



IBM Software Group

## WebSphere® Commerce V6.0 Feature Pack 3

### *Marketing tool*



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This presentation describes the new marketing tool in WebSphere Commerce in Feature Pack 3.

## Agenda

- Supported operations
- Marketing tool new features
- User interface introduction



This presentation first talks about all operations supported in the Feature Pack 3 marketing tool. It highlights the new features of the marketing tool which are not included in Accelerator. It then introduces marketing tool user interface, talks about how to use the tool to browse and list assets and how to create new assets.

## Operations supported in marketing tool

	Create	Change	Delete	Browse	Search	Activate or De-activate
<b>Campaign</b>	x	x	x	x	x	
<b>Web activity</b>	x	x	x	x	x	x
<b>E-mail activity</b>	x	x	x	x	x	x
<b>E-mail activity template</b>	x	x	x	x	x	
<b>e-Marketing spot</b>				x	x	
<b>Customer segment</b>				x	x	
<b>Content</b>				x	x	



This table lists all the operations supported in the marketing tool. From the table you can see that the operations supported by assets **Campaign**, **Web activity**, **E-mail activity** and **E-mail Template** are creating, changing, deleting browsing and searching. Activate and De-activate operations, which are specific operations for Web activities and e-mail activities, are also supported.

The supported operations for **e-Marketing spot**, **Customer segment** and **Content** are Browsing and Searching. For other operations such as creating, changing and deleting, you have to use the Accelerator to do them.

## Marketing tool new features

- Activity templates
  - ▶ Starting point to create Web activities
  - ▶ Contains default properties
- Activity calendar view
  - ▶ Allow business users to view activity's schedules graphically
- Activity builder
  - ▶ Create and modify Web activities
  - ▶ Create activity graphically using the activity elements
  - ▶ Activity Elements: actions, criteria
- Rich user interface experience
  - ▶ Rich text editor for e-mail templates
  - ▶ Edit in place support
  - ▶ Drag and drop support
- Campaigns, Web activities, e-Marketing spots searching



This slide lists the new features in the Feature Pack 3 marketing tool.

The **activity template** is a new object in Feature Pack 3. It allows you to create a new Web activity quickly by selecting a template. A template contains a default set of activity flow patterns. You can customize the default flow by adding other activity elements.

The **activity calendar** is a graphic view of activities. It allows you to see how activities are scheduled, such as an activity's start date and end date, and how many activities are running during a specific time period.

The **activity builder** is where you create or update your Web activity. The activity builder allows you to create Web activity graphically by using the activity elements.

The rich user interface feature allows you to use a rich text editor to create e-mail content in an e-mail template. The **edit in place** feature allows you to edit text directly in the list view without opening the property view. You can also use the drag-and-drop feature to add objects from the Utilities view.

The marketing tool provides search capabilities for campaigns, Web activities, and e-Marketing Spots.

## Enable steps required

- To use new Manage Center's Web activities
  - ▶ Enable the new marketing runtime by updating configuration file wc-server.xml
  - ▶ Update storefront JSP files according to JSP sample files



To view the new Web activities created by the new tool from the store front, you need to disable the old marketing runtime and enable the new one by editing the wc-server.xml file. You also need to update your store front JSP files.

## Marketing tool user interface introduction

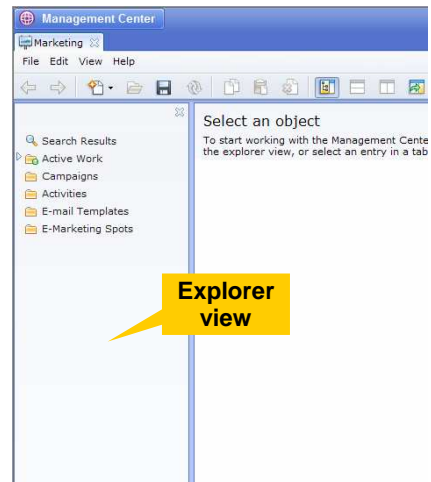
- Explorer view
- Campaign and Activity list
- Activity calendar
- E-Mail template list
- e-Marketing spot list
- Activity builder
  - ▶ Element palette
  - ▶ Flow storyboard
  - ▶ Activity templates
- E-Mail activity management form



Here are the features of the new marketing tool user interface. This presentation will go over how to use the new marketing tool to create and manage Web activities, e-mail templates, and e-Marketing spots.

## Explorer view

- All managed assets can be accessed from the Explorer view
- Campaigns and Activities folders only contain the assets created by the new tool
- Activities folder contains both Web activities and e-mail activities

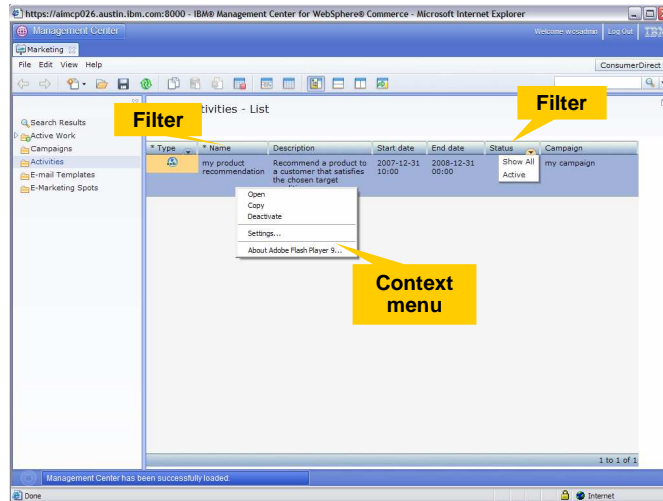


When you first open the new marketing tool you will see four folders in the navigation view. The folders, Campaigns, Activities, E-mail Templates and e-Marketing Spots contain all assets managed by the marketing tool.

Campaigns and Activities folders only contain the assets created by the new tool. You can not see campaigns and activities created by the Accelerator. Activities folder contains both Web activities and e-mail activities.

## Activity list

- Click Activities folder to list the activities
- Two filters are provided:
  - ▶ Type & Status
- Context menus are supported
  - ▶ Note: you can not delete an active activity
- The columns in the activity list table are sortable and resizable



To view activities created for the store, you need to click the Activities folders in the explorer view. Activities are displayed in a frame on the right side, which is called the work area.

**Type** and **State** filters are provided for the activity list view which allows you to list activities based on their types and states.

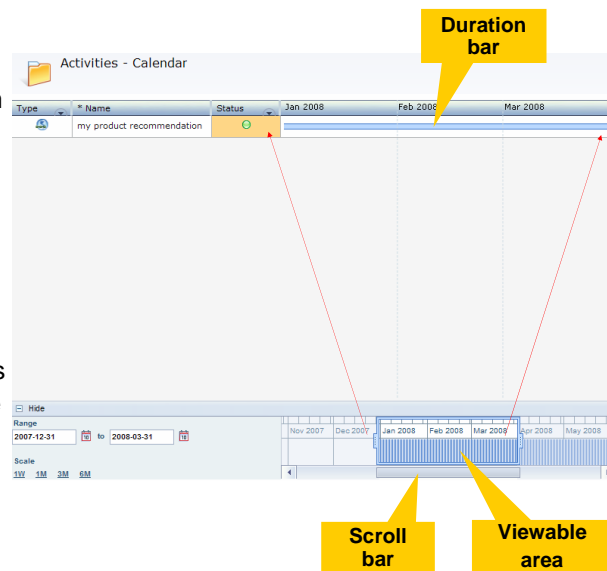
In the work area, a pop-up menu allows you to open, copy, paste, delete, activate and deactivate an activity. An active activity can not be deleted. If you want to delete an active activity, you need to deactivate it first and then do the deletion.

The items in the table are also sortable. You can sort them by clicking the column name in the table header.



## Activity calendar

- A calendar view of activities
- Launch the Activity calendar from from
  - ▶ Activities folder
  - ▶ A campaign
  - ▶ An E-marketing spot
- Activities listed are ones running within time period defined by **Viewable area**
- **Viewable area**
  - ▶ Focused time period for activities
  - ▶ Select scale or range, drag edge of scroll bar to change
- Use Calendar to view
  - ▶ Activity's start and end dates
  - ▶ Overlapping activities
  - ▶ Periods in which activity opportunities exist



**Activity calendar** is activity's calendar view. It allows you easily find out an activity's start date and end date. You can also use it to easily find out how many activities are running during a specific time period.

You can use the Activities folder pop-up menu to launch the store level Activity calendar view. To launch the activity calendar view for a campaign, first you need to click the Campaigns folder to list all campaigns, and then launch the Activity calendar view from a campaign's pop-up menu. The calendar view for an E-marketing spot is launched in the same way.

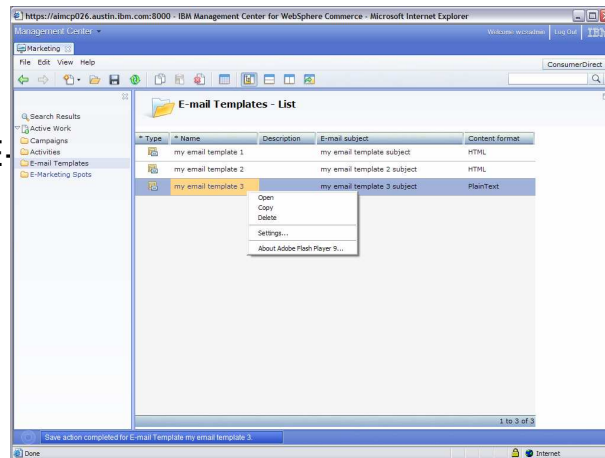
Activities listed in the Activity calendar view are the ones running within the time period defined in the Viewable area.

Each activity has a duration bar, which starts from the activity's start date and ends at the activity's end date.

**Viewable area**, shown on the bottom of the chart, is the time period that you want to focus on. You can change the Viewable area by modifying Range or Scale, by dragging the Viewable area's edges, or moving the scroll bar.

## E-mail template list

- Two types of e-mail templates are supported
  - ▶ HTML
  - ▶ Plain Text
- All the e-mail templates can be accessed from E-mail Templates folder
- pop-up menu is supported



In WebSphere Commerce, an e-mail activity template defines the structure and content of e-mail activities. It serves as an outline upon which dynamic content is applied when an e-mail is rendered by the system and it is time to deliver the e-mail activity

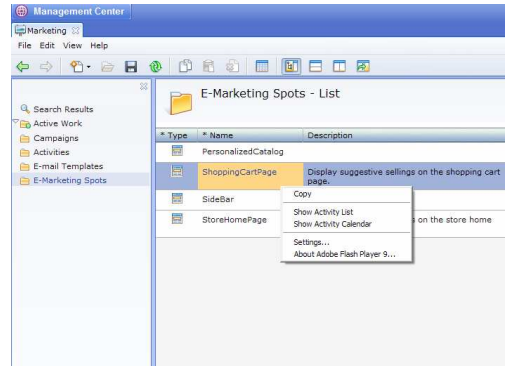
As Accelerator did in version 6, this new marketing tool supports two types of e-mail templates: HTML-based and content-based.

To show all the e-mail templates, click E-mail Templates folder in the Explorer view. Marketing tool and Accelerator manage the same set of e-mail templates.

In the e-mail templates list, you can use pop-up menu to open, copy and delete the templates.

## E-Marketing spot list

- List e-Marketing spots by selecting e-Marketing Spots folder
- No property view for e-Marketing spot. Double clicking an e-Marketing spot will show a list of activities associated with the selected spot
- Two options to view the activities for an e-Marketing spot: Activity list and Activity calendar



e-Marketing Spots are reserved spaces on your store pages in which personalized marketing content is displayed. The e-Marketing Spots are used during page creation to reserve space for the dynamic content that is shown to your customers. When a page is requested by a customer, an e-Marketing spot present on the page will communicate with the rule server to process the rule-based code associated with the spot. You can associate one e-Marketing spot with multiple Web activities. Which Web activity is displayed in the e-Marketing spot will be decided by the activity's priority.

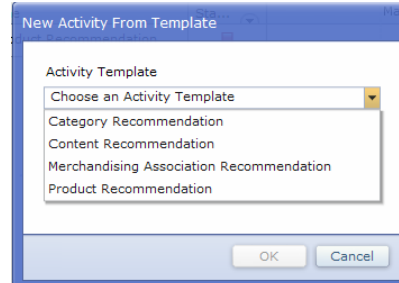
You can click on the e-Marketing Spots folder in left navigation view to show all e-Marketing spots.

Double clicking an e-Marketing spot will open the activity list view for that spot.

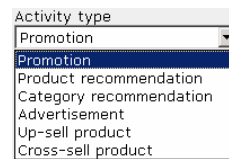
## Activity templates

- Starting points to create marketing activities
  - ▶ Similar to Accelerator's **activity type**
- Four templates included:
  - ▶ Category Recommendation
  - ▶ Content Recommendation
  - ▶ Merchandising Association Recommendation
  - ▶ Product Recommendation
- Changes from Accelerator:
  - ▶ Removed **Promotion**
  - ▶ Integrated **Up-sell product** and **Cross-sell product** into **Merchandising Association Recommendation**

### Marketing tool



### Accelerator



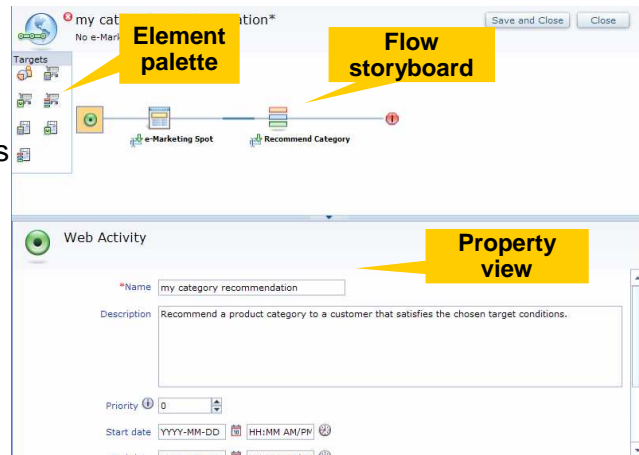
When creating a Web activity, the first thing you need to do is to select an activity template. An activity template defines the activity type you want to create. It contains some default elements you must define in order to create this type of activity.

As shown in the first screen capture, Feature Pack 3 provides four templates: Category Recommendation, Content Recommendation, Merchandising Association Recommendation and Product Recommendation.

Comparing the activity templates with activity types in Accelerator, you can see that activity templates are similar to the Accelerator's activity types. However promotions are not templates in the marketing tool. You need to use the promotion tool when creating new promotions. Activity type **Up-Sell product** and **Cross-sell product** are integrated into the **Merchandising Association Recommendation** template.

## Web activity builder

- The place to create or update Web activities
- Consists of
  - ▶ **Element palette**
    - Container of elements
  - ▶ **Flow storyboard**
    - Place to build activity flow path
    - Consists of elements and connectors
  - ▶ **Element properties view**
    - Properties of highlighted element in flow storyboard



The Web activity builder allows you to create new Web activities, or update existing ones.

The activity builder page consists of three parts: **Element palette**, **Flow storyboard**, and **Element properties view**.

The element palette contains elements, each element stands for an event, an action, or a target criteria.

The flow storyboard consists of elements and connectors. Default elements in the Flow storyboard are decided by the template you selected. A default template contains a Start element, an e-Marketing spot, a Connector and a third element. The third element is dependent on what template you selected.

The element properties view contains properties of the element that you highlighted in the Flow storyboard.

## Web activity builder

### ■ Element palette

- ▶ Container of elements
- ▶ Elements: graphical artifacts representing the shopping events, actions, and target criteria
- ▶ Dragging and dropping elements into the storyboard to modify activity flow path
- ▶ 7 elements are provided



Flow elements
Customer Segment
Shopping Cart Total
Shopping Cart Products
Shopping Cart Products from Categories
Purchase History Total
Purchase History Products
Purchase History Products from Categories

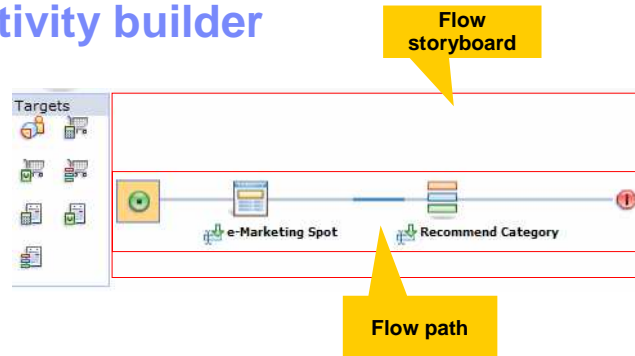


The Element palette is the place for holding all the flow elements. Flow elements are graphical artifacts representing the shopping events, actions, and target criteria.

You can drag elements from the palette and drop them into the activity flow path to add additional criteria.

In Feature Pack 3, there are seven elements provided in Element Palette. These seven element names are listed in the **Flow elements** table.

## Web activity builder



- **Flow storyboard**
  - ▶ Create and update Web activity flow
- **Flow path**
  - ▶ Graphical representation of the marketing activity
  - ▶ Consists of **start element**, **flow connectors** and **flow elements**
  - ▶ A default Flow path created based on selected template



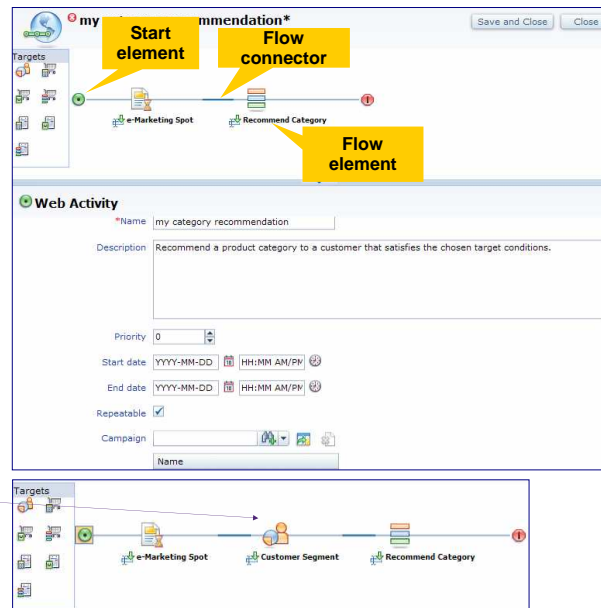
**Flow storyboard** is where you can create and modify your Web activity flow. From there you can easily see the whole picture of a Web activity's rules.

**Flow path** is composed of a **start element**, **e-Marketing spot**, **Flow connectors** and **Flow elements**.

A default flow path is created after you select an activity template. This default flow path contains three mandatory elements and a Connector. The default elements can not be removed. The first two elements are **Start element** and **e-Marketing spot** element. The third element type is decided by the Web activity template you selected.

## Web activity builder

- **Start element**
  - ▶ Entry point into the activity
  - ▶ First evaluated element by marketing runtime
  - ▶ Some common attributes defined in this element
- **Flow connector**
  - ▶ Graphical artifact used to connect flow elements
  - ▶ No equivalent runtime object
  - ▶ A place to add an element
  - ▶ Adding or removing Flow connectors is managed by tool



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**Start element** is the first element in the flow path. It is also the first element evaluated by the marketing runtime. It defines some common attributes used for all activity types.

**Flow connector** is where you can add a new Flow element. It is depicted as a short, thick line between an e-Marketing Spot element and a Recommend Category, as shown in the screen capture. It is a graphical artifact used to connect Flow elements. Flow connector does not represent any runtime object.

There is no mouse action associated with Flow connector. Connectors are added or removed automatically when you add or remove the flow elements. From the bottom screen capture, you can see that, after adding Customer Segment element into the flow path the number of Flow connectors becomes two. One is added before Customer Segment element, another one is added after Customer Segment element.



## Web activity builder

- Element
  - ▶ Graphical artifact standing for event, action, or target criteria
  - ▶ Defined by several attributes
  - ▶ Supports right click pop-up menu
  - ▶ Supports one dimension only. All elements are “**AND**” relationship
  - ▶ Allows one element to be added more than once

The screenshot displays the 'my category recommendation\*' flow path. A yellow callout box labeled 'Flow element' points to an element in the path. A right-click context menu is open over this element, showing options: 'Details', 'Remove', 'Customize', 'Settings...', and 'About Adobe Flash Player 9...'. Below the flow path, the 'Customer Segment' configuration panel is visible. It includes target condition options and a table of customer segments.

* Name	Description
Customers who are under 40 years of age	Customers who are under 40 years of age



A **flow element** is an instance of an element template in the flow path. Elements stand for the action or criteria.

Each element has several properties associated with it. To view the element properties, you can click on the element icon in the flow path, and the properties are displayed in the property view.

Flow element icons support right click pop-up menu: **Details** and **Remove**. You can only see the **Remove** menu for the elements you added in the default flow path.

Only one dimension flow paths are supported, all elements must be a straight line. Logically, elements have “**AND**” relationships, which means all conditions defined in the elements must be met before this Web activity content can be seen.

You can add the same element into the flow path more than once.

## Web activity builder

- **Element properties view**
  - ▶ Place to enter the data for element properties
- **Properties for Web activity element**
  - ▶ **Priority value**
    - Promotion tool: 0-1000, 1000 is the highest priority
    - Accelerator 1-10, 1 is the highest priority
  - ▶ **Repeatable:**
    - New property
    - Allows a shopper to view this activity content multiple times

The screenshot shows the 'my category recommendation\*' activity in the Web Activity Builder. The top part displays a flow diagram with three elements: 'e-Marketing Spot', 'Customer Segment' (with a tooltip: 'Customers in any of Customers who are under 40 years of age'), and 'Recommend Category'. Below the flow is the 'Web Activity' properties form, which includes fields for Name, Description, Priority (set to 0), Start date, End date, Repeatable (checked), and Campaign Name. A yellow callout box labeled 'Property view' points to the form.



**Element properties view** is the frame under the activity storyboard. It is a view that provides access to flow element properties. The properties in the element properties view belong to the element that you highlighted in the flow path.

**Web Activity Properties view** is the default view when you open the Web activity builder.

**Priority** in Accelerator takes a number between 1 to 10, where 1 is the highest priority. If you have more than 10 activities, then some activity priorities are the same.

Feature Pack 3 has extended the priority scope. It now can take any integer value between 0 and 1000. You can have 1000 Web activities with different priority values. Higher numbers represent higher priorities. When multiple activities are scheduled for an e-Marketing sport, the one with the highest priority is displayed first.

**Repeatable** is a new property added in Feature Pack 3. If you select this property, this activity content is displayed to shoppers multiple times. This behavior is generally desirable for Web activities.

## E-mail activity property form

- E-mail activities creation uses form-based properties screen
- The properties are same as the ones in Accelerator

The screenshot shows a web form titled "New E-mail Activity\*" with a "Save and Close" button and a "Close" button. The form contains the following fields:

- \*Name: A text input field.
- Description: A large text area.
- \*Customer Segment: A dropdown menu with a search icon and a refresh icon.
- \*E-mail Template: A dropdown menu with a search icon and a refresh icon.
- \*Reply-to e-mail address: A text input field.
- \*Send date: A date picker showing "YYYY-MM-DD".
- Campaign: A dropdown menu with a search icon and a refresh icon.

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E-mail activities are not created using the graphic interface like Web activities builder. Similar to Accelerator, managing e-mail activities is done using a form-based user interface. The properties of an e-mail activity for the new tool are the same as the ones in Accelerator.

## References

- WebSphere Commerce Enhancements for version 6  
<http://www-1.ibm.com/support/docview.wss?uid=swg24013534>
- IBM® Management Center for WebSphere Commerce  
<http://ecdid.torolab.ibm.com:8088/help/topic/com.ibm.commerce.management-center.doc/concepts/ctfcmc.htm>



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