Sitecore E-Commerce Fundamental Edition 1.1

Sitecore E-Commerce Cookbook

A marketer's guide to the Sitecore E-Commerce Fundamental Edition

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Chapter 1

Introduction

The Sitecore E-Commerce Fundamental Edition (SEFE) is a fully functional webshop product that allows you to rapidly develop and deploy an end-to-end e-commerce solution.

This manual describes how marketer's and webshop managers can manage their product catalog and organize the way in which products are displayed in their webshop.

The topics covered include managing your product catalog, creating and editing product categories, specifying how the products should be displayed in the webshop, tracking orders, managing campaigns, and analyzing the traffic on the webshop.

In this manual, we use a very basic sample webshop that sells photographic equipment to illustrate the functionality in Sitecore E-Commerce Fundamental Edition. This sample site consists of just a few simple pages.

This manual contains the following chapters:

- **Chapter 1 — Introduction**
  This is a brief description of the manual, its aims, and its intended audience.

- **Chapter 2 — Managing the Product Portfolio**
  This chapter describes how to manage, describe, and categorize the products in a webshop.

- **Chapter 3 — Displaying Products**
  This chapter describes how to use Layouts to display products in a webshop.

- **Chapter 4 — Shopping, Orders, and Customers**
  This chapter explains how to locate customers and orders.

1.1 The Sample Web Shop

The *Sitecore E-Commerce Fundamental Edition Example Pages* package includes a sample webshop with example pages. The sample web shop sells cameras and photography products to demonstrate the key functionality in the Sitecore E-Commerce Fundamental Edition and Sitecore OMS.

This cookbook contains multiple examples that use these sample pages and breaks each task down into smaller steps and procedures. The main principles and tasks a marketer needs to carry out are the same regardless of how your webshop has been implemented. For example, managing products and product information, handling customers and orders, as well as managing OMS functionality are activities fundamental to most Sitecore webshop implementations. So use the examples presented in this cookbook as a guide.

When you install the example pages, an *E-Commerce Examples* node appears in the content tree that contains the sample web pages. The *E-Commerce Examples* node contains all the basic e-commerce functionality that you need to build a webshop.
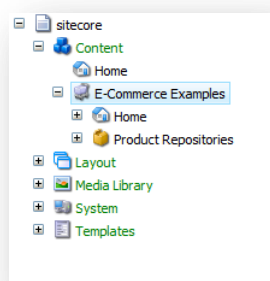
We recommend that you implement your own webshop under the *Home* node and leave the components under the *E-Commerce Examples* node unchanged. You can use the components in *E-Commerce Examples* as a template for the sites that you create.

This cookbook presents one way of implementing Sitecore E-Commerce Fundamental Edition; there are many other ways to achieve the same result. Consider this when reading the instructions and procedures in this document. For example, the checkout procedure shown here is just one way in which you can implement this feature. Remember the Sitecore E-Commerce solution is very flexible and everything is customizable.
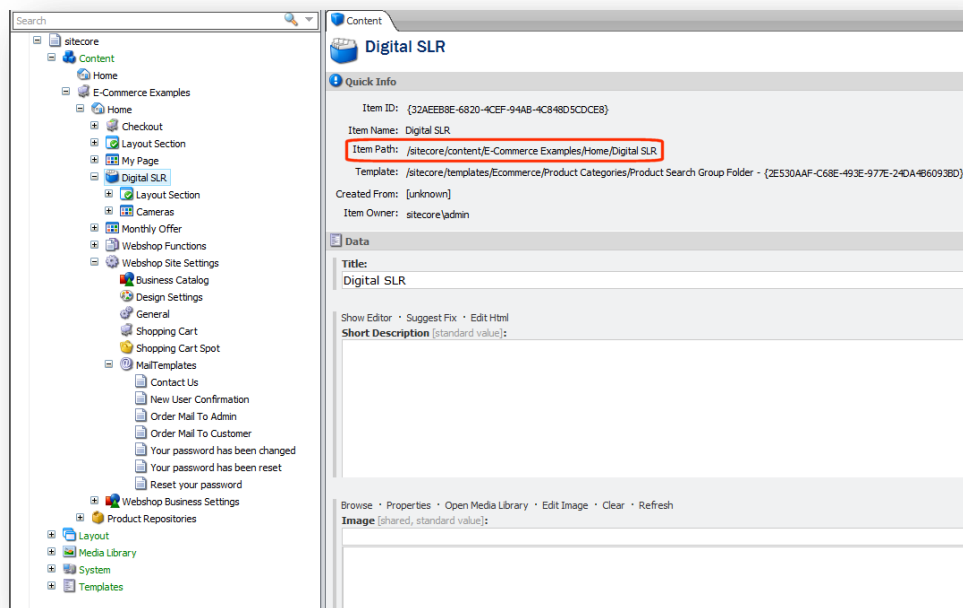
1.1.1 Viewing the Sample Web Pages

The sample web pages contain very little navigation. To view the sample pages, you must enter the URL of each page.

To view the sample web pages:

1. In the **Content Editor**, navigate to item that you want to view, for example, the *Digital SLR* item.

2. In the right-hand pane, expand the **Quick Info** section.

3. In the **Item Path** field, copy the URL.

4. In a new browser window, open the *Home* page and paste the path into the **Address** field after the name of the E-Commerce installation.

For example:
```
http://Myecommerce/sitecore/content/E-Commerce Examples/Home/Digital%20SLR/Cameras
```

1.1.2 The Sitecore E-Commerce Content Tree

A Sitecore website consists of many different items and these items are all stored in the Sitecore content tree.

This tree functions in the same way as the content tree in **Windows Explorer**, except that the items you have access to are determined by the security roles and permissions that you have been assigned in the Sitecore security system.

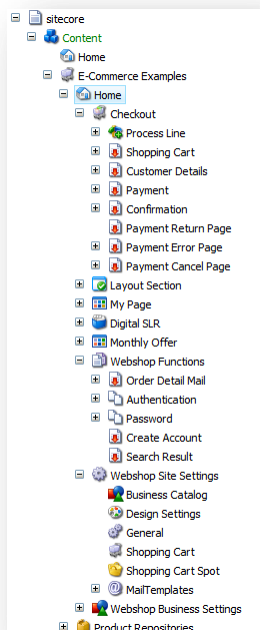Sitecore E-Commerce Fundamental Edition has a specific content tree structure.
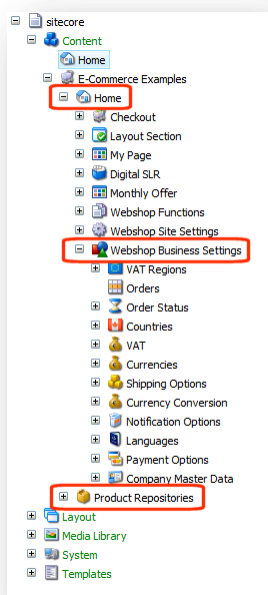
Three of the most important elements in the E-Commerce content tree are:

- Home

- Webshop Business Settings

- Product Repositories

Home

The *Home* node contains all of the items that make up the actual webshop.

This includes the pages that make up the site, the product categories that you display on the site, and the items that determine the layout of the site.

However, some of the other important items in the *Home* node are:

Checkout

This section contains all of the pages and functionality that make up the checkout process. This includes the shopping cart, pages for entering personal information and selecting a payment method, as well as error and order confirmation pages.

My Page

This section contains all of the functionality that is available to webshop customers who create a customer account, such as, the ability to edit their account information, change their password as well as their order history.

Webshop Functions

This section contains the other important functions that a webshop requires, such as, pages for creating a customer account, logging in, resetting a forgotten password, as well as a search results page.

Webshop Site Settings

This section contains items such as Business Catalog, Design Settings and Shopping Cart that link to settings contained in the Webshop Business Settings specific to this installation.

Webshop Business Settings

The *Webshop Business Settings* node contains all of the items that control the business functionality supported by the webshop including the VAT regions, currencies, shipping options, and notification options. This is also where the details of all the orders that customers place on the webshop are stored.

Product Repositories

The *Product Repositories* node contains the items for all of the products that are available on the webshop.

Sitecore recommends that you store the product items in the *Product Repositories* node, although in reality your products items could be located anywhere in the content tree, below the root node of your website.

For more information about configuring Sitecore E-Commerce Fundamental Edition, see the *SEFE Installation and Configuration Guide*.

1.2 Editing Items in Sitecore

Sitecore has two tools that you can use to edit the items displayed on your website:
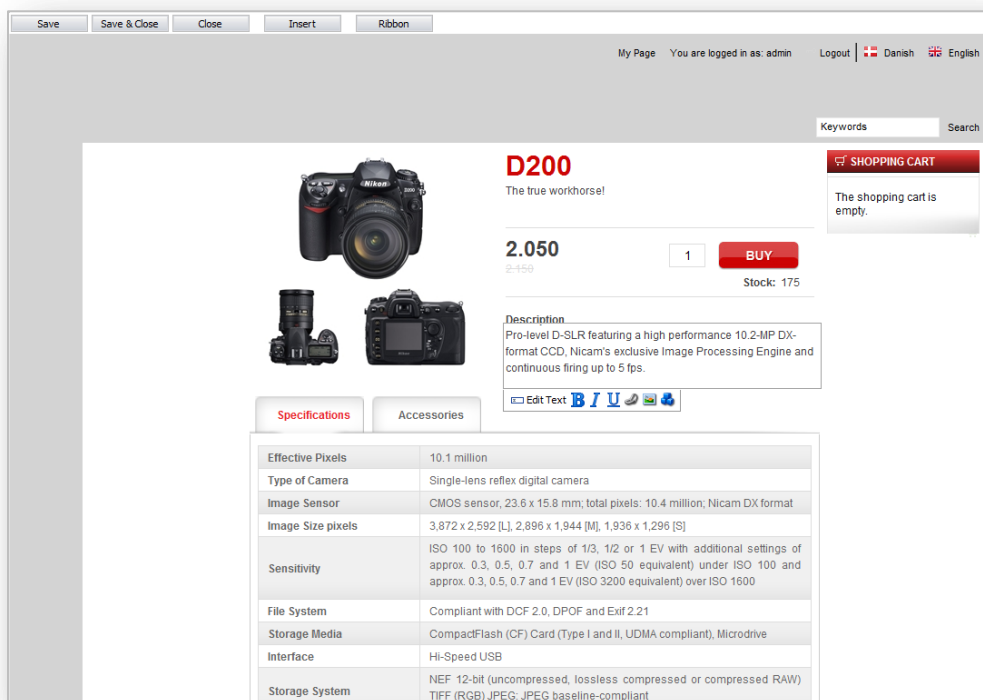
- The Page Editor
- The Content Editor

The Page Editor

This is the simplest of the Sitecore editing tools and lets content editors edit and write content items directly on the page. It is a WYSIWYG editor (what you see is what you get) and limits the amount of functionality that is presented to the user.

When you log in to the Page Editor, the functionality that is available to you can vary depending on the security roles that you have been assigned and the customizations that have been carried out on the website you are accessing.

When you use the Page Editor to edit an item, Sitecore displays a number of editing options for the section of the item that you select:


In the Page Editor, you can edit text, images, and so on. However, the functionality that you have access to in the Page Editor can vary greatly depending on the roles and permissions that you have been assigned in the Sitecore Security system.

The Content Editor

The Content Editor is designed for more experienced content authors. The Content Editor is a large application but both its appearance and the functionality that is available to you can vary depending on the security roles that you have been assigned, the local security settings, and the amount of

customizations that have been carried out on your installation.
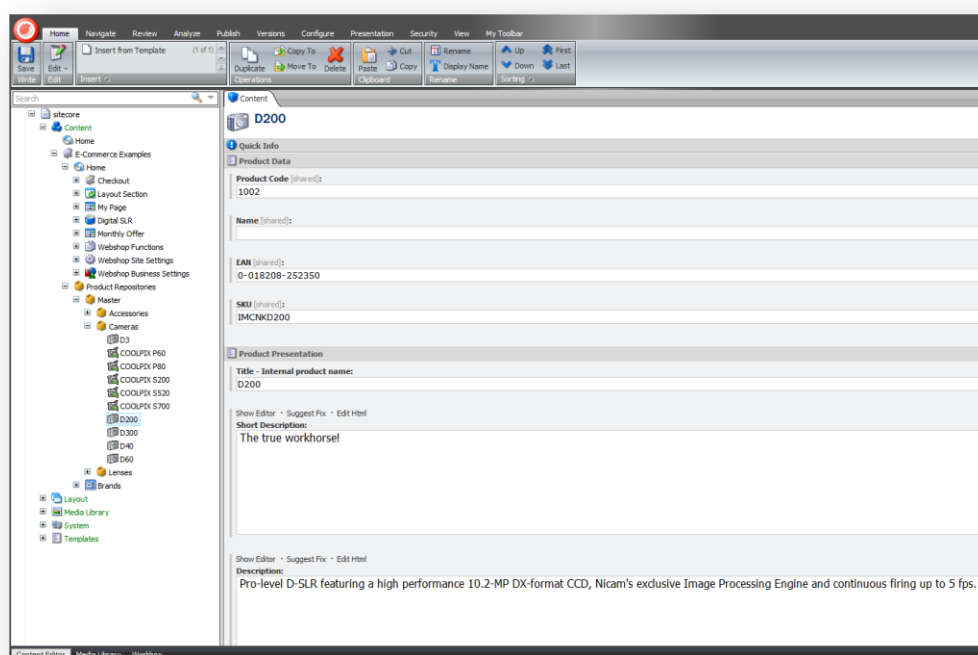
When you log in to the Content Editor, the items that make up your website are presented to you in a very different way than they are in the Page Editor. In the Page Editor, you see items as they appear on the website. In the Content Editor, you see the items as objects in the content tree and when you select an item, it is presented to you as a list of fields that you can edit.

The Content Editor can give you access to all of the items that make up your website as well as all of the functionality that you need to design, edit, and configure it. We therefore use the Content Editor to perform all of the tasks described in this manual.

To learn more about the Page Editor and the Content Editor, see the *Content Author's Cookbook*.

Chapter 2

Managing the Product Portfolio

This chapter describes how to add products to Sitecore E-Commerce Fundamental Edition. You learn how to store the product information in Sitecore, as well as, how to categorize your products for display in a webshop, and how to edit the specification of individual products.

This chapter contains the following sections:

- Product Information Management

- Creating a Product Category

- Adding Products to a Category

- Editing a Product Item

2.1　Product Information Management

Product Information Management or PIM refers to the processes and technologies that you use to manage the information about your products.

The Sitecore E-Commerce solution stores product information as items in the Sitecore content tree. You can add products manually or you can integrate the E-Commerce module with a back-end ERP system or data warehouse.

If you use a back-end system to manage your products, the way in which you add products depends largely on which back-end system you use. Explaining this integration is beyond the scope of this manual.

For more information about how to integrate Sitecore E-Commerce Fundamental Edition with your ERP system or data warehouse, consult you Sitecore partner.

2.1.1　Organizing Product Categories and Items

We recommend that you store the product information for all of the products that you want to sell on your webshop in the *Product Repositories* node. The *Product Repositories* node must contain a Sitecore item for each product that you add. You can store all the product items in the *Product Repositories* folder or you can create a folder structure below the *Product Repositories* node.

One approach would be to create a logical folder structure that reflects the structure of your back-end ERP system. However, the E-Commerce solution is flexible enough to allow you to store the product items in a structure that suits your particular requirements.

Each product item contains all of the information about that particular product — specifications, price availability, and so on. This information can be stored in your data warehouse and copied from there to the product items in Sitecore or you can enter the product information directly into the product items in Sitecore. Once again, this depends on how you implement your Sitecore installation.

After you have imported all of the product information into Sitecore, you can decide how you want to display the products on your webshop. You can create the pages that you will use on your webshop to display your products. You can design the pages as product categories for the product items that are displayed on the webshop and you can edit the individual product items to change the information that is displayed.

In the *E-Commerce Examples* node, if you expand the *Product Repositories* node, you can see that the products have been added to it and that an item has been created for each product. The products

have been divided into three categories — Accessories, Cameras, and Lenses.
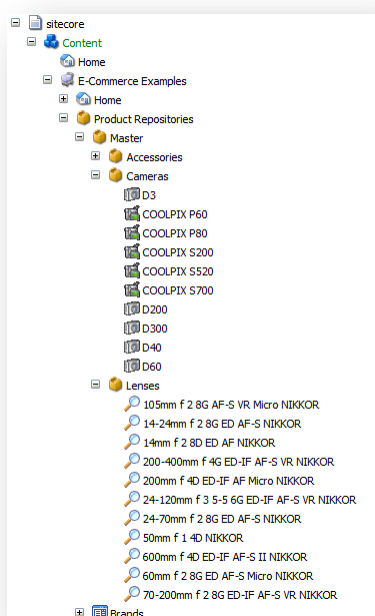
The *Product Repositories* node can contain any folder structure. You could replicate the structure of your back-end ERP system or create a completely different structure. Almost any type of configuration is possible.

2.1.2   Adding Products to Pages

On your webshop, you will almost inevitably create a series of pages that reflect the different categories that you have divided your products into and that make sense for your business.

In the sample pages that come with Sitecore E-Commerce Fundamental Edition, there are a number of pages that use different methods to specify which products are displayed on the website.
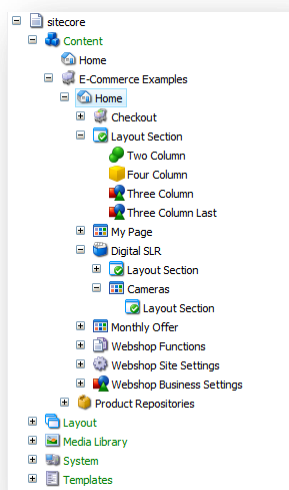
For example, the *Home* page always displays a list of products that are defined in the layout sections that is listed below it, and the *Cameras* page uses a search form to select the products that it displays.

Let's have a closer look at these two pages.

The Home Page

The *Home* page is the first page a customer sees when they visit your webshop.
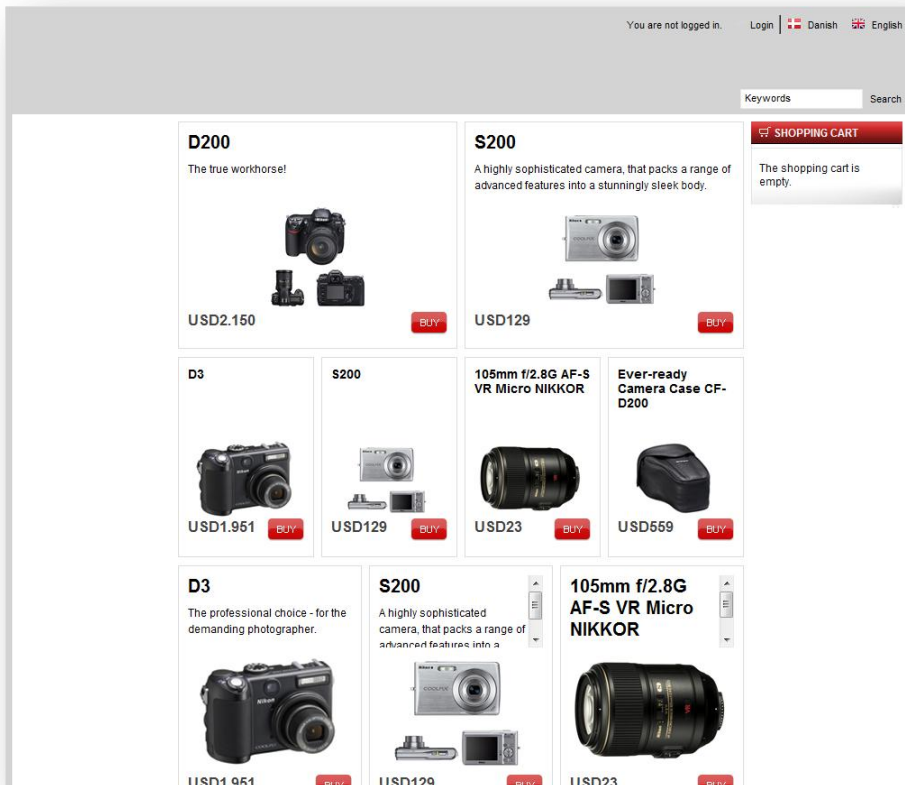
As you can see, it displays a list of products arranged in rows of two, three, and four. This page has been designed to always show this particular list of products in this order.

In the Content Editor, you can see that under the *Home* item is a *Layout Section* that contains a number of subitems.
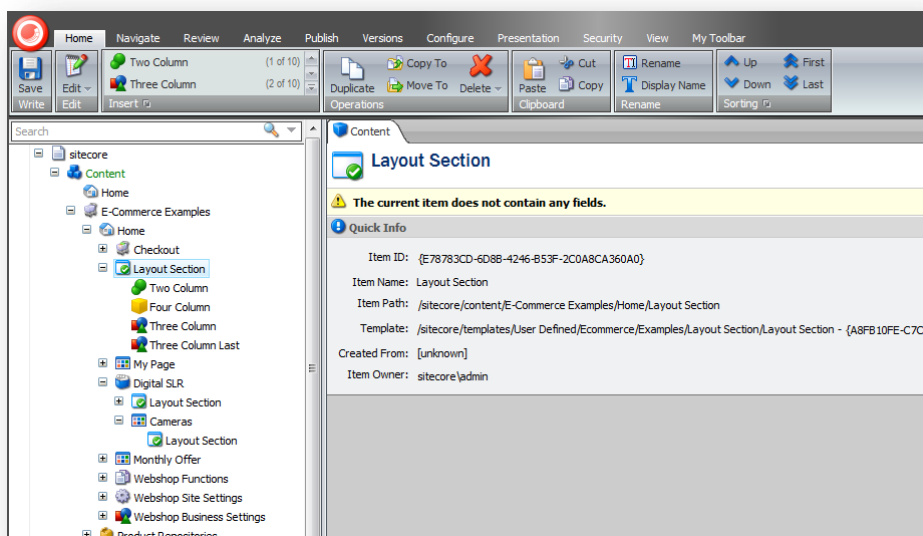
Click the *Two Column* item.
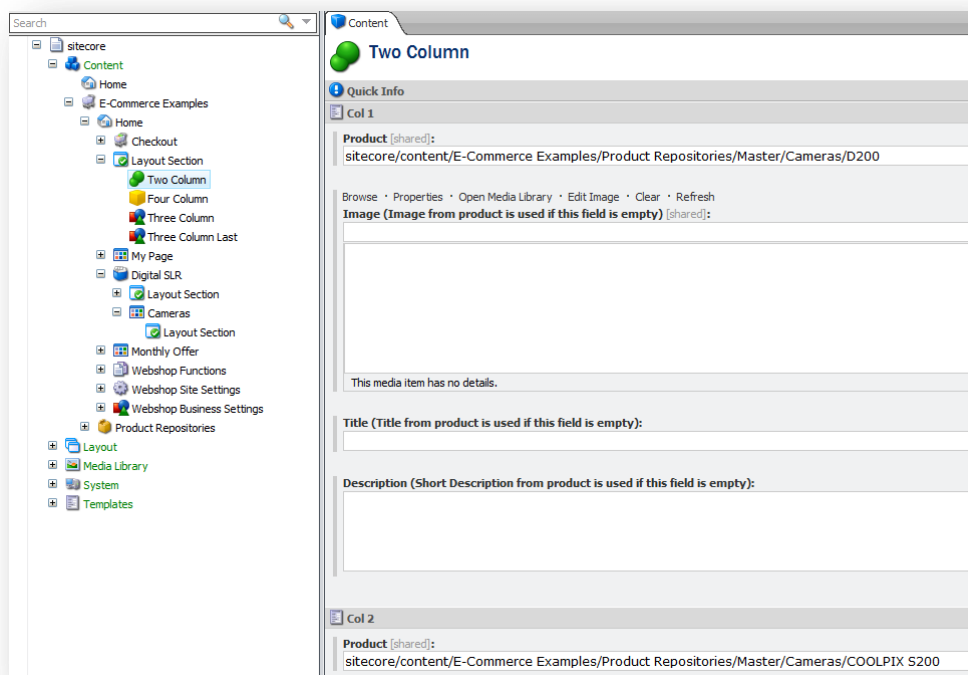
This item contains two **Col** sections that correspond to the two columns that it displays.

In the **Col 1** section, in the **Product** field, you can see that the *D200* camera has been selected and in **Col 2** the *COOLPIX S200* has been selected.

To change the product that is displayed in **Col1**, in the **Product** field, click the drop-down arrow.
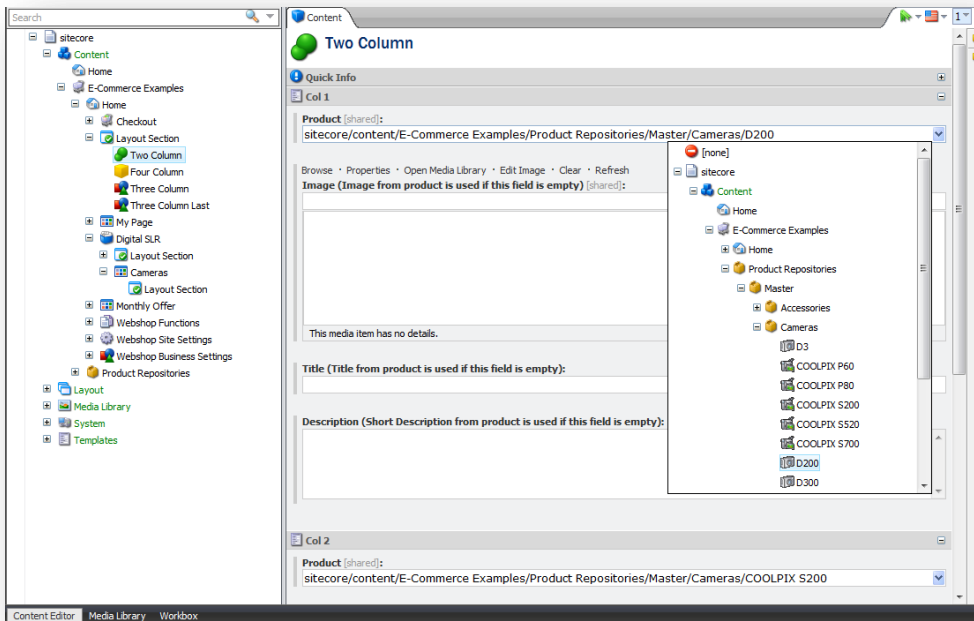
In the drop down list, select the product that you want to display in this column, for example the *D40*.

Note

The drop-down can be configured to restrict access to specific nodes in the content tree. This might be applicable if a user only has responsibility for a particular line of products on a webshop.

Save your changes and then select the *Home* item.

Click the **Presentation** tab and then in the **Preview** group, click **Preview** and you can see what the *Home* page will display after you publish your changes.
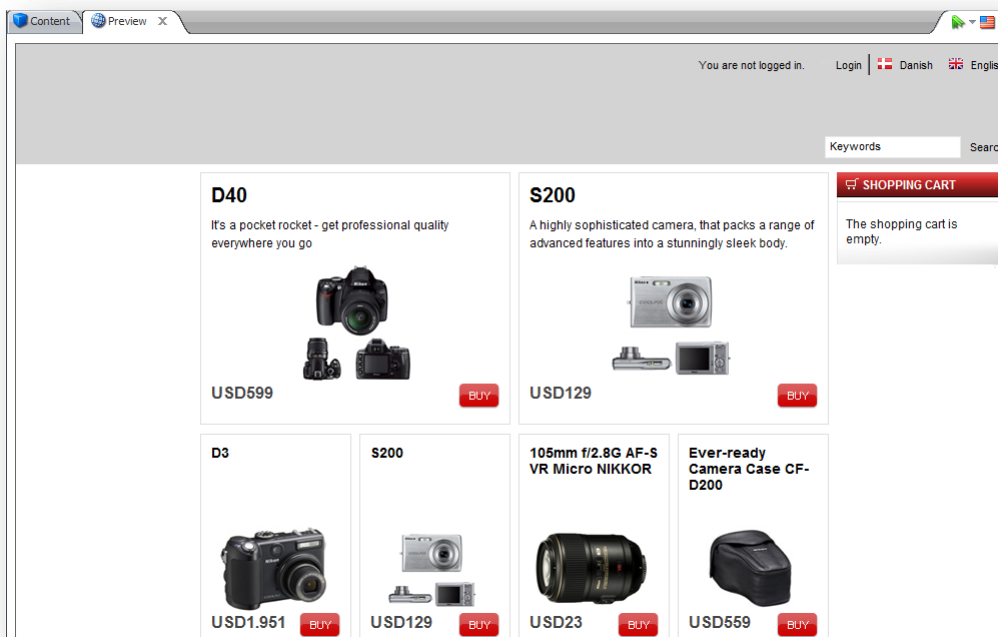
As you can see, pages that are constructed in this way show a static list of products that must be selected individually.

For more information about the predefined layouts that come with Sitecore E-Commerce Fundamental Edition, see *Chapter 3*, *Displaying Products*.

The Cameras Page

The products displayed on the *Cameras* page are selected using a search form.

Currently the *Cameras* page looks like this:
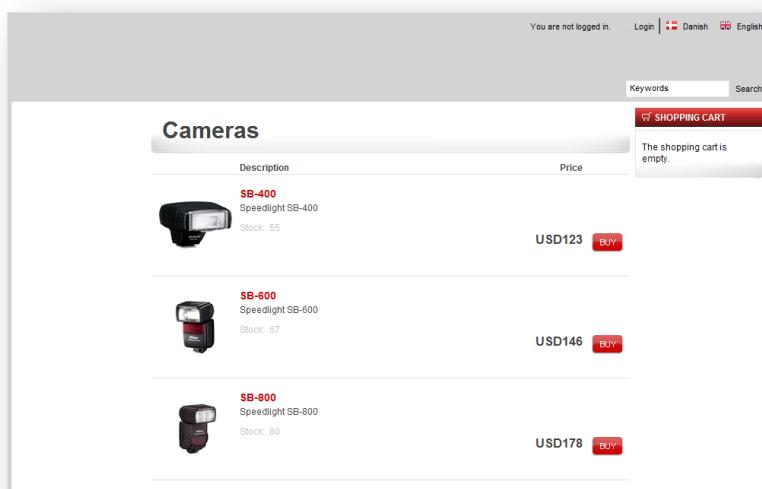
As you can see, this page doesn't actually display any cameras.

To select some cameras to display on this page:

1. In the **Content Editor**, click the *Cameras* item to expand it.
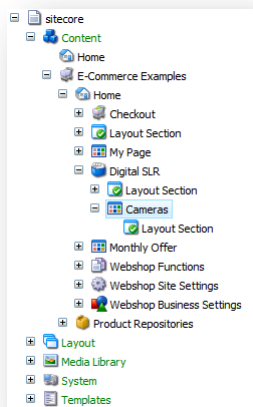
You can see that there is a *Layout Section* item. However, this item has no subitems and therefore does not affect the items that are displayed on the *Cameras* page or how they are displayed.

2. In the right-hand pane, click the **Product Page** tab.
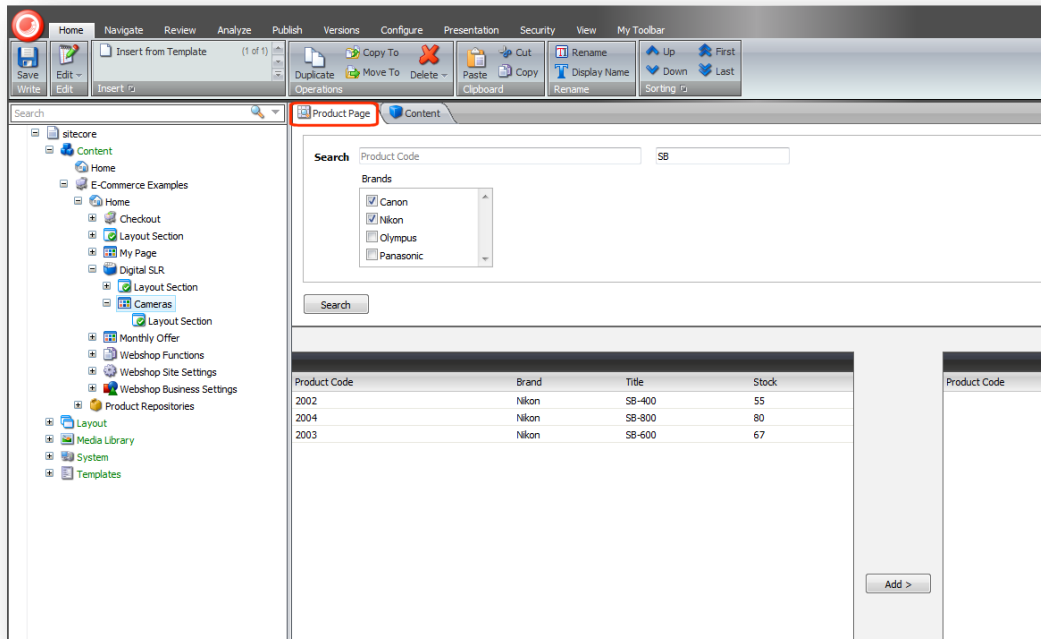
This is the search form that you use to select the items that are displayed on this page.

3. In the **Search** fields, enter the following search criteria: *Product Code* and *D*.

4. In the **Brands** check box list, select both *Nikon* and *Canon*.

5. Click **Search** and the page should display the following results:
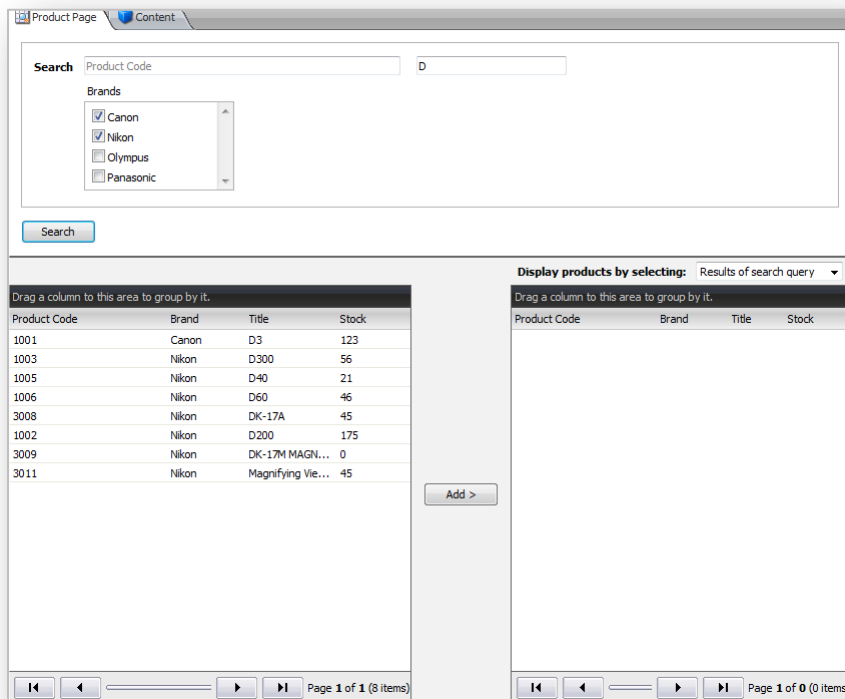
6. In the **Display products by selecting** field, click the drop down list and select *Manually picked products.*

7. In the pane that contains the search results, select a camera that you want to display and then click **Add** to move it over to the right-hand pane.

8. Add a few more products.

9. In the **Search** fields, enter the following search criteria: *Product Code* and *P.*

10. Click **Search**.

11. Add a couple of these products to the right-hand pane.

12. In the ribbon, on the **Product Page** tab, click **Save**.

13. Click the **Presentation** tab and then in the **Preview** group, click **Preview**.
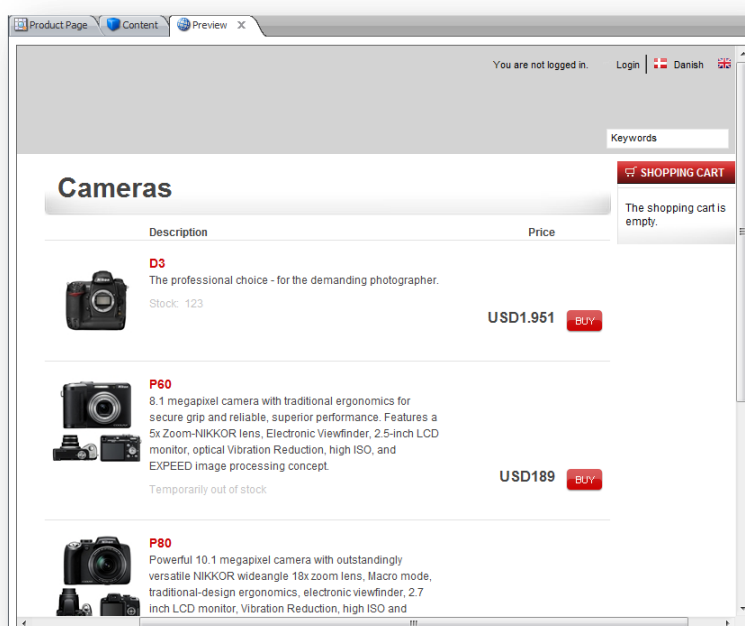
You must publish the *Cameras* item before it can be seen on your website.

2.2 Creating a Product Category

You will also need to create new product pages for your webshop. In this exercise, we have decided to add a new section to the webshop that highlights the products that are on special offer this month.

Note

The Monthly offer content item is now included in the E-Commerce Examples installation.

We therefore want to create a new category for these products.

To create a new product category:

1. In the **Content Editor**, select the *E-Commerce Examples/Home* item.

2. On the **Home** tab, in the **Insert** group, click **Insert from Template**.
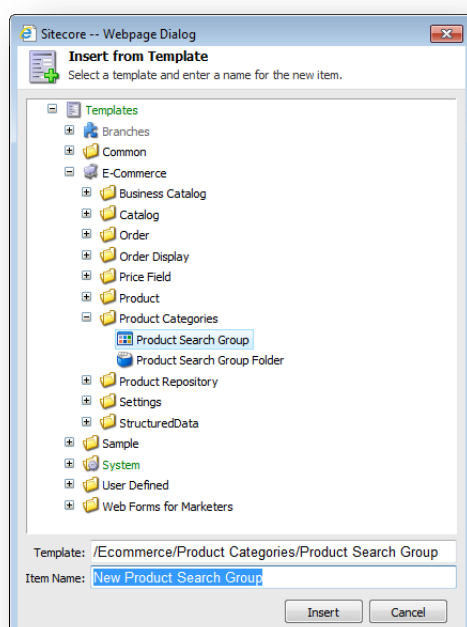
3. In the **Insert from Template** dialog box, navigate to the *E-Commerce/Product Categories* folder and select the *Product Search Group* template.

4. In the **Item Name** field, enter a name for the new category, for example, *Monthly Offer* and then click **Insert**.

The new category is added to the content tree:
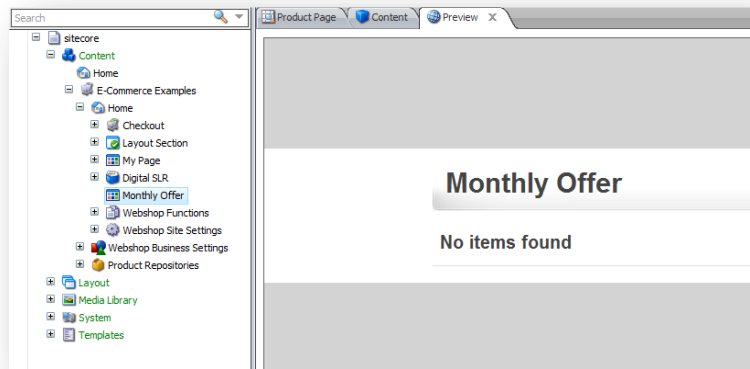
The next step is to add some products to the new *Monthly Offer* section.

2.3 Adding Products to a Category

In the Content Editor, you can see that the *Monthly Offer* product category contains a search form that you use to select the products to display in this category on your webshop.

To add products to the *Monthly Offer* category:

1. In the content tree, click the *Monthly Offer* item. The right-hand pane of the **Content Editor** displays the search form for this category.

2. In the right-hand pane, in the **Products Page** tab, in the search field, enter *Product Code* and *R* and then click Search.
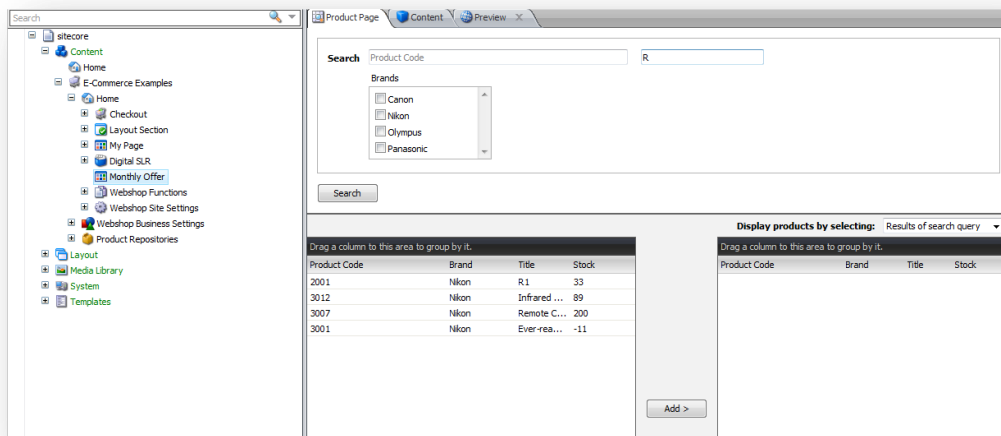
In the **Search**, **Product Code** field, you can enter the product code of a product if you know it. You can't use wildcards.

In the **Search**, **Title** field, you can enter the first letters of the product title. You can't use wildcards.
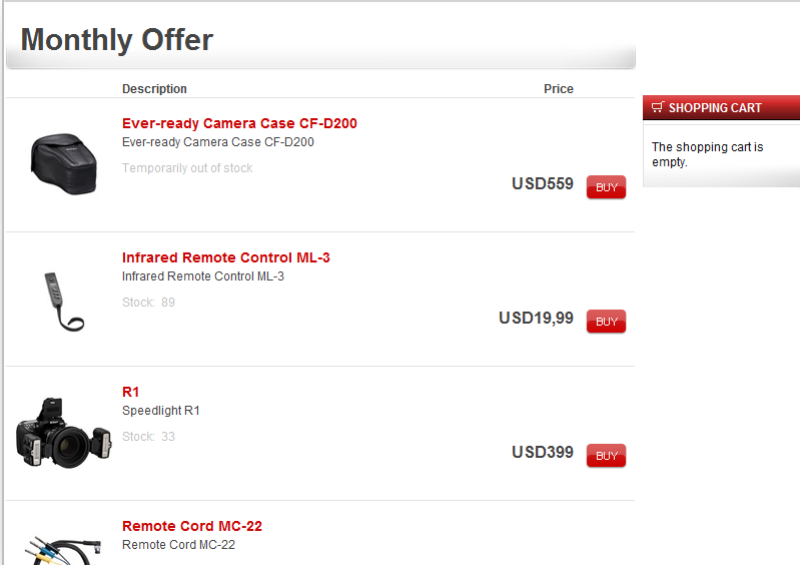
3. In the **Brands** check list, don't select anything.

4. In the **Display products by selecting** field, select *Results of search query*.

The **Display products by selecting** field has two options:

o *Results of search query* — the search results listed in the left-hand pane.

o *Manually picked products* — the items that you pick from the search and add to the right-hand pane. You can select products from several searches.

5. In the ribbon, on the **Product Page** tab, click **Save**.

6. Click the **Preview** tab and the *Monthly Offer* page should look something like this:

2.4 Editing a Product Item

After you import product information into the E-Commerce solution, you can edit the information contained in each product item. Each product item consists of several fields that contain information about the product. The sample pages contain cameras and photographic equipment and the fields that the product items contain reflect this.

In reality, the product item fields will vary from one implementation to another.

Note
If you use a data warehouse or back-end system to manage the product information on your site you may not be able to edit the product items in Sitecore. This depends on how you have implemented your E-Commerce webshop and the level of integration security you have set.

To edit a product item:

1. In the **Content Editor**, expand the *Products Repositories* node and locate the product item that you want to edit.

2. In the right-hand pane scroll down to the field that you want to edit, for example, the **Description** field.
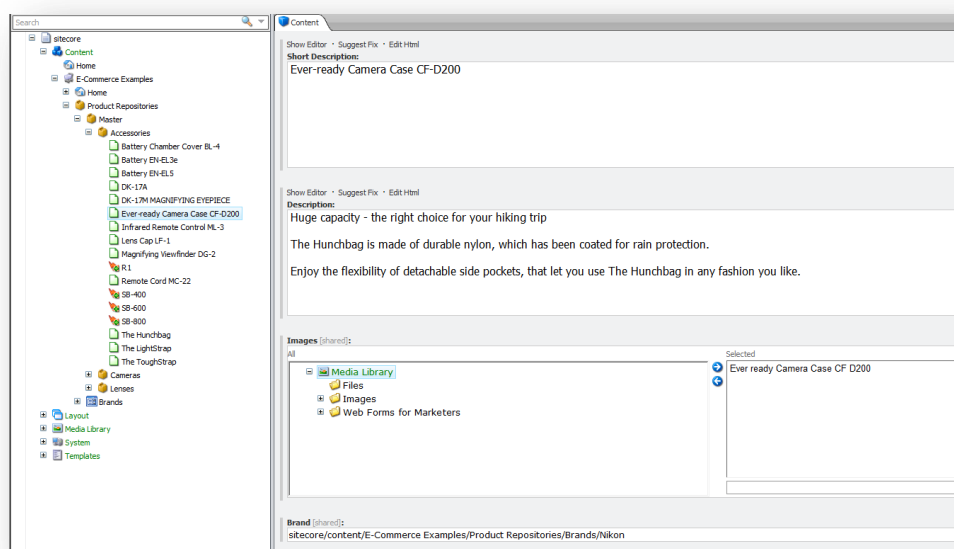

Note
Products items can be created from a number of different Sitecore templates and field names can therefore vary from one implementation to another.

3. In the **Description** field, click **Show Editor** to open the **Rich Text Editor**.
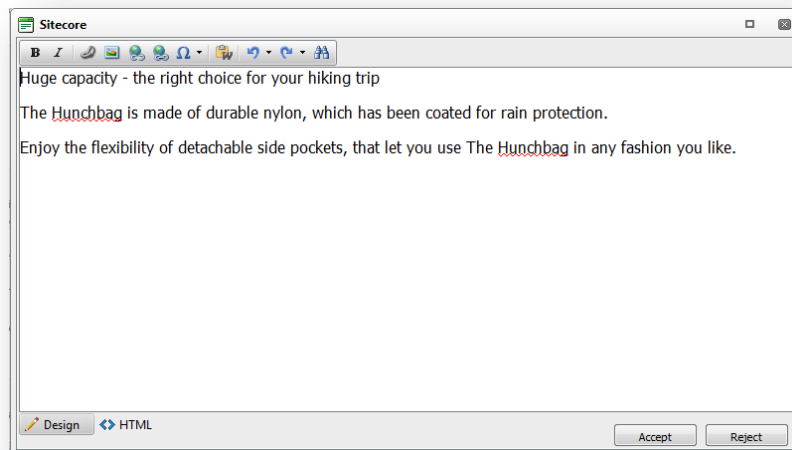
4. In the **Rich Text Editor**, enter the text that you want to display for this product and click **Accept**.

5. In the **Content Editor**, scroll down to the **Images** field.

   This field contains the image that is displayed with this product.
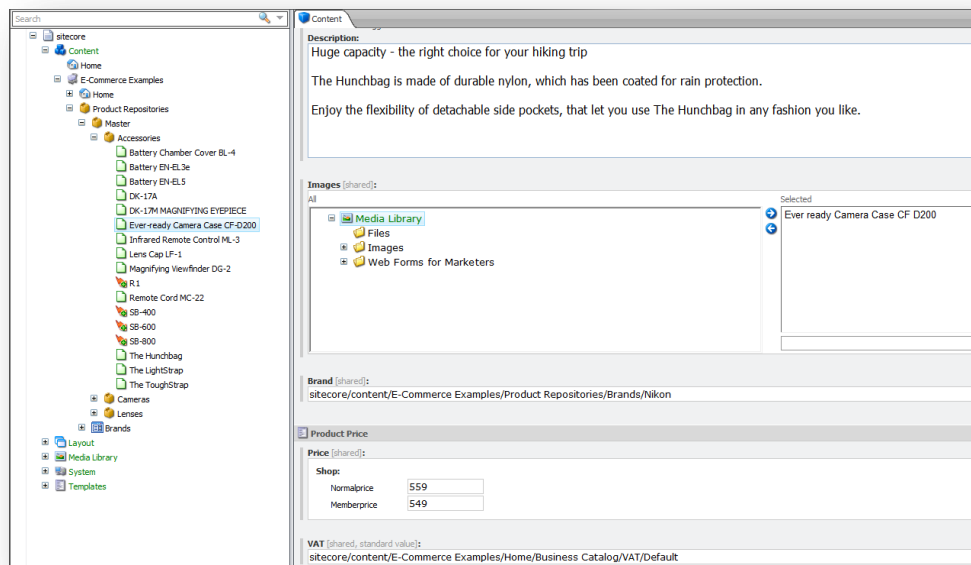

6. To use a different image, expand the images folder and scroll down to the image that you want to use and then click the arrow to move the image into the **Selected** field.

   This image must be available in the **Media Library**. If the image is not in the **Media Library**, you must upload it before you can display it in the product item.

To upload an image to the **Media Library**:

1. In the **Content Editor**, click the **Media Library** option at the base of the window to open the **Media Library**.
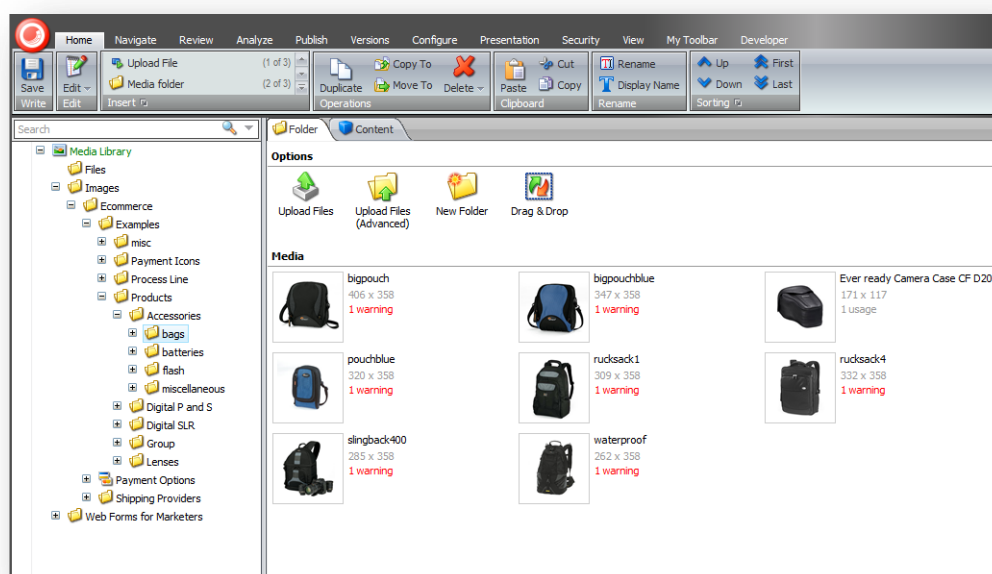
2. In the content tree locate the folder where you want to place the new image — in this case the *Products/Accessories/Bags* folder.

3. Select the *Bags* folder and then click **Upload Files**.

4. In the dialog box that appears, browse to the new image add it to the Media Library.

Once you have added the image to the Media Library, you can use it in your webshop.

2.4.1   Editing the Specifications of a Product

Every product item in the sample pages also has a specifications section that contains all of the details about the product.

You can enter the information in the specifications section directly into each product item in Sitecore or you can enter it into your data warehouse system and extract it from there. This depends on how your Sitecore installation has been configured.

The different types of product contain different kinds if information.

For example, a camera has an extensive list of specifications:
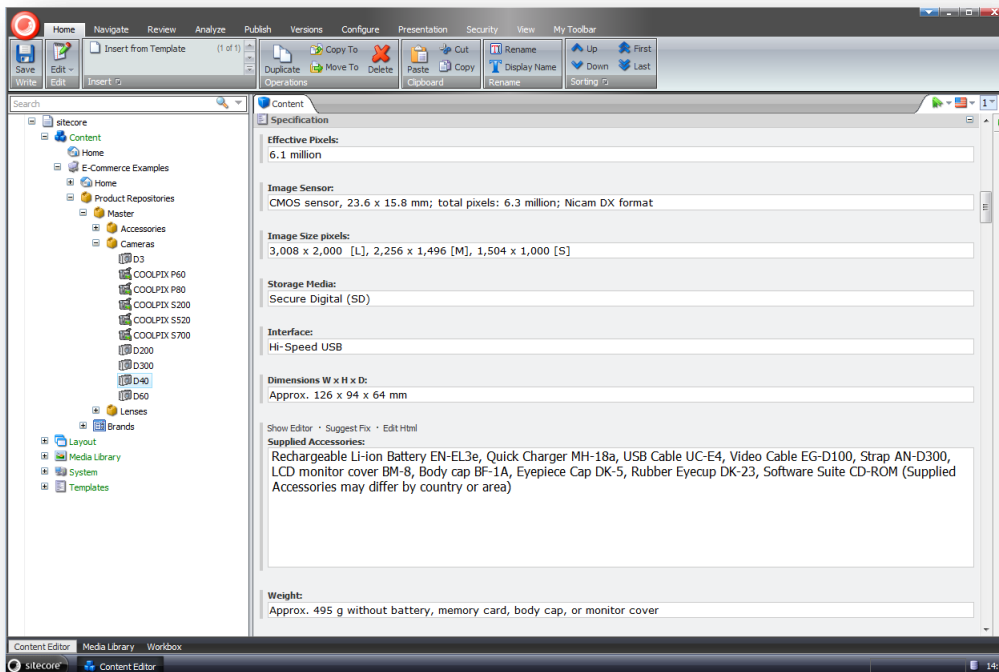
On the other hand, the specifications for a bag are considerably less detailed:
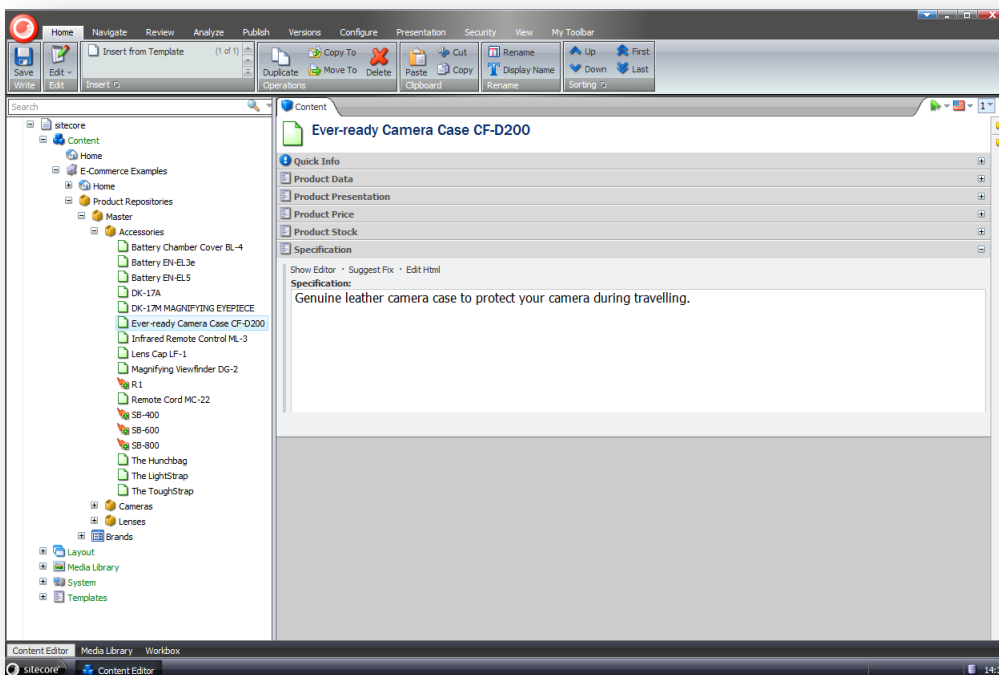
Chapter 3

Displaying Products

This chapter gives you an overview of layout sections and explains how you can use them in Sitecore E-Commerce Fundamental Edition to display and promote your products. It also includes step-by-step instructions on how to add layouts to a webshop.

This chapter contains the following sections:

- Configuring Layout Sections

- Editing Layouts

3.1 Configuring Layout Sections

Sitecore E-Commerce Fundamental Edition comes with a standard way of presenting content called layouts. Layouts give you more control over how you display your products and product categories.

You can use layouts on the home page and in product categories to promote products using images and other media, such as Flash or rotating banners. If you are using the E-Commerce solution and the Sitecore OMS, you will find this functionality particularly powerful when creating campaigns to promote a particular range of products. For example, you can use layouts in MV tests to make campaign landing pages more effective or as a way of presenting end user personalization.

For more information on using Sitecore E-Commerce Fundamental Edition and the OMS see: *SEFE OMS Cookbook.*

3.1.1 Overview

Layouts are Sitecore templates that give your products home page and product category sections a pre-defined appearance. Each layout template item has several fields containing text and images. In the example pages there are several standard layouts that allow you to display two or more products together with some text on the same page.

On your webshop you can use as many layout sections as you like, create new layouts, and configure them in any way you choose. Layouts are flexible and fully customizable.

In the example pages, the *Home* page has a layout section that uses the following layouts:

On the sample pages, when you add products to a pre-defined layout, such as a two, three, or four column layout, you can display a default image and text or choose to override these settings by adding images and text of your own. You can also add Flash media and other presentation devices, such as a two column rotator, depending on which layout you choose.

On the sample pages, each layout section can contain multiple layouts. You can use the same layout more than once or use any combination of the nine layouts available.

Note
Remember, the layouts used in this section have been created for the sample webshop as examples to demonstrate this functionality. To create layouts of your own you need developer knowledge.

Sample site layouts:

Layout		Description	Fields	Field Values
Two Column		Displays a row containing two products	Product	Browse to a product item in the Sitecore content tree.
			Image	Display the default image or select an image.
			Title	Display the default title or enter a title.
			Description	Display the default description or enter a description.
Three Column		Displays a row containing three products	Product Image Title Description	Same as Two Column layout
Four Column		Displays a row containing four products	Product Image Title Description	Same as Two Column layout
Rotating Flash Banner		Displays three different banner images as a Flash presentation	Flash	Link to a Flash media item stored in the Media Library.
			header 1	Enter a heading.
			subHeader1	Enter a sub heading.
			link1	Link to a product — enter a path.
			image1	Link to a banner in the Media Library.
Two Column Rotator		Rotating images displayed in a row with two columns	Items1	Select the images you want to rotate.
		Each column can rotate multiple images	Rotate Frequency1	Set the rotation speed — enter a numeric value.
			Sub item fields	To select the items to rotate, add them as sub-items below the Two Column Rotator.
			Image	Link to an image in the Media Library.
			Link	Insert the URL of a website.
Banner		Displays a single banner image with a link	Link	Insert the URL of a website.
			Image	Link to a banner image in the Media Library.

Layout		Description	Fields	Field Values
Rotating Banner		Displays multiple banner images with a link	Rotate Frequency(ms)	Enter a numeric value to control the time delay between images.
			Sub item fields:	Each rotating banner item has a sub item containing an Image and a link.
			Image	Link to a banner image in the Media Library.
			Link	Link to a product item.
Flash Banner		Displays a Flash SWF movie	Flash	Link to a Flash media file stored in the Media Library.
Rich Text		Displays a title and body text	Title	Enter title text.
			Text	Enter body text or images using the Rich Text Editor.

3.2 Editing Layouts

Each layout section consists of several layout items. Each layout item contains fields that you can edit to specify how products are displayed on the page.
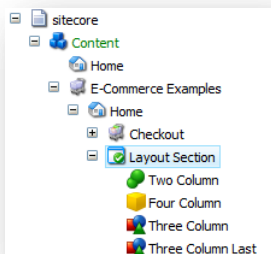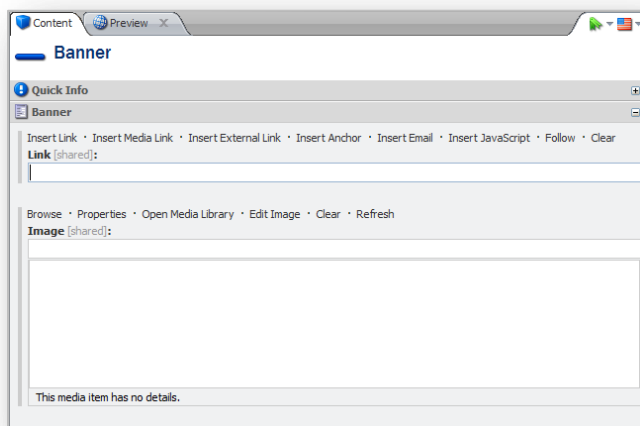

When you select a layout in the content tree, the fields associated with it are displayed in the **Content** tab on the right. The *Two Column* layout contains two sections — *Col1* and *Col 2*:
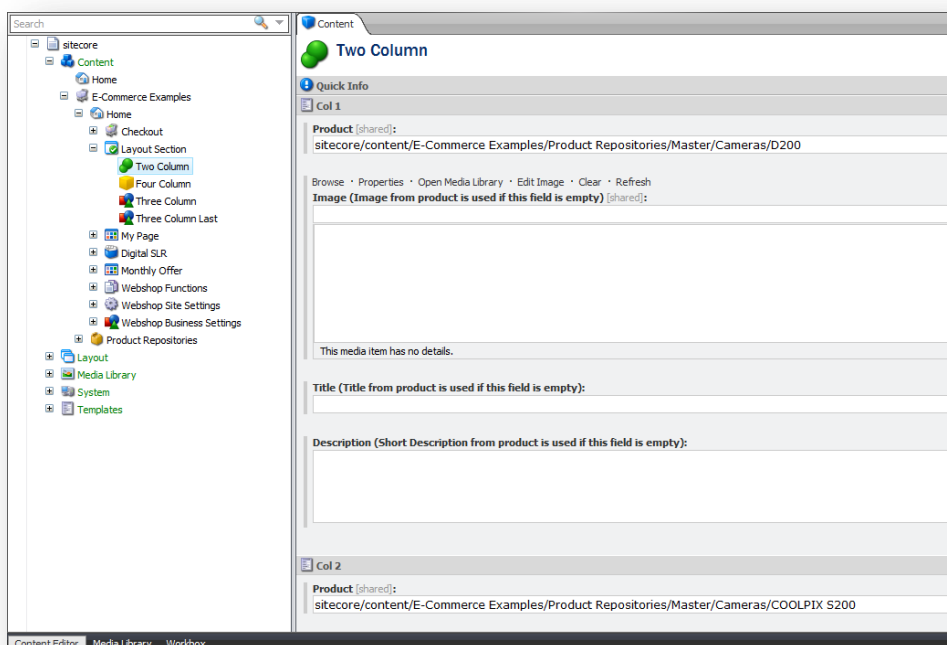
The *Two Column* layout contains four fields for each column:

- Product
- Image
- Title
- Description

The *Banner* layout is simpler:

The *Banner* layout only contains only two fields:

- Link

- Image

3.2.1 Editing a Layout

You can easily change the products that are displayed in a layout.

To edit a layout:

1. Open the **Content Editor**.

2. In the content tree, navigate to *Home* page, click the *Layout Section* for the page that you want to edit and then select the *Two Column* layout.
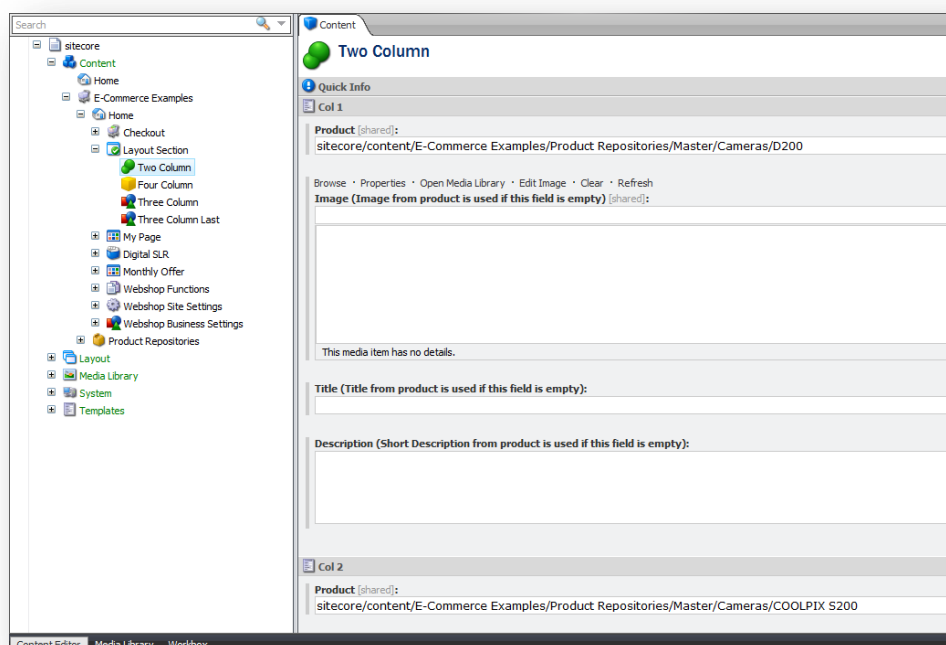
3. In the **Product** field, click the drop-down arrow, to see the content tree.
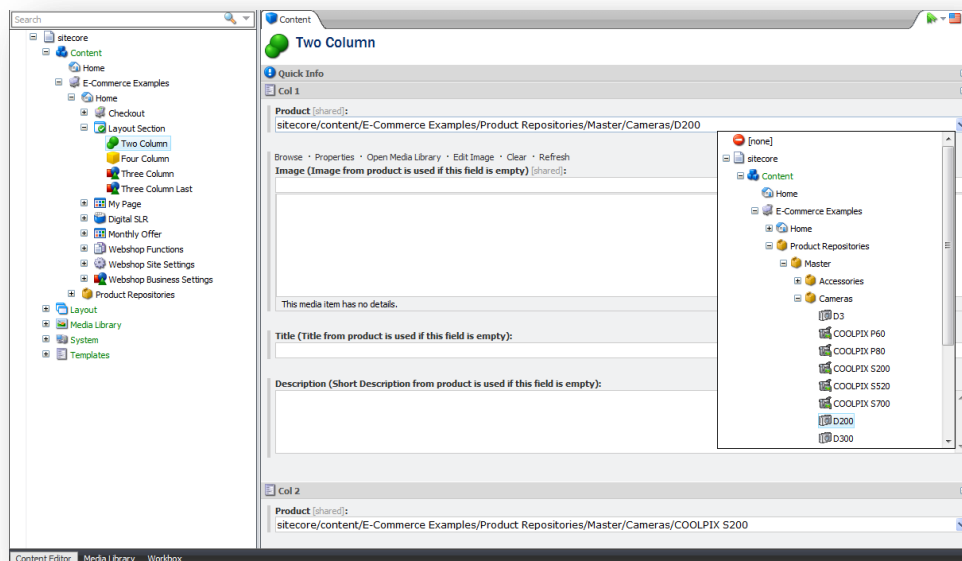
4. Select a different product, for example a lense. The path to this product is automatically added to the **Product** field.

Note

The drop-down can be configured to restrict access to specific nodes in the content tree. This might be applicable if a user only has responsibility for a particular line of products on a webshop.

5. In the ribbon, click **Save**.

The Image, Title, and Description Fields

You can see that the *Two Column* layout also contains **Image**, **Title**, and **Description** fields in each column. You can enter product information into these fields manually or you can use the information from the actual product item.

In the previous example, you selected a lense instead of a camera in Col1. However you didn't edit the remaining fields and they are still empty.

To view the changes that you made:

1. In the **Content Editor**, click the *Home* item.

2. Click the **Presentation** tab and then in the **Preview** group, click **Preview**.
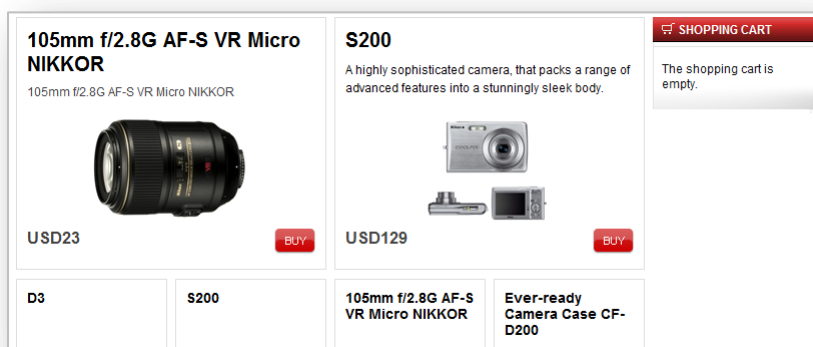
As you can see, the *Home* page displays the lense you selected including a short description, a picture, and the price.

If you would like to use a different image, you can edit the layout again and in the **Image** field select the image you want to use. You can also enter different name in the **Title** field and enter a new description for the product in the **Description** field.

For example:
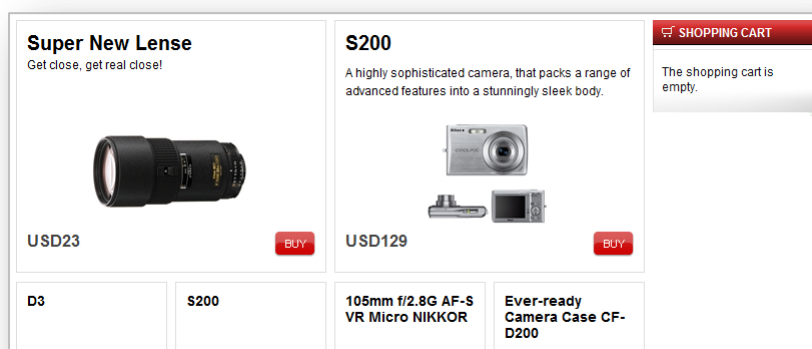
Arranging the Layout Sections

To change the order of the layouts in a layout section, you can either move the layout item using the Sitecore ribbon.

To change the order using the ribbon:

1. In the **Content Editor**, select the layout item you want to move, for example *Three Column*.

2. On the **Home** tab, in the **Sorting** group, click the **Up** and **Down** arrows to move this layout item to a different location in the content tree.

3.2.2   Adding a Layout Section

You can add a layout section to any product category on your e-commerce website.

To add a layout section to the *Monthly Offer* section we created earlier:

1. In the **Content Editor**, in the content tree, select the *Monthly Offer* item.

2. In the **Home** tab, in the **Insert** group, click **Insert from Template**.

3. In the **Insert from Template** window, navigate to the *Layout Section* template at `/User Defined/Ecommerce/Examples/Layout Section/Layout Section`
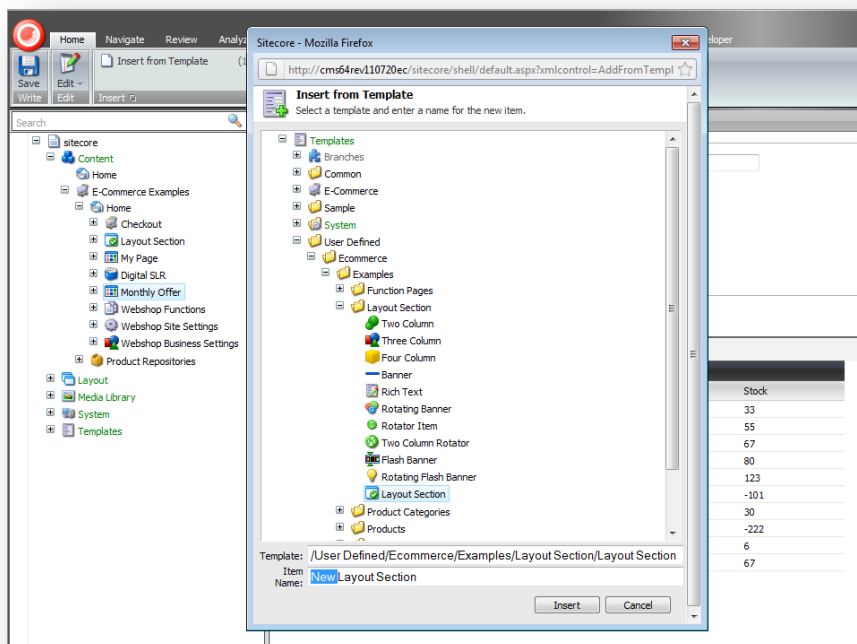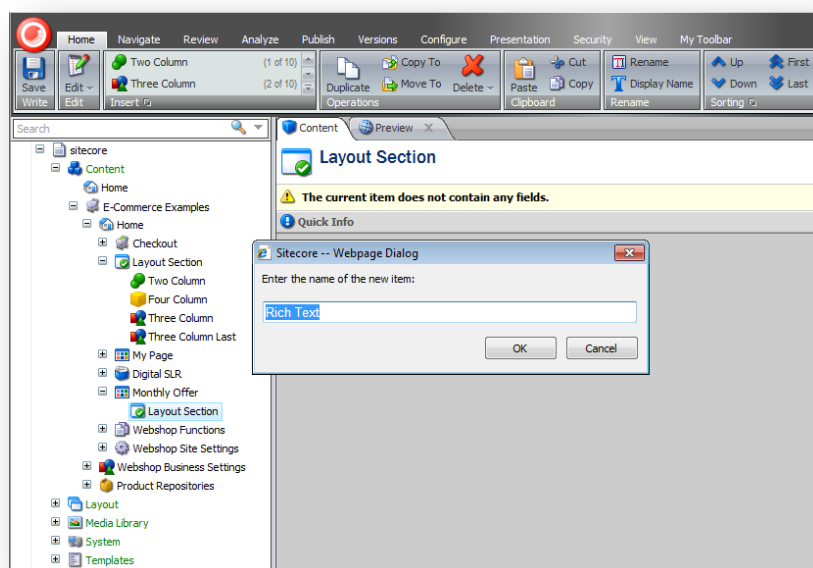

4. Change the default item name to *Layout Section*.

5. Click **Insert**.

6. In the ribbon, click **Save**.

Adding Layouts to a Layout Section

To add a two column layout to the *Monthly Offer Layout Section*:

1. Select the layout section that you added in the previous example.

2. In the **Home** tab, in the **Insert** group, click **Rich Text**.

In the SEFE, all of the available layout templates are displayed in the **Insert** group when you select a layout section.

3. Click **OK** to accept the default name *Rich Text*.

4. In the **Title** field of the *Rich Text* layout item, enter *Monthly Offer*.

5. In the **Text** field, enter the following text:

The Hunchbag is on special offer this month!

To take advantage of this offer, remember to create a new customer account.

Click here.

6. In the content tree, select the *Monthly Offer* layout section again and add another layout. This time select the *Two Column* layout item.

7. Click **OK** to accept the default name *Two Column*.

8. In the **Col 1** section, **Product** field, click the drop-down arrow and select *The Hunchbag*.
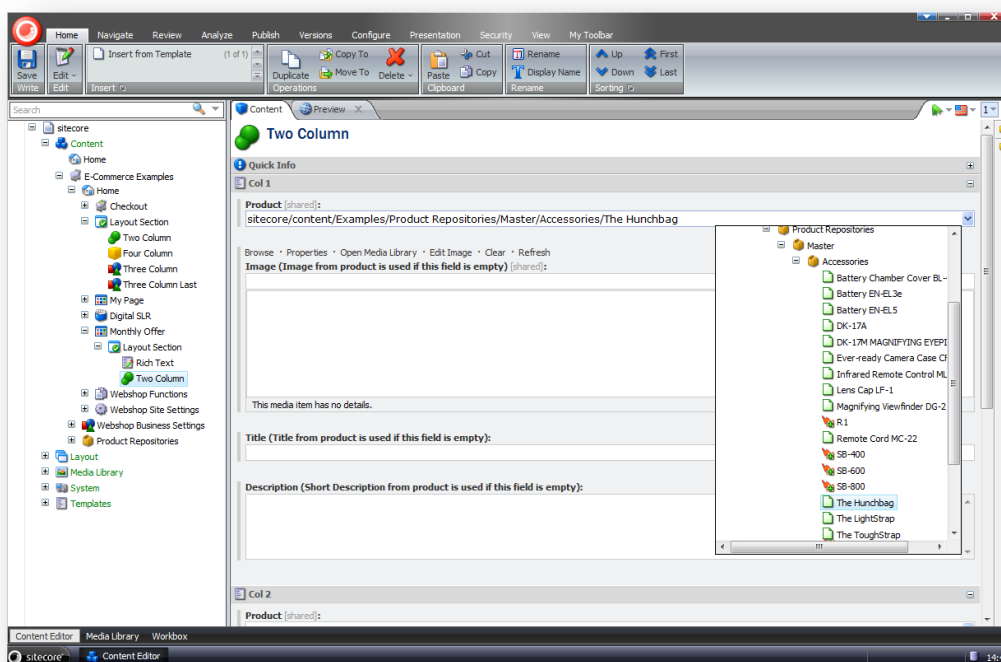
9. Add values to the other fields in the *Two Column* layout.

    Use the following table to complete the other field values:

Section	Field Name	Description	Value
Col 1	Product	Browse content tree for a product	*The Hunchbag*
	Image	Browse for an image — If left blank, default image is displayed.	*Leave blank*
	Title	Title displayed with product — If left blank, default name is displayed.	*Accessory of the Week*
	Description	Description of product — If left blank, default description is displayed	*This awarding winning top-of-the-range back pack has just been added to our range at a special introductory price!*
Col 2	Product	Browse content tree for a product	*Battery EN-EL3e*
	Image	Browse for an image – If left blank default image is displayed.	*Leave blank*
	Title	Title displayed with product - If left blank default name is displayed.	*Special Half Price Offer*
	Description	Description of product – If left blank default description is used	*For a limited period we are offering this battery at half its normal retail price.*

10. Save your changes.

11. In the content tree, select the *Monthly Offer* product category.

12. In the **Title** field, delete *Monthly Offer* — we don't need two headings on the page.

13. Click **Save**.

14. In the right-hand pane, click the **Preview** tab. The page should look something like this:
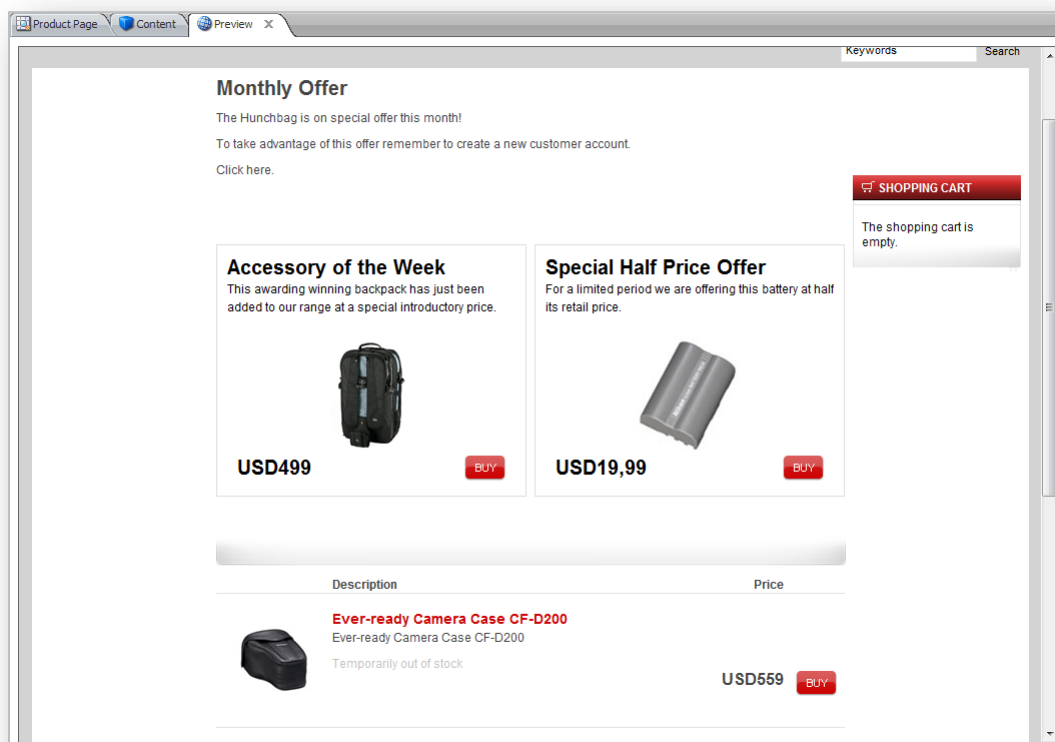
Note

You can only add a layout that already exists as a template in the webshop. To create a new layout for your website, you must be a developer with knowledge of XSLT and Sitecore presentation components.

Chapter 4

Shopping, Orders, and Customers

This chapter explains how to manage customers and orders in Sitecore E-Commerce Fundamental Edition. The topics covered range from understanding the sample checkout process, to searching for and managing customers and orders.

This chapter contains the following sections:

- The Sample Checkout Process

- Managing Orders

- Managing Customers

- Editing E-mail Templates

4.1 The Sample Checkout Process

The checkout process begins when a visitor decides to purchase the items they have added to their shopping cart. This process consists of several pages that lead the customer securely through the purchase process. Each page requires customers to provide information, such as, shipping address, payment method, and so on.

If you use the E-Commerce solution in conjunction with the OMS and Web Forms for Marketers, you can monitor the effectiveness of your checkout process. For example, you can see which customers failed to complete the checkout process and how many purchased products successfully. In the session report, you can see all the actions taken by a customer, such as editing the shopping cart, changing quantity and when they moved to the next stage of the process.

All this information can help you to improve the checkout process for future customers. A simple and efficient checkout process ultimately leads to more satisfied customers and increased sales.

For more information on using the OMS with the E-Commerce solution see *SEFE OMS Cookbook*.

4.1.1 The Sample Checkout Process

The checkout process can be implemented in many different ways; the following example is just one way to process customer orders.

On the sample pages there are three main stages in the checkout process:

If you log in as a returning customer, you see the following three steps along the top of the screen:

- Customer Details
- Payment
- Confirmation
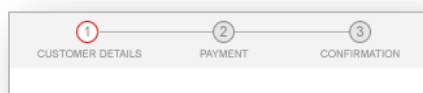
You can configure the checkout process by editing the text in the pages or by creating new pages.

We will now describe the sample checkout process. This is just an example of the kind of streamlined checkout system that you can build with Sitecore E-Commerce Fundamental Edition.

To buy some products:

1. You must add some products to your shopping cart before you can begin the checkout process.
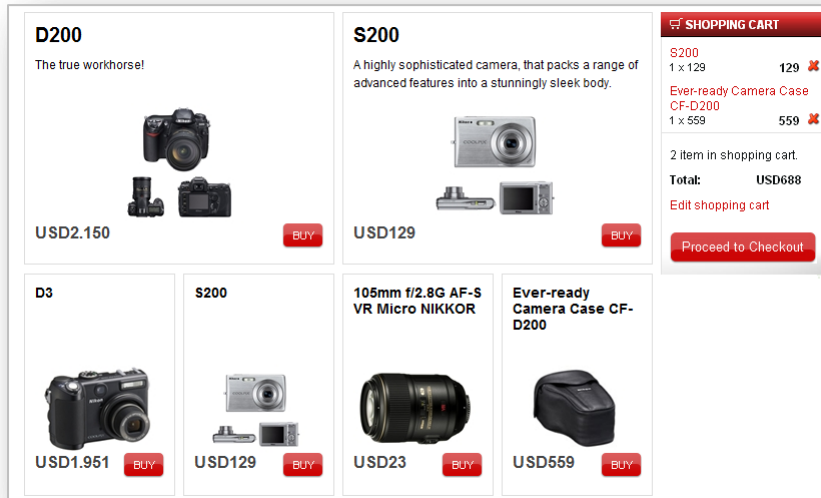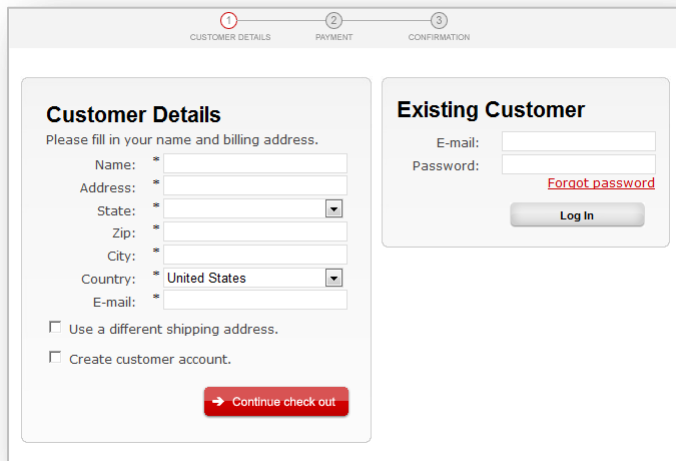
2. Then you can proceed to the checkout.
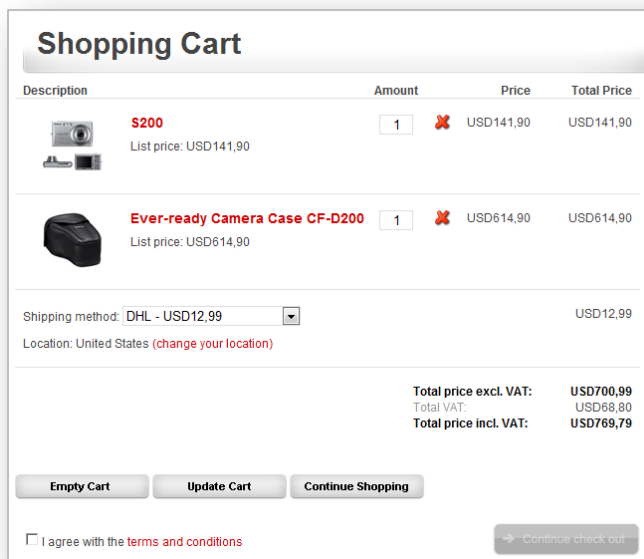
3. In the Shipping method field, select the shipping company that you want to deliver your order. The total price is updated accordingly.

4. When you have reviewed your shopping cart and are satisfied that you want to order these products, read the terms and conditions. If you agree, select the **I agree with the terms and conditions** check box and the **Continue checkout** button becomes active.

5. Click **Continue checkout** and you are redirected to the *Customer Details* page.
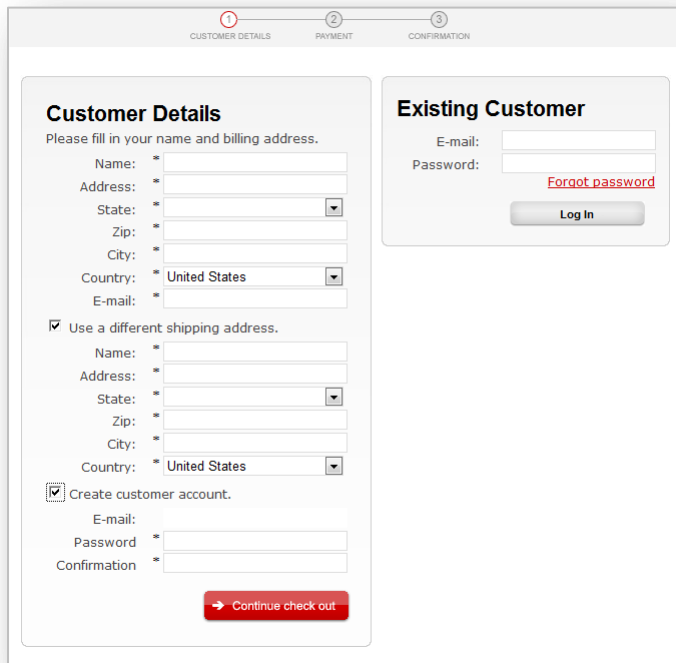
This page contains some forms that allow you to:

o Enter your personal details.

o Log in as a returning customer.

You can also:
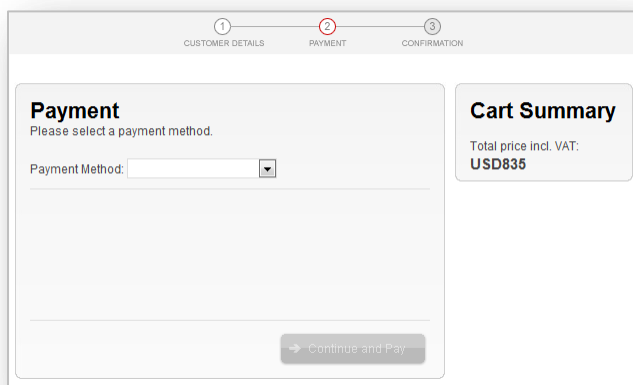
o Enter a different shipping address.

o Create a customer account.

This page contains all the forms that you need.

6. Enter all the appropriate details and click **Continue checkout** and then you are redirected to the *Payment* page.
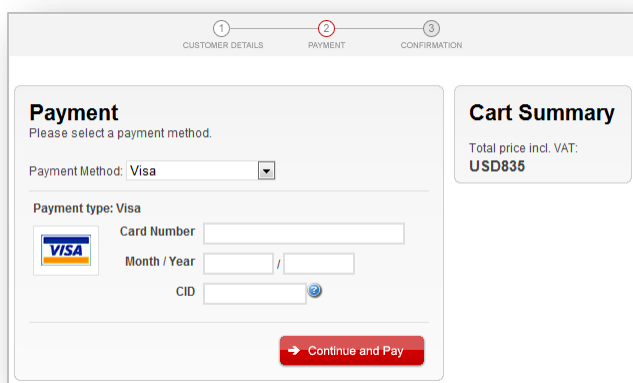
7. In the Payment Method field, select the payment method that you want to use.

When you select a payment option the page the displays the appropriate fields.
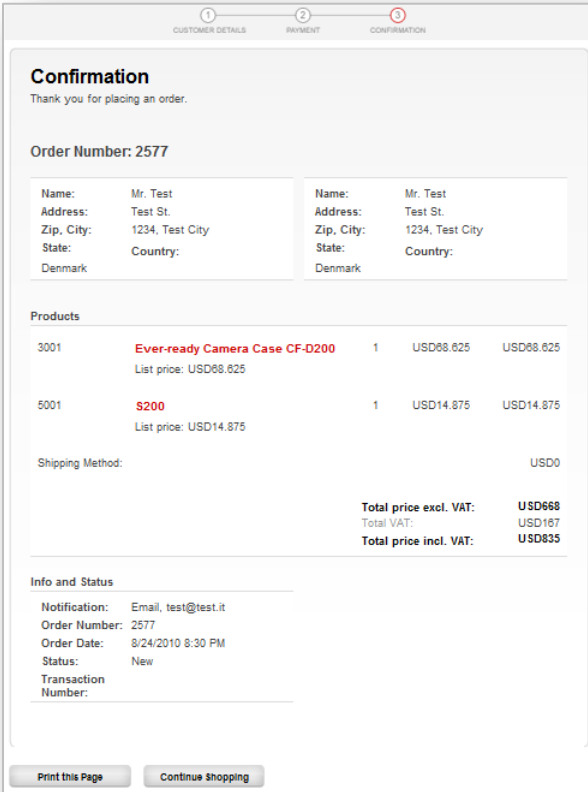
If you select an online payment provider, you are redirected to their payment pages.

8. Enter your payment details and then click **Continue and pay**.

You have now paid for your order and are redirected to the *Confirmation* page.


Customers receive an e-mail confirmation of their order and registered customers can view their completed orders from their own *My Page*. My Page displays a customer's order history and links to a copy of all their completed order confirmation pages.

4.1.2   Customizing the Checkout Process

You can implement your own checkout process or you can change the configuration of the existing checkout pages. For example, you can change the fields in the forms or you could add more notification option or payment options as well as a delivery options page if you need one. You can edit the text displayed in each form or you could add more steps to the overall check out process.

To customize the checkout process you need access to the following Sitecore components:

- Checkout node — to edit the checkout chain pages and the process line.
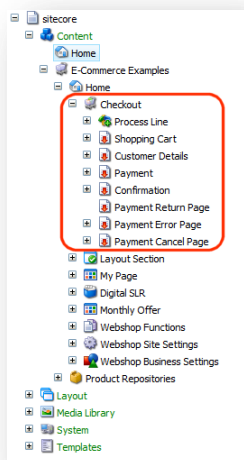
- Web Forms for Marketers — to edit the forms that are displayed on these pages.
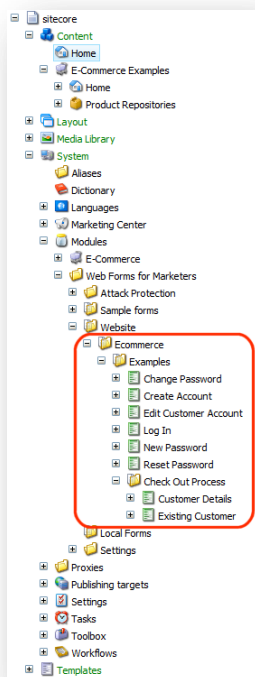
Note

Everything in the check out process is customizable and configurable but this is usually a developer task, so beyond the scope of this cookbook.

For more information about configuring the checkout process and the rest of the E-Commerce Fundamental Edition, see the *SEFE Installation and Configuration Guide*.

4.2 Managing Orders

In the E-Commerce solution, all the orders placed by customers are stored in the *Webshop Business Settings* under the *Orders* node. When a customer creates an order it is stored in a hierarchy of folders that are created on the fly. This type of folder hierarchy is known as *structured data* and is used when it is necessary to store a large number of items in the Sitecore content tree.

4.2.1 Storing Orders

Customer orders can number in the thousands so using structured data provides a logical way of keeping track of all your orders.
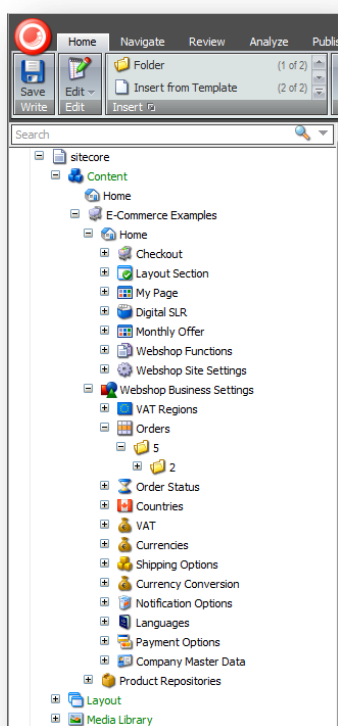
To find an individual order manually, you need to drill down through several sub-folders. The labeling of these folders conforms to the following naming convention:

- The first four folders are named after the first four digits of the order item's ID.

- The remaining digits correspond to the order number.
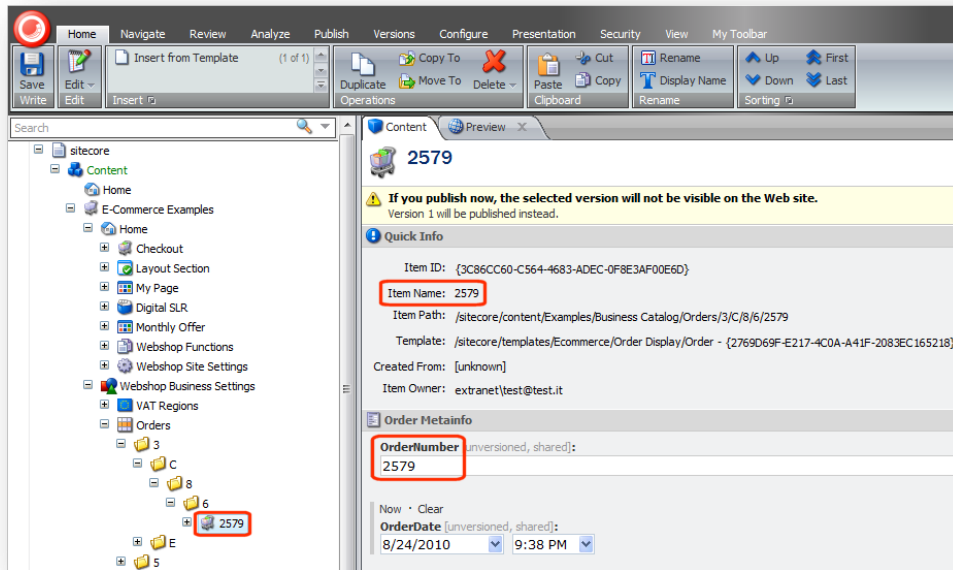
Together these values create a unique identifier for every order.

Navigating the content tree is not the ideal way to find customer orders. It may be effective to search manually if you only have a few orders but on most e-commerce websites orders can number in the thousands, so more effective ways of searching for orders is essential.

4.2.2 Searching for a Order

In the E-Commerce solution, you can use the Order Catalog search form to find individual orders in the structured order data.
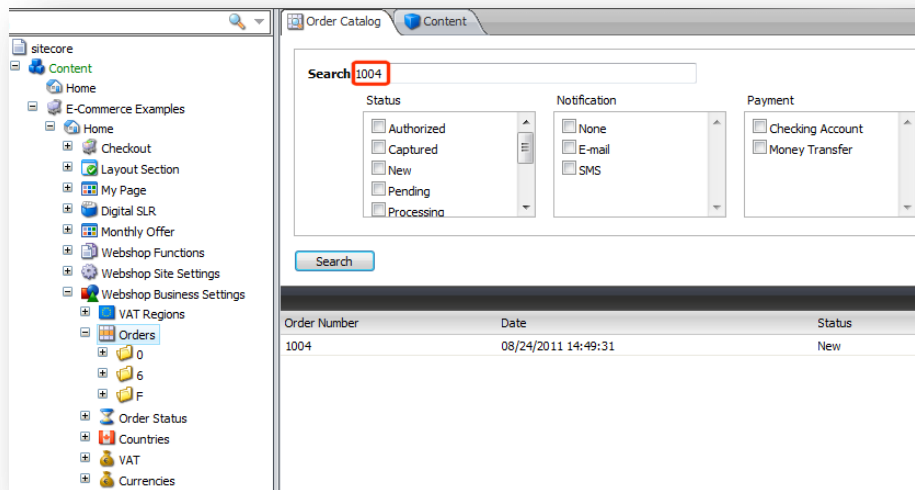
Using the Order Catalog Search Form

To display the orders search form, in the content tree, navigate to the *Webshop Business Settings/Orders* folder and the **Order Catalog** search form appears.
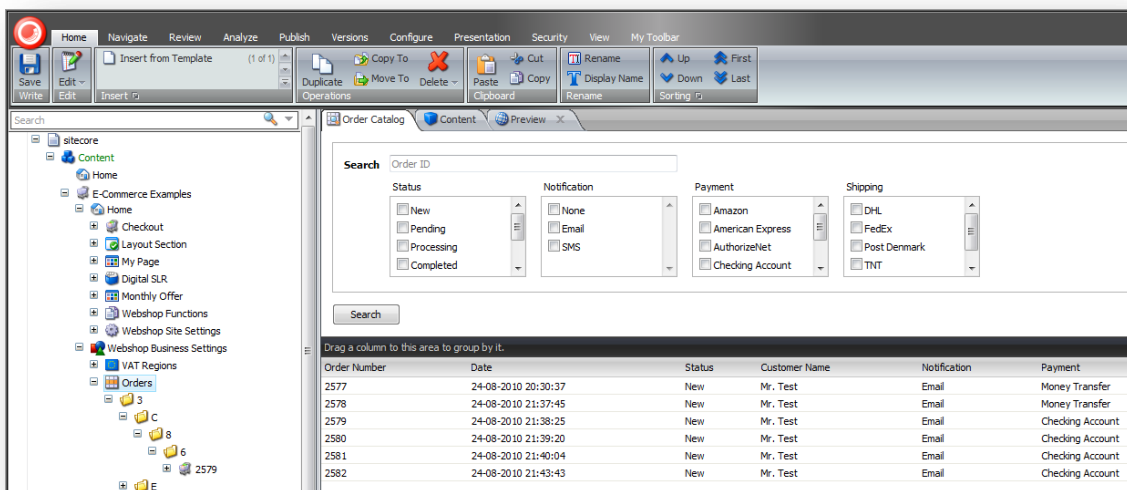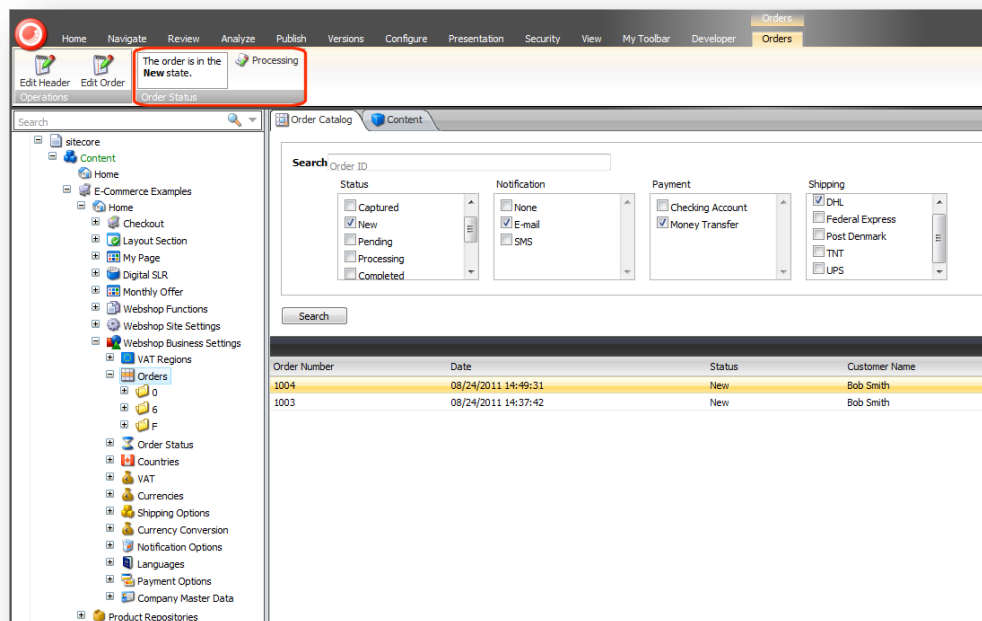
To search for an order:

1. In the search field, enter the number, if you know it, for example, *1004*.

2. Click **Search** and order *1004* appears in the results panel.


3. Alternatively, you can select one or more of the check boxes in the list boxes on the **Order Catalog** tab and filter the orders according to the criteria you select.

When you select an order, some buttons appear in the ribbon in the **Orders** tab, in the **Order Status** group. The buttons that appear are the current status and the actions that you can perform on this order. The options that are available depend on the current status of the order.

For example, the current order in this example — 1004 — is *New* and when your order handler or dispatcher has filled the order and shipped it, the status changes to *Completed*.
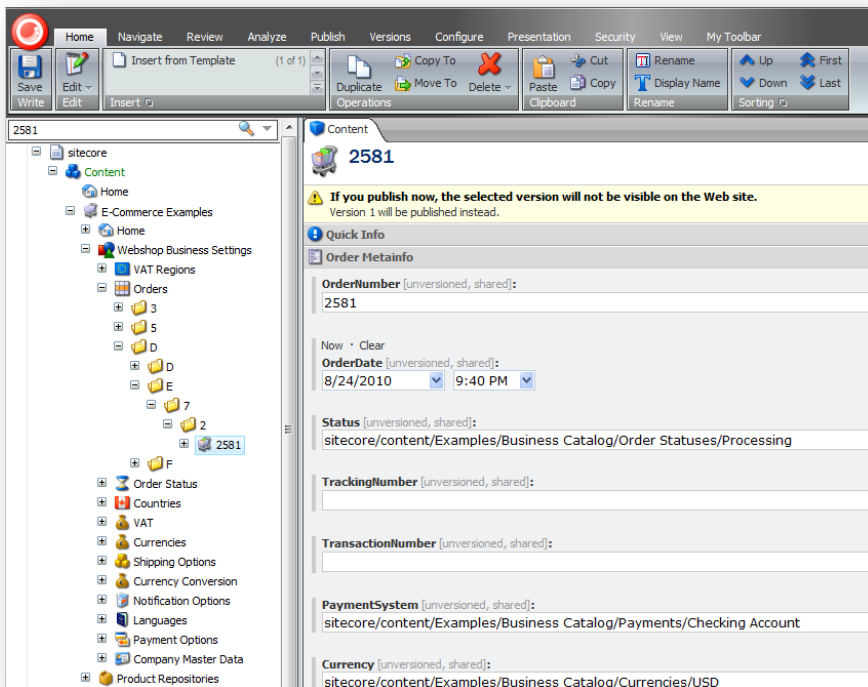
4. In the **Orders** tab, **Operations** group, click **Edit Header,** and a dialog box appears that contains the shipping and billing information for the current order.
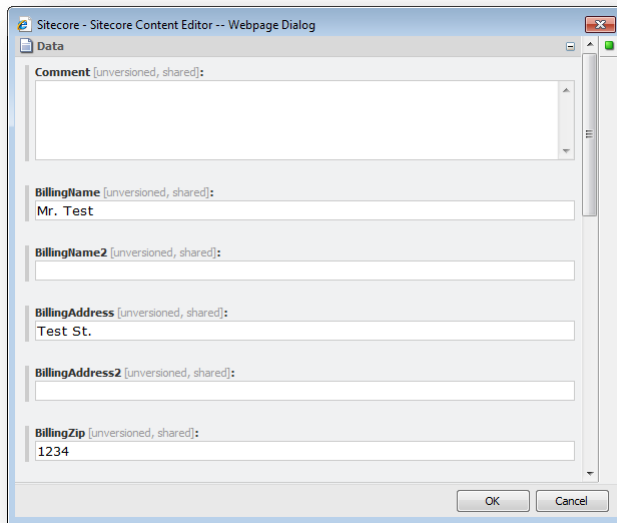
You can edit this information if you need to amend the order.

Tip
If you have the order number, another quick way to find an order is to enter the order number into the content tree search box and press enter.

4.3 Managing Customers

In the E-Commerce Fundamental Edition, we have divided customers into two basic types:

- Registered customers who have created a customer account.

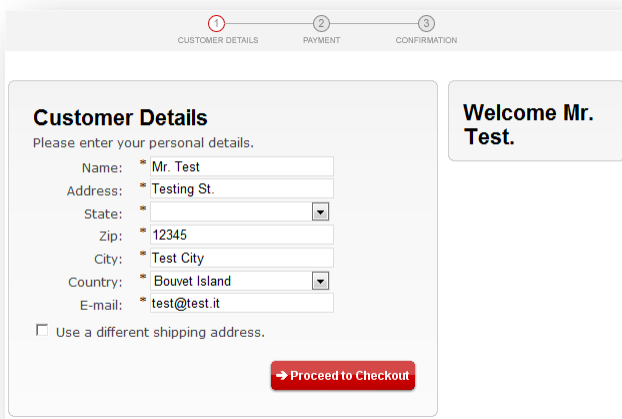- Unregistered customers who just want to place an order.

The details of registered customers are stored in the Sitecore *User Manager*, while the details of unregistered customers are contained in the customer order.

In the sample pages, a customer must first enter some details, such as their name, delivery address, and e-mail address before they can complete the checkout process. However, registration is not compulsory. On most e-commerce websites, customers can buy products without registering. Registration makes the checkout process quicker but is usually only presented to the customer as an option.

4.3.1 Registered Customers

Registered customers are site visitors who have created a customer account and provided their customer details. This makes the check out process quicker and easier for them.

Once a customer has created a customer account and logged in, when they place an order, their customer billing details appear correctly in the *Customer Details* form. They can continue to the next stage of the checkout process straight away.

When a registered customer logs in they get access to a personalized *My Page* where they can easily review their purchase history, edit their personal details, and change their password. When a registered customer has placed an order, they can view the details of their order and monitor how it is progressing.

Customer Information

When a customer places an order, all the information about the order is stored in the order item.

Each order item contains the following information:

- Customer Details — name, e-mail address, phone number, and so on.

- Billing Address — name, address, and so on.

- Shipping Address — name and address that the order should be shipped to.

- Totals — the total number of products ordered and the total cost.

When a visitor creates a customer account this creates an entry in the *User Manager* and some information about the customer is also stored here.
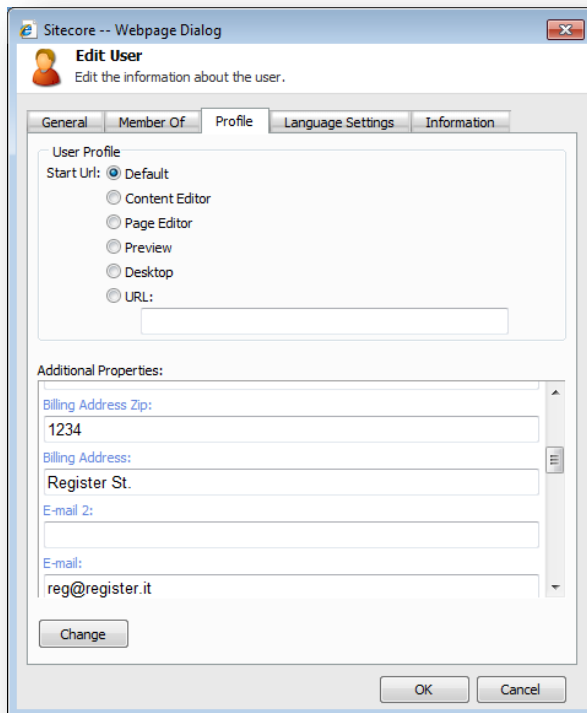
To view a registered customer in the *User Manager*:

1. In the Sitecore Desktop, click the **Sitecore** start menu.

2. Click **Security Tools**, **User Manager**.
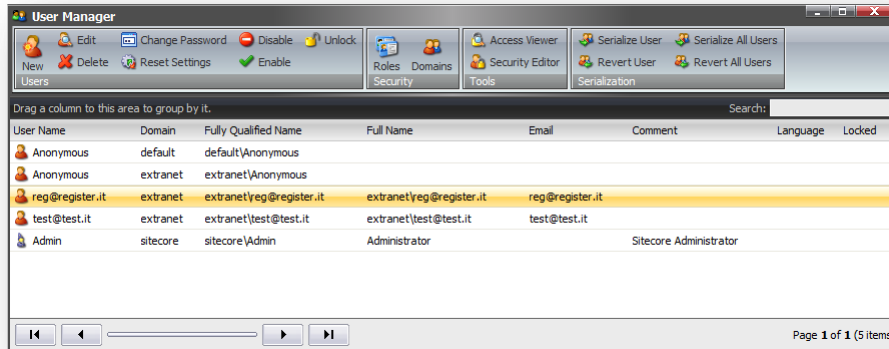
3. Select the user you want to view and then click **Edit**.

In the **Edit User** dialog box, you can see all the information related to the selected customer, for example, *Billing Address* and *E-mail Address*.


4.3.2 Unregistered Customers

If a customer chooses not to create a customer account when they are making a purchase, their details are still saved in the same way as other customer orders but they are not added to the list of users in the *User Manager*.

The only place where their name is recorded is in the *Billing Address* section of the order item.

The default *Order Catalog* search page does not allow you to search on this field but you can configure the search form to include it.

4.3.3 Viewing Customer Purchase History

In the sample pages, a registered customer can easily view their own purchase history.

1. When a registered customer opens the *Order History* page, they can see a list of all the orders they have placed on the webshop.
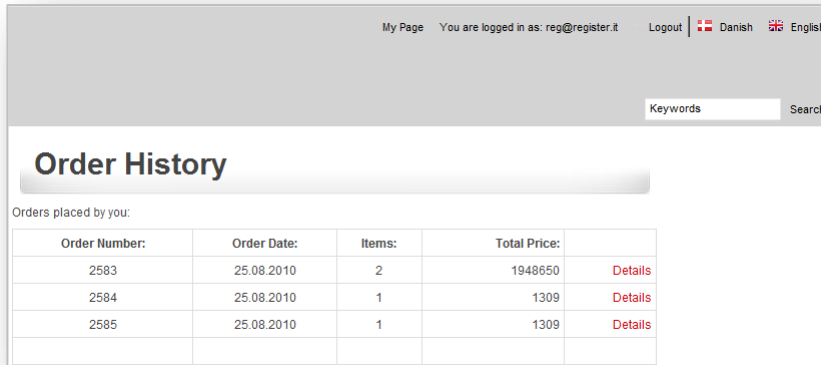
2. Select one of the orders and then click *Details* and the *Order Confirmation* page associated with that order appears.
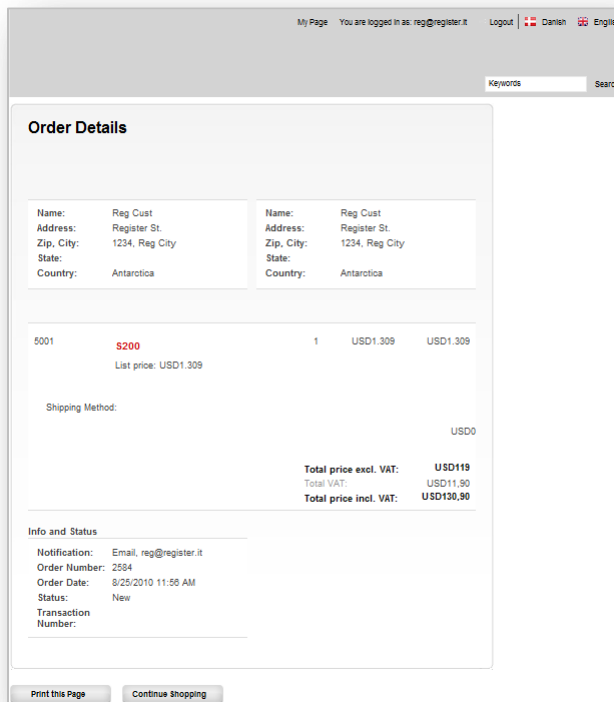
4.4   Editing E-mail Templates

On an e-commerce website, when a customer completes a desired action such as creating a customer account or confirming an order, a pre-defined e-mail message can be sent to the e-mail address the customer provided.

The Sitecore E-Commerce Fundamental Edition contains several predefined e-mail message templates. You can customize these templates or create your own e-mail message templates.

Sitecore E-Commerce Fundamental Edition contains the following e-mail templates:

E-mail Template	Description
Contact Us	Sent to the webshop from a visitor with a query.
New User Confirmation	Sent to the customer after they create a customer account.
Order Mail To Admin	Sent to the order processor after a customer places an order.
Order Mail To Customer	Sent to the customer as confirmation of an order.
Your password has been changed	Sent to the user after changing their password.
Your password has been reset	Sent to the user informing them that their password has been reset.
Reset your password	Sent to the user instructing them how to change their password.

To access the standard e-commerce e-mail templates, navigate to the following location in the Sitecore content tree: `/Webshop Site Settings/MailTemplates`
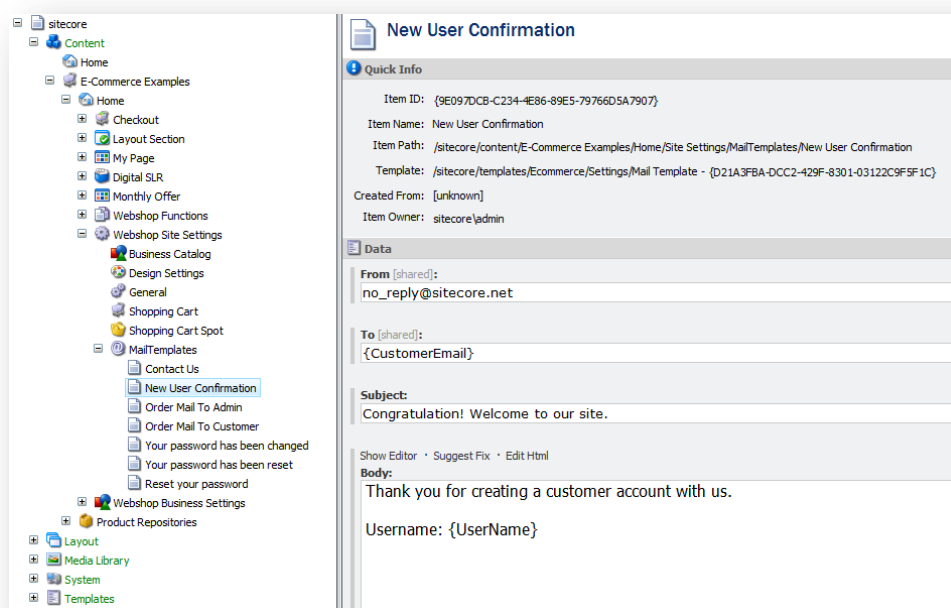
4.4.1   Editing E-mail Templates

If you have the appropriate access rights, you can edit the e-mail template messages.

To edit an e-mail template:

1. In the **Content Editor**, select an e-mail template, for example, *New User Confirmation*.

```
/Webshop Site Settings/MailTemplates /New User Confirmation
```


2. In the *New User Confirmation* item, in the **Subject** field, enter the following text: *Congratulations and welcome to our webshop, happy shopping!*

3. In the **Body** field, click **Show Editor** and enter the following text in the rich text editor: *Thank you for registering. Remember, if you spend more than 100 Euros you qualify for 10% off your next purchase!*

4. In the ribbon, click **Save**.

Note
It is easy to edit the display text in a standard e-mail message but creating new e-mail message templates is a developer task.