Sterling Web™

Overview Guide

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Sterling Commerce

An IBM Company

Contents
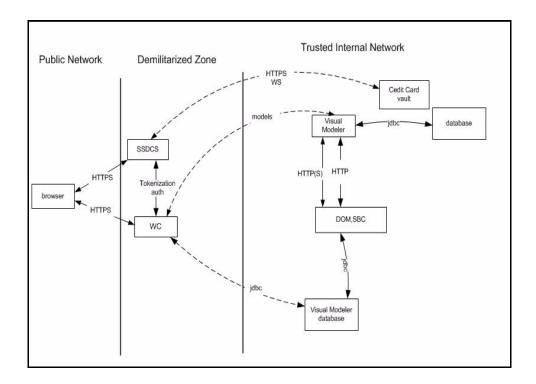
Overview of Sterling Web

Sterling Web is one of the channels on which the Sterling Selling and Fulfillment Suite™ can be deployed. Sterling Web enables a user to launch and manage multiple Web storefronts, enable self-service in the context of placing orders, and assist sales and service representatives with guided selling tools. These tools, which include product selection, comparison, detail, and configuration tools, help your customers and partners locate and compare products. You can also create a personalized buying experience, using which your customers and partners can place orders based on their previous orders.

You can use Sterling Web to increase direct sales by building any number of branded Web storefronts, and indirect sales by providing complete e-business capabilities to your channel partners.

The architecture of the Sterling Web application is illustrated in the following diagram:

Business Challenges

Though e-commerce has outperformed traditional businesses in many ways and has resulted in efficiency of business, intelligence of the system, and availability of products, it continues to face certain challenges in a highly competitive market segment, which hinders the cross-channel execution for sales, order fulfillment, and service support. Following are a few such business challenges that Sterling Web can address:

- To penetrate new markets, companies must target different customer segments and support multiple brands or product lines.

- Risk of losing customers to the competitors if globally-distributed customers cannot quickly locate the right product or service.

- Cross-channel integration between a Web site, store, distribution center, call center, and suppliers.

- No matter which channel an order is placed in, customers expect the inventory information they view to be accurate, their orders delivered to the correct address, and the promised delivery dates met.

- To minimize fulfillment costs, customers' orders must be captured accurately and fulfilled as accurately as possible. For example, a retailer may want products sourced from the optimal ship nodes and the shipments to be consolidated in order to minimize costs.

- Companies must be able to handle exceptions quickly and smoothly. Customers should be able to request modifications of orders even after they are placed.

- Because an order can be entered by anyone with access to the corresponding Web site, companies must protect themselves from fraudulent orders. The addresses entered by a customer must be validated to ensure correct delivery.

Sterling Web helps overcome these business challenges with the following features:

- Storefront branding - Each storefront administrator can manage the look and feel of a storefront through style sheets and logo uploads.

- Catalog and guided selling - Companies can use the master catalog to access complete and accurate product information. A catalog can be configured to contain only those products that an enterprise or a partner storefront is entitled to sell, and display customer-specific pricing from the storefront owner. Sterling Web also provides access to all your guided selling tools such as product selection, comparison, detail, and configuration tools.

- Order self-service - Customers and partners can place orders, and perform post-order service transactions, including key commerce functionalities such as multiple shopping cart modes, availability check, and store-pickup.

Sterling Web Features

Sterling Web™ provides various features that enable enterprises to sell their products directly to customers and partners through e-commerce Web sites. Customers and partners can browse the product catalog, add products to their cart, verify the prices of products and their availability, view promotions and special offers, and place orders.

The following features of Sterling Web are briefly explained in this topic:

- Profile Management
- Catalog
- Cart and Order Management

Profile Management

Sterling Web enables buyer users to manage the details of their own organization and the corresponding child organizations. Additionally, buyer users can manage their own details and the details of other users who belong to the same organization. This section briefly explains the features that Sterling Web provides to manage organization and buyer details.

Managing Buyer Organization Details

A buyer organization is an organization that purchases products from a storefront. After a buyer organization is created, buyer administrators belonging to that organization can view the details of that buyer organization, update the details of that organization, create child organizations, or update the details of the child organizations. For example, if the address of a child organization has been modified, a buyer administrator, who is a buyer user with administrator privileges, can update the details of the child organization accordingly.

Managing Buyer User Details

A buyer user is a user who can purchase products from a storefront on behalf of the buyer organization to which the user belongs. Buyer users can view or modify their own user details, and view or modify the details of other buyer users who belong to the same buyer organization. Buyer users can view and modify their own user details. Additionally, buyer administrators can search for users belonging to their organization, and view and modify the details of these users.

Catalog

Sterling Web enables a user to search for a product in a category, and view its details, verify the price and availability of a product, and compare a product with other products before placing an order. This section briefly explains the catalog features that Sterling Web provides.

Browsing a Catalog

A user can browse a catalog to view the list of products under a particular category, or search a catalog to look for a particular product the user is interested in purchasing. For example, a user who is browsing a

catalog to purchase a laptop may not be interested in viewing the entire list of products in a catalog, and may want to view only the products available under the category Computers.

Sterling Web enables a user to browse a catalog from the Home page, and search for products. The product categories are displayed in the catalog navigation bar based on the entitlements that are specified at the storefront level for the user. As the user moves step-by-step through the catalog, a breadcrumb is generated at every step to enable the user to move back to any of the earlier steps.

Viewing Product Details

A user accessing the Sterling Web application can view the details of a product such as, product availability, whether the product can be picked up from a store, and so on, before adding it to their cart.

Comparing Products

A user can compare a product with other competitive products side-by-side before taking a decision about which one to purchase. A user can select any number of products and compare them based on their attributes. For example, a user who wants to purchase a computer may want to compare two or three brands of computers based on their price or features, and then place an order for the one that best meets the user's requirements.

Cart and Order Management

Sterling Web provides cart and order management functionalities that enable a user to create a cart, search for a cart or an order, add products to a cart and place an order, approve or reject an order that is on hold, make changes to an order, and so on. The mini cart functionality enables a user to get a bird's eye view of the products in a cart. A user can also create a new cart from an existing cart or a confirmed order. This section briefly explains the cart and order management feature that Sterling Web provides.

Creating a Cart

A shopping cart is the basic unit of e-commerce. Sterling Web enables a user to create a shopping cart that can be used as a starting point of placing an order. A cart is created implicitly when a guest user accesses the application. A cart is also created implicitly when a buyer user logs in to the application and there are no existing carts for that user.

Searching for a Cart

A user can search for a particular cart based on certain search criteria, and view its details. Sterling Web enables a user to search for a cart in the following ways:

- Quick Search: A user can provide the Product ID of the product in a cart, or an Order Number, Order Name, or Order Status, and search for a cart.
- Advanced Search: A user can narrow down the search results by providing more restrictive criteria and search for a cart.
- Show All: A user can use this option to view all the available carts.

Sterling Web supports searches using wild card characters. For example, if a user is looking for a cart that contains a product with XYZ123 as Product ID, the user can perform a quick search for the cart by providing XY* as a search term.

Viewing Cart Details

A user can view the details pertaining to a cart, for example, products that have been added to the cart, or availability information pertaining to the products in the cart. A user can view line-level information such as the quantity of the products in the cart, complementary products associated with the line products, UOM, availability, price adjustments, line total, and so on. A user can also view header-level information such as the total price of the order, price adjustments, if any, made to the cart, tax applied to the cart, and so on.

Activating a Cart

Sterling Web enables a buyer user to have multiple carts. However, only one of the carts can be active at a given point in time. By default, if a user has multiple carts, the most recently modified cart is set as the user's active cart, and this is the only cart the user can add products to, and place an order for. An active cart is displayed as a mini cart in the application's navigation bar. This enables a user to navigate quickly to the cart that was last modified.

For example, a user may have two carts, Cart A and Cart B. If Cart A is the user's active cart, the user may want to activate Cart B because the user wants to navigate quickly to Cart B and add products to that cart, the next time the user logs in to Sterling Web.

Viewing a Mini Cart

Sterling Web provides the mini cart functionality that enables a user to get a quick view of the contents of the user's shopping cart. For example, when a user is performing an advanced search for a product in a catalog, the user can also view the contents of the default cart, add products to the cart, or delete products from the cart. If a user has multiple carts, the user's active cart is displayed as the mini cart. Sterling Web also enables users to expand their mini cart and view line product information, such as the product IDs of the major line products in the cart, line quantity, and line total.

Deleting a Cart

After creating a cart, a user can delete the cart. For example, a user may either have a change of mind and decide against purchasing any of the products in the cart, or may have found that the products are available for a lesser price elsewhere, and may therefore want to delete the cart.

In-Store Pickup

While placing an order, a user may want to pick up the products from a store instead of having them shipped. In such a situation, Sterling Web enables the user to see if the product can be picked up from a store. The user can view the stores where the product is available, check the availability of the product at the stores, and select the store of his choice.

Checkout

Sterling Web provides the checkout functionality that enables a user to reconfirm that important information provided by the user, such as the address and payment information, is correct before the user places the order. For example, a user may want to ensure that the correct Ship-to address has been provided for the order to be shipped to the correct address.

Searching for an Order

A user can search for a particular order and view its details. Sterling Web enables a user to search for an order in the following ways:

- Quick Search: A user can provide the order number, order name, or order status, and search for an order.
- Advanced Search: A user can narrow down the search results by providing more restrictive criteria and search for an order.
- Show All: A user can use this option to view all the available orders. If any existing search settings are available, those settings will not be considered when displaying the results.

Sterling Web enables a user to search for an order using wild card characters. For example, if a user is searching for an order with 12345 as Order Number, the user can perform a quick search by providing 123* as a search term.

Viewing Order Details

Sterling Web enables a user to view the details pertaining to an order. A user can view header-level information such as the Sold To, Ship-to, and Bill To addresses, and the shipping option for the order. The user can also view line-level information such as the ID of the product, short description of the product, the order line status, alternate Ship-to address, requested quantity of the product, price adjustments, order line total, and so on. A user can also view information about coupons or promotions, if any, applied to the order, and the mode of payment for an order.

The user can thus determine the products that have already been shipped, view the tracking numbers if a commercial carrier has been used, view payment details, and so on.

Changing an Order

Sometimes a user may want to modify an existing order. Based on the permissions assigned to the user, the Sterling Web application enables the user to perform modifications such as adding a new line to an order, changing addresses, adjusting the quantity of order lines, and so on.

Approving an Order

Sometimes, an order may have to be placed on hold if the order's total amount exceeds the user's spending limit. In such a scenario, Sterling Web enables an approver to approve the order so that the order can be processed. A user can view the person who has approved an order previously, and the name of the approver who is scheduled to approve the order.

Searching for an Order Pending Approval

Sterling Web enables a user to search for an order that is on hold, pending approval, and view the details of that order. A user can search for an order that is on hold using the following options:

- Quick Search: A user can provide the order number, the name of the order owner or the order approver, and search for the order.
- Show All: A user can use this option to view all the orders that are on hold, and for which the current user is the approver or proxy approver. If any existing search settings are available, those settings will not be considered when the results are displayed.

Sterling Web enables a user to search for an order using wild card characters, including the asterisk (*). For example, if a user is looking for an order with order number 12345, the user can perform a quick search for the order by providing either 123* as a search term.

Adding a Note or Viewing a Note

Sterling Web enables a user to view the notes added to a cart or order, or add new notes describing the products that have been added to the cart or order, for future reference. A user can view the existing notes to track the changes that have occurred in a cart or an order.

For example, an approver can add notes when approving or rejecting an order. If the order is rejected, an e-mail notification is sent to the order owner indicating that it has been rejected. The e-mail contains the notes that the approver entered, indicating why the order was rejected. The user can then change the order as required, and resubmit the order for approval.

E-Mailing Cart Details and Order Details

A user can send the details pertaining to a cart or order through e-mail. A user can send the information to either a single e-mail address or multiple e-mail addresses. For example, when viewing the details of an order, a user may find that a few products have not been shipped. In such a scenario, the user can send the order details through an e-mail to verify the status of the order.

Reusing an Order

When creating a cart, a user can reuse a cart that already exists. Similarly, a user can reuse an existing order. This is especially useful, for example, when a user places an order for a particular list of products every month, with the list varying only slightly from month to month.

Canceling an Order

After placing an order, a user may want to cancel either the entire order or certain products in the order because the user discovers, for example, that these products are available at a lesser price elsewhere. Sterling Web enables a user to cancel some or all the order lines based on the user permissions and order status modification rules. The system then sends a confirmation e-mail to the corresponding user about the cancellation.

Product Configuration

Users can configure the products they are interested in buying so that they can pick and choose from a variety of options, and build the product according to their requirements. For example, a user who is interested in buying a desktop computer may want to select the appropriate RAM, hard disk, or monitor for the computer, based on specific requirements.

Index