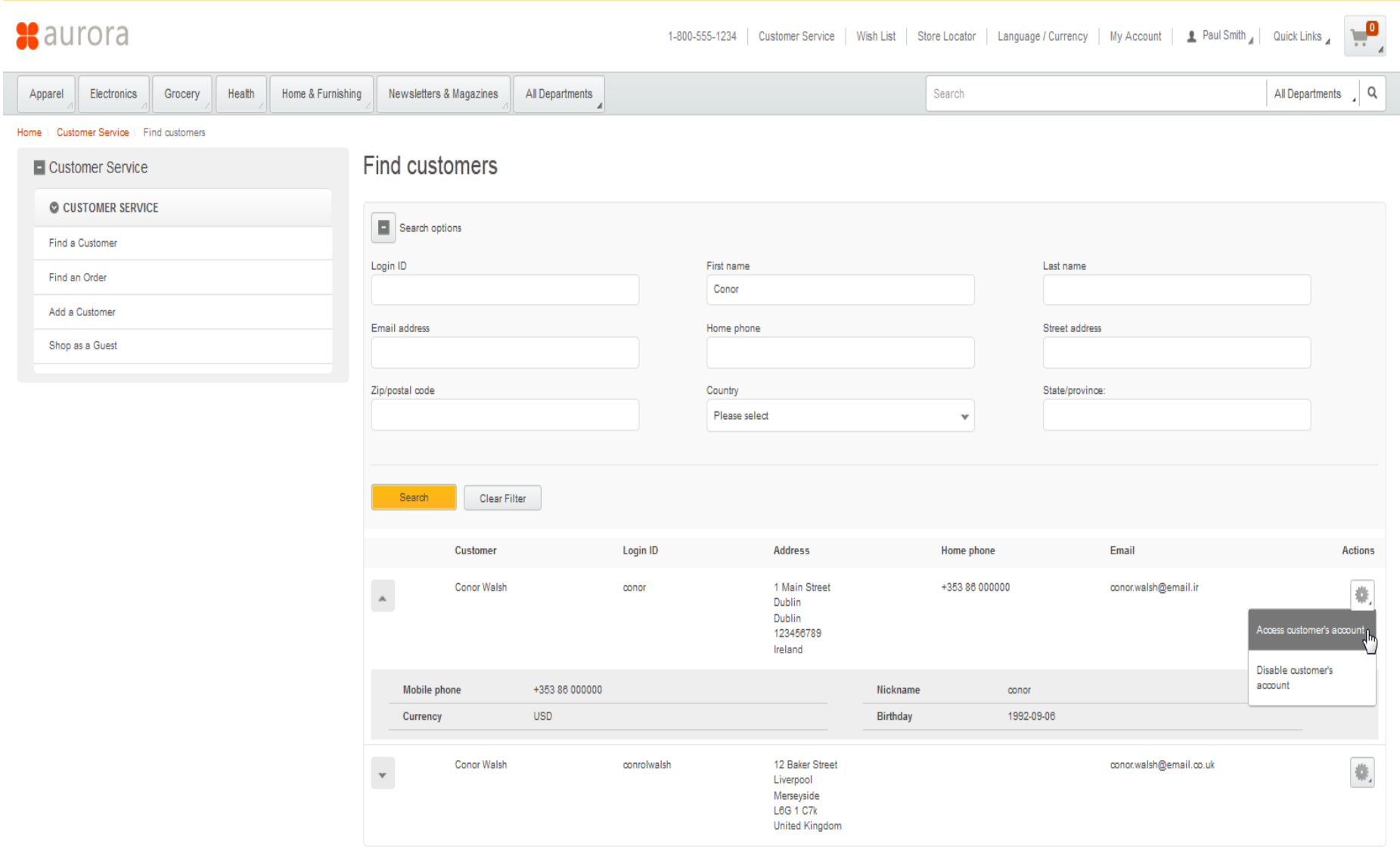
CSR Find Customers Page



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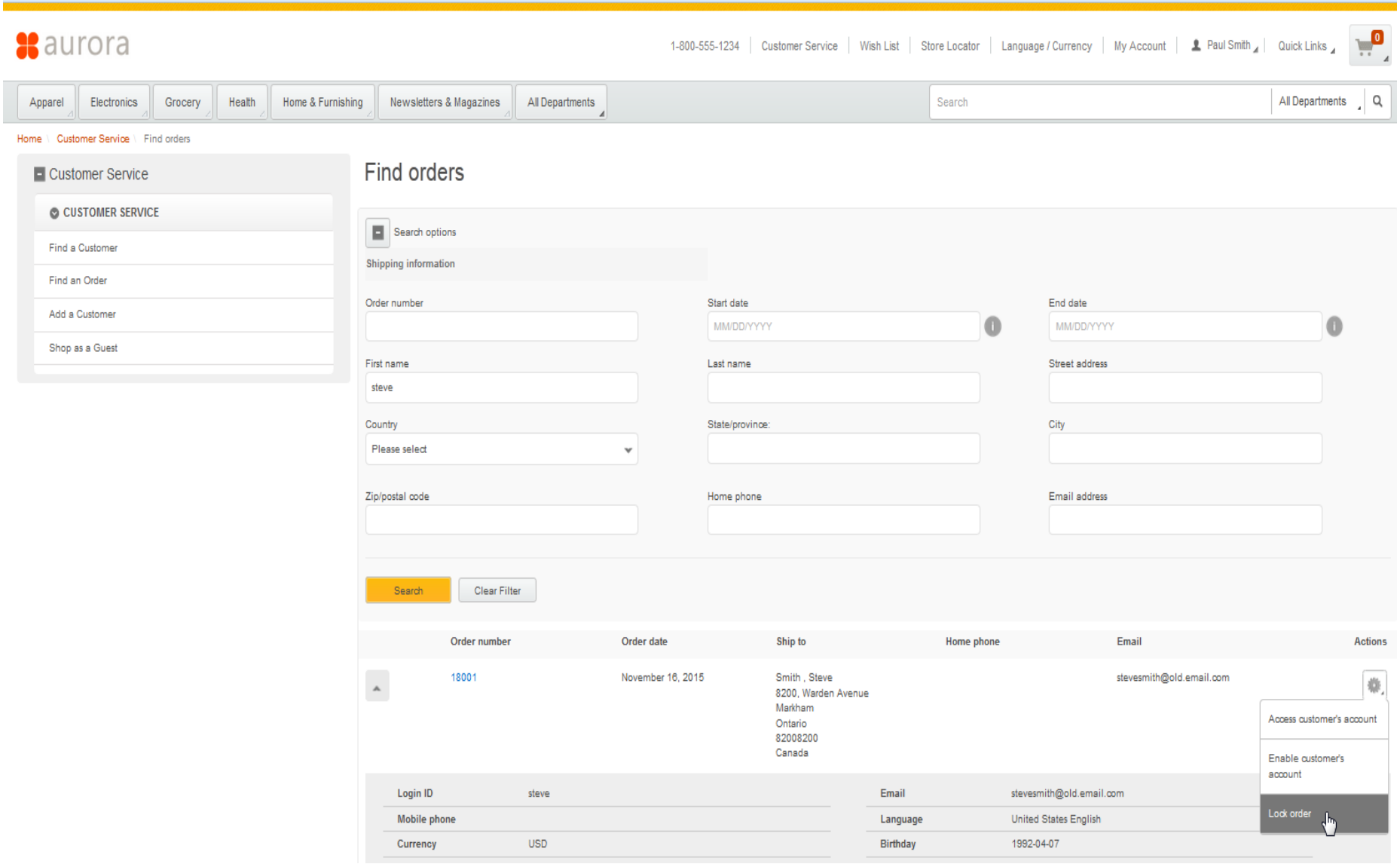
CSR – Find Orders Page



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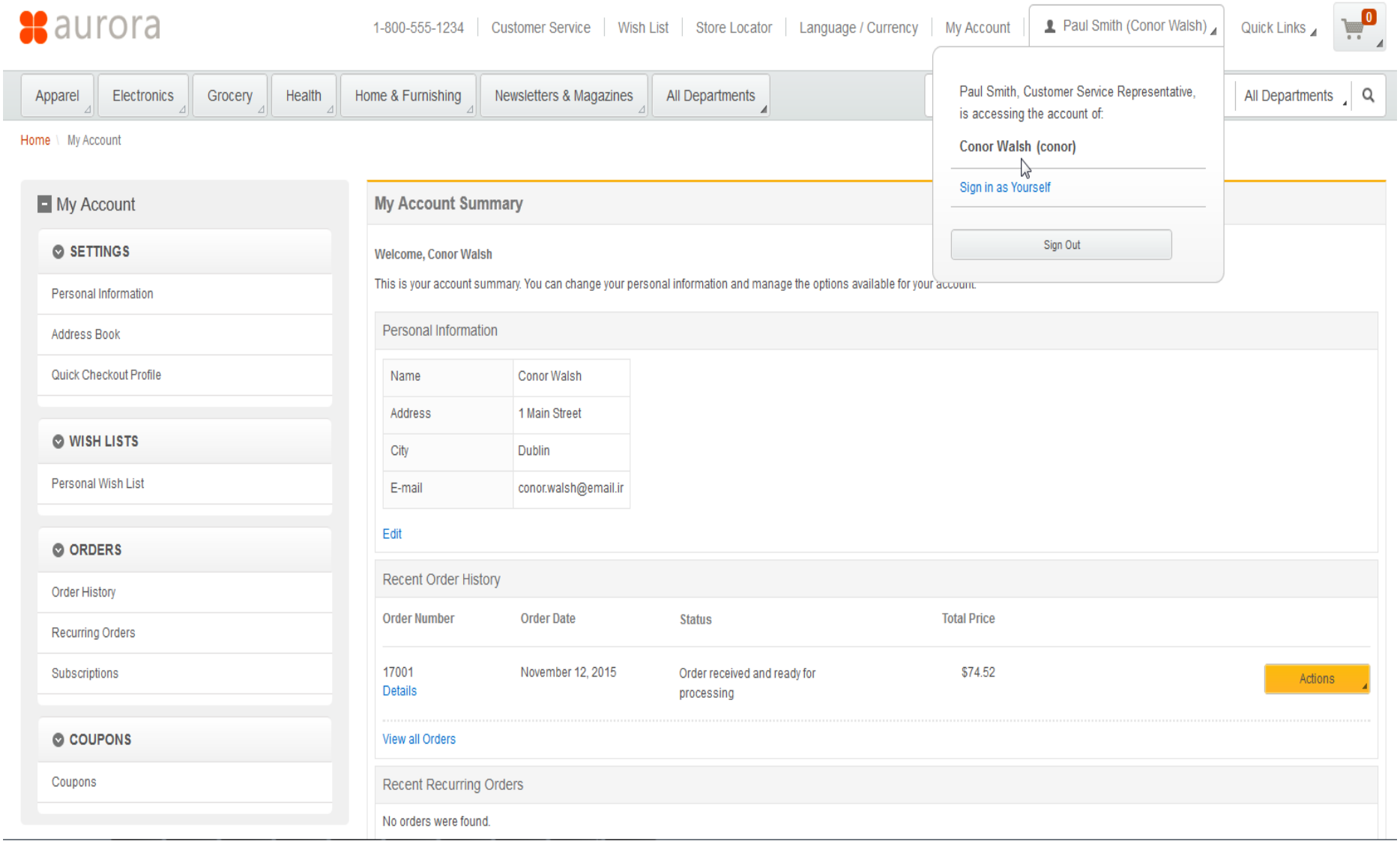
CSR – Accessing account of shopper



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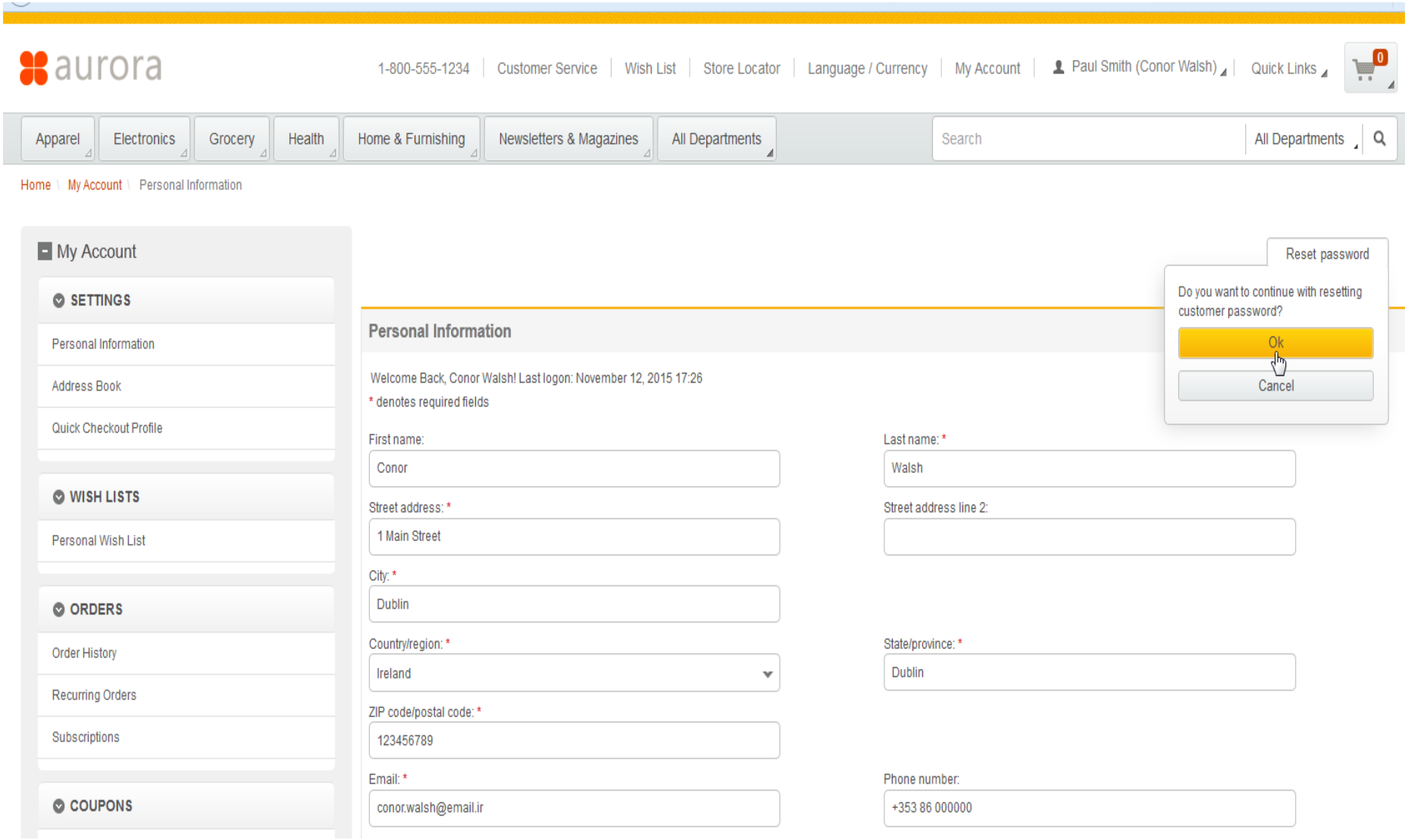
CSR – Update Personal Information and Reset password



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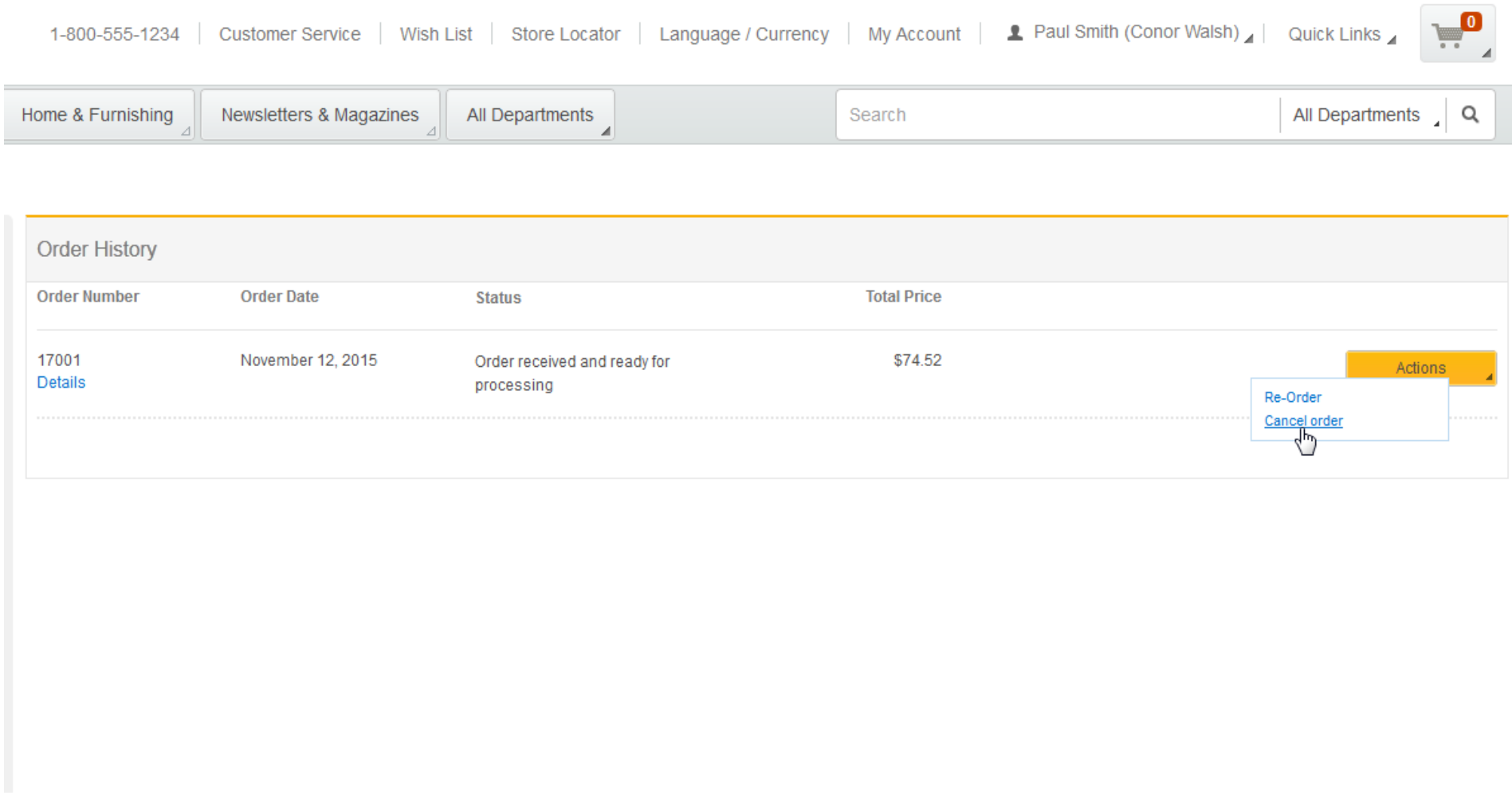
CSR – Manage Orders



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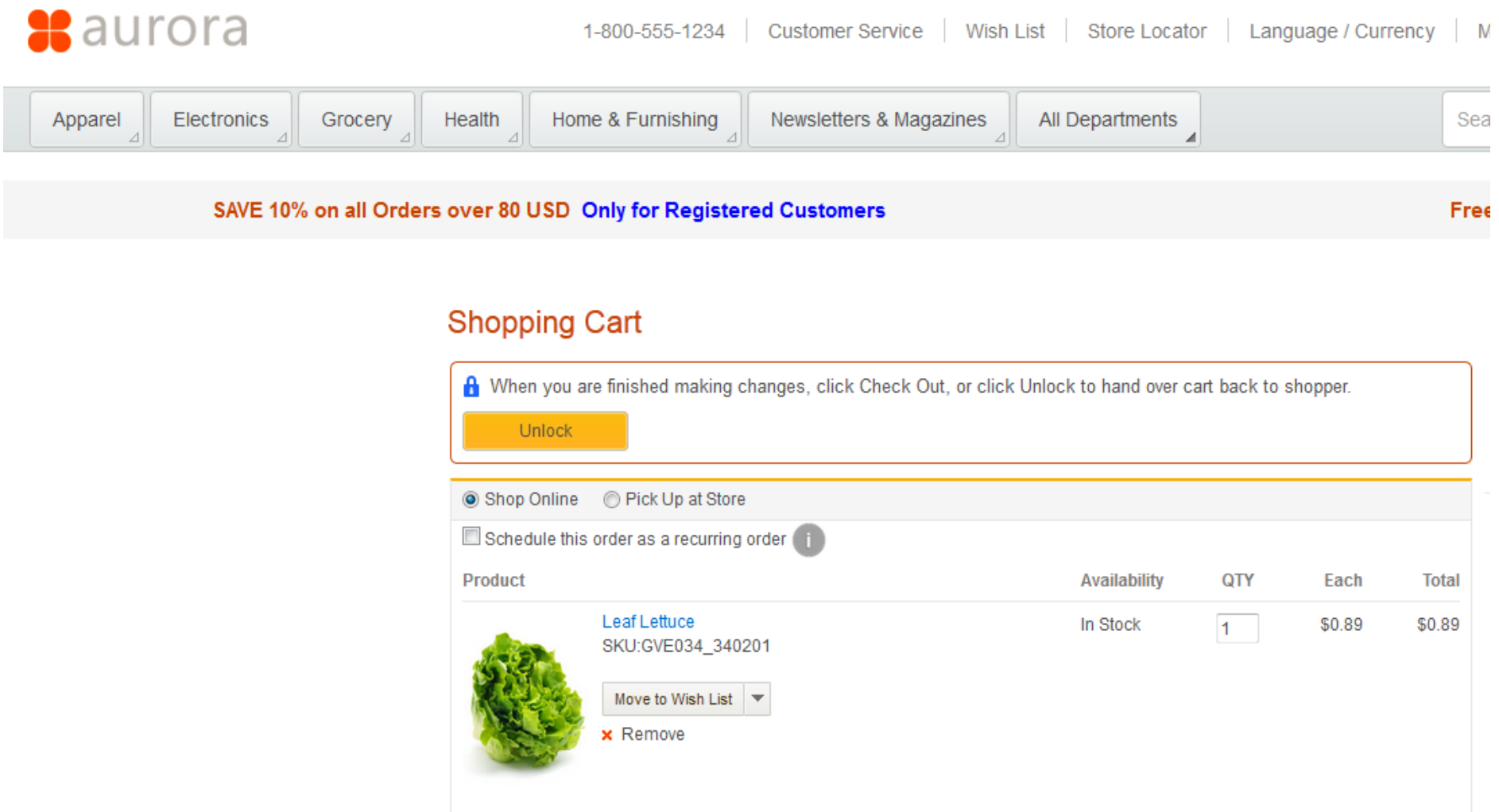
CSR – Shopping cart view



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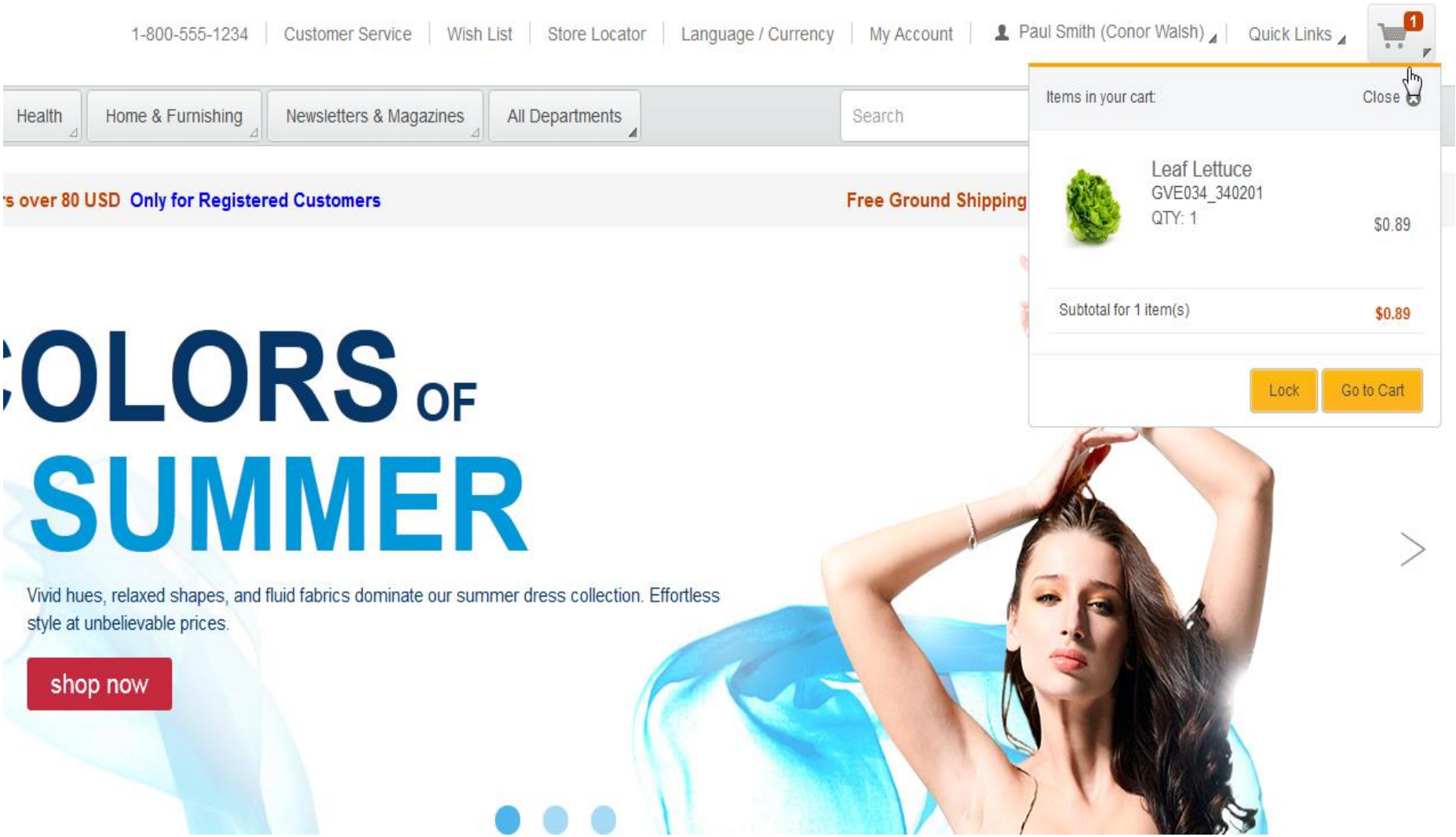
CSR – Lock / Unlock view in MiniCart



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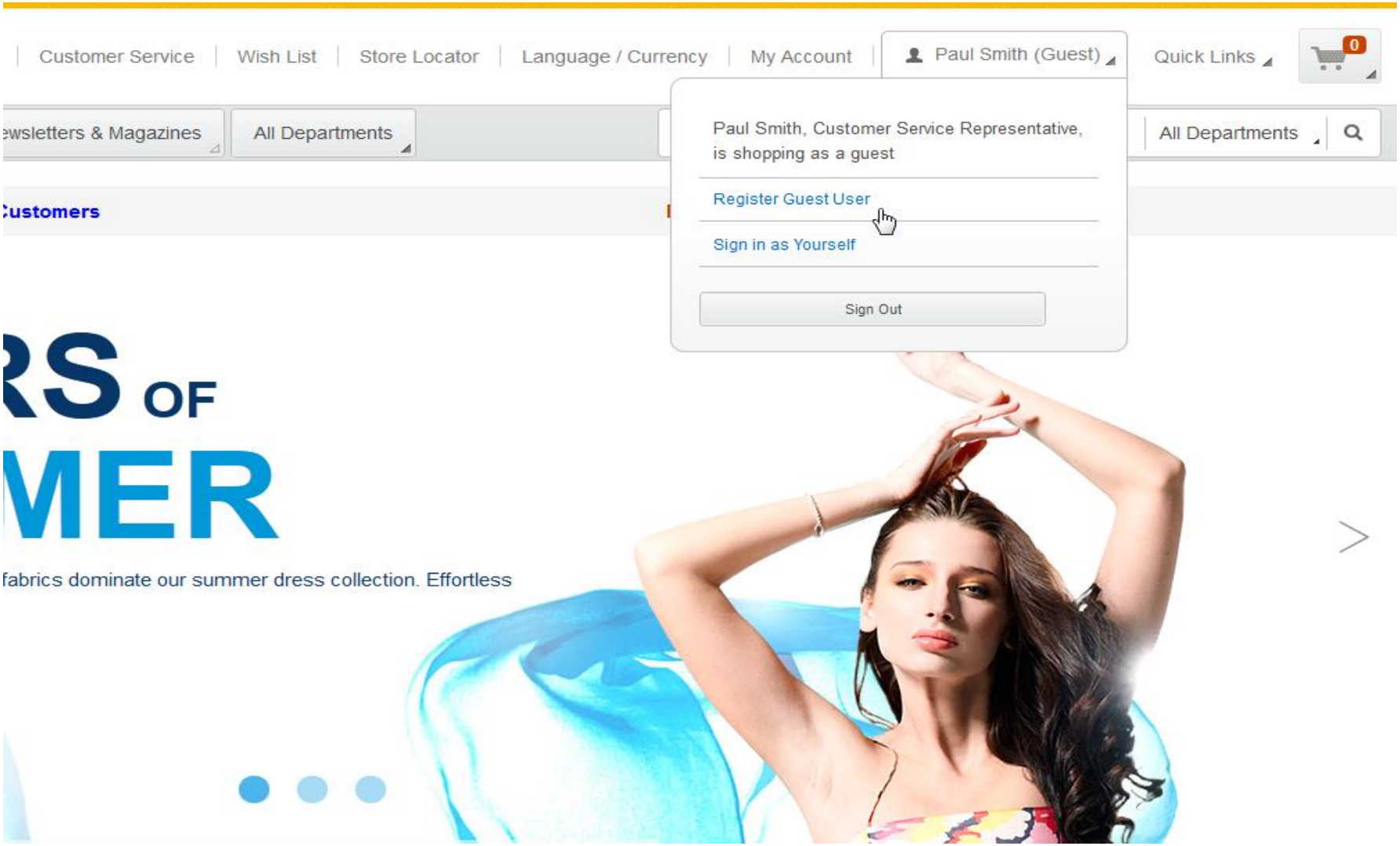
CSR – Shopping as guest



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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.

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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.

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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"/>
```


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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"/>
```


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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'
```


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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}/csrcancel_order_onbehalf

  - Without starting on-behalf session.

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

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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

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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.

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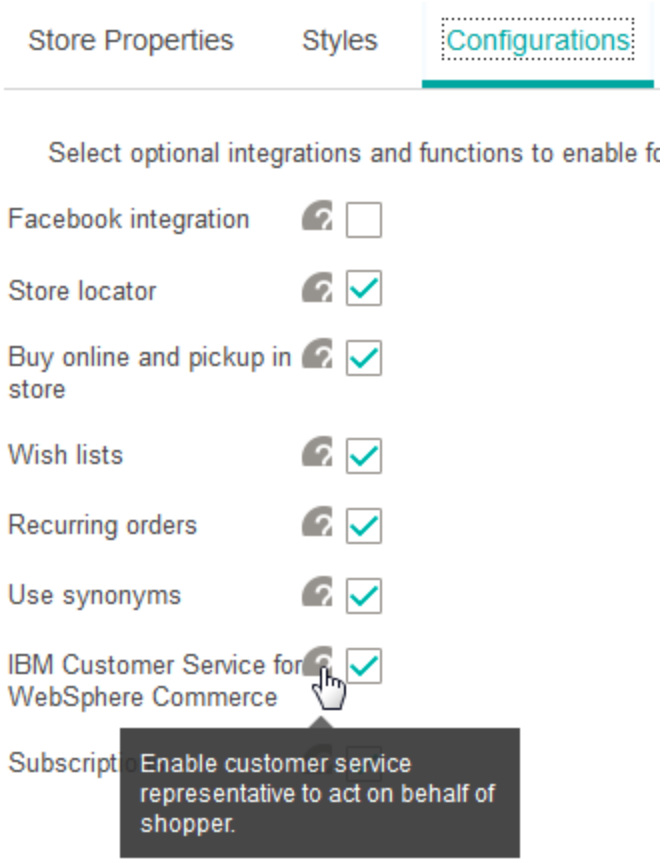
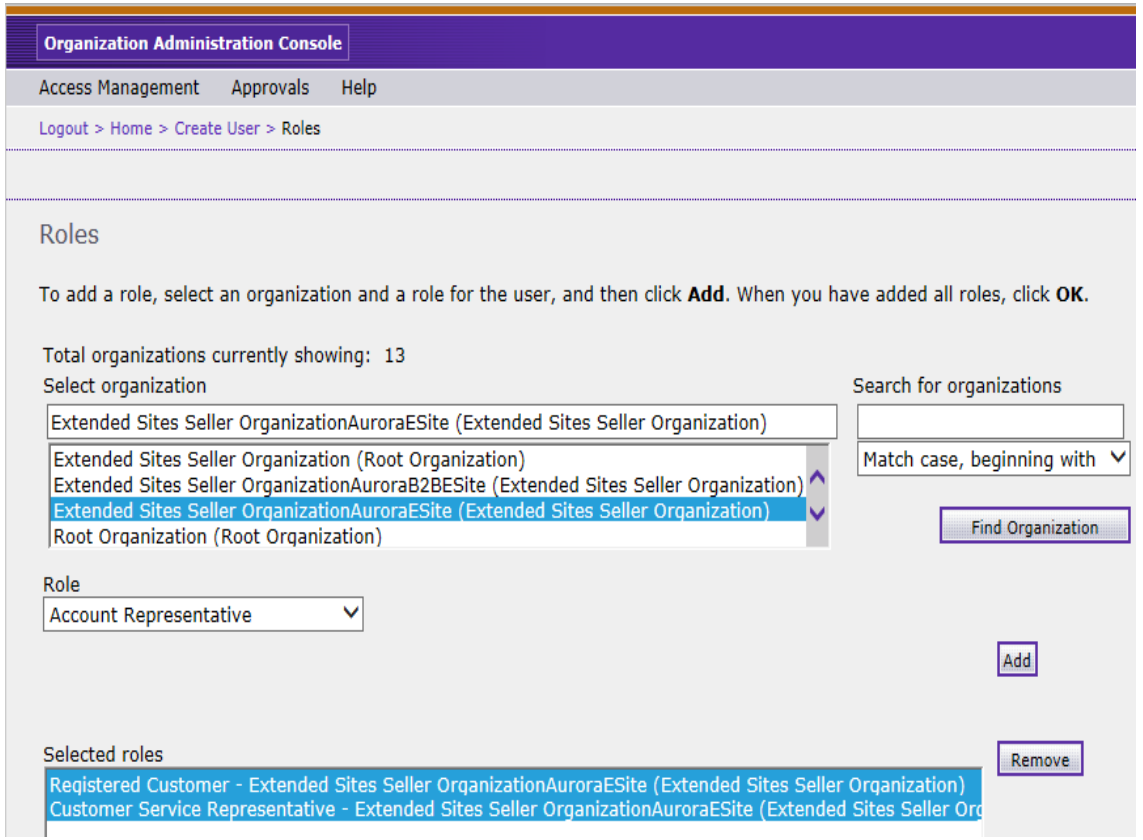
Troubleshooting

- 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





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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

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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.

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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
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- Enabling IBM Customer Service for WebSphere Commerce
  - http://www-01.ibm.com/support/knowledgecenter/SSZLC2_8.0.0/com.ibm.commerce.admin.doc/tasks/tsmibmcsenable.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/tsmibmcsroles.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_cookies.htm

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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

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