

## Search based marketing

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## What this exercise is about

In this tutorial, you will act as a Marketing Manager to set up web and dialog activities that respond to shoppers' search terms.

First, you will use the new Customer Searches trigger to create a dialog activity that issues a promotional coupon to shoppers who search for lamps.

Next, you will create a web activity to recommend cross-sell products based on the search terms used by a shopper.

This tutorial should take approximately 30 min to complete.

## What you should be able to do

After completing this exercise, you should be able to:

- Identify the search based marketing capabilities in the Marketing tool
- Target specific search behaviors in web and dialog activities
- Recommend catalog entries based on search criteria
- Create a dialog activity using the Customer Searches trigger

## Introduction

The following naming conventions are used in the exercises:

Reference Variable	Description
<WCDE_INSTALL_DIR>	WebSphere Commerce Developer installation directory
<WC_HOST>	Hostname for WebSphere Commerce. For WebSphere Commerce Developer you can use <b>localhost</b> .

## Requirements

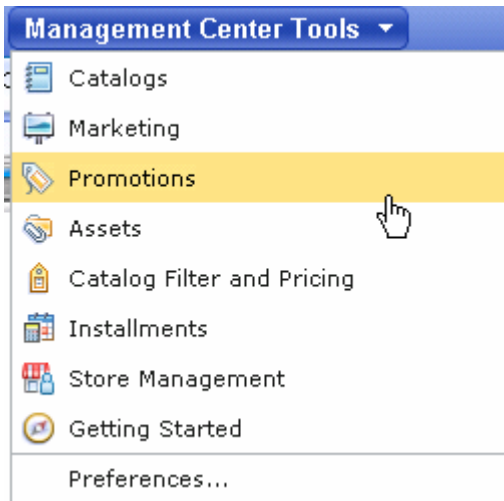
Before beginning this lab, ensure you have:

- Installed WebSphere Commerce V7 Fix Pack 2
- Installed WebSphere Commerce V7 Feature Pack 2
- Completed WebSphere Commerce search configuration

## Part 1: Create a coupon promotion

In this part of the lab, you will define a new coupon promotion that is used in a later part.

- \_\_\_ 1. Start your WebSphere Commerce application or test server.
- \_\_\_ 2. Launch Management Center using the URL **https://<WC\_HOST>:8000/lobtools**.
- \_\_\_ 3. Open the **Promotions** tool.




- \_\_\_ 4. Select the **Madisons** store.

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Note: This lab uses the store name **Madisons** to refer to the starter store where WebSphere Commerce search is configured. Your store name might differ.

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- \_\_\_ 5. Select **Promotion** from the **Create New** toolbar button  and choose **Category promotions** from the promotion type selector. Select **Percentage off the subtotal of catalog entries from a category**. Select **OK**.
- \_\_\_ 6. Complete the promotion fields as outlined below.
  - \_\_\_ a. In the **Promotion Properties** section, enter the values specified in the table below. All other fields can be left as the default values.

Field name	Value
Administrative name	20% off lamps
Redemption method	Coupon promotion
Number of days until coupon expires	90
Priority	100

- \_\_\_ b. In the **Purchase Condition and Reward** section, enter the values specified in the table below. All other fields can be left as the default values. You can specify category names by typing the name in the text box and clicking **Find and Add**.

Field name	Value
Categories	Table Lamps Desk Lamps
Minimum purchase condition	
• Quantity	1
• Percent off	20

- \_\_\_ c. Click the **Descriptions** tab. Enter the values below:

Field name	Value
Customer viewable short description	20% off lamps

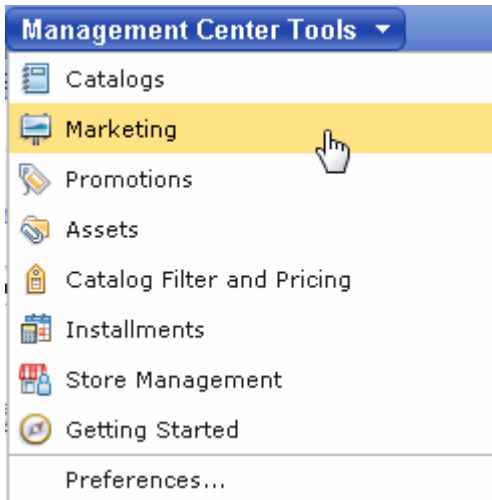
- \_\_\_ 7. Save and activate the promotion.

- \_\_\_ a. Select **Save and Close**.
- \_\_\_ b. Select the **Promotions** folder in the Explorer View.
- \_\_\_ c. Find the 20% off lamps promotion you just created, right click and choose **Activate**.

## Part 2: Create a new dialog activity

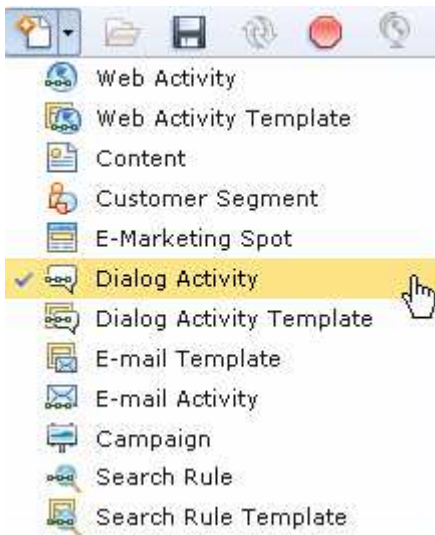
In this part of the lab, you will create a dialog activity using the new Customer Searches trigger.

- \_\_\_ 1. Open the **Marketing** tool.



- \_\_\_ 2. Select the **Madisons** store

- \_\_\_ 3. Select **Dialog Activity** from the **Create New** toolbar button and choose the **Blank Dialog Activity** template.



- \_\_\_ 4. On the Dialog Activity General Properties tab, name your activity **Search coupon**. Click the **Repeatable** check box to allow the activity to run more than once per shopper.

- \_\_\_ 5. Add a **Customer Searches** trigger  into the empty activity.

- \_\_\_ 6. Click the **Customer Searches** trigger to display its property panel. Enter the property values shown in the table. When you are finished the property pane should look like the screen capture below. By checking the **Use synonyms** check box, this activity will be triggered by the specified search keyword or any synonyms defined for the search keyword.

Field	Value
Keyword matching rule	Search keyword starts with one of the following values
Search keywords	lamp
Use synonyms	Checked
Times	1
Time frame	At any time

Customer Searches

\*Keyword matching rule Search keyword starts with one o ...

\*Search keywords


- \* Keyword
- lamp

1 of 1 selected

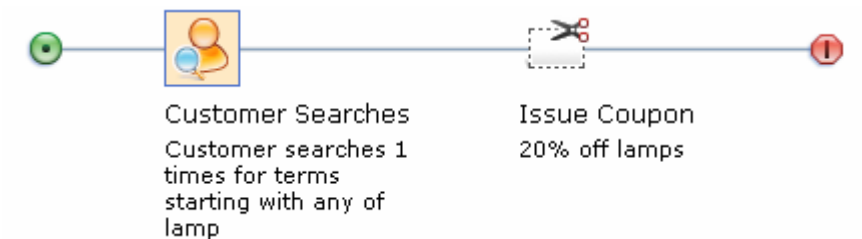
Use synonyms

\*Times 1

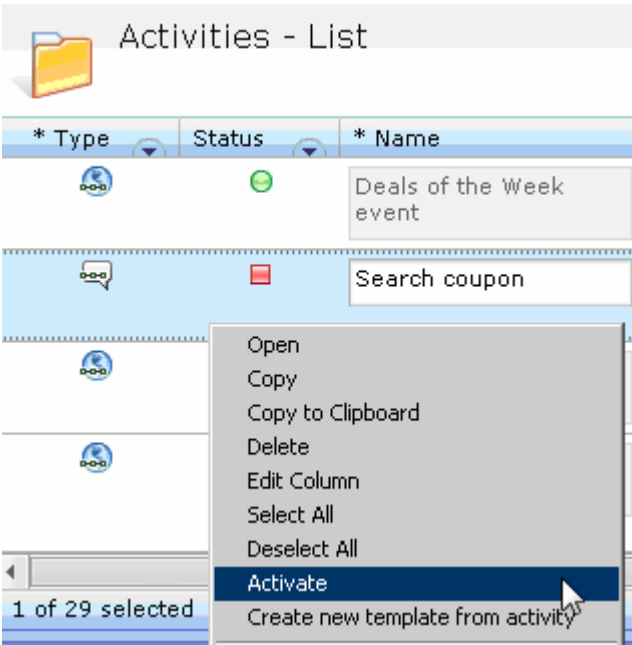
Time frame At any time

- \_\_\_ 7. Add the **Issue Coupon**  action to the dialog activity following the **Customer Searches** trigger.
- \_\_\_ 8. Click the **Issue Coupon** action to display its property panel.
- \_\_\_ 9. Type **20% off lamps** into the text box and click **Find and Add**.

10. The completed dialog activity should look like this. Click **Save and Close** to save the dialog activity.



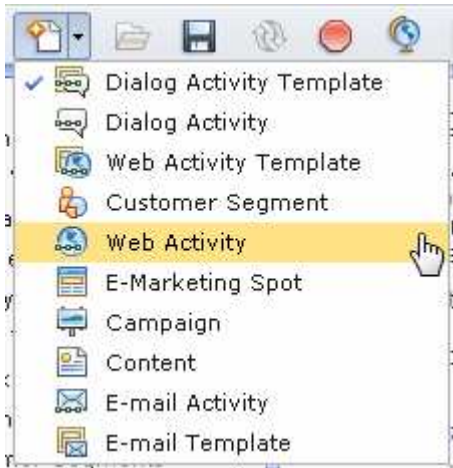
11. Open the Activities list and activate your new activity.



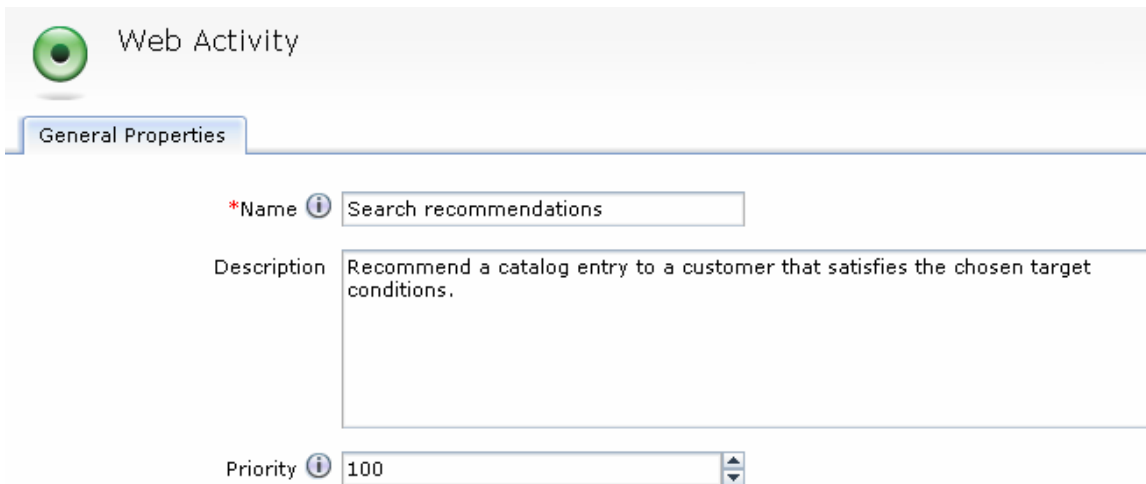
## Part 3: Create a new web activity

In this part of the lab, you will create a web activity that will provide a cross-sell recommendation for outdoor chairs when a customer searches for outdoor tables.

1. Select **Web Activity** from the **Create New** toolbar button and choose the **Catalog Entry Recommendation** template.



2. On the Web Activity General Properties tab, name your activity **Search recommendations** and set the priority to **100**.




Web Activity

General Properties

\*Name ⓘ Search recommendations

Description  
Recommend a catalog entry to a customer that satisfies the chosen target conditions.

Priority ⓘ 100

3. Click the **E-Marketing Spot** element in the activity builder.
4. In the E-Marketing Spot properties panel enter the name **RightSidebarFeaturedProducts** and click **Find and Add**.
5. Add a **Current Page** target  into the activity after the E-Marketing Spot.



- \_\_\_ 6. Click the **Current Page** target to display its property panel. Enter the property values shown in the table. When you are finished the property pane should look like the screen capture below. By checking the **Use synonyms** check box, this target will evaluate to true for the specified search keyword or any synonyms defined for the search keyword.

Field	Value
Customer behavior	Customer is viewing search results
Target customers	Who are searching for any of the following keywords
Keyword matching rule	Search keyword is exactly one of the following values
Search keywords	table
Use synonyms	Checked

Current Page

\*Customer behavior Customer is viewing search results ▼

Target customers  Who are searching for any of the following keywords  
 Who are not searching for any of the following keywords

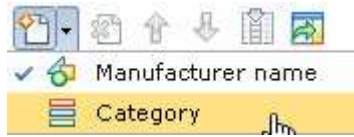
\*Keyword matching rule Search keyword is exactly one of ... ▼

\*Search keywords   
 \* Keyword  
 table  
 0 of 1 selected

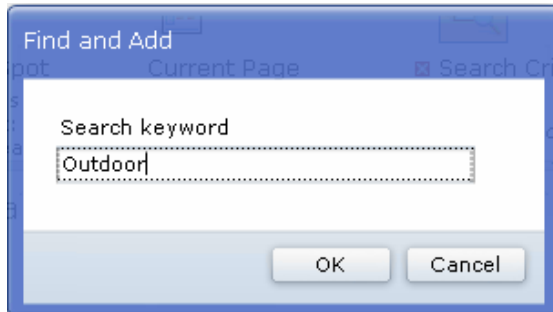
Use synonyms

- \_\_\_ 7. Add a **Search Criteria and Result** target into the activity after the **Current Page** target.
- \_\_\_ 8. Set the target to match customers who search the outdoor furniture category.
- \_\_\_ a. Click the **Search Criteria and Result** target to display its property panel.
- \_\_\_ b. In the **Target customers** field, select the radio button for **Who used the following search criteria**.

\_\_ c. In the Search criteria field, click the new criteria button and select Category




\_\_ d. Enter **Outdoor** in the Find and Add popup and click **OK**.

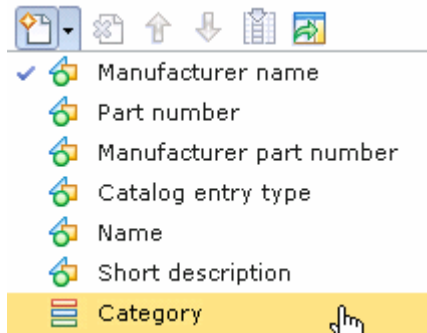


\_\_\_ 9. Click the **Recommend Catalog Entry** action in the activity builder to display its property panel.

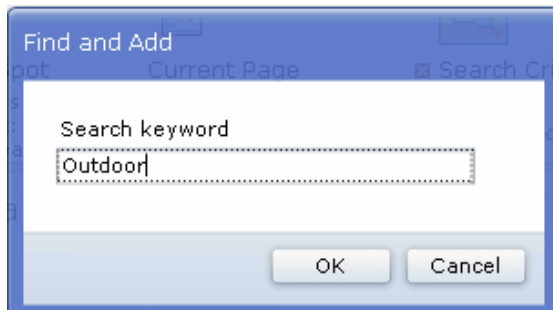
\_\_ a. In the **Recommendation method** field, select the radio button for **Use search to recommend catalog entries found using a specified keyword**.

\_\_ b. In the **Keyword** field, enter the word **chair**.


\_\_ c. Click the  button to add a new **search filter** for category



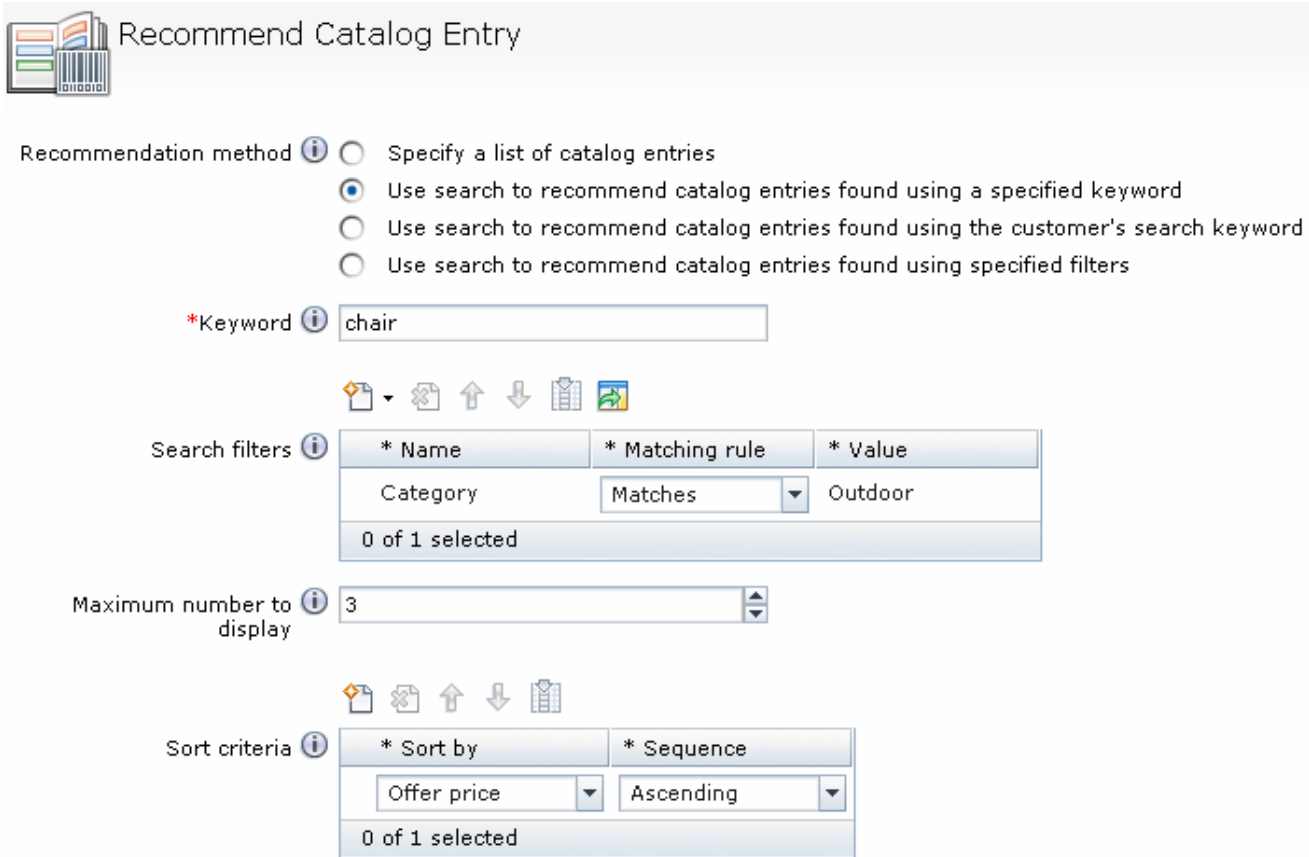
\_\_ d. Enter **Outdoor** in the Find and Add popup and click **OK**.





\_\_\_ e. Set the **Maximum number to display** field to **3**.


\_\_\_ f. Click the  button to add a new **sort criteria**.

\_\_\_ g. Set the **Sort By** column to **Offer price** and the **Sequence** column to **Ascending**. When you are finished the property pane should look like the screen capture below.




Recommendation method   Specify a list of catalog entries  
 Use search to recommend catalog entries found using a specified keyword  
 Use search to recommend catalog entries found using the customer's search keyword  
 Use search to recommend catalog entries found using specified filters


\*Keyword 

Search filters 

* Name	* Matching rule	* Value
Category	Matches	Outdoor

0 of 1 selected

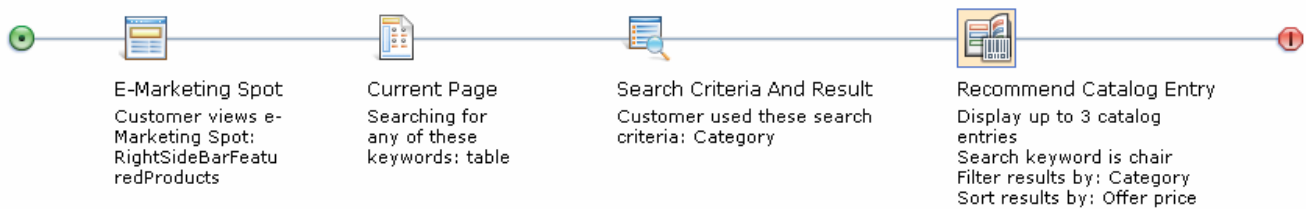
Maximum number to display 

Sort criteria 

* Sort by	* Sequence
Offer price	Ascending

0 of 1 selected

\_\_\_ 10. The completed web activity should look like this. Click **Save and Close** to save the web activity.



\_\_\_ 11. Open the Activities list and activate your new activity as you did in Part 1.

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## Part 4: Configure the server to track online behavior

In this section, you will configure WebSphere Commerce to track online behavior of shoppers. This step is necessary for the **Customer Searches** trigger to work. **If you have previously completed these steps you can move on to Part 5.**

- \_\_\_ 1. In the WebSphere Commerce Information Center, navigate to the page **Migrating > Taking your first steps after WebSphere Commerce migration > Migrating marketing > Migrating marketing from WebSphere Commerce Accelerator to Management Center Version 7 > Enabling Management Center marketing features.**

Direct link: <http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com.ibm.commerce.management-center.doc/tasks/tsbenable.htm>

- \_\_\_ 2. Complete the steps described in the Information Center to enable:

- \_\_\_ a. Persistent sessions and personalization ID (Step 3).
- \_\_\_ b. Sensor Event Listener (Step 4a - c).

- \_\_\_ 3. **Restart** your WebSphere Commerce application or test server

## Part 5: Test your marketing activities

In this section, you will test your new dialog activity and web activity in the Madisons store.

- \_\_\_ 1. Launch the Madisons store. You can find tips for launching the store in Appendix A.
- \_\_\_ 2. Log in as an existing shopper or register a new shopper.
- \_\_\_ 3. Test your dialog activity.
  - \_\_\_ a. Search for the term **lamp**.
  - \_\_\_ b. Click the **My Account** link at the top of the page and then select **My Coupons** from the left navigation bar



- \_\_\_ c. The 20% off lamps coupon should be displayed. This coupon was issued by the dialog activity when the shopper searched for the term **lamp**. If you have any synonyms defined for the term **lamp**, searching on those terms should also issue a coupon.

My Coupons		
COUPON	EXPIRATION DATE	
20% off lamps	Mar 3, 2011	<a href="#">Remove</a>

\_\_\_ 4. Test your web activity

- \_\_\_ a. Click the **Advanced Search** link at the top of the page.
- \_\_\_ b. Search for the term **table** in the category **Furniture: Outdoor**.

Advanced search  
Seperate each search term with a space

Search for:

Exclude:

Located in:

Brands:




Price range: from  to

Search in:

Number of results per page

- \_\_\_ c. The recommendations e-Marketing Spot in the right sidebar should display cross-sell recommendations for chairs in the outdoor furniture category.

Recommendations  
You may also like:

	Guest Chairs <del>\$99.00</del> \$69.99 <a href="#">Add to Cart</a>
	Rattan Chair <del>\$75.00</del> \$69.99 <a href="#">Add to Cart</a>
	Bar Chair <del>\$420.00</del> \$114.99 <a href="#">Add to Cart</a>

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## Part 6: What you did in this exercise

In this tutorial you learned how to use the new precision marketing capabilities to perform search based marketing.

You should now understand how to complete the following tasks:

- Identify the search based marketing capabilities in the Marketing tool
- Target specific search behaviors in a web and dialog activities
- Recommend catalog entries based on search criteria
- Create a dialog activity using the Customer Searches trigger

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## Appendix A: Launching the Madisons store

This section outlines four different options for launching the Madisons store.

1. In the WebSphere Commerce Developer environment, you can use the **Useful URLs** section of the hints and tips page located at **<WCDE>\hintsandtips.html**.

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Note: The link on this page launches the store called 'Madisons'. If you published your store under a different name, you need to update the store name in the link before it will work. You can do this by opening the hints and tips file in a text editor and updating the store name.

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2. Enter the store URL directly into a browser and bookmark it for later use. The store URL is `http://<WC_HOST>/webapp/wcs/stores/servlet/Madisons/index.jsp`
3. Launch the store from the Management Center Store Management Tool. Steps for using the Store Management Tool can be found in the Information Center at **Operating > IBM Management Center for WebSphere Commerce > Store Management tool > Working with stores > Selecting and viewing stores**.  
Direct link: <http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com.ibm.commerce.management-center.doc/tasks/tstpreviewstorechanges.htm>
4. Launch the store using the Management Center store preview. Steps for using store preview can be found in the Information Center at **Operating > IBM Management Center for WebSphere Commerce > Using the Management Center > Previewing a store**.  
Direct link: [http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com.ibm.commerce.management-center.doc/tasks/tpvpreview\\_store.htm](http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com.ibm.commerce.management-center.doc/tasks/tpvpreview_store.htm)