



**BEA Campaign Manager for WebLogic
BEA WebLogic Commerce Server
BEA WebLogic Personalization Server**

Guide to Using the BEA E-Business Control Center

**BEA Campaign Manager for WebLogic 1.1
BEA WebLogic Commerce Server 3.5
BEA WebLogic Personalization Server 3.5
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Using the BEA E-Business Control Center

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About This Document

This documentation describes how you can use the BEA E-Business Control Center™ to create personalized Web sites for your valued e-business customers. The features of the E-Business Control Center that are available to you (as well as the corresponding help topics for these features) are determined at run time by the type of license you purchased. For details, please see “About the E-Business Control Center” on page 1-2.

This document includes the following topics:

- Chapter 1, “Introduction to the BEA E-Business Control Center,” introduces you to the capabilities of the E-Business Control Center and highlights some important points about its use. It provides information about the specific e-business roles and responsibilities this tool is intended to support, and indicates the recommended method for traversing rest of the documentation.
- Chapter 2, “Connecting the BEA E-Business Control Center to a Server,” provides step-by-step instructions on how you can establish new E-Business Control Center connections to a server, and how you can reuse existing connections.
- Chapter 3, “Building Conditions and Queries in the BEA E-Business Control Center,” is a central point of reference for information about building conditions and queries in the E-Business Control Center. The sections in this topic are not meant to be read in sequence, but rather, are pieces of information or instructions that you will use in the context of other tasks.
- Chapter 4, “Using Customer Segments to Target High-Value Markets,” contains basic information about customer segments as they are used in the E-Business Control Center, including a conceptual description, an explanation about how you might want to use customer segments, and step-by-step instructions for creating new customer segments.
- Chapter 5, “Retrieving Documents with Content Selectors,” describes how you can use content selectors to specify the conditions under which WebLogic

Personalization Server retrieves one or more documents from your content management system.

- Chapter 6, “Displaying Ads,” explains how you can use ad placeholders to display ads and to manage and evaluate the effectiveness of your advertising strategy.
- Chapter 7, “Events,” provides information about standard events and how to register custom events for use in the E-Business Control Center.
- Chapter 8, “Defining Stand-Alone or Campaign Discounts,” contains basic information about discounts as they are used in the E-Business Control Center. This information includes a conceptual description of a discount, an explanation about how you might want to use discounts, and step-by-step instructions for defining a new discount or modifying existing discounts within the E-Business Control Center.
- Chapter 9, “Discount Examples,” is a supplement to the previous chapter. It contains real-world examples in discounts, ranging from the simple to the complex.
- Chapter 10, “Roadmap for Creating Promotional Campaigns,” describes the high-level process or roadmap you should follow when creating a new promotional campaign in the E-Business Control Center.
- Chapter 11, “Creating and Managing Promotional Campaigns,” contains step-by-step information for defining a new campaign or modifying existing campaigns within the E-Business Control Center.

What You Need to Know

This help is intended for use by business analysts or marketing professionals who use the E-Business Control Center to personalize their e-business Web site, and for Commerce Business Engineers (CBEs) who provide the infrastructure to support the E-Business Control Center. For more information on each of these roles, see “Roles and Responsibilities” on page 1-8.

e-docs Web Site

BEA product documentation is available on the BEA corporate Web site. From the BEA Home page, click on Product Documentation or go directly to the “e-docs” Product Documentation page at <http://e-docs.beasys.com>.

Note: The contents of this document as provided on the “e-docs” Web site may be updated periodically with new information or corrections that may not yet be available in the corresponding online help system.

How to Print the Document

You can print a copy of this document from a Web browser, one file at a time, by using the File—>Print option on your Web browser.

A PDF version of this document is available on the E-Business Control Center documentation Home page on the e-docs Web site (and also on the documentation CD). You can open the PDF in Adobe Acrobat Reader and print the entire document (or a portion of it) in book format. To access the PDFs, open the E-Business Control Center documentation Home page, click the PDF files button and select the document you want to print.

If you do not have the Adobe Acrobat Reader, you can get it for free from the Adobe Web site at <http://www.adobe.com/>.

Related Information

For more information about the technical tasks involved in maintaining the E-Business Control Center infrastructure, see the *Developing Campaign Infrastructure* documentation at <http://edocs.bea.com/wlcs/docs35/campdev/index.htm>.

For information about how the E-Business Control Center works with a Web site to personalize the customer experience, see the following documentation:

- *Product Family Overview* at <http://edocs.bea.com/wlcs/docs35/intro/index.htm>.
- *Personalization Tour* at <http://edocs.bea.com/wlcs/docs35/p13ntour/index.htm>.
- *JSP Commerce and Campaign Tour* at <http://edocs.bea.com/wlcs/docs35/cstour/index.htm>.

Contact Us!

Your feedback on the BEA E-Business Control Center documentation is important to us. Send us e-mail at **docsupport@beasys.com** if you have questions or comments. Your comments will be reviewed directly by the BEA professionals who create and update the E-Business Control Center documentation.

In your e-mail message, please indicate that you are using the documentation for the BEA E-Business Control Center 1.1 release.

If you have any questions about this version of BEA E-Business Control Center, or if you have problems installing and running BEA E-Business Control Center, contact BEA Customer Support through BEA WebSUPPORT at **www.beasys.com**. You can also contact Customer Support by using the contact information provided on the Customer Support Card, which is included in the product package.

When contacting Customer Support, be prepared to provide the following information:

- Your name, e-mail address, phone number, and fax number
- Your company name and company address
- Your machine type and authorization codes
- The name and version of the product you are using
- A description of the problem and the content of pertinent error messages

Documentation Conventions

The following documentation conventions are used throughout this document.

Convention	Item
boldface text	Indicates terms defined in the glossary.
Ctrl+Tab	Indicates that you must press two or more keys simultaneously.
<i>italics</i>	Indicates emphasis or book titles.
monospace text	Indicates code samples, commands and their options, data structures and their members, data types, directories, and filenames and their extensions. Monospace text also indicates text that you must enter from the keyboard. <i>Examples:</i> <pre>#include <iostream.h> void main () the pointer psz chmod u+w * \tux\data\ap .doc tux.doc BITMAP float</pre>
monospace boldface text	Identifies significant words in code. <i>Example:</i> <pre>void commit ()</pre>
<i>monospace italic text</i>	Identifies variables in code. <i>Example:</i> <pre>String <i>expr</i></pre>
UPPERCASE TEXT	Indicates device names, environment variables, and logical operators. <i>Examples:</i> <pre>LPT1 SIGNON OR</pre>

Convention	Item
{ }	Indicates a set of choices in a syntax line. The braces themselves should never be typed.
[]	Indicates optional items in a syntax line. The brackets themselves should never be typed. <i>Example:</i> buildobjclient [-v] [-o name] [-f file-list]... [-l file-list]...
	Separates mutually exclusive choices in a syntax line. The symbol itself should never be typed.
...	Indicates one of the following in a command line: <ul style="list-style-type: none"> ■ That an argument can be repeated several times in a command line ■ That the statement omits additional optional arguments ■ That you can enter additional parameters, values, or other information The ellipsis itself should never be typed. <i>Example:</i> buildobjclient [-v] [-o name] [-f file-list]... [-l file-list]...
.	Indicates the omission of items from a code example or from a syntax line. The vertical ellipsis itself should never be typed.

1 Introduction to the BEA E-Business Control Center

The BEA E-Business Control Center is a tool designed to simplify the tasks that are necessary to create and maintain a truly personalized Web site. Building upon the functionality of the BEA WebLogic Commerce Server and the BEA WebLogic Personalization Server products that may already support your e-business, the E-Business Control Center can make business analysts and marketing professionals in your organization more self-sufficient, thereby minimizing the need for collaboration with busy technical resources. And even when collaboration is required for more specialized or advanced tasks, this collaboration may take significantly less time and be more efficient overall.

To meet this objective, the E-Business Control Center guides users through a variety of tasks, ensuring that both business and technical staff members can focus on the aspects of e-business management that are relevant to their role in the organization. The E-Business Control Center's intuitive graphical user interface empowers people in these diverse roles, allowing them to provide exceptional value to their online customers and to effectively nurture customer relationships.

This topic is intended to introduce you to the capabilities of the E-Business Control Center and highlight some important points about its use. It provides information about the specific e-business roles and responsibilities this tool is intended to support. After reading this topic, you will also learn the recommended method for traversing the documentation, which will guide you in the personalization of your Web site and possibly, in the creation of your own unique marketing promotions.

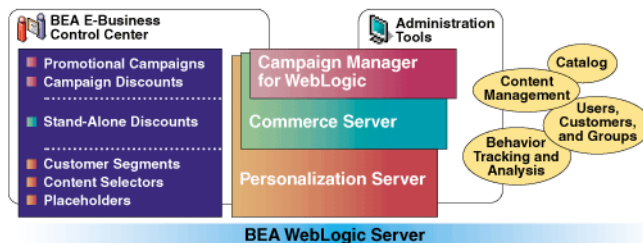
This topic includes the following sections:

- About the E-Business Control Center
- What Does the E-Business Control Center Provide?
- Roles and Responsibilities
- Important Notes
- Next Steps

About the E-Business Control Center

As shown in Figure 1-1, the E-Business Control Center is an e-marketing tool built upon the BEA products your organization's technical professionals know and trust to support their e-commerce Web development efforts. Whether your company utilizes just the WebLogic Personalization Server, takes advantage of the WebLogic Commerce Server, or licenses the BEA Campaign Manager for WebLogic, the E-Business Control Center can make growing and maintaining your online customer relationships easier and less time consuming.

Figure 1-1 E-Business Control Center



In the Personalization-only configuration, the E-Business Control Center exists in a simplified form, while still providing you with the utilities needed to display customized content. Use of the WebLogic Commerce Server product gives you access to even more features in the E-Business Control Center. If your organization licenses the Campaign Manager for WebLogic, you will have access to the most complete set of utilities for personalizing your customers' online experiences, including the ability to create promotional campaigns, in the E-Business Control Center. The information

provided in the following section will help you to understand what features are available in each version of the E-Business Control Center, and how these features can help you achieve your e-marketing goals.

Note: For more information about the WebLogic Personalization Server, the WebLogic Commerce Server, and the Campaign Manager for WebLogic product packaging, see the *Product Family Overview* documentation at <http://edocs.bea.com/wlcs/docs35/intro/index.htm>.

What Does the E-Business Control Center Provide?

No matter which version of the E-Business Control Center your organization uses, the E-Business Control Center's rich feature set is sure to provide you with the tools you need to effectively personalize your e-business. This section will help you understand which E-Business Control Center features are available in your version of the product, and describes some of the E-Business Control Center features that are available in all versions of the tool to help you get started.

WebLogic Personalization Server Customers

For WebLogic Personalization Server customers, the E-Business Control Center facilitates:

- **Keeping track of customer behavior (events).** Understanding your customers is the first step to providing them with a truly personalized Web experience. The E-Business Control Center makes use of behind-the-scenes behavior tracking functionality, allowing you to leverage customers' most frequent interactions with your e-business Web site when determining how to personalize site content. Customer behaviors, or events, that are tracked range from viewing content to clicking through hyperlinks. Your technical staff can also help you add your own custom events.

- **Analyzing customer interactions.** Tracking customer behaviors allows you to more effectively customize your e-marketing strategies and Web site presentation, but only if you have a way to analyze this information. To facilitate this analysis, the WebLogic Personalization Server comes with a popular third-party analytics package, providing you with a simple way to analyze data that corresponds to customer behaviors. Using this analytics package you can discover your customers' most specific needs.
- **Creating placeholders for content display.** Your analysis of customer interactions is likely to show that your customers have many different needs. To satisfy these needs, you may want to change certain content displayed on your Web site, and do so on a regular basis. In the past even a simple modification like changing an ad banner required the assistance of a Web developer, but not if you use the E-Business Control Center. Create placeholders using the E-Business Control Center to specify some information about the placeholders, provide this information to your technical staff, and then update the content displayed in the placeholders as often as you like, without any further technical assistance.
- **Defining customer segments.** Although an e-business audience may be diverse, there are often many similarities among customers that you can leverage to more effectively customize your Web site. The E-Business Control Center allows you to organize customers into groups, or customer segments, based on common characteristics. Customer segments may then be used to support your organization's strategic e-marketing goals.
- **Targeting customers with personalized content.** Even after you have collected some information about your customers, analyzed the data, created placeholders in your Web pages, and organized customers into segments, you may decide that frequent updates to your Web site content based on these factors is just not enough. In these cases, you may decide to collaborate with your technical staff who can help you set up and utilize the content selectors available in the E-Business Control Center. Content selectors allow you and your Web developers to match content with customers, based on the characteristics they have in common. Once the content selectors are established, your Web site will automatically target customers with personalized content, without requiring any further intervention.

WebLogic Commerce Server Customers

For WebLogic Commerce Server customers, the E-Business Control Center provides all the features previously described, plus:

- **Defining stand-alone discounts.** As part of a marketing effort, you might want to temporarily give all your customers a discount on particular items in your product catalog. Using the E-Business Control Center, you can define stand-alone discounts by specifying the percentage or dollar amount off, whether the discount applies on a per-item, set-based, or per-order basis, the products to which the discount applies, and so on. If a customer purchases multiple items and is likely to qualify for more than one discount, the priority you associate with each discount can help resolve any conflicts and ensure that customers receive the discount(s) you intend.

Campaign Manager for WebLogic Customers

For Campaign Manager for WebLogic customers, the E-Business Control Center builds upon all the previously described features, and adds capabilities for:

- **Defining campaign discounts.** Campaign discounts are similar to stand-alone discounts with one exception: They are specifically designed for use within promotional campaigns. In other words, campaign discounts are discounts that are not offered to all your e-business customers, but only those who belong to a particular customer segment, who exhibit particular browsing behaviors, or meet other predefined criteria. With the E-Business Control Center, you can define campaign discounts and apply them in various ways to meet your targeted marketing objectives.
- **Executing and managing promotional campaigns.** Using predefined customer segments, tracked customer behaviors, and previously established campaign discounts, you can create, execute, and maintain powerful promotional campaigns with the E-Business Control Center. Display an ad in a highly visible placeholder on your home page to customers who show interest in new products, or send a promotional e-mail with a special discount to entice browsing visitors to buy. You can execute these actions based on the segment to which a customer belongs, based on the customer's behavior on your Web site, or on a number of other conditions. Alternatively, there may be times when you want to select customers at random to pilot test a new marketing strategy. With the E-Business

Control Center, you can combine these campaign-specific features to meet all your promotional needs.

- **Monitoring and reporting of campaign results.** While your promotions are in action, utilize the same third-party tools that analyze your customers' behavior to monitor and qualify promotional campaign results. After your campaign has ended, produce reports that allow you to share the success of your e-marketing strategies with other interested parties in your organization.

Features of the E-Business Control Center That Will Help You Get Started

In addition to the features described in the previous sections of this document, all versions of the E-Business Control Center provide features that will make learning easy and help you get started quickly.

BEA E-Marketing Fieldbooks

The goal of the BEA E-Marketing Fieldbooks is to help you architect a strategy for e-marketing success. These documents weave together a breadth of fundamental e-marketing best practices with practical recommendations for how to implement your BEA customer management platform and other technologies to achieve maximum value from your customer relationships.

The Fieldbooks contain content ranging from Marketing 101 concepts to leading-edge, technology driven marketing strategies. By covering a range of topics, the Fieldbooks address the diverse needs of organizations with varied levels of marketing sophistication, while also conveying the importance of building e-marketing success through a solid foundation of marketing basics.

Fieldbook topics center around traditional functional marketing roles to enable individual contributors within your organization to quickly find the content that applies to their responsibilities. Although written for marketers and business managers, the Fieldbooks still cover an array of technical issues, focusing on utilization of technology to drive business objectives.

For a pointer to the location of the E-Marketing Fieldbooks, please see the product *Release Notes* at <http://edocs.bea.com/wlcs/docs35/relnotes/index.htm>.

Sample Applications and Product Tours

Out-of-the-box, the E-Business Control Center interacts with the sample applications that come packaged with your BEA product. If you have the WebLogic Personalization Server, the E-Business Control Center will work with the ACME Portal sample application. The WebLogic Commerce Server version of the E-Business Control Center will work with the sample storefront application (Commerce Server templates) as well. The Campaign Manager for WebLogic product will extend the WebLogic Commerce Server product's sample application to show promotional campaigns in action.

To help you understand the interactions taking place between the E-Business Control Center tool and your Web site, the documentation also contains two tours that walk you through the features highlighted in the sample applications:

- The *Personalization Tour* walks you through the steps required to use many of the personalization services provided by the WebLogic Personalization Server. It uses the example portal that ships with the product to show how the Personalization Administration tools can be used to set up user profiles and groups, change properties, and load content into a Web page. It also illustrates how a personalized portal is created and deployed, with different views for different users.
- The *JSP Commerce and Campaign Tour* leads you through many of the Web pages provided as part of the sample storefront application, demonstrating how these templates work and illustrating the scope of campaign-related features that are available.

For more information about these product tours, see the “e-docs” product documentation Web page at <http://edocs.bea.com/wlcs/docs35/index.html>.

Online Help

At any time, you can access the E-Business Control Center's built-in online help system to select from a list of available topics or to search for a particular topic. The help system contains both step-by-step directions and specific recommendations about how to maximize the E-Business Control Center's capabilities for your e-marketing efforts.

Note: The contents of this help system are also provided on the “e-docs” Web site (at <http://edocs.bea.com>) in both HTML and PDF formats, and may be updated with new information or corrections as necessary.

Roles and Responsibilities

The E-Business Control Center was designed specifically to help business analysts, marketing professionals, and other non-technical professionals implement customized e-marketing strategies that will capture and maintain sizable online audiences. Because a business analyst's strength is in conceiving effective models for e-business, the tools you use should allow you to execute these strategies easily, without worrying about technical details or becoming overly dependent on technical resources.

The E-Business Control Center does not require you to have intricate knowledge about how a Web site is implemented. Rather, the E-Business Control Center allows you to remain in control of all your e-marketing efforts, including the creation and modification of promotional campaigns, through an intuitive graphical interface.

Although a business analyst's reliance on technical resources is greatly reduced when using the E-Business Control Center, some degree of collaboration with your organization's technical staff may still be necessary to fully personalize your customers' experience. The E-Business Control Center provides many out-of-the-box components that you can use to meet your business objectives. However, you may develop a new e-marketing strategy that leverages the power of BEA technology but does not surface in the E-Business Control Center tool. It is during these times that you may need to work with a technical resource in your organization to establish a supporting infrastructure. Once this is done, however, you can reuse the new components like you would any other in the E-Business Control Center.

The technical resource business analysts will most likely collaborate with is the Commerce Business Engineer (CBE). The CBE is a person in an organization who is half business analyst and half software system engineer. The CBE may:

- Manage the operations of major pieces of the Web site, or the entire site itself.
- Coordinate major and minor change processes.
- Be an active participant in overall business effectiveness monitoring and system performance monitoring.
- Be responsible for major, structural updates to an e-business Web site, for management of user profiles, user permissions, and so on.
- Perform many behind-the-scenes programming tasks that keep a Web site functioning.

Therefore, when you require additional support for the E-Business Control Center, you would typically contact a person (or a group of people) who fill the CBE role described above.

Note: For more detailed information about how a CBE accomplishes campaign-related programming tasks, see the *Developing Campaign Infrastructure* documentation at <http://edocs.bea.com/wlcs/docs35/campdev/index.htm>.

Important Notes

Before you begin using the E-Business Control Center, there are a few important pieces of information you should understand. This information includes:

- Connecting to the Appropriate Server
- Establishing Organizational Policies

Note: Taking the time to carefully read through this section could prevent you from making mistakes that negatively affect your Web presence, possibly saving you time, effort, and money in the long run.

Connecting to the Appropriate Server

Since the E-Business Control Center allows you to directly modify your Web site, the E-Business Control Center must be connected to a server. A dialog box in the E-Business Control Center will allow you to specify information about the server to which you want to connect. You can obtain this information from your organization's CBE or other technical resource.

Once you have connected to a server and save your changes in the E-Business Control Center, your changes will affect the Web site running on this machine. Therefore, BEA recommends that you make all changes on a development or staging server, so you can be sure your modifications work as expected before affecting your customers' online experience. Once you are satisfied with your changes, you can call upon a CBE

or other technical resource to move your changes onto a production or live server, according to your organization's established site deployment policies. Be sure to contact your CBE about these issues before using the E-Business Control Center.

For instructions on connecting the E-Business Control Center to a server, see Chapter 2, "Connecting the BEA E-Business Control Center to a Server."

Establishing Organizational Policies

Currently, multiple users may connect to the same server and begin manipulating information in the E-Business Control Center. If multiple users are working in the same area at the same time, or if one user is modifying information that another user depends upon, there is a chance that important information may be overwritten or that a particular user's intended outcome is not realized.

Therefore, it is extremely important that your organization develop some policies about who *owns* objects in the E-Business Control Center. As used in this discussion, the term object can refer to customer segments, placeholders, events, campaigns, and so on. Ownership of objects is critical when it comes to modifying information that may be in broad use. For example, if a customer segment is created by one user, it is very possible that other users may begin to use the segment (perhaps unbeknownst to the original author). If the author later changes the segment definition, many people are going to be affected. So, it is also highly recommended that your organizational policies identify which objects others can use, which are more proprietary or "use at your own risk," and so on.

Next Steps

This section provides you with information about the next steps you should take regarding documentation review, and explains how to prepare the E-Business Control Center for use.

Recommended Reading

After you have reviewed this introduction, you can take a number of paths through the documentation, depending upon your goals. If you have the Personalization-only version of the E-Business Control Center, you should review at least the conceptual explanations in the following topics:

- Chapter 4, “Using Customer Segments to Target High-Value Markets.”
- Chapter 5, “Retrieving Documents with Content Selectors.”
- Chapter 6, “Displaying Ads.”
- Chapter 7, “Events.”

If you have the version of the E-Business Control Center that comes with the WebLogic Commerce Server product, you should also review conceptual explanations in Chapter 8, “Defining Stand-Alone or Campaign Discounts.”

Then, you can proceed to utilize the E-Business Control Center, following the step-by-step instructions provided in later sections of these topics.

If you have the version of the E-Business Control Center that comes with the Campaign Manager for WebLogic, it is very important that you also review Chapter 10, “Roadmap for Creating Promotional Campaigns,” before getting started. This topic should contain all the information you need to know before moving on to the step-by-step instructions that will guide you through campaign implementation.

Note: The importance of planning can never be overstated, so resist skipping the Roadmap discussion! Carefully thinking about and designing a detailed marketing strategy ensures that you have (at the very minimum) the information you will need to begin implementing your campaigns in the E-Business Control Center. In addition, up-front planning can help you identify areas where your strategy may be unclear, possibly preventing you from running into problems down the road that require both time and effort to resolve. Naturally, such problems can delay the release of a promotional campaign, thus affecting your ability to provide the valuable services your online customers expect.

Preparing the E-Business Control Center for Use

If you feel comfortable with the materials previously described, you are almost ready to use the E-Business Control Center. All you need to do now is follow these two steps:

1. If you are viewing this documentation in the online help system, just skip to step 2.

If you are viewing this documentation on the BEA “e-docs” documentation Web site, from a product CD-ROM, or local installation, you must first start the E-Business Control Center:

Windows: Selecting Start → Programs → BEA WebLogic E-Business Platform → BEA Campaign Manager → BEA E-Business Control Center.

Solaris 8: Run `$ <BEA_HOME>/E-BusinessControlCenter/bin/ebcc.sh`

2. Connect the E-Business Control Center to a server, following the instructions provided in Chapter 2, “Connecting the BEA E-Business Control Center to a Server.”

Note: The Solaris 8 (UNIX) version of the E-Business Control Center is not included on the product CD. You must download it from the BEA Download site to install it. See Installing the E-Business Control Center in the *Installation Guide* for more information.

2 Connecting the BEA E-Business Control Center to a Server

After starting the BEA E-Business Control Center, the first thing you need to do is connect to a server. While you must connect the E-Business Control Center to a server each time you use it, establishing new connections is simple and you can reuse connections after you create them.

This topic includes the following sections:

- Gathering Connection Information
- Opening the Server Connection Window
- Establishing a New Connection
- Using Existing Connections

Gathering Connection Information

Before you can connect to a server, you will need to obtain the following information from your organization's Commerce Business Engineer (CBE) or other technical resource:

- **Hostname** – The name or IP address of the server machine (for example, “webstage” or 148.185.27.35).
- **Port** – The port on the machine that will accept your connection (for example, 7501).
- **Username** – The username you will use to log into the server.
- **Password** – The password you will use to log into the server.

Warning: The server you connect to should ideally be a development or staging server, since the changes you make in the E-Business Control Center will affect the Web site running on this machine. Be sure you connect to a machine that is approved by your organization's technical staff.

Once you have gathered this information, you are ready to establish a connection using the Server Connection window.

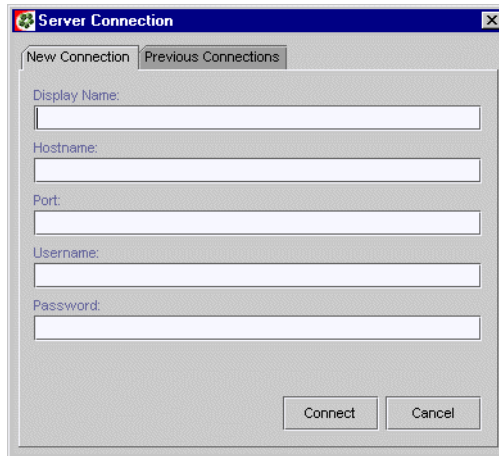
Opening the Server Connection Window

When you start the E-Business Control Center, the Server Connection window automatically appears. If at any time you need to reopen the Server Connection window, simply select Connect from the BEA E-Business Control Center File menu.

Tip: You can also click the Connect To Server icon () shown on the Explorer toolbar to open the Server Connection window.

If you have never established a connection to a server before, the Server Connection window opens with the New Connection tab selected, as shown in Figure 2-1.

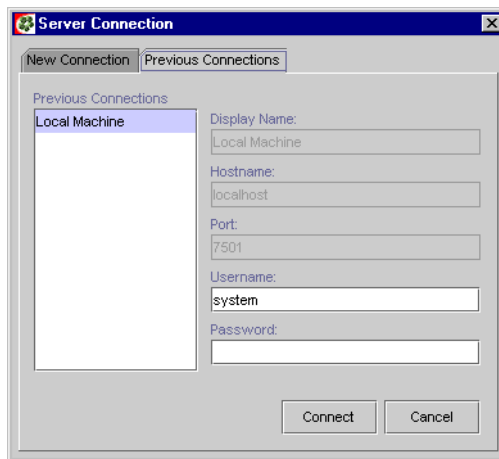
Figure 2-1 Server Connection Window, New Connection Tab



Note: If the New Connection tab is not selected, click the New Connection tab to select it.

If you have previously established connections to one or more servers, the Server Connection window opens with the Previous Connections tab selected, as shown in Figure 2-2.

Figure 2-2 Server Connection Window, Previous Connections Tab



Note: If the Previous Connections tab is not selected, click the Previous Connection tab to select it.

Establishing a New Connection

To establish a new connection to a server, be sure the Server Connection window is open and that the New Connection tab is selected. Then, follow these steps:

1. If desired, enter a name for the connection in the Display Name field. The display name is used when re-establishing connections to the same server, so be sure to choose a meaningful name.

Note: The Display Name field is not required; it is for convenience purposes only. If you do not specify a name, the URL will be used.

2. Enter the hostname, port, username, and password given to you by your Commerce Business Engineer (CBE) in each of the appropriate fields.
3. Click Connect to connect to the server. A connection message appears above the Explorer window, indicating that the E-Business Control Center is attempting to connect to the server you specified.

Notes: If the connection is successful, the Connected To: message shown above the Explorer window changes from None to the name you specified in the Display Name field. The next time the Server Connection window appears, the Previous Connections tab will already be selected for you.

If you receive an error while trying to establish a connection, double check your connection information. If you entered this information correctly, contact your CBE to make sure the server is running. If the problem persists, work with your CBE to identify the nature of the problem.

Using Existing Connections

If you have already established a connection to a server, you can use the display name you previously provided to quickly reconnect to that same machine. To re-establish a connection to a server, be sure the Server Connection window is open and that the Previous Connections tab is selected. Then, follow these steps:

1. Click a connection name shown in the Previous Connections list to select it. The Display Name, Hostname, Port, and Username fields are populated with information corresponding to the connection you selected.
2. Enter the password in the Password field.
3. Click Connect to re-establish the connection to the server.

Notes: If the connection is successful, the Connected To: message shown above the Explorer window changes from None to the Display Name.

If you change your mind about re-establishing the connection, click Cancel to close the Server Connection window or click the New Connection tab to establish a new connection.

If you receive an error while trying to establish a connection, double check your connection information. If you entered this information correctly, contact your Commerce Business Engineer (CBE) to make sure the server is running. If the problem persists, work with your CBE to identify the nature of the problem.

2 *Connecting the BEA E-Business Control Center to a Server*

3 Building Conditions and Queries in the BEA E-Business Control Center

This topic is a central point of reference for information about building conditions and queries in the BEA E-Business Control Center. The sections in this topic are not meant to be read in sequence, but rather, are pieces of information or instructions that you will use in the context of other tasks. These tasks may be used when defining customer segments, running a query for content selectors, or adding scenarios to your promotional campaigns. (*Queries* search your content management system for documents based on a set of criteria that you specify.)

This topic includes the following sections:

- Listing of the Available Conditions
- Using the Select Customer Segments Window
- Using the Properties and Property Values Windows
- Using the Select Events Window
- Using the Date/Time Entry Dialog Boxes
- Using the Quantity Selector or Currency Selector Dialog Boxes
- Using the Select Operator Dialog Box

- Using the Enter SKU Numbers or Enter Categories Windows
- Using the Enter a Range Dialog Box
- Constructing Queries

Listing of the Available Conditions

The E-Business Control Center provides you with a number of conditions you can use to customize your e-marketing efforts. Depending on what you are trying to accomplish in the E-Business Control Center, you may encounter some or all of the conditions described in Table 3-1.

Table 3-1 Descriptions of Conditions

Condition	Description
The visitor is a member of a predefined customer segment	If the visitor to your Web site belongs to a predefined customer segment, execute the specified action. For example, if the customer is a Gold Customer (customer segment), give the customer a 15% discount (action).
The visitor has specific characteristics	If a visitor's characteristics are compared to values you specify and those comparisons evaluate to true, execute a specified action. For example, if the customer's salary (characteristic) is greater than or equal to (comparison) \$50,000 (value), send the customer an e-mail (action).
The HTTP session has specific properties	If the HTTP session's properties are compared to values you specify and those comparisons evaluate to true, execute a specified action. An HTTP session is information your organization may want to track about a visitor's browsing session on the Web site. There are no properties for the HTTP session in the E-Business Control Center out-of-the-box.
An HTTP request has specific properties	If the HTTP request's properties are compared to values you specify and those comparisons evaluate to true, execute a specified action. There <i>are</i> properties for the HTTP request in the E-Business Control Center out-of-the-box.
An event has occurred	If a specified event occurs, execute the specified action. For example, if the customer has logged in (event), display an ad that matches their interests (action). Events may be selected from a number of predefined event types.

Table 3-1 Descriptions of Conditions (Continued)

Condition	Description
An event has specific characteristics	If the event's characteristics are compared to values you specify and those comparisons evaluate to true, execute a specified action. For example, if a customer adds more than 5 items to their shopping cart (event), give the customer a 10% discount (action).
The date is	If the current date is equal to the one you specify, execute a specified action. For example, if the date is equal to July 22, 2001, send customers an e-mail about an upcoming sale (action). The <i>current</i> date refers to the date at the point that the condition is evaluated for a given user visiting the Web site.
It is after a given date	If the current date is after a date you specify, execute a specified action. For example, if the date is after December 18, 2000, offer customers a discount (action). The <i>current</i> date refers to the date at the point that the condition is evaluated for a given user visiting the Web site.
It is after a given date and time	If the current date and time is after a date and time you specify, execute a specified action. For example, if the date and time is after July 22, 2001 at 3 p.m., send customers an e-mail about an upcoming sale (action). The <i>current</i> date and time refers to the date and time at the point that the condition is evaluated for a given user visiting the Web site.
It is between two times	If the current time falls within a range of times you specify, execute a specified action. For example, if the time is between 3 p.m. and 5 p.m., offer customers a discount (action). The <i>current</i> time refers to the time at the point that the condition is evaluated for a given user visiting the Web site.
It is between two dates	If the current date falls within a range of dates you specify, execute the specified action. For example, if the date is between December 18, 2000 and December 18, 2001, show customers a sale ad (action). The <i>current</i> date refers to the date at the point that the condition is evaluated for a given user visiting the Web site.
It is between two dates/times	If the current date and time falls within a range of dates and times you specify, execute the specified action. For example, if the date and time is between July 22, 2000 at 3 p.m. and July 22, 2001 at 3 p.m., show customers a sale ad (action). The range of dates is inclusive. The <i>current</i> date and time refers to the date and time at the point that the condition is evaluated for a given user visiting the Web site.
There is a specific item in the shopping cart	If an item you specify exists in the customer's shopping cart, execute the specified action. For example, if the customer has an item with a SKU equal to T144 in their shopping cart, give the customer a 10% discount (action).

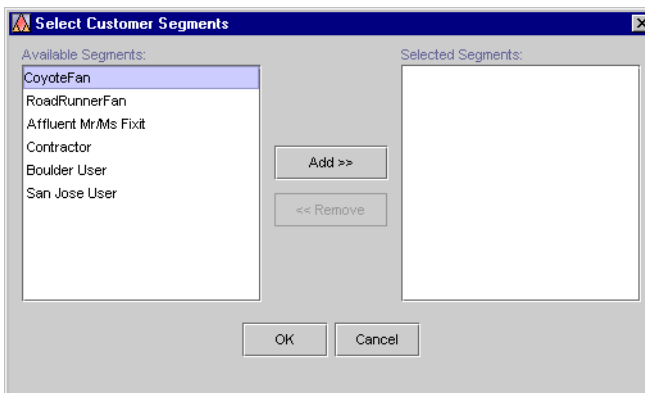
Table 3-1 Descriptions of Conditions (Continued)

Condition	Description
There is an item from a given category in the shopping cart	If an item from a product category you specify exists in the customer's shopping cart, execute the specified action. For example, if the customer has an item from Books (product category) in their shopping cart, give the customer a 10% discount (action).
The value of items in the shopping cart is a certain amount	If the value of the items in a customer's shopping cart meets the criteria you specify, execute the specified action. For example, if the customer has \$100 worth (value) of items in their shopping cart, send them a Thank You e-mail (action).
A random number falls within a given range	If a random number associated with a visitor falls between 1 and a value you specify (up to 100), execute this action. For example, if you specify a number between 1 and 50, the action will be executed for approximately 50% of the visitor population.

Using the Select Customer Segments Window

When you click the [customer segment] hyperlink, the Select Customer Segments window opens. Figure 3-1 shows the Select Customer Segments window.

Figure 3-1 Select Customer Segments Window



1. Click a customer segment name shown in the Available Segments list to select it. The customer segment is highlighted.
2. Click Add. The customer segment moves to the Selected Segments list.
3. Repeat steps 1 and 2 for each customer segment you want to add.
Note: If you make a mistake, click a customer segment name shown in the Selected Segments list to select it, then click Remove.
4. Click OK. The Select Customer Segments window closes, and the [customer segment] hyperlink changes to reflect the customer segment(s) you specified.

Using the Properties and Property Values Windows

Many items in the E-Business Control Center can be described by their characteristics or **properties**. For example, visitors to the site, content to be shown to visitors, and events that represent visitor behavior can all be described in terms of their properties. Related properties are grouped together for convenience into **property sets**. Objects in the E-Business Control Center may have one or more property sets associated with

3 *Building Conditions and Queries in the BEA E-Business Control Center*

them. For example, visitors may have one set of properties pertaining to general information, such as their address, and another set of properties pertaining to demographic information, such as their gender.

The windows where you describe E-Business Control Center objects by way of their properties are generically referred to as Properties windows. Using the Properties windows, and their associated Property Values windows, you can build Descriptors that describe an object of interest. The **Descriptor** is comprised of a **property phrase** and a **value phrase**.

For example, you may be interested in targeting an e-mail to customers whose income range is \$75,000-\$99,000. The Descriptor created in an E-Business Control Center Properties window would be:

```
Demographics: Income_Range is equal to "$75,000-$99,000."
```

Demographics is the property set in which you would find the Income_Range property, Is Equal is the comparison, and "\$75,000=\$99,000" is the value. Together, the property set and property form the following Property Phrase:

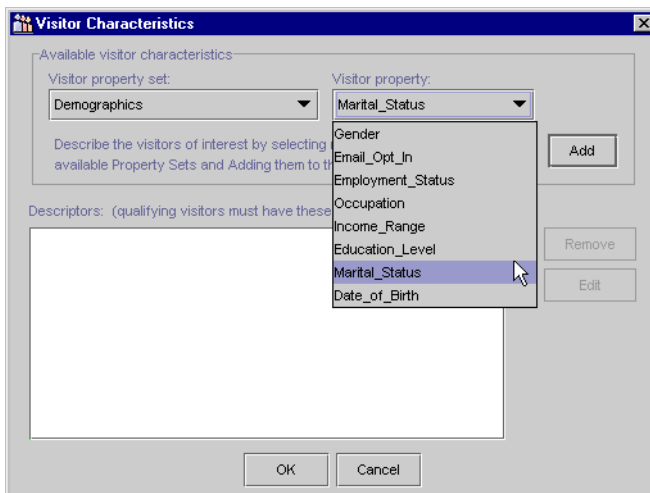
```
Demographics: Income_Range
```

Together, the comparison and the value form the following Value Phrase:

```
is equal to "$75,000-$99,000."
```

When you click the [characteristics] or [properties] hyperlinks, a Properties window opens. Figure 3-2 is an example of a Properties window.

Figure 3-2 Properties Window

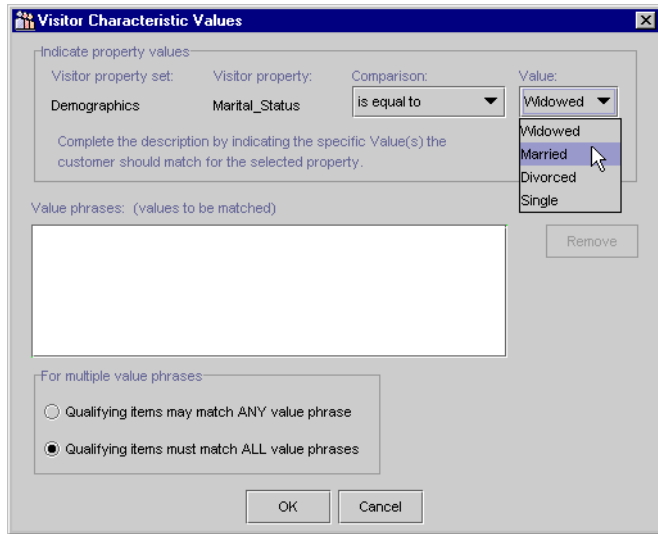


1. Select a property set from the Property Set drop-down list, and a property from the Property drop-down list.

Note: The E-Business Control Center includes some values for the Property Set and Property lists. However, additional Property Sets and Properties may be defined by your organization's Commerce Business Engineer (CBE) or other technical resource.

2. Click Add. A Property-Values window opens, as shown in Figure 3-3.

Figure 3-3 Property-Values Window

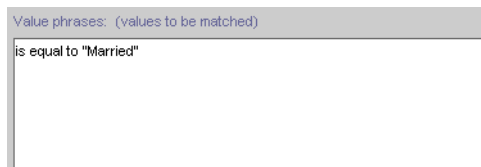


3. Select a comparison from the Comparison drop-down list, and a value from the Value drop-down list.

Warning: It may be possible to construct value phrases that are not reasonable in real world situations. Be sure to select a comparison and value that makes sense for the property set and property you previously selected.

4. Click Add. The value phrase you specified appears in the Value Phrases list box, as shown in Figure 3-4.

Figure 3-4 Value Phrases List Box

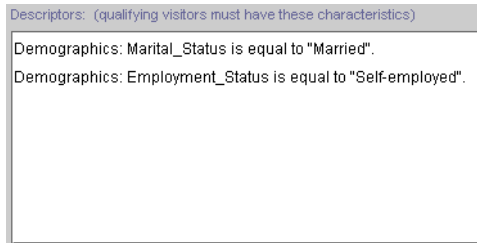


5. If desired, add more value phrases by repeating steps 3 and 4. If you add multiple value phrases, select a Multiple Value Phrases option to specify whether you want to match any or all of the value phrases you specify. If you only specify one value phrase, you can skip the Multiple Value Phrases option.

Note: If you need to remove a value phrases, click on the value phrases in the Value Phrases list box to select it, then click Remove.

6. Click OK. The Property-Value window closes, and the descriptor(s) appear in the Descriptors list box of the Properties window, as shown in Figure 3-5.

Figure 3-5 Descriptors List Box

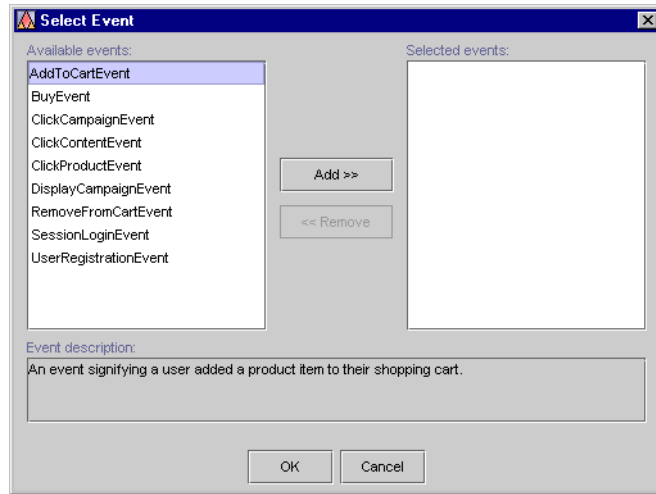


7. If desired, repeat steps 2 through 6 to specify multiple descriptors.
8. Click OK. The Properties window closes, and the [characteristics] and/or [properties] hyperlinks change to reflect the descriptors you specified.

Using the Select Events Window

When you click the [event name] hyperlink, the Select Events window opens. Figure 3-6 shows the Select Events window.

Figure 3-6 Select Events Window



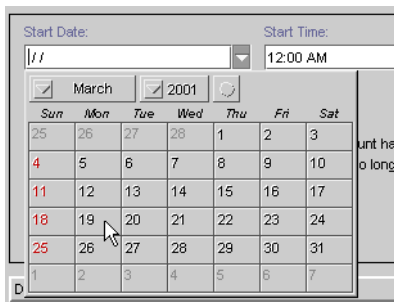
1. Click an event name shown in the Available Events list to select it. A description of the event is shown in the Event Description text area.
2. Click Add. The event moves to the Selected Events list.
3. Repeat steps 1 and 2 for each event you want to add.
Note: If you make a mistake, click an event name shown in the Selected Events list to select it, then click Remove.
4. Click OK. The Select Events window closes, and the [event name] hyperlink changes to reflect the event(s) you specified.

Using the Date/Time Entry Dialog Boxes

When you click one of the generic date or time related hyperlinks, one of the date/time entry dialog boxes opens. Simply type in the date and/or time in the appropriate field, then click OK. When you do so, the date/time entry dialog box closes, and the generic hyperlinks change to reflect the dates and/or times you specified.

Tip: For dates, you can either type in the date, or click the drop-down calendar to select the date, as shown in Figure 3-7. Just click a date to select it.

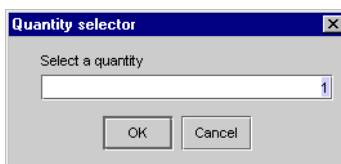
Figure 3-7 Date Calendar



Using the Quantity Selector or Currency Selector Dialog Boxes

When you click the [n] hyperlink, a Quantity Selector dialog box opens. When you click the [monetary amount] hyperlink, a similar dialog box, called Currency Selector opens. Figure 3-8 shows the Quantity Selector dialog box.

Figure 3-8 Quantity Selector Dialog Box



Note: A default value may be shown in the field.

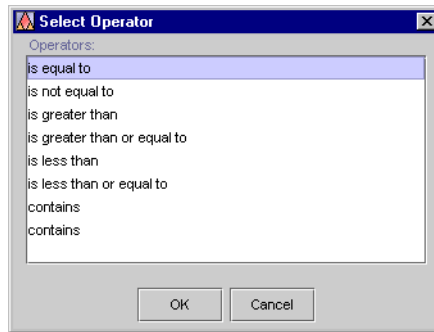
1. If desired, type a new value into the field.

2. Click OK. The Quantity Selector or Currency Selector dialog box closes, and the [n] or [monetary amount] hyperlinks change to reflect the value you specified.

Using the Select Operator Dialog Box

When you click the Equal To hyperlink, a Select Operator dialog box opens. Figure 3-9 shows the Select Operator dialog box.

Figure 3-9 Select Operator Dialog Box



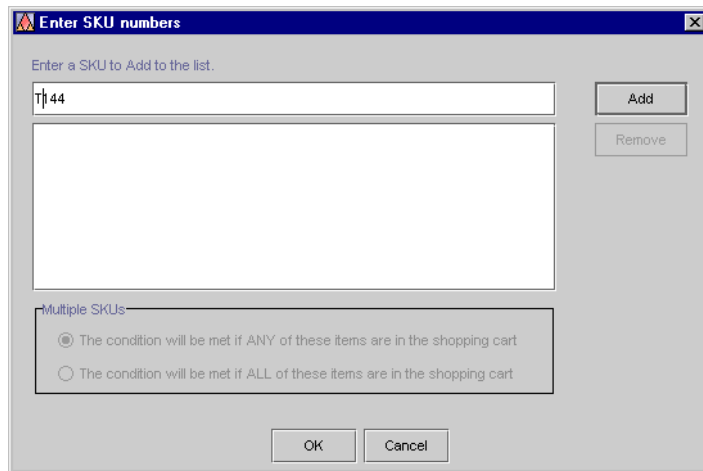
Note: A default value of Is Equal To is highlighted, which is why the hyperlinked Equal To text you clicked on to open the dialog box was not enclosed in brackets.

1. If desired, click a new value in the Operators list to select it.
2. Click OK. The Select Operator dialog box closes, and the hyperlink changes to reflect the value you specified.

Using the Enter SKU Numbers or Enter Categories Windows

When you click the [sku] hyperlink, an Enter SKU Numbers window opens. When you click the [product category] hyperlink, a similar window, called Enter Categories opens. Figure 3-10 shows the Enter SKU Numbers window.

Figure 3-10 Enter SKU Numbers Window



1. Enter a SKU number or product category into the field.
Note: Be sure you obtain the exact SKU number or product category from those who maintain your product catalog and that you enter them correctly.
2. Click Add. The SKU number or product category you entered appears in the list.
Note: If you make a mistake, click the SKU number or product category in the list to select it, then click Remove.
3. If desired, repeat step 2 to add multiple SKU numbers or multiple product categories.

4. If you add multiple SKUs or product categories, select a Multiple SKUs or Multiple Categories option. That is, specify whether the condition is met if Any or All of the SKU numbers (or product categories) exist in the customer's shopping cart.

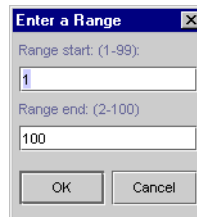
So, for example, if you specified SKU number T144 and SKU number D128 and you selected the Any option, customers with *either* of these SKU numbers in their shopping cart would meet the conditions. If you selected the All option, customers with *both* of these SKU numbers in their shopping cart would meet the conditions.

5. Click OK. The Enter SKU Number or Enter Categories window closes, and the [sku] or [product category] hyperlinks change to reflect the value(s) you specified.

Using the Enter a Range Dialog Box

When you click the [x] or [y] hyperlinks, the Enter a Range dialog box (shown in Figure 3-11) opens.

Figure 3-11 Enter a Range Dialog Box



1. Enter a value for the range start. You can enter a value between 1 and 99.
2. Enter a value for the range end. You can enter a value between 2 and 100.
3. Click OK. The Enter a Range dialog box closes, and the [x] and [y] hyperlinks change to reflect the start and end values you specified.

Constructing Queries

To create ad placeholders, scenario actions, and content selectors that find and display documents, you must construct queries. Queries search your content management system for documents that you describe. You can describe documents in the following ways:

- By comparing a document property to a value or range of values.

For example, you want to display ads for ACME mutual funds in an ad placeholder. Your content management system uses a property named `productName` to indicate the name of the mutual fund that a document advertises. You construct a query that finds all documents for which the `productName` property contains `ACME`.

- By comparing a document property with a property of some other object. (This type of descriptor is available only for queries that content selectors and scenario actions run.)

For example, you want a content selector to display documents that describe investing in mutual funds. Your content management system uses a document property called `investorRiskLevel` to identify whether a document describes an investment that is aggressive, moderate, or conservative. Your customer profiles also include a property called `investorRiskLevel` to indicate whether a customer prefers aggressive, moderate, or conservative investments. You construct a query that finds all documents for which the `investorRiskLevel` property contains a value that is equal to the value of a customer's `investorRiskLevel` property.

For content selectors and scenario actions, you can also combine the two types of descriptors in a single query. For example, you can create a query for a content selector that finds documents that advertise ACME mutual funds and that match a customer's investment-risk profile.

To construct queries, do the following:

1. Select a Document Property.
2. Do one or more of the following:
 - Describe Documents by Comparing the Property to a Value or Range of Values

- Describe Documents by Comparing the Property with the Properties of Other Objects
3. Specify How to Handle Multiple Value Phrases and Descriptors.
 4. Preview the Query Results.

You can search for multiple document properties by repeating steps 1 through 3.

Select a Document Property

You select document properties in the Ad Search window or the Content Search window, depending on whether you are creating an ad placeholder, scenario action, or content selector. The E-Business Control Center displays the Ad/Content Search window when you do any of the following:

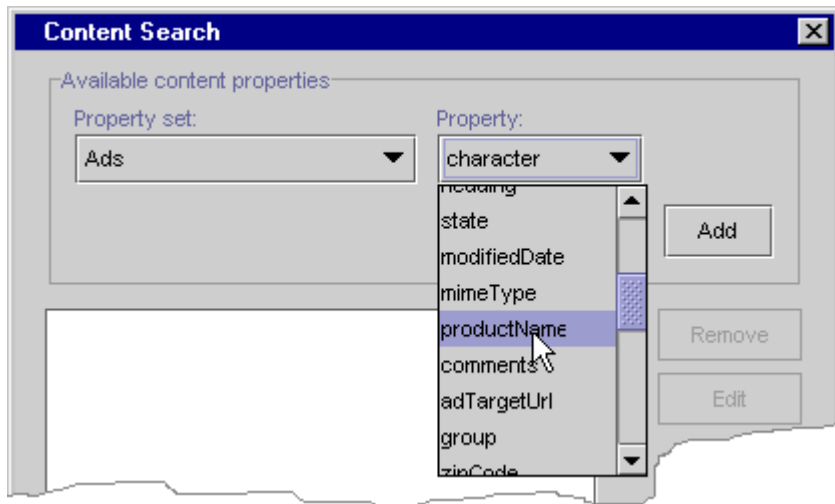
- Click **New** in the Placeholder Editor
- Click the hypertext link in “Show the results of this [empty ad search]...” under **Action** in the New Ad Action Editor. The New Ad Action Editor displays as part of creating a campaign scenario, and is available only with BEA Campaign Manager for WebLogic Server.
- Click the hypertext link in “Show the results of this [empty content search]” under **Action** in the Content Selector window.

In the Ad/Content Search window, do the following:

1. From the Property Set list, select the property set that contains the properties you use to describe documents.
2. From the Property list, select a document property. (See Figure 3-12.)

For example, you are constructing a query for an ad placeholder. Your content management system uses a property named `productName` to indicate the name of the product that a document advertises. To search for an ad based on the name of the product it advertises, click `productName` from the Property list.

Figure 3-12 Select a Property for an Ad Placeholder



3. Click Add to open the Ad/Content Search Values window.
4. Do one or more of the following:
 - Describe Documents by Comparing the Property to a Value or Range of Values
 - Describe Documents by Comparing the Property with the Properties of Other Objects (This type of comparison is available only for queries that content selectors and scenario actions run.)

Describe Documents by Comparing the Property to a Value or Range of Values

To find documents by comparing the document property with a value or range of values, do the following:

1. From the Ad/Content Search Values window, do one of the following:
 - If you are constructing a query for a content selector or a scenario action, click the Values tab. (See Figure 3-13.)

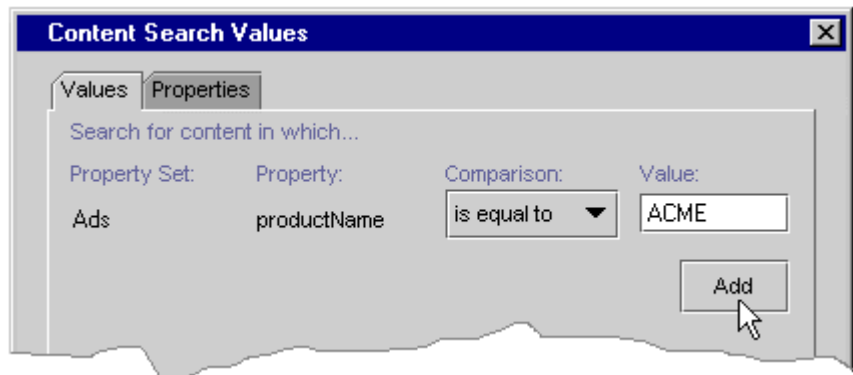
3 Building Conditions and Queries in the BEA E-Business Control Center

- If you are constructing a query for an ad placeholder, the Ad Search Values window does not contain tabs. Skip this step and go to step 2.
2. From the Comparison list, choose a comparator.
 3. In the Value box, select or enter a value. (Depending on the property that you are comparing, the Value box might contain a list of values for you to select.)

For example, to find documents in your content management system that advertise ACME products, select Is Equal To from the Comparison list. Then enter ACME in the Value list.

4. Click Add.
5. Do one of the following:
 - To compare the document property with additional values, repeat steps 2 through 4.
 - If you are constructing a query for a content selector or a scenario action and you want to compare the document property with the properties of other objects, go to “Describe Documents by Comparing the Property with the Properties of Other Objects” on page 3-19.
 - To select another document property, click OK and go to “Select a Document Property” on page 3-16.
 - To complete the query construction, go to “Specify How to Handle Multiple Value Phrases and Descriptors” on page 3-20.

Figure 3-13 The Values Tab for Content-Selector Queries



Describe Documents by Comparing the Property with the Properties of Other Objects

If you are constructing a query for a scenario action or a content selector, you can find documents by comparing the document property with the properties of other objects. To construct such a query, do the following:

1. From the Ad/Content Search Values window, click the Properties tab.
2. From the Comparison list, choose a comparator.
3. From the Property Set Type list, choose the type of object that you want to compare.

If you are constructing a query for a scenario action, you can compare the document property with a user, session, request, or event property.

If you are constructing a query for a content selector, you can compare the document property with a user, session, or request property.

For example, you created a document property called `investorRiskLevel` to identify whether a document describes an investment that is aggressive, moderate, or conservative. Your customer profiles also include a property called `investorRiskLevel` to indicate whether a customer prefers aggressive, moderate, or conservative investments. To create a content selector query that matches documents with a customer's investment-risk preference, in the Content Search window, you select the `investorRiskLevel` document property. In the Content Search Values window, you click the Properties tab. From the Comparison list, select Is Equal To. Then from the Property Set Type list, select User. (See Figure 3-14.)

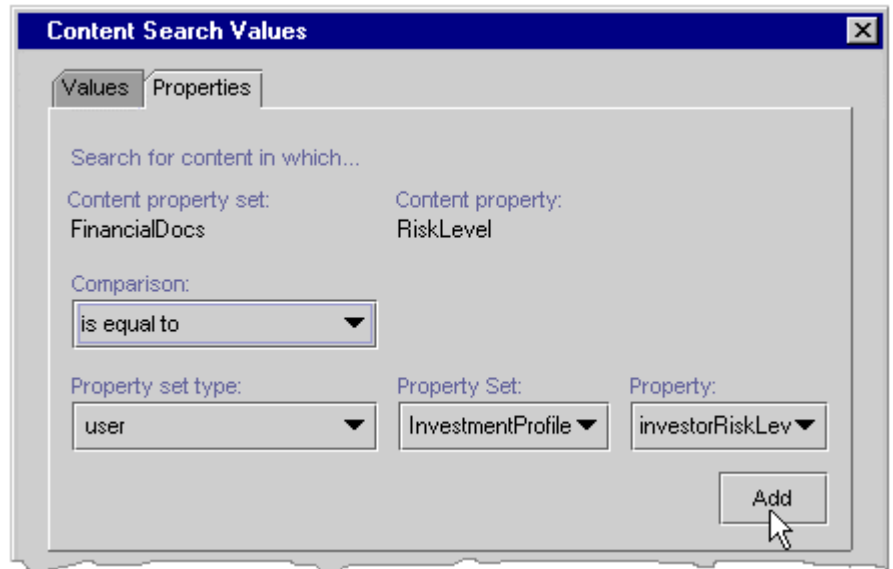
4. From the Property Set list, choose the property set that contains the properties of the object that you want to compare.

For example, if you place the `investorRiskLevel` user property in a property set named `InvestmentProfile`, then choose `InvestmentProfile` from the Property Set list.

5. From the Property list, choose a property.
6. Click Add.
7. Do one of the following:

- To compare the document property with additional object properties, repeat steps 1 through 6.
- To select another document property, click OK and return to “Select a Document Property” on page 3-16.
- To complete the query construction, go to “Specify How to Handle Multiple Value Phrases and Descriptors” on page 3-20.

Figure 3-14 Find Documents by Comparing the Properties of a User



Specify How to Handle Multiple Value Phrases and Descriptors

1. If you created multiple comparisons, in the Ad/Content Search Values window, under For Multiple Value Phrases, choose one of the following:
 - Qualifying Items May Match ANY Value Phrase if the property value phrase must match at least one of the value phrases.

- Qualifying Items Must Match ALL Value Phrases if the phrase must match each of the value phrases.
2. In the Ad/Content Search Values window, click OK.
 3. To create additional comparisons, click Add and return to “Select a Document Property” on page 3-16.
 4. If you created multiple descriptors, from the Ad/Content Search window, under For Multiple Descriptors, choose one of the following:
 - Qualifying Items May Match ANY Descriptor if the property value phrase must match at least one of the descriptors.
 - Qualifying Items Must Match ALL Descriptors if the phrase must match each of the descriptors.
 5. In the Ad/Content Search window, do either of the following:
 - Preview the Query Results
 - Click OK to finish constructing the query.

Preview the Query Results

To run the query and see the documents that it finds, do the following:

1. In the Ad/Content Search window click Preview.
The E-Business Control Center prompts you for a user ID.
2. In the Enter the User ID window, enter the ID of a customer (or a sample customer) who represents a specific set of customer properties. Then click OK.

For example, you want to see the documents that the query returns for customers with a conservative investment profile. The customer profile for Pat Gomes specifies a conservative investment profile, so you enter Pat’s ID.

Note: You must enter a user ID, regardless of the type of condition that activates a placeholder, scenario action, or content selector.

The E-Business Control Center runs the query and displays the results in your default browser. (See Figure 3-15.)

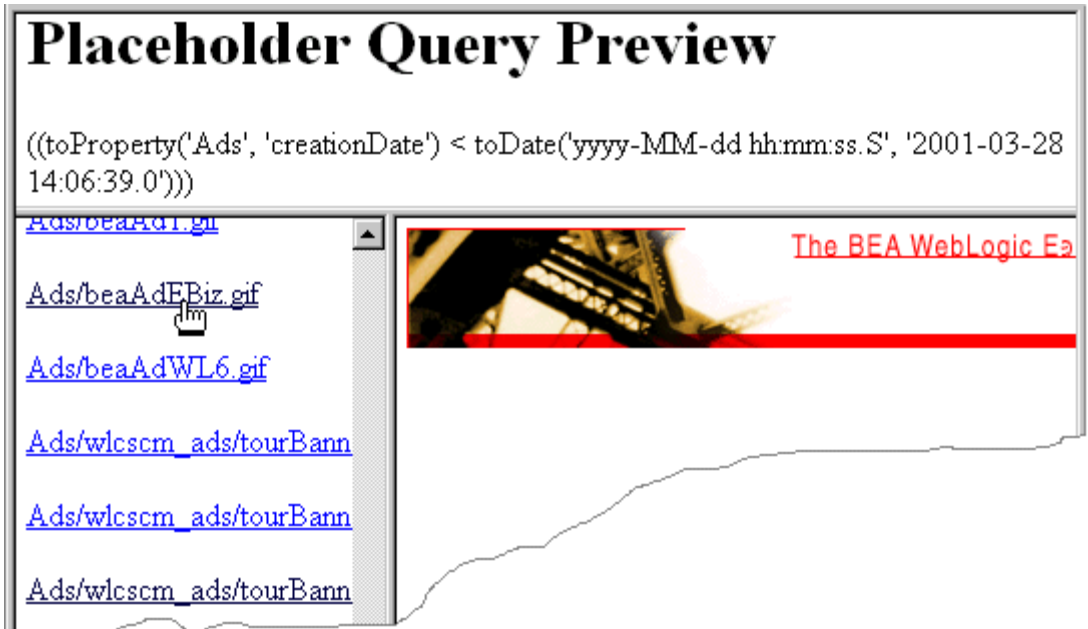
The top pane displays the query and the left pane displays the names of the ads that the query finds.

3. To see a document in your browser, click the name of the document in the left pane.

The right pane of your browser displays the document.

Note: WebLogic Commerce Server and Personalization Server create a short-lived cache that stores the results of a query. If you add or modify documents in your content management system and then immediately redo the query preview, you might not see the results of your modifications. If this occurs, wait several minutes and then retry the query preview.

Figure 3-15 Query Preview in the Browser



4. In the Ad/Content Search window, you can either modify the query or click OK to finish constructing the query.

4 Using Customer Segments to Target High-Value Markets

This topic contains basic information about customer segments as they are used in the BEA E-Business Control Center. This information includes a conceptual description of a customer segment, an explanation about how you might want to use customer segments, and step-by-step instructions for creating a new customer segment or modifying existing customer segments within the E-Business Control Center.

This topic includes the following sections:

- What Is a Customer Segment?
 - What Is a Customer Profile?
 - Creating Customer Segments from Information Stored in Customer Profiles
- Uses of Customer Segments
 - Targeting Content to Online Customers
 - Displaying Personalized Content Within Promotional Campaigns
- Creating a New Customer Segment
- Locating an Existing Customer Segment
- Modifying an Existing Customer Segment
- Deleting an Existing Customer Segment

What Is a Customer Segment?

To understand what a customer segment is, you must first learn about customer profiles. Therefore, this section contains the following subsections:

- What Is a Customer Profile?
- Creating Customer Segments from Information Stored in Customer Profiles

What Is a Customer Profile?

A **customer profile** is a collection of information that is gathered, saved, and updated as customers visit your Web site, or from other offline sources. Customer profiles are unique to each customer and can contain a variety of information, from product preferences to the demographic data customers provide on form pages. The information stored in customer profiles is increasingly seen as the true lifeblood of e-business. Effectively managing, analyzing, and using customer intelligence gives you a significant advantage over your competitors, because you can target your highest-value markets with your highest-value services, and do it cost-effectively.

Because the E-Business Control Center works with the BEA WebLogic Personalization Server and the BEA WebLogic Commerce Server, the E-Business Control Center already supports some customer profile information out-of-the-box. However, the system is extremely flexible about the customer data it can store, and thus can easily be extended. If you believe that extending the E-Business Control Center would be helpful to your organization, you will initially need to collaborate with a Commerce Business Engineer (CBE) or other technical resource who can make modifications to the tool. If possible, you should initiate this process before starting to use the E-Business Control Center.

Note: For technical information about how a Web site gathers customer profile information, see “Creating and Managing Users and Groups” in the *Building Personalized Applications* documentation at <http://edocs.bea.com/wlcs/docs35/p13ndev/users.htm>.

Creating Customer Segments from Information Stored in Customer Profiles

The customer profile information you collect can be used to create customer segments within the E-Business Control Center. A **customer segment** is a grouping of customers based on common characteristics from their profile, such as product preferences or age. Each piece of information stored in a customer's profile (or any combination of that information) can be used to create a customer segment.

Using the sample customer profile information shown in Figure 4-1, there are a few customer segments you might create.

Figure 4-1 Example Customer Profile Information

Login	Date of Birth	Favorite Category	...
janedoe	7/22/1975	office supplies	
jblack	12/18/1970	garden tools	
asmith	5/2/1985	office supplies	
.			
:			

Based on the Favorite Category profile information, you might create a customer segment named Office Supply Junkie, which would include the customers janedoe and asmith. Similarly, a customer segment named Over21 would include the customers janedoe and jblack, based on their Date of Birth profile information.

For step-by-step instructions on creating new customer segments in the E-Business Control Center, see “Creating a New Customer Segment” on page 4-6.

Uses of Customer Segments

This section is intended to provide you with an overview of how you can use customer segments once you create them. Since there are two ways to use customer segments, this section contains the following subsections:

- Targeting Content to Online Customers
- Displaying Personalized Content Within Promotional Campaigns

Note: Depending upon the version of the E-Business Control Center you have, you may be able to use customer segments in one or both of the ways described in this section. For more information about the different versions of the E-Business Control Center that are packaged with the BEA Campaign Manager for WebLogic, the WebLogic Commerce Server, and the WebLogic Personalization Server, see “About the E-Business Control Center” on page 1-2 or the *Overview Tour* documentation at <http://edocs.bea.com/wlcs/docs35/intro/index.htm>.

Targeting Content to Online Customers

In all versions of the E-Business Control Center, customer segments can be utilized in conjunction with content selectors to personalize a customer’s experience on your Web site.

A **content selector** is a mechanism used to retrieve documents from a content management system. A **document** is a graphic, a segment of HTML or plain text, or a file that must be viewed with a Web browser plug-in. Using content selectors, you can specify the conditions under which one or more documents are retrieved.

If you use a customer’s membership in a segment as one of these conditions, you can specify that a particular piece of content be selected from the content management system and displayed to that customer. So, for example, customers who belong to an Office Supply Junkie segment may be shown an article titled: “Reducing Desk Clutter With Stackable Organizers.”

Note: To use customer segments with content selectors, you should collaborate with your organization’s Commerce Business Engineer (CBE) or other technical resource. This is a more complex task that does require some degree of technical expertise. For more technical information about content selectors, see Chapter 5, “Retrieving Documents with Content Selectors.”

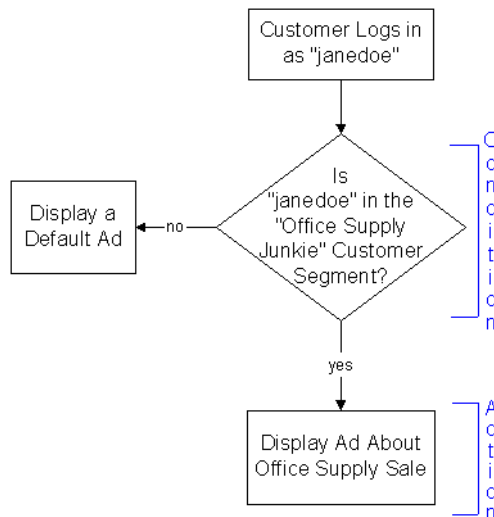
Displaying Personalized Content Within Promotional Campaigns

If you have the version of the E-Business Control Center that comes with the Campaign Manager for WebLogic, you can also use customer segments within your promotional campaigns.

As part of a promotional campaign, a customer's membership in a particular segment may be used as a condition to trigger a specific action, such as sending an e-mail, offering a discount, or displaying an ad. For example, if janedoe is a member of the Office Supply Junkie customer segment, you might want to display an ad about an upcoming sale on office supplies to Jane when she logs in. Because such actions are only triggered under certain conditions, you can use customer segments to target only the appropriate audience(s) with your campaign content.

The flowchart shown in Figure 4-2 illustrates how customer segments can be used as conditions to trigger specific, campaign-related actions.

Figure 4-2 Condition Based on Membership in a Customer Segment



Note: If you have the version of the E-Business Control Center that comes with the Campaign Manager for WebLogic and want detailed instructions about how to use customer segments within promotional campaigns, see the “Add Scenarios to the Campaign” section in the *Working With Campaigns* documentation.

Creating a New Customer Segment

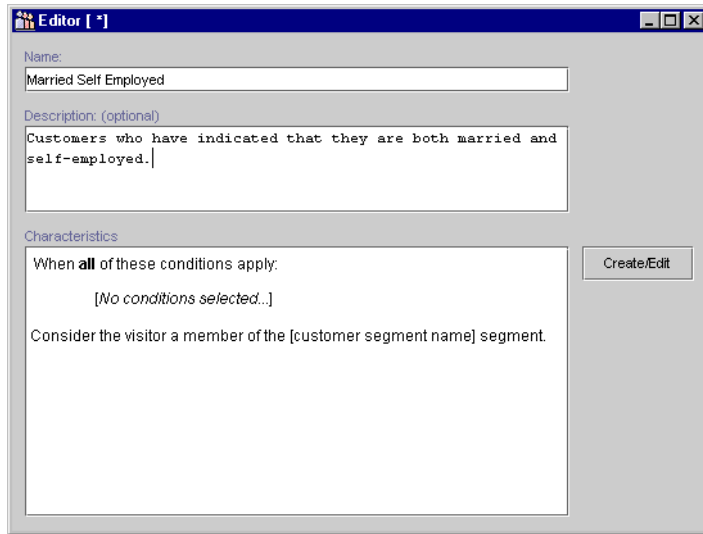
Initially, you will probably want to spend some time creating new customer segments for use in the E-Business Control Center. This section provides step-by-step instructions you can follow to accomplish this task. If you have already created customer segments and need to edit them, see “Modifying an Existing Customer Segment” on page 4-13.

Note: Before you can create a new customer segment, you must connect the E-Business Control Center to a server. For more information on connecting to a server, see “Connecting the BEA E-Business Control Center to a Server” on page 2-1.

To create a new customer segment, follow these steps:

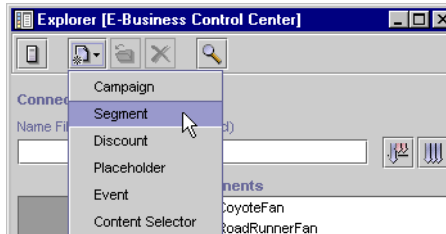
1. From the BEA E-Business Control Center File menu, select New → Segment. The Customer Segment Editor window opens, as shown in Figure 4-3.

Figure 4-3 Customer Segment Editor Window



Tip: You can also click the New icon in the Explorer window and then select Segment to open the Customer Segment Editor window, as shown in Figure 4-4.

Figure 4-4 New Icon, Segment Selection

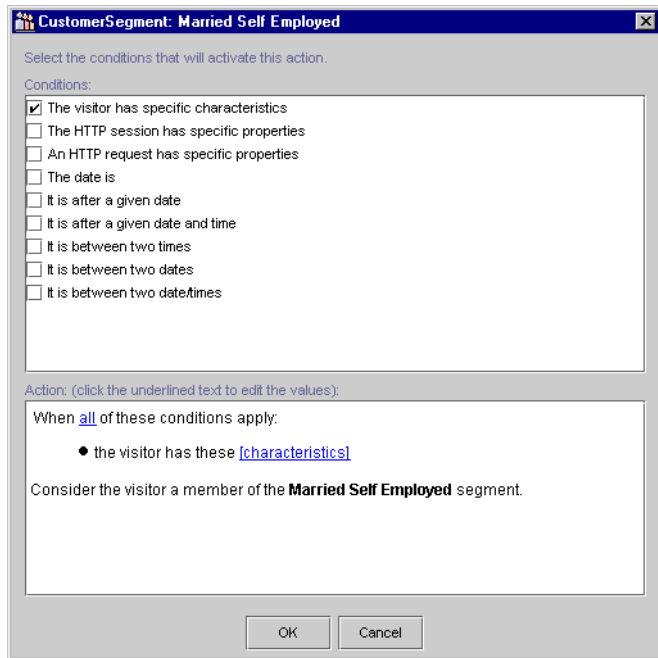


2. In the Customer Segment Editor window, follow these steps:
 - a. Enter a unique, descriptive name for the customer segment in the Name field. An example of a customer segment name might be *Married Self Employed*, as shown in Figure 4-3.
 - b. If desired, enter a description of the customer segment in the Description area.

- c. Click Create/Edit. The window where you will provide details about the customer segment opens, as shown in Figure 4-5.

Warning: Be sure you choose the name of the segment with care. After it is saved, you will not be able to change the name unless you delete and recreate the customer segment.

Figure 4-5 Customer Segment Details Window



3. Click the check boxes shown in the Conditions portion of the Customer Segment details window to select the condition(s) under which a visitor should be considered a member of the segment. Text describing the conditions you selected appears in the Action portion of the window.

Note: You must add at least one condition, or you will not be able to save the customer segment. For an explanation of the possible conditions, see “Listing of the Available Conditions” on page 3-2.

Tip: You can use conditions in ways that always evaluate to true. For example, you can select the It Is After A Given Date condition and then specify the date as January 1, 1970.

- For each condition you selected in step 3, you must specify values for any hyperlinked text that appears in the Action portion of the window.

For example, if you selected The Visitor Has Specific Characteristics condition as shown in Figure 4-5, you must specify a value for the hyperlinked [characteristics] text in The Visitor Has These [Characteristics] statement.

To specify values for hyperlinked text, just click the text. Depending upon the condition and the hyperlink, a window or a dialog box opens. Table 4-1 provides a consolidated listing of the conditions and indicates where to look if you need detailed instructions for any of the corresponding windows/dialog boxes.

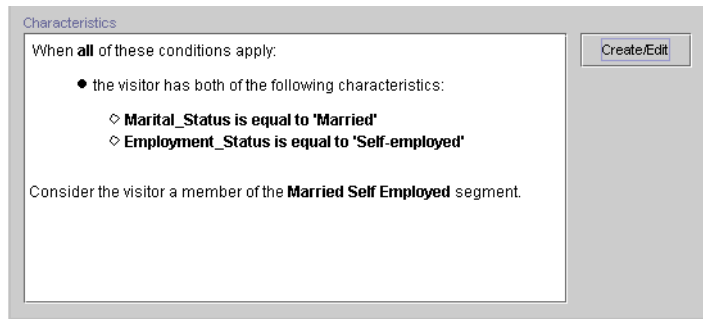
Note: Table 4-1 shows all the conditions that may be used within the E-Business Control Center. Therefore, not all conditions shown here may apply.

Table 4-1 Instructions for Building Conditions


Condition(s)	Relevant Instructions
The visitor is a member of a predefined customer segment	“Using the Select Customer Segments Window” on page 3-4.
A visitor, HTTP session, HTTP request, or an event has specific characteristics	“Using the Properties and Property Values Windows” on page 3-5.
An event (such as login or click) has occurred.	“Using the Select Events Window” on page 3-9.
Dates and times	“Using the Date/Time Entry Dialog Boxes” on page 3-10.
There is a specific item in the shopping cart, there is an item from a given category in the shopping cart, the value of items in the cart is a certain amount	<p>“Using the Quantity Selector or Currency Selector Dialog Boxes” on page 3-11.</p> <p>“Using the Select Operator Dialog Box” on page 3-12.</p> <p>“Using the Enter SKU Numbers or Enter Categories Windows” on page 3-13.</p>
A random number falls within a given range	“Using the Enter a Range Dialog Box” on page 3-14.

5. If you selected more than one condition in step 3, you may want to click the All hyperlink in the When All Of These Conditions Apply phrase to change All to Any.
Note: The Any/All link acts as a toggle. Clicking Any will change it to All, and visa versa.
6. Click OK. The Customer Segment details window closes. The conditions and corresponding actions you specified appear in the Customer Segment Editor window's Characteristics list, as shown in Figure 4-6.

Figure 4-6 Customer Segment Editor Window: Characteristics List



7. From the BEA E-Business Control Center File menu, select Save to save the customer segment, then close the Customer Segment Editor window.

Tip: You can also click the Save icon () shown on the BEA E-Business Control Center toolbar to save the customer segment.

The name of the new customer segment appears in the Segments list of the Explorer window, as shown in Figure 4-7.


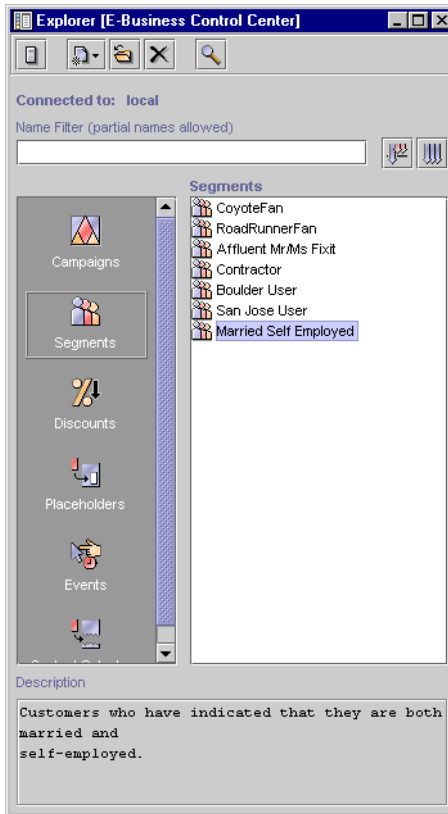
Note: If you do not see the segments, click  (located on the left side of the Explorer window) to enable the Segments view.

Figure 4-7 Explorer Window: Segments View



Now, single-clicking the segment name will cause its description to appear at the bottom of the Explorer window.

Tip: Holding the mouse over the segment name will also show you the segment description.

Locating an Existing Customer Segment

If you have defined many customer segments, it can be time consuming to locate a particular segment by simply looking in the Segments list. Therefore, the E-Business Control Center provides you with a mechanism to filter existing customer segments by name.

To locate an existing customer segment using the name filter, follow these steps:




1. Click  (located on the left side of the Explorer window) to enable the Segments view. A list of segments appears in the Segments list.
2. In the Name Filter field (shown in Figure 4-8), type the name of the customer segment you want to locate.

Figure 4-8 Name Filter Field




- Note:** You can type full or partial names into the Name Filter field. Customer segment names are case sensitive. Therefore, filtering based on the text “Married” will not locate segments with names that start with “married.”
3. Click the Filter icon () to filter the segments shown in the Segments list. The segments that have names beginning with the text you entered appear in the Segments list.
- Note:** To return to the full list of customer segments, click the Show All Objects icon ().

Modifying an Existing Customer Segment


The E-Business Control Center also allows you to view and modify existing customer segments.

To open an existing customer segment for modification, follow these steps:



1. If necessary, click  (located on the left side of the Explorer window) to enable the Segments view. A list of segments appears in the Segments list.
2. Click the name of the segment you want to modify. The customer segment is highlighted.


Tip: If there is a long list of segment names, you might want to use the name filter to locate the segment you want to modify. For more information about the name filter, see “Locating an Existing Customer Segment” on page 4-12.

3. Click the Open icon () shown on the Explorer toolbar. The Customer Segment Editor window opens.

Tip: You can also open the segment by double-clicking on the segment name.

4. You can now modify any part of the segment, except for the segment name. Follow the same instructions for creating a new segment, discussed in “Creating a New Customer Segment” on page 4-6.

5. Be sure to save your modifications by selecting Save from the BEA E-Business Control Center File menu.

Tip: You can also click the Save icon () shown on the BEA E-Business Control Center toolbar to save the customer segment.

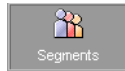
Warning: If the customer segment you modify is in use by content selectors, promotional campaigns, or other objects, saving modifications to the segment will affect every object that refers to that segment. Be certain that the modifications you make are in line with your organization’s established policies and that you entered the modifications correctly in the E-Business Control Center.


Deleting an Existing Customer Segment

You can also delete existing customer segments using the E-Business Control Center.

Warning: As with any deletion you make, be absolutely certain that you select the correct customer segment and that you are sure you want to delete it. Deleted segments cannot be retrieved. If you delete a customer segment, anything that refers to it (content selectors, promotional campaigns, or other objects) will effectively be broken until the segment is dereferenced or a segment with the same name is created.

To delete an existing customer segment, follow these steps:



1. If necessary, click  (located on the left side of the Explorer window) to enable the Segments view. A list of segments appears in the Segments list.
2. Click the name of the customer segment you want to delete. The customer segment is highlighted.

Tip: If there is a long list of segment names, you might want to use the name filter to locate the segment you want to modify. For more information about the name filter, see “Locating an Existing Customer Segment” on page 4-12.

3. To delete the segment, click the Delete icon () shown on the Explorer toolbar.

5 Retrieving Documents with Content Selectors

You can enrich a visitor's experience on your Web site by providing information that matches the visitor's interests or expectations. Using content selectors, you can specify conditions under which WebLogic Personalization Server retrieves one or more documents from your content management system. For example, you can use a content selector to encapsulate the following conditions: between May 1 and May 10, if a customer in the SailingEnthusiast customer segment views this page, find and retrieve any documents that describe sailing along the Maine coast.

A *document* is a graphic, a segment of HTML, or a file that must be viewed with a browser plug-in. We recommend that you store most of your Web site's dynamic documents in a content management system because it offers an effective way to store and manage information.

A Business Analyst (BA) uses the BEA E-Business Control Center to define the conditions that activate a content selector and to define the query the content selector uses to find and retrieve documents. Then, a Commerce Business Engineer (CBE) uses content selector JSP tags and a set of other JSP tags that display the content in JSPs.

This topic includes the following sections:

- What Are Content Selectors?
- Describing Documents in Your Content Management System
- Defining Content Selectors

What Are Content Selectors?

Content selectors specify conditions under which they query the content management system for documents. They consist of the following elements:

- A set of conditions that determine when the content selector queries the content management system. The conditions can use the profile of the customer who is currently viewing a JSP page, an event that occurs on the page or has occurred previously on some other page, or the current time. For a complete list of conditions, refer to “Listing of the Available Conditions” on page 3-2.

BAs create and modify the set of conditions in the E-Business Control Center.

- A query that searches the content management system for one or more documents.

BAs create and modify the query in the E-Business Control Center.

- A JSP tag that triggers the content selector to evaluate its conditions.

To display the documents that the query finds, a CBE must use an additional set of tags. For information about using content-selector tags and other tags that display the query results, refer to “Working with Content Selectors” in *Guide to Building Personalized Applications*, which is located at <http://edocs.bea.com/wlcs/docs35/p13ndev/cs4cbe.htm>.

Describing Documents in Your Content Management System

The queries that you define for content selectors search through the descriptions (attributes) that you attach to the documents in your content management system. WebLogic Personalization Server places no restrictions on the set of attributes that you use to describe your documents. For example, you can create attributes that describe a

document's author, creation date, and subject. When you define a query, the E-Business Control Center presents all of the attributes that your content management currently contains.

We recommend that you analyze your overall personalization strategy and create attributes that you can use across customer segments. The more your attributes apply to multiple customer segments, the less often you need to create new attributes.

For information on creating attributes, refer to the documentation for your content management system. To learn more about using a content management system with WebLogic Personalization Server, refer to "Creating and Managing Content" in *Guide to Building Personalized Applications*, which is located at <http://edocs.bea.com/wlcs/docs35/p13ndev/content.htm>.

Defining Content Selectors

To define a content selector, you need the following information:

- A unique name for the content selector. A CBE uses JSP tags that refer to this name. The Explorer window in the E-Business Control Center lists the names of all content selectors in your data repository.
- The conditions that activate the content selector to search for documents. For a description of the conditions that you can use, refer to "Listing of the Available Conditions" on page 3-2.
- The attributes that you use to describe the documents in your content management system.

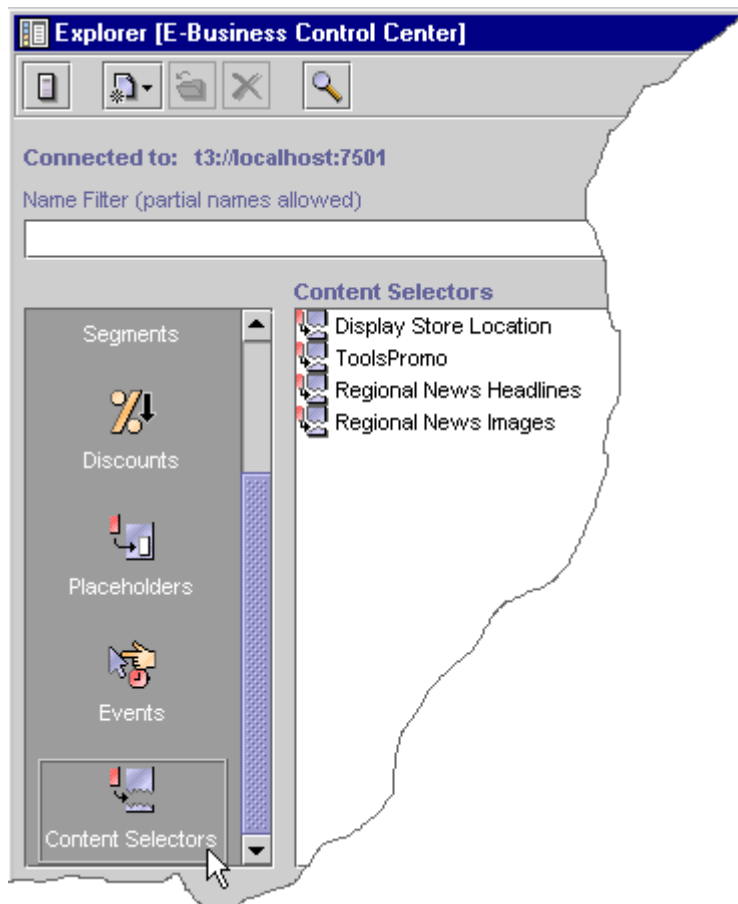
To Define a Content Selector

1. Start E-Business Control Center and connect to WebLogic Commerce Server and WebLogic Personalization Server. For information about connecting to a server, see Chapter 2, "Connecting the BEA E-Business Control Center to a Server."
2. To see a list of existing content selectors, do the following:
 - a. From the E-Business Control Center menu, select Window → Open Explorer.

- b. In the Explorer window, click Content Selectors.

The E-Business Control Center displays a list of all content selectors in your data repository. (See Figure 5-1.)

Figure 5-1 Content Selectors in the Explorer Window



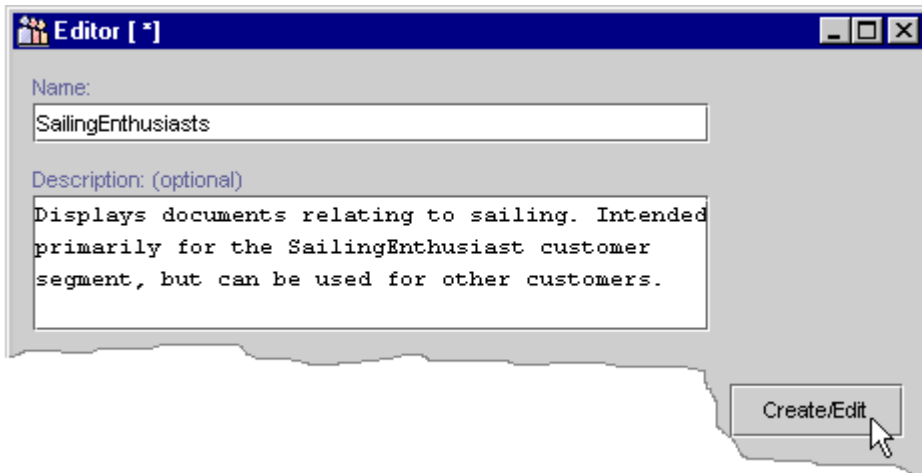
3. From the E-Business Control Center menu, select File → New → Content Selector.

E-Business Control Center displays the Content Selector Editor.

4. In the Content Selector Editor, in the Name box, enter a name. The content selector JSP tags that CBEs use refer to this name.

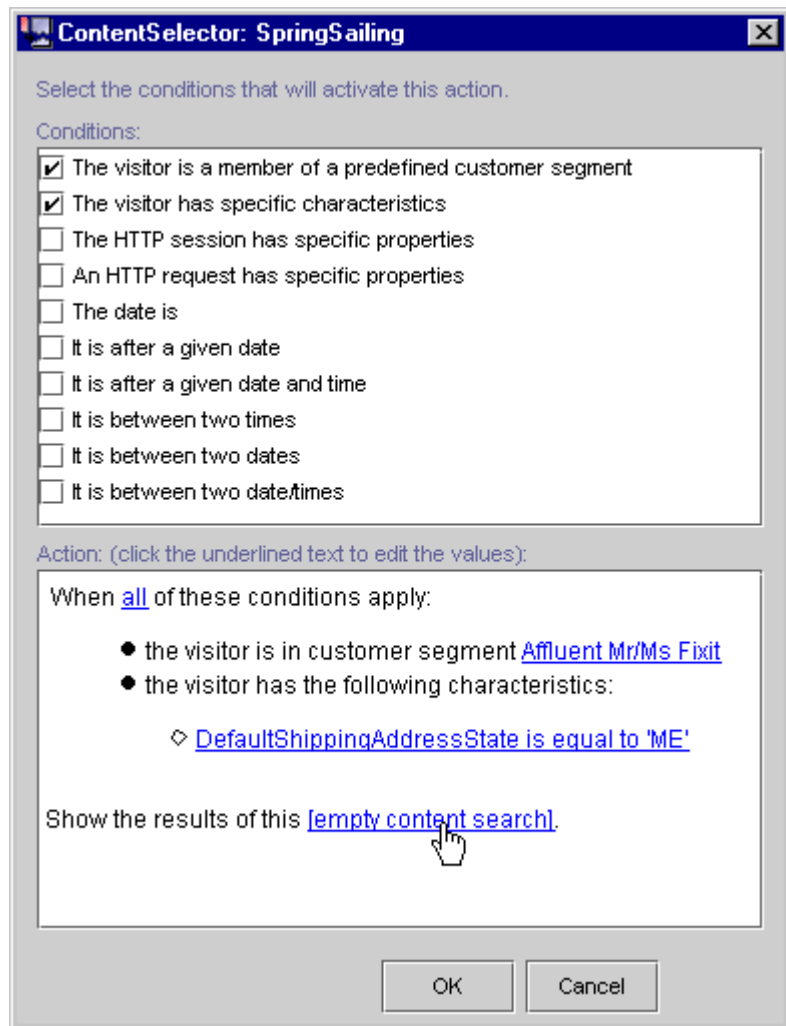
5. In the Description box, document the intended use of this content selector. The description only displays in the Content Selector Editor. (See Figure 5-2.)

Figure 5-2 The Content Selector Editor



6. To create one or more conditions that activate this content selector, click Create/Edit. For a description of the conditions that you can use to trigger a content selector, refer to “Listing of the Available Conditions” on page 3-2.
For information on creating conditions, refer to “Using the Select Customer Segments Window” on page 3-4.
7. To create a query for the content selector, click the [empty content search] hypertext link under Action in the Content Selector window. (See Figure 5-3.)
8. For information about creating queries, refer to “Constructing Queries” on page 3-15.

Figure 5-3 Create a Query



9. In the Content Selector Editor, click Save. (See Figure 5-4.)

Figure 5-4 Saving the New Content Selector

The screenshot shows a window titled "Editor [Unnamed Content Selector *]" with a standard Windows-style title bar. The window contains the following fields and controls:

- Name:** A text box containing "SailingEnthusiasts".
- Description: (optional):** A text area containing the text: "Displays documents relating to sailing. Intended primarily for the SailingEnthusiast customer segment, but can be used for other customers."
- Selection rule:** A text area containing the text: "When all of these conditions apply:" followed by a bulleted list:
 - the visitor is in customer segment [Affluent Mr/Ms Fixit](#)
 - the current date-time is between [May 01, 2001 at 12:00:00 AM](#) and [May 10, 2001 at 12:00:00 AM \(UTC-05:00 hours\)](#)Below the list, it says "Show the results of this [content search](#)."
- Buttons:** A "Create/Edit" button is located to the right of the selection rule text area. At the bottom of the window are "Save" and "Close" buttons. A mouse cursor is pointing at the "Save" button.

6 Displaying Ads

An integral part of most e-commerce Web sites is displaying advertisements and tracking your customers' responses. With WebLogic Personalization Server, you can use ad placeholders to display ads and to manage and evaluate the effectiveness of your advertising strategy. If you use BEA Campaign Manager, you can use ad placeholders to target ads to specific customers as a part of a campaign.

Ad placeholders decrease the cost of displaying ads on your site by providing a single infrastructure that supports multiple advertising projects that change over time. Once a Business Analyst (BA) and a Commerce Business Engineer (CBE) create the ad placeholder infrastructure, a BA can use the E-Business Control Center to add or change advertising projects; a CBE does not need to modify your Web site's Java Server Pages (JSPs) to modify your advertising strategy.

This topic includes the following sections:

- What Is an Ad Placeholder?
- Describing Ads in Your Content Management System
- Specifying Display and Clickthrough Behavior
- Creating Ad Placeholders
- Alternatives to Ad Placeholders

What Is an Ad Placeholder?

An ad placeholder is a mechanism for finding ads that are in your content management system and displaying them on your Web site. To find an ad, the placeholder uses a query that you define. For example, you can define a query that searches your content management system for ads created last week advertising electric drills for the ACME company.

You can change the queries that a placeholder runs at any time. For example, as part of a special promotion during April, you create a placeholder to display ads in a left navigation bar of your site. In May, you remove the queries from the placeholder. In July, you decide to use the same placeholder to display ads for a different advertising project.

This section contains the following subsections:

- Types of Queries That Ad Placeholders Run
- Priorities for Running Ad Queries
- Ad Weights
- Infrastructure for Displaying Ads
- Types of Documents That Ad Placeholders Display

Types of Queries That Ad Placeholders Run

Ad placeholders can run a default query or a query that is associated with a specific scenario in a campaign.

You create default ad queries when you define the ad placeholder in the E-Business Control Center. A placeholder runs a default query each time a customer loads a page that includes the placeholder. For example, you define a default query for a top banner placeholder and the placeholder runs the query each time a customer loads a page with the top banner.

You create scenario queries when you define scenario actions in the E-Business Control Center. (Scenario actions, which are available only with BEA Campaign Manager, specify a list of actions to take in response to a chain of events.) A placeholder contains a scenario query only if a customer or an event triggers the scenario action. For example, you create a scenario that does the following: When a customer adds a handsaw product to the shopping cart, the scenario places an ad for miter boxes in the ad placeholder on the shopping cart page. When the customer requests the shopping cart page, the shopping cart ad placeholder runs the query for miter box ads and displays the results.

You can set up a placeholder to ignore default queries if any scenario actions have specified a query for the placeholder, or you can allow a system of priorities to choose a query.

Priorities for Running Ad Queries

Only one ad can display in an ad placeholder at any given time. Yet an ad placeholder can contain many queries, especially if you use BEA Campaign Manager with multiple campaigns active concurrently.

To establish your preferences for queries that should run more frequently than other queries, you attach a priority to a query when you create it. Before it runs a query, an ad placeholder evaluates all of the relative priorities of the queries that it contains. Then it gives the queries with higher priorities a greater chance of being selected. On average, an ad query with a higher priority will run more frequently than a query with a lower priority. However, in any single instance, it is possible that a placeholder runs a query with a lower priority than other queries.

For more information, refer to “Resolving Ad Query Conflicts,” under “Working with Ad Placeholders” in *Guide to Building Personalized Applications*, which is located at <http://edocs.bea.com/wlcs/docs35/pl3ndev/ph4cbe.htm>.

Ad Weights

Even after a placeholder uses priorities to select from multiple queries, the query that it runs can return multiple ads, depending on how broadly you define the query. You can establish your preferences for ads that should display more frequently than other

ads by creating a document attribute called `adWeight` in your content management system. You assign a higher number to the ads that you want to display more frequently.

For more information about the `adWeight` attribute, refer to “Ad Attributes in the Content Management System” under “Working with Ad Placeholders” in *Guide to Building Personalized Applications*, which is located at <http://edocs.bea.com/wlcs/docs35/p13ndev/ph4cbe.htm>.

Infrastructure for Displaying Ads

After you create a new placeholder, a CBE must use a special tag (the `<ph:placeholder>` JSP tag) in the location that you want to display ads. For example, if you create a placeholder to display ads in the top banner, a CBE must add a `<ph:placeholder>` tag to the top banner.

When a customer accesses a page that contains a placeholder JSP tag, the tag starts the process of choosing a query, running the query, and then generating the HTML tags that the browser needs to display the ad.

Once a CBE uses this tag on a page on your Web site, you use the E-Business Control Center to change the queries that the tag can run; you do not need a CBE to modify the tag.

For information on how CBEs use placeholder JSP tags, refer to “Working with Ad Placeholders” in *Guide to Building Personalized Applications*, which is located at <http://edocs.bea.com/wlcs/docs35/p13ndev/ph4cbe.htm>.

Types of Documents That Ad Placeholders Display

By default, ad placeholders can display only the following types of documents:

- XHTML (a fragment or an entire document)
- Images
- Shockwave files

A CBE can set up WebLogic Personalization Server to support additional types of documents. For more information, refer to “Supporting Additional MIME Types” under “Working with Ad Placeholders” in *Guide to Building Personalized Applications*, which is located at <http://edocs.bea.com/wlcs/docs35/p13ndev/ph4cbe.htm>.

Describing Ads in Your Content Management System

The queries that you define for ad placeholders search through the descriptions (attributes) that you attach to the documents in your content management system. WebLogic Personalization Server places no restrictions on the set of attributes that you use to describe your ads. For example, you can create attributes that describe the name of the product that the document advertises, the name of the ad sponsor, and a product category that matches the categories in your e-commerce product catalog. When you define a query, the E-Business Control Center presents all of the attributes that your content management currently contains.

We recommend that you analyze your overall advertising strategy and create attributes that you can use across several advertising projects. The more your attributes apply to multiple advertising projects, the less often you need to create new attributes. In addition, review the way in which you define customer segments and consider creating attributes that complement customer segments. For example, if you define customer segments for conservative or aggressive investment portfolios, create an ads attribute called `portfolio-type`, and use it to describe investment products that you advertise.

Consider as well that if you use BEA Campaign Manager, your site might run multiple campaigns concurrently and that each campaign might contain several scenarios that define ad queries for a placeholder. The attributes for your ads need to be specific enough that each scenario can define reasonably precise queries for the placeholders that they use.

For information on creating attributes, refer to the documentation for your content management system. To learn more about using a content management system with WebLogic Personalization Server, refer to “Creating and Managing Content” in *Guide to Building Personalized Applications*, which is located at <http://edocs.bea.com/wlcs/docs35/p13ndev/content.htm>.

Specifying Display and Clickthrough Behavior

In addition to the attributes that placeholder queries use to find documents, ad placeholders use a set of attributes to do the following:

- Create a target URL for click through behavior on images.
- Determine whether the target for a clickthrough of an image ad displays in a popup window. The ad placeholder generates the necessary JavaScript to display the popup window, and it can generate a link that customers click to close the popup window.
- Set the quality parameter for a Shockwave file.

A CBE, or someone familiar with creating hyperlinks in HTML and with developing Shockwave movies, can create these attributes. For information about these attributes, refer to “Ad Attributes in the Content Management System” under “Working with Ad Placeholders” in *Guide to Building Personalized Applications*, which is located at <http://edocs.bea.com/wlcs/docs35/p13ndev/ph4cbe.htm>.

Creating Ad Placeholders

After you define attributes for the documents in your content management system, you use the E-Business Control Center to define ad placeholders and to construct any default ad queries.

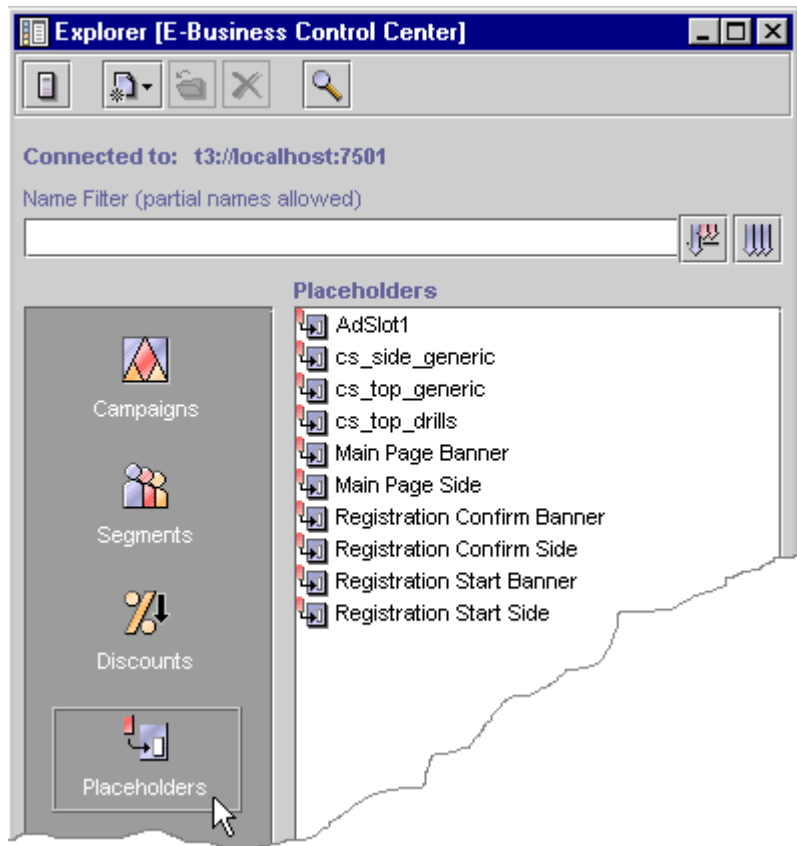
Then a CBE adds placeholder tags in the JSP files that you want to display ads.

To Create an Ad Placeholder

1. Start the E-Business Control Center and connect to WebLogic Commerce Server and WebLogic Personalization Server. For information about connecting to a server, see Chapter 2, “Connecting the BEA E-Business Control Center to a Server.”
2. To see a list of existing ad placeholders, do the following:
 - a. From the E-Business Control Center menu, select Window → Open Explorer.
 - b. In the Explorer window, click Placeholders.

The E-Business Control Center displays a list of all placeholders that are in your data repository. (See Figure 6-1.)

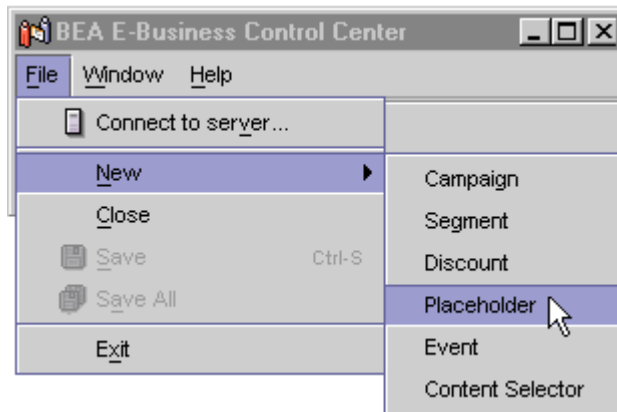
Figure 6-1 List of All Placeholders



3. To create a new placeholder, select File → New → Placeholder. (See Figure 6-2.)

The E-Business Control Center displays the Placeholder Editor.

Figure 6-2 Create a New Placeholder



4. In the Placeholder Editor, in the Name box, enter a name. The name must be unique to all placeholders that are stored in the WebLogic Personalization Server data repository.
5. If you want this placeholder to run default ad queries (queries that are not associated with an active campaign), click New. For information about constructing queries, refer to “Constructing Queries” on page 3-15.

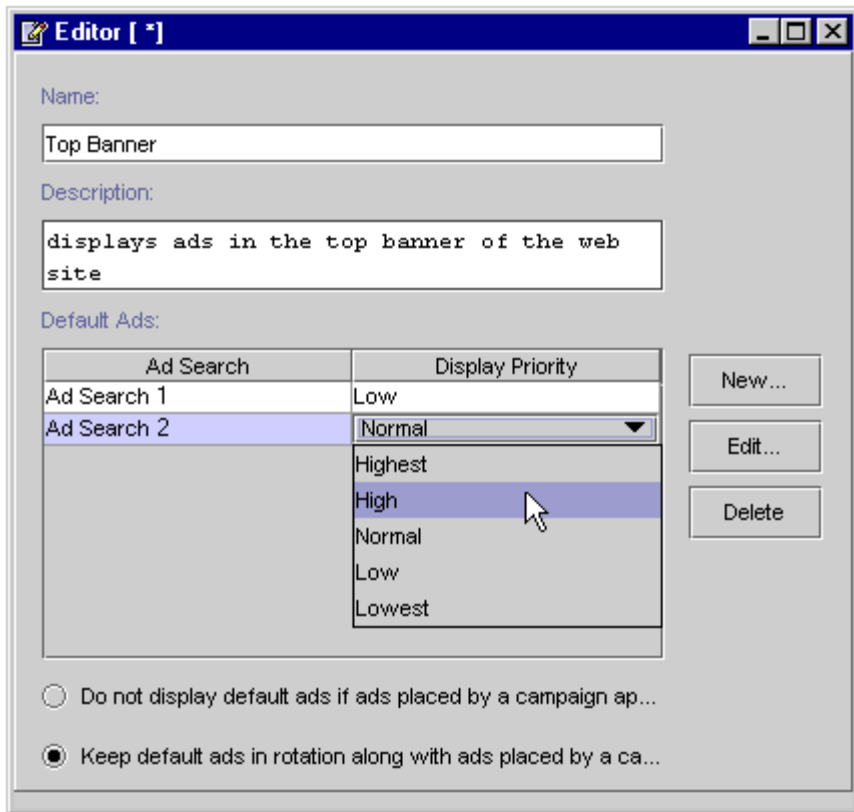
You can create multiple default queries by repeating this step.

If you do not create ad queries for default ads, then the placeholder will display only ads that are associated with a scenario action that you define when you create scenarios. If there are no active campaigns, or if an active campaign contains no ad actions within scenarios to trigger an ad for a specific customer, then the placeholder remains invisible to customers.

6. To change the priority of a default ad query, click the Display Priority column for the query and select a priority. (See Figure 6-3.)

The Display Priority determines the likelihood that the query runs relative to the priority of any other queries that are in the placeholder. For more information, refer to “Priorities for Running Ad Queries” on page 6-3.

Figure 6-3 Selecting a Display Priority



7. To prevent an ad placeholder from using default ad queries if the bucket also contains campaign ad queries, select the option, Do not display default ads if ads placed by a campaign apply.

If you want the placeholder to use both default and campaign ad queries, select the option, Keep default ads in rotation with ads placed by a campaign. This selection potentially reduces the chance that the placeholder displays a given ad that is part of a campaign. For more information, refer to “Priorities for Running Ad Queries” on page 6-3.

8. Select File → Save.

The E-Business Control Center saves your placeholder definition. If you create a scenario action (which is available only with BEA Campaign Manager), you can select this placeholder as a location to run ad queries.

Alternatives to Ad Placeholders

If it is essential that a customer see a specific ad in a specific location, a CBE can use an `<ad:adTarget>` tag instead of an ad placeholder.

Like an ad placeholder, `<ad:adTarget>` can do the following:

- Display the types of documents that are described in “Types of Documents That Ad Placeholders Display” on page 6-4.
- Use the display and clickthrough attributes that are described in “Specifying Display and Clickthrough Behavior” on page 6-6.
- Use ad weights to choose an ad if a query returns multiple documents, as described in “Ad Weights” on page 6-3.

However, the `<ad:adTarget>` is **unlike** ad placeholders in the following ways:

- It contains its own query in the JSP page; it does not refer to the queries that a BA creates in the E-Business Control Center. If you want to change the query, you modify the tag in the JSP.
- A campaign scenario cannot specify a query to run in an `<ad:adTarget>` tag. Scenarios can only use ad placeholders to run queries.
- Because it contains only a single query, it does not need to use the ad query priorities, as described in “Priorities for Running Ad Queries” on page 6-3.

For more information, refer to `<ad:adTarget>` under “JSP Tag Library Reference” in *Guide to Building Personalized Applications*, which is located at <http://edocs.bea.com/wlcs/docs35/p13ndev/jsptags.htm>.

7 Events

This topic provides information about standard events and how to register custom events. It is intended for use by Business Analysts or marketing professionals. The first part provides general information about events that you can use when writing scenarios actions. The second part tells you how to register custom events.

BEA supplies standard events with each product. A Java developer can create additional events, referred to as custom events. More information about custom events is provided in “Registering Custom Events” on page 7-5 and at <http://edocs.bea.com/wlcs/docs35/events/index.htm>.

In general, an event is a notification that something has happened in a computer program. Events are used for a variety of things. You can use events with campaigns to enhance promotion of products and services. You can also use a special kind of event called a behavior tracking event to gather intelligence about customer interactions on an e-commerce site. E-analysis and e-marketing systems use this information to help you understand your customers so that you can improve your marketing and build long-lasting customer relationships.

This topic contains the following sections:

- Standard Event Categories
- Standard Events
- Registering Custom Events

Standard Event Categories

Events are organized into categories. The following list presents each category of standard event along with a brief description:

- **Session:** The start time, end time, and if executed, the login time of the customer's session.
- **Registration:** The customer registers on the e-commerce site.
- **Product:** The customer is presented with a product or clicks (selects) the presented product.
- **Content:** The customer is presented some content, such as an ad, or clicks (selects) the presented content.
- **Cart:** An item is added, removed, or updated to the customer's shopping cart. Also when an entire order is purchased.
- **Buy:** The customer completes purchase of one or more items.
- **Rules:** The rules that are fired as a customer navigates a Web site.
- **Campaign:** The events generated within the context of a campaign.

Standard Events

This section describes standard events in more detail. You can use it to reference events when writing scenario actions. The following list presents each type of standard event along with a brief description:

Event	Description
SessionBeginEvent	Occurs when a customer begins interacting with a Web site. Specific to WebLogic Personalization Server. Available in Campaign Manager for WebLogic, WebLogic Commerce Server.
SessionEndEvent	Occurs when a customer leaves a Web site. Specific to WebLogic Personalization Server. Available in Campaign Manager for WebLogic, WebLogic Commerce Server.
SessionLoginEvent	Occurs when a customer logs on a Web site. Specific to WebLogic Personalization Server. Available in Campaign Manager for WebLogic, WebLogic Commerce Server.
UserRegistrationEvent	Occurs when customer registers on a Web site. Specific to the WebLogic Personalization Server Available in Campaign Manager for WebLogic, WebLogic Commerce Server.
ClickContentEvent	Occurs when a customer clicks some Web site content, such as a link or banner. Specific to WebLogic Personalization Server. Available in Campaign Manager for WebLogic, WebLogic Commerce Server.
ClickProductEvent	Occurs when a customer clicks a product link. Specific to WebLogic Commerce Server. Available in Campaign Manager for WebLogic.
DisplayContentEvent	Occurs when content presented is to a customer, commonly any content from a content management system. Specific to WebLogic Personalization Server. Available in Campaign Manager for WebLogic, WebLogic Commerce Server.

Event	Description
DisplayProductEvent	Occurs when a product is displayed to the customer. Specific to WebLogic Commerce Server. Available in Campaign Manager for WebLogic.
AddToCartEvent	Occurs when an item is added to a customer's shopping cart. Specific to WebLogic Commerce Server. Available in Campaign Manager for WebLogic.
RemoveFromCartEvent	Occurs when an item is removed from a customer's shopping cart. Specific to WebLogic Commerce Server. Available in Campaign Manager for WebLogic.
PurchaseCartEvent	Occurs once for an entire order, unlike the <code>BuyEvent</code> , which occurs for each line item. This event is useful for campaigns. You can use it when writing scenario actions to know when your customer makes a purchase with specific characteristics, such as an order greater than \$100 or the purchase of a particular product. Only present in Campaign Manager for WebLogic.
BuyEvent	Occurs when a customer completes the purchase. A <code>BuyEvent</code> occurs for each line item. A purchase may consist of one or more line items. A line item may consist of one or more items. For example, although a particular line item may have a quantity of four items, only one <code>BuyEvent</code> occurs. Specific to WebLogic Commerce Server. Available in Campaign Manager for WebLogic.
RuleEvent	Indicates the rules that were fired as a customer navigates a Web site. Specific to the WebLogic Personalization Server. Available in the Campaign Manager for WebLogic, WebLogic Commerce Server.

Event	Description
CampaignUserActivityEvent	Occurs when a customer participates in a campaign. Specifically, this event is fired whenever one or more scenario actions are true and the campaign service is activated. You can limit this event to a single occurrence for a particular scenario. This event is intended for use by analytic software. Only present in Campaign Manager for WebLogic.
DisplayCampaignEvent	Occurs when campaign content, such as an ad, is presented to the customer. Specifically, this event is fired whenever a campaign placeholder displays an ad placed in the ad bucket by a campaign. You can use this event to trigger another campaign. Analytic software uses this event to determine if a customer saw an ad as a result of a campaign. Only present in Campaign Manager for WebLogic.
ClickCampaignEvent	Occurs when a campaign item, such as an ad, is clicked by the customer. Specifically, this event is fired whenever a customer clicks a campaign ad that was placed in the ad bucket by a campaign. You can use this event to trigger another campaign. Analytic software uses this event to determine if a customer clicked on an ad as a result of a campaign. Only present in Campaign Manager for WebLogic.

Registering Custom Events

This topic contains basic information about registering custom events. This information includes background information about custom events, how to register events using the Events Editor in the BEA E-Business Control Center, and what you need to do when you make changes to custom events.

This topic contains the following sections:

- Overview of Creating a Custom Event

- Why Register an Event?
- Registering a Custom Event
- Updating a Registered Custom Event

Note: You cannot change any of the standard events supplied with the Campaign Manager for WebLogic, the WebLogic Commerce Server, or the WebLogic Personalization Server.

Overview of Creating a Custom Event

The creation of a custom event is a multiple-step process. The following list provides an overview of the process:

- Create the code that defines the event and event listener.
- Create the code to trigger the event with a JSP tag or an API call.
- Register the event using the instructions in this topic.
- To record the event data, modify the `weblogiccommerce.properties` file to include the new event and create an entry for the event in the `EVENT_Type` table.

You can find detailed information about defining an event, creating a trigger, modifying the `weblogiccommerce.properties` file, and creating an entry in the `EVENT_Type` table, at <http://edocs.bea.com/wlcs/docs35/events/index.htm>.

Why Register an Event?

When you create a custom event, you must register the event. Registering a custom event lets the E-Business Control Center know that the custom event exists. Registering permits campaign developers using the E-Business Control Center to create scenario actions that refer to the event. Registering also identifies the event's properties.

Whenever you change the event code, you must update the event registration. Conversely, whenever you change the event registration, you must also update the event code. A possible ramification of event modification is that the scenario actions that refer to the event's properties may need to be modified.

Registering a Custom Event

The Event Editor in the E-Business Control Center allows you to easily register a custom event. For the purpose of registering an event, you can consider an event property as a name-value pair. During the registration of a custom event, you specify the event's name, description, and one or more properties. Each property has a range, type of permissible value, and default value. The information you need to register for an event should be available from your Commerce Business Engineer (CBE) or Java developer.

The properties for a custom event includes the following information:

- **Data type:** Specifies the data type for your property. The possible values are Text, Numeric, Floating Point Number, Boolean, and Date/Time.
- **Selection mode:** Specifies whether an property has a single default value or a collection of default values.
- **Value range:** Specifies whether the defaults are restricted to one specific value, one or more specific values, or any value.

Note: When you set property values, you are not guaranteed that the property will adhere to these restrictions at run time. Events are not checked by the `SchemaManager` for adherence to a property schema. Therefore, you need to keep the event type definition and the event registration synchronized.

As the previous list suggests, a combination of property values are possible. The possible combinations of properties are listed here:

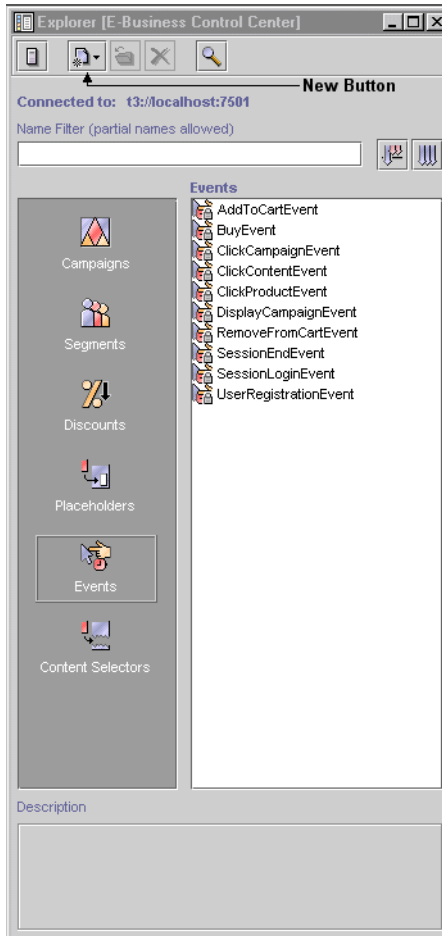
- **Boolean:** The values for this type of property are either True or False. You can choose the default. The default value is displayed only in the Enter Property Values Window, not in the Edit Event Property window. When this data type is selected, the Selection mode and Value range are unavailable.
- **Single, Unrestricted:** This type of property has only one value, which is also the default value.

- **Single, Restricted:** This type of property has multiple values and a single default value. You can select which value is the default.
- **Multiple, Restricted:** This type of property has multiple values. You can select one or more values as defaults values.
- **Multiple, Unrestricted:** This type of property has multiple values. You cannot select any defaults; all values are defaults

To create a custom event:

1. Start the E-Business Control Center and connect it to a server. The Explorer window opens as shown in Figure 7-1.

Figure 7-1 E-Business Control Center Window



Note: For more information on connecting the E-Business Control Center to a server, see Chapter 2, “Connecting the BEA E-Business Control Center to a Server.”

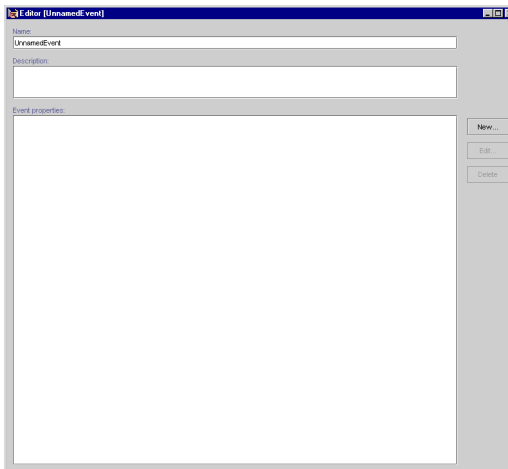
2. Open the Event Editor as follows:

Note: You cannot edit the standard events.

- a. In the Explorer window, select the Event icon. A list of events appears in the Events field.

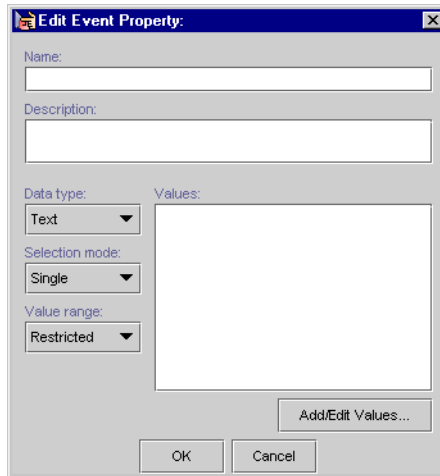
- b. Click the New Button, and then select Event. The Event Editor window appears as shown in Figure 7-2.

Figure 7-2 Event Editor Window



3. In the Edit Event Editor window, complete these steps:
 - a. In the Name field, enter a unique name for the event no longer than 100 characters (required).
 - b. In the Description field, enter a description for the event no longer than 254 characters (required).
 - c. Click the Save button in the E-Business system toolbar.
 - d. To create properties for the event, click the New button. The Edit Event Property window opens, as shown in Figure 7-3.

Figure 7-3 Edit Event Property Window



4. In the Edit Event Property window, complete these steps:
 - a. In the Name field, enter a unique name for the property no longer than 100 characters (required).
 - b. In the Description field, enter a description of the property no longer than 254 characters (required).
 - c. In the Data type list, select the data type. If you select Boolean as the data type, the Selection mode and Value range are no longer available. The default for Boolean is Single, Restricted.
 - d. In the Selection mode list, select either Single or Multiple.
 - e. In the Value range list, select whether the value is Restricted or Unrestricted.
 - f. Click the Add/Edit Values button.

The type of window that appears depends on the values selected.

Entering Property Values and Setting the Default Value

Depending on the data type, different steps are required for entering values and setting default values. The following property categories are available:

- Properties with Boolean or a Single Value and Single Default.

- Properties with Multiple Values and Single, Multiple, or All Defaults
- Properties with Date and Time Values

Properties with Boolean or a Single Value and Single Default

To enter the default value for Boolean property or a property with a single value and a single default (unrestricted), complete the following steps:

1. In the applicable Enter Property Value window (Figure 7-4 or Figure 7-5), perform one of the following:
 - For a Boolean property, select either True or False.
 - For a Single Value, Single Default property, enter a value.

Figure 7-4 Enter Property Values Window—Boolean

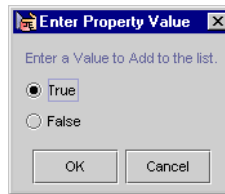
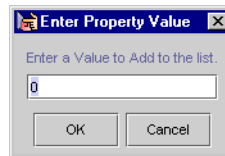


Figure 7-5 Enter Property Values Window—Single Value, Single Default



2. Click the OK button.
3. In the Edit Event Property window, click the OK button.

Properties with Multiple Values and Single, Multiple, or All Defaults

To enter multiple property values and set one or more defaults (unrestricted), complete the following steps:

1. In the applicable Enter Property Values window (Figure 7-6 or Figure 7-7), enter a value, and then click the Add button.

Figure 7-6 Enter Property Values—Multiple Values, Single Default

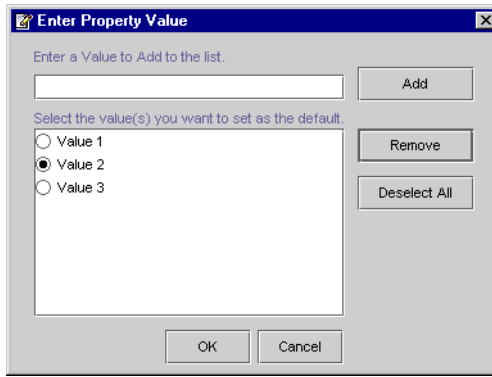


Figure 7-7 Enter Property Values—Multiple Values, Multiple Restricted Defaults

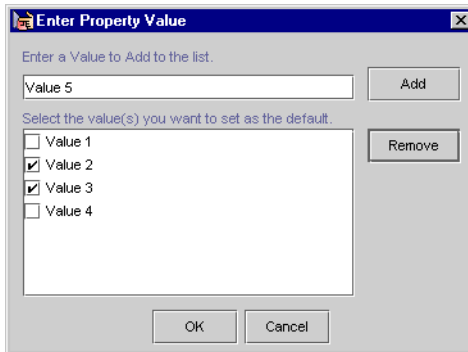
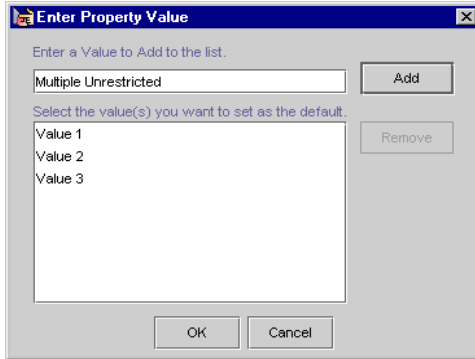


Figure 7-8 Enter Property Values—Multiple Values, Multiple Unrestricted Defaults



2. Repeat the previous step until you have entered all values.
3. To select one or more default values, complete one of the following:
 - If you do not want to select a default, go to next numbered step.
 - For multiple values with a single default, select the value (radio button) that you want to set as the default, and then click the OK button.

Note: To remove the default value for a property with multiple values and a single default, click the Deselect All button.

 - For multiple values with multiple restricted defaults, select the value (check boxes) that you want to set as defaults, and then click the OK button.

Note: For multiple values without restrictions (that is, the Value range is Unrestricted), you do not need to select any defaults.
4. In the Edit Event Property window, click the OK button.

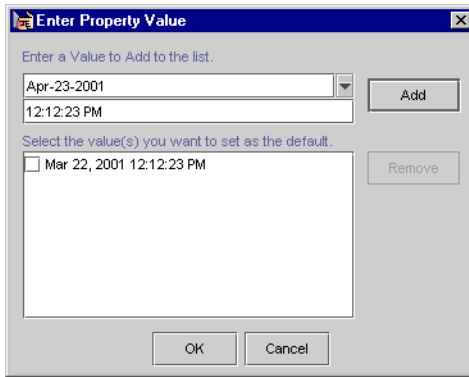
Properties with Date and Time Values

Properties with date and time values can use all Selection mode and Value range settings. For more information about these settings, see “Properties with Boolean or a Single Value and Single Default” and “Properties with Multiple Values and Single, Multiple, or All Defaults.”

To enter date and time values and set one or more defaults, complete the following steps:

1. In the Enter Property Values window shown in Figure 7-9, click the drop-down arrow in the Date list. A calendar appears.

Figure 7-9 Enter Date/Time Values



2. Select a date from the calendar.
3. In the Time field, enter a time.
4. Click the Add button.
5. To add more dates and times, repeat the first four steps until you have entered all the values.
6. To select one or more default values, complete one of the following:
 - If the event has a single date and time with a single default (restricted), click the OK button.
 - If the event has multiple dates and times with a single default (restricted), select the value (radio button) that you want to set as the default, and then click the OK button.
 - If the event has multiple dates and times with multiple defaults (unrestricted), select the values (check boxes) that you want to set as the default, and then click the OK button.
7. In the Edit Event Property window, click the OK button.

Updating a Registered Custom Event

Whenever you make changes to a custom event's code, you should update that event's registration. Updating the registration lets the E-Business Control Center know about the changes in the custom event and aids campaign developers using the E-Business Control Center to modify any scenario actions that refer to the event.

To update a custom event:

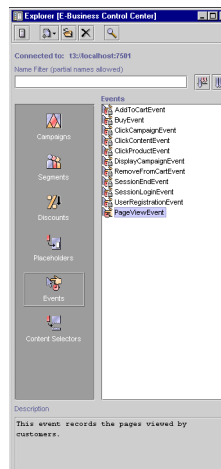
1. Start the E-Business Control Center and connect it to a Web server. The Explorer window opens.

Note: For more information on connecting the E-Business Control Center to a server, see Chapter 2, "Connecting the BEA E-Business Control Center to a Server."

2. In the Explorer window, select the Event icon. A list of events appears in the Events field as shown in Figure 7-10.

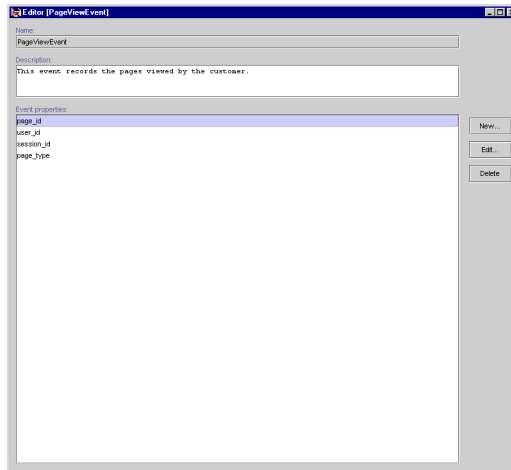
Note: You cannot edit standard events.

Figure 7-10 Explorer Window



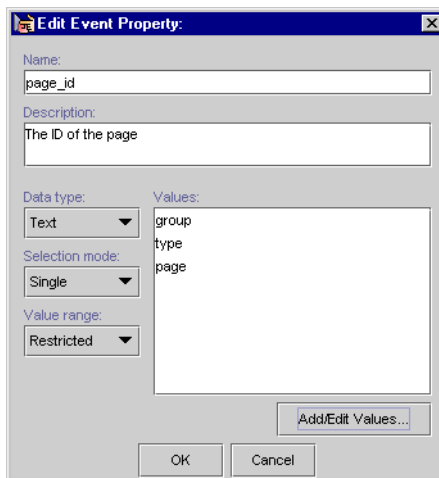
3. Double-click the custom event that you wish to edit. The Event Editor window opens as shown in Figure 7-11. The Event properties field displays a list of existing properties.

Figure 7-11 Event Editor Window



- In the Event properties field, select the property that you want to edit.
 - Note:** For more information about setting custom event properties, see “Entering Property Values and Setting the Default Value” on page 7-11.
- Click the Edit button. The Edit Event Editor window opens as shown in Figure 7-12.

Figure 7-12 Edit Event Property Window

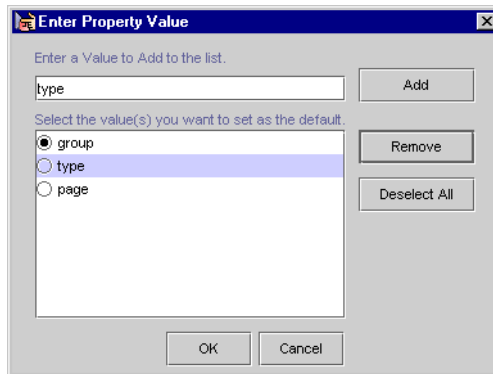


- To change the Data type, Selection mode, or Value range, select a setting from the appropriate list box.

Note: If you change the property setting Data type, Selection mode, or Value range, the associated values will be erased.

- To add or change values, click the Add/Edit values button. The Enter Property Value window opens as shown in Figure 7-13.

Figure 7-13 Enter Property Value Window



- To remove a value, select the value, and then click the Remove button.
 - To add a value, enter the value, and then click the Add button.
 - To change a value, select the value, remove it, and then add the new value.
 - If required, select the default value or values.
 - To remove the default value for a property with multiple values and a single default, click the Deselect All button.
 - Click the OK button. The Enter Property Value window closes.
- After you have finished updating the properties or values for the event, click the OK button in the Edit Event Property window.

8 Defining Stand-Alone or Campaign Discounts

This topic contains basic information about discounts as they are used in the BEA E-Business Control Center. This information includes a conceptual description of a discount, an explanation about how you might want to use discounts, and step-by-step instructions for defining a new discount or modifying existing discounts within the E-Business Control Center.

This topic includes the following sections:

- What Is a Discount?
- Uses of Discounts
 - Using Discounts as Stand-Alone Discounts
 - Using Discounts in Promotional Campaigns
- About Discount Definitions
 - Discount Types
 - Discount Limits
 - Discount Priorities
- Defining a New Discount
 - Specify General Discount Information
 - Establish the Discount Duration and Overall Limit
 - Specify Discount Terms
 - Save and Deploy the Discount

- Locating an Existing Discount
- Modifying an Existing Discount
 - Deactivating and Reactivating Discounts
- Deleting an Existing Discount

What Is a Discount?

As you might expect, a **discount** is a reduction in the price charged for a product item, an order, or the shipping cost associated with an order. The E-Business Control Center allows you to define the discounts that you might later decide to offer to your online customers.

Uses of Discounts

This section is intended to provide you with an overview of how you can use discounts once you define them. Since there are two ways to use discounts, this section contains the following subsections:

- Using Discounts as Stand-Alone Discounts
- Using Discounts in Promotional Campaigns

Note: If your product license is for the BEA WebLogic Personalization Server only, discounts will not be available to you in E-Business Control Center. Depending upon whether you have the BEA WebLogic Commerce Server version or the BEA Campaign Manager for WebLogic version of the E-Business Control Center, you may be able to use discounts in one or both of the ways described in this section. For more information about the different versions of the E-Business Control Center that are packaged with the Campaign Manager for WebLogic, the WebLogic Commerce Server, and the

WebLogic Personalization Server, see “About the E-Business Control Center” on page 1-2 or the *Product Family Overview* documentation at <http://edocs.bea.com/wlcs/docs35/index.htm>.

Using Discounts as Stand-Alone Discounts

Stand-alone discounts are discounts that are not based on a customer’s behavior or controlled by campaigns. Rather, stand-alone discounts are offered to everyone shopping at your Web site and as such, are available in all versions of the E-Business Control Center. An example of a discount used as a stand-alone discount would be, “give everyone 10% off books.”

As you are defining a stand-alone discount, you may want to provide a discount explanation and a discount description. A discount explanation identifies the discount to your customers while they are checking out, or at some other time during their shopping experience. A discount description will help you identify the discount when you are trying to distinguish it from others listed in the E-Business Control Center.

Using Discounts in Promotional Campaigns

As their name implies, **campaign discounts** are discounts that are intended to be used within campaigns and awarded to specific customers under certain conditions, such as membership in a customer segment, a specific customer behavior, and so on. An example of a discount used in a promotional campaign would be, “if a Gold Customer clicks the Take-Advantage-of-This-Special-Offer ad banner, give them a 20% discount off books.” Discounts can be incorporated into your promotional campaigns like ads and e-mails (as actions), and used in conjunction with these promotional messages to entice customers.

Since one predefined campaign discount can be applied within multiple campaigns, campaign discounts can have multiple discount explanations. A discount explanation identifies the discount to your customers while they are checking out, or at some other time during their shopping experience. Having multiple discount explanations allows you to tailor the text to the specific application of the discount. For campaign discounts, you supply the discount explanation as you are creating the discount scenario action (rather than during the discount definition, as is the case with stand-alone discounts).

As with stand-alone discounts, a discount description helps you identify the discount when you are trying to distinguish it from others listed in the E-Business Control Center.

Note: If you have the version of the E-Business Control Center that comes with the Campaign Manager for WebLogic and want detailed information about how to use discounts within promotional campaigns, see the “Add Scenarios to the Campaign” section in the *Working With Campaigns* documentation.

About Discount Definitions

Regardless of how you intend to use discounts, you need to define discounts using the E-Business Control Center to make them meaningful for your marketing efforts. In addition to the discount usage (stand-alone or campaign), discount definitions also include the following information:

- Discount Duration
- Discount Types
- Discount Limits
- Discount Priorities

Discount Duration

The discount duration is simply the start date and time for the discount (that is, the date/time in which the discount will begin to be offered to customers) and the stop date and time for the discount (that is, the date/time in which the discount will no longer be offered).

Warning: If you have the version of the E-Business Control Center that comes with the Campaign Manager for WebLogic and plan to use the discounts you define within campaigns, keep in mind that if the discount expires before the campaign has ended, the discount may not be awarded at check out time. Stop/start dates on discounts and campaigns are completely independent, and using a discount within a campaign does not cause the

discount to inherit the campaign's scheduled dates, or visa versa. BEA recommends that you closely monitor the schedules of these objects when assembling campaigns.

Discount Types

The E-Business Control Center allows you to define your discount offerings by choosing from three discount types. To take advantage of the E-Business Control Center's discount service, you need to decide which discount type to use, identify the items that cause the discount to be offered (called **trigger items**), the items to which the discount should be applied (called **target items**), and consider the **discount value** (the percentage or dollar amount of the discount) that you may be required to supply for that discount type. The three discount types available for use and discussed in this section are:

- Per Item Discounts
- Set-Based Discounts
- Order Discounts

Per Item Discounts

Per item discounts are discounts that apply to individual items in your product catalog. Per item discounts can be offered to customers (that is, triggered) based on a customer's purchase of:

- Any item (regardless of SKU or product category).
- Specific items in the product catalog (specified by a SKU).
- Any items belonging to a particular product category.
- A combination of items specified by SKU and product category.

Per item discounts can apply to (that is, target):

- The same items that triggered the discount offer.
- Any items in the product catalog (regardless of SKU or product category).
- Specific items specified by SKU or product category.

8 Defining Stand-Alone or Campaign Discounts

As their name implies, per item discounts will be applied per item. For example, you may specify that for every item purchased from the product category Sports Equipment, customers will receive \$5 off a baseball cap. When customers purchase baseball, a glove, and a bat (all items belonging to the Sporting Equipment category), customers can receive \$5 off three baseball caps, for a total discount of \$15.

Per item discounts are specified as a percentage off, an amount off, or a fixed price. Table 8-1 lists some possible per item discounts.

Table 8-1 Per Item Discount Examples

Discount	Examples
Percentage off any item.	Take 10% off the price of any item in the product catalog.
Fixed amount off any item.	Take \$5 off the price of any item in the product catalog.
Fixed price for any item.	All items cost \$10.
Percentage off each specified item.	Take 10% off the price of each item with SKU 12345.
Fixed amount off each specified item.	Take \$5 off each item with SKU 12345.
Fixed price for each specified item.	Each item with SKU 12345 costs \$10.
Percentage off each item belonging to a specified product category.	Take 10% off the price of each item in the Books product category.
Fixed amount off each item belonging to a specified product category.	Take \$5 off the price of each item in the Books product category.
Fixed price for each item belonging to a specified product category.	Each item in the Books product category costs \$10.

If you would like to examine other, more complex examples about how per item discount definitions affect customer orders, see Chapter 9, “Discount Examples.”

Warning: If you want to specify individual product items by SKU, be certain that you have the correct SKU number from your product catalog, and that you enter the SKU carefully. If you are specifying discounts on items within a given product category, be certain that you have the correct category name and that you enter this category carefully. Additionally, be sure that the items you want to discount are actually members of the product category. You may need to coordinate with the person(s) responsible for

maintaining your product catalog. Failure to do so could result in discounts that are associated with incorrect product items or categories.

As these examples show, you should be very careful when specifying fixed price discounts.

Set-Based Discounts

Set-based discounts are useful when you want to offer a single discount based on the customer having a specified set of product items in their shopping cart. Set-based discounts can be offered to customers (that is, triggered) based on a customer's purchase of:

- Sets of any item (regardless of SKU or product category).
- Sets of specific items in your product catalog (specified by SKU).
- Sets of product items belonging to a particular category.
- Sets created by a combination of product items specified by SKU and product categories.

Set-based discounts can apply to (that is, target):

- The same items that triggered the discount offer.
- Any items in the product catalog (regardless of SKU or product category).
- Specific items specified by SKU or product category.

As their name implies, set-based discounts will be applied per set. For example, you may specify that for every set of three items purchased from the product category Sporting Equipment, customers will receive \$5 off a baseball cap. When customers purchase a baseball, a glove, and a bat (all items belonging to the Sporting Equipment category), customers can receive \$5 off one baseball cap, for a total discount of \$5.

Set-based discounts are also specified as a percentage off, an amount off, or a fixed price.

Note: Under set-based discounts, if the target items are the same as the trigger items, and you specify a fixed amount off or a fixed price discount, then the discount will be applied to each item in the set, rather than the set as a whole.

Table 8-2 lists some possible set-based discounts.

Table 8-2 Set-Based Discount Examples

Discount	Examples
Percentage off a specified set of any items.	Take 10% off the price of any set of 3 items.
Fixed amount off a specified set of any items.	Take \$5 off the price of any set of 3 items.
Fixed price for a specified set of any items.	Each set of 3 items costs \$10.
Percentage off a specified set of specified items.	Take 10% off the price of each set of 3 items with SKU 12345.
Fixed amount off each set of specified items.	Take \$5 off each set of 3 items with SKU 12345.
Fixed price for a set of specified items.	Each set of 3 items with SKU 12345 costs \$10.
Percentage off a specified set of items belonging to a specified product category.	Take 10% off the price of each set of 3 items in the Books product category.
Fixed amount off each set of items belonging to a specified product category.	Take \$5 off the price of each set of 3 items in the Books product category.
Fixed price for each set of items belonging to a specified product category.	Each set of 3 items in the Books product category costs \$10.

If you would like to examine other, more complex examples about how set-based discount definitions affect customer orders, see Chapter 9, “Discount Examples.”

Warning: Again, if you want to specify individual product items by SKU, be certain that you have the correct SKU number from your product catalog, and that you enter the SKU carefully. If you are specifying discounts on items within a given product category, be certain that you have the correct category name and that you enter this category carefully. Additionally, be sure that the items you want to discount are actually members of the product category. You may need to coordinate with the person(s) responsible for maintaining your product catalog. Failure to do so could result in discounts that are associated with incorrect product items or categories.

As these examples show, you should be very careful when specifying fixed price discounts.

Order Discounts

Order discounts are discounts that can apply to a customer's entire order. Order discounts can be offered to customers (that is, triggered) based on:

- Any order.
- A specified order subtotal.

Order discounts can apply to (that is, target):

- The order total.
- The shipping cost of the order.

Note: For order discounts, there can be only one target. In other words, you can apply the order discount to *either* the order total *or* the shipping cost.

As their name implies, order discounts will be applied per order. For example, you may specify that a \$5 order discount should apply to orders with subtotals greater than \$100. When customers place orders with subtotals that are greater than \$100, customers will receive \$5 off their order, for a total discount of \$5.

Order discounts are also specified as a percentage off, an amount off, or a fixed price. Table 8-3 lists some possible order discounts.

Table 8-3 Order Discount Examples

Discount	Examples
Percentage off any order.	Take 10% off any customer's order total.
Fixed amount off any order.	Take \$5 off any customer's order total.
Fixed price for any order.	All orders cost \$50.
Percentage off orders with subtotals that meet specified criteria.	Take 10% off the order total if the subtotal is greater than \$100.
Fixed amount off orders with subtotals that meet specified criteria.	Take \$5 off the order totals if the subtotal is greater than \$100.
Fixed price for orders with subtotals that meet specified criteria.	Orders with subtotals that are greater than or equal to \$100 cost \$100.

Warning: As these examples show, you should be very careful when specifying fixed price discounts.

Discount Limits

The E-Business Control Center provides you with several ways to limit the application of discounts as you are defining them. This section describes the following discount limitations:

- Overall Limit
- Order Limit
- Minimum Purchase Requirement

Overall Limit

An **overall limit** is a limit on the number of orders to which the discount can be applied for a given customer. The overall limit can be a value equal to or greater than 1.

Say your store offers a 10% discount off books with an overall limit of 2. This means that customers can receive the 10% discount for no more than 2 orders containing books. If there were no overall limit, customers could return to the Web site and place separate orders to receive more discounts.

Order Limit

As their name implies, **order limits** limit how many times the discount can be used per order. You can specify order limits based on the items that triggered the discount, or on the target items to which the discount is applied (which may or may not be the same items). For example, you may want to give away 2 DVD movies with the purchase of every DVD player you sell, with a limit of one giveaway per order. In this case, you would impose the order limit of 1 on the trigger item, the single DVD player. Any additional DVD players in the order would not trigger additional discounts; the customer would receive only 2 DVD movies free.

Limitations on the items that trigger the discount can be specified as:

- A value equal to or greater than 1.

- No limit.

Note: Order limits on items that trigger discounts are specified in different places in the E-Business Control Center, depending on whether you are working with a per item discount or a set-based discount. This is because per item order limits apply to each individual item that triggered the discount, while set-based order limits apply to a set of items that triggered the discount.

Limitations on the target items to which the discount is applied can be specified as:

- Up to N items (or sets).
- Exactly N items (or sets).

where N is a value equal to or greater than 1.

Note: For more information about discount types, see “Discount Types” on page 8-5.

Minimum Purchase Requirement

For per-item discounts, you can use the E-Business Control Center to specify a minimum purchase requirement. The minimum purchase requirement can be a value equal to or greater than 1. Once the minimum requirement has been met in a given order, the discount will be earned for each item. For example, if the minimum purchase requirement is 3 items, customers who buy 5 items will receive 5 discounts.

Note: Minimum purchase requirements do not apply to other discount types. For more information about discount types, see “Discount Types” on page 8-5.

Discount Priorities

A **discount priority** is a setting within the E-Business Control Center that allows you to specify the relative importance of a discount. The discount priority is a value in the range of 1-20, with 1 being the highest priority. In the event that two or more discounts are applicable to a given item, the priority associated with each discount helps resolve the conflict by indicating the discount to be applied. (Although no more than one discount can be applied to a given item, the remaining discounts may still be eligible for application.) This process also applies to discounts on entire orders. Therefore, you should consider the priority with which each discount will be assigned during discount definition time.

Note: If two or more discounts have the same priority, the order in which the discounts are applied is random. Be sure to follow your organization’s established policy for assigning discount priorities if you wish to avoid this situation.

Defining a New Discount

Initially, you will probably want to spend some time defining new discounts for use in the E-Business Control Center. This section provides step-by-step instructions you can follow to accomplish this task. If you have already defined discounts and need to edit them, see “Modifying an Existing Discount” on page 8-31.

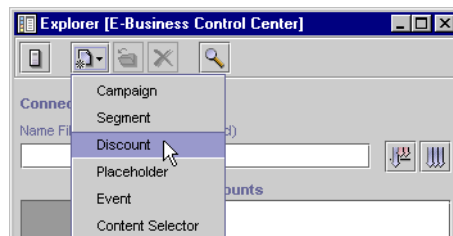
Note: Before you can define a new discount, you must connect the E-Business Control Center to a server. For more information on connecting to a server, see “Connecting the BEA E-Business Control Center to a Server” on page 2-1.

To define a new discount, follow these steps:

1. From the BEA E-Business Control Center File menu, select New → Discount. The Discount Editor window appears.

Tip: You can also click the New icon in the Explorer window and then select Discount to open the Discount Editor window, as shown in Figure 8-1.

Figure 8-1 New Icon, Discount Selection



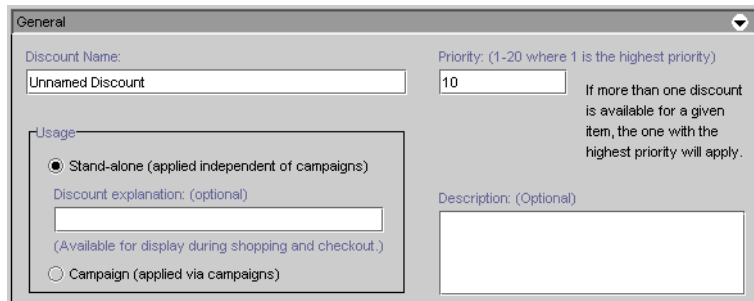
2. In the Discount Editor window, you can now follow the steps provided in the following sections to:
 - Specify General Discount Information

- Establish the Discount Duration and Overall Limit
- Specify Discount Terms
- Save and Deploy the Discount

Specify General Discount Information

1. Click the upward facing arrow, shown on far right side of the General bar. The General bar opens and the arrow faces downward, as shown in Figure 8-2.

Figure 8-2 General Pane



2. Enter a unique and descriptive name in the Discount Name field. The name you enter also appears at the top of the Discount Editor window.
3. Select a discount usage option by clicking Stand-Alone or Campaign.

Note: If you do not have the Campaign Manager for WebLogic version of the E-Business Control Center, you will not be provided with this option. By default, the discount usage will be Stand-Alone, so just continue to step 4. For an explanation of the different discount usages, see “Uses of Discounts” on page 8-2.
4. If you selected the Stand-Alone usage in step 3, you may want to provide a discount explanation. This text may be displayed to customers receiving the discount, if your technical staff chooses to use it.
5. Specify the priority for the discount by entering a number in the Priority field.

- Note:** A priority of 1 is the highest priority you can assign to a discount. For more information about how discount priorities are used, see “Discount Priorities” on page 8-11.
6. You may want to provide a description of the discount in the Description text area. This description can be useful for future identification of the discount in the E-Business Control Center.
 7. If you like, click the downward facing arrow on the General bar to close the General bar.

Establish the Discount Duration and Overall Limit

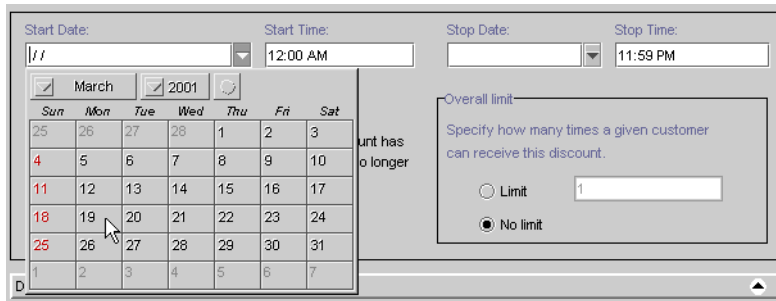
1. Click the upward facing arrow, shown on far right side of the Start/Stop bar. The Start/Stop bar opens and the arrow faces downward, as shown in Figure 8-3.

Figure 8-3 Start/Stop Pane

The screenshot shows a window titled "Start/Stop" with a downward-pointing arrow on the right. Inside the window, there are four input fields: "Start Date:" (with a dropdown arrow), "Start Time:" (containing "12:00 AM"), "Stop Date:" (with a dropdown arrow), and "Stop Time:" (containing "11:59 PM"). Below these fields are two checkboxes: "Deploy this discount" and "Deactivate this discount". A note below the checkboxes reads: "Note: Select the Deploy option only after the discount has been finalized. Once deployed the discount can no longer be modified." To the right of the checkboxes is an "Overall limit" section with the text "Specify how many times a given customer can receive this discount." and two radio buttons: "Limit" (selected) and "No limit". A text input field next to "Limit" contains the number "1".

2. Enter a start date, start time, stop date, and stop time for your discount in the fields provided.
- Tip:** For the start and stop date, you can either type in the date, or click the drop-down list to select the date from a calendar, as shown in Figure 8-4. Just click a date to select it.

Figure 8-4 Start/Stop Date Calendar



3. Specify the overall limit for the discount by selecting either Limit (and entering a limit value) or by selecting No Limit.

Note: Recall that the overall limit is a limit on the number of orders to which the discount can be applied.

4. If you like, click the downward facing arrow on the Start/Stop bar to close the Start/Stop bar.

Note: You may use the Deploy This Discount and Deactivate This Discount check boxes at a later time. For now, just skip over these options.

Specify Discount Terms

1. Click the upward facing arrow, shown on the far right side of the Discount Terms bar. The Discount Terms bar opens and the arrow faces downward, as shown in Figure 8-5.

Figure 8-5 Discount Terms Pane

Discount Terms

Choose a discount type, then select lines in the terms box for editing.

Per Item Discount

Set-based Discount

Limit discount(s) per order

No limit

Order Discount

Discount terms:

For each matching TRIGGER item
apply a DISCOUNT
to one or more TARGET items.

Add a Trigger...

Add a Discount...

Add a Target...

Edit...

Delete

2. Select from the Per Item, Set-based, or Order discount types.

Warning: After you select a discount type, you cannot switch to a different type without losing your discount terms. Be sure to select the correct discount type. For more information about the available discount types, see “Discount Types” on page 8-5.

3. Depending on the discount type you selected in step 2, follow the steps described in:
 - Per Item Discounts
 - Set-Based Discounts
 - Order Discounts

Per Item Discounts

If you selected the Per Item discount type, follow these steps to provide the specifics of the discount:

1. Click Add a Trigger. The Specify Trigger Items window appears, as shown in Figure 8-6.

Figure 8-6 Specify Trigger Items Window

Specify Trigger Items

Offer the discount if ANY of the following items are in the shopping cart.

Any items (regardless of SKU or product category)

Specific items (identified by SKU or product category)

SKU is equal to Add

Remove

Limitations

Limit discount(s) per order Minimum purchase requirement:

No limit

OK Cancel

2. Select a discount trigger option. You may decide that Any Items or Specific Items trigger the discount.

For example, if you select the Any Items option, customers having *any* product items in their shopping cart (regardless of what these items are) would qualify for the discount. If you select the Specific Items option, customers having only the items you specify (by SKU number or product category) in their shopping cart would qualify for the discount.

3. If you selected Specific Items in step 2, you must specify which items trigger the discount. Select SKU or Category, as appropriate, from the drop-down list, then carefully enter the SKU or category from your product catalog into the corresponding field. Click Add. The trigger items you specify appear in the text area below. Repeat this process for each item you want to use as a trigger item.

Note: If you specify more than one trigger item in the Specify Trigger Items window (by SKU or category), this means that *any* of the items you specify must be present in a customer's shopping cart in order for the customer to qualify for the discount. (In other words, multiple trigger items—those shown on the same line in the Discount Terms list—are treated as alternates.)

8 Defining Stand-Alone or Campaign Discounts

Warning: Be sure you obtain the exact SKU or product category from those who maintain your product catalog and enter them correctly. You do not want to offer the discount for the wrong item.

- Specify the order limit for the discount by selecting either Limit (and entering a limit value) or by selecting No Limit.

Note: The order limit specifies how many times per order the discount can be applied.

- If desired, change the value in the Minimum Purchase Requirement field from 1 to another numeric value.

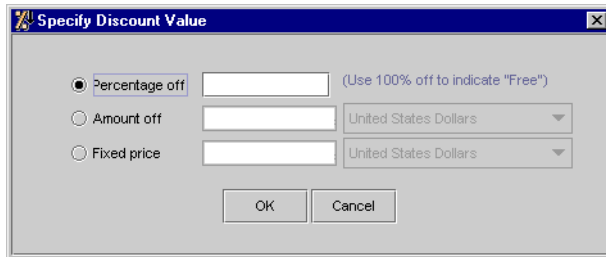
Note: The order limit must be greater than or equal to the minimum purchase requirement.

- Click OK. The Specify Trigger Items window closes, and the first phrase shown in the Discount Terms list changes to reflect your choices.

Note: If desired, you can repeat steps 1 through 6 to specify additional triggers. If you do specify additional triggers, this means that *each* item must be present in a customer's shopping cart for the customer to qualify for the discount. (In other words, multiple triggers—those shown on separate lines in the Discount Terms list—are all required.)

- Click Add a Discount. The Specify Discount Value window opens, as shown in Figure 8-7.

Figure 8-7 Specify Discount Value Window



- Select a discount value. You may decide that the discount is a Percentage Off, Amount Off, or Fixed Price. Enter the percent, amount, or price of the item in the corresponding field.

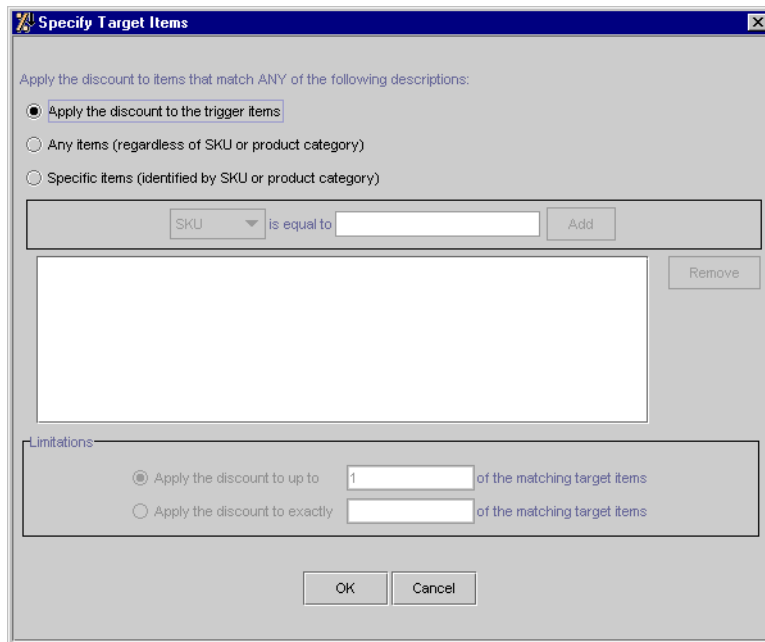
Note: You do not need to type the % or currency symbols into the fields. For the Amount Off or Fixed Price field, select the same currency type that you use for the items in your catalog and for shipping charges.

Tip: To indicate that an item should be given away as free, choose Percentage Off and specify 100.

9. Click OK. The Specify Discount Value window closes, and the second phrase shown in the Discount Terms list changes to reflect your choices.

10. Click Add a Target. The Specify Target Items window opens, as shown in Figure 8-8.

Figure 8-8 Specify Target Items Window



11. Select whether you want the discount to target the same items that triggered the discount (specified in steps 2 and 3), to any items, or to specific items.

12. If you selected Specific Items in step 11, you must specify the items to which the discount will apply. Select SKU or Category, as appropriate, from the drop-down list, then carefully enter the SKU or category from your product catalog into the corresponding field. Click Add. The target items you specify appear in the text area below. Repeat this process for each item you want to use as a target item.

Note: If you specify more than one target item in the Specify Target Items window (by SKU or category), this means that *any* of the items you specify that are present in a customer's shopping cart will be discounted. (In other words, multiple target items—those shown on the same line in the Discount Terms list—are treated as alternates.)

Warning: Be sure you obtain the exact SKU or product category from those who maintain your product catalog and enter them correctly. You do not want to offer the discount for the wrong item.

Note: If you make a mistake, click the target item shown in the text area to highlight it, then click Remove.

13. If you selected Any Items or Specific Items in step 11, select a Limitation. You may decide you want to apply the discount to target items *up to* a certain limit, or to *exactly* some number of target items. For either option, provide a numeric value in the appropriate field.

14. Click OK. The Specify Target Items window closes, and the third phrase shown in the Discount Terms list changes to reflect your choices.

Note: If desired, you can repeat steps 10 through 14 to specify additional targets. If you do specify additional targets, this means that *each* item present in a customer's shopping cart will be discounted. (In other words, multiple targets -- those shown on separate lines in the Discount Terms list -- are all required.)

15. If you like, click the downward facing arrow on the Discount Terms bar to close the Discount Terms bar.

Set-Based Discounts

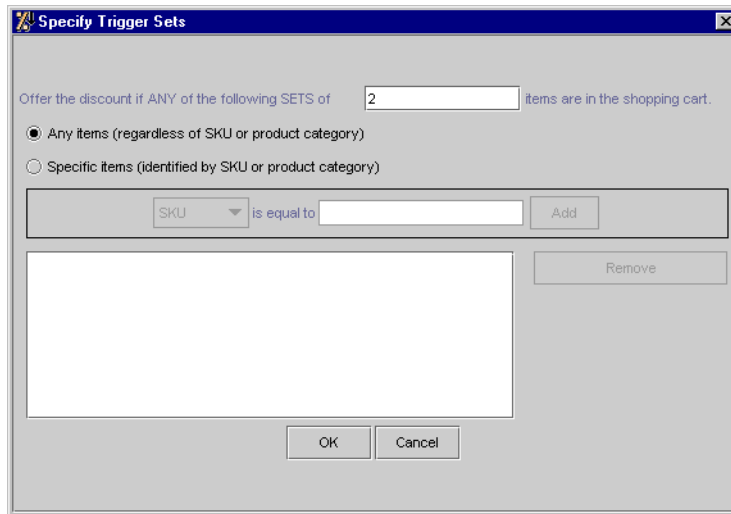
If you selected the set-based discount type, follow these steps to provide the specifics of the discount:

1. Specify the order limit for the discount by selecting either Limit (and entering a limit value into the field) or by selecting No Limit.

Note: The order limit specifies how many times per order a set of trigger items can be used to qualify for the discount.

2. Click Add a Trigger. The Specify Trigger Sets window appears, as shown in Figure 8-9.

Figure 8-9 Specify Trigger Sets Window



3. Enter the number of items that will constitute a set into the field. This is the number of items that must be purchased to qualify for the discount.
4. Specify how the discount is triggered. You may decide to trigger the discount based on sets of any items or sets of specific items.
5. If you selected Specific Items in step 4, you must indicate which items will trigger the discount. Select SKU or Category, as appropriate, from the drop-down list, then carefully enter the SKU or category from your product catalog into the corresponding field. Click Add. The trigger items you specify appear in the text area below. Repeat this process for each item you want to use as a trigger item.

Note: If you specify more than one trigger item in the Specify Trigger Items window (by SKU or category), this means that *any* of the items you specify must be present in a customer's shopping cart in order for the customer to qualify for the discount. (In other words, multiple trigger items -- those

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shown on the same line in the Discount Terms list -- are treated as alternates.)

Warning: Be sure you obtain the exact SKU or product category from those who maintain your product catalog and enter them correctly. You do not want to trigger the discount incorrectly.

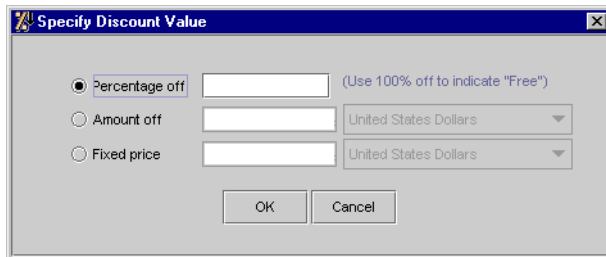
Note: If you make a mistake, click the trigger item shown in the text area to highlight it, then click Remove.

6. Click OK. The Specify Trigger Sets window closes, and the first phrase shown in the Discount Terms list changes to reflect your choices.

Note: If desired, you can repeat steps 2 through 6 to specify additional triggers. If you do specify additional triggers, this means that *each* item must be present in a customer's shopping cart for the customer to qualify for the discount. (In other words, multiple triggers—those shown on separate lines in the Discount Terms list—are all required.)

7. Click Add a Discount. The Specify Discount Value window opens, as shown in Figure 8-10.

Figure 8-10 Specify Discount Value Window



8. Select a discount value. You may decide that the discount is a Percentage Off, Amount Off, or Fixed Price. Enter the percent, amount, or price of the item in the corresponding field.

Note: You do not need to type the % or currency symbols into the fields. For the Amount Off or Fixed Price field, select the same currency type that you use for the items in your catalog and for shipping charges.

Tip: To indicate that an item should be given away as free, choose Percentage Off and specify 100.

9. Click OK. The Specify Discount Value window closes, and the second phrase shown in the Discount Terms list changes to reflect your choices.
10. Click Add a Target. The Specify Target Items window opens, as shown in Figure 8-11.

Figure 8-11 Specify Target Items Window

11. Select whether you want the discount to target the same items that triggered the discount (as specified in steps 4 and 5), to any items, or to specific items.
12. If you selected Specific Items in step 11, you must specify the items to which the discount will apply. Select SKU or Category, as appropriate, from the drop-down list, then carefully enter the SKU or category from your product catalog in the corresponding field. Click Add. The target items you specify appear in the text area below. Repeat this process for each item you want to use as a target item.

Note: If you specify more than one target item in the Specify Target Items window (by SKU or category), this means that *any* of the items you specify that are present in a customer's shopping cart will be discounted. (In other

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words, multiple target items—those shown on the same line in the Discount Terms list—are treated as alternates.)

Warning: Be sure you obtain the exact SKU or product category from those who maintain your product catalog and enter them correctly. You do not want to target the discount incorrectly.

Note: If you make a mistake, click the target item shown in the text area to highlight it, then click Remove.

13. If you selected Any Items or Specific Items in step 11, select a Limitation. You may decide you want to apply the discount to target product items *up to* a certain limit, or to *exactly* some number of target items. For either option, provide a numeric value in the appropriate field.

14. Click OK. The Specify Target Items window closes, and the third phrase shown in the Discount Terms list changes to reflect your choices.

Note: If desired, you can repeat steps 10 through 14 to specify additional targets. If you do specify additional targets, this means that *each* item present in a customer's shopping cart will be discounted. (In other words, multiple targets—those shown on separate lines in the Discount Terms list—are all required.)

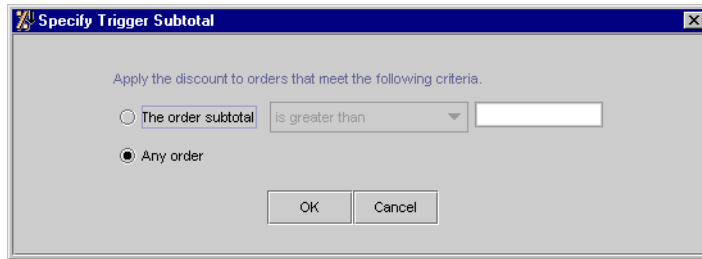
15. If you like, click the downward facing arrow on the Discount Terms bar to close the Discount Terms bar.

Order Discounts

If you selected the Order discount type, follow these steps to provide the specifics of the discount:

1. Click Add a Trigger. The Specify Trigger Subtotal window appears, as shown in Figure 8-12.

Figure 8-12 Specify Trigger Subtotal Window

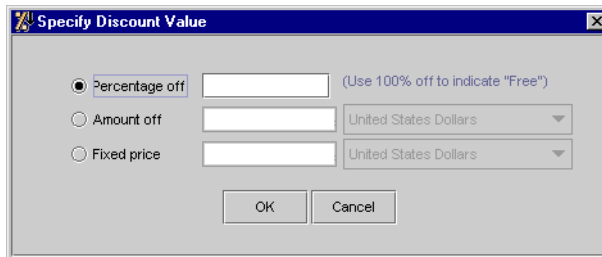


2. Specify that the discount should triggered when an order subtotal meets a certain criteria, or that the discount should apply to any order. If you select Order Subtotal, use the drop-down list and corresponding field to specify the comparison and subtotal value.

Note: You do not need to type the \$ symbol into the field.

3. Click OK. The Specify Trigger Subtotal window closes, and the first phrase shown in the Discount Terms list changes to reflect your choices.
4. Click Add a Discount. The Specify Discount Value window opens, as shown in Figure 8-13.

Figure 8-13 Specify Discount Value Window



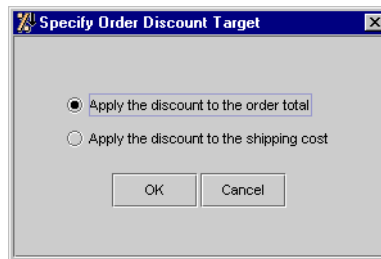
5. Select a discount value. You may decide that the discount is a Percentage Off, Amount Off, or Fixed Price. Enter the percent, amount, or price of the item in the corresponding field.

Note: You do not need to type the % or currency symbols into the fields. For the Amount Off or Fixed Price field, select the same currency type that you use for the items in your catalog and for shipping charges.

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- Tip:** To indicate that an item should be given away as free, choose Percentage Off and specify 100.
6. Click OK. The Specify Discount Value window closes, and the second phrase shown in the Discount Terms list changes to reflect your choices.
 7. Click Add a Target. The Specify Order Discount Target window opens, as shown in Figure 8-14.

Figure 8-14 Specify Order Discount Target Window



8. Select an option to apply the discount to either the order total or to the shipping cost.
9. Click OK. The Specify Order Discount Target window closes, and the third phrase shown in the Discount Terms list changes to reflect your choices.
10. If you like, click the downward facing arrow on the Discount Terms bar to close the Discount Terms bar.


Save and Deploy the Discount

1. After reading “Saving Versus Deploying Discounts,” re-open the Start/Stop pane and check the Deploy This Discount box if desired.

Warning: Do not check the Deploy This Discount box unless you are absolutely positive that the discount you are defining will be exactly as you want it. After discount definitions are deployed, modifications to the discount are extremely restrictive. (See “Modifying an Existing Discount” on page 8-31 for more information about the items you will be permitted to change after deploying the discount.) Remember, you

can always return to the Start/Stop pane and deploy the discount at another time.

2. From the E-Business Control Center File menu, select Save to save your discount.

Tip: You can also click the Save icon () shown on the BEA E-Business Control Center toolbar to save the discount.

The name of the new discount appears in the Discounts list of the Explorer window, as shown in Figure 8-15.


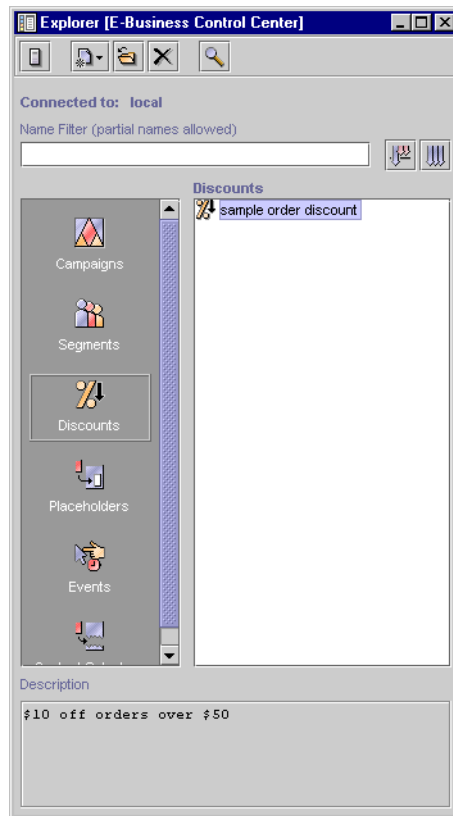
Note: If you do not see the discounts, click  in the Explorer window to enable the Discounts view.

Figure 8-15 Explorer Window: Discounts View



Now, single-clicking the discount name will cause its description to appear at the bottom of the Explorer window.

Tip: Holding the mouse over the discount name will also show you the discount description.

Saving Versus Deploying Discounts

The E-Business Control Center allows you to save the discounts you define like any other software program (with a File → Save option) so you can access them later. However, deploying discounts is what puts discounts into action on your Web site, causing them to be associated with customer orders.

Note: When deployed and saved, stand-alone discounts are unconditionally offered to customers on your Web site. However, in the case of campaign discounts, deploying and saving discounts means that the discount will be offered only to your customers who meet certain conditions.

Thus, once a discount is deployed, its definition cannot be modified because doing so may affect customers currently in line to receive the discount. As you can see, it is very important that you define your discounts carefully and not deploy discounts until they are 100% correct.

The E-Business Control Center provides you with a Deploy this Discount check box that allows you to specify whether to deploy a given discount. If you check this box, the discount will be deployed the next time you save it, and you will not be able to modify much about discount definition once this is done. If you leave this box unchecked, you will still be able to deploy the discount at a later time.

Note: For more information about modifying discounts after they are deployed, see “Modifying an Existing Discount” on page 8-31.

The only information you need to specify to save a discount is a unique name. To deploy a discount, however, you must be sure to specify each of the following:

- Discount name
- Discount usage (standalone or campaign)
- Discount priority (1-20)
- Overall limit
- Start/stop dates and times
- Discount trigger items
- Discount target items
- Discount value (percent off, amount off, or fixed price)

Locating an Existing Discount

If you have defined many discounts, it can be time consuming to locate a particular discount by simply looking in the Discounts list. Therefore, the E-Business Control Center provides you with a mechanism to filter existing discounts by name.

To locate an existing discount using the name filter, follow these steps:




1. Click  (located on the left side of the Explorer window) to enable the Discounts view. A list of discounts appears in the Discounts list.
2. In the Name Filter field (shown in Figure 8-16), type the name of the discount you want to locate.

Figure 8-16 Name Filter Field



Note: You can type full or partial names into the Name Filter field. Discount names are case sensitive. Therefore, filtering based on the text “Sale” will not locate discounts with names that start with “sale.”

3. Click the Filter icon () to filter the discounts shown in the Discounts list. The discounts that have names beginning with the text you entered appear in the Discounts list.

Note: To return to the full list of discounts, click the Show All Objects icon ().



Modifying an Existing Discount

The E-Business Control Center also allows you to view and modify existing discounts. If a discount has not yet been deployed, you can modify any information about the discount. If the discount has been deployed, you can only modify the following:


- Discount Priority
- Discount Stop Date/Time
- Activation State

Note: For more information about activation state, see “Deactivating and Reactivating Discounts” on page 8-32.

Regardless of whether the discount has been deployed, you will need to open the discount for modification. To open an existing discount for modification, follow these steps:

1. If necessary, switch to the Discounts view by clicking  (located on the left side of the Explorer window) to enable the Discounts view. A list of discounts appears in the Discounts list.
2. Click the name of the discount you want to modify. The discount is highlighted.
Tip: If there is a long list of discount names, you might want to use the name filter to locate the discount you want to modify. For more information about the name filter, see “Locating an Existing Discount” on page 8-30.
3. Click the Open icon () shown on the Explorer toolbar. The Discount Editor opens.
Tip: You can also open the discount by double-clicking on the discount name.
4. If the discount you opened has not yet been deployed, you can modify any part of the discount definition, except for the discount name. Follow the same instructions for defining a new discount, starting from “Specify General Discount Information” on page 8-13.
5. If the discount you opened has already been deployed, follow these steps:

- a. To change the discount priority, click the upward facing arrow shown on the far right side of the General bar. The General bar opens and the arrow faces downward. Enter a new priority.
 - b. To change the discount stop date or time, click the upward facing arrow shown on the far right side of the Start/Stop bar. The Start/Stop bar opens and the arrow faces downward. Enter a new stop date and/or stop time by typing the date/time into the Stop Date/Stop Time fields.
 - c. To change the activation status, click the upward facing arrow shown on the far right side of the Start/Stop bar. The Start/Stop bar opens and the arrow faces downward. Click the Deactivate This Discount check box to deactivate the discount.
- Tip:** For the stop date, you can either type in the date, or click the drop-down list to select the date from a calendar. Just click a date to select it.
- Note:** For more information about deactivating discounts, see “Deactivating and Reactivating Discounts” on page 8-32.
6. Be sure to save your modifications by selecting Save from the BEA E-Business Control Center File menu.

Tip: You can also click the Save icon () shown on the BEA E-Business Control Center toolbar to save the discount.

Warning: If the discount you modify is in use by a promotional campaign, saving modifications to the discount will affect every scenario action that refers to that discount. Be certain that the modifications you make are in line with your organization’s established policies and that you entered the modifications correctly in the E-Business Control Center.

Deactivating and Reactivating Discounts

Once discounts are deployed, they are considered active. In other words, deployed discounts are working on your Web site. If for some reason you want to stop offering a discount, check the Deactivate This Discount check box located in the Start/Stop pane. The next time you save the discount, it will be deactivated. If a customer order was already associated with the discount you just deactivated, the system will still honor the discount. However, no new offers of the discount will be made.

If at any time you want to reactivate a discount, simply return to the Start/Stop pane and click the Deactivate This Discount check box to remove the check mark. Once you save, this will reactivate the discount, allowing it to once again be associated with customer orders.


Note: Deactivating a deployed discount will not release the modifications restrictions placed on deployed discounts.

Deleting an Existing Discount


If there are no pending offers or customer orders associated with a discount, you can also delete existing discounts using the E-Business Control Center.

Warning: BEA recommends that you do not attempt to delete discounts until the discount has expired (that is, the end date associated with the discount is reached) and until any orders associated with the discount have cleared. And, as with any deletion you make, be absolutely certain that you select the correct discount and that you are sure you want to delete it. Deleted discounts cannot be retrieved.

To delete an existing discount, follow these steps:

1. If necessary, switch to the Discounts view by clicking  (located on the left side of the Explorer window) to enable the Discounts view. A list of discounts appears in the Discounts list.

Tip: If there is a long list of discount names, you might want to use the name filter to locate the discount you want to delete. For more information about the name filter, see “Locating an Existing Discount” on page 8-30.

2. Click the name of the discount you want to delete. The discount is highlighted.
3. To delete the discount, click the Delete icon () shown on the Explorer toolbar.

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Note: If the discount you are trying to delete is currently associated with a pending offer or a customer order, a message indicating this will be displayed and you will not be able to delete the discount. This is because the deletion of discounts may cause errors in the system if the discount is still in use.

9 Discount Examples

This topic contains example discounts that are intended to illustrate how different discounts function under different circumstances. The examples cover a range of per item and set-based discounts of varying complexity and forms. They are not meant to be exhaustive in terms of covering all the possible discount combinations, but they cover a few basics and show cases where the semantics may not be immediately obvious. The further down the example is listed in this document, the more complex the example will be.

This topic contains the following sections:

- Per Item Discount Examples
 - A Simple Per Item Discount
 - A Simple Per Item Discount with a Limit
 - A Per Item Discount with a Minimum Purchase Requirement and Limit
 - Using Different Triggers and Targets
 - Discounting More Than One Target Item
 - Discounting an Exact Quantity of Target Items
 - Using Alternate Trigger Items
 - Requiring More Than One Trigger Item
 - Requiring More Than One Trigger (Each with Alternatives), and Having Alternate Targets
 - Using Multiple Required Targets
- Set-Based Discount Examples
 - Buy Two Get One Free
 - Percentage Off Discounting of a Set of Items

- Amount Off Discounting of a Set of Items
- Fixed Price Discounting of a Set of Items
- Using Multiple Trigger Sets
- Using Multiple Trigger Sets, with Quantities of Target Items Greater Than One
- Using Multiple Trigger Sets, with an Exact Quantity of Target Items

Per Item Discount Examples

This subsection contains several examples that help illustrate how per item discounts work. In each example, the discount terms (as they would appear in the Discount Terms pane of the Discount Editor window) are shown, and then one or more situations in which a customer may receive the discount as a result of the discount definition are provided.

A Simple Per Item Discount

For each item where SKU=T123 (no limit)
apply a 15% discount to
each trigger item.

- If a customer has 5 items of SKU equal to T123 in their shopping cart, the customer will receive 15% off each item.

A Simple Per Item Discount with a Limit

For each item where SKU=T123 (limit 3)
apply a 15% discount to
each trigger item.

- If a customer has 5 items of SKU equal to T123 in their shopping cart, the customer will receive 15% off 3 of the items.

A Per Item Discount with a Minimum Purchase Requirement and Limit

For each item where Product Category=DVD (minimum purchase 3, limit 6)
apply a 15% discount to
each trigger item.

- If a customer has 2 items of Product Category equal to DVD in their shopping cart, none of the items will be discounted.
- If a customer has 5 items of Product Category equal to DVD in their shopping cart, the customer will receive 15% off each of the items.
- If a customer has 8 items of Product Category equal to DVD in their shopping cart, the customer will receive 15% off 6 of the items.

Tip: You could use this format as a range to specify tiered discounts. If a customer purchases between 1 and 10 items, you may want to offer the customer a 5% discount. If the customer purchases between 11 and 20 items, you may want to offer the customer a 10% discount, and so on.

Using Different Triggers and Targets

For each item where SKU=T123 (no limit)
apply a 15% discount to
each of up to 1 item(s) where SKU=T444.

- If a customer has 5 items of SKU equal to T123 and 7 items of SKU equal to T444 in their shopping cart, the customer will receive a 15% discount on 5 of the T444 items.

Discounting More Than One Target Item

For each item where SKU=T123 (limit 3)
take \$5 off
each of up to 2 item(s) where SKU=T444.

- If a customer has 5 items of SKU equal to T123 and 9 items of SKU equal to T444 in their shopping cart, the customer will receive \$5 off 6 of the T444 items.

Note: Since there is a limit of 3 on the trigger items, only 3 discounts are earned; each discount earned can apply to 2 of the target items. This comes out to 6 items having their price adjusted.

Discounting an Exact Quantity of Target Items

For each item where SKU=T123 (limit 3)
apply a 5% discount to
each of exactly 2 item(s) where SKU=T444.

- If a customer has 5 items of SKU equal to T123 and 5 items of SKU equal to T444 in their shopping cart, the customer will receive 5% off 4 of the T444 items.

Note: Since there is a limit of 3 on the trigger items, only 3 discounts are earned. Each discount earned must be applied to exactly 2 of the target items. After the first two pairs of T444 are discounted, there is only one item left over, rather than a complete pair; hence the remaining item is not discounted.

Using Alternate Trigger Items

For each item where SKU=T123 or SKU=T456 (no limit)
set a price of \$10 on
each trigger item.

- If a customer has 4 items of SKU equal to T123 in their shopping cart, the customer will receive each of the items for \$10.
- If a customer has 3 items of SKU equal to T456 in their shopping cart, the customer will receive each of the items for \$10.
- If a customer has 2 items of SKU equal to T123 and 5 items of SKU equal to T456 in their shopping cart, the customer will receive each of the items for \$10.

Tip: You might do this when you have items that you want to treat as interchangeable, as far as the discount is concerned.

Requiring More Than One Trigger Item

For each item where Product Category=DVD Player (no limit)
and where SKU=Theater Sound Receiver (no limit)

apply a 50% discount to

each of up to 2 item(s) where Product Category=DVD

- If a customer has 1 DVD player and 5 DVDs in their shopping cart, then the customer will receive no discounts.

Note: A customer must have both the DVD Player *and* the Theater Sound Receiver to qualify for the discount.

- If the customer has 1 DVD player, 1 Theater Sound Receiver, and 5 DVDs in their shopping cart, they will receive 4 of the DVDs at 50% off.

Note: The customer had both the DVD Player *and* the Theater Sound Receiver in their shopping cart, so the customer qualified for two discounts: one for each item. Since each discount can be applied to up to 2 DVDs, 4 of the 5 DVDs in the customer's cart have their prices adjusted to 50% off.

- If the customer has 2 DVD players, 1 Theater Sound Receiver, and 5 DVDs in their shopping cart, the customer will receive all 5 DVDs at 50% off.

Note: Since there was no limit placed on the DVD players, this trigger condition is met if one or more DVD players is purchased, and a discount is earned for each one purchased (with the stipulation that at least one Theater Sound Receiver is also purchased). Therefore, in this example, up to 6 DVDs could have been purchased at 50% off.

Requiring More Than One Trigger (Each with Alternatives), and Having Alternate Targets

For each item where Product Category=DVD Player or Product Category=VCR (no limit)
and where Product Category=Theater Sound Receiver or Product Category=Stereo Receiver or Product Category=Shelf Stereo System (no limit)

apply a 50% discount to

each of up to 2 item(s) where Product Category=DVD or Product Category=Movie (videocassette)

- If the customer has 1 VCR player, 1 Theater Sound Receiver, and 7 movies (on video) in their shopping cart, the customer will receive 4 of the movies at 50% off.
Note: The customer had both the DVD Player *and* the Theater Sound Receiver in their shopping cart, so the customer qualified for two discounts: one for each item. Since each discount can be applied to up to 2 movies, 4 of the 5 videos in your cart have their prices adjusted to 50% off.
- If the customer has 1 VCR player, 1 DVD Player, and 7 movies (on video) in their shopping cart, the customer will receive no discounts.
Note: The customer must have either a DVD player or a VCR, as well as either a Theater Sound Receiver, Stereo Receiver, or Shelf Stereo System, to qualify for the discount. Since the customer had 2 items from the former group, but none from the latter, the customer will not receive any discounts.
- If the customer has 2 DVD Players, a Theater Sound Receiver, a Shelf Stereo System, and 7 DVDs in their shopping cart, the customer will receive all 7 of the DVDs at 50% off. If the customer had purchased 10 DVDs, 8 of them would have been priced at 50% off.

Using Multiple Required Targets

For each item where Product Category="Bicycle Frame" (limit 1)

apply a 25% discount to

each of exactly 2 item(s) where Product Category="Bicycle Tires"
and each of up to 1 item(s) where Product Category="Bicycle Seat"

- If the customer has 1 Bicycle Frame, 2 Bicycle Tires, and 1 Bicycle Seat in their shopping cart, the customer will receive the tires and seat at 25% off.
- If the customer has 1 Bicycle Frame, 1 Bicycle Tires, and 1 Bicycle Seat in their shopping cart, the customer will receive no discount, since the discount must apply to *exactly* 2 tires as well as 1 seat.
- If the customer has 2 Bicycle Frames, 4 Bicycle Tires, and 2 Bicycle Seats in their shopping cart, the customer will receive 2 tires and 1 seat at 25% off.

Note: Since there is a limit of 1 on the the bicycle frames, the discount on the tires and seats can only be earned once per order.

Set-Based Discount Examples

This subsection contains several examples that help illustrate how set-based discounts work. In each example, the discount terms (as they would appear in the Discount Terms pane of the Discount Editor window) are shown, and then one or more situations in which a customer may receive the discount as a result of the discount definition are provided.

Buy Two Get One Free

Note: In this example, assume that the limit is set to 2.

9 Discount Examples

For the set of the following items: a set of 2 items where SKU=T123 apply a 100% discount to each of up to 1 item(s) where SKU=T123

- If the customer has 3 items of SKU equal to T123 in their shopping cart, then the customer will receive one for free.
Note: The same SKU was repeated in the target phrase rather than indicating that the discount be applied to the trigger items. Had the latter option been selected, the set of two trigger items would have been free.
- If the customer has 5 items of SKU equal to T123 in their shopping cart, then the customer will receive 1 for free.
Note: After getting the third item for free, the fourth and fifth items qualified for another discount but there was no additional item to discount. Had there been a sixth item of SKU equal to T123, it would have been free.
- If the customer has 9 items of SKU equal to T123 in their shopping cart, the customer will receive 2 for free.
Note: Since there is a limit of 2, the discount can only be earned twice per order. For set-based discounts, the limit is not displayed in the Discount Terms pane, but above it, near the Set-Based Discount option.

Percentage Off Discounting of a Set of Items

For the set of the following items: a set of 2 items where SKU=T123 apply a 10% discount to each trigger item.

- If the customer has 2 items of SKU equal to T123 in their shopping cart, the customer will receive each item for 10% off.

Amount Off Discounting of a Set of Items

For the set of the following items: a set of 2 items where SKU=T123 take \$10 off each trigger item.

- If the customer has 2 items of SKU equal to T123 in their shopping cart, the customer will receive each item for \$10 off.

Fixed Price Discounting of a Set of Items

For the set of the following items: a set of 2 items where SKU=T123 set a price of \$10 on each trigger item.

- If the customer has 2 items of SKU equal to T123 in their shopping cart, the customer will receive each item for \$10.

Using Multiple Trigger Sets

For the set of the following item(s): a set of 1 items where Product Category=Bicycle Frame and a set of 2 items where Product Category=Bicycle Tires

take \$10 off

each of up to 1 item(s) where Product Category=Bicycle Seat

- If the customer has a bicycle frame, 2 tires, and two seats in their shopping cart, the customer will receive \$10 off one of the seats.

Note: Since the frame and the 2 tires are treated collectively as one set, only one discount has been earned.

Using Multiple Trigger Sets, with Quantities of Target Items Greater Than One

For the set of the following item(s): a set of 1 items where Product Category=Bicycle Frame and a set of 2 items where Product Category=Bicycle Tires

set a price of \$1.00 on

each of up to 5 item(s) where Product Category=Small Decals

- If the customer has a bicycle frame, 2 tires, and 4 small decals in their shopping cart, the customer will receive all 4 decals for \$1.00 each.
Note: Since the frame and the 2 tires are treated collectively as one set, one discount is earned. The discount can be applied to up to 5 small decals.
- If the customer has a bicycle frame, 2 tires, and 7 small decals in their shopping cart, the customer will receive 5 decals for \$1.00 each (and the remaining decals at full price).

Using Multiple Trigger Sets, with an Exact Quantity of Target Items

For the set of the following item(s): a set of 1 items where Product Category=Bicycle Frame
and a set of 2 items where Product Category=Bicycle Tires
set a price of \$1.00 on
each of exactly 5 item(s) where Product Category=Small Decals

- If the customer has a bicycle frame, 2 tires, and 4 small decals in their shopping cart, the customer will receive no discount.
- Note:** Even though one discount has been earned, based on the set of trigger items, it must be applied to exactly 5 small decals.

10 Roadmap for Creating Promotional Campaigns

This topic describes the high-level process or roadmap you should follow when creating a new promotional campaign in the BEA E-Business Control Center. Following this process will help ensure the best possible delivery of targeted information to your online customers, and reduce your risk for errors when using the application. Where relevant, this topic contains references to other documentation that provides step-by-step instructions for executing the tasks described, or to documentation that provides more details about a concept.

This topic contains the following sections:

- Introduction
- Creating Customer Segments
- Defining Discounts
- Designing Scenario Actions
- Authoring Campaign Messages
- Deciding on Campaign and Scenario Scope
- Campaign Maintenance
- Customer Segments in Scenarios and Actions
- Using Scenario Templates

- About Probability-Based Branching
- Extending the Services That Support the E-Business Control Center

Introduction

Most promotional campaigns conceived within your organization will be developed within the context of a strategic marketing objective. For example, you may want to run campaigns aimed at increasing your average order size by employing cross-sell or up-sell tactics. For example, you may want to entice circular saw buyers in your hardware store to add saw blades to their cart before check out.

As you define your overall marketing objective, you will need to answer the following core marketing questions:

- Which group of customers do I want to include in my campaign?
- What is the offer I need to extend to maximize my response?
- How can I most effectively communicate my offer?
- Where on my Web site should this message be conveyed?

The answers these questions relate directly to how you will set up your promotional campaign using the E-Business Control Center, and are thus the focus of the first four sections in this roadmap document. Be sure to review at least these sections in detail before attempting to implement your promotional campaign in the E-Business Control Center.

The remaining sections of this roadmap document are provided to answer other campaign-related questions you may have, to further clarify some concepts, and to offer some recommendations about how to proceed.

Creating Customer Segments

When you have answered the question, “Which group of customers do I want to include in my campaign?”, you will be ready to create one or more customer segments in the E-Business Control Center. If your goal is to entice circular saw buyers in your hardware store to add saw blades to their cart, your customer segment is circular saw buyers.

A **customer segment** is a grouping of customers based on common characteristics from their customer profile, such as product preferences or age. A **customer profile** is a collection of information that is gathered, saved, and updated as customers visit your Web site, or from other offline sources. Customer profiles are unique to each customer and can contain a variety of information, from product preferences to the demographic data customers provide on a form page. Each piece of information stored in a customer’s profile (or any combination of that information) can be used to create a customer segment. For example, you might create a segment called Circular Saw Buyers based on how many saw-related purchases a customer made in the last year, their occupation as a construction worker, and so on.

As part of creating your promotional campaigns, one of the first things you will need to do is to create customer segments. Once you create a customer segment, the customer segment can be reused in any number of campaigns, whenever you feel it is relevant to your campaign objective. And, out-of-the-box, the E-Business Control Center accesses a great deal of customer profile information that you can use to create customer segments.

For More Information

- To learn more about customer profiles and customer segments, or for step-by-step instructions about how to create new customer segments, see Chapter 4, “Using Customer Segments to Target High-Value Markets.”
- For technical information about how a Web site gathers customer profile information, see the *Developing Campaign Infrastructure* documentation at <http://edocs.bea.com/wlcs/docs35/campdev/index.htm>.

Defining Discounts

When you have answered the question, “What is the offer I need to extend to maximize my response?”, you will be ready to define one or more discounts in the E-Business Control Center. If your goal is to entice circular saw buyers in your hardware store to add saw blades to their cart, you might offer them a 50% discount on the saw blades.

To define discounts that are meaningful for your marketing efforts, you will need to consider the following:

Discount Duration

The length of time for which the discount will be offered (start and stop date and time).

Discount Usage

Stand-alone or campaign. Stand-alone discounts are offered to everyone on your Web site, and are not based upon customer behavior or campaigns. Thus, you will generally use campaign discounts, because they are designed specifically for promotional campaigns and are awarded to customers under certain conditions, such as membership in a customer segment.

Discount Types

Per item, set-based, or per order. Per item discounts are discounts that apply to individual items in your product catalog, while set-based discounts are discounts that apply to sets of items in your product catalog. Order discounts are discounts that can apply to a customer’s entire order.

You will also need to identify the items that cause the discount to be offered (called **trigger items**), the items to which the discount should be applied (called **target items**), and consider the **discount value** (the percentage or dollar amount of the discount) that you may be required to supply for that discount type. All discount values can be specified as a percentage off, an amount off, or a fixed price.

Discount Limits

Overall, order, and/or minimum purchase requirement. An overall limit is a limit on the number of orders to which the discount can be applied. Order limits restrict how many times the discount can be received per order, and can be placed on items that trigger the discount, or on items to which the discount

is applied. For per-item discounts, you can also specify a minimum purchase requirement.

Discount Priority

The relative importance of a discount, specified by a value in the range of 1-20 (with 1 being the highest). In the event that two similar discounts apply to a given item, the priority associated with each discount helps resolve the conflict.

The E-Business Control Center does not detect situations in which multiple discounts are assigned the same priority. If two discounts have the same priority, one of the discounts will be selected at random. Be sure to follow your organization's established policy for assigning discount priorities if you wish to avoid this situation.

For More Information

- To learn more about discounts, or for step-by-step instructions about how to define new discounts, see Chapter 8, “Defining Stand-Alone or Campaign Discounts.”
- For technical information about how discounts work behind-the-scenes, see the *Guide to Managing Purchases and Processing Orders* documentation at <http://edocs.bea.com/wlcs/docs35/order/index.htm>.

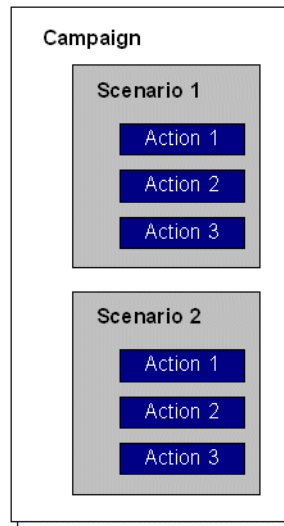
Warning: Because customer orders may be linked to discounts once they are deployed, you will not be able to modify or delete a discount until its associated time frame (duration) has expired or until it can be determined that no orders are linked to the discount. Therefore, it is extremely important that you define discounts appropriately.

Designing Scenario Actions

When you have answered the question, “How can I most effectively communicate my offer?”, you will be ready to design one or more scenario actions for inclusion in your campaign using the E-Business Control Center. For example, you may decide that the circular saw buyers would be most likely to add saw blades to their cart if they saw the 50% discount advertised in an ad that was displayed during check out.

The term **campaign**, as used in the E-Business Control Center, is a named group of scenarios that work together to achieve strategic business goals. **Scenarios**, in turn, implement tactics in support of the campaign's strategic goals. Scenarios are comprised of scenario actions, as shown in Figure 10-1.

Figure 10-1 Campaigns, Scenarios, and Scenario Actions



Using the circular saw buyers example, the over-arching strategic goal would be to increase the number of saw blades purchased by circular saw buyers. A tactic used to achieve this goal might be to display an ad that publicizes the discount to customers in the Circular Saw Buyers segment during check out. Another tactic might be to send regular Circular Saw Buyers an e-mail about the 50% off offer. The goal (campaign) remains the same, but there are different tactical means (scenarios) by which the goal can be achieved.

The implementation of different tactics (scenarios) is accomplished through the **scenario's actions**, which control the particular aspects of your e-commerce Web site. There are three types of scenario actions: ad, discount, and e-mail. You can design your scenario action to display an ad, offer a discount, or send an e-mail when the right conditions are met. The E-Business Control Center provides a variety of conditions that you can use to trigger these scenario actions.

Note: Customers must also be logged into your Web site to experience your promotional campaigns.

You may choose to include multiple scenario action types within a given scenario, and you can create as many scenarios as you like using the E-Business Control Center. However, you should be aware that how you organize your scenarios will affect your promotional campaign, and that there are many possible organizations.

For More Information

- For a brief discussion of other, campaign-related information you will need to specify in the E-Business Control Center, see “Specifying General Campaign Information” on page 10-7.
- If you want to use a discount as a scenario action, you must have previously defined the discount. For more information about defining discounts, see “Defining Discounts” on page 10-4 of this roadmap document or Chapter 8, “Defining Stand-Alone or Campaign Discounts.”
- Ad and e-mail scenario actions require further consideration. For more information, continue with “Authoring Campaign Messages” on page 10-9.
- For guidance on organizing scenario elements and thus your promotional campaigns, see “Deciding on Campaign and Scenario Scope” on page 10-13.
- For more frequently used and more complex scenarios, the E-Business Control Center also provides predesigned scenario templates, so you that do not have to build all your scenarios from scratch. For more information about the scenario templates, see “Using Scenario Templates” on page 10-21.

Specifying General Campaign Information

In addition to scenarios, campaigns also have some general information associated with them. Fortunately, you may have already considered this information during your strategic planning efforts, and perhaps are ready to use this information when creating a campaign in the E-Business Control Center. Before using the E-Business Control Center to implement a campaign, however, be sure you have considered the following:

- Campaign Attributes
- Campaign Duration and End Criteria

Campaign Attributes

Campaign attributes are simply some descriptive information about the campaign that can prove helpful to you when dealing with the campaign in the future. The E-Business Control Center requires that you specify a name for the campaign, a filename under which the campaign should be saved, and a description of the campaign. Optionally, you can specify a goal description (value proposition) for the campaign, such as “to entice circular saw buyers to add saw blades to their cart before check out.” With the exception of the filename, all campaign attributes you specify can later be used as campaign search criteria.

The name you choose for your promotional campaigns also has an effect on future campaign reporting. By applying a standardized naming convention across specific campaign fields you can further simplify the process of organizing and aggregating campaign data for inclusion in reports. For example, if you always begin your promotion names with campaign type (upsell, cross-sell, retention, and so on), you will be able to roll-up, or sort around this standard.

Using the E-Business Control Center, you can also specify a campaign sponsor. Campaign sponsors are entities (that is, organizations) that have commissioned a campaign and on whose behalf the campaign is run. Often, the campaign sponsor will be the same as the organization who owns and operates the e-business Web site, or a department within that organization. However, the Web site owner may want to sell advertising on the site or enter into manufacturer or distributor sponsored campaigns. In such cases, the sponsor is different from the organization that owns the site. In the E-Business Control Center, the sponsor can not only be used as a criterion for campaign searches, but can also be used for reporting and analysis purposes.

For More Information

- For more information about searching for campaigns, see “Searching for Promotional Campaigns” on page 11-27.

Campaign Duration and End Criteria

A campaign normally has a fixed duration, or period of time during which it is active. Thus, the E-Business Control Center will record your campaign’s starting and ending date and time. For campaigns using scenarios with ad actions, however, the E-Business Control Center also provides you with another option: a campaign goal can be used to stop the campaign, prior to its scheduled end date. For example, the goal might be for a certain number of circular saw buyers to **clickthrough** an ad to another

Web page that provides details about a saw blade discount. Or, maybe you just want a certain number of people to see your ad (called an **impression** in the E-Business Control Center). In the E-Business Control Center, these goals are called campaign **end criteria**; when your goal is satisfied, the campaign can end. If supplied, the E-Business Control Center can keep track of the progress made toward your goals (based on customer interactions with the ads on your Web site), and automatically end the campaign when these goals are achieved.

Authoring Campaign Messages

The E-Business Control Center allows you to use both ads and e-mails in scenario actions to convey promotional messages. If you choose either of these options, you must have previously authored these messages (much like you previously define discounts) and consider a few other factors before using them, as described in the following subsections:

- Authoring Ads
- Authoring E-mails

Authoring Ads

An ad can be a graphic, a segment of HTML or plain text, or a file that is displayed by a Web browser plug-in. Before you can use an ad in your promotional campaign, you will first need to:

Develop a collection of ads.

You might work with your Web site's graphic artists to do so.

Load the ads into a content management system.

You might work with your Commerce Business Engineer (CBE) or other technical resource to do so. One important attribute to consider as the ads are loaded into the content management system is an **ad weight**. An ad weight indicates the importance of the ad, relative to other ads in the system.

Determine location(s) on your Web site for ad display.

Ads used within the E-Business Control Center can only appear in predefined locations, called **placeholders**, which are embedded in Web pages by your CBEs (or other technical resources). Placeholders answer the question, “Where on my Web site should this message be conveyed?” For circular saw buyers, you may want to display the ad in a prominent location, like at the top of the shopping cart page. Placeholders should have descriptive names that allow you to quickly identify them.

Determine default ad queries (searches).

One or more ads are returned from the content management system for possible display on your Web site as the result of ad queries (searches). Ad queries are run by placeholders, and can be of two types: default or campaign. Default ad queries are queries that run regardless of whether or not the conditions for your campaign are met, ensuring that some ad is always displayed in the placeholder. When campaign ad queries do apply, you may want to consider whether you still want it to be possible for default ad queries to be run.

Determine relative importance (priority) for your ad queries.

A **display priority** controls how likely it is that an ad query will run, relative to other ad queries that have the potential to be run in the same placeholder. Out-of-the box, default ad queries in the E-Business Control Center automatically have a lower priority than campaign queries, but you can modify this to meet your requirements. Because more than one ad may be retrieved as the result of a query, the ad weight attribute assigned to individual ads in your content management system help determine which ad out of the resulting group is actually displayed to your Web site visitors.

The E-Business Control Center does not detect situations in which multiple ad queries are assigned the same priority. If two ad queries have the same priority, both have the same chances of being run in a placeholder. Be sure to follow your organization’s established policy for assigning display priorities if you wish to avoid this situation.

For More Information

- For technical information about how ads are made available to you in the E-Business Control Center through a Content Management System, see “Describing Ads in Your Content Management System” on page 6-5.

- For more information about the types of ad queries, see “Types of Queries That Ad Placeholders Run” on page 6-2.
- For more technical information about how placeholders and ad queries work, or about ad weights, see “Infrastructure for Displaying Ads” on page 6-4 or “Ad Weights” on page 6-3, respectively.
- For step-by-step information about how to create placeholders and specify default ad queries, see “Creating Ad Placeholders” on page 6-6.

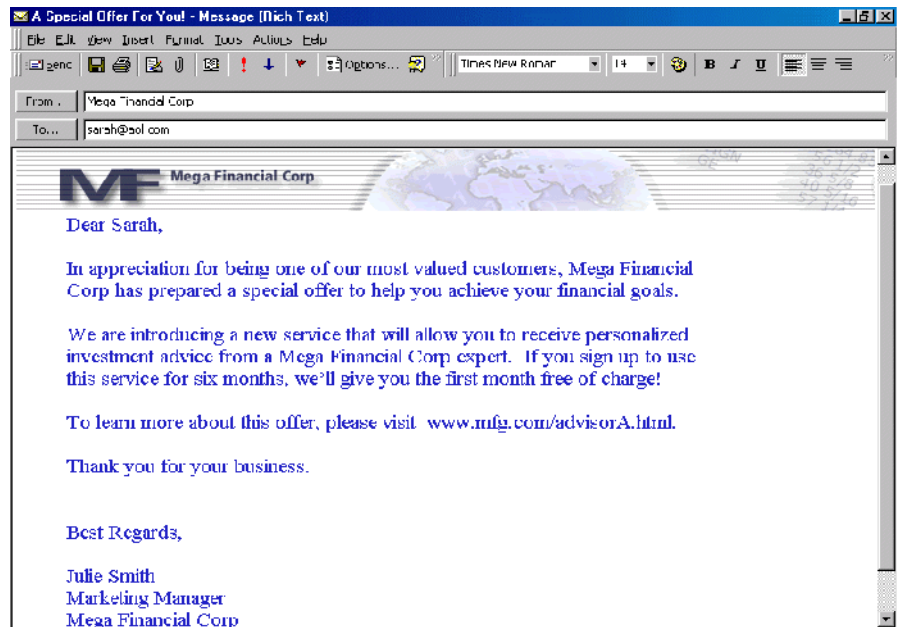
Authoring E-mails

As part of a promotional campaign, you may decide to send an e-mail to specific customers. Before you can send e-mails, however, you will first need to:

Create your e-mail messages.

Like ads, e-mail messages may contain different content depending upon the purpose of your promotional campaign. You may want to include some customer profile information (such as the customer’s name in a salutation) to further personalize your message, as shown in Figure 10-2.

Figure 10-2 Sample Promotional E-mail



Note: To ensure that the appropriate customer profile information is substituted into the message, you may need to collaborate with your Commerce Business Engineer (CBE) or another member of your organization's technical staff to personalize your e-mails in this way.

Save your e-mails as files, in a central location.

You might want to create a collection of e-mails for use in scenario actions. E-mails can be in TXT, HTML, JSP, or XML (with style sheets) formats. (The latter works with Microsoft Outlook e-mails.)

Record the Server URLs for your saved e-mails.

The E-Business Control Center will ask you to specify the Server URL as part of the e-mail scenario action. For example, the URL for an e-mail saved on your server may be:

`http://myserver.com:7501/emails/sample1.jsp.`

For More Information

- For more information about the information used to connect to a server, see Chapter 2, “Connecting the BEA E-Business Control Center to a Server.”

Deciding on Campaign and Scenario Scope

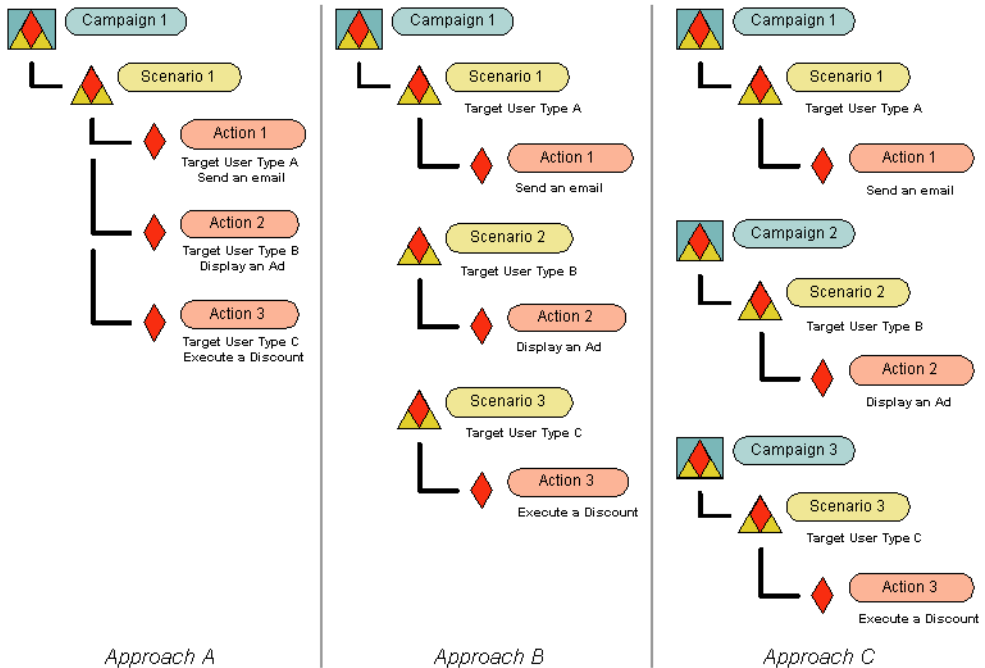
The E-Business Control Center is so flexible that it may seem that there are always multiple ways to accomplish any one goal. And yet, you will learn that there are often preferred ways to use the tool, and to structure your campaigns, depending on factors such as:

- Your internal organization – do campaign sponsors come from different departments or represent a single department?
- Your workflow – will other business analysts be editing and copying your campaigns, or is it a one-person show? Will the sponsor be delegating work to the person using the E-Business Control Center to create campaigns?
- Your development, staging, and production environments – do you use a source-control system and a document- or content-management system?
- Your own skills inventory – are you technically savvy and able to handle situations where your campaigns overlap with custom implementations? Or are you more comfortable being insulated from technical (that is, programming) tasks?
- Your working relationship with IT, programming support, in-house consultants, writers, webmasters, graphic artists, etc. – is your desktop environment for the E-Business Control Center managed closely for you, or do you maintain it yourself, including server connections and access to content, ads, and e-mails?
- Your marketing or merchandising calendar – do you run a monthly special every so often, or is your catalog filled with dozens of overlapping specials and discounts?
- Your user base – is your audience segmented only vertically, by their value to the business (e.g., purchase history, tier), or are they also segmented horizontally (e.g., by class of partnership, business group, role, or submarket)?

10 Roadmap for Creating Promotional Campaigns

Consider the following sets of campaigns (strategic), scenarios (tactical), and actions (operational), shown in Figure 10-3.

Figure 10-3 Campaign and Scenario Nesting Approaches

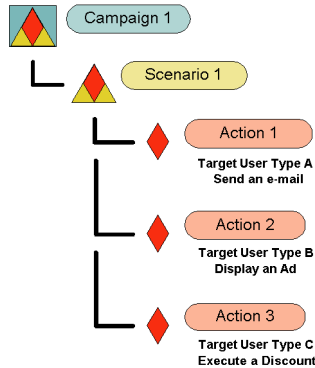


These three campaign approaches are apparently equivalent. Each approach will result in customers being recognized if they are members of one of three target segments, and being sent or displayed the appropriate content (that is, each approach satisfies an identical customer use case).

However, each has pros and cons, even in this simple generic example.

Approach A

Figure 10-4 A Closer Look at Approach A



Approach A (shown again in Figure 10-4), where all actions are lumped into a single scenario in a single campaign, is best when:

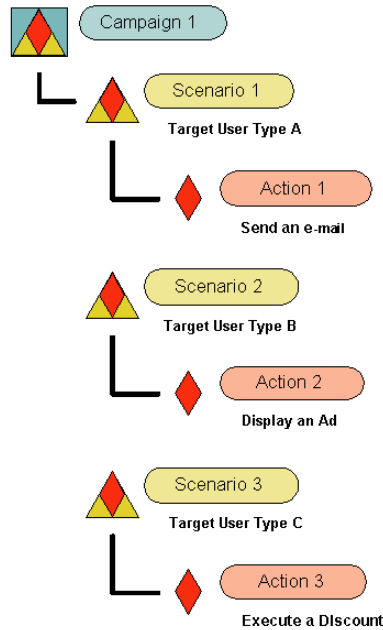
- All the interactions are sponsored by one sponsor and run for the same period of time.
- The campaign is set to end automatically when a certain number of impressions or clickthroughs is reached in Action 2 (the Ad Action), and you want the e-mail and discount actions to shut off at the same time.
- The single scenario, with its three actions, can be thought of as a unified business case, all supporting each other, for example, a succinct offer or incentive, including the presentment of the offer (ad), the discount itself, and a positive feedback (e-mail).

Approach A has drawbacks for the following situations:

- When each action has its own sponsor or administrator.
- Each action has a distinct business purpose, goal, or description. For ease of management, these would be best captured in separate campaigns or scenarios, which fields for description, and so on.
- If the campaign is set to end automatically when a certain number of impressions or clickthroughs is reached in Action 2 (the Ad Action), and you do not want the e-mail and discount actions to cease at the same time.

Approach B

Figure 10-5 A Closer Look at Approach B



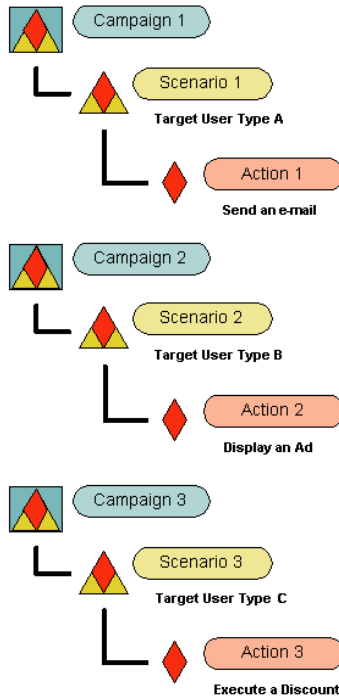
Consider Approach B (shown again in Figure 10-5), which puts each action into separate scenario—but all within a single campaign—for the following case:

- If you administer campaigns as a larger promotional unit, and within a campaign administer several programs. For example:
 - Q2 Loyalty Campaign (channel scenarios):
 - E-mail component (multiple e-mail actions)
 - Ad component (multiple ad actions)
 - And so on.
 - ... or:
 - Holiday Specials Campaign (departmental scenarios):
 - Sporting goods scenario (e-mail/ad/discount)

- Surplus auction scenario (e-mail/ad/discount)
- And so on.

Approach C

Figure 10-6 A Closer Look at Approach C



Approach C (shown again in Figure 10-6), which breaks every action and scenario out into separate campaigns, is best in the following cases:

- Each interaction is sponsored by a different sponsor, and runs for different periods of time.
- When each action has its own administrator.

- Each action has a distinct business purpose, goal, or description. For ease of management, these would be best captured in separate campaigns, which fields for description, and so on.
- If you have more than a few people administering campaigns with the E-Business Control Center. Approach C pushes every interaction up to the level of a campaign, where its title is visible and searchable in the Explorer window.

A Note About These Approaches

If you look again at Figure 10-3, you will see that Approaches A and B might represent any individual campaign, such as you will first create when you begin to use E-Business Control Center.

However, Approach C might resemble your collection of campaigns and scenarios after some time, when you have built and launched multiple campaigns. Each of the campaigns nested within Approach C can have a structure like that of Approach A or Approach B.

This observation suggests that new users of the E-Business Control Center proceed conservatively, dividing up campaigns according to their internal business processes and marketing programs, and reassess their practices periodically, trying to strike a happy medium that avoids either of these extremes:

- Cramming too much functionality into a single campaign, limiting access to and management of its constituent actions.
- Breaking every action into its own campaign, sacrificing the power of the scheduling tools and scenario branching, and unnecessarily cluttering the Explorer interface with long lists of campaigns.

Campaign Maintenance

When saving your campaigns, the E-Business Control Center will ask you to supply a campaign filename. Campaign filenames should start with a letter or underscore. Filenames should contain only letters, digits, underscores, hyphens and periods. None

of your campaign filenames should contain spaces or use the reserved name `defaultID`. As you can see, this leaves you a lot of flexibility in how you save your campaigns.

However, you or others in your organization might find that establishing and following certain naming conventions for campaigns is useful. For example, campaign file naming conventions might help you tie together and therefore quickly locate related campaigns, or assist you when it comes time to run analytic reports.

You will also find it beneficial to write good descriptions for your campaigns. You might even use descriptions as a way to coordinate with other users of the E-Business Control Center. For example, you might want to include an author or contact name in the campaign description, so that others who see the campaign know who to contact if and when they have questions about that campaign.

Customer Segments in Scenarios and Actions

As previously discussed, the E-Business Control Center allows you to target customers for personalized content and messaging by creating dynamic groupings called customer segments. Every visitor may be evaluated during their session in your site or application, to determine if they qualify for targeting as a member of one or more defined customer segments. In order to determine if a customer is a member of a given segment, each qualifying condition you specify is evaluated. Thus, a segment is a manageable way of bundling together two or more characteristics that represent a complex customer type.

An important point to recognize is that both scenarios and actions can be targeted at segments. (Neither a scenario nor any of its constituent actions is required to be targeted at a customer segment.)

Order and Logic of Evaluation

Segments in a scenario and segments in its actions are evaluated as if they are connected with AND logic; that is, if segments are used at both levels, then a customer must qualify as a member of both segments in order for the customer to be targeted in that campaign.

Usefulness of Chaining Segments

The logic of AND-ing segments means that you can use them to progressively narrow your targeting, without having to script new, even more-complex segments.

Retail Example

You could target a scenario only at Active Browsers (in other words, the visitor's last visit is less than 10 days ago, with total purchases less than X), and then target separate actions within that campaign to Stay-at-Home Moms (that is, female visitors with children under 10 and a session time between 10 a.m. and 4 p.m.), and Internet Pros (visitors with a high-speed connection, software/internet employment, and income \$100K+).

B2B Example

You could target a scenario only at Tier 1 Customers, and then target separate actions within that campaign to Managers and Accounting.

Cautionary Notes

Note that it is possible to target nobody by carelessly chaining the targeting of segments in a scenario and its actions.

Absurd Example

You could target a scenario only at Male Category A (using some set of conditions, including male gender), and then target a separate action within that campaign to Female Category A (using some set of conditions, including female gender). This action would actually target no customer, since it would be looking for female customers only within the male users that satisfied the topmost scenario segment.

A more likely case of this phenomenon would be one where very few users satisfied all the conditions of both the scenario segment and its action segments. Therefore, it is important to be familiar with the underlying conditions that make up your established segment definitions.

What if You Only Need to Target One Segment?

Where should you input your segment targeting (if any)—at the scenario level, or at the action level?

Typically it should be at the scenario level for the following reasons:

- A campaign's targeting may be easier to manage at the scenario level, even if it contains a complex series of ad, e-mail, and discount actions.
- The typical business model for personalized campaigns asks first “whom do you want to target?” Putting segment targeting at the top level ensures that other business users inspecting your campaigns in the E-Business Control Center can locate the targeting quickly, without having to delve into individual scenario actions.

However, you may be useful to put the targeting at the action level, such as when:

- You anticipate needing to add parallel actions within the same scenario later, but target those actions at different customer segments.

Using Scenario Templates

Out-of-the-box, the E-Business Control Center provides you with four scenario templates that you can modify to quickly create scenarios that are meaningful for your promotional campaigns. The goal of these scenario templates is to provide useful, easily applicable, and time-saving templates for reuse, and to illustrate more advanced applications of the E-Business Control Center. The following paragraphs provide a brief description of each scenario template that comes packaged with the E-Business Control Center.

Registration Confirmation E-mail

Demonstrates how a registration confirmation e-mail can be sent to visitors to your Web site.

Discount and Ad Actions

Displays a discount ad in conjunction with an associated discount action. In other words, if a customer sees the discount ad and as a result, purchases the item shown in the ad, the customer will receive a discount.

Online Content Test

Tests content effectiveness using probability-based branching. This scenario template targets approximately 100% of the visitors in the matching customer segments who visit the site while the campaign is running.

E-mail Pilot Test

Pilot tests the effectiveness of three different e-mail messages. This scenario template targets approximately 15% of the visitors in the matching customer segments who visit the site while the campaign is running. It is expected that the e-mail generating the best response would be rolled out to a wider customer population.

Though some values will be predefined as part of the scenario templates, you will still need to provide specific values for any bracketed, hyperlinked text shown by clicking on them. However, you may also choose to uncheck some of the conditions associated with the bracketed text, if you choose to remove these hyperlinks instead.

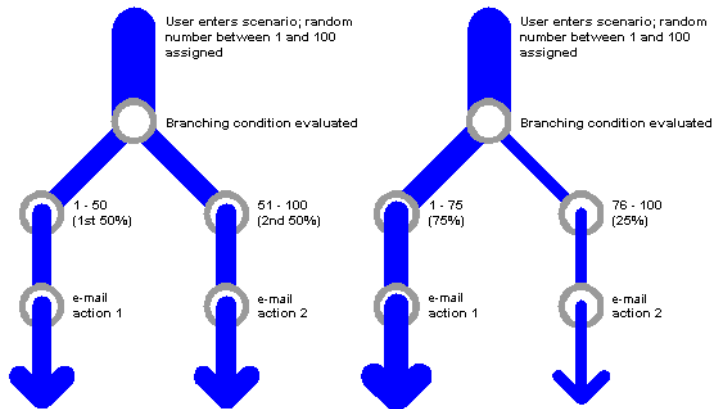
About Probability-Based Branching

Probability-based branching is a mechanism for dividing up scenario actions in a campaign into proportional but random segments (subject to other conditions that may apply). Each time a scenario is evaluated to determine if any of its actions (ad, e-mail, or discount) apply to the customer, a random number between 1 and 100 is automatically generated by the system. If any action in the scenario includes a probability-based branching condition, then that number is used in its evaluation. If no scenario includes branching, then the number is forgotten, and a new random number is assigned for the next scenario in the campaign.

Branching is designed to provide two distinct capabilities:

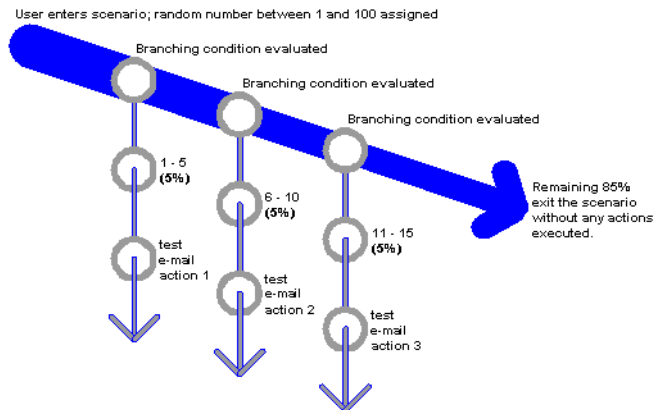
- Dictate that all the actions in a scenario be executed exclusive of each other (branching) and in some specific proportion to each other, as shown in Figure 10-7.

Figure 10-7 Branching the Entire Population by Varying Percentages



- Scale down the number of times a scenario executes to some small percentage of all visitors, as shown in Figure 10-8. This is useful for conducting test marketing against less than all users of the site or application.

Figure 10-8 Branching a Small Percentage of the Population, as a Test Case



Note: It is important to keep in mind what the base of the branching condition is. Consider a branching condition set at 1 to 50. Will this condition filter its action to execute only for half your customers? Not necessarily.

First of all, remember that the 50% branch condition is only being evaluated for *customers that visit the site*. Secondly, active visitors may be further filtered by some customer segment targeting *at the scenario level*, and then again *at the action level*. So the final 50%, in some cases, may be a percent of a percent of a percent...and so on. (For more information about defining customer segments at the campaign and scenario levels, see “Customer Segments in Scenarios and Actions” on page 10-19.)

This is particularly important to keep in mind when using smaller branches (approximately 5%) for test marketing. Depending on customer segmentation, a 5% or 3% branch may target so few customers as to be statistically meaningless. Think through the targeting and branching so you reach a useful number of your user base.

Setting a Scenario to Run Just Once for a Visitor

Of particular use when branching actions for test marketing is the Once This Action Is Performed, Do Not Run The Scenario Again For This Visitor check box option, shown in the New Action windows (for ads, discounts, and e-mails). In the ordinary course of campaigns, each time a qualifying visitor comes to the site, that visitor can be targeted with whatever promotional messages (ads and/or e-mails) and discounts are active. However, you usually need mutually exclusive populations for valid market tests. Therefore, the E-Business Control Center provides the ability to have a scenario run once only per visitor. This feature is also pertinent in the case of e-mail campaigns. In many cases, you will want customers to receive only one copy of a given promotion via e-mail.

Extending the Services That Support the E-Business Control Center

Out-of-the-box, the E-Business Control Center provides many elements you can use to create your own unique promotional campaigns. However, it is possible that you may want to extend the E-Business Control Center to more closely match your e-marketing needs. For example, the E-Business Control Center allows you to select from a number of predefined customer behaviors (events) to trigger scenario actions. If you think of an event that is not already available, you may want it to be created and added to the system. Customer profile information is another example; the system is extremely flexible in the data it can store about visitors to your Web site.

If you believe that extending the E-Business Control Center would be helpful, you will initially need to collaborate with a Commerce Business Engineer (CBE) or other technical resource in your organization who can make modifications to the tool. If possible, you should initiate this process before proceeding with the E-Business Control Center.

For More Information

To determine what events are initially available for use in the E-Business Control Center, see “Standard Events” on page 7-2. However, keep in mind that if your organization extends the services that support the E-Business Control Center, you should use the E-Business Control Center itself to view the most up-to-date list.

11 Creating and Managing Promotional Campaigns

This topic contains step-by-step information for defining a new campaign or modifying existing campaigns within the BEA E-Business Control Center. It does not contain conceptual descriptions of a campaign, nor an explanation about the business applications of campaigns. It is therefore highly recommended that before proceeding, you read and understand the concepts explained in Chapter 10, “Roadmap for Creating Promotional Campaigns.”

This topic includes the following sections:

- Creating a New Promotional Campaign
 - Specify General Campaign Information
 - Enter the Campaign Duration and End Criteria
 - Add Scenarios to the Campaign
 - Add Actions to Your Scenarios
 - Save Your Promotional Campaign
- Locating Existing Campaigns
 - Using the Name Filter to Locate Campaigns
 - Searching for Promotional Campaigns
 - Switching Between Scenario Views

- Modifying Existing Campaigns
- Deleting Existing Campaigns

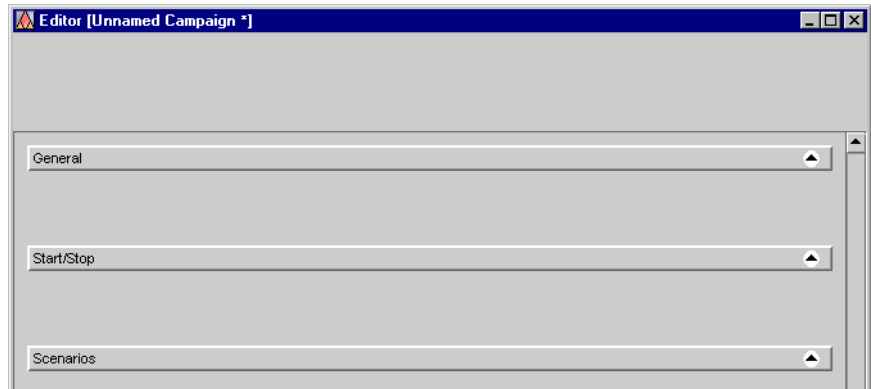
Creating a New Promotional Campaign

Note: Before you can create a new promotional campaign, you must connect the E-Business Control Center to a server. For more information on connecting to a server, see “Connecting the BEA E-Business Control Center to a Server” on page 2-1.

To create a new promotional campaign, follow these steps:

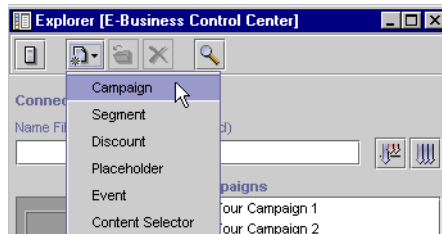
1. From the BEA E-Business Control Center File menu, select New → Campaign. The Campaign Editor window opens, as shown in Figure 11-1.

Figure 11-1 Campaign Editor Window



Tip: You can also click the New icon in the Explorer window and then select Campaign to open the Campaign Editor window, as shown in Figure 11-2.

Figure 11-2 New Icon, Campaign Selection



2. You must now follow the steps provided in the following sections to:
 - Specify General Campaign Information
 - Enter the Campaign Duration and End Criteria
 - Add Scenarios to the Campaign
 - Add Actions to Your Scenarios
 - Save Your Promotional Campaign

Specify General Campaign Information

1. Click the upward facing arrow, shown on far right side of the General bar. The General bar opens and the arrow faces downward, as shown in Figure 11-3.

Figure 11-3 General Campaign Information Pane

A screenshot of a "General" information pane. It contains four input fields: "Campaign Name" (with "Unnamed Campaign" entered), "Campaign Sponsor", "Description", and "Goal Description: (optional)". The "Campaign Name" field is highlighted with a blue border. A small downward-pointing arrow is visible in the top right corner of the pane.

2. Enter a unique and descriptive name in the Campaign Name field. Then enter a description, campaign sponsor, and optionally, a goal description in the remaining fields. The campaign name you enter appears at the top of the Campaign Editor window.

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3. If desired, click the downward facing arrow on the General bar to close the General bar.

Enter the Campaign Duration and End Criteria

1. Click the upward facing arrow, shown on far right side of the Start/Stop bar. The Start/Stop bar opens and the arrow faces downward, as shown in Figure 11-4.

Figure 11-4 Campaign Duration and End Criteria Pane

The screenshot shows a software window titled "Editor [Unnamed Campaign *]" with a sub-header "Sample Campaign". The "Start/Stop" pane is expanded, showing fields for "Start date:" (with a dropdown arrow), "Start time:" (12:00 AM), "Stop date:" (with a dropdown arrow), and "Stop time:" (11:59 PM). There is a checkbox labeled "Deactivate this campaign". Below this is the "End Criteria" section, which includes a text box for specifying goals and a table for defining goals.

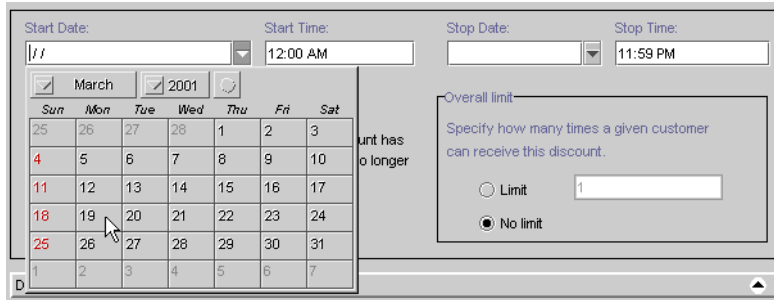
Ads	Goal Type	Target	Total basis	Scope

Buttons for "New", "Edit", and "Delete" are located to the right of the table. Below the table are two radio button options: "End the campaign when ALL of the goals are met" (selected) and "End the campaign when ANY of the goals are met". At the bottom of the window is a "Scenarios" pane.

2. Enter a start date, start time, stop date, and stop time for your promotional campaign in the fields provided.

Tip: For the start and stop date, you can either type in the date, or click the drop-down list to select the date from a calendar, as shown in Figure 11-5. Just click the date to select it.

Figure 11-5 Start/Stop Date Calendar



3. If your promotional campaign will contain scenarios with ad actions, you may now want to specify end criteria (goals). For more instructions on how to specify campaign end criteria, see “Specifying Campaign End Criteria” on page 11-5.

Note: For more information about ad actions, see “Designing Scenario Actions” on page 10-5.

4. If desired, click the downward facing arrow on the Start/Stop bar to close the Start/Stop bar.

Specifying Campaign End Criteria

If you plan on using ad actions in your scenarios and want to end your campaign when certain ad-related goals are reached, you may want to supply some campaign end criteria. If the campaign end criteria are met, the campaign will be terminated even if the date on which this occurs is prior to the stop date you specified.

Note: To improve performance, your Commerce Business Engineer (CBE) may create a cache that limits the number of times a campaign checks with the database to determine whether it has achieved its goal. By default, a campaign updates the cache every 5 minutes. If the cache contains stale data, then it may be possible for a campaign to exceed its goal. For more technical information about this performance-related topic, refer to “Campaign Service Properties” in the *Deployment Guide* documentation.

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You can specify campaign end criteria based on the number of impressions (views) associated with the ad, on the number of ad clickthroughs, or a combination of both.

To specify campaign end criteria, follow these steps:

1. If the Start/Stop bar is not open, click the upward facing arrow shown on the far right side of the Start/Stop bar to open it. The Start/Stop bar opens and the arrow faces downward.
2. In the End Criteria region of the Start/Stop pane, click New. The End Criteria Detail window opens, as shown in Figure 11-6.

Figure 11-6 End Criteria Detail Window

The screenshot shows the 'End Criteria Detail' dialog box. It features a title bar with a close button. The main area is divided into several sections. On the left, under 'Ad To be tracked', there is a text input field containing 'Ads/wlcscm_ads/tourBannerFixup.jpg', an 'Add' button, and a 'Remove' button. Below this is a list box and a 'Target number:' input field. The 'Goal Scope' section on the right has two radio buttons: 'Count ad events based on this campaign only' (selected) and 'Count ad events across all campaigns'. The 'Goal Type' section below it has two radio buttons: 'Ad Impressions' (selected) and 'Ad Clickthroughs'. At the bottom, there are two radio buttons for target number calculation: 'Base the Target Number on the sum of all ads in the list' (selected) and 'Base the Target Number on the count for any single ad in the list'. 'OK' and 'Cancel' buttons are at the bottom right.

3. In the Ad To Be Tracked region of the End Criteria Detail window, enter an ad identifier into the field.
Note: The ad identifier is a unique name of the ad, with the relative path. In the Tour Campaign 1, for example, the ad identifier used is: `Ads/wlcscm_ads/tourBannerFixup.jpg`. However, the details of exactly what constitutes an ad identifier may vary from one content management system to another. Be sure to check with your Commerce Business Engineer (CBE) for details.
4. Click Add. The ad identifier is added to the list below.
5. If necessary, repeat steps 3 and 4 until all the ads you want are listed.

Note: If you make a mistake and want to remove an ad identifier from the list, click the ad identifier in the list to select it, then click Remove.

6. Specify a target number in the Target Number field.
7. Select a Total Basis option for the ads in the list. The total basis indicates whether the target number should be based on the sum of all the ads in the list, or on the count for any single ad shown in the list.
8. In the Goal Scope region of the window, select whether you want to count the ads only within this campaign or across multiple campaigns.

Choosing to count the ads across multiple campaigns means that if a visitor in another campaign views/clicks the ad, the impression/clickthrough would still be counted as an increment in this campaign toward meeting the goal.

9. In the Goal Type region of the window, select whether the target number you specified applies to the number of ad impressions (views) or the number of ad clickthroughs.
10. Click OK. The End Criteria Detail window closes, and the information you specified appears in the Goals list (as shown in Figure 11-7).

Figure 11-7 Goals List

Ads	Goal Type	Target	Total basis	Scope
Ads/wlcscsm_ad...	Ad Impressions	34	All ads	This Campaign

11. If necessary, repeat steps 2 through 10 until you have specified all the end goals you want.

Note: If you make a mistake and want to remove a goal from the Goal list, click the goal in the list to highlight it, then click Delete. Or, you can click Edit to modify the information you specified for that goal in the End Criteria Detail window.

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12. At the bottom of the End Criteria region, specify whether you want to end the campaign when any or all of the goals shown in the Goals list are met.
13. If desired, click the downward facing arrow on the Start/Stop bar to close the Start/Stop bar.

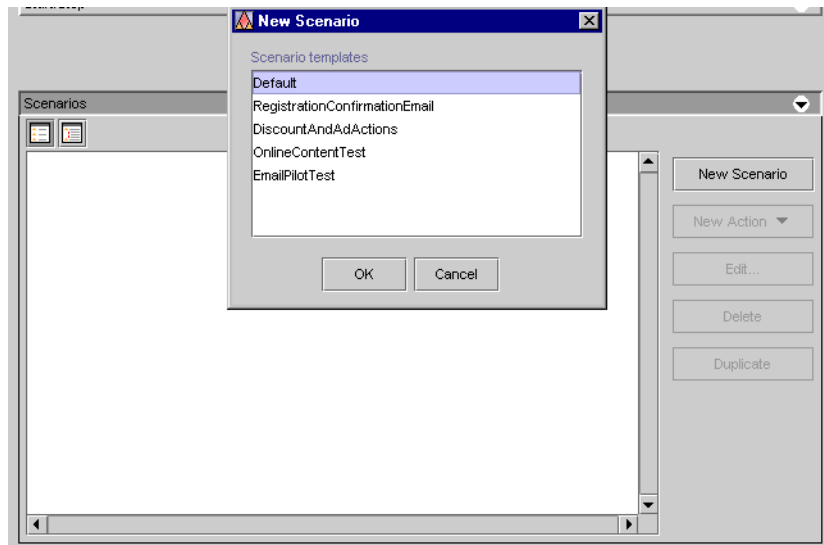
Add Scenarios to the Campaign

Because campaigns are groups of scenarios that are associated with a business goal, scenarios are at the very heart of your campaign. In scenarios, you will specify one or more actions to take place on your Web site when certain conditions are met.

To add scenarios to the campaign, follow these steps:

1. Click the upward facing arrow, shown on far right side of the Scenarios bar. The Scenarios bar opens and the arrow faces downward, as shown in Figure 11-8.

Figure 11-8 Scenarios Pane



2. Click New Scenario. The New Scenario window opens, displaying a list of scenario templates.

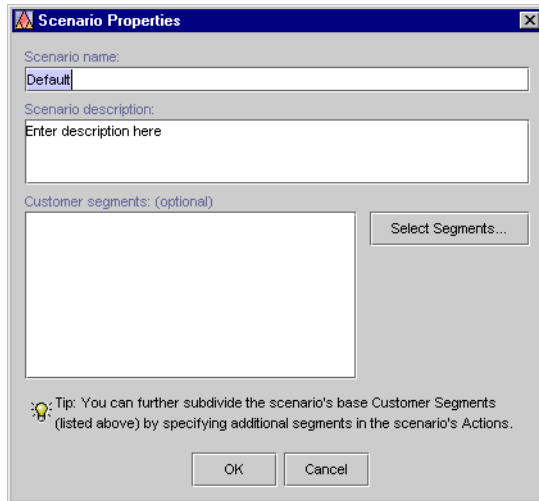
Note: For a description of each scenario template, see “Using Scenario Templates” on page 10-21.

Tip: If you would rather start with a copy of an existing scenario, click an existing scenario name in the Scenarios list to select it and then click Duplicate. A copy of the scenario appears in the Scenarios list. You can then click Edit to modify the scenario as appropriate.

3. Click a scenario template name in the list to select it, then click OK. The Scenario Properties window opens, as shown in Figure 11-9.

Tip: To start with a blank scenario, choose Default.

Figure 11-9 Scenario Properties Window



4. Enter a unique name for the scenario in the Scenario Name field, and a description of the scenario in the Scenario Description text area.
5. If you want to select customer segments at the scenario level, you may do so now. See “Selecting Customer Segments” on page 11-10 for instructions.

Note: For an explanation of why you might want to select customer segments at the scenario level and how this is different from selecting segments at the scenario action level, see “Customer Segments in Scenarios and Actions” on page 10-19.

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6. Click OK. A message appears indicating that the new scenario has been created and that you may now add actions to the scenario.
Tip: If you do not want to see this message again, click the Do Not Show This Message again check box.
7. Click OK. The scenario name you specified appears in the Scenarios list.
Note: If you selected customer segments in step 5, these appear in addition to the scenario name in the Scenarios list.
8. Add actions to the scenario, as described in “Add Actions to Your Scenarios” on page 11-11.

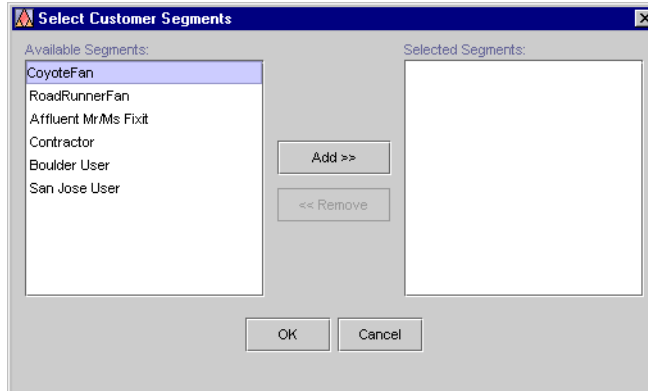
Selecting Customer Segments

Notes: Customer segments defined within a scenario apply to the entire scenario. You can also select customer segments when you are adding specific actions to your scenario. Specifying segments here, at the scenario level, produces a different effect from when you specify segments at the scenario action level. Depending on your situation, you may also want to specify segments at both levels. For more information about these issues, see “Customer Segments in Scenarios and Actions” on page 10-19.

To select customer segments, you must have previously created them. For information on creating customer segments, see Chapter 4, “Using Customer Segments to Target High-Value Markets.”

1. In the Scenario Properties window, click Select Segments. The Select Customer Segments window opens, as shown in Figure 11-10.

Figure 11-10 Select Customer Segments Window



2. Click a customer segment name shown in the Available Segments list to select it. The customer segment is highlighted.
3. Click Add. The customer segment moves to the Selected Segments list.
4. Repeat steps 2 and 3 for each customer segment you want to add.
Note: If you make a mistake, click a customer segment name shown in the Selected Segments list to select it, then click Remove.
5. Click OK. The Select Customer Segments window closes, and the customer segments you selected appear in the Customer Segments list in the Scenario Properties window.

Add Actions to Your Scenarios

Now that you have defined your scenario, you must add actions to it. There are three types of actions you can add to a scenario:

- Ad Actions
- Discount Actions
- E-mail Actions

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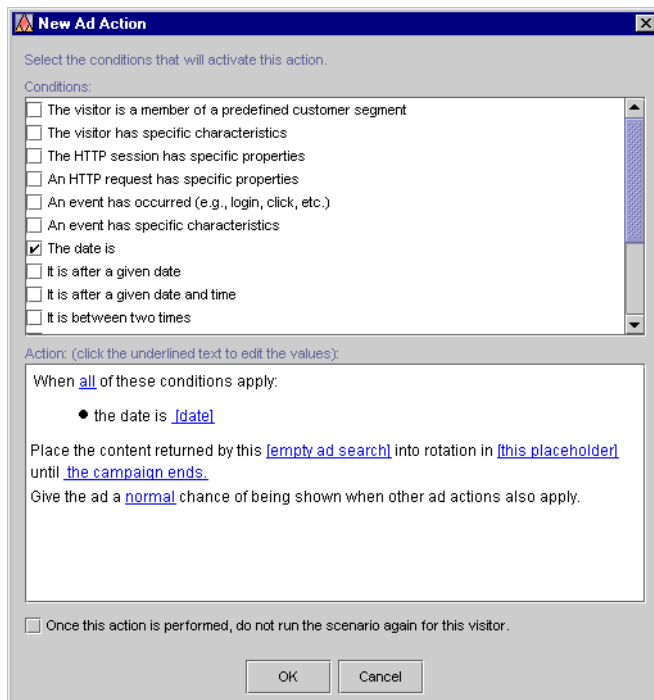
Ad Actions

Note: When you specify an ad action, you are essentially defining criteria that will be used to select an appropriate ad for your online customer from a number of ads that are stored in your organization’s content management system. Be sure that you have already developed these ads and that the ads exist within your content management system. For more information, see “Authoring Ads” on page 10-9 or “Describing Ads in Your Content Management System” on page 6-5.

To add ad actions to your scenario, follow these steps:

1. If necessary, click the name of the scenario in the list to select it. The scenario is highlighted.
2. Using the New Action button, select Ad. The New Ad Action window appears, as shown in Figure 11-11.

Figure 11-11 New Ad Action Window



- Click the check boxes shown in the Conditions portion of the New Ad Action window to select the condition(s) under which the ad will be displayed. Text describing the conditions you selected appears in the Action portion of the New Ad Action window.

Note: You must add at least one condition, or you will not be able to save the scenario action. For an explanation of the possible conditions, see “Listing of the Available Conditions” on page 3-2.

Tip: You can use conditions in ways that always evaluate to true. For example, you can select the It Is after a Given Date condition and then specify the date as January 1, 1970.

- For each condition you selected in step 3, you must specify values for any bracketed hyperlinked text that appears in the Action portion of the window.

For example, if you selected the Date Is condition as shown in Figure 11-11, you must specify a value for the hyperlinked [date] text in the Date Is [Date] condition statement, shown in the Action portion of the New Ad Action window.

To specify values for bracketed hyperlinked text, just click the text. Depending upon the condition and the hyperlink, a window or a dialog box opens. Table 11-1 provides a consolidated listing of the conditions and indicates where to look if you need detailed instructions for any of the corresponding windows/dialog boxes.

Note: Table 11-1 shows all the conditions that may be used within the E-Business Control Center. Therefore, not all conditions shown here may apply.

Table 11-1 Instructions for Building Conditions

Condition(s)	Relevant Instructions
The visitor is a member of a predefined customer segment	“Using the Select Customer Segments Window” on page 3-4
A visitor, HTTP session, HTTP request, or an event has specific characteristics	“Using the Properties and Property Values Windows” on page 3-5
An event (such as login or click) has occurred	“Using the Select Events Window” on page 3-9

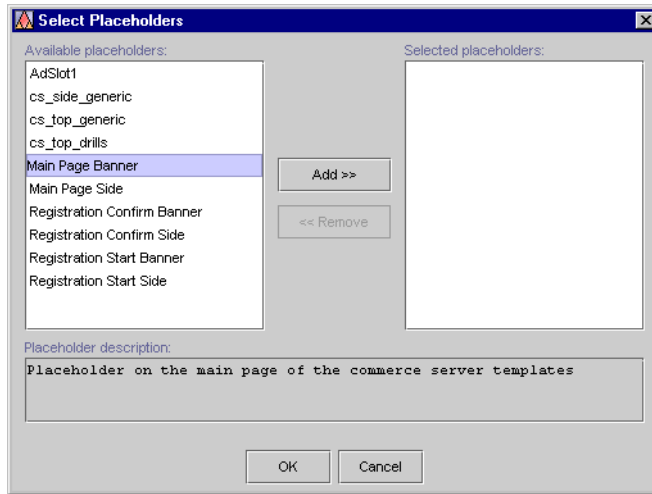
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Table 11-1 Instructions for Building Conditions (Continued)

Condition(s)	Relevant Instructions
Dates and times	“Using the Date/Time Entry Dialog Boxes” on page 3-10
There is a specific item in the shopping cart, there is an item from a given category in the shopping cart, the value of items in the cart is a certain amount	“Using the Quantity Selector or Currency Selector Dialog Boxes” on page 3-11 “Using the Select Operator Dialog Box” on page 3-12 “Using the Enter SKU Numbers or Enter Categories Windows” on page 3-13
A random number falls within a given range	“Using the Enter a Range Dialog Box” on page 3-14

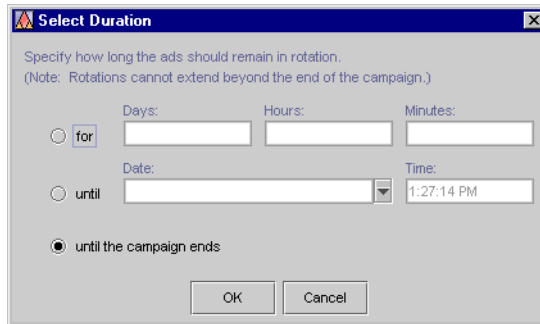
5. If you selected more than one condition in step 3, you may want to click the All hyperlink in the When All Of These Conditions Apply phrase to change All to Any.
Note: The Any/All link acts as a toggle. Clicking on Any will change it to All, and visa versa.
6. Click the [empty ad search] hyperlink. The Properties window opens. Follow the instructions in “Constructing Queries” on page 3-15 to specify criteria for the ad that should be displayed.
7. Click the [this placeholder] hyperlink. The Select Placeholders window opens, as shown in Figure 11-12.
Note: To select placeholders, you must have previously created them. For information on creating placeholders, see “Creating Ad Placeholders” on page 6-6.

Figure 11-12 Select Placeholders Window



8. In the Select Placeholders window, follow these steps:
 - a. Click a placeholder name shown in the Available Placeholders list to select it. The placeholder is highlighted.
 - b. Verify that you are selecting the appropriate placeholder by viewing the text shown in the Placeholder Description text area.
 - c. Click Add. The placeholder moves to the Selected Placeholders list.
 - d. If desired, repeat steps a-c to select other placeholders.
 - e. Click OK. The Select Placeholders window closes. The placeholder name appears in place of the generic [Placeholder] hyperlink in the Action portion of the New Ad Action window.
- Note:** If you make a mistake, click a placeholder name shown in the Selected Placeholders list of the Select Placeholders window to select it, then click Remove.
9. Click the [the campaign ends] hyperlink. The Select Duration window appears, as shown in Figure 11-13.

Figure 11-13 Select Duration Dialog Box

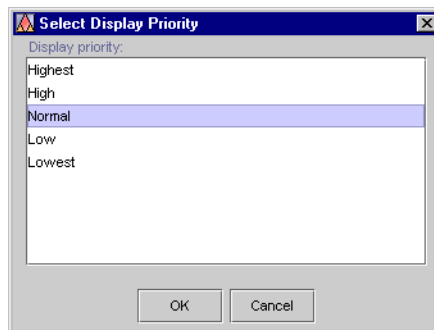


10. In the Select Duration dialog box, set a time at which the ad will be cleared from the placeholder, and click OK.

For example, if a promotion within your campaign ends prior to the end of the campaign, this feature helps ensure that promotional ads don't appear after the promotion ends.

11. If desired, click the Normal hyperlink. The Select Display Priority dialog box opens with Normal preselected as a default value, as shown in Figure 11-14.

Figure 11-14 Select Display Priority Dialog Box



- a. Click a value in the Display Priority list to select it. The priority value is highlighted.
- b. Click OK. The Select Display Priority dialog box closes. The display priority value appears in place of the Normal hyperlink in the Action portion of the New Ad Action window.

Note: For more information on ad display priorities, see “Authoring Ads” on page 10-9.

12. If desired, click the check box located at the bottom of the New Ad Action window to run the scenario only once per visitor.
13. Click OK. The New Ad Action window closes. The conditions and corresponding actions you selected appear beneath the scenario name (and if applicable, customer segments) in the Scenarios list.

Note: You may add different types of scenario actions to your scenario. For example, you may now want to add a discount or e-mail action to the same scenario where you just added the ad action. You may also choose to add another ad action to the same scenario. (Whether you do so or not depends upon whether you want to target the same segments that are specified in this scenario.)

Tip: If you would like to start with a copy of an existing scenario action, click an existing scenario action in the Scenarios list to select it and then click Duplicate. A copy of the scenario action appears in the Scenarios list. You can then click Edit to modify the scenario action as appropriate.

14. If desired, click the downward facing arrow on the Scenarios bar to close the Scenarios bar.

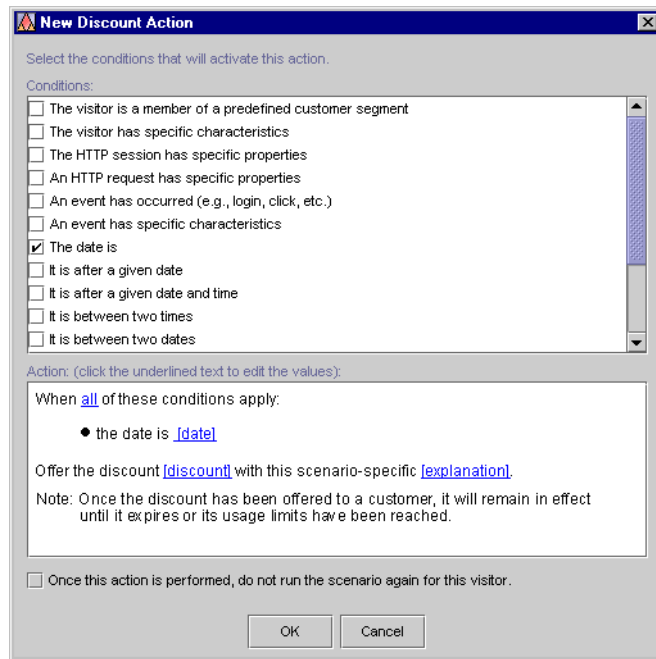
Discount Actions

Note: As part of specifying a discount action, you will need to select from a list of predefined discounts. Be sure that you have already defined some discounts, as explained in “Defining a New Discount” on page 8-12.

To add discount actions to your scenario, follow these steps:

1. Click the name of the scenario in the list to select it. The scenario is highlighted.
2. Using the New Action button, select Discount. The New Discount Action window appears, as shown in Figure 11-15.

Figure 11-15 New Discount Action Window



3. Click the check boxes shown in the Conditions portion of the New Discount Action window to select the condition(s) under which the discount will be offered. Text describing the conditions you selected appear in the Action portion of the window.

Note: You must add at least one condition, or you will not be able to save the scenario action. For an explanation of the possible conditions, see “Listing of the Available Conditions” on page 3-2.

Tip: You can use conditions in ways that always evaluate to true. For example, you can select the It Is after a Given Date condition and then specify the date as January 1, 1970.

4. For each condition you selected in step 3, you must specify values for any bracketed hyperlinked text that appears in the Action portion of the window.

For example, if you selected The Date Is condition as shown in Figure 11-15, you must specify a value for the hyperlinked [date] text in The Date Is [Date]

condition statement, shown in the Action portion of the New Discount Action window.

To specify values for bracketed hyperlinked text, just click the text. Depending upon the condition and the hyperlink, a window or a dialog box opens. Table 11-2 provides a consolidated listing of the conditions and indicates where to look if you need detailed instructions for any of the corresponding windows/dialog boxes.

Note: Table 11-2 shows all the conditions that may be used within the E-Business Control Center. Therefore, not all conditions shown here may apply.

Table 11-2 Instructions for Building Conditions

Condition(s)	Relevant Instructions
The visitor is a member of a predefined customer segment	“Using the Select Customer Segments Window” on page 3-4
A visitor, HTTP session, HTTP request, or an event has specific characteristics	“Using the Properties and Property Values Windows” on page 3-5
An event (such as login or click) has occurred.	“Using the Select Events Window” on page 3-9
Dates and times	“Using the Date/Time Entry Dialog Boxes” on page 3-10
There is a specific item in the shopping cart, there is an item from a given category in the shopping cart, the value of items in the cart is a certain amount	“Using the Quantity Selector or Currency Selector Dialog Boxes” on page 3-11 “Using the Select Operator Dialog Box” on page 3-12 “Using the Enter SKU Numbers or Enter Categories Windows” on page 3-13
A random number falls within a given range	“Using the Enter a Range Dialog Box” on page 3-14

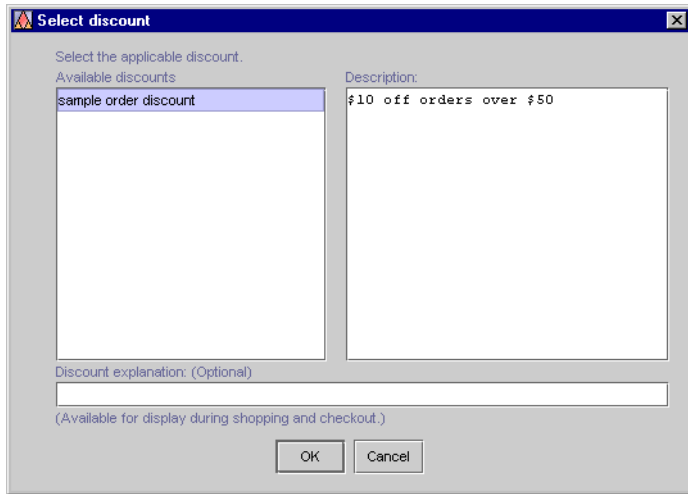
- If you selected more than one condition in step 3, you may want to click the All hyperlink in the When All Of These Conditions Apply phrase to change All to Any.

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Note: The Any/All link acts as a toggle. Clicking on Any will change it to All, and visa versa.

6. Click the [Discount] or [Explanation] hyperlinks. The Select Discount window opens, as shown in Figure 11-16.

Figure 11-16 Select Discount Window



7. In the Select Discount window, follow these steps:
 - a. Click a discount name shown in the Available Discounts list to select it. The discount name is highlighted.
 - b. Verify that you are selecting the appropriate discount by viewing the text shown in the Description text area.
 - c. If desired, enter an explanation for the discount in the Discount Explanation field.
 - d. Click OK. The Select Discount window closes. The discount name appears in place of the generic [Discount] hyperlink, and if you specified a discount explanation, the discount explanation appears in place of the generic [Explanation] hyperlink in the Action portion of the New Discount Action window.

Note: The discount explanation may be displayed to customers receiving the discount, if your technical staff chooses to use it. For more information about discount explanations, see “Uses of Discounts” on page 8-2.

8. If desired, click the check box located at the bottom of the New Discount Action window to run the scenario only once per visitor.
9. Click OK. The New Discount Action window closes. The conditions and corresponding actions you selected appear beneath the scenario name (and if applicable, customer segments) in the Scenarios list.

Note: You may add different types of scenario actions to your scenario. For example, you may now want to add an ad or e-mail action to the same scenario where you just added the discount action. You may also choose to add another discount action to the same scenario. (Whether you do so or not depends upon whether you want to target the same segments that are specified in this scenario.)

Tip: If you would like to start with a copy of an existing scenario action, click an existing scenario action in the Scenarios list to select it and then click Duplicate. A copy of the scenario action appears in the Scenarios list. You can then click Edit to modify the scenario action as appropriate.

10. If desired, click the downward facing arrow on the Scenarios bar to close the Scenarios bar.

E-mail Actions

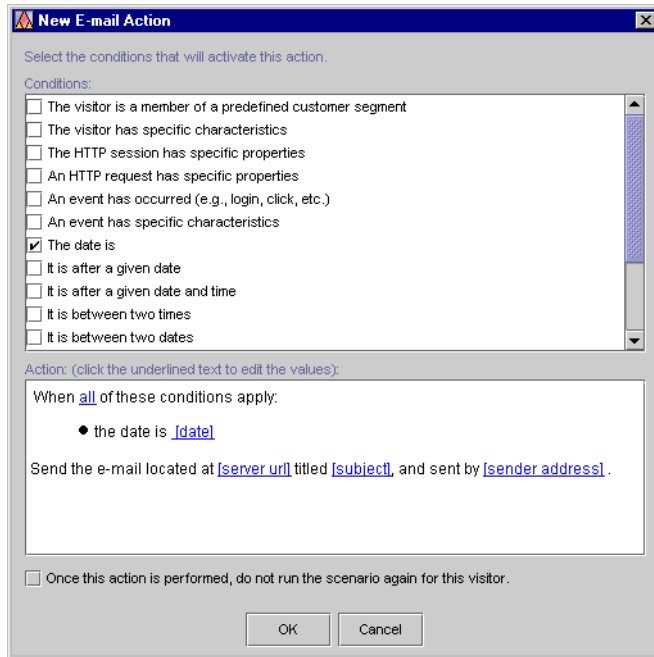
Notes: As part of specifying an e-mail action, you will need to reference a previously developed e-mail message. Be sure that you have already developed some e-mail messages, as explained in “Authoring E-mails” on page 10-11.

When you specify e-mail actions, remember that e-mails will *only* be sent to those customers who visit your Web site, meet the conditions you specify for the action, and have not chosen to opt out of receiving e-mails.

To add e-mail actions to your scenario, follow these steps:

1. Click the name of the scenario in the list to select it. The scenario is highlighted and the buttons on the Scenarios pane are enabled.
2. Using the New Action button, select E-mail. The New E-mail Action window appears, as shown in Figure 11-17.

Figure 11-17 New E-mail Action Window



3. Click the check boxes shown in the Conditions portion of the New E-mail Action window to select the condition(s) under which the e-mail will be sent. Text describing the conditions you selected appear in the Action portion of the New E-mail Action window.

Note: You must add at least one condition, or you will not be able to save the scenario action. For an explanation of the possible conditions, see “Listing of the Available Conditions” on page 3-2.

Tip: You can use conditions in ways that always evaluate to true. For example, you can select the It Is after a Given Date condition and then specify the date as January 1, 1970.

4. For each condition you selected in step 3, you must specify values for any bracketed hyperlinked text that appears in the Action portion of the window.

For example, if you selected The Date Is condition as shown in Figure 11-17, you must specify a value for the hyperlinked [date] text in The Date Is [Date]

condition statement, shown in the Action portion of the New E-mail Action window.

To specify values for bracketed hyperlinked text, just click the text. Depending upon the condition and the hyperlink, a window or a dialog box opens. Table 11-3 provides a consolidated listing of the conditions and indicates where to look if you need detailed instructions for any of the corresponding windows/dialog boxes.

Note: Table 11-3 shows all the conditions that may be used within the E-Business Control Center. Therefore, not all conditions shown here may apply.

Table 11-3 Instructions for Building Conditions

Condition(s)	Relevant Instructions
The visitor is a member of a predefined customer segment	“Using the Select Customer Segments Window” on page 3-4
A visitor, HTTP session, HTTP request, or an event has specific characteristics	“Using the Properties and Property Values Windows” on page 3-5
An event (such as login or click) has occurred.	“Using the Select Events Window” on page 3-9
Dates and times	“Using the Date/Time Entry Dialog Boxes” on page 3-10
There is a specific item in the shopping cart, there is an item from a given category in the shopping cart, the value of items in the cart is a certain amount	“Using the Quantity Selector or Currency Selector Dialog Boxes” on page 3-11 “Using the Select Operator Dialog Box” on page 3-12 “Using the Enter SKU Numbers or Enter Categories Windows” on page 3-13
A random number falls within a given range	“Using the Enter a Range Dialog Box” on page 3-14

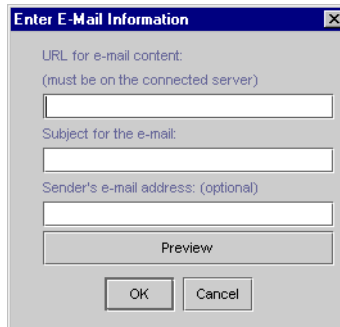
- If you selected more than one condition in step 3, you may want to click the All hyperlink in the When All Of These Conditions Apply phrase to change All to Any.

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Note: The Any/All link acts as a toggle. Clicking on Any will change it to All, and visa versa.

6. Click the [Server URL], [Subject], or [Sender Address] hyperlink. The Enter E-mail Information dialog box opens, as shown in Figure 11-18.

Figure 11-18 Enter E-mail Information Dialog Box



7. In the Enter E-mail Information dialog box, follow these steps:
 - a. Enter a valid server URL, subject of the e-mail, and if desired, the sender's e-mail address into the appropriate fields.
 - b. If desired, click Preview to see a preview of the e-mail. Enter a user ID when prompted, then click OK. (The user ID is used to show a personalized version of the e-mail, and is inserted where the customer's real user ID would typically appear.) A preview of the e-mail will be displayed in your Web browser. When finished previewing the e-mail, close your Web browser.
 - c. Click OK. The Enter E-mail Information dialog box closes, and the server URL, subject, and sender e-mail address (if applicable) appears in place of the generic hyperlinks in the Action portion of the New E-mail Action window.
8. If desired, click the check box located at the bottom of the New E-mail Action window to run the scenario only once per visitor.

For example, if you wanted a given customer to receive only one e-mail, regardless of how many times that customer entered the site or matched the relevant conditions, you would check this option.

9. Click OK. The New E-mail Action window closes. The conditions and corresponding actions you selected appear beneath the scenario name (and if applicable, customer segments) in the Scenarios list.

Note: You may add different types of scenario actions to your scenario. For example, you may now want to add an ad or discount action to the same scenario where you just added the e-mail action. You may also choose to add another e-mail action to the same scenario. (Whether you do so or not depends upon whether you want to target the same segments that are specified in this scenario.)

Tip: If you would like to start with a copy of an existing scenario action, click an existing scenario action in the Scenarios list to select it and then click Duplicate. A copy of the scenario action appears in the Scenarios list. You can then click Edit to modify the scenario action as appropriate.

10. If desired, click the downward facing arrow on the Scenarios bar to close the Scenarios bar.

Save Your Promotional Campaign

Note: If you have specified all the required information for your campaign, saving the campaign will make that campaign active on the server to which you are connected. (In other words, that campaign will be ready to run between the start/stop times you specified and when the appropriate conditions are met.) If you have not specified all the required information, you will receive a notice indicating that the campaign will not do anything, but you will still be able to save it and return to it later.

If you have just created a new campaign and want to save it, follow these steps:

1. From the BEA E-Business Control Center File menu, select Save. The Save Campaign dialog box opens, as shown in Figure 11-19.

Figure 11-19 Save Campaign Dialog Box



2. Enter a filename for the campaign in the field. The filename should start with a letter or underscore, contain only letters, digits, underscores, hyphens and periods. It should not contain spaces nor be the reserved name `defaultID`.
3. Click Save. The campaign is saved, and the name of the campaign appears in the Campaigns view of the Explorer window.

Locating Existing Campaigns

If you have defined many campaigns, it can be time consuming to locate a particular campaign simply by looking in the Campaigns list. Therefore, the E-Business Control Center provides you with a mechanism that allows you to filter existing campaigns by name, and a search function that allows you to locate campaigns using information you provided during the campaign creation process. Additionally, scenario views can help you quickly locate particular scenarios and scenario actions within your campaigns.

This section includes the following information:

- Using the Name Filter to Locate Campaigns
- Searching for Promotional Campaigns
- Switching Between Scenario Views

Using the Name Filter to Locate Campaigns

To locate an existing campaign using the name filter, follow these steps:




1. Click  (located on the left side of the Explorer window) to enable the Campaigns view. A list of campaigns appears in the Campaigns list.
2. In the Name Filter field (shown in Figure 11-20), type the name of the campaign you want to locate.

Figure 11-20 Name Filter Field



Note: You can type full or partial names into the Name Filter field. Campaign names are case sensitive. Therefore, filtering based on the text “Sale” will not locate campaigns with names that start with “sale.”

3. Click the Filter icon () to filter the campaigns shown in the Campaigns list. The campaigns that have names beginning with the text you entered appear in the Campaigns list.

Note: To return to the full list of campaigns, click the Show All Objects icon ().

Searching for Promotional Campaigns

To locate an existing campaign using the search function, follow these steps:


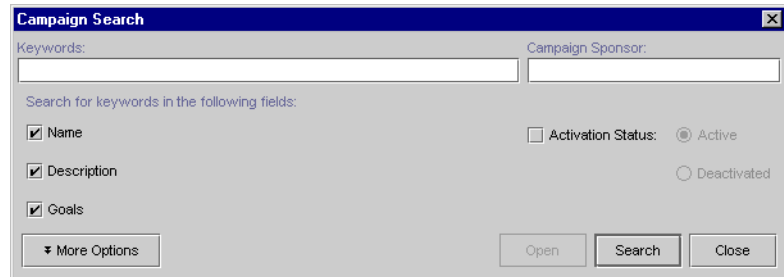
1. Click the Search icon () shown in the Explorer toolbar. The Campaign Search window opens, as shown in Figure 11-21.

Figure 11-21 Campaign Search Window



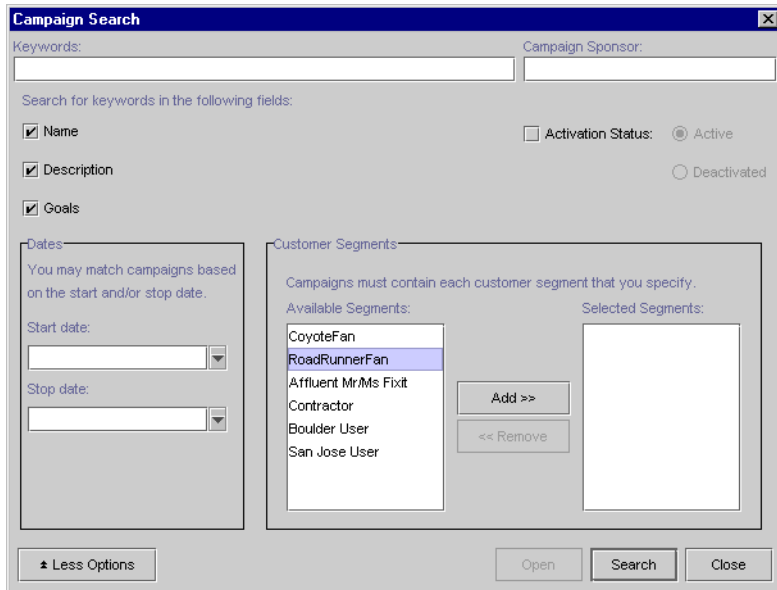
Note: The Search function only works to locate campaigns. It does not allow you to search for other objects, such as customer segments or discounts.

2. Enter the keywords for the search in the Keywords field.
3. If desired, enter the name of the sponsor for the campaign in the Campaign Sponsor field.
4. Click the Name, Description, and/or Goals check boxes, as appropriate, to restrict or expand your search to these informational areas.
5. If desired, click the Activation Status check box, and search for the campaign based on whether it is active or deactivated.

Note: Remember that an active campaign is ready to run, but will only run between the start/stop times you specified and when the appropriate conditions are met. Therefore, searching for an active campaign may not necessarily mean you are searching for a campaign that is running.

6. If desired, click More Options to view more search options. The expanded Campaign Search window appears, as shown in Figure 11-22.

Figure 11-22 Expanded Campaign Search Window



- a. In the Dates portion of the window, enter the start and/or stop date for the campaign, or use the drop-down lists to activate the calendar. (Just click a date to select it.)
- b. In the Customer Segments portion of the window, click a segment in the Available Segments list to select it, then click Add. The segment moves to the Selected Segments list.

Notes: If you specify customer segments as part of the search criteria, the search function will locate only campaigns that have those segments specified at the scenario level. If a campaign has the segments specified at the scenario action level instead, the campaign will not be retrieved as a match. For more information about the differences between specifying customer segments at the scenario and scenario action levels, see “Customer Segments in Scenarios and Actions” on page 10-19.

If you make a mistake and want to remove the customer segment, click the segment shown in the Selected Segments list to select it, then click Remove.

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7. Click Search. If any campaigns matching your criteria are found, they are displayed in the bottom portion of the Campaign Search window, as shown in Figure 11-23.

Figure 11-23 Campaign Search Results

Name	Description	Goals	Sponsor	Start Date	Stop Date	Ac
Tour Campaign 1	The tour campaign displays ...		BEA Systems	1/1/01	12/31/20	

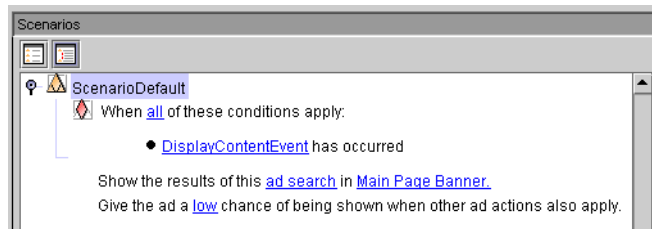
8. If desired, click a campaign name in the results list to select it, then click Open to open the campaign in the Campaign Editor.
9. To close the Campaign Search window, click Close.


Switching Between Scenario Views

After you define the scenarios within your campaign, you may want to vary the amount of information displayed in the Scenarios pane. To do this, you can use the icons on the Scenarios pane to change the view from detailed to summary, and visa versa.

Once you have added actions to your scenarios, the scenario is displayed in the detail view. The detail view displays the name of your scenarios, and all of their associated conditions and actions. Figure 11-24 shows a scenario in detail view.

Figure 11-24 Detail View




To view the details of your scenarios in the Scenarios pane, click the Detail View icon ().

If you have many scenarios within your campaign, you may want to display just a summary of those scenarios, using the summary view. The summary view displays just the name of your scenarios. Figure 11-25 shows the same scenario as Figure 11-24, but in a summary view.

Figure 11-25 Summary View

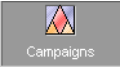


To view a summary of your scenarios in the Scenarios pane, click the Summary View icon ().

Modifying Existing Campaigns


The E-Business Control Center also allows you to view and modify existing campaigns. After you modify an active campaign, you also have the opportunity to reset aspects of the campaign, such as removing previously placed ads, clearing counts of ad impressions and clickthroughs, resetting scenarios that are set up to run once per visitor, and clearing pending e-mails.

To open an existing campaign for modification, follow these steps:

1. If necessary, switch to the Campaigns view by clicking  (located on the left side of the Explorer window) to enable the Campaigns view. A list of campaigns appears in the Campaigns list.
2. Click the name of the campaign you want to modify. The campaign is highlighted.


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Tip: If there is a long list of campaign names, you might want to use the name filter or the search function to locate the campaign you want to modify. For more information about these options, see “Locating Existing Campaigns” on page 11-26.

3. Click the Open icon () shown on the Explorer toolbar. The Campaign Editor window opens.

Tip: You can also open the campaign by double-clicking on the campaign name.

4. You can now modify any part of the campaign. Follow the same instructions for creating a new campaign, starting from “Specify General Campaign Information” on page 11-3. If you are interested in suspending an active campaign or reactivating a suspended campaign, see “Deactivating and Reactivating Campaigns” on page 11-33.
5. Be sure to save your modifications by selecting Save from the BEA E-Business Control Center File menu.

Tip: You can also click the Save icon () shown on the BEA E-Business Control Center toolbar to save the campaign.

6. After you modify your campaign and click Save, the Reset Campaign States dialog box appears, as shown in Figure 11-26.

Figure 11-26 The Reset Campaign States Dialog Box



If you want to reset aspects of the campaign, select the appropriate check boxes and click OK.

Warning: If the campaign you modify is in an active state, saving modifications to the campaign may immediately affect your Web site. Be certain that the modifications you make are in line with your e-marketing strategy and that you entered the modifications correctly in the E-Business Control Center.

Deactivating and Reactivating Campaigns

Once campaigns are saved, they are considered active. (In other words, the campaign will be ready to run between the start/stop times you specified and when the appropriate conditions are met.) If for some reason you want to disqualify an active campaign from running or stop a running campaign prior to the specified stop date (or before end goals are reached, if your campaign contains them), check the Deactivate This Campaign check box located in the Start/Stop pane. The next time you save the campaign, it will be deactivated. In the Campaign list of the Explorer window, deactivated campaigns are displayed in a lighter color.

If at any time you want to reactivate a campaign, simply return to the Start/Stop pane and check the Deactivate This Campaign check box again to remove the check mark. The next time you save the campaign, it will be reactivated. A campaign that is reactivated is once again ready to run between the start/stop times you specified and when the appropriate conditions are met.



Deleting Existing Campaigns

You can also delete existing campaigns using the E-Business Control Center.

Warning: As with any deletion you make, be absolutely certain that you select the correct campaign and that you are sure you want to delete it. Deleted campaigns cannot be retrieved.

To delete an existing campaign, follow these steps:

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1. If necessary, switch to the Campaigns view by clicking  (located on the left side of the Explorer window) to enable the Campaigns view. A list of campaigns appears in the Campaigns list.
2. Click the name of the campaign you want to delete. The campaign is highlighted.
Tip: If there is a long list of campaign names, you might want to use the name filter or the search function to locate the campaign you want to delete. For more information about these options, see “Locating Existing Campaigns” on page 11-26.
3. To delete the campaign, click the Delete icon () on the Explorer toolbar.

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