IBM® WebSphere® Commerce V7 Feature Pack 3 – Lab exercise

Promotion trigger lab

Promotion trigger

What this exercise is about

In this tutorial, you will act as a Marketing Manager to set up dialog activities that respond to customers' promotion usage in the store. You will create two separate activities.

The first activity targets shoppers who make a purchase using the HAVEN10 promotion code. Each shopper who uses the promotion code receives a one-time use coupon for 10% off silverware.

The second activity builds a customer segment of shoppers who make one purchase that qualifies for the free gift on orders over $100 promotion. Once the segment is populated, you can use it for a variety of marketing initiatives. For the purpose of this tutorial, you will create a new promotion that is only available to members of the group.

This tutorial should be completed using the Madisons store. It should take approximately 30 minutes to complete.

What you should be able to do

After completing this exercise, you should be able to:

- Target specific promotion usage using a dialog activity

Requirements

Before beginning this lab, ensure you have:

- Installed WebSphere Commerce V7 Fix Pack 3

- Installed WebSphere Commerce V7 Feature Pack 3

- Enabled the management-center feature

- Enabled Management Center marketing features - http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/index.jsp?topic=/com.ibm.commerce.management-center.doc/tasks/tsbenable.htm

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. If you are using the WebSphere Commerce Server environment, you must also start the Solr server.

____ 2.   Launch Management Center.

____ 3.   Open the **Promotions** tool.
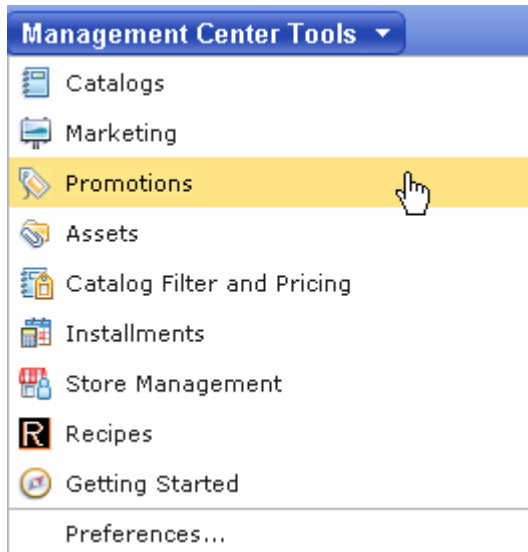
____ 4.   Select the **Madisons** store.

____ 5.   Use the Create New toolbar button ⬧ to create a new promotion. Select **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	10% off silverware
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	Silverware
Minimum purchase condition • Quantity • Percent off	 1 10

__ c. Click the **Descriptions** tab. Enter the values below:

Field name	Value
Customer viewable short description	10% off silverware

____ 7. Save and activate the promotion.

__ a. Select **Save and Close**.

__ b. Select the **Promotions** folder in the Explorer View.

__ c. Find the **10% off silverware** promotion you just created. Right click and choose **Activate**.

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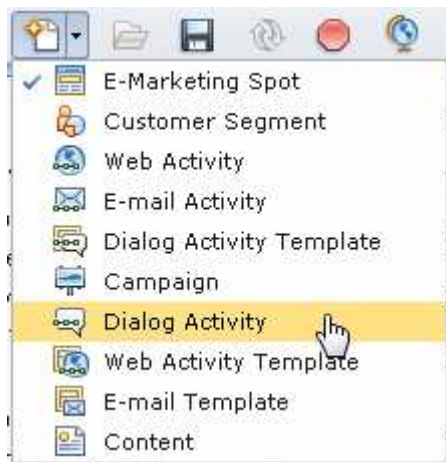
Part 2: Create a dialog activity to issue a coupon

In this part of the lab, you will create a dialog activity using the new **Customer Checks Out With Promotion** trigger.

____ 1.   Open the **Marketing** tool.
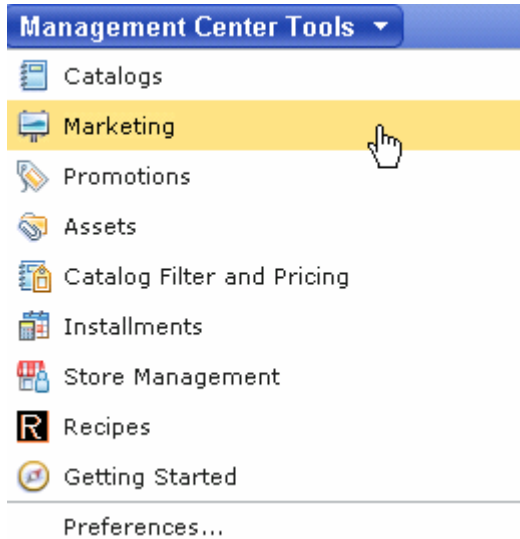
____ 2.   Select the **Madisons** store

____ 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 **Promotion code check.**

____ 5.   Add a **Customer Checks Out With Promotion** trigger into the empty activity.

_____ 6.   Click the **Customer Checks Out With Promotion** 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.

Field	Value
Promotion	Buy Havenwood and save
Times	1
Time frame	At any time
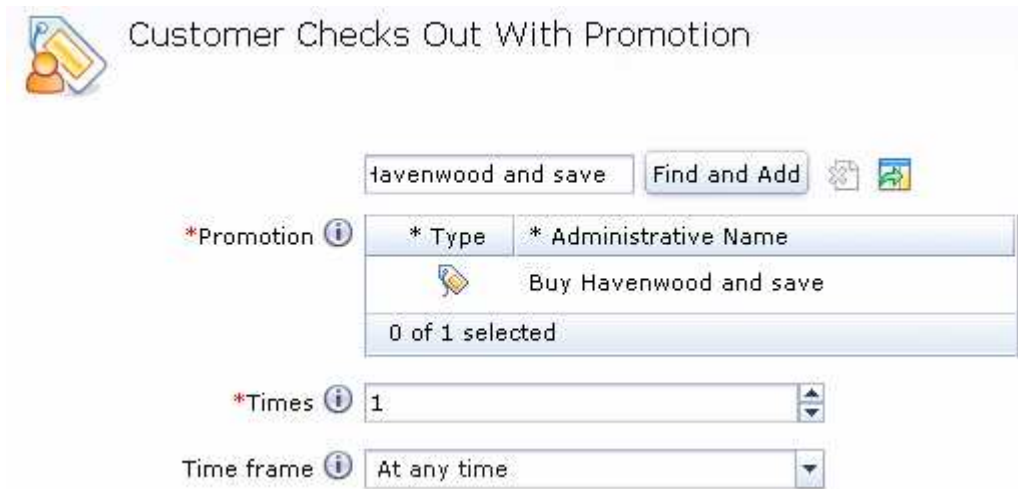
_____ 7.   Add the **Issue Coupon** action to the dialog activity following the **Customer Checks Out With Promotion** trigger.

_____ 8.   Click the **Issue Coupon** action to display its property panel.

_____ 9.   Type **10% off silverware** 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.

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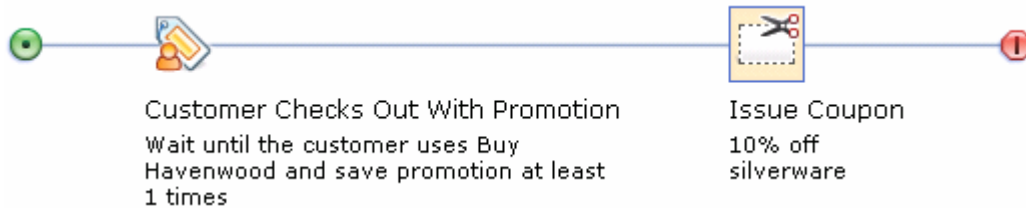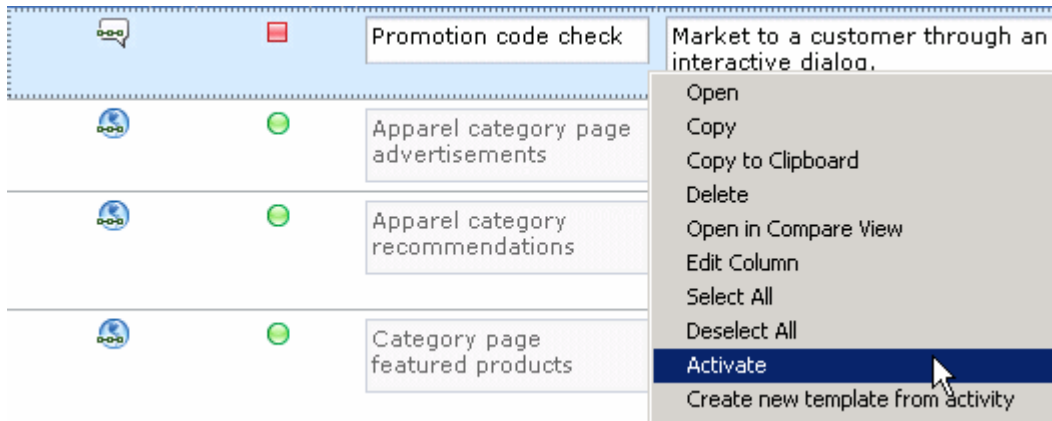
Part 3: Place a qualifying order

In this part of the lab, you will place an order using the target promotion selected for the dialog activity.

____ 1.   Launch the Madisons.

____ 2.   If you have an existing shopper account, login to the store. If not, register a new account with the store.

____ 3.   Navigate to **Tableware > Plates**.

____ 4.   Add the **"Havenwood"** dinnerware set to your shopping cart. You can select any combination of attributes.

____ 5.   Proceed to the shopping cart page. In the **Promotion code** field, enter the code **HAVEN10** and click **Apply**.

____ 6.   Complete the checkout process.

____ 7.   Your coupon is not issued right away. The Customer Checks out with Promotion trigger will occur in a five minute interval because the evaluation happens when the RaiseECEvent scheduled job runs. RaiseECEvent is set up by default to run every five minutes. While you are waiting, proceed with the next part of the tutorial.
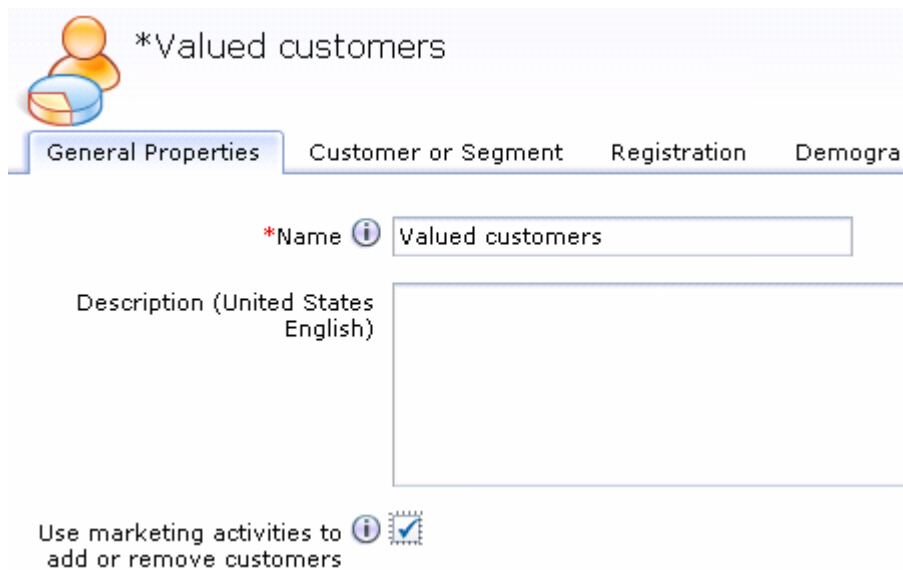
Part 4: Create a new customer segment

In this part of the lab, you will create a new dynamic customer segment that is populated by a dialog activity in a later part.

____ 1.   Open the Management Center **Marketing** tool.

____ 2.   Select **Customer Segment** from the Create New toolbar button.
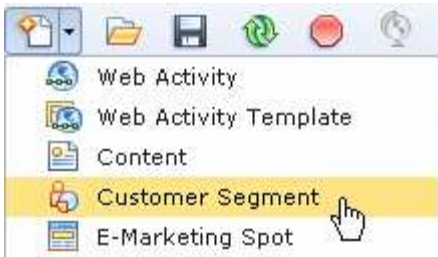
____ 3.   Name the segment **Valued customers** and select the **Use marketing activities to add or remove customers** check box.

____ 4.   Click **Save and Close**.

Part 5: Create a promotion for the customer segment

In this part of the lab, you will define a new promotion that is exclusive to the valued customers segment.

____ 1.   Open the Management Center **Promotions** tool.

____ 2.   Select the **Madisons** store.

____ 3.   Use the Create New toolbar button [icon] to create a new promotion. Accept the default selections in the promotion type selector. Click **OK**.

____ 4.   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	30% off orders over $500
Priority	300

__ 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.

Field name	Value
Minimum purchase condition	
• Minimum Order Purchase	500
• Percentage Discount on Order	30

__ c. In the **Target Customer Segment** section, enter the **Valued customers** segment and click **Find and Add**.

__ d. Click the **Descriptions** tab. Enter the values below:

Field name	Value
Customer viewable short description	30% off orders over $500

____ 5.   Save and activate the promotion.

__ a. Select **Save and Close**.

__ b. Select the **Promotions** folder in the Explorer View.

__ c. Find the **30% off orders over $500** promotion you just created. Right click and choose **Activate**.

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Part 6: Create a dialog activity to populate the customer segment

In this part of the lab, you will create a dialog activity to populate the new customer segment using the **Customer Checks Out With Promotion** trigger.

____ 1.   Open the Management Center **Marketing** tool.

____ 2.   Select the **Madisons** store

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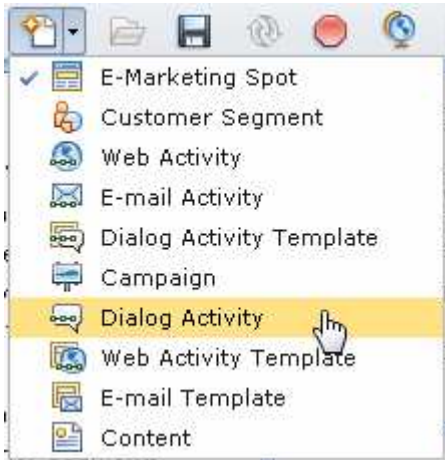

____ 4.   On the Dialog Activity General Properties tab, name your activity **Build customer segment.**

____ 5.   Add a **Customer Checks Out With Promotion** trigger into the empty activity.

____ 6.   Click the **Customer Checks Out With Promotion** 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.

Field	Value
Promotion	Free gift with orders over $100
Times	1
Time frame	At any time

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_____ 7. Add the **Add To or Remove From Customer Segment** action to the dialog activity following the **Customer Checks Out With Promotion** trigger.

_____ 8. Click the **Add To or Remove From Customer Segment** action to display its property panel.

_____ 9. Type **Valued customers** 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.
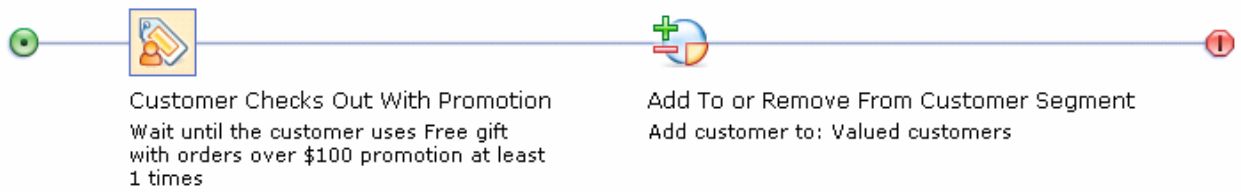
_____ 11. Open the Activities list and **activate** your new activity.

Part 7: Test your dialog activities

In this part of the lab, you will finish testing the first dialog activity you created and place an order in the store to test the second dialog activity.

____ 1. Launch the **Madisons** store.

____ 2. Log in using the same shopper account you used in Part 3.

____ 3. Complete the testing for the dialog activity that issued a coupon.

 __ a. Navigate to the **My Account** page.

 __ b. Select the **My Coupons** link on the left sidebar.

 __ c. You should have been issued the **10% off silverware** coupon from the order you placed in Part 3.

My Coupons		
COUPON	**EXPIRATION DATE**	
10% off silverware	Jun 20, 2011	Remove

____ 4. Place an order to qualify for the **Valued customers** customer segment.

 __ a. Add one or more products to your cart that total more than $100.

 __ b. On the shopping cart page, make sure you are receiving the free gift promotion

__ c. Complete the checkout process and submit the order.

____ 5. Verify you have been added to the customer segment. Similar to the coupon being issued, you will need to wait for the scheduled jobs to run before you are added to the customer segment and qualify for the new promotion. The Customer Checks out with Promotion trigger will occur in a five minute interval because the evaluation happens when the RaiseECEvent scheduled job runs. RaiseECEvent is set up by default to run every five minutes. While you are waiting, you can add products totaling $500 or more to your shopping cart and verify that the 30% off promotion is not applied.

__ a. Open the Management Center **Marketing** tool.

__ b. Open the **Build customer segment** activity.

__ c. When the activity has been evaluated you will see a Customer count of 1 as shown in the screen capture below.
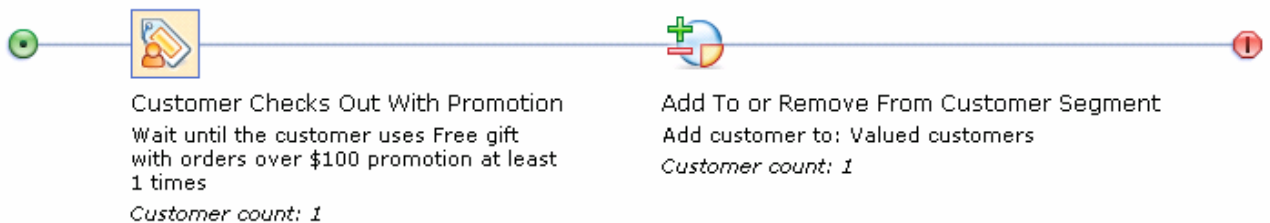
__ d. Place an order worth more than $500 and verify the 30% off promotion is applied. You can find it in the **Discount** line on the shopping cart page.

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Part 8: What you did in this exercise

In this tutorial you learned how to use the new **Customer Checks Out With Promotion** trigger to create marketing initiatives that respond to specific promotion usage within a store.

You should now understand how to complete this task:

- Target specific promotion usage using a dialog activity

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