UBX integration with WebSphere Commerce

The purpose of this document is to give you a step by step look at integrating UBX and WebSphere Commerce. Most of these steps are documented in the knowledge center, but hopefully the add screenshots here most things a little clearer and easier.

WebSphere Commerce Knowledge Center

https://www.ibm.com/support/knowledgecenter/SSZLC2_8.0.0/com.ibm.commerce.integration.doc/co ncepts/ccvubx.htm

Registering Endpoint:

https://www.ibm.com/support/knowledgecenter/SSZLC2_8.0.0/com.ibm.commerce.integration.doc/tas ks/tcvubxregister.htm

Registering the WebSphere Commerce Endpoint requires access to the Universal Behavior Exchange server UI and an admin User ID and password.

Select Endpoints tab:

😑 IBM Universal Behavi	or Exchange			G t	Refresh 🖂 Messages 🗸 😩 i	\sim ? Help \sim IBM.
Dashboard Event	s Audience Endpoints					
Welcome, admin						⑦ Last refresh: 8/3/2017, 2:05:51 PM <i>Ċ</i>
Currently showing summa	ry data for the previous 7 days					🕜 7 days 🗸
Events summary	0 Published ⑦	0 Received ⑦	Audiences summary	0	6 of 18 Completed (7)	12 of 18 Failed ⑦
Events (?) Event publisher All	Events	\rightarrow	Event subscriber	Audiences (?) Audience publisher Display All V Namber of audie	nces 🗸>	Audience destination

Click Register new endpoint

≡	IBM Universal Behavior Exchange		C'Refresh 🖂 Messages 🗸 🚇	~	? Help \checkmark	IBM.
	Dashboard Events Audiences Endpoints					
	💱 Riegister new endpoint 🛛 U endpoints 🗸			Q,	Selection actions	s 🗸]
	Endpoint name	Status	Description	Events	Audiences	
	IBM WebSphere Commerce	Active	WebSphere Commerce is a single, unified e-commerce platform that offers the ability to do business c	●0 ○●	•∘1 ∘•0	:
	URX Test Drive Destination	• ••	Use this event/audience destination endpoint to Test Drive event and audience syndication			•

Select the IBM WebSphere Commerce provider

EIBM Universal Behavior Exchange		🔿 Refresh 🖂 Messages 🗸 🛞	\sim ? Help \sim IBM.
Endpoint registration			×
0			3
Select endpoint	Deployment details	Ri	egistration complete
Register an endpoint Select the endpoint you want to register for use in your UBX account. Use this wizard to provide information	that the endpoint provider requires. To request an endpoint that is not listed here, contact the l	JBX Provisioning Team by email.	
All providers 🗡			O
IBM Marketing Cloud Performance Insights IBM Details Details	IBM Mobile Customer Engagement	IBM Tealeaf CX on Cloud IBM Details	
IEM IBM Watson Marketing Insights IEM Details	IBM WebSphere Commerce	Innovid Video Marketing Platform Innovid Details	
Live Ramp - FTP	MedaMath Terminal One HedaNath	IBM NodeRedDemo	
Click Next			
			~
Endpoint registration	<u></u>		^
Select endpoint	2) Deployment details		Begistration complete
	TBM IBM WebSphere Commerce		
	The selected deployment does not prevent data from moving outside of your accorachic region.		
	websprise contrinercue The selected deployment does not prevent data from moving outside of your geographic region. Instructions: To registery your WebSphere Commerce solution as an endpoint in your UEX account, the following steps are needed:		
	webspire econtrine course The selected deployment does not prevent data from moving outside of your geographic region. Instructions: To register your WebSphere Commerce solution as an endpoint in your UEX account, the following steps are needed: Click Next to complete the registration request. The endpoint appears on the Endpoints tab as Pending. On the Endpoints tab as Pending. On the Endpoint tab, epen thesis, open Endpoint details for the endpoint that you Save the Endpoint tab, epen thesis. Open Endpoint details for the endpoint that you Save the Endpoint tab, epen thesis. Open Endpoint details for the endpoint that you Save the Endpoint tab, epen thesis. Open Endpoint details for the endpoint that you Contact Userprovident the provisioning process, please send email with subject? Need Account Authentication Key. To separate the provisioning process, please send email with subject? Need Account Authentication Key. To separate the provisioning process, please send email with subject? Need Account Authentication Key. To separate the provisioning Process, please send email with subject? Need Account Authentication Key. To separate the provisioning Provision Key		
	Websphere Contrine Case Websphere Contracts Case Case Case Case Case Case Case Cas		

Leave defaults and click Register

Close the "Thanks!, We Got it" screen.

You should now see your Endpoint in a Pending Status state.

Dash	board Events Audiences Endpoints						
88 R	agister new endpoint All endpoints 🗸				Q, [Selection actions	~
	Endpoint name	^	Status	Description	Events	Audiences	
	IBM WebSphere Commerce		Active	WebSphere Commerce is a single, unified e-commerce platform that offers the ability to do business c	●0 ○●	•∘1 ∘•0	•
	IBM WebSphere Commerce_2	\langle	Pending	WebSphere Commerce is a single, unified e-commerce platform that offers the ability to do business c	•0 0•	•○ 0 ○● 0	:
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Now we need to retrieve the EndPoint Authentication Key from the Endpoint Details:

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S R	sgister new endpoint 🛛 All endpoints 🗠			Q (2 Ater	m(s) selected	Selection actions	s ∨
	Endpoint name	^	Status	Description	Events	Audiences	
	IBM WebSphere Commerce		Active	WebSphere Commerce is a single, unified e-commerce platform that offers the ability to do business c	●-0 0.●	•∘1 ∘•0	:
~	IBM WebSphere Commerce_2		Pending	WebSphere Commerce is a single, unified e-commerce platform that offers the ability to do business c	●0 ○●	•∘0 ∘•0	:
	IBM UBX Test Drive Destination		Active	Use this event/audience destination endpoint to Test Drive event and audience syndication	• •• 0	Actions * Endpoint det * Delete endpoint	tails >

Endpoint details		×
IBM WebSphere Commerce_2 IBM		Pending
Details Identifiers		
Description WebSphere Commerce is a single, unified e- commerce platform that offers the ability to do business directly with consumers (B2C), directly with businesses (B2B), and indirectly through channel partners (indirect business models). WebSphere Commerce is designed to be a customizable, scalable, and high availability solution that is built to leverage open standards. WebSphere Commerce can leverage UBX by sharing information such as audience data, which can then be used by other solutions such as IBM Digital Analytics. Endpoint authentication key (?) a1d55571-ba9c-405f-950b-1f32a97b8209:US	●-○ Publisher	୦-● Destination ଝୁରୁ 0 audiences
X Delete III Disable		Close

Copy this Endpoint authentication key, you will need this later when configuring the transport in WebSphere Commerce. You can close this screen once you've copied the key.

Now that the Endpoint is registered in UBX, we need to create a Transport and Scheduler job in the WebSphere Commerce AdminConsole that will run and activate the Endpoint.

https://www.ibm.com/support/knowledgecenter/SSZLC2_8.0.0/com.ibm.commerce.integration.doc/tas ks/tcvubxtransport.htm

Access your Websphere Commerce Adminconsole:

https://<hostname>:8002/webapp/wcs/admin/servlet/ToolsLogon?XMLFile=adminconsole.AdminConsoleLogon

Select Store that your working with.. In this example, we are using the AuroraESite:

IBM WebSphere Commerce		
Administration Console Site/Stor	e Selection	
Select the site/stores that you want to wo Site Store	ik on	
Store name AuroraB2BESite AuroraB2BEStorefrontAssetStore AuroraEstorefrontAssetStore Extended Sites Catalog Asset Store Language to work in United States English V	Find a store Store name Ignore case, beginning with V Find List All	

Click OK

Under Configuration menu, select Transports

Select > AuroraStorefrontAssetStore - United States English		
Access Management Monitoring Configuration Help		
Logout > Home > Transports		
Transport Configuration	Page Number 1 Go	
Number of items: 0	" First 1 of 1 Last "	
Currently there are no transports assigned or configured. Select the add button on the right to add transports.	\langle	Add Configure Change Status

Select Add create a transport for UBX

	Access Management	Monitoring	Configuration	Help			
	Access Hanagement		configuration	Theip			
	Logout > Home > Trans	ports > Add Tra	nsport				
	Add Transport						
					I	Page Number 1 Go	
	Number of items: 19)				" First 1 of 1 Last "	
					1		
	Available Transports	5			Description		Add
	E-mail				E-mail sender		Create
	File				File Writer		Calicel
	IBM MQ				IBM MQ		
	Sample adapter				Sample adapter		
	DemandTec SFTP				DemandTec SFTP connection settings		
	Commerce Insights SFT	ГР			Commerce Insights SFTP connection settings		
	НТТР				нттр		
	Webservices over HTTP				WebServices over HTTP		
	Webservices over JMS				WebServices over JMS		
	SMS HTTP				SMS HTTP adapter		
	SMS Webservices				SMS Webservices adapter		
	Silverpop				Send transactional emails with Silverpop Transact		
Q	UBX Integration	\geq			Configuration for UBX integration		
	Success360				Success360 Integration Settings		
	T	L L			And the formation of th		

Select UBX Integration and click Add

Now we need to configure the transport that was just added:

Access Management Monitoring Co	onfiguration Help		
Logout > Home > Transports			
Transport Configuration		Page Number	1 Go
Number of items: 2		" First 1 o	of 1 Last **
Name	Description	Transport Status	Add
E-mail	E-mail sender	Active	Configure
UBX Integration	Configuration for UBX integration	Active	Configure
			Change Status
Access Management Monitoring Co	onfiguration Help		
Least a Home a Transporte a Configure Te			
Logout > Home > Transports > Configure Tr	ansport		OK Cancel
Transport Configuration Para	meters		
UBX Integration			
Parameter	Value		
WebSphere Commerce Application ID	7d82e2e4-46cf-4234-a81e-dcba4861344a		
WebSphere Commerce Deployment ID	webspherecommerce		
Endpoint Authentication Key	•••••••••••		
UBX REST URL	https://api.ubx.ibmmarketingcloud.com		

This is where you will need to insert the Endpoint Authentication Key you copied earlier from UBX.

NOTE: Ensure the UBX Rest URL is correctly populated here. The default URL is an example for a pilot system, please change to the valid REST host name URL. Also, you will notice in the Knowledge center documentation the Account Authentication Key parameter with 8.0.3.0. This is only needed for 8.0.3 environments as you will notice it's not displayed in this 8.0.4 environment.

Next, lets create the scheduler job that activates the endpoint and will also be the job that sends updated customer segments across to the UBX server.

https://www.ibm.com/support/knowledgecenter/SSZLC2_8.0.0/com.ibm.commerce.integration.doc/tas ks/tcvschedcustomersegmentubxintegrate.htm

Under Configuration menu, select Scheduler and select New to add a job:



Fill in the approiate fields:

Access Management Monitoring Configuration Help	
Logout > Home > Scheduler > New	
	OK Cancel
New Scheduled Job Job command CustomerSegmentUBXIntegrate V Job parameters	
Year Month Day Start bate 2017 08 02 III Fixed Time	
Allowed host	
Actreduler interval 1800 Job attempts Seconds to retry Seconds to retry Run only once v Job priority (1 is lowest, 10 is highest) 5 v Application type v Task to check if processing needed Always Run The Command v	

Ensure the Associated User is your WebSphere Commerce admin user. In this example I've set the job to run every 30 mins, you can adjust this interval to your desired setting.

Once the job completes successfully:

Access Management Monitoring Configuration	Help	
Logout > Home > Scheduler		
Scheduler Status Display		
		Page Number 1 Go
Number of items: 2		" First 1 of 1 Last "
Date range: Start time 8/2/17 12:00 AM		Date Range
Command Job parameters	State	Status Start Finished Application New
	Complete	8/2/17 8/2/17 Change
	Complete	AM 10:29 AM Delete
CustomerSegmentLIBVIntegrate	Waiting	6/2/17 Remove Record
	waiting	AM Refresh

We can now validate in UBX that the endpoint is now "Active" instead of "Pending"

	Dashboard Events Audiences Endpoints					
Ī	Se Register new endpoint All endpoints V			O、 [Selection actions	~]
	Endpoint name	∧ Status	Description	Events	Audiences	
	IBM WebSphere Commerce_2	Active	WebSphere Commerce is a single, unified e-commerce platform that offers the ability to do business c	●0 0-0	•∘0 ∘•0	• •

Now that the Endpoint is active, you will need to Enable SSL for the UBX integration.

https://www.ibm.com/support/knowledgecenter/SSZLC2_8.0.0/com.ibm.commerce.integration.doc/tas ks/tcvubxconfig.htm

The steps for this are pretty straight forward and the above link is very clear. This is done in your WebSphere Application admin console. The only think to watch out for here is that you put the proper host name. Should be more like the following : api.ubx.ibmmarketingcloud.com

1. Expand Security. Click SSL certificate and key management.

- 2. In the **Related Items** section, click **Key stores and certificates**.
- 3. Select NodeDefaultTrustStore.
- In the Additional Properties section, click Signer Certificates.
 Click Retrieve from port and enter the following information.

Click Retrieve from port and enter the following information.						
Parameter	Value					
Host	api.ubx.ibmmarketingcloud.com					
Port	443					
SSL configuration for outbound connection	NodeDefaultSSLSettings					
Alias	UBX					
Click Retrieve signer information						

6. Click **Retrieve signer information**.

7. Select **OK** and save your changes.

At this point, your integration with UBX is complete and you can work with customer segments and import or export between UBX and WebSphere Commercer.

What to do next

After you enable UBX integration, you can work with customer segments in the Marketing tool to export information to external applications. This is done by selecting the **Allow exports to external applications** property when you create a customer segment. For more information, see <u>Creating a customer segment</u>.

Then, you can manage customer segments by importing and exporting them within UBX. For more information, see <u>Managing customer segments with UBX</u>.

Below is a exampe of Exporting a customer segment (source audience) from WCS to UBX.

Now that the integration is complete and the Endpoint is active, we can export a customer segment from our WCS to UBX. This is done in the UBX UI.

First, we need to make sure the customer segment is configured properly in WCS. When creating a customer segment you have to specific if you allow it to be exported to external applications. Once this is done, we should be able to see those segments in UBX.

Example showing some segments allow exports from Manager Center inside Marketing tool for store we would like to export customer segments from:

Management Center Too	ols						Welcome wca	dmin Log Ou	a IBM
Marketing ×						_			
File Edit View Help							uroraESite	$\mathbf{>}$	~
© ∋ ⊕ · ⊨ ଅ ୯ 0									Q ~
X Q. Search Results		Customer Se	gments - List			K 77 12 34	→ Utilit	Browse	×
Active Work	* Туре	Store \checkmark	* Name	Description	Allow exports to external applications $~~$				
Activity Templates	S	AuroraStorefrontAss etStore	Customers who are 40 years of age or older	Customers who are 40 years of age or older			Activities		~
Content Customer Segments	\$7	AuroraStorefrontAss etStore	Customers who are under 40 years of age	Customers who are under 40 years of age			Tune	Namo	Q
E-Marketing Spots	¢	AuroraESite	dilly dally				Type	Name	
Email Templates	50	AuroraStorefrontAss etStore	Female Customers	Registered customers who have identified themselves as females					
Search Rules	\$	AuroraStorefrontAss etStore	Guest Shoppers	Shoppers who have not registered with the store					
Customer Segment Exports	50	AuroraStorefrontAss etStore	Male Customers	Registered customers who have identified themselves as males					
	¢	AuroraESite	matty T						
	\$	AuroraStorefrontAss etStore	Registered Customers	Customers who have registered with the store					
	.	AuroraStorefrontAss	Repeat Customers	Customers who have placed at least one order					

Now, lets login to UBX and add a source audience to export.

					yoo . 🌒 nama		U 1000 -
Dashboard Events Audiences Entrpoints							
A Share audiences and identifiers Recent Historical Sche	duled						
Audience		Destination	Records matched	Status	Share type	Star 🗸	Completed
dilly dally IBM WebSchere Commerce 9	\rightarrow	test2 URX Test Drive Destination	N/A	Failed View details	Audience share	8/2/2017	8/2/2017

Select "Audiences" tab and click "Share audiences and identifiers"

Let's Share an audience to export

Share audiences and identifiers		
What w You can	would you like to do? n do either or both.	
		The local identifies to the URV Identity Plane
Use orm	e an audience that is defined in a source endpoint to create modify an audience in a destination endpoint.	Add identity data from an audience that is defined in a source endpoint to the Identity Store.
6	<u>∞</u> ⊆ → <u>∞</u>	$\underline{\&} \rightarrow \underline{\Box}$
Sec	ource UBX Destination	Source UBX

Click Next

Here you will select your Source audience, which is your customer segment from IBM WebSphere Commerce and then your destination you would like to export to in UBX. In this example, I'm using the IBM test drive destination. If your source audience isn't showing up, you may need to Refresh the list.

Here I've select to export my customer segment I created named UBX export Segment and I chose to export it to the IBM test drive and name is TEST Export.

Share audiences and identifiers		×
Choose an actor. Select audences Map source	to destination Solved. Le the action Select destination aptions	Summary
C Refresh the list of available source and destination audiences		
Source audience	Destination audience	Selected source audience
Q Search	Q, Search	UBX Export Segment IBM WebSphere Commerce
∨ IBM	∨ IBM	
V IBM WebSphere Commerce	> IBM WebSphere Commerce	Selected destination audience 3
dily dally (1)	VUBX Test Drive Destination	TEST Export UBX Test Drive Destination
Guest Shoppers	Create new audience	IBM BANG BOLK ADDIN
matty T (1)	TEST Export	
TEST UBX Segment (1)	newpatch teet	
UBX Export Segment		
> UBX Test Drive Publisher		
Previous		Next Cancel

Click Next

Here the only think you need to do is Map audience identifiers, they do need to match. The source and destination identifies.

Share audiences and identifiers					X
Choose an action	Select audiences	3 Map source to destinatio	on Schedule the action	Select destination options	Summary
	UBX Export Segment IBM WebSphere Commerce IBH Map marketing databases Source database IBM WebSphere Commerce Database	\longrightarrow	UBX Test Export UBX Test Drive Destination TBM Destination database TestDrive Dest		Selected source audience UBX Export Segment IBM VeSSphre Commerce IDM Identity scheme email
	Map audience identifiers Source identifier email C Do not add stored identifiers (?)		Destruction identifier Email)	Selected destrution audience TEST Export URX Test Drive Destruation IRM Lenally softeme Email
	Map audience attributes Source attributes Choose an attribute	\longrightarrow	Destination attributes Choose an attribute		
Previous					Next Cancel

Click Next

I chose to leave the defaults on the next screen and just clicked Next

Share audiences and identifiers					×
Choose an action	Select audiences	Map source to destination	3 Schedule the action	5 Select destination options	Summary
Share audiences and identifiers	Weeldays V San Mon Tue Wed Start date	Thu Fri Sat			Selected source audience UBX Export Segment IBM UBX/Sphere Commerce IBM Identity scheme email
Repeat forever Vis No Include all data (7) Vis No	End date TB Data range All data				Selected destination audience
					Scheduled Share audiences and identifiers Immediately Include all data Yes
Previous					Next

Again, here I'm going to be adding new records, so I leave the defaults and click Share

Share audiences and identifiers					×
Choose an action	Select audiences	Map source to destination	Schedule the action	5 Select destination options	Summary >>>
Specify how to modify TEST Export. (*) Add new records Perplace existing records Specify the minimum number of records. (*) 1 Add a note. (*) Optional. Add a descriptive note.					Selected source audience UKX Export Segment INVWSSShee Commerce Intel WWSSShee Commerce Intel Selected destination audience IKX Test Export UKX Test Drive Destination UKX Test Drive Destination UKX Test Drive Destination UKX Test Drive Destination Ernal Scheduld Share audiences and identifiers Immediately Include all data Yes
Previous					Share

After clicking the Share button, the export will start and you can monitor for it's completion on the following page

🗮 IBM Universal Behavior Exchange		C Refresh 📈 Mossages 🗸 🛞	►
Dashboard Events Audiences Endpoints			
2 Share audiences and identifiers Recent Historice	al Scheduled		Q
Audience	Destination	Records matched Status Share type	Star V Completed
IBM UBX Export Segment IBM WebSphere Commerce IBM		N/A Waiting to receive Audience sh	are 8/3/2017 Not complete

At this point, UBX is waiting for the "CustomerSegmentUBXIntegrate" scheduled job to run on WCS, to push the files up. After the scheduled job runs, if you refresh the status page, you will see that it completes. Depending on the interval you chose when creating the scheduled job, you may want to manually kick off the job at this point.

≡	IBM Universal Behavior Exchange			C	Pefresh	🖂 Messages 🗸 😩 🚥	Y	r ⑦ Help ∨	IBN
	Dashboard Events Audiences Endpoints								
	💩 Share audiences and identifiers Recent Historical Sc	neduled							_0
	Audience		Destination	Records matched	Status	Share type	Star 🗸	Completed	
	UBX Export Segment IBM WebSphere Commerce IBM	\rightarrow	TEST Export UBX Test Drive Destination IBM	1 of 1	\bigcirc	Complete 5 of 5 steps Audience share	8/3/2017 1:53:48 PM	8/3/2017 1:57:32 PM	:

At this point we are complete, We've integrated UBX and WCS and successfully export segments from WCS to UBX.

I hope this document helped you get to this same point.