IBM Software Group

WebSphere Commerce V7.0

Promotion enhancements

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This presentation introduces promotion enhancements in WebSphere® Commerce version 7.

Goals

- To understand the changes made to the Promotions tool to improve usability

- To understand the new promotions and promotion features available

At the end of this presentation, you should understand the changes made to the Management Center Promotions tool to improve usability. You should also understand the new promotions available and the new promotion features.

Agenda

- Overview

- Tool improvements

- New promotion types

- New promotion features

- Best deal support

- Limitations

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This presentation begins with an overview of changes to the promotions capability in WebSphere Commerce. It then introduces Management Center Promotions tool improvements, new promotion types and new promotion features. Best deal support is then discussed. The presentation concludes with a summary of promotion limitations.

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Overview

- Improved usability of the Promotions tool

- More flexibility in promotion options

- Improved shopping experience

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The enhancements to promotion capability in version 7 are in three main areas. The first is improved usability of the Promotions tool itself. The second is new promotion capability. The new promotion types and features mean that even more of the runtime promotion capability is now enabled for the Management Center UI. The third enhancement area is an improved shopping experience for customers.

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Tool improvements

- Administrative name
  - Can be modified
  - Unique within the store

- Support for inherited sales catalog
  - Promotions can target inherited catalog entries and categories

- Unique promotion priority
  - Set in wc-component.xml

- Accelerator does not show promotions managed by Management Center

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Promotion enhancements   © 2009 IBM Corporation

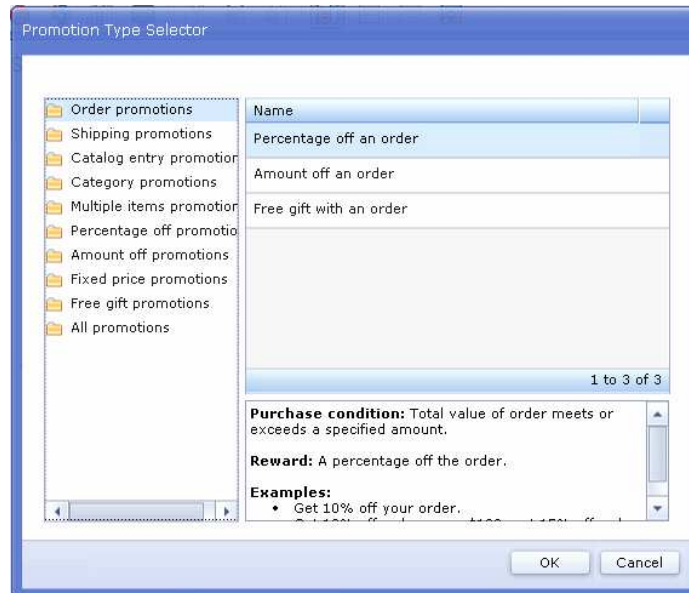WebSphere Commerce Version 7 offers several improvements in creating and managing promotions.

A new administrative name field has been added in Management Center. In earlier versions of Management Center, the promotion name cannot be modified. The new administrative name field can be changed any time the promotion is in an inactive state. The name must be unique within the store.

Since sales catalogs are supported at the asset store level in version 7, it is now possible to target promotions at inherited categories and catalog entries.

By default there is no restriction on the number of promotions that can have a particular priority. You now have the option to require unique priority values by editing a configuration file.

Promotions that are created in Management Center or migrated to Management Center should not be edited in Accelerator. To make this division more clear, all promotions that are managed by Management Center are no longer visible in Accelerator. If you want to disable the Marketing tools in Accelerator entirely, it still requires minor customization.

Template picker

Promotion Type Selector

Order promotions
Shipping promotions
Catalog entry promotion
Category promotions
Multiple items promotion
Percentage off promotio
Amount off promotions
Fixed price promotions
Free gift promotions
All promotions

Name

Percentage off an order

Amount off an order

Free gift with an order

1 to 3 of 3

Purchase condition: Total value of order meets or exceeds a specified amount.

Reward: A percentage off the order.

Examples:
- Get 10% off your order.

OK   Cancel

The promotion template picker is a new way of organizing promotions that makes locating a specific promotion easier for both experienced and novice business users.

Creating a new promotion launches the promotion template picker. A number of predefined promotion types are listed on the left. Selecting a promotion type causes the promotions corresponding to that type to be listed on the right. A description of the currently selected promotion is shown on the bottom right to assist you in confirming you have made the right selection. A single promotion can be found under multiple promotion types.

Template picker customization

- Custom promotion types can be added

- No customization required for promotions to show in the 'All promotions' folder

- How to
  - Add description as an attribute to the wcfObjectTemplate definition for the custom promotion
  - Add a resource bundle with text strings
  - Modify PromotionTypeTemplatePicker.lzx to
    - Specify which folders the promotion is listed in
    - Define a new folder

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The promotion template picker is easily customized. Custom promotions can be associated with existing promotion types and new promotion types can be defined. By default, custom promotions are displayed when you select 'All promotions'. It is also possible to remove existing promotions or promotion types if they are not required.

To add a custom promotion, you must first define the description attribute for the promotion in the wcfObjectTemplate. Next, add a resource bundle with the required text strings such as name and description. Finally, update the file PromotionTypeTemplatePicker.lzx to specify which promotion types your custom promotion is associated with. You can also add a new promotion type filter in this file.

New promotion types

- Amount off shipping on an order

- Buy catalog entry X, get shipping at a fixed price

- Buy catalog entries from category X, get shipping at a fixed price

- Buy A and B, get a percentage off both

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Four new promotion types have been added. Three are shipping level promotions and the fourth offers a percentage off a specific combination of items when the order contains all the items.

For the first new promotion an example is: Get $10 off shipping for orders over $100.

For the second promotion an example is: Buy 3 or more of catalog entry X and pay $1 for shipping.

For the third promotion an example is: Spend $100 on items from category X and pay $10 for shipping.

For the fourth promotion an example is: Buy 3 catalog entries A and 2 catalog entries from category B and get 10% off all these items.

New promotion features

- Maximum discount amount: "20% off greeting card up to $2"

- Target a payment type: "10% off order when paid with store credit card"

- Choice of free gift

- Target specific catalog attributes: "10% off red shirts"

Several new features have been added that can be used by existing promotions.

The first is a maximum discount amount. This can be specified by any promotion offering a percentage discount. It provides a way to cap the value of the promotion.

The second is a payment type filter. This allows order level promotions to be restricted to a specific payment method such as store credit card.

The third is choice of free gift. This addition to the order level free gift promotion allows shoppers to choose from a list of gift options or choose not to receive a gift.

The last is an attribute filter. This can be applied to any category or catalog entry promotions to limit the promotion to a subset of entries that match the specified attributes.

This slide shows the maximum discount amount feature.

The new column 'Maximum discount amount' is an optional field. If you do not specify any value in that field, the full discount percentage is applied. For promotions that don't have purchase ranges there is a single maximum discount amount field.

Payment type

Purchase Condition and Reward

*Minimum purchase condition

* Minimum Order Purchase (USD)	* Amount Off (USD)
100.00	10.00

1 to 1 of 1

*Target payment type: VISA Credit Card

Full order must be paid for with selected payment type. Split orders do not qualify

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This slide shows the payment type feature. The payment type dropdown is populated with all payment types configured for the store. Orders must be paid for in full with the selected type to qualify. Split orders are not allowed. The default option is "Any payment type". This feature is not supported in the Madisons starter store but some information is available in the information center on how to implement it.

Choice of free gift is an enhancement to the order level free gift promotion. The promotion can be set to work as it has in the past, where the free gift is automatically added to the shopping cart. The alternative, shown in this slide, is to specify a list of gift options along with the number of free gifts the shopper can choose. Shoppers are also allowed to opt out of the free gift. Each gift can only be selected once for a particular order.

This slide shows the new Madisons dialog where customers select their free gift.

This slide shows the screen for defining an attribute filter for a promotion. Attribute filters can be defined for product and category promotions. The attribute name must match the name of a defining or descriptive attribute in the catalog. The attribute value must match one of the defined values. The data type of the attribute can be text or number. Several matching rules are available such as "value can be any of", "value cannot be any of", and many numerical comparison options.

Traditional promotion evaluation

Promotion evaluation sequence

1. Product level
2. Order level
3. Shipping

order → Promotion Engine

Return result to order

Get all promotions to be evaluated and build a default promotion evaluation sequence

Evaluate this sequence
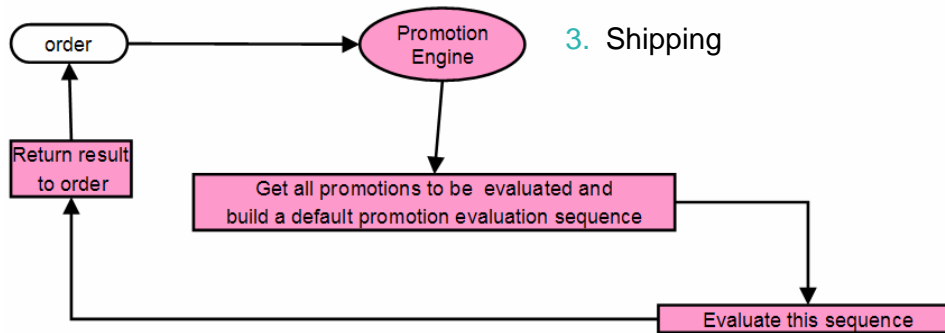
This chart shows a traditional promotion evaluation. The promotion sequence is created by the sequence builder before the evaluation starts.

During the evaluation process, promotions are evaluated one by one according to a sequence defined by the PromotionAgendaBuilder. Once a promotion qualifies, its adjustment is applied to the order. The change to the order affects the qualification for the remaining promotions. It also affects the adjustment for the next qualified promotion since, most of the time, the calculation is based on the current discounted price instead of the original price.

By default, product level promotions are evaluated first, followed by order level promotions, and then shipping promotions. Within the same promotion group, the promotion that has the high priority value is evaluated first.

Promotion priority allows you to control conflicting promotions and makes sure discounts are applied according to the marketing plan. Typically it aims to offer the shopper the lower overall purchase price. In some cases, it is not possible to tell beforehand which promotion ordering offers the best value for the shopper. In those cases, the default promotion sequence might not provide the best promotion value.

Best deal support
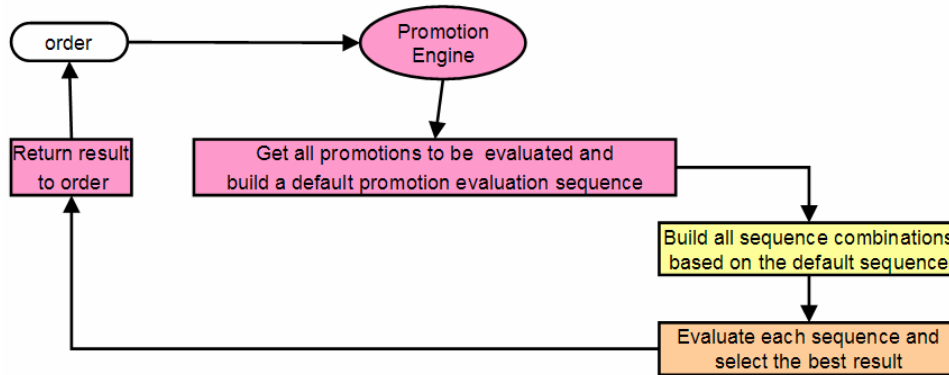
- WCSPromotionEngineConfig.xml
  - <EvaluationFlowControl>1</EvaluationFlowControl>

In version 7, there is an option to include additional steps in the promotion calculation process. This flow will evaluate all sequence combinations during the process and return the sequence that provides the best value for the shopper.

The best deal logic still respects promotion group and priority. It only evaluates different sequence combinations if multiple promotions are in the same promotion group and have the same priority value. This will ensure you can still control the evaluation sequence according to business requirements, but also have the flexibility to allow best deal calculations where needed.

Best deal support does have a performance impact and is turned off by default. It is enabled by setting the EvaluationFlowControl value to 1 in WCSPromotionEngineConfig.xml

Best deal performance considerations

- Number of evaluation sequences is n! where n is the number of qualifying promotions

- Use priority to differentiate between promotions when possible

- Threshold value limits max number of sequences evaluated
  - WCSPromotionEngineConfig.xml
    - <SequenceCombinationLimit>50</SequenceCombinationLimit>

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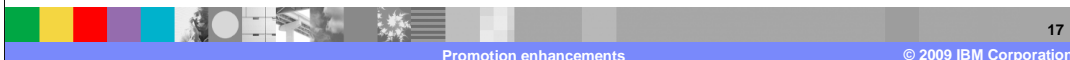
Though the best deal logic provides a solution to achieve the better deal, it does so by performing evaluations on all sequence combinations. Therefore the performance impact must be considered when assigning priority values. As a general rule to achieve better performance, multiple promotions should only use same priority value within the same promotion group when the better discount value can not be determined ahead of time.

A threshold value is provided to control the maximum number of promotion sequences that can be evaluated. This threshold value can be modified in the WCSPromotionEngineConfig.xml file by setting the SequenceCombinationLimit value. If the total number of promotion sequences exceeds this threshold, only the original sequence is evaluated. This allows you to control the maximum cost of the best deal calculation.

Best deal customization

- Default is price-based comparison

- Other comparisons possible
  - ▶ Value of free gifts
  - ▶ Shipping charges

- Customization steps
  - ▶ Extend compareResult() method of DefaultPromotionEngine class
  - ▶ Add comparison logic between two PromotionArguments

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The best deal calculation is currently price based and does not take the value of free gifts or shipping charges into consideration. You can extend the compareResult() method of the DefaultPromotionEngine class and implement your own comparison logic between two PromotionArguments.

Limitations

- Payment type promotions not supported in starter stores
  - ▶ High level documentation in information center
- Best deal does not consider free gifts or shipping charges

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There are some limitations to remember when working with promotions in version 7. First, the new payment promotion type is not supported in the Madisons starter store. There is documentation on how to customize this in the information center. Second, the best deal calculation does not consider the value of free gifts or shipping charges. This can be achieved through customization.

Problem determination

- Same trace options as V6

- Other things to check
  - Best deal configuration
  - Errors in attribute filter names

If your promotions are not being applied in the way you expect, the recommended debugging method is to enable the promotion trace component. The trace structure has not changed significantly since version 6.

In addition to trace statements, you can also verify your best deal configurations are set correctly. Remember best deal is turned off by default and too many promotions with the same priority can exceed the sequence combination limit.

If you have enabled attribute filters on your promotions and they are not being applied, verify that there are not errors in either the promotion names or values.

Summary

- Overview

- Tool improvements

- New promotion types

- New promotion features

- Best deal support

- Limitations

This presentation began with an overview of changes made to the promotions capability in WebSphere Commerce. It then introduced business user tool improvements, new promotion types and new promotion features. Following the new promotion types and features was a discussion of best deal support. The presentation concluded with a summary of promotion limitations.

References

- ## Best deal overview
  - http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/index.jsp?topic=/com.ibm.commerce.management-center.doc/concepts/cprbestdeal.htm

- ## Enable best deal
  - http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/index.jsp?topic=/com.ibm.commerce.admin.doc/tasks/tprengcfgbestdeal.htm

- ## Performance considerations for best deal
  - http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/index.jsp?topic=/com.ibm.commerce.management-center.doc/concepts/cprbestdealperf.htm

- ## Enabling payment type promotion in Madisons
  - http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/index.jsp?topic=/com.ibm.commerce.management-center_customization.doc/tasks/tprpaymenttype.htm

This slide contains some useful references for promotions in version 7.

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