

## Search rules

What this exercise is about .....	2
What you should be able to do .....	2
Introduction .....	2
Requirements .....	2
Part 1: Preview the store .....	3
Part 2: Create a new search rule for coffee .....	7
Part 3: Create a new search rule for tables .....	12
Part 4: Test your search rules .....	16
Part 5: What you did in this exercise .....	20

## What this exercise is about

In this tutorial, you will act as a Marketing Manager to set up a search rule to ensure search results are aligned with other store marketing activity. There are currently store promotions and advertising around Sharpson coffee makers and selected furniture. You want to ensure that customers can easily find the promoted products in their search results.

This tutorial should take approximately 30 min to complete.

## What you should be able to do

After completing this exercise, you should be able to:

- Create and manage search rules in the Marketing tool
- Adjust search results by creating business rules in the search rule builder
- Understand how each of the new search actions is used to modify results

## Introduction

The following naming conventions are used in the exercises:

Reference Variable	Description
<WCDE_INSTALL_DIR>	WebSphere Commerce Developer installation directory
<WC_HOST>	Hostname for WebSphere Commerce. For WebSphere Commerce Developer you can use <b>localhost</b> .

## Requirements

Before beginning this lab, ensure you have:

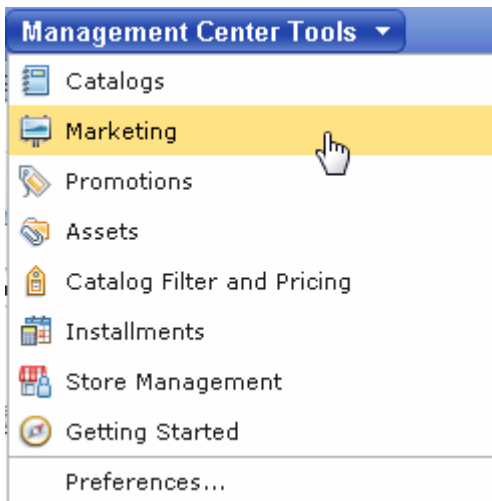
- Installed WebSphere Commerce V7 Fix Pack 2
- Installed WebSphere Commerce V7 Feature Pack 2
- Completed WebSphere Commerce search configuration

---

## Part 1: Preview the store

In this section, you will preview the Madisons store to see how well the search results coordinate with your overall marketing plan for patio furniture.

- \_\_\_ 1. Start your WebSphere Commerce application or test server.
- \_\_\_ 2. Launch the Management Center Marketing tool.
  - \_\_\_ a. Launch Management Center using the URL **https://<WC\_HOST>:8000/lobtools**.
  - \_\_\_ b. Open the **Marketing** tool.




- \_\_\_ c. Select the **Madisons** store.

---

Note: This lab uses the store name **Madisons** to refer to the starter store where WebSphere Commerce search is configured. Your store name might differ.


---





- \_\_\_ 3. Preview the Madisons store.
  - \_\_\_ a. Select the store preview button  from the toolbar.
  - \_\_\_ b. The Madisons store information is selected by default. Click **Launch Store Preview** to view the store.

\_\_ c. The e-Marketing Spot at the top of the page is promoting Sharpson coffee makers.



\_\_ d. Scroll down on the home page. Notice the Deals of the Week ad highlighting several furniture items.

Deals of the Week Subscribe 

			
Patio Set	Rattan Chair	Garden Arbor	Snack Table
<del>\$300.00</del> \$259.99	<del>\$75.00</del> \$69.99	<del>\$240.00</del> \$199.99	<del>\$180.00</del> \$169.99
<a href="#">Add to Cart</a>	<a href="#">Add to Cart</a>	<a href="#">Add to Cart</a>	<a href="#">Add to Cart</a>









- e. Search for the term **coffee**. Only a few Sharpson products appear on the first page of the results and the featured coffee makers are on page 2.

### Search Results

Your search for **coffee** produced **31** results.

Displaying products 1 - 12 of 31 < 1 - 3 >

Search indexing is currently idle. Sort By: No Sort

 <b>Coffee</b> and Espresso Bar \$499.95 <a href="#">Add to Cart</a>	 Stay or Go <b>Coffee</b> Maker \$89.99 <a href="#">Add to Cart</a>	 Gold Stainless Steel <b>Coffee</b> Tumbler \$19.99 <a href="#">Add to Cart</a>	 Sharpson <b>coffee</b> filter \$9.99 <a href="#">Add to Cart</a>
 Sharpson 10 cup <b>Coffee</b> Maker	 Jump-Start-Your-Morning <b>Coffee</b> Bundle	 Two-Drawer <b>Coffee</b> Table	 Sharpson Aroma Express <b>Coffee</b> Maker









- \_\_\_ f. Search for the term **table**. You notice that table glasses are taking up many of the top result spots and are ranked ahead of the featured snack table. Also, the featured patio set is missing from the search results.

### Search Results

Your search for **table** produced **19** results.

Displaying products 1 - 12 of 19    < 1 - 2 >

Search indexing is currently idle.    Sort By: **No Sort**

 <b>"Hawthorne" Table Glasses.</b>  \$9.99 <a href="#">Add to Cart</a>	 <b>"Somerville" Table Glasses</b>  \$4.79 <a href="#">Add to Cart</a>	 <b>Side Table</b>  <del>\$189.00</del> \$69.99 <a href="#">Add to Cart</a>	 <b>"Milton" Table Glasses</b>  \$5.99 <a href="#">Add to Cart</a>
 <b>"Terrace" Table Glasses</b>	 <b>Snack Table</b>	 <b>Modern Occasional Table</b>	 <b>Mocha Linen Table Lamp</b>

- \_\_\_ 4. Close the store preview window.


## Part 2: Create a new search rule for coffee

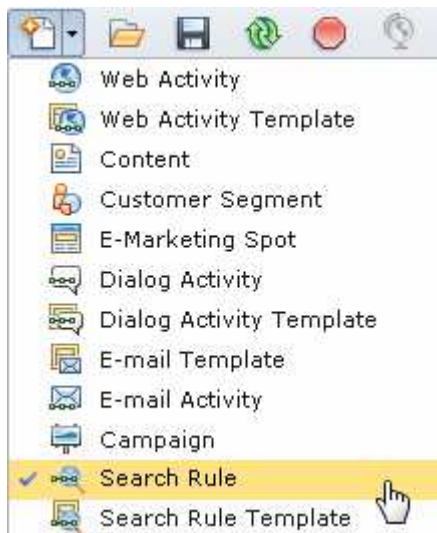
In this part of the lab, you will create a search rule to ensure the Sharpson products are ranked highly in the search results for most shoppers. Your marketing research has indicated that customers who subscribe to financial newsletters are more likely to buy higher end merchandise. You will adjust the search rule to promote more exclusive products to these shoppers. You can find more information on search rules in the Information Center at **Operating > IBM Management Center for WebSphere Commerce > Marketing tool > Working with search rules.**

Direct link: <http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com.ibm.commerce.management-center.doc/tasks/tsbsearchsupert.htm>

\_\_\_ 1. Return to the **Marketing** tool in Management Center.

\_\_\_ 2. Open the Search Rule Builder.

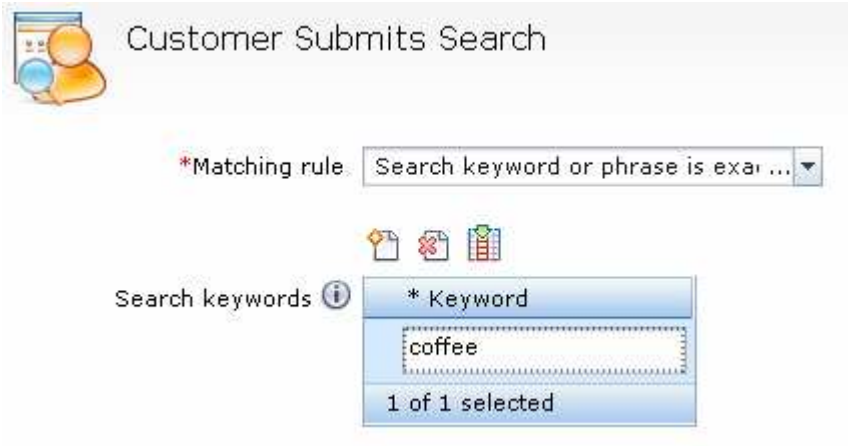
\_\_\_ a. Select **Search Rule** from the **Create New** toolbar button  and choose the **Change Search Result Order** template.




\_\_\_ 3. On the Search Rule General Properties tab, name your rule **Coffee ranking**.

- \_\_\_ 4. Click the **Customer Submits Search** trigger to display its property panel. Enter the property values shown in the table. When you are finished the property pane should look like the screen capture below.

Field	Value
Matching rule	Search keyword or phrase is exactly one of the following values
Search keywords	coffee



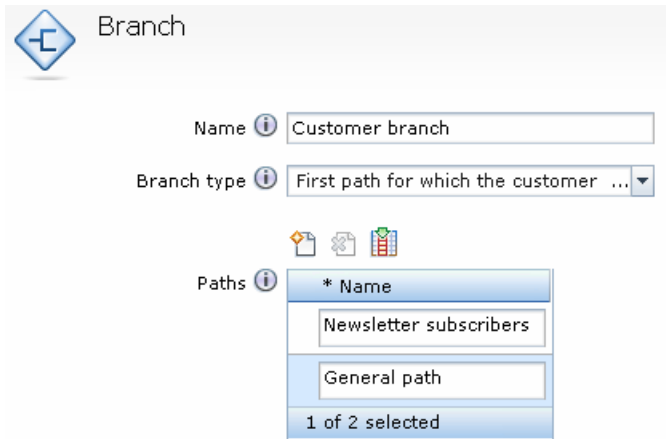
- \_\_\_ 5. Add a branch to create a path for shoppers purchasing financial newsletters and a path for all other shoppers.

- \_\_\_ a. Add a branch element  following the **Customer Submits Search** trigger.
- \_\_\_ b. Click the **Branch** to display its property panel.




\_\_\_ c. Enter the property values shown in the table. When you are finished the property panel should look like the screen capture below.

Field	Value
Name	Customer branch
Paths – first value	Newsletter subscribers
Paths – second value	General path




\_\_\_ 6. Add a target to check for customers ordering a newsletter.

\_\_\_ a. Add the **Shopping Cart** action  to the beginning of the **Newsletter subscribers** path.


\_\_\_ b. Click the **Shopping Cart** target to display its property panel.




\_\_\_ c. From the **Shopping cart contents** drop down, select **Catalog entries from specific categories**.


\_\_\_ d. In the **Find and Add** field, enter **Newsletters**. When you are finished the property panel should look like the screen capture below.


 Shopping Cart

Shopping cart contents:

Target customers 
 Who have catalog entries from any of the following categories and satisfy the followi  
 Who have catalog entries from all of the following categories and satisfy the followi  
 Who do not have catalog entries from any of the following categories or who do not :


  

*Categories	* Type	* Name	Description
		Newsletters	Find newsletters on business, technology, personal finance and the financial industry.
0 of 1 selected			

Number of catalog entries 


\*Number







Value of catalog entries









Time frame 

\_\_\_ 7. Rank the search results.

\_\_\_ a. Select the **Change Search Result Order** action in the **Newsletter subscribers** path.

\_\_\_ b. Click the  button to add new ranking criteria for manufacturer name. Shoppers purchasing a newsletter will see the more exclusive Kitchen's Best products ranked highest in their search results.

-  Manufacturer name 
-  Part number
-  Manufacturer part number
-  Catalog entry type
-  Name
-  Short description
-  Category

\_\_\_ c. Enter the property values shown in the table. When you are finished the property panel should look like the screen capture below.

Field	Value
Boost factor	1.5
Matching rule	Matches
Value	Kitchen's Best

**Change Search Result Order**

Action  Change how initial search results are ranked  
 Change how initial search results are sorted

Ranking criteria

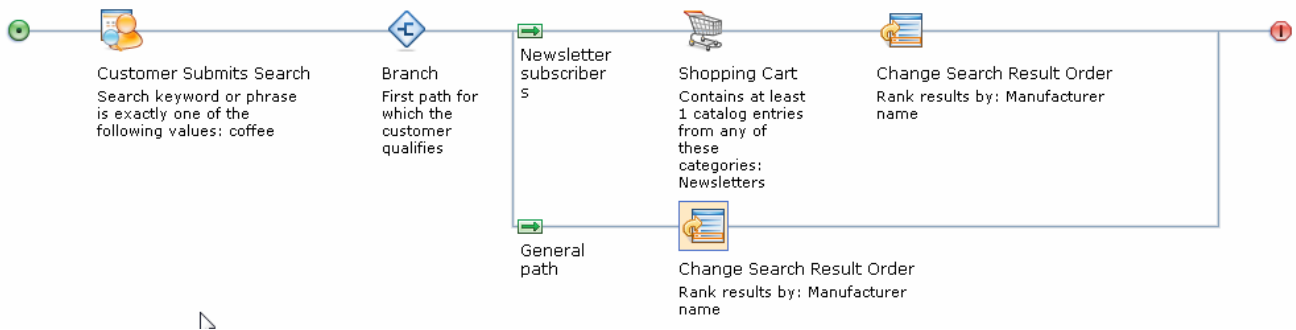
* Boost factor	* Name	* Matching rule	* Value
1.5	Manufacturer name	Matches	Kitchen's Best

1 of 1 selected

\_\_\_ d. Select the **Change Search Result Order** action in the **General path**.

\_\_\_ e. For shoppers not purchasing a newsletter, the Sharpson products should be ranked highest. Repeat steps b. and c. above to add ranking criteria for **Sharpson**.

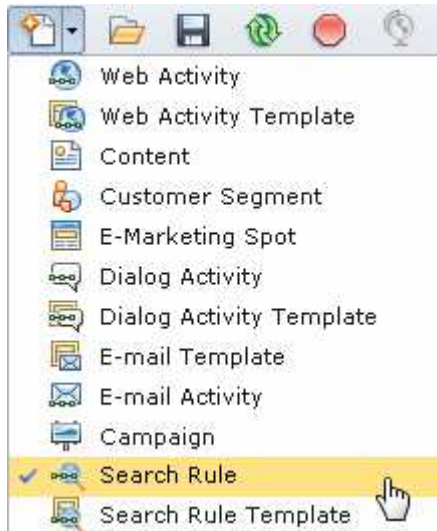
\_\_\_ 8. The completed search rule should look like this. Click **Save and Close** to save the search rule.



## Part 3: Create a new search rule for tables

In this part of the lab, you will create a search rule to ensure shoppers can easily find featured furniture using the store search. It is unlikely your customers are looking for drinking glasses when they search on the term **table**. To make the results more meaningful, you will filter out the results for glasses so furniture matches are more prominently displayed. You will also ensure that the featured patio set is included in the search results.

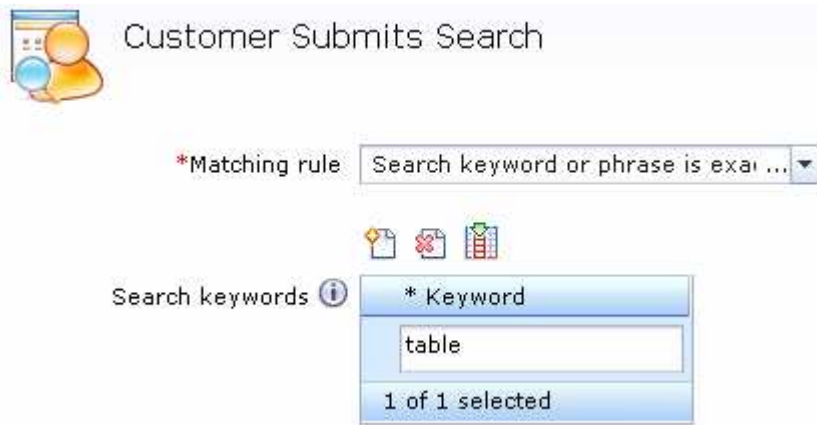
- \_\_\_ 1. Create a second Search Rule.
  - \_\_\_ a. Select **Search Rule** from the **Create New** toolbar button and choose the **Specify Top Search Results** template.





- \_\_\_ 2. On the Search Rule General Properties tab, name your rule **Table ranking**.

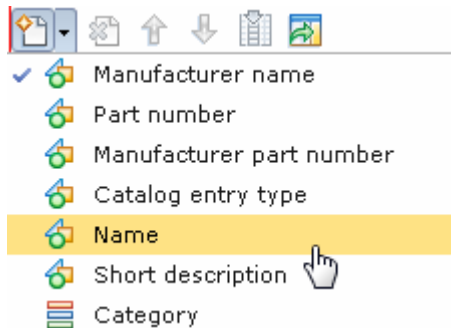
3. Click the **Customer Submits Search** trigger to display its property panel. Enter the property values shown in the table. When you are finished the property pane should look like the screen capture below.

Field	Value
Matching rule	Search keyword or phrase is exactly one of the following values
Search keywords	table



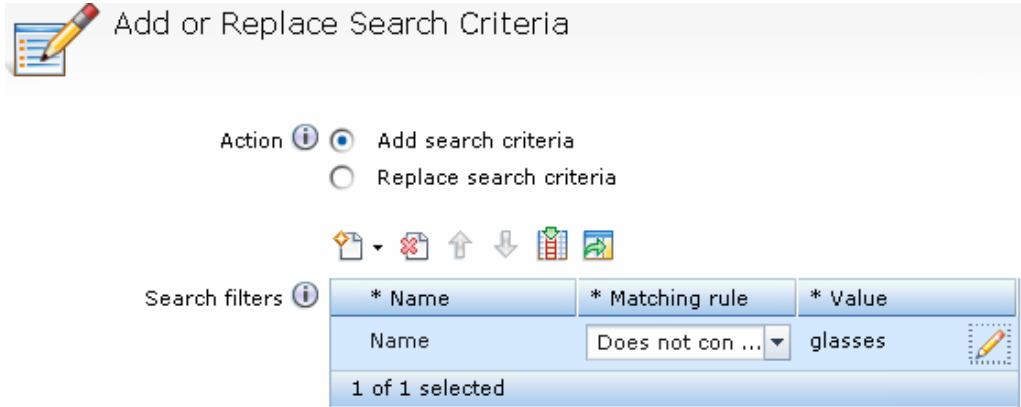
4. Create a filter to remove unwanted search results. This action will remove the table glasses from the search results.

- a. Add the **Add or Replace Search Criteria**  action to the search rule following the **Customer Submits Search** trigger.
- b. Click the **Add or Replace Search Criteria** action to display its property panel.
- c. Leave the **Add search criteria** radio button selected.
- d. Click the button  to add a new search filter for product name.










- \_\_\_ e. Enter the property values shown in the table. When you are finished the property panel should look like the screen capture below.


Field	Value
Matching rule	Does not contain any of
Value	glasses




**Add or Replace Search Criteria**

Action   Add search criteria  
 Replace search criteria

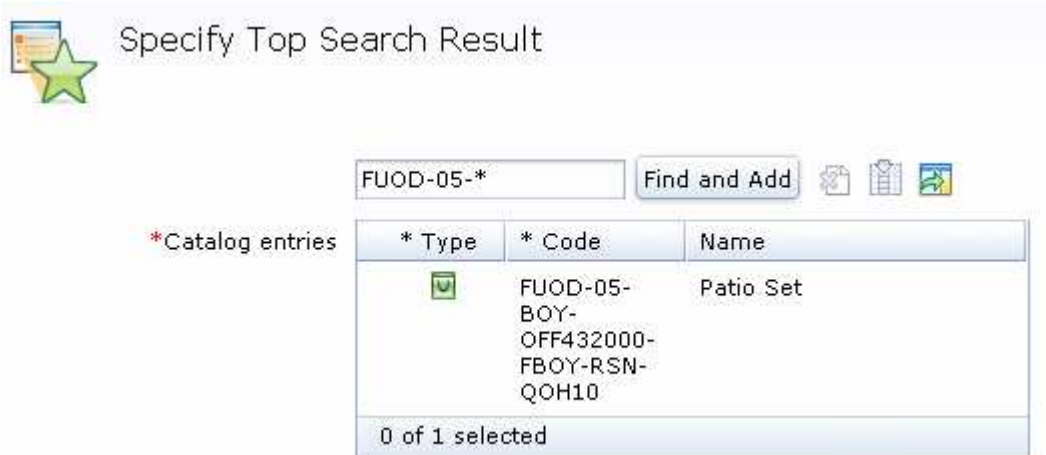
Search filters 

* Name	* Matching rule	* Value
Name	Does not con ...	glasses






1 of 1 selected


- \_\_\_ 5. Add the featured patio set to the top of the search results.
- \_\_\_ a. Click the **Specify Top Search Result** action to display its property panel.
- \_\_\_ b. In the **Find and Add** field, enter the patio set. The SKU value to add is **FUOD-05-\***. When you are finished, the property panel should look like the screen capture below.



**Specify Top Search Result**

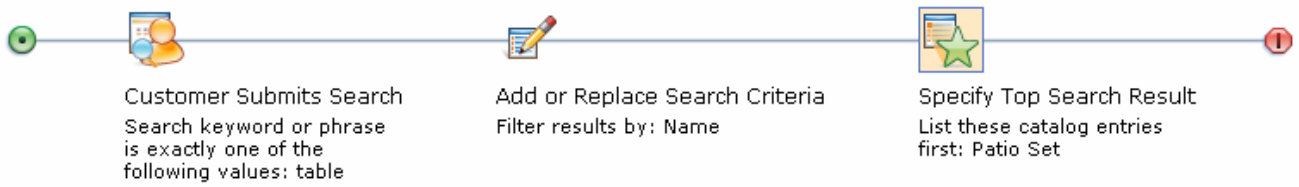
FUOD-05-\*    

\*Catalog entries

* Type	* Code	Name
	FUOD-05-BOY-OFF432000-FBOY-RSN-QOH10	Patio Set

0 of 1 selected

\_\_\_ 6. The completed search rule should look like this. Click **Save and Close** to save the search rule.




\_\_\_ 7. Activate the new search rules.

- \_\_\_ a. Select **Search Rules** from the Explorer view to list all rules.
- \_\_\_ b. Right click the **Table ranking** rule and select **Activate**.
- \_\_\_ c. Right click the **Coffee ranking** rule and select **Activate**.

## Part 4: Test your search rules

In this section, you will test your new search rules in the Madisons store using the store preview. Store preview allows you to test out your search rules in the store and use the e-Marketing Spot inspection capability to view the search rule that is applied.

\_\_\_ 1. Preview the Madisons store.

- \_\_\_ a. Select the store preview button  from the toolbar.
- \_\_\_ b. The Madisons store information is selected by default. Click **Launch Store Preview** to view the store.

\_\_\_ 2. Test your coffee ranking search rule.

- \_\_\_ a. Search for **coffee**. The Sharpson products are now prominently displayed at the top of the search results.
- \_\_\_ b. Select the Show Marketing Spots button from the store preview details section at the top of the page

Store Preview [Hide Details](#)


**Preview start date and time** : 2010/12/03 05:13:11 PM Eastern Time  
**Product recommendations:** using inventory levels from database  
**Time is not elapsing in the preview.**









[Show Marketing Spots](#)

### Search Results

Your search for **coffee** produced 31 results.

Displaying products 1 - 12 of 31 [◀ 1 - 3 ▶](#)

 Search indexing is currently idle. Sort By: [No Sort](#)

 Sharpson <b>coffee</b> filter  \$9.99 <a href="#">Add to Cart</a>	 Sharpson 10 cup <b>Coffee</b> Maker  \$39.99 <a href="#">Add to Cart</a>	 Sharpson Aroma Express <b>Coffee</b> Maker  \$19.99 <a href="#">Add to Cart</a>	 Sharpson SmartBrew <b>Coffee</b> Maker  \$14.99 <a href="#">Add to Cart</a>
 Sharpson 12 cup, programmable, Salmon	 Sharpson 12 cup, programmable, Green	 Sharpson 12 cup, programmable, Violet	 Sharpson 12 cup, programmable, Black



- c. Select the blue icon in the top right of the search results area to view the search rule details. Here you can see that the 'General path' of your search rule was run. You can also view the full search query expression.

The screenshot shows a window titled "Search Rule" with a close button in the top right corner. The main content area is titled "Search rule summary: coffee". Below this title is a table with the following columns: Name, Priority, Start Date, and End Date. The table contains one row: "Coffee ranking" with a priority of "0". Below the table, there is a text area containing the following information:
 

- Customer Submits Search Trigger - Customer searches for exactly one of: "coffee" ✓ Entered branch "Customer branch" of type "First path for which the customer qualifies". Entered path "Newsletter subscribers".
- Evaluate the target "Shopping Cart - Catalog Entries from Categories".**
- Order has quantity 0.0 of "Newsletters". The check evaluated to false.
- The target evaluated to false.
- Entered path "General path".
- Perform action "Order Search Results".**

 Below this text area, it says "Search indexing is currently idle." and then "Search query expression". The search query expression is a complex URL-encoded string:
 

```
q=+(+(name:(coffee) defaultSearch:(coffee) shortDescription:(coffee))) (mfName_ntk:"Sharpson" ^1.5)
&fq=catalog_id:10001&fq=storeent_id:(10001)&fq=published:1&fq=-
catentype_id_ntk_cs:ItemBean&start=0&rows=12&timeAllowed=3000&hl.fl=name&hl.fl=shortDescription&hl=true&hl.simple.pre=
<strong><span
class=font2>&hl.simple.post=</span></strong>&hl.requireFieldMatch=true&facet.field=mfName_ntk_cs&facet.field=parentCatgr
oup_id_facet&facet=true&facet.query=price_USD:({* 100} 100)&facet.query=price_USD:({100 200} 200)
&facet.query=price_USD:({200 300} 300)&facet.query=price_USD:({300 400} 400)&facet.query=price_USD:({400 500} 500)
&facet.query=price_USD:({500 *})
&facet.sort=count&facet.mincount=1&facet.limit=10&spellcheck.count=5&spellcheck=true&spellcheck.collate=false&debugQuery=
true&fl=score
```

- d. Close the search rule details window.

3. Optional: Select **See All > Newsletters** and add any product from the Newsletters category to your shopping cart. Search for **coffee** again. This time the Kitchen's Best products rank the highest.



### Search Results

Your search for **coffee** produced **31** results.

The search results page displays 12 products in a grid. At the top, it says 'Displaying products 1 - 12 of 31' and 'Search indexing is currently idle.' The 'Sort By' dropdown is set to 'No Sort'. Each product card includes an image, a name with 'Coffee' in bold, a price, and an 'Add to Cart' button.

Product Name	Price
Stay or Go <b>Coffee</b> Maker	\$89.99
Digital 12 cup <b>Coffee</b> Maker, Red	\$99.99
Digital 12 cup <b>Coffee</b> Maker, Green	\$99.99
Digital 12 cup <b>Coffee</b> Maker, Blue	\$99.99
8 cup Drip <b>Coffee</b> Maker	
Thermal 10 cup Auto <b>Coffee</b> Maker	
KB-03 Espresso Machine	
Stainless Steel 10 cup Thermal Carafe	

\_\_\_ 4. Test your table ranking search rule.

\_\_\_ a. Search for **table**. The drinking glasses should be gone from the search results making the table results easier to see. The featured patio set is displayed at the top of the search results.









### Search Results

Your search for **table** produced **15** results.

Displaying products 1 - 12 of 15 ◀ 1 - 2 ▶

💡 Search indexing is currently idle.

Sort By:

 Patio Set \$259.99 <a href="#">Add to Cart</a>	 Side <b>Table</b> \$69.99 <a href="#">Add to Cart</a>	 Snack <b>Table</b> \$169.99 <a href="#">Add to Cart</a>	 Brown Linen <b>Table</b> Lamp \$79.99 <a href="#">Add to Cart</a>
 Modern Occasional <b>Table</b>	 Mocha Linen <b>Table</b> Lamp	 Beige Linen <b>Table</b> Lamp	 Craft <b>Table</b>

---

## Part 5: What you did in this exercise

In this tutorial you learned how to use the new search rule builder in the Marketing tool.

You should now understand how to complete the following tasks:

- Create and manage search rules in the Marketing tool
- Adjust search results by creating business rules in the search rule builder
- Understand how each of the new search actions is used to modify results