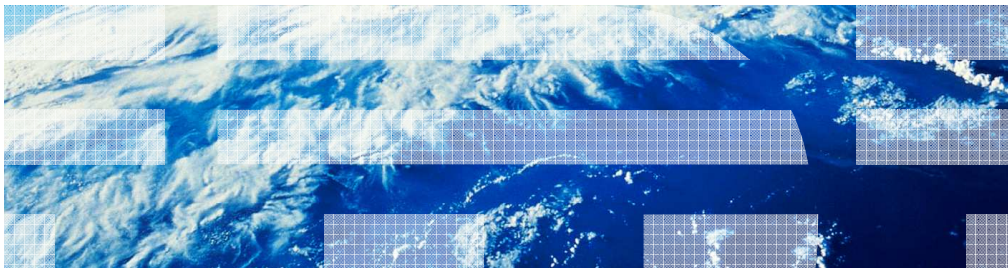


## WebSphere Commerce V7 feature pack 2

### Coremetrics Intelligent Offer integration



This presentation provides an overview of the integration of Coremetrics Intelligent Offer with WebSphere Commerce V7.0 Feature Pack 2. You should have a general knowledge of the features in WebSphere Commerce V7.0, Coremetrics and Intelligent Offer feature before viewing this presentation.

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## Agenda

- Overview of Coremetrics
- Goals of solution
- Dynamic recommendation
- Flat file recommendation
- Configuration and setup
- Other considerations

This presentation starts with a brief overview of Coremetrics, then lists the goals of the solution. Next, it outlines the required steps to configure WebSphere Commerce to make use of the Intelligent Offer recommendations. The presentation then explains in more detail how dynamic and flat file recommendations can be used in WebSphere Commerce.

## Background

- Coremetrics
  - Leader in marketing optimization
  - Analytics platform designed to anticipate needs of every customer
- Coremetrics Intelligent Offer
  - Generates personalized product recommendations for each visitor
  - Can be accessed through Dynamic Recommendations
  - Also through flat files to easily integrate with off-line channels

This slide provides some background information on Coremetrics and the Intelligent Offer (IO) feature. The scope of this solution focuses on the integration of Coremetrics Intelligent Offer in WebSphere Commerce, so it assumes you are already familiar with Coremetrics and IO. Coremetrics is known as a leader in marketing optimization. It specializes in real-time personalized recommendations, email targeting across leading ad networks and search engine bid management. It is an analytics platform designed to anticipate the needs of customers by automating marketing decisions in real time, and syndicating information across all customer channels.

The Intelligent Offer piece of Coremetrics generates personalized product recommendations for each visitor based on current session, historical browsing, shopping and purchasing data collected by Coremetrics Analytics. It can be accessed through dynamic recommendations for integration directly with a website's presentation layer. Also through flat files where recommendation data can be easily integrated with off-line channels or custom applications such as call center, paper catalogs and in-store kiosks.

## Goals

- Provide integration between WebSphere Commerce and Coremetrics Intelligent Offer
- Intelligent Offer (IO) provides two methods of returning recommendations:
  - Dynamic Recommendations – real time call to Coremetrics to provide personalized recommendations
  - Flat File Recommendations – import fixed list of recommendations from Coremetrics to deliver static recommendations

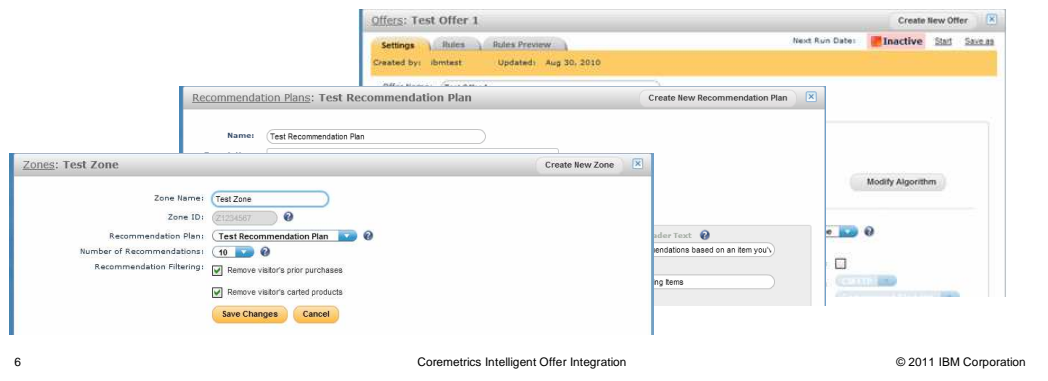
The goal in WebSphere Commerce V7 feature pack 2 is to provide a closer integration between WebSphere Commerce and the Coremetrics Intelligent Offer (IO). Intelligent Offer provides two methods of returning recommendations and there are ways to make use of each of these recommendations in your WebSphere Commerce store. Dynamic recommendations are accessed through a real time call from the storefront to Coremetrics to provide personalized product recommendations. Flat file recommendations are a fixed list of product recommendations that can be imported to WebSphere Commerce as merchandising associations and used to deliver static product recommendations.

## ***Dynamic recommendations***

Next, the presentation will take you through dynamic recommendations in more detail.

## Dynamic recommendations

- Create in Coremetrics Intelligent Offer tools
  - Offer
  - Recommendation Plan – targeting rules, fallback rules
  - Zone – area on web page to display recommendations
- Coremetrics creates a set of recommendations
- Recommendations are put on the Content Delivery Network (CDN)
- Modify store pages to call Coremetrics to return recommendations



To use dynamic recommendations in WebSphere Commerce, you need to first create an offer, recommendation plan and a zone in the Coremetrics Intelligent Offer tools. The recommendation plan specifies which products you want to offer, and the zones will specify where to display the dynamic recommendations. Coremetrics will then create a set of recommendations based on the data and send it to the content delivery network. You can then modify the WebSphere Commerce store JSP pages to call Coremetrics to return the recommendations.

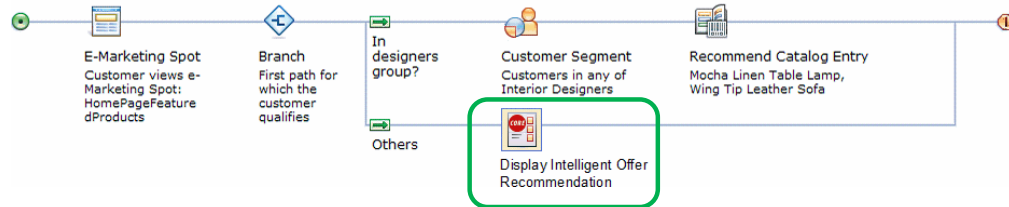
## Dynamic recommendations – typical scenarios

- Typical Scenarios include recommendation on
  - home page based on site top sellers
  - category page based on current category best sellers
  - product page based on current product
  - product page based on current product with fallback to display current category best sellers
  - shopping cart page based on most recently viewed product
  - search page based on current search

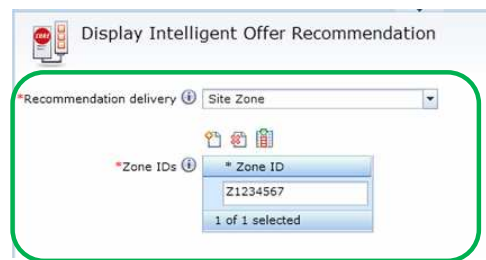
This slide shows some typical scenarios where you can include the dynamic recommendations on your storefront.

## Dynamic recommendations – e-marketing spot integration

- Sample web activity



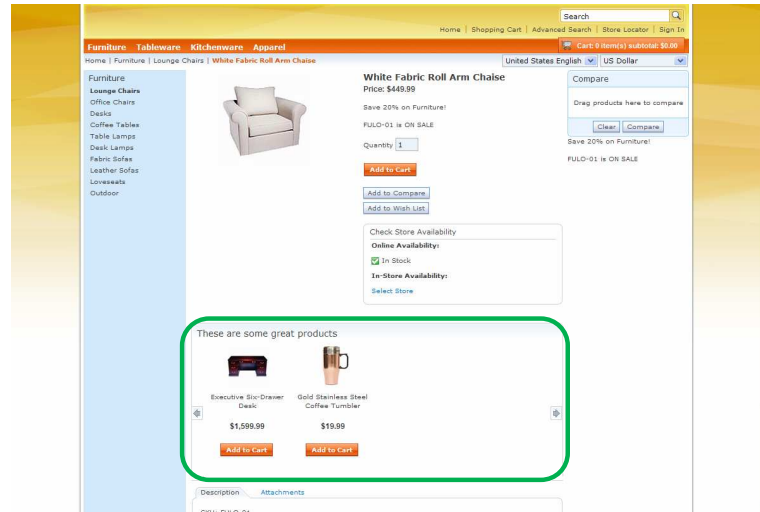
- New action: Display Intelligent Offer Recommendation action



There is a new action in the Management Center Marketing tool to allow you to specify when and where to display the IO recommendation. You can also choose whether the recommendation delivery is flat file or dynamic recommendation. For dynamic recommendations, enter one or more zone IDs defined in the Intelligent Offer software. If you specify multiple zone IDs, then the e-Marketing Spot displays a separate section for the recommendations for each zone. However, Coremetrics ensures that the same catalog entry is not recommended in more than one zone on the page.



## Dynamic recommendation - storefront



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Coremetrics Intelligent Offer Integration

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Here is the resulting e-Marketing Spot on the storefront. The title of the recommendation area is the Zone Header Text from the Recommendation Plan. Ensure your store developer has configured the e-Marketing Spot to match the corresponding zone function.

If the zone displays recommendations for a specific catalog entry, the e-Marketing Spot must be passed the part number ID of the current catalog entry. If the zone has a fallback in the recommendation plan to display category top sellers, the e-Marketing Spot must be passed the parent category ID of the catalog entry. If the zone displays recommendations for the most recently viewed product, the product display page must contain a Coremetrics tag to identify viewed products. If the zone displays recommendations for the most recently purchased product, the order summary page must contain a Coremetrics tag to identify purchased products.

If the zone displays recommendations for category top sellers, the e-Marketing Spot must be passed the current category ID.

If the zone displays recommendations for site top sellers, the e-Marketing Spot must be passed `_TS_` as the category ID.

## ***Flat file recommendations***

The next slides will describe the flat file recommendations in more detail.

## Flat file recommendations – setup

- Create the Offer in Coremetrics Intelligent Offer tools
- Coremetrics analyzes the site data, and creates a set of recommendations
- These recommendations are sent through ftp on a scheduled basis

The screenshot shows the 'Offers: Test Offer 2' configuration page. The interface includes a header with 'Settings', 'Rules', and 'Rules Preview' tabs, and a status bar indicating the offer is 'Inactive'. The main configuration area is divided into several sections:

- Offer Information:** Offer Name: Test Offer 2; Offer Type: Product Cross Sell.
- Identify Targets:** Radio buttons for 'All Active Products' (selected), 'Top (1000) Product Sold', 'Categories of Products', and 'List of Products'.
- Identify Target Exclusions:** Input List.
- Update Frequency:** Radio buttons for 'Daily', 'Weekly' (selected), and 'Monthly'.
- Data Analysis Time Period:** Session Based: 120 days; Registration Based: 90 days.
- Algorithm:** View to View: 70; View to Buy: 30; Buy to Buy: 5; Abandon to Buy: 5. Includes a 'Modify Algorithm' button.
- Delivery Options:** Flat File. Includes settings for Number of Recommendations (6), Enable Recommendation Fallback (checked), Export Destination (CM FTP), Field Delimiter, and File Format (Text File (.txt)).
- Preview Target List:** Radio buttons for 'Use the top 25 Target IDs as Preview Targets' (selected) and 'Use the Target IDs below as Preview Targets'. A list of target IDs is visible: PROP-01, PZTA-02, R2FA-01, TATA-01, TAWI-01.

Similar to dynamic recommendations, you need to create an offer in Coremetrics. You do not need a recommendation plan or zones for flat file recommendations. Coremetrics will then analyze the data and create a set of recommendations and these are then sent through FTP on a scheduled basis.

## Flat file recommendations – merchandising association integration

- Display Intelligent Offer Recommendation action (Flat File)

\*Intelligent Offer Recommendation

Save and Close Close

Targets

E-Marketing Spot  
Customer views e-Marketing Spot:  
RightSideBarFeatu  
redProducts

Display Intelligent Offer Recommendation  
Display a recommendation based on the  
catalog entries on the current page.  
Offer name: Test Offer 2

Display Intelligent Offer Recommendation

\*Recommendation delivery Flat File

\*Offer name Test Offer 2

Action

- Display a recommendation based on the catalog entries of the current page
- Display a recommendation based on the catalog entries in the customer's shopping cart
- Display a recommendation based on the catalog entries in the customer's purchase history
- Display a recommendation based on specific catalog entries

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Coremetrics Intelligent Offer Integration

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WebSphere Commerce provides a mapping that takes the flat file and uses the Catalog Data Load utility to import the recommendations as Merchandising Associations. Then these merchandising associations can be returned to the storefront through the Display Intelligent Offer Recommendation action. You need to make sure to enter the Offer name as it written in the text file. The maximum length of the offer name is 32 characters. For every offer you create in Coremetrics, it will generate a new flat file. You also need to specify what catalog entries you want to base the display of Intelligent Offer product recommendations on. The available options are shown in the screen capture on the slide.

## Flat file recommendation – scheduled job

- Scheduled job required for IO recommendation flat file
- The job will perform these actions
  - Create a new entry in the MASSOCTYPE database table
  - Delete existing merchandising associations in the store for specified offer
  - Call the catalog data load to import the merchandising associations
- Assumptions:
  - IO files are available in a directory on the WebSphere Commerce Server
  - No pulling of files from the IO ftp site

A scheduled job is required to process the IO recommendation flat file. The command should be set up to run in the store where the associations are imported. If necessary, the command will create a new entry in the merchandising association type database table, or delete the existing merchandising associations in the store for the specified offer. Then it will call the catalog data load to import the merchandising associations.

## ***Configuration and customization***

The next slides will describe the flat file recommendations in more detail.

## Configuration and setup

- Dynamic Recommendation storefront sample support
  - Requires publishing the feature pack 2 Store Enhancements SAR
- Dynamic Recommendation storefront JavaServerPages and JavaScript samples provided
  - Customers required to copy and modify the samples
- Flat File Recommendation data load configuration is included with WebSphere Commerce

You are required to install fix pack 2 and feature pack 2, publish stores and corresponding store enhancement SAR files before proceeding. All configuration files are provided by default with the product, but will require copying and modifications.

## Configuration and setup – dynamic recommendations

- Move CIO JavaScript files
  - IntelligentOffer.js to <WC\_eardir>\Stores.war\Madisons\javascript
  - IntelligentOfferESpot.jsp, IntelligentOfferDisplayPartnumbers.jsp and IntelligentOfferDisplayPartnumber.jsp to <WC\_eardir>\Stores.war\Madisons\Snippets\Marketing\Espot
- Edit <WC\_eardir>\xml\config\bi\biConfig.xml
  - Set storeid, enabled="true" and clientid for the store
- Edit <WC\_eardir>\Stores.war\Madisons\Snippets\Marketing\Espot\IntelligentOfferESpot.jsp
  - Set value to get recommendations from the test or production system

Detailed instructions are provided in the WebSphere Commerce Information Center on how to configure and setup dynamic recommendations. The steps on this slide provide a high-level overview of the steps required. You need to setup store JSP pages with Intelligent Offer e-Marketing Spot snippets in order to enable dynamic recommendations to be displayed on the storefront. In the biConfig.xml file, you will set the store ID, enable the new marketing action and set the Coremetrics client ID for the store.



## Configuration and setup – dynamic recommendation

- Update applicable store pages to include an e-Marketing Spot
  - Include a CIO e-Marketing Spot on the Product Display page to display recommendations for the current product
    - Edit
 

```
<WC_eardir>\Stores.war\Madisons\Snippets\Catalog\CatalogEntryDisplay\CachedProductOnlyDisplay.jsp
```
    - Create the corresponding IntelligentOfferRecommendations e-Marketing Spot
- Include an Intelligent Offer e-Marketing Spot on the Home page that will display top seller recommendations
  - Edit
 

```
<WC_eardir>\Stores.war\Madisons\Snippets\Catalog\CategoryDisplay\CachedTopCategoriesContentExt.jspf
```
  - Create the corresponding HomePageIntelligentOffer e-Marketing Spot
- Define e-Marketing Spots on category display pages for top seller category based recommendations
  - Edit
 

```
<WC_eardir>\Stores.war\Madisons\Snippets\Catalog\CategoryDisplay\CategoryOnlyDisplay.jsp
```
  - Create the corresponding IntelligentOfferCategoryPage e-Marketing Spot

These steps are optional depending where you want to display the recommendations on your storefront JSP pages. For example, if you want to display dynamic recommendations for a current product, then you need to modify the `CachedProductOnlyDisplay.jsp` file to create the corresponding e-Marketing Spot. You then need to define an e-Marketing spot and web activity In Management Center using the new action to display the recommendations.

## Configuration and setup – flat file recommendations

- Create a directory to store flat file from Coremetrics (ex: C:\IntelligentOffer)
  - Copy CIO flat files to directory
  - File name must have format IO\_<client ID>\_<offer name>\_<YYYYMMDD>\_I.txt
- Configure command (ImportIntelligentOfferAssociationsCmd) to import merchandising associations provided in flat file
  - Configure scheduler to run command in Administration Console
    - Choose store to import associations
    - Create new scheduled job
  - Methods to run command
    - Import all files in a directory that have proper format
      - Specify directory parameter
      - Import individual flat file
      - Specify directory and file parameters
- Create web activity and specify offer name in Display Intelligent Offer Recommendation action

To use the flat file generated from Coremetrics, you need to first create a local directory to store the list of merchandising associations. All error logs are created and stored in that directory as well. Then you need to configure the scheduler, from the Administration console, to run the command to import merchandising associations provided in the flat file.

This command can be used in two ways. The first is to import all files in a directory that have the format specified on the slide. In this case, you only need to specify the directory name. The second way is to import an individual flat file, so then you need to specify both directory and file name. Similar to dynamic recommendations, you need to create a web activity to display the associations.

## Customization

- Flat File
  - Customize runtime command `ImportIntelligentOfferAssociationsCmd` to configure data load
    - Add parameters by overriding `getDataLoadParameters()`
  - Extend catalog data load files
    - `<wc-ear>/xml/config/com.ibm.commerce.marketing/dataload/wc-dataload-env`
    - `<wc-ear>/xml/config/com.ibm.commerce.marketing/dataload/wc-dataload.xml`
    - `<wc-ear>/xml/config/com.ibm.commerce.marketing/dataload/wc-loader-merchandising-association.xml`
- Dynamic Recommendations
  - Integrate IO recommendations in store based on sample `JavaServerPages` and `JavaScript`

For flat files, the runtime command `ImportIntelligentOfferAssociationsCmd` can be customized to configure data load. You can add additional parameters by overriding the `getDataLoadParameters()` method. Catalog data load files can be modified as necessary following the standard method for extensions of component configuration.

For dynamic recommendations, you have many options on how you want to integrate IO recommendations in your store.

## Other considerations

- Security
  - A new runtime command ImportIntelligentOfferAssociationsCmd
  - A new storefront view AjaxIntelligentOfferDisplayView
- Migration and Compatibility
  - New e-Marketing Spot compatible with existing store pages and existing display types
- Serviceability
  - Storefront and Management Center uses standard tracing
  - Flat file import use marketing and catalog tracing
  - Log file created in specified directory when an error occurs

There is a new runtime command ImportIntelligentOfferAssociationsCmd added that is only available to Site Administrators. A new storefront view AjaxIntelligentOfferDisplayView is added that is available to all customers of the store. The new e-Marketing Spot must be compatible with existing store pages – including pages that have Coremetrics tagging set up. The storefront and Management Center will use standard tracing such as the foundation and marketing trace components and the flat file import will use the marketing and catalog trace components. Data load creates a log file in the specified directory when an error occurs.

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## Summary

- Overview of Coremetrics
- Goals of solution
- Dynamic Recommendation
- Flat File Recommendation
- Configuration and setup
- Other considerations

This presentation started with a brief overview of Coremetrics, then listed the goals of the solution. It then outlined the required steps to configure WebSphere Commerce to make use of the Intelligent Offer recommendations. The presentation then explained how dynamic and flat file recommendations can be used in WebSphere Commerce.

## References

- Installing and implementing Coremetrics Intelligent Offer features for Management Center
  - [http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/index.jsp?topic=/com.ibm.commerce.management-center.doc/tasks/tsb\\_IntelligentOffer\\_roadmap.htm](http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/index.jsp?topic=/com.ibm.commerce.management-center.doc/tasks/tsb_IntelligentOffer_roadmap.htm)
- Display Intelligent Offer Recommendation
  - <http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/index.jsp?topic=/com.ibm.commerce.management-center.doc/concepts/csbackdispintellofferrec.htm>
- Add e-Marketing Sports to support Coremetrics Intelligent Offer
  - <http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/index.jsp?topic=/com.ibm.commerce.management-center.doc/concepts/csbackdispintellofferrec.htm>

These are additional references for the Coremetrics Intelligent Offer feature in the WebSphere Commerce Information Center.



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