IBM® WebSphere® Commerce 7 – Lab exercise

Precision marketing

What this exercise is about

In this tutorial, you will use the Management Center Marketing and Promotions tools to create a Web activity and a Dialog activity. The steps you go through to create these activities will demonstrate many of the new Management Center features.

The Web activity you will create advertises one of two different promotions. If the shopper has browsed both the desk lamps and table lamps categories, the advertised promotion will be for 25% off a desk lamp and a desk when you buy both. This promotion has a maximum discount of $100. Shoppers that do not meet the catalog browsing requirements are shown a discount for a free gift with a $1000 purchase. Shoppers that do meet the browsing requirement are shown both promotions.

The Dialog activity encourages new customers to place a large order within one week of registering. Any newly registered customer who spends $500 within 7 days of registering is added to a customer segment that is entitled to $50 off furniture. Since this promotion has the potential to overlap with the desk and desk lamp promotion, best deal support is configured to ensure the shopper gets the best value.

What you should be able to do

After completing this exercise, you should be able to:

- Create a "percent off multiple items" promotion

- Use the maximum discount amount and choice of free gift promotion features

- Use the online behavior-based Web activity targets

- Create a Dialog activity

- Configure WebSphere Commerce to track online behavior

- Configure best deal support

Introduction

The following naming conventions are used in the exercises:

Reference Variable	Description
<WCDE_INSTALL_DIR>	WebSphere Commerce Developer installation directory
<WCDE_HOST>	Hostname for WebSphere Commerce Developer
<LAB_FILE_DIR>	Location lab files were extracted to

The .zip file file, PrecisionMarketingLab.zip, provided with this lab contains the new file necessary to complete this lab.

Requirements

Before beginning this lab, ensure you have:

- Installed WebSphere Commerce Developer 7.0

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Part 1: Create the "25% off desk and desk lamp" promotion

In this part of the lab, you will create the promotion for 25% off a desk and desk lamp when you buy both. The discount limit is $100. In later parts you will set up a Web activity to advertise this promotion.
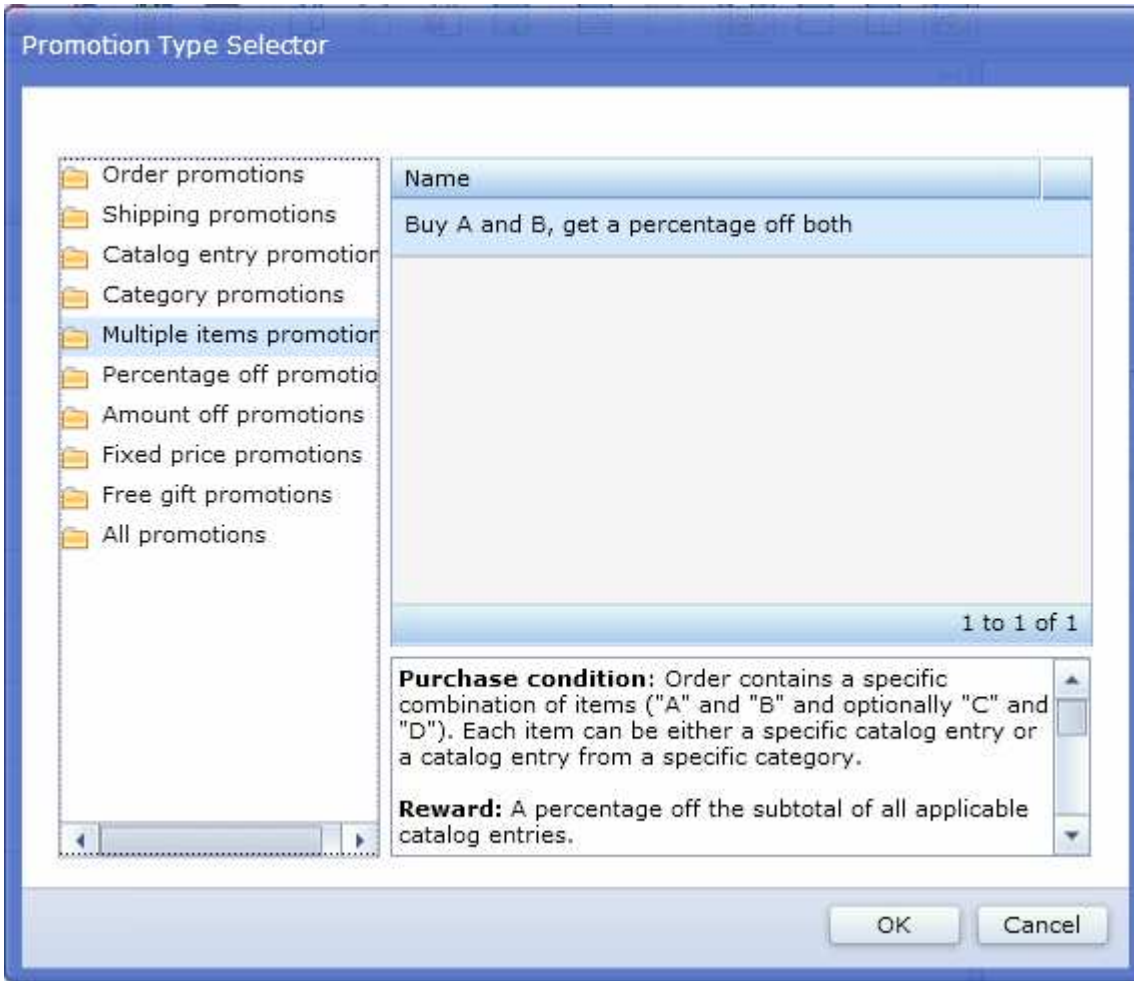
____ 1. Launch Management Center from **https://<WCDE_HOST>:8000/lobtools .**

____ 2. Open the **Promotions** tool.

____ 3. Select the **Madisons** store.
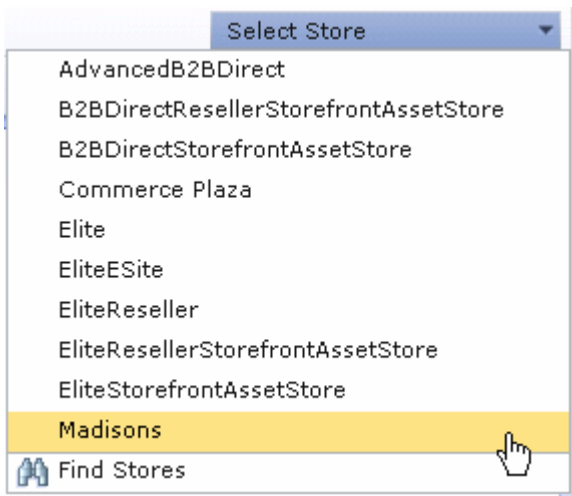
____ 4. Use the Create New toolbar button to create a new promotion. Select **Multiple items promotion** from the promotion type selector.

_____ 5. Select **Buy A and B, get a percentage off both**. Complete the promotion fields as outlined below.

__ a. In the **Promotion Properties** section, enter these values:

Field name	Value
Administrative name	Desk and lamp promotion
Priority	999

__ 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
Definition for "A"	Catalog entries from a specific category
Categories for "A"	Desks
Definition for "B"	Catalog entries from a specific category

Categories for "B"	Desk Lamps
Percentage discount off each combination	25
Maximum discount amount	100

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

Field name	Value
Customer viewable short description	Buy a desk and a desk lamp, save 25%.

__ d. Click **Save and Close.**

__ e. Activate the promotion.

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Part 2: Create the "Spend $1000, get a free gift" promotion

In this part of the lab, you will create another discount, spend $1000 at Madisons and get a free gift. This discount will also be promoted by a Web activity and demonstrates the new free gift selection for promotions.

____ 1. Create a new Promotion and select **Free gift promotions** from the promotion type selector.

____ 2. Select **Free gift with an order**. Complete the promotion fields as outlined below.

 __ a. In the **Promotion Properties** section, enter these values:

Field name	Value
Administrative name	Free gift with $1000 purchase
Priority	999

 __ 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. Use the **Find and Add** button to add the free gift catalog entries**.**

Field name	Value
Minimum purchase order	1000
Free gift options	Customer can choose free gifts from a list
Free gift catalog entries	TATEP-0201, KICO-0201, KIFR-0301, FUDEL-0701

Free gift options   ○ Free gifts are automatically added to shopping cart

      ● Customer can choose free gifts from a list

FUDEL-0701   [Find and Add]

*Free gift catalog entries ⓘ

* Type	* Code	Type a keyword in the field and click Find and Add. More details...
‖‖‖	TATEP-0201	
‖‖‖	KICO-0201	
‖‖‖	KIFR-0301	Ultra-Deluxe Frying Pan
‖‖‖	FUDEL-0701	Brushed Steel Lamp

                           1 to 4 of 4

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

Field name	Value
Customer viewable short description	Free gift when you spend $1000.

 __ d. Save and activate the promotion.

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Part 3: Create promotion content

In this part of the lab, you will create the promotion Content that will be displayed in the store. Content needs to be created for both promotions. For the purposes of this lab, you will create simple text content.

____ 1.   Open the Management Center **Marketing** tool and select the **Madisons** store.

____ 2.   Select **Content** from the Create New toolbar button.
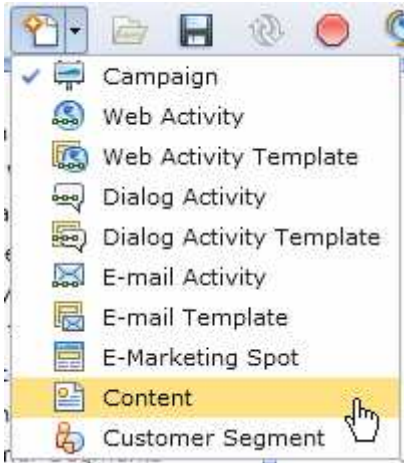
____ 3.   Create new content for the desk promotion.

Field name	Value
Name	Desk promo content
Content type	Text for store page display
Text	Buy a desk and desk lamp, save 25% off both.
Click action for link	Predefined click action for a promotion

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

____ 5.   Repeat the process to create new content for the free gift promotion using the values in the table
             below.

Field name	Value
Name	Free gift promo content
Content type	Text for store page display
Text	Spend $1000 at Madisons and receive a free gift.
Click action for link	Predefined click action for a promotion

*Name ⓘ Free gift promo content

Content type Text for store page display ▾

Text (United States English) Spend $1000 at Madisons and receive a free gift.

Click action for link ⓘ Predefined click action for a prom ... ▾

Predefined click action for a
promotion Display promotion description ▾

*URL ⓘ DiscountDetailsDisplayView?code=#promoName#&catalogId=#catalogId#&storeId=#storeId#&pStore

____ 6.   Click **Save and Close.**

Part 4: Create the Web activity

In this part of the lab, you will create the Web activity that determines when to display each promotion. This Web activity makes use of some of the new online behavior-based targets. It also makes use of the new branching option.

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

____ 2.   Define the Web activity general properties as shown in the screen capture.

____ 3.   Select the E-Marketing spot trigger and enter **RightSidebarAds** in the text field. Click **Find and Add.**

____ 4.   Add a branch to the Web activity flow editor immediately after the E-Marketing spot. Enter the branch properties as shown below.

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_____ 5.   Create the Desk and lamp promo path.

   __ a. Add a **Current Page** target to the beginning of the path.

   __ b. Select the values shown below and add the categories **Furniture**, **Desks** and **Desk Lamps**. A
         customer must be viewing one of these category pages to see the desk and desk lamp
         promotion.

   __ c. Add a **Catalog Browsing Behavior** target immediately following the Current Page target.

   __ d. Select the values shown below and add the categories **Table Lamps** and **Desk Lamps**. Note
         that the shopper must view each of these categories once before they see the promotion
         recommendation.

__ e. Finally, select the **Recommend Promotion** action. The promotion recommendation should be the last element in this path. Enter the promotion and content values shown below.

____ 6. Create the free gift promotion path. This path has no additional targets so you just need to specify the recommended promotion.

__ a. Select the **Recommend Promotion** action in the **Free gift promo** path. Enter the promotion and content values shown below.

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Recommend Promotion

*Promotion ⓘ	* Type	* Administrative Name
	🏷	Free gift with $1000 purchase
		1 to 1 of 1

gift promo content   [Find and Add] 🔳 🔳 🔳

*Content ⓘ	* Type	* Name
	📄	Free gift promo content
		1 to 1 of 1

____ 7.   The completed Web activity should look like this.

____ 8.   Save and activate the Web activity.

Activities - List

* Type	Status	* Name	Description
		recommendations	that satisfies the chosen target conditions.
🌐	🟥	Right Sidebar promotions	Promotions for the right sidebar E-marketing spot.
🌐	🟢		l store advertisements
🌐	🟢		mend a product to a customer tisfies the chosen target ons.
🌐	🟢		mend a product to a customer tisfies the chosen target

Open
Copy
Copy to Clipboard
Delete
Edit Column
Select All
Deselect All
Activate
Create new template from activity

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Part 5: Configure the server to track online behavior

In this section, you will configure your WebSphere Commerce test environment to track online behavior of shoppers. This step is necessary for the Catalog Browsing Behavior target to work.

____ 1.   Open WebSphere Commerce Developer and expand the **WC** project.

____ 2.   Expand the **xml** and **config** folders and open the file **wc-server.xml**. Expand the **config**, **InstanceProperties** and **SessionManagement** nodes.
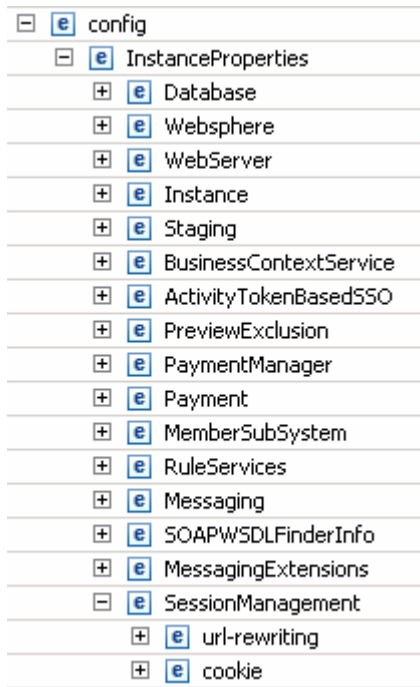
__ a. Enable PersistentSession and PersonalizationId by setting the enable attribute to true for each.

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__ b. Switch to the **Source** view of the file. Enable the SensorEventListener by setting its enable attribute to true.

```
<component
compClassName="com.ibm.commerce.marketing.dialog.trigger.SensorEventL
istener"
enable="true" name="SensorEventListener">
      <property display="false">
        <start enabled="true" />
      </property>
</component>
```

____ 3.   Stop and restart your WebSphere Commerce test server.

Part 6: Test the Web activity

In this section, you will test the new Web activity and promotions.

____ 1.   Open the Madisons store using the URL
http://<WCDE_HOST>/webapp/wcs/stores/servlet/Madisons/index.jsp.

____ 2.   Navigate to the Table Lamps category. You should see the free gift with $1000 purchase promotion displayed in the right sidebar.

____ 3.   Navigate to the Desk Lamps category. Now that you have visited both the Table Lamp and Desk Lamp categories you should see the desk and lamp promotion in the right side bar and the free gift promotion.
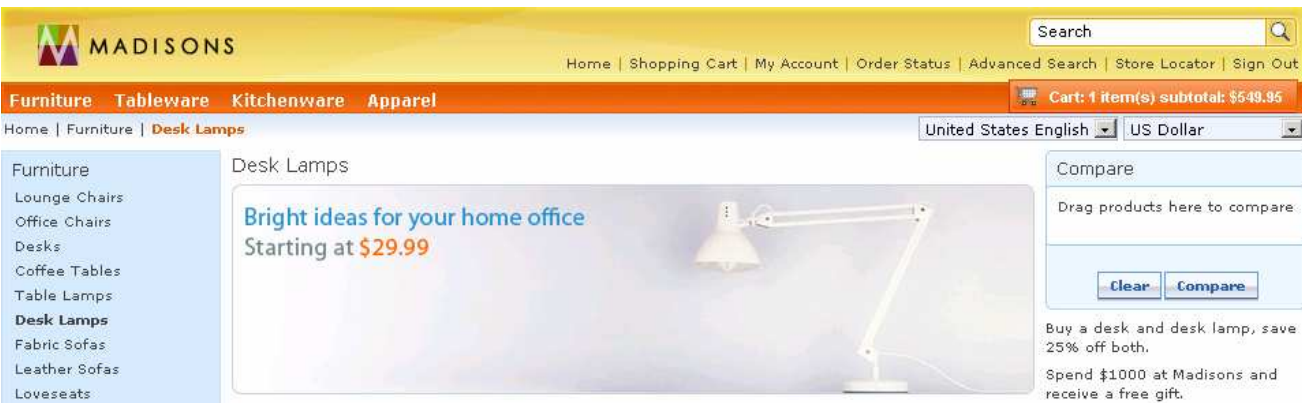
____ 4.   Navigate to the Desks and Furniture categories to ensure the desk and desk lamp promotion is displayed. Try another category and you should only see the free gift promotion.

____ 5.   Navigate to the Desks category and add the **Executive Six-Drawer Desk** to your cart.

____ 6.   Navigate to the Desk Lamps category and add the **Banker's Desk Lamp** to your cart.

____ 7.   Go to the shopping cart page. The desk and desk lamps promotion has been applied to your order. A discount of 25% on this order is $432.49. Since this exceeds the discount limit, the maximum discount amount of $100 has been applied.

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Shopping Cart

◉ 🌐 Shop Online   ○ 🏪 Pick Up at Store

PRODUCT		AVAILABILITY	QTY	EACH	TOTAL
	Executive Six-Drawer Desk	In-Stock	1	$1,599.99	$1,599.99
	✖ Remove ➕ Move to Wish List				
Buy a desk and a desk lamp, save 25%.					($92.49)
	Banker's Desk Lamp	In-Stock	1	$129.95	$129.95
	✖ Remove ➕ Move to Wish List				
Buy a desk and a desk lamp, save 25%.					($7.51)

Free gift when you spend $1000.

Select your free gift

Promotional code: [   ] **Apply**

Order Subtotal:	$1,729.94
Product Discounts:	($100.00)
Discount:	$0.00
Order Total:	**$1,629.94**

Part 7: Create the "Furniture promotion group" customer segment

In this part of the lab, you will create a customer segment that will be updated by a Dialog activity and used to entitle a promotion.

____ 1.   If you have closed Management Center, launch it again using the URL
https://<WCDE_HOST>:8000/lobtools .

____ 2.   Open the Marketing tool and select **Customer Segment** from the **Create New** toolbar button.

____ 3.   Fill in the customer segment properties as shown below. Make sure you check the **Use marketing activities to add or remove customers** box.

____ 4.   Save and close the customer segment.

Part 8: Create the Dialog activity

In this part of the lab, you will create a Dialog activity. The dialog tracks new customers and entitles those who spend $500 within one week of registering to a promotion of $50 off furniture.

____ 1.   Select **Dialog Activity** from the **Create New** toolbar button and choose the **Blank Dialog Activity** template.

____ 2.   Name the Dialog activity **New customer orders**.

____ 3.   Add the **Customer Registers** trigger to the activity. There are no properties to set for this trigger.

____ 4.   Add the **Wait** trigger following the **Customer Registers** trigger. In the properties panel, set the wait time to 7 days. You will see in a later part how to test wait triggers without waiting the allocated time.
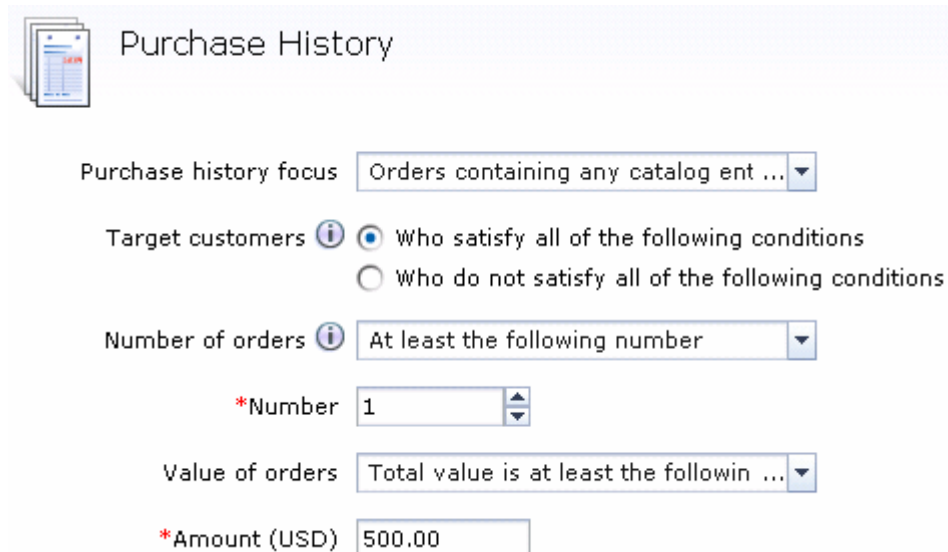
____ 5.   Add a **Purchase History** target after the **Wait** trigger. This target will test whether the shopper has spent $500 at the store. Set the **Value of orders** field to **Total value is at least the following amount**. Set the **Amount** field to **500**.

____ 6.   The final step in this dialog is the **Add to or Remove From Customer Segment** action. Add this action to the end of your activity. In the properties panel, add the segment you created in Part 7. The name of the segment is **Furniture promotion group**.

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_____ 7. The completed activity looks like this:
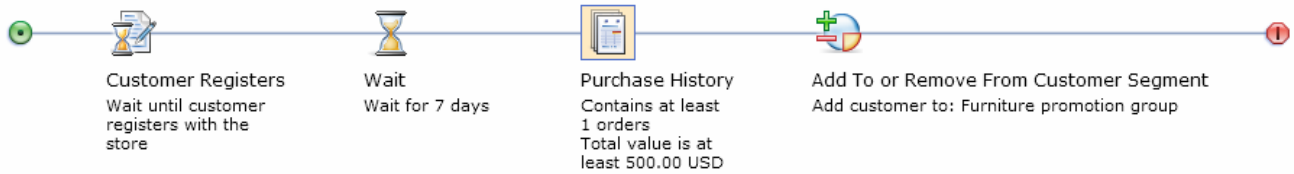
_____ 8. Save and close your Dialog activity and then activate it.

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Part 9: Create the "$50 off furniture" promotion

In this part of the lab, you will create the promotion that gives members of the **Furniture promotion group** segment $50 off furniture. Depending on what items are purchased, either this promotion or the 25% off desk and desk lamp promotion created in Part 1 may be the better value for the customer. This promotion will have the same priority and the best deal feature will be configured in the next part to ensure the customer always gets the best value.

____ 1.   Create a new Promotion and select **Amount off promotions** from the promotion type selector.

____ 2.   Select **Amount off the subtotal of catalog entries from a category**. Complete the promotion fields as outlined below.

    __ a. In the **Promotion Properties** section, enter these values:

Field name	Value
Administrative name	Furniture promo
Priority	999

    __ 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. Use the **Find and Add** button to add category**.**

Field name	Value
Categories	Furniture
Minimum purchase (quantity)	1
Amount off	50

    __ c. In the **Target Customer Segment** section, add the **Furniture promotion group** segment.

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

Field name	Value
Customer viewable short description	Save $50 on furniture.

____ 3.   Save and activate the promotion.

Part 10: Configure best deal and wait trigger testing parameters

In this section, you will enable the best deal feature in your WebSphere Commerce test environment. You will also set up testing parameters for Dialog activity wait triggers.

____ 1.   Enable best deal support.

   __ a. Open WebSphere Commerce Developer and expand the **WC** project.

   __ a. Navigate to **WC > xml > PromotionEngineConfiguration** and open the file
   WCSPromotionEngineConfig.xml.
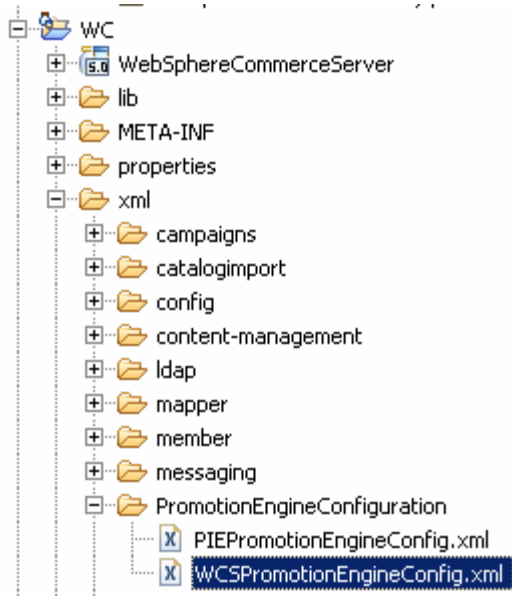
   __ b. Make sure the **Design** tab is selected. Expand the **PromotionEngine** and **DefaultBehavior**.
   Nodes.

   __ c. Locate the element **EvaluationFlowControl** and set its value to **1**. This element turns on best
   deal support.

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⊟ **e** DefaultBehavior		
e StatelessInvocation	true	
e CheckTargetingAtRuntime	true	
e SkipTargetingOnCodeEntered	true	
e PriceAdjustmentBasedOnStandardOfferPrice	true	
e Debug	false	
e EvaluationFlowControl	1	
e SequenceCombinationLimit	50	

__ d. Save and close the file.

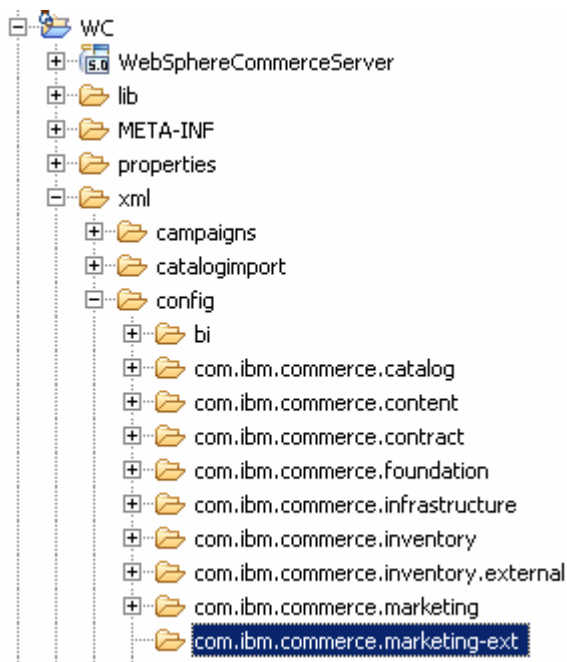____ 2. Enable wait trigger testing.

__ a. Navigate to **WC > xml > config**.

__ b. If it does not exist, create the folder **com.ibm.commerce.marketing-ext.**

⊟ 📂 WC
   ⊞ 🖥 WebSphereCommerceServer
   ⊞ 📂 lib
   ⊞ 📂 META-INF
   ⊞ 📂 properties
   ⊟ 📂 xml
      ⊞ 📂 campaigns
      ⊞ 📂 catalogimport
      ⊟ 📂 config
         ⊞ 📂 bi
         ⊞ 📂 com.ibm.commerce.catalog
         ⊞ 📂 com.ibm.commerce.content
         ⊞ 📂 com.ibm.commerce.contract
         ⊞ 📂 com.ibm.commerce.foundation
         ⊞ 📂 com.ibm.commerce.infrastructure
         ⊞ 📂 com.ibm.commerce.inventory
         ⊞ 📂 com.ibm.commerce.inventory.external
         ⊞ 📂 com.ibm.commerce.marketing
         📂 com.ibm.commerce.marketing-ext

__ c. Within the com.ibm.commerce.marketing-ext folder, create the file **wc-admin-component.xml.**

__ d. Create the file as shown below. For your convenience, the contents of this file are provided in the directory **<LAB_FILES_DIR>/PrecisionMarketing/com.ibm.commerce.marketing-ext.** You can change the value of the timedEventTestInterval property if you want to have a longer delay before the trigger is fired.

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```
<_config:DeploymentConfiguration
    xmlns:_config="http://www.ibm.com/xmlns/prod/commerce/foundation/config"
    xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    xsi:schemaLocation="http://www.ibm.com/xmlns/prod/commerce/foundation/config ../xsd/wc-admin-component.xsd">

    <_config:extendedconfiguration>
        <_config:configgrouping name="MarketingRuntime">

            <!-- should Timer triggers be in test mode -->
            <_config:property name="timedEventTest" value="true"/>

            <!-- the number of minutes that should elapse before the Timer trigger is fired, -->
            <!-- regardless of when it is actually supposed to be scheduled -->
            <_config:property name="timedEventTestInterval" value="1"/>

        </_config:configgrouping>
    </_config:extendedconfiguration>

</_config:DeploymentConfiguration>
```

_____ 3.   Save and close the file.

_____ 4.   Stop and restart your test server.

Part 11: Test the Dialog activity

In this section, you will test the new Dialog activity and best deal support.

____ 1. Open the Madisons store using the URL
http://<WCDE_HOST>/webapp/wcs/stores/servlet/Madisons/index.jsp.

____ 2. Register a new customer and place an order worth more than $500.

____ 3. You now need to wait for the Dialog activity triggers to be fired. Even though you sped up the wait trigger, there is still a scheduled job called SendMarketingTriggers that runs once every 30 min. This job needs to run once to fire the Customer Registers trigger and then it runs again in 30 min to fire the Wait trigger. This means it will take between 30 and 60 minutes for the promotion to be entitled. You can switch to other testing during this time or you can optionally increase the frequency of the SendMarketingTriggers job. Instructions can be found in the Information Center here: http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/index.jsp?topic=/com.ibm.commerce.admin.doc/tasks/tsbschedsndtriggers.htm

____ 4. A simple way to test whether the promotion has been entitled is to check the customer count statistics for the Dialog activity.

   __ a. Log into Management Center and open the Marketing tool.

   __ b. Open the Dialog activity. It was called **New customer orders**. Do not deactivate the activity, just open it in read only mode. The counters show you how many customers have reached each stage of the activity. When the count is 1 for each step in the Dialog, the activity is complete for that shopper.
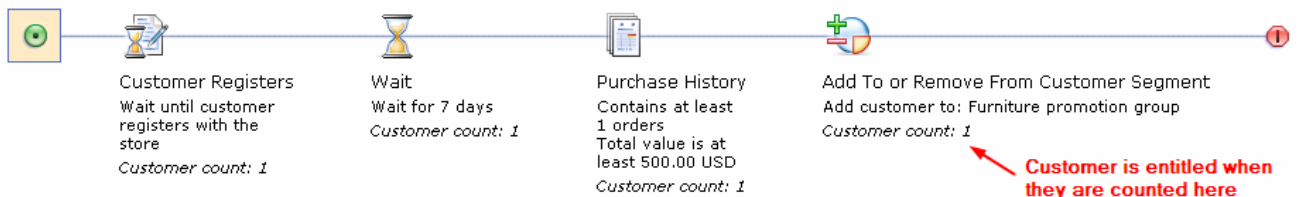
____ 5. Once the customer has been added to the **Furniture promotion group** segment you can continue testing the best deal feature.

   __ a. Navigate to the **Furniture > Desks** category and add the **Craft Table** to your shopping cart.

   __ b. Navigate to the **Furniture > Desk Lamps** category and add the **Banker's Desk Lamp** to your shopping cart. This combination qualifies for the desk and desk lamp promotion you created in Part 1. Notice that the promotion is applied in your shopping cart and the $50 off furniture is not applied. This is because the total savings with the desk and desk lamp promotion is $57.49, a better deal.

__ c. Remove the **Banker's Desk Lamp** from your cart. You can see the $50 off furniture discount being applied once the desk lamp has been removed.

__ d. Navigate to **Furniture > Desk Lamps** and add the **Gooseneck Desk Lamp** to your shopping cart. This combination would also qualify for the desk and desk lamp promotion but notice that the $50 off furniture promotion is applied instead. In this case, the total of the desk and lamp comes to $119.98. With the 25% off promotion, the discount would be $30 so here the $50 off furniture promotion is the better deal.

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Shopping Cart

◉ 🌐 Shop Online   ○ 🏪 Pick Up at Store

PRODUCT		AVAILABILITY	QTY	EACH	TOTAL
	Craft Table SKU: FUDE-0201 ✖ Remove ➕ Move to Wish List	In-Stock	1	$99.99	$99.99
Save $50 on furniture					($41.67)
	Gooseneck Desk Lamp SKU: FUDEL-0301 ✖ Remove ➕ Move to Wish List	In-Stock	1	$19.99	$19.99
Save $50 on furniture					($8.33)

Promotional code: [＿＿＿＿] **Apply**

Order Subtotal: $119.98
Product Discounts: ($50.00)
ⓘ Discount: ($7.00)
Order Total: **$62.98**

Part 12: What you did in this exercise

In this tutorial you learned how to use the new Precision Marketing features. You also saw many of the new Promotions features

You should now understand how to complete these tasks:

- Create a "percent off multiple items" promotion

- Use the maximum discount amount and choice of free gift features

- Use the online behavior-based Web activity targets

- Create a Dialog activity

- Configure WebSphere Commerce to track online behavior

- Configure best deal support