Introduction

Hello and welcome to our CSR tutorial for HCL Commerce. In today's tutorial we are going to walk through how you can use our brand-new Customer Service Hub application to perform some typical tasks of a customer service representative. In this exercise, we will show you how you can use this new application to quickly and efficiently respond to a customer's issue and correct it without the need for IT intervention. As we walk through this tutorial, there a several key points that we'd like you to focus upon.

First, please note that this tutorial is being run on an HCL Commerce environment deployed within the revolutionary new HCL SoFy cloud deployment application. This powerful application allows you to have a fully function HCL Commerce environment up and running in under 20 minutes. Next, as we are using the new Customer Service hub, take note that this is a stand-alone application that can integrate seamlessly with any storefront without the need to add special coding to your pages. And finally, please note that everything we are demonstrating here today is utilizing the out of the box native APIs that are delivered with HCL Commerce.

Now that we've laid out the foundation for what we will be demonstrating in this tutorial, let's head over to our SoFy solution console and start showing you what can be done with this new Customer Service Hub.

Step 1 – Create Environment in SoFy

To begin this tutorial, we are going to start off by actually creating our HCL Commerce environment within SoFy. Once you have logged into the SoFy environment, click on Catalog at the top and find the tile for HCL Commerce. Click on the tile and you'll be taken to a page that lists out some information on the solution. This is a great reference for information on the accessing the environment as well as a great reference point for the APIs that are available. Once you are ready, go ahead and click on the Add to Solution button on the top left of the screen. This will open up the solution panel on the bottom of page and allow you to input the details for your actual environment. For this particular instance we are going to name it comm-v91-csr, we will leave the version number the same, and then for the description we will simply type "HCL Commerce v9.1.x CSR Demo". Once this information looks good, click on the create button to being the process for setting up the new environment. The creation process takes about 30 seconds and then you will be taken to the solution information details page. From here, we need to deploy our solution to a sandbox so we will select "Deploy in Sandbox" from the link at the top of the page. This process takes about 20 minutes to load and configure all the required parameters for a fully functioning HCL Commerce environment. You'll know it is ready to go when the status changes from "In Progress" to "Deployed". Once deployed, take note of the credentials shown here and then click on the "View Solution Console".

The solution console provides you will all the details and information about your deployed HCL Commerce applications. For today's tutorial we aren't going to focus all the deployment details so let's click on the "General Information" and we will be taken to a screen which provides us all the details we need to access our HCL Commerce application. We have links to the HCL Commerce Management center, the Emerald and Sapphire storefronts, as well as details about access the APIs and log files.

Step 2 – Create New CSR User

Before we can start showing the power of the Customer Service Hub, we first need to do a few setup tasks. To do this, we will need to go into Management Center. Take note of the credentials listed in the entry for Authoring Management Center and then let's click on the Open Link button on the right. This will take us to the login screen where we can enter the credentials and login. Once in management center we are going to go to the menu in the upper left and then select Workspace Management. Next go to File and select "Work on Approved Content". This will allow us to make changes to the website and have them show up immediately. Now we can go in and create the new CSR user that we will be using for the rest of this tutorial. To do this we go to the menu and select Manage Organizations and then Users. This will take us to a listing of all the users on the site and from this screen we will click the New button on the top right. Now we simply use the wizard to fill out all the required information for the new CSR user. Be sure to take note of the login ID and credentials as we will be using this shortly. Once this is done, click next to be taken to the contact information section. Here you can use whatever information that you'd like for your user. Once you have completed this section, click on Next and we'll finish up with assign the proper roles the user. We are going to be using the Root Organization for this demo so start by typing Root in the Organization box and then select Root Organization when it appears the dropdown menu. Next we need to assign two roles to this user. These are both customer service roles so you can enter Customer in the available roles box and you'll be shown two possible selections. Select Customer Service representative from the drop down and then repeat this process to select Customer Service supervisor. Click next to be take to the final section. We will not be assigning any roles to this user so simply click on finish to complete this process. You've now created a brand new CSR user and it should be showing up on the list of available users.

Step 3 – Modify Current Promotion

For the next part of the setup in this tutorial, we need to make a small modification to one of the current promotions that are on the site. This will be used for our customer service scenario where we are going to be helping a customer that is having an issue on the website. Go to the menu and click on promotions. Verify that you are in the EmeraldSAS store and then select promotions on the left side of the screen. Here you will see a listing of all the promotions currently available on the website. To make things a little easier, we are going to disable all the promotions. To do this, click on the last promotion and then hold shift and click on the first one. This will select all of the promotions at one time. Now do a right click on any one of the promotions and select deactivate. Once all the status boxes have turned red, we can now modify the appropriate promotion. Double click on the first promotion called “Bedroom Category Promotion” to view its details. Right now, this promotion is set to give 20% all the items in the bedroom category. What we are going to do as add a product exclusion for a Twin Bunk Bed to this list so that all but this one item will be able to receive the discount. Scroll down to the purchase condition and reward section and find the area called excluded catalog entries. Since we don’t know the exact partnumber of the item we want to add, we are going to use a powerful feature in management center which allows us to browse the catalog and find the desired item. Click on the arrow button to open the sidebar and then select browse at the top. We need to browser the master catalog categories so select that from the drop down then navigate down from EmeraldCAS to bedroom and then beds. Now we are giving a list of all the available products. We are pretty sure that it is the BD-BEDS-0001 item is what we need to add, but to be sure we can double click on the entry to get more details. The details tell us that this is the Twin Bunk Bed and that is the item we need to exclude from the promotion. Now that we’ve confirmed this is the correct item, we can click close and then simply drag and drop the entry over into the exclusion list. That was all that needed to be done to add the product exclusion so we can now click on close to be take back to the promotion list. The last thing we need to do is to activate this promotion so that it is available on the website. To do this right click on the entry and select Activate from the menu. We’ve now completed all the setup steps required for this tutorial so lets jump back in the SoFy solution console and talk a little more about what we are going to be doing here today.

Step 4 – Customer Discount Issue

For this scenario, we are going to show how a CSR can use the new Customer Service Hub to assist a user that is having trouble on the website. Let first show the scenario from our customer’s standpoint and then we will see how our CSR is going to use the tooling to hopefully save the sale. As we jump into the Emerald store by clicking on the Open Link button, we are will be acting as a new customer that has just received an email letting them know that if they register on Emerald and purchase something from the Bedroom category, those items will be 20% for a limited time. Our customer thinks this is a great deal since they are in the market for some bedroom furniture, so they take a quick look at the home page and go right to the sign in and registration page. Since they are new to the site, they click on Register Now and are presented with a screen to enter some basic registration information. Once they complete this form, they simply click Complete Registration to complete the process. They are taken back to the home page and now are able to navigate to the bedroom category by selecting the Bedroom category. They then click on Beds and are given a few very nice beds to choose from. Our customer is interested in the Sleepy Head Elegant Queen Bed so they click on the item to get some more details. This item looks really nice and they see that it shows the 20% discount is applicable so they add it directly to their cart by simply clicking the add to cart button. Realizing that this is a really great deal, they decide that their kids could use a new bunk bed and decide to navigate back to the beds section and look at the details on the bun k bed they saw earlier. This looks exactly like what they need and the page here shows that the 20% off discount is applicable for this item as well so out customer quickly adds this item to the cart. Wanting to take advantage of this great savings the customer clicks on the shopping cart button to start the checkout process. As our customer starts to look through the cart page, something looks a little off to them. They see the discount is $250 which is great, but if it is 20% off the bedroom items, that doesn't seem right. With a subtotal of about $1800, the discount should be closer to $360, not $250. Unsure of what is going on here, out customer goes back to the Sleepy Head bead and verifies that the discount is listed there and it is. And just to be sure, they also go back and check the bunk bed and see that it is indeed showing the 20% discount as well. They go back to the cart to check everything one more time and the discount is still showing as being a lot less than expected. At this point, our customer is somewhat frustrated and decides to reply to the email they received letting them know about the discount to let the store know that something doesn't seem right with the site.

Step 5 – CSR Reviews Website as Customer

Now that we've gone through the customer's journey, lets now show the journey that our CSR user will take to help resolve this issue for our customer. Our CSR has just received the email letting them know about the issue so they decide to user the customer service hub to investigate this a little further. At this time, the SoFy console does not have a direct link to the Customer Service Hub so we are going to copy the link to the Emerald home page and simply replace the "Emerald" at the end of the link with "CSR" and we will be taken directly to the logon page.

Here we will login using the CSR user information that we created at the beginning of this tutorial. Once logged in, we need to select the Emerald store and then we are able to go to either the account management or the order management section of the hub. Since we are looking to help address the issue for our customer, we must first access the customer's account by clicking on customer search and then entering in the login ID in the first search box. In our case, the login ID is the same as the email address so once we have entered that information we click search. Now we are presented with the results of the search and we can then click on actions to retrieve the customer details. Here you can see we are presented with the basic information that is known about the customer and on the top right of the screen there is a button that says "Shop for this customer". This action allows the CSR to impersonate the customer and view the site exactly how the customer would see it. Once we click on this button you can see that the CSR is taken directly to the Emerald home page and in the top right of the screen you can also see the indication that we are shopping as "Test User" which is the name of our customer. The CSR then selects the cart icon and clicks on view cart to be immediately taken to the shopping cart page where they can now investigate the promotion discount issue that was presented. The CSR sees that the discount appears to be applied, but as the customer indicated, it looks less than what would be expected. Since our CSR is unfamiliar with this discount, they lookup the details and see that there is an exclusion on the Twin Bunk Bed and that is why the discount is less than expected. The customer said that both items showed up as having the discount available so out CSR now clicks on the Twin Bunk Bed and is taken to the product details page when they immediately see that there is a message indicating that this item is part of the promotion. A quick check of another item on the site seems to indicate that this promotion messaging is likely incorrect and something that needs to be address with the development team. For a short term fix, the CSR goes back to the cart and attempts to remove the twin bed from the cart. They are presented with a message indicating that the order is not locked and asks if they would like to continue. Since the CSR was not the one that originally created the order, they need to select yes to unlock the order and then click delete again to complete the action. Once the change is accepted the CSR sees that the discount stays the same which confirms that there is an issue with the promotional messaging on the website.

Step 6 – Add Order Comments

The next step for our CSR is to make some comments on this order so that anyone else looking at the account can see what was done and then they can get back to the customer to explain the issue. To do this, the CSR starts by clicking on the Shopping as" area and then selecting Switch Customer Account. This takes the CSR back to the Customer Search page where they then click "Back to Landing Page" to get back to the main landing page. Here we will now go into the order management area by clicking on the order Search Button. We know the customer's login ID is their email so the CSR enters this information and clicks search to find the customer's order. Clicking on actions and then view order details takes our CSR to the order details page where there are several options for what can be done next. Here the CSR can see the order details clicking on the slider button and confirms that the order now only has the single item in the cart. They then click on Add a new comment to open up a text field where the CSR then indicates such things as exactly what was done and if there are any needed follow ups required on this order. In this case, the CSR is commenting both on what they did in fixing the customer's order and also what the following needs to be with the marketing and development teams to ultimately correct the issue. Once they click save you can then see that the comment has been attached to the order and the only thing left to do is unlock the order so that the customer can now finish with their purchase.

Hopefully you can see just how powerful the Customer Service Hub can be for our CSR users. One of the great things about the HCL Commerce solution is that not only is this available on the web, but everything that you saw here today can also be done directly using APIs. This means that for whatever application you are using behind the scenes, the APIs can be called and all the same tasks performed. Lets take a quick look at how this can be accomplished using the Postman tool.

Step 7 – Perform CSR Tasks with APIs

Start by opening postman and importing the environment and collection files that we will use to completed this process. Select the environments section from the left side and then click on import. From here, either drag the "HCL Commerce SoFy CSR Demo.postman_environment.json" file to the workspace or use the tool to find it's location. Once selected, click the Import button. We need to make a few changes to this default file to connect to the new instance we created so to do this simply click on the "HCL Commerce Sofy

CSR Demo entry and it will load the configuration information. The first thing we need to do is replace the astrisks in the sofy-hostname entry with the numeric value shown in the sandbox details section of the solution details page. Next, verify that the csrUserId and csrPassword values are the same as what was created during the tutorial. If yours are any different, simply update as required. And finally, update the customerEmail field if necessary, to be the name of the customer that was created during the tutorial. In our case, we created a separate user for just the API testing so we've updated this as required already. There are a couple of fields that we will leave empty as they will be populated by the API calls themselves. Once all of this is done, click on save.

Next we need to import the collection file into Postman. On the left side of the window, click on collections and then click import. As we did with the environment import, either drag the "HCL Commerce SoFy CSR Demo.postman_collection.json" file to the workspace or use the tool to find it's location and click import. We are now ready to run the APIs which will allow us to see much of what was done in the Customer Service Hub be done with simple API calls. Within the collections area, expand out the HCL Commerce SoFy CSR Demo selection to show the individual APIs. Click on the first API called "Find customer by logonid". Before we can run these APIs, we need to load the environment information. On the top right, change the environment dropdown selector from "No Environment" to "HCL Commerce SoFy CSR Demo. Run the Find by customer logonid API now by clicking on the send button. This API is designed to return all the customer details that is known based on the logonID. As you can see from the result, there is a lot of customer information that is available using this API. This API will automatically save the customerId value to the environment variable we loaded previously in order to make it easier to call the next API. Select on the Update customer details API next. This is a PUT API that will update the customer record with the details that you provide in the body section of the call. To see the default details we provided, click on the body section. You can update or modify any of these value and the a full list of all the potential values you can use is provide in the API reference section of the HCL Commerce help center. Once everything looks good, click on Send to process the update. You will know the update is successful when the call returns the viewTaskName, userID, and addressID values. Let confirm that these values were loaded by running the Find Customer by LogonId API again and looking at the results. As you can see, the country, city, and zip code along with the other values are now showing the updated information. The next API we are going to run is going to allow us to get all the orders for a customer. Click on the Get Customer Orders API and click send. Here you can see that there is currently one order for this customer and we are able to see some basic information about the order. The orderId that was retrieved here has been loaded into the environment variables so that we can easily use it for the next API call. For this call let's select on the Get order Details API and click send so that we can get more information about the order we just saw. Here you can see there is even more in-depth information available regarding the order that is provided by this simple API call. We are even able to see any discounts that have been added to the order from the result.

Now that we've found our customer, updated the address info, and retrieved a lot or order information, let's do one final task to show the power of this API framework and add a comment to the current order. First lets see if there are any comments on the order already by clicking on the Get Order comments API and hitting send. As you can see there are no comments associated with this order so we'll now click on the Add Order Comment API to add one ourselves. Just like with the Update Customer details API, this is another PUT call that requires us to pass information in as part of the body in the call. Click on Boy to see the default comment that we created and then click Send to update the order with this comment. You'll know it's successful when the APU returns the orCommentId and submitFInshMessage values. Let's confirm the order was updated with the comment by running the Get Order Comment API once again and you can easily see that the comment is now a part of this order as well as some additional details on who created the order and when it was created.

Conclusion

Now that we've completed this tutorial, let's go back and visit those key points I asked you to take note of at the beginning and discuss why they are important. First, the deployment process from within HCL SoFy allowed us to create a fully functional sandbox environment within a matter of minutes rather than days or weeks that it would typically take to make a request for IT to create an environment for you. Not only does this allow you to do tutorials and other learning activities such as we completed today, it also allows users to preview the latest features and functionality with an protected environment without the time investment and costs typically required to stand up a new environment. Next, remember that everything we did using the customer Service Hub today was performed in an application that was completely isolated from your front-end website. No code to add to your page or updates to make it work. Simply access the Customer Service Hub URL and you are all set. And finally, by showing that all the CSR functionality we performed today was available in APIs, you now have the flexibility to integrate CSR functionality with any external application and not be locked into one particular application or method of interaction.

Thank you again for taking the time to go through this tutorial. We hope that you found this information useful and that you can use it to help improve the capabilities of your HCL Commerce implementation.