

# Sitecore E-Commerce Services 2.2 on CMS 7.0 or Later Sitecore E-Commerce Cookbook

A marketer's guide to Sitecore E-Commerce Services



### **Table of Contents**

Chapter 1 Introduction	3
1.1 The Sample Web Shop	4
1.1.1 Viewing the Sample Web Pages	4
1.1.2 The Sitecore E-Commerce Content Tree	5
Home	6
Webshop Business Settings	7
Product Repositories	
1.2 Editing Items in Sitecore	8
The Page Editor	8
The Content Editor	
Chapter 2 Managing the Product Portfolio	
2.1 Product Information Management	
2.1.1 Organizing Product Categories and Items	
2.1.2 Adding Products to Pages	
The Home Page	13
The Cameras Page	16
2.2 Creating a Product Category	
2.3 Adding Products to a Category	
2.4 Editing a Product Item	24
2.4.1 Editing the Specifications of a Product	26
Chapter 3 Displaying Products	28
3.1 Configuring Layout Sections	
3.1.1 Overview	
3.2 Editing Layouts	
3.2.1 Editing a Layout	33
The Image, Title, and Description Fields	34
Arranging the Layout Sections	
3.2.2 Adding a Layout Section	35
Adding Layouts to a Layout Section	36
Chapter 4 Shopping and Customers	
4.1 The Sample Checkout Process	
4.1.1 The Sample Checkout Process	41
4.1.2 Customizing the Checkout Process	
4.2 Managing Customers	
4.2.1 Registered Customers	
Customer Information	
4.2.2 Unregistered Customers	
4.2.3 Viewing Customer Purchase History	
4.3 Editing E-mail Templates	
4.3.1 Editing E-mail Templates	50
Chapter 5 Appendix	
5.1 Managing Orders	
5.1.1 Storing Orders	
5.2 Searching for an Order	
Using the Order Catalog Search Form	55



# **Chapter 1**

## Introduction

The Sitecore E-Commerce Services 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 to display products in the webshop, 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 Services. 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 and Customers
   This chapter explains the sample check out process and how to manage customers.
- Chapter 5 Appendix
   The Appendix contains deprecated information Shopping and Customers

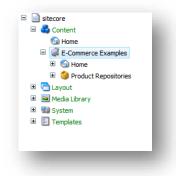


### 1.1 The Sample Web Shop

The Sitecore E-Commerce Example Pages package includes a few example pages that illustrate some of the typical functionality that a webshop should contain. The sample webshop sells cameras and photography products to demonstrate the key functionality in the Sitecore E-Commerce Services (SES) and Sitecore Digital Marketing Suite (DMS).

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, as well as managing DMS 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 Services; 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.

📄 sitecore 🖃 💑 Content	Cigital SLR
Home     Generation Examples	Quick Info
🗉 🙆 Home	Item ID: {32AEEB8E-6820-4CEF-94AB-4C848D5CDCE8}
Greckout     Gedaut Section	Item Name: Digital SLR
My Page	Item Path: /sitecore/content/E-Commerce Examples/Home/Digital SLR Template: /sitecore/templates/Ecommerce/Product Categories/Product Search Group Folder - (2E530AAF-C68E-493E-977E-24DA4B6093BD)
<ul> <li>Digital SLR</li> <li>Layout Section</li> </ul>	Created From: [unknown]
III Cameras     III Monthly Offer	Item Owner: sitecore\admin
Webshop Functions	E Data
Webshop Site Settings Business Catalog	Title: Digital SLR
🚯 Design Settings 🕜 General	Show Editor · Suggest Fix · Edit Html
Shopping Cart	Short Description [standard value]:
Shopping Cart Spot MailTemplates	
Contact Us	
Order Mail To Admin	
Order Mail To Customer Your password has been changed	
Your password has been reset	
🗉 🙀 Webshop Business Settings	Browse · Properties · Open Media Library · Edit Image · Clear · Refresh
<ul> <li>Product Repositories</li> <li>Layout</li> </ul>	Image [shared, standard value]:
Media Library     System	
System     E Templates	

- 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
```

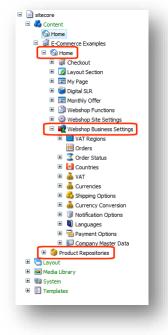
### 1.1.2 The Sitecore E-Commerce Content Tree

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 Services has a specific content tree structure.

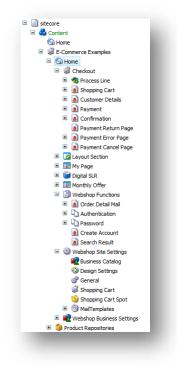


Three of the most important elements in the E-Commerce content tree are:

- 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.

#### **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 Services, see the SES Configuration *Guide*.



### 1.2 Editing Items in Sitecore

Sitecore has two tools that you can use to edit the items displayed on your website:

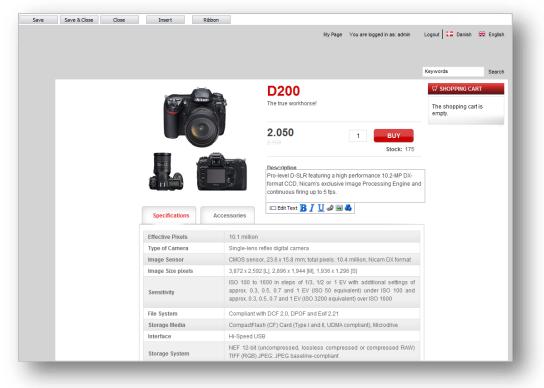
- The Page Editor
- The Content Editor

#### 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.

Edit - Insert from Template (1 of 1)	Copy To Sector To Delete Parte Copy To Delete Parte Copy Tables
e Edit Insert G	Operations Clipboard Rename Sorting C
th 🔍 👻	
i sitecore	
🗏 💑 Content	10 D200
S Home	O quick Info
E-Commerce Examples	Product Data
🗏 🔄 Home	
Checkout	Product Code [shared]: 1002
<ul> <li>Layout Section</li> <li>My Page</li> </ul>	1002
Digital SLR	Name [shared]:
Monthly Offer	uenue francole.
Webshop Functions	10
Webshop Site Settings	EAN (shared):
🗉 🙀 Webshop Business Settings	0-018208-252350
Product Repositories	
🗏 🎯 Master	SRU [shared]:
Accessories     Gameras	IMCNKD200
Cameras	
COOLPIX P60	Product Presentation
15 COOLPIX P80	-
COOLPEX S200	Title - Internal product name: D200
COOLPIX S520	12200
COOLPIX S700	Show Editor • Suggest Fix • Edit Html
[]]D200	allow could - adaptarta - countral
[[]] D 300	The true workhorse!
[[爾 D-40 [[爾 D60	
E Censes	
Brands	
🖻 🍋 Layout	
🗷 🖼 Media Library	
🗉 🔛 System	
Templates	
	Show Editor · Suggest Fix · Edit Html
	Description:
	Pro-level D-SLR featuring a high performance 10.2-MP DX-format CCD, Nicam's exclusive Image Processing Engine and continuous firing up to 5 fps.
ent Editor Media Library Workbox	

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 Services. 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 Services 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 Services, there are a number of pages that use different methods to specify which products are displayed on the website.



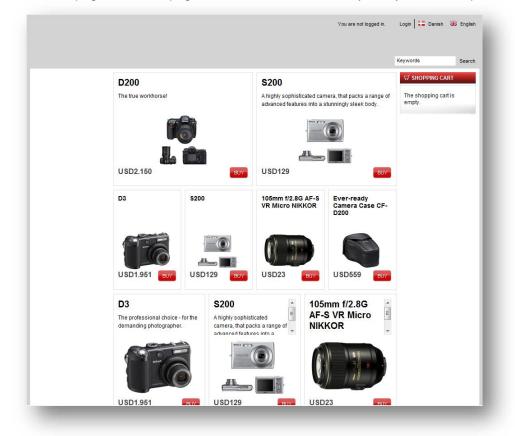
For example, the *Home* page always displays a list of products that are defined in the layout sections that is listed below it, and the *Cameras* page uses a search form to select the products that it displays.



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 sub items.

yve Edit ↓ Insert ©		Image: Copy To     Image: Copy T
arch 🔍 🔻	^	Content
isitecore     definition		□ Layout Section
Mome		A The current item does not contain any fields.
<ul> <li>Image: E-Commerce Examples</li> <li>Image: Good Home</li> </ul>		Quick Info
Constant Section     Cons	Ш	Item ID: {E78783CD-6088-4246-853F-2C0A8CA360A0} Item Name: Layout Section Item Path: /sitecore/content/E-Commerce Examples/Home/Layout Section Template: /sitecore/templates/User Defined/Ecommerce/Examples/Layout Section/Layout Section - {A8FB10FE-C7C5- Created From: [unknown] Item Owner: sitecore/admin
Webshop Business Settings Product Repositories		

Click the Two Column item.

h	Content
il sitecore	🔎 Two Column
Content     Gi Home	
Green Examples	Quick Info
🗆 🌚 Home	Col 1
🗉 🥔 Checkout	Product [shared]:
🖃 😡 Layout Section	sitecore/content/E-Commerce Examples/Product Repositories/Master/Cameras/D200
Street Two Column	
Four Column	Browse Properties Open Media Library Edit Image Clear Refresh
Three Column	Image (Image from product is used if this field is empty) [shared]:
Three Column Last	
Imi My Page     Digital SLR.	
E Cayout Section	
Cameras	
🕝 Layout Section	
Monthly Offer	
Webshop Functions	This media item has no details.
Webshop Site Settings	
<ul> <li>Webshop Business Settings</li> <li>Oroduct Repositories</li> </ul>	Title (Title from product is used if this field is empty):
G Layout	
Media Library	
🗉 😼 System	Description (Short Description from product is used if this field is empty):
Templates	
	Col 2
	Product [shared]:
	sitecore/content/E-Commerce Examples/Product Repositories/Master/Cameras/COOLPIX S200

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.

Sitecore® is a registered trademark. All other brand and product names are the property of their respective holders. The contents of this document are the property of Sitecore. Copyright © 2001-2014 Sitecore. All rights reserved.



To change the product that is displayed in **Col1**, in the **Product** field, click the drop-down arrow.

வ Home			
E-Commerce Examples	\rm Quick Info		۰
G Home	🗉 Col 1		8
Greckout	Product [shared]:		
Layout Section	sitecore/content/E-Commerce Examples/Product Repositories/Ma	ster/Cameras/D200	×
Two Column		G [none]	*
Four Column	Browse · Properties · Open Media Library · Edit Image · Clear · Refresh	sitecore	
Three Column	Image (Image from product is used if this field is empty) [shared]:	🖂 🚭 Content	
Three Column Last		Gil Home	-
📧 🎫 My Page		G Florine     G E-Commerce Examples	
🖃 🍘 Digital SLR		Gi Home	
I 🕑 Layout Section			
🖃 🎹 Cameras		OP Product Repositories	=
Layout Section		🗉 🏐 Master	
Image: Monthly Offer     Image: Monthly O		🗄 🍏 Accessories	
Webshop Functions Webshop Site Settings	This media item has no details.	🖃 🍏 Cameras	
<ul> <li>Webshop Site Settings</li> <li>Webshop Business Settings</li> </ul>		[] D3	
Product Repositories	Title (Title from product is used if this field is empty):	COOLPIX P60	
E Layout		COOLPIX P80	
Media Library		COOLPIX S200	
🗉 🗐 System	Description (Short Description from product is used if this field is empty):		
Templates		COOLPIX S700	*
		[] D200	
		10 D200	
		0000	<b>v</b>

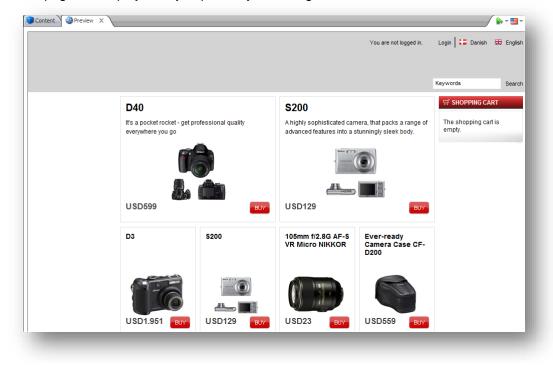
In the drop down list, select the product that you want to display in this column, for example the D40.

#### 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.





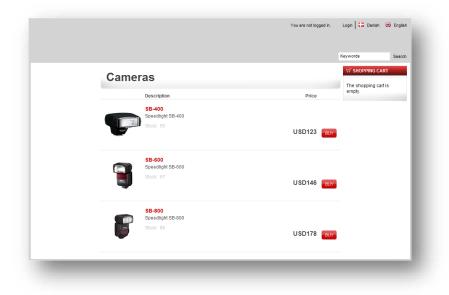
As you can see, pages that are constructed in this way show a static list of products that must be selected individually.

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

#### The Cameras Page

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

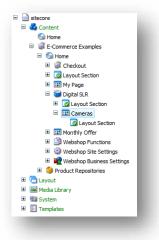
Currently the Cameras page looks like this:



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 sub items 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.

Home Navigate Review Analyze PL Dispert from Template (1 of 1) Save Edit Unsert Co	blsh Versions Configure Presentati Copy To Copy To Copy Duplicate Move To Delete - Operations	Cut Rename	Toobar ↓ Up ♣ First ◆ Down ♦ Last Sorting ₪			
earch 🔍 🔫	Product Page Content					
<ul> <li>is stacore</li> <li>is content</li> <li>is of Home</li> <li>is of Home</li> <li>is of Home</li> <li>is of Home</li> <li>is of Checkout</li> <li>is of Checkout</li> <li>is of Layout Section</li> </ul>	Search Product Code Brands @ Caron @ Nikon @ Olympus @ Panasonic Search		S8			
<ul> <li>Webshop Functions</li> <li>Webshop Site Settings</li> </ul>						
Webshop Business Settings	Product Code		ītle	Stock		Product Code
Product Repositories	2002		8-400	55		
🗉 🔁 Layout	2004		B-800	80		
B Media Library     B III System     Templates	2003	Nikon S	8-600	67		
					Add >	

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:

Search	Product Code				D				
	Brands								
	Canon Nikon Olympus Panasonic	4							
Search						Display products l	by selecting:	Results of sea	rch query 👻
ig a column	to this area to gr	oup by it.				Drag a column to this	area to group b	oy it.	
duct Code		Brand	Title	Stock		Product Code	Brand	Title	Stock
01		Canon	D3	123					
03		Nikon	D300	56					
05		Nikon	D40	21					
06		Nikon	D60	46					
08		Nikon	DK-17A	45					
02		Nikon	D200	175					
09		Nikon	DK-17M MAGN	0					
11		Nikon	Magnifying Vie	45	Add >				
14			Page	1 of 1 (8 items)				► Pag	= <b>1</b> of <b>0</b> (0 items)



- 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 are not logged in.	Login 🔚 Danish 🚟
			Keywords
Came	ras		SHOPPING CART
	Description	Price	empty.
	D3 The professional choice - for the demanding photographer. Stocic 123	USD1.951 BUY	
	P60 8.1 megapixel camera with traditional ergonomics for secure grip and reliable, superior performance. Features a 5x Zoom-NitKCR lens, Electronic Viewfinder, 2-5-inch LCD monitor, optical Vibration Reduction, high ISO, and EXPEED image processing concept. Temporarily out of stock	USD189 BUY	
	P80 Powerful 10.1 megapixel camera with outstandingly versalle NIKXOR wideangle 18 zoom lens, Macro mode, traditional-design ergonomics, electronic vewindinge, 2 7 inch LCD monitor, Vibration Reduction, high ISO and		

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.

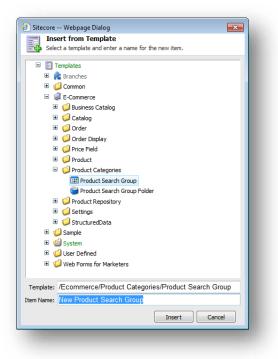
#### Note

The Monthly offer content item is now included in the *Sitecore E-Commerce Services Example Pages* package.

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

To create a new product category:

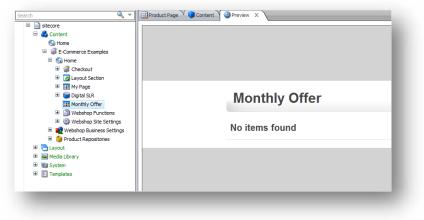
- 1. In the Content Editor, select the E-Commerce Examples/Home item.
- 2. On the Home tab, in the Insert group, click Insert from Template.



- 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.

□         Stocole           □	Search Product C Brands Cano Nixon Pana Search	n 🄶			R				
Webshop Business Settings     Operation of the settings     Operation of the setting of the	Drag a column to this are	a to group by it.			1	Display products		Results of sea	arch query 🔻
I Cayout	Product Code	Brand	Title	Stock		Product Code	Brand	Title	Stock
🗷 🚘 Media Library 🗷 🛃 System	2001	Nikon	R1	33					
System     Templates	3012	Nikon	Infrared	89					
a El templates	3007	Nikon	Remote C	200					
	3001	Nikon	Ever-rea	-11					
					Add >				

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:

- *Results of search query* the search results listed in the left-hand pane.
- *Manually picked products* the items that you pick from the search and add to the righthand 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:

	Description	Price	
	Ever-ready Camera Case CF-D200 Ever-ready Camera Case CF-D200		The shopping cart is empty.
	Temporarily out of stock	USD559	BUY
	Infrared Remote Control ML-3 Infrared Remote Control ML-3		
0	Stock: 89	USD19,99	BUY
	R1 Speedlight R1		
	Stock: 33	USD399	BUY
	Remote Cord MC-22 Remote Cord MC-22		

You can also change the display order of products from the product catalog. To change the sort order of products displayed on the *Monthly Offer* page:

- 1. In the **Content Editor**, select the **Monthly Offer** page.
- 2. In the ribbon, View group select Standard Fields.

	Home	Navigate	Review	Analyze	Publish	Versions
1	Conte	ent Tree	✓ Hidden It	ems 🗌 F	Raw Values	
/e	C Entire	Tree	V Standard	Fields	_	
ite	View	_				

- 3. On the Monthly Offer page, select the Content tab.
- 4. Select the **Products in Category** section.
- 5. Change the order of the products selected in the **Products in Category** section. Select *Remote Cord MC-22.*



6. Use the arrows to re-order the list. Move *Remote Cord MC-22* to the top of the products listed.

Search 🔍 🔻	Product Page Content		
sitecore     Gontent	Monthly Offer		
<ul> <li>Gontent</li> <li>Gontent</li> <li>Gontent</li> <li>Conmerce Examples</li> <li>Gontent</li> <li>Gon</li></ul>		Selected  Ever-ready Camera Case CF-D200  Infrared Remote Control ML-3  Remote Cord MC-22  Remote Cord MC-22	
	Product Details		•

- 7. On the ribbon, click **Save**.
- 8. Publish your changes.
- 9. Open the sample web pages to view the changes or if you already have the site open, refresh the page.

The Remote Cord MC-22 product should now appear at the top of the list of products.



### 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.

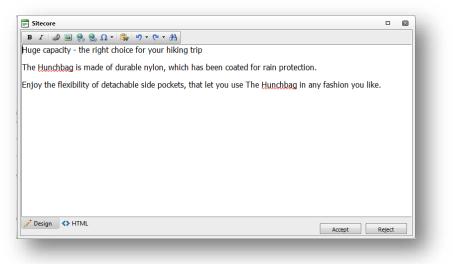
rdı 🔍 👻	Content
Gontent     Gontent     Gontent	Shore Editor - Suggest Fix - Edit Hanl Short Description: E-ver-ready Camera Case CF-D200
E Commerce Exceptes     E Commerce Exceptes     Product Reportings     Commerce Exceptes     Commerce     Commerce Exceptes     Commerce     Commercee     Commercee     Commerce     Commerce     Commercee     Commerc	Bow Edur - Suggest Re - EditMed     Besophare     Huge capacity - the right choice for your hiking trip     The Hunchbag is made of durable nylon, which has been coated for rain protection.     Enjoy the flexibility of detachable side pockets, that let you use The Hunchbag in any fashion you like.
Image: Second Secon	Images (stars():       Al       Images (stars():       Images (stars():       Images       Images<
	Brand [shured]: sitecore/content/E-Commerce Examples/Product Repositories/Brands/Nikon

#### 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.

rch 🔍 🔍 🔻	
initecore     difference     di	Description: Huge capacity - the right choice for your hiking trip
Ga Home ■ 🥥 E-Commerce Examples	The Hunchbag is made of durable nylon, which has been coated for rain protection.
Ga Home     Generation Product Repositories	Enjoy the flexibility of detachable side pockets, that let you use The Hunchbag in any fashion you like.
🗏 🍅 Master	Enjoy die nexibility of detachable side pockets, diat let you use the huncibag in any fashion you like.
Accessories Battery Chamber Cover BL-4	
Battery EN-EL3e	
Battery EN-BL5 DK-17A	Images [shared]:
DK-17M MAGNIFYING EYEPIECE     DK-17M MAGNIFYING EYEPIECE     DK-ver-ready Camera Case CF-D2D0     Infrared Remote Control ML-3	Al Selected Press C Ever ready Camera Case CF D200 Files C C
Lens Cap LF-1	
Magnifying Viewfinder DG-2	
Remote Cord MC-22 SB-400	
38-400 SB-600	
💘 SB-800	
The LightStrap	
The ToughStrap  Cameras	Brand [shared]: sitecore/content/E-Commerce Examples/Product Repositories/Brands/Nikon
🗷 🥥 Lenses	
Bill Brands     Cayout	Product Price
Media Library	Price [shared]:
<ul> <li>■ System</li> <li>■ Templates</li> </ul>	Shop:
地 🖭 Templates	Normalprice 559 Memberprice 549
	VAT [shared, standard value]:
	sitecore/content/E-Commerce Examples/Home/Business Catalog/VAT/Default

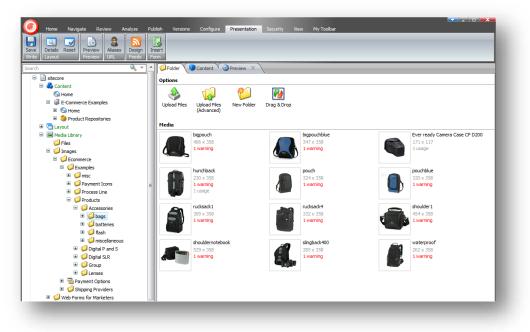
6. To use a different image, expand the images folder and scroll down to the image that you want to use and then click the arrow to move the image into the **Selected** field.

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:

Edit - Edit Insert 9	(1 d1) Duplicate (a) More To Defete Parts () Copy To () To	
h		× 1 <sup>×</sup>
itecore sitecore	E Specification	-
🖃 🛃 Content	Effective Pixels:	
Home     Gotter Examples	6.1 million	
<ul> <li>Image E-Commerce examples</li> <li>Image E-Commerce examples</li> <li>Image E-Commerce examples</li> </ul>		
Product Repositories	Image Sensor: CMOS sensor, 23.6 x 15.8 mm; total pixels: 6.3 million; Nicam DX format	- 61
🖃 🎱 Master		E
Accessories	Image Size pixels:	
🖃 🍏 Cameras I 🕅 D 3	3,008 x 2,000 [L], 2,256 x 1,496 [M], 1,504 x 1,000 [S]	
COOLPIX P60		
COOLPIX P80	Storage Media:	
COOLPIX S200	Secure Digital (SD)	
COOLPIX S520		
1個 COOLPIX S700 11個 D200	Interface: Hi-Speed USB	
100 D300		
[]] D40	Dimensions W x H x D:	
[] D60	Approx. 126 x 94 x 64 mm	
🗷 🍏 Lenses		
Brands     Layout	Show Editor Suggest Fix Edit Html	
🖿 🍋 Layout	Supplied Accessories: Rechargeable Li-ion Battery EN-EL3e, Quick Charger MH-18a, USB Cable UC-E4, Video Cable EG-D100, Strap AN-D300,	
🗷 🗐 System	LCD monitor cover BM-8, Body cap BF-1A, Evepiece Cap DK-5, Rubber Evecup DK-23, Software Suite CD-ROM (Supplied	
🗉 🗾 Templates	Accessories may differ by country or area)	
	Weight: Approx. 495 g without battery, memory card, body cap, or monitor cover	
		-
nt Editor Media Library Workbox		
ecore 🗧 😽 Content Editor		14:

On the other hand, the specifications for a bag are considerably less detailed:

	Copy To      Copy To	
dh 🔍 🤜	Content	↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓
Alterore     Alterore	Content Ver-ready Camera Case CF-D200  Content Ver-ready Camera Case CF-D200  Product Proce Product Presentation Product Presentation Product Presentation Secondation Secondation Secondation Secondation Genuine leather camera case to protect your camera during travelling.	
B Moda Lbrary     B Jostan     System     Content Editor     Moda Lbrary     Workbox tecore     Content Editor		<b>1</b> 4:3



# **Chapter 3**

# **Displaying Products**

This chapter gives you an overview of the layout sections and explains how you can use them in a Sitecore E-Commerce Services solution 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 Services 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 DMS, 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.

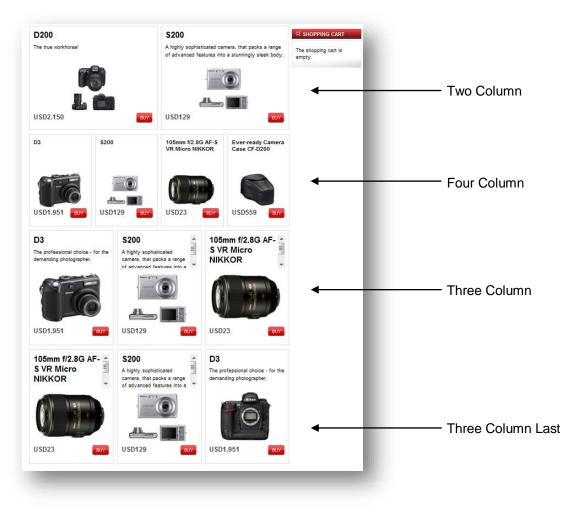
For more information about using Sitecore E-Commerce Services and the DMS, see the Sitecore E-Commerce DMS Cookbook.

### 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.

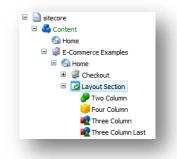


Layout	Description	Fields	Field Values
	Each column can rotate multiple images	Rotate Frequency1	Set the rotation speed — enter a numeric value.
		Sub item fields	To select the items to rotate, add them as sub-items below the Two Column Rotator.
		Image	Link to an image in the Media Library.
		Link	Insert 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.
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 *Col2*:

itecore	Sector Two Column
(a) Home	Quick Info
E-Commerce Examples	Col 1
🖃 🚳 Home	-
🗉 🚅 Checkout	Product [shared]: sitecore/content/E-Commerce Examples/Product Repositories/Master/Cameras/D200
Layout Section	sitecore/content/e-continerce examples/product repositories/master/cameras/b200
Two Column	Browse · Properties · Open Media Library · Edit Image · Clear · Refresh
🦊 Four Column	Image (Image from product is used if this field is empty) [shared]:
Three Column Last	
My Page	
Digital SLR	
Monthly Offer	
Webshop Functions	
🗉 🎲 Webshop Site Settings	
🗉 🙀 Webshop Business Settings	
🔳 🍏 Product Repositories	This media item has no details.
🗉 🕒 Layout	This includition has no actuals.
Media Library     System	Title (Title from product is used if this field is empty):
Garage System     Templates	Construction in the second sec
	Description (Short Description from product is used if this field is empty):
	E Col 2
	-
	Product [shared]: sitecore/content/E-Commerce Examples/Product Repositories/Master/Cameras/COOLPIX S200
	The content of the standing of
nt Editor Media Library Workbox	

The Two Column layout contains four fields for each column:

- Product
- Image
- Title
- Description



#### The Banner layout is simpler:

Banner	
Quick Info	Ŧ
Banner	Ξ
insert Link • Insert Media Link • Insert External Link • Insert Anchor • Insert Email • Insert . Li <b>nk</b> [shared]:	JavaScript · Follow · Clear
Rrowse · Properties · Open Media Library · Edit Image · Clear · Refresh mage (shared):	

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.

iearch 🔍	▼ Content
isitecore     Gontent	Two Column
🙆 Home	Guick Info
E-Commerce Examples	E Col 1
🖃 🙆 Home	-
🗉 🚅 Checkout	Product [shared]: sitecore/content/E-Commerce Examples/Product Repositories/Master/Cameras/D200
Layout Section	sitecore/content/e-commerce examples/Product Repositories/Master/Cameras/D200
Two Column	Browse · Properties · Open Media Library · Edit Image · Clear · Refresh
Four Column	Image (Image from product is used if this field is empty) [shared]:
Three Column	ange (ange non product pace n and near penper) (and ca)
Inree Column Last     Im My Page	
Imi My Page     Digital SLR	
Monthly Offer	
Webshop Functions	
Webshop Site Settings	
Webshop Business Settings	
Product Repositories	
🗉 🕒 Layout	This media item has no details.
🗉 🔚 Media Library	
🗉 📓 System	Title (Title from product is used if this field is empty):
Templates	1
	Description (Short Description from product is used if this field is empty):
	Product [shared]:
	sitecore/content/E-Commerce Examples/Product Repositories/Master/Cameras/COOLPIX S200
Content Editor Media Library Workbox	
United and Predictionary Workbox	



3. In the **Product** field, click the drop-down arrow, to see the content tree.

🖃 💑 Content	July Two Column	
🙆 Home	Quick Info	
E-Commerce Examples	Col 1	
🗏 🙆 Home	Product [shared]:	
	sitecore/content/E-Commerce Examples/Product Repositories/Master/Camera	as/D200
Two Column		(none)
Four Column	Browse · Properties · Open Media Library · Edit Image · Clear · Refresh	□ sitecore
Three Column	Image (Image from product is used if this field is empty) [shared]:	Gontent
Three Column Last		
My Page		G Home
🗉 🍘 Digital SLR		E-Commerce Examples
Monthly Offer		I 🔂 Home
Webshop Functions		🖃 🏐 Product Repositories 🗮
📧 🎡 Webshop Site Settings		🖃 🎱 Master
📧 🙀 Webshop Business Settings		🗄 🇐 Accessories
🗷 🇐 Product Repositories	This media item has no details.	🖃 🍅 Cameras
🗷 🔁 Layout	I nis media item nas no details.	10 D3
🗷 🔤 Media Library	Title (Title from product is used if this field is empty):	COOLPIX P60
🗉 🖏 System	The (The from product is used if this field is empty):	COOLPIX P80
Templates		COOLFIX F00
	Description (Short Description from product is used if this field is empty):	COOLPIX S200
	beschption (shore beschption nom produce is used it dils field is empty).	
		COOLPIX S700
		[]創 D200
		10 D300 +
	🗄 Col 2	
	Product [shared]:	
	sitecore/content/E-Commerce Examples/Product Repositories/Master/Camera	as/COOLPIX S200

4. Select a different product, for example a lens. 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 lens 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**.

105mm f/2.	8G AF-S VR Micro	\$200		f: Shopping Cart
NIKKOR 105mm f/2.8G AF-	S VR Micro NIKKOR	A highly sophisticated can advanced features into a s	nera, that packs a range of tunningly sleek body.	The shopping cart is empty.
A.				
USD23	BU	USD129	BUY	
D3	\$200	105mm f/2.8G AF-S VR Micro NIKKOR	Ever-ready Camera Case CF- D200	

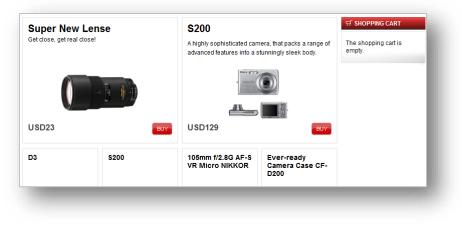
Sitecore® is a registered trademark. All other brand and product names are the property of their respective holders. The contents of this document are the property of Sitecore. Copyright © 2001-2014 Sitecore. All rights reserved.



As you can see, the *Home* page displays the lens 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 a 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

Fdit -	http://cms64rev110720ec/sitecore/shell/default.aspx?xmlcontrol=AddFromTempl 🏠	2
e Edit Insert 🕫	Insert from Template Select a template and enter a name for the new item.	ĵ
isitecore	E Templates	
🖃 💑 Content	🗉 😹 Branches	
🙆 Home	🗉 🤪 Common	
E-Commerce Examples	Generation     Generation	
🗉 🙆 Home	🗷 🥥 Sample	
🗉 🥔 Checkout	🗷 🕼 System	
🗉 🛃 Layout Section	User Defined	
My Page	Ecommerce	
🗉 觉 Digital SLR	🗏 🧐 Examples	
Monthly Offer	🗉 🧐 Function Pages	
Webshop Functions	🖃 🥥 Layout Section 📰	
🗉 🎲 Webshop Site Settings	Sector Column	
🗉 🙀 Webshop Business Settings	Three Column	
Product Repositories	Four Column	=
🗉 🔄 Layout	Banner	
Media Library	📝 Rich Text	Stock
E System	🎯 Rotating Banner	33
Templates	Rotator Item	55
E3 renputes	Stress Column Rotator	67
	🚾 Flash Banner	80
	💡 Rotating Flash Banner	123
	Ayout Section	-101
	Product Categories	30
	I i i i i i i i i i i i i i i i i i i i	-222
		6
	Template: /User Defined/Ecommerce/Examples/Layout Section/Layout Section	67
	Name: New Layour Section	
	Insert Cancel	-

- 4. Change the default item name to *Layout Section*.
- 5. Click Insert.
- 6. In the ribbon, click **Save**.

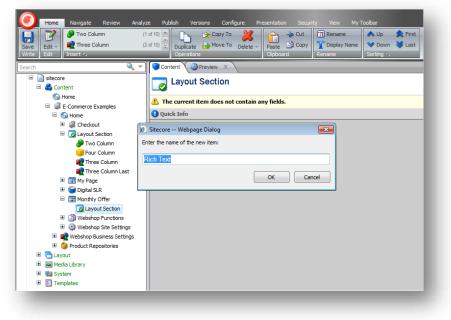
### Adding Layouts to a Layout Section

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 SES, 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.

Bome Navigate Review Analy:	e Publish Versions Configure Presentation Security View My Toolbar	
	County Cou	
Search	Content Preview X	× • • 1 •
□ □ sitecore □ 2 Content Content	Two Column Q quick Info	
<ul> <li>E-Commerce Examples</li> <li>Go Home</li> </ul>	E Col 1	=
Gheckout     Geckout     Geckout	Product [shared]: sitecore/content/Examples/Product Repositories/Master/Accessories/The Hunchbag	Product Repositories
	Browse · Properties · Open Meda Library · Edit Image · Clear · Refresh Image (Image from product is used if this field is empty) [bhared]:	
<ul> <li>Webshop Site Settings</li> <li>Webshop Business Settings</li> <li>Option Product Repositories</li> </ul>	This media item has no details. Title (Title from product is used if this field is empty):	Magnifying Viewfinder DG-2
8 (m) layout 9 (m) Media Lbrary 9 (m) System 9 (m) Templates	Description (Short Description from product is used if this field is empty):	SB-400 SB-600 SB-600 The Hundbeg The LubibStrap
	Col 2	8
	Product [shared]:	-
Content Editor Media Library Workbox		<b>5</b> 14:49

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.

Sitecore® is a registered trademark. All other brand and product names are the property of their respective holders. The contents of this document are the property of Sitecore. Copyright © 2001-2014 Sitecore. All rights reserved.



- 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:

			Keywords	Sear
Monthly C	Offer			
-	on special offer this month!			
To take advantag	e of this offer remember to create a	new customer account.		
Click here.				
			· SHOPPING CAR	T
			The shopping cart	is
Accesso	ry of the Week	Special Half Price Offer	empty.	
This awarding	winning backpack has just been	For a limited period we are offering this battery at	half	
added to our ra	nge at a special introductory price.	its retail price.		
	1 1			
USD499	BUY	USD19,99		
	Description	Price		
	Ever-ready Camera Case			
(T)	Ever-ready Camera Case CF-D	200		
	Temporarily out of stock	USD559 📕	BUY	
		-		

#### 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 and Customers**

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

This chapter contains the following sections:

- The Sample Checkout Process
- 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 DMS 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 about using the DMS with Sitecore E-Commerce Services, see the Sitecore E-Commerce DMS 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

0	2	3
CUSTOMER DETAILS	PAYMENT	CONFIRMATION

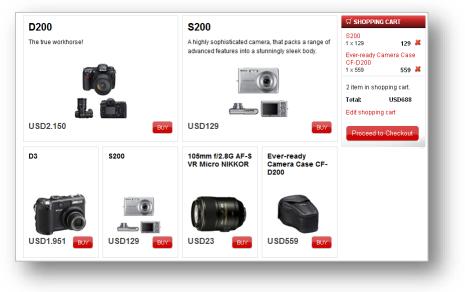
You can configure the checkout process by editing the text in the pages or by creating new pages.

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 Services.



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.

S200 List price: USD141,90	1 样	USD141,90	USD141,90
-	CF-D200 1 🗶	USD614,90	USD614,90
			USD12,99
	Total V	AT:	USD700,99 USD68,80 USD769,79
Update Cart	Continue Shopping		
	List price: USD614,90 DHL - USD12,99 ates (change your location)	DHL - USD12,99 ates (change your location) Total pr Total V/ Total pr	List price: USD614,90 DHL - USD12,99 ates (change your location) Total price excl. VAT: Total VAT: Total price incl. VAT:

- 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.

Customer Details	Existing Customer
Please fill in your name and billing address.	E-mail:
Name: * Address: *	Password: Forgot password
State: * v Zip: * City: * Country: * United States v	Log In
E-mail: *	
□ Create customer account.	

This page contains some forms that allow you to:

- Enter your personal details.
- Log in as a returning customer.

You can also:

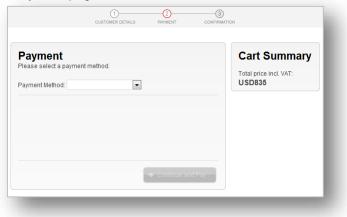
- Enter a different shipping address.
- Create a customer account.

This page contains all the forms that you need.

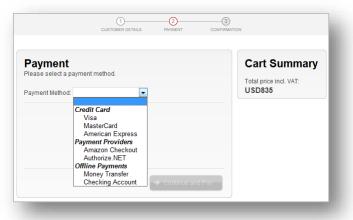
Custome	r Details	Existing Cu	istomer
Please fill in yo	ur name and billing address.	E-mail:	
Name:	*	Password:	
Address:	*		Forgot password
State:	*		Log In
Zip:	*		
City:			
Country:	* United States		
E-mail:	*		
🔽 Use a differ	ent shipping address.		
Name:	*		
Address:	*		
State:	*		
Zip:	*		
City:	*		
Country:	* United States		
Create cust	omer account.		
E-mail:			
Password	*		
Confirmation	*		
	Continue check out		



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.

Payme			Cart Summary
Please selec Payment Met	t a payment method. hod: Visa		Total price incl. VAT: USD835
Payment typ	oe: Visa		
	Card Number		
VISA	Month / Year	1	
	CID	0	

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.

rnank you tor placi	ing an order.				
Order Number	: 2577				
Name:	Mr. Test	Name:		Mr. Test	
Address:	Test St.	Address		Test St.	
Zip, City: State:	1234, Test City	Zip, Cit State:	y:	1234, Test City	
Denmark	Country:	Denmark	c c	Country:	
Products					
3001	Ever-ready Camera Case CF List price: USD68.625	-D200	1	USD68.625	USD68.625
5001	\$200		1	USD14.875	USD14.875
	List price: USD14.875				
Shipping Method:					USD0
			Total	orice excl. VAT:	U SD668
			Total V		USD167
			Total J	price incl. VAT:	U SD835
Info and Status					
Notification:	Email, test@test.it				
Order Number:					
Order Date: Status:	8/24/2010 8:30 PM New				
status: Transaction	IVEW				
Number:					

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.

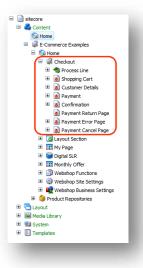
#### 4.1.2 Customizing the Checkout Process

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.

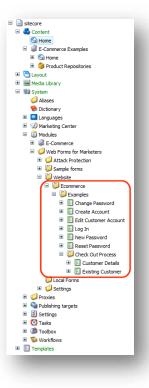


To customize the checkout process you need access to the following Sitecore components:

• 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 checkout 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 Services, see the SES Configuration Guide.

Sitecore® is a registered trademark. All other brand and product names are the property of their respective holders. The contents of this document are the property of Sitecore. Copyright © 2001-2014 Sitecore. All rights reserved.



# 4.2 Managing Customers

In the E-Commerce Services, 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.

#### 4.2.1 Registered Customers

Registered customers are site visitors who have created a customer account and provided their customer details. This makes the checkout 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.

Justome	Details		Welcome Mr.
lease enter yo	ur personal details.		Test.
Name:	* Mr. Test		
Address:	* Testing St.		
State:	*	•	
Zip:	* 12345		
City:	* Test City		
Country:	* Bouvet Island	•	
E-mail:	* test@test.it		
Use a differ	ent shipping address.		

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.

	🖬 Change Pas 👸 Reset Setti	• •	Roles Domains Security	Access Viewer Security Editor Tools	<ul> <li>Serialize User</li> <li>Serialize</li> <li>Revert User</li> <li>Revert A</li> <li>Serialization</li> </ul>	
Drag a column to this a	rea to group by	/ it.			2	Search:
User Name	Domain	Fully Qualified Name	Full Name	Email	Comment	Language Locked
🊨 Anonymous	default	default\Anonymous				
🊨 Anonymous	extranet	extranet\Anonymous				
ଌ reg@register.it 👘	extranet	extranet\reg@register.it	extranet\reg@regis	ter.it reg@re	gister.it	
🚨 test@test.it	extranet	extranet\test@test.it	extranet\test@test	.it test@te	st.it	
admin 🕹	sitecore	sitecore\Admin	Administrator		Sitecore Administrato	or
						Page 1 of 1 (5 items)

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*.

S Edit User	
Edit the information about the user.	
	-
General Member Of Profile Language Settings Information	
User Profile	
Start Url:   Default	
Content Editor	
Page Editor	
Preview	
Desktop	
O URL:	
different Branner Kann	
Additional Properties:	
Billing Address Zip:	
1234	
Billing Address:	E
Register St.	
E-mail 2:	
E-mail:	
reg@register.it	-
Change	

### 4.2.2 Unregistered Customers

If a customer chooses not to create a customer account when they make 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*.

Sitecore® is a registered trademark. All other brand and product names are the property of their respective holders. The contents of this document are the property of Sitecore. Copyright © 2001-2014 Sitecore. All rights reserved.



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.

#### 4.2.3 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.

		My Page	You are logged in as: reg@re	gister.it I	Logout 📔 🖬 Danish	English
					Keywords	Search
Order Hist	orv					
s placed by you:	-					
	Order Date:	Items:	Total Price:			
Order Number:						
2583	25.08.2010	2	1948650	Details		
	25.08.2010 25.08.2010	2	1948650 1309	Details Details		
2583						

2. Select one of the orders and then click *Details* and the *Order Confirmation* page associated with that order appears.

					Keywords	Search
Order Deta	ails					
Name: Address: Zip, City:	Reg Cust Register St. 1234, Reg City	Name: Address: Zip, City:	Reg Cust Register St. 1234, Reg City			
State: Country:	Antarctica	State: Country:	Antarctica			
5001	S200 List price: USD1.309	1	USD1.309	USD1.309		
Shipping Metho						
				USD0		
		Total V	orice excl. VAT: AT: price incl. VAT:	USD119 USD11,90 USD130,90		
nfo and Status						
Notification: Order Number:						
Order Date: Status: Transaction Number:	8/25/2010 11:56 AM New					
Number:						
Print this Page	Continue Shopping					



# 4.3 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.

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

Sitecore E-Commerce Services 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

### 4.3.1 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

istecore     definition	New User Confirmation
🔄 Home	Quick Info
E-Commerce Examples	
🗉 🙆 Home	Item ID: {9E097DCB-C234-4E86-89E5-79766D5A7907}
🗉 🥥 Checkout	Item Name: New User Confirmation
Z Layout Section     My Page	Item Path: /sitecore/content/E-Commerce Examples/Home/Site Settings/MailTemplates/New User Confirmation
🐨 🎞 My Page 📧 🎬 Digital SLR.	Template: /sitecore/templates/Ecommerce/Settings/Mail Template - {D21A3FBA-DCC2-429F-8301-03122C9F5F1C}
Gigital SER     Monthly Offer	Created From: [unknown]
Webshop Functions	Item Owner: sitecore\admin
Webshop Site Settings	Item Owner: sitecore admin
Business Catalog	🛃 Data
Obsign Settings	From [shared]:
@ General	no_reply@sitecore.net
Shopping Cart	
쒈 Shopping Cart Spot	To [shared]:
MailTemplates	{CustomerEmail}
Contact Us	
New User Confirmation	Subject:
📄 Order Mail To Admin	Congratulation! Welcome to our site.
Order Mail To Customer	
Your password has been changed	Show Editor • Suggest Fix • Edit Html
Your password has been reset Reset your password	Body:
Webshop Business Settings	Thank you for creating a customer account with us.
Product Repositories	
Layout	Username: {UserName}
Media Library	
🗉 🧾 System	

- 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. 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.



# Chapter 5 Appendix

This chapter contains the following deprecated sections:

- Managing Orders .
- Searching for an Order

Sitecore® is a registered trademark. All other brand and product names are the property of their respective holders. The contents of this document are the property of Sitecore. Copyright © 2001-2014 Sitecore. All rights reserved.



# 5.1 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.

#### 5.1.1 Storing Orders

Customer orders can number in the thousands so using structured data provides a logical way of keeping track of all your orders.

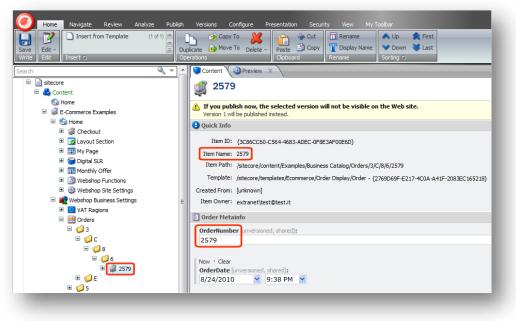


To find an individual order manually, you need to drill down through several sub-folders. The labeling of these folders conforms to the following naming convention:

• 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.



# 5.2 Searching for an 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.

ve Edit → Insert For Template (1)	of 1)	Clipboard Rename	Up Sire     Vous Sorting Di			
ch	Search order II Status Search order II Status Search Search	Notification	Payment Amazon America Authori Checkir	an Express 🗉 🔲 Fedi	Ex E	
Webshop Site Settings Webshop Business Settings	Drag a column to this ar	ea to group by it.				
VAT Regions	Order Number	Date	Status	Customer Name	Notification	Payment
= 🔣 Orders	2577	24-08-2010 20:30:37	New	Mr. Test	Email	Money Transfer
= 💋 3	2578	24-08-2010 21:37:45	New	Mr. Test	Email	Money Transfer
🗉 🧔 c	2579	24-08-2010 21:38:25	New	Mr. Test	Email	Checking Account
	2580	24-08-2010 21:39:20	New	Mr. Test	Email	Checking Account
= 🗐 s			New	Mr. Test	Email	Checking Account
□ 10 8 □ 10 6 ■ 2579	2581 2582	24-08-2010 21:40:04 24-08-2010 21:43:43	New	Mr. Test	Email	Checking Account

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.

sitecore	Search 1004		
A Home	Status Author Captur New Pendin Proces	red E-mail	Payment Checking Account Money Transfer
a     vector up business sectings       a     websine public tess sectings       a     a       b     condens       b     condens       b     condens       b     condens       condens     condens	Order Number 1004	Date 08/24/2011 14:49:31	Status New



3. 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.

Sitecore - Sitecore Content Editor Webpage Dialog			×
Data		Ξ	<u>^</u>
Comment [unversioned, shared]:			
		~	
			E
		-	
BillingName [unversioned, shared]:			
Mr. Test			
BillingName2 [unversioned, shared]:			
BillingAddress [unversioned, shared]:			
Test St.			
BillingAddress2 [unversioned, shared]:			
and a solution of the coll			
BillingZip [unversioned, shared]:			
1234			
1251			
			T
		-	
	OK	Can	cei

You can edit this information if you need to amend the order.

#### Тір

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.

Insert from Template       Insert from Template       Edit √       Insert 10	(1 of 1	))
31 🔍 👻	1	Content
isitecore     document     document     document     document		<ul> <li>2581</li> <li>A If you publish now, the selected version will not be visible on the Web site.</li> </ul>
E-Commerce Examples		Version 1 will be published instead.
Home Webshop Business Settings		Quick Info
VAT Regions		Order Metainfo
Orders		OrderNumber [unversioned, shared]:
🐨 🥥 3		2581
I 🧔 5		
🖃 🥥 D		Now ' Clear
III 🥵 🗉 🗉		OrderDate [unversioned, shared]: 8/24/2010 9:40 PM 9
= ØE		8/24/2010 ¥ 9:40 PM ¥
<b>□</b> 🧐 7		Status [unversioned, shared]:
□ 0 2 ■ 0 2581	Ε	sitecore/content/Examples/Business Catalog/Order Statuses/Processing
🗉 🌋 Order Status		TrackingNumber [unversioned, shared]:
Countries		
🗄 🍊 VAT		
<ul> <li>Currencies</li> <li>Shipping Options</li> </ul>		TransactionNumber [unversioned, shared]:
Grind Currency Conversion		II
Image: Imag		PaymentSystem [unversioned, shared]:
Languages		sitecore/content/Examples/Business Catalog/Payments/Checking Account
🗉 🔁 Payment Options		steers of entering and provide and a calculary in a finance, and a fing Account
Company Master Data		Currency [unversioned, shared]:
Product Repositories		sitecore/content/Examples/Business Catalog/Currencies/USD

Sitecore® is a registered trademark. All other brand and product names are the property of their respective holders. The contents of this document are the property of Sitecore. Copyright © 2001-2014 Sitecore. All rights reserved.