Sitecore E-Commerce Services 2.2 on CMS 7.0 or Later

DMS Cookbook

A marketer's guide to Sitecore E-Commerce Services and DMS

Table of Contents

Chapter 1

Introduction

Sitecore E-Commerce Services is a fully functional webshop product that allows you to rapidly develop and deploy an end-to-end e-commerce solution.

This manual describes how marketers and webshop managers can utilize the Sitecore Digital Marketing System (DMS) in combination with E-Commerce Services to analyze the shopping behavior of customers and to assess the overall effectiveness of your e-commerce website with the aim of increasing ROI (return on investment). The topics covered include analyzing webshop traffic and visitor behavior using DMS reports, visitor profiling, setting goals, managing campaigns and creating visitor personalization.

In this manual, we use a very basic sample webshop that sells photographic equipment to illustrate the functionality in Sitecore E-Commerce Services and Sitecore DMS. This sample site consists of just a few simple pages.

This manual contains the following chapters:

- **Chapter 1 — Introduction**
  This is a brief description of the manual, its aims, and its intended audience. It also includes a list of other useful DMS documents.
- **Chapter 2 — Profiling Visitors and Customers**
  Learn how to plan and implement a profiling strategy using profile cards, pattern cards, and personas.
- **Chapter 3 — Goals and Campaigns**
  Learn how to create goals and campaigns. Understand how you can use goals and engagement value points to make your e-commerce marketing efforts more effective.
- **Chapter 4 — Creating MV Tests**
  How to create and configure MV tests in the Page Editor.
- **Chapter 5 — Creating Personalization**
  Learn how to create and configure personalization in the Page Editor using rules and pattern cards.
- **Chapter 6 — Analyzing Visitor Behavior**
  This chapter explains how to use Sitecore DMS reports and web forms reports with Sitecore E-Commerce Services.

1.1 Sitecore E-Commerce Services and the DMS

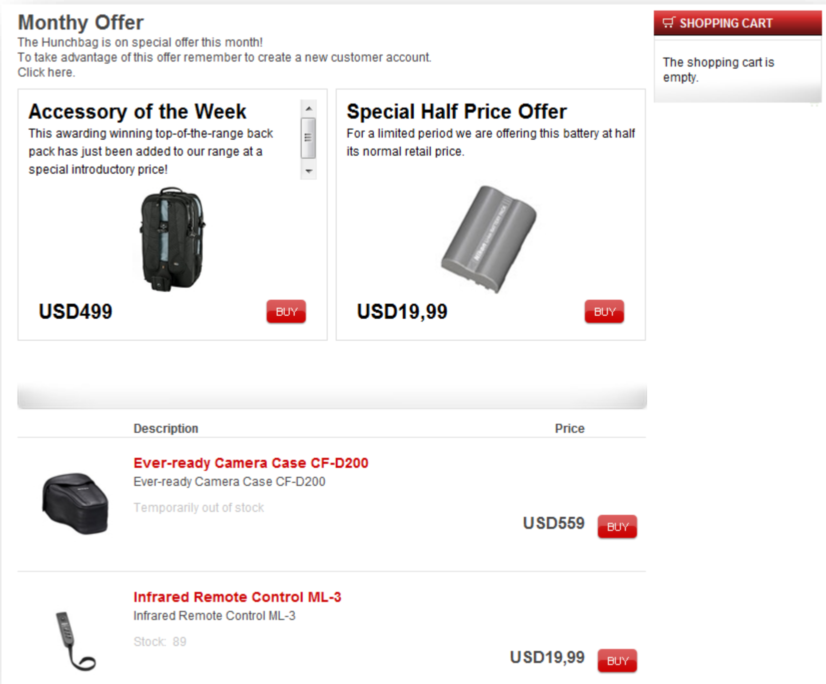
Combining Sitecore E-Commerce Services with the Sitecore Digital Marketing System enables you to harness the power of a visitor experience database with web analytics on your e-commerce website.

The DMS helps you gain a better understanding of your site visitors and customers enabling you to optimize your website to increase conversions and maximize ROI.

When you use Sitecore E-Commerce Services in combination with DMS, you can:

- Profile your site visitors.
- Record conversions and goals.
- Create and optimize campaigns.
- Create and configure MV tests.
- Create and configure end user personalization.

To demonstrate some of these features we will use the sample pages monthly offer page. This page displays a selection of products at special discount prices. We will return to this example as we describe how to configure different features of the DMS combined with e-commerce functionality.



For more information on how to implement DMS functionality, see the *Marketing Operations Cookbook*.

1.2 DMS Documentation

The Sitecore Developer Network (SDN) contains several useful documents that provide more information on the Digital Marketing System. You should familiarize yourself with these documents as you use this cookbook.

User Guides:

- Marketing Operations Cookbook – DMS end user guide for Marketers.
- Report Designer Cookbook – DMS reports and Engagement Analytics.
- Executive Dashboard Cookbook – Executive Insight Dashboard charts and tables.
- Engagement Automation Cookbook - Marketers guide to creating and configuring customer engagement plans.
- Web Forms for Marketers v 2.3 User Guide

Advanced Guides:

- Engagement Analytics API Reference Guide
- Engagement Analytics Configuration Reference

Chapter 2

Profiling Visitors and Customers

On an e-commerce website, profiling site visitors enables you to target content at specific customer groups based on their interests, browsing behavior, and purchase history. For example, targeted content could highlight specific products or special offers.

This chapter contains the following sections:

- Planning an E-Commerce Profiling Strategy
- Profiles and Profile Keys
- Assigning Profile Values to Items

2.1 Planning an E-Commerce Profiling Strategy

Profiling is often one of the first tasks when configuring the DMS. However, before you start creating profiles and personas for your e-commerce website it is important to invest an appropriate amount of time planning your profiling strategy.

To utilize the full power of the DMS you should plan the implementation of your profiling strategy carefully. Appropriate time and attention spent on this stage of your planning pays off later when your site is up and running, making the implementation of personalization and engagement automation more straightforward.

Tips for creating profiles and personas:

- Analyze your business or website - Gather information about your customers/visitors before creating profiles and personas.
- Understand your customers and know your target groups.
- Run DMS and view the Visit Detail (Session) report – classify visitors to identify potential target groups.
- Turn key target groups into personas.
- Think about what customer information you could have on your site that could help you win business. This might help to indicate what profiles and profile keys you should have. For example, the sample pages display different types of cameras products that could appeal to different types of photographers.

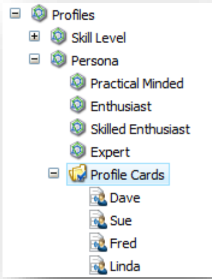
2.1.1 Personas

The SES sample web shop sells cameras and accessories to a wide range of potential customers from beginners to professional photographers. The personas that you create should reflect this. You could create profiles for these target groups but your personas should overlap and reflect a broad range of visitor interests.

Example personas for the SES sample pages:

- Dave - Novice
- Sue - Amateur
- Fred - Semi Pro
- Linda - Professional

These personas could reflect the skill level of different photographers visiting the site. When you create personas you should also think about creating the details of each persona. In DMS persona profile cards contain fields specifically for this purpose, such as age, occupation, family, interests, and psychographics.



2.1.2 Profiles and Profile Keys

When you have planned your profile strategy, use the Marketing Center to create profiles and profile definition items.

As part of profiling, you should:

- Create profiles.
- Create profile keys.
- Assign values to profile cards.
- Assign profile cards to content items.

Each profile can have several profile keys. When you create a profile you can decide how you want to calculate profile scores, for example by percentage or sum. When you create profile keys you can decide which type of control to use to set profile values. For example, you can choose sliders, smileys, or stars.

In the Content Editor, use profile cards to assign pre-defined values to individual content items. You can create profile cards in the Page Editor or the Content Editor.

The DMS Marketing Center has the following default profiles and profile keys:

Profiles	**Profile Keys**
Focus	Background
	Practical
	Process
	Scope
Function	Building Trust
	Call to Action
	Create Desire
	Define Concept
Persona	Cecile
	Chris
	Ian

Profiles	Profile Keys
	Sandra
Score	Lead

These are only example profiles and not suitable for every website. You can use these profiles to try out profiling functionality but you should create a new set that are appropriate for your website as soon as possible. In this cookbook we use several different set of profiles and profiles as examples depending on the topic.

For more information about creating profiles and profile keys, see the *Marketing Operations Cookbook*.

2.2 Assigning Profile Values to Items

The examples in this section illustrate some possible approaches to profiling using the default profiles and profile keys in the DMS. You can assign profile values to content items manually or using profile cards. Profile cards enable you to assign a set of pre-defined profile values to content items.

On an e-commerce website you can add profile key values to:

- Content Items
- Product Categories
- Products

You cannot assign DMS profile values to forms, only to the pages that forms appear on.

Assigning profile keys is always a subjective process and is different for every website. The first time you set these values you may find it time consuming and repetitive. Profile cards help you to speed up the process.

You can re-visit these values later and fine-tune them. However, once you start to see how you can use profile data in the DMS to segment site visitors and to create real-time personalization, you will start to understand the benefits of creating an effective profile strategy.

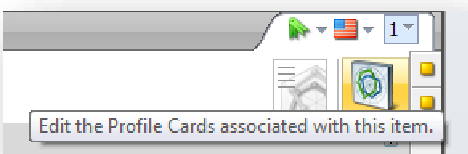
Manually Assigning Profile Values

The *Customer Details* page is the first page in the checkout process and contains the *Create Account* form. It is on the completion of this form that the visitor becomes a customer.

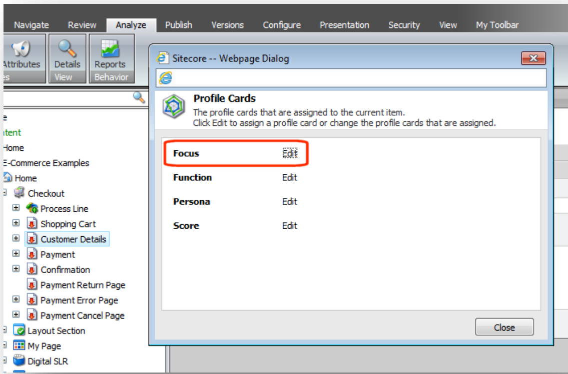
This page contains forms that the user must fill in if they want to place an order. This requires action from the visitor so you should give the *Call to Action* function a high profile key value to reflect this.

To assign profile values manually to a page:

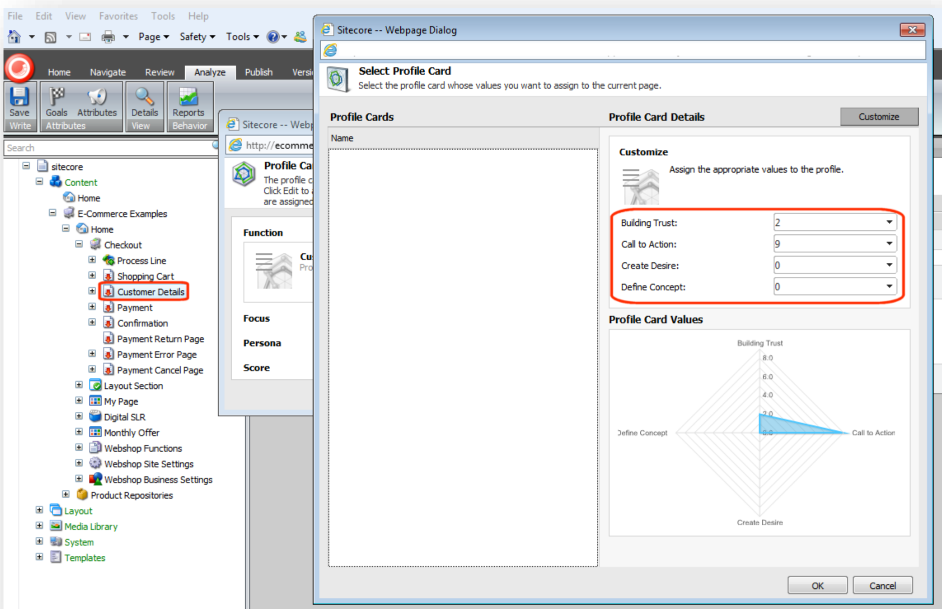
1. In the **Content Editor**, navigate to the *Customer Details* page.
2. With the *Customer Details* page selected, click on the Profile Card icon to open the **Profile Cards** dialog box.



3. In the **Profile Cards** dialog box, click **Edit** to edit the *Function* profile card.



4. Use the drop-downs to select appropriate values. As this Profile Card is on the **Customer Details** form, assign a high value to *Call to Action*.



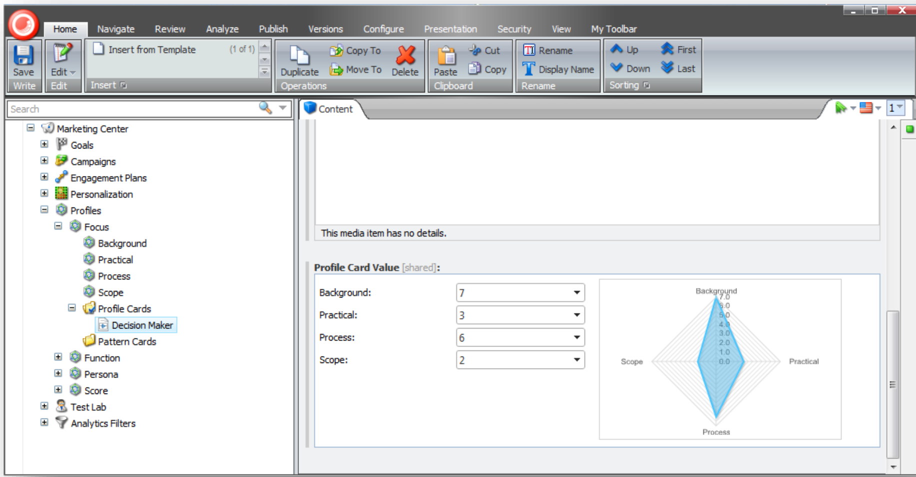
You can see a visual overview of the Profile Card Values for this content item as a Radar diagram.

5. Click **OK** to close the **Select Profile Card** dialog box and to save your changes.

Profile Cards

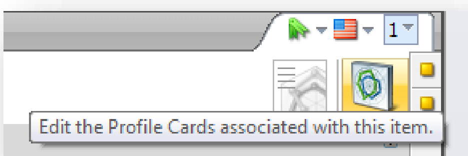
In DMS, you can use profile cards to create pre-defined profile values. Profile cards enable you to assign profile values easily to content items. For example, on a site that contains a large number of content items this helps to speed up the profiling process.

An example of a profile card called *Decision Maker* (from the Marketing Operations cookbook):

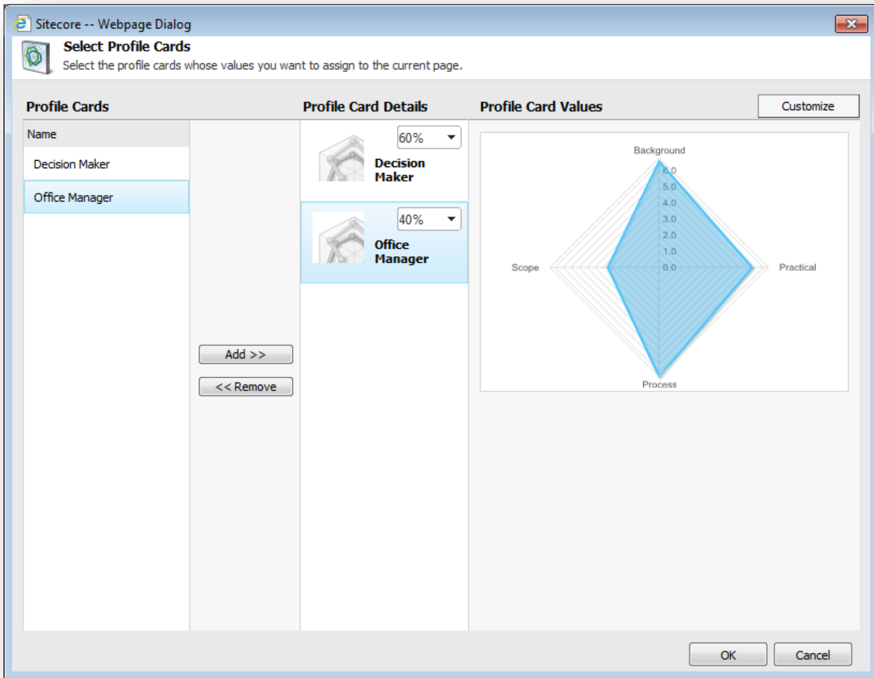


To add a profile card to a content item:

1. Select a content item. For example, *Monthly Offer*.
2. Click *Edit the Profile Cards associated with this item*.



3. In the **Select Profile Cards** dialog box, select a profile card, such as *Office Manager* and click **Add**:



4. Click **OK** to save your changes.

In this example, the *Office Manager* Profile Card contains pre-set profile values classifying this page as appealing office managers. You could classify visitors that score highly on this profile card as belonging to the marketing segment that corresponds with office managers. The next step could then be to create personalized content for this marketing segment.

By adding profile values to products, you can find out more about the interests and preferences of site visitors, making it easier to segment visitors, and to know which products to keep in stock. Profiling also makes it possible to implement personalization using rules or pattern cards.

For more information on how to create and assign profile cards, see the *Marketing Operations Cookbook*.

Pattern Cards

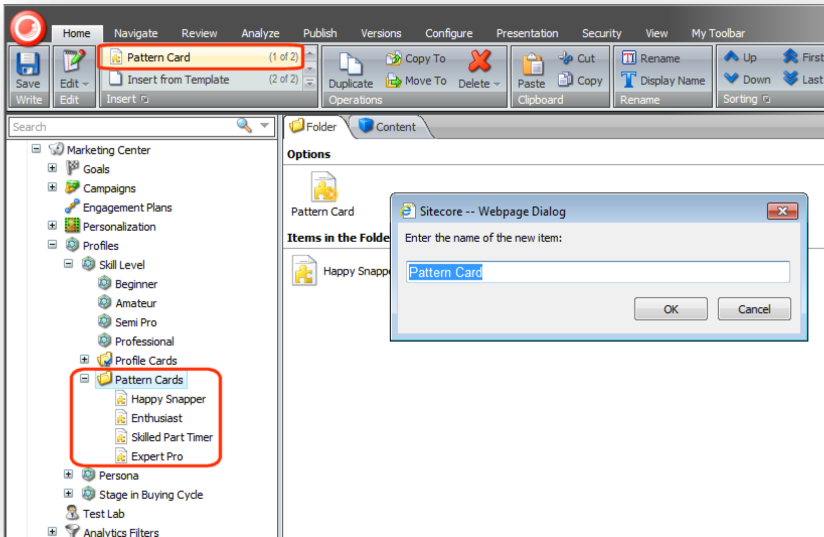
A pattern card is a predefined set of profile values that reflect the behavior and interests of a specific type of visitor in terms of a particular profile key. Sitecore maps visitors to the pattern card that matches their behavior the closest. You can then use pattern cards to define personalization rules and to implement engagement automation plans.

Profile cards and pattern cards both use radar diagrams to represent visitor profile values.

Creating a pattern card:

1. In the Marketing Center, expand the **Profiles** node.
2. Choose a Profile category, for example *Skill Level*. Expand the profile node and select *Pattern Cards*.

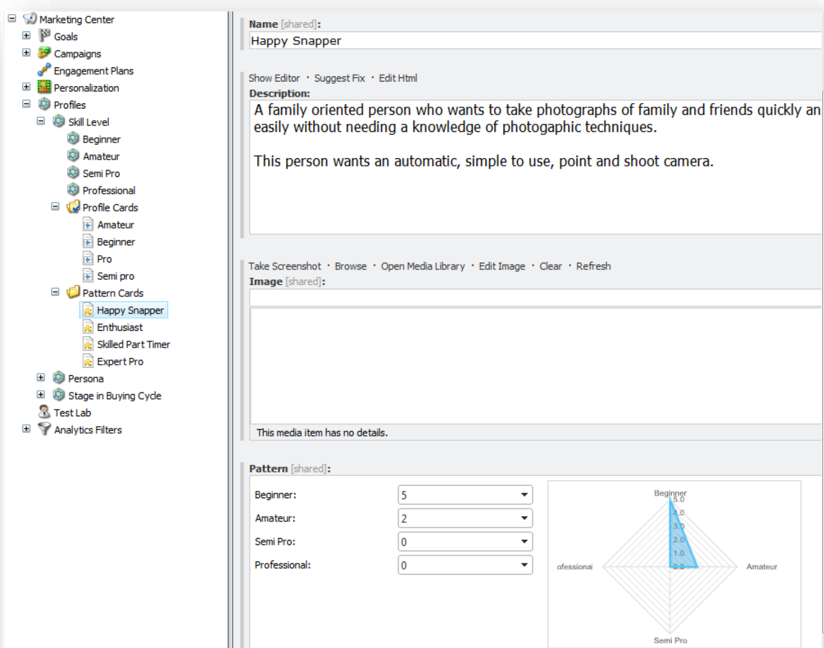
3. On the ribbon, **Insert** group, click Pattern Card to create a new pattern card item.



Name the pattern card, *Happy Snapper*, and add a description and an image.

4. In the **Pattern** field, set profile values using the drop-downs that reflect the characteristics you want to define in this pattern card. This example is very much a beginner photographer.

   When a visitor makes a visit that matches the *Happy Snapper* pattern card, they see specific personalized content such as *'point and shoot'* cameras.



You can create as many pattern cards as you like. They do not need to match your profile cards but they can represent different segments of the market that you want to target.

For more information on personalization, see the section the *Marketing Operations Cookbook.*

Chapter 3

Goals and Campaigns

Goals help you to measure the effectiveness of your campaigns and the overall success of your website. Create campaigns to promote products and to encourage site visitors to show commitment.

You can assign a goal to any event, such as signing up for a newsletter, adding a product to the shopping cart, or confirming an order. Choose goals carefully so they measure the important stages of commitment that lead to a customer purchase.

This chapter contains the following sections:

- Goals, Events and Conversions
- Creating and Managing Campaigns

3.1 Goals, Events and Conversions

A goal is a specific activity (page event) on a website that displays commitment on the part of a visitor to a course of action that is part of a marketing process. For example, filling in and submitting a webform indicates a commitment on the part of the visitor to engage in a conversation with your organization.

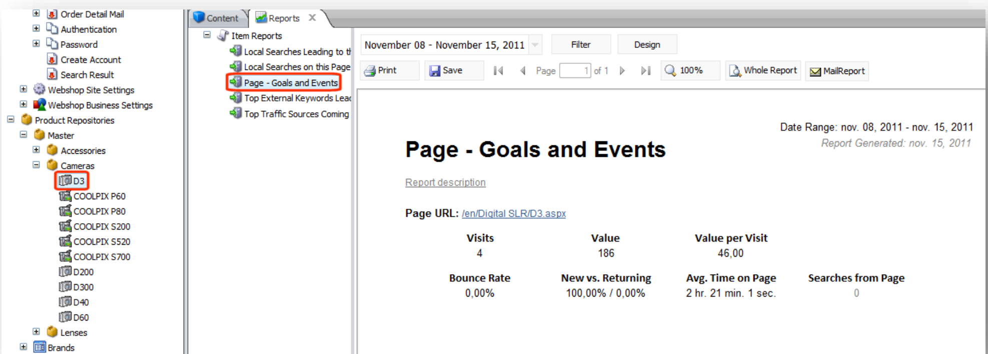
In DMS, engagement value points are a numeric value that you assign to the goals or page events that are associated with your marketing activities on your website, and that demand commitment from your visitors.

Every time a visitor lands on a page that has a goal or page event associated with it, they accumulate engagement value points which contribute to their overall score. After they have left the website, this score becomes the engagement value for that visit.

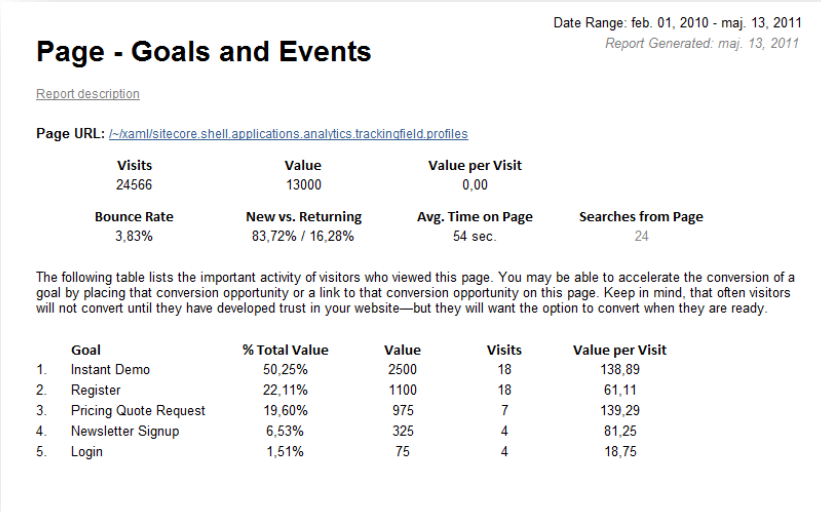
On an e-commerce website this information can help you to track which events lead to the most visitor conversions. This helps you to optimize your website, increase customer purchases, and improve ROI.

In Sitecore E-Commerce Services, you can view the *Page – Goals and Events* report for each content item. This report gives you a breakdown of all the goals and events achieved. It also shows visits, value and value per visit.

The following example from the sample pages shows goals and events achieved on a single product - the D3 camera:



An example of the *Page - Goals and Events* report from *Sitecore.net*:


Date Range: feb. 01, 2010 - maj. 13, 2011
Report Generated: maj. 13, 2011

Page - Goals and Events

Report description

Page URL: /~/xaml/sitecore.shell.applications.analytics.trackingfield.profiles

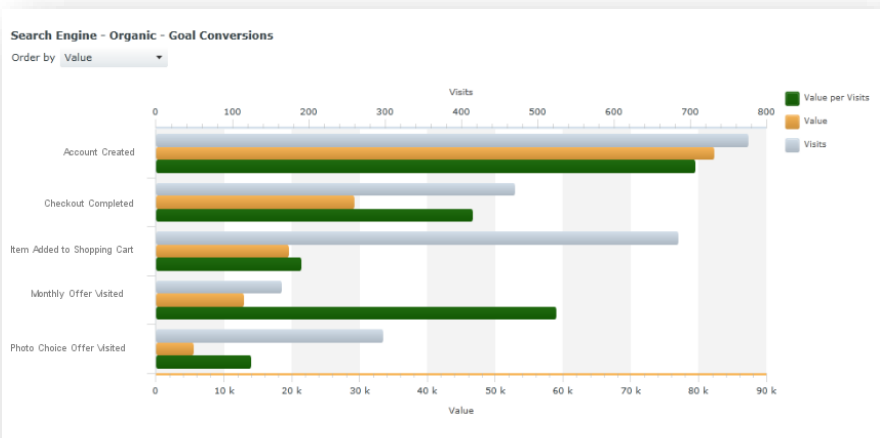
Visits	Value	Value per Visit	
24566	13000	0,00	
Bounce Rate	**New vs. Returning**	**Avg. Time on Page**	**Searches from Page**
3,83%	83,72% / 16,28%	54 sec.	24

The following table lists the important activity of visitors who viewed this page. You may be able to accelerate the conversion of a goal by placing that conversion opportunity or a link to that conversion opportunity on this page. Keep in mind, that often visitors will not convert until they have developed trust in your website—but they will want the option to convert when they are ready.

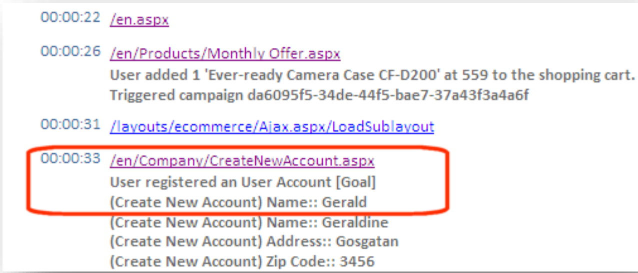
	Goal	% Total Value	Value	Visits	Value per Visit
1.	Instant Demo	50,25%	2500	18	138,89
2.	Register	22,11%	1100	18	61,11
3.	Pricing Quote Request	19,60%	975	7	139,29
4.	Newsletter Signup	6,53%	325	4	81,25
5.	Login	1,51%	75	4	18,75

In the Executive Insight Dashboard, you can view the goals achieved as a result of visiting a campaign or that originate from a specific traffic type. The dashboard displays value, visits and value per visit generated on the site as a result of achieving specific goals.

This dashboard shows the engagement value of goal conversions that originated from the sample pages Search Engine - Organic traffic type:



When you achieve a goal it also appears in the session trail alongside other events recorded in the *Visits Detail (Session)* report.



You create goals in the Marketing Center and then assign them to content items.

3.1.1 Goals

On an e-commerce website, you can assign goals to:

- Content Items
- Product categories
- Products
- Web forms

To illustrate how to assign goals we will use the, *Monthly Offer* section.

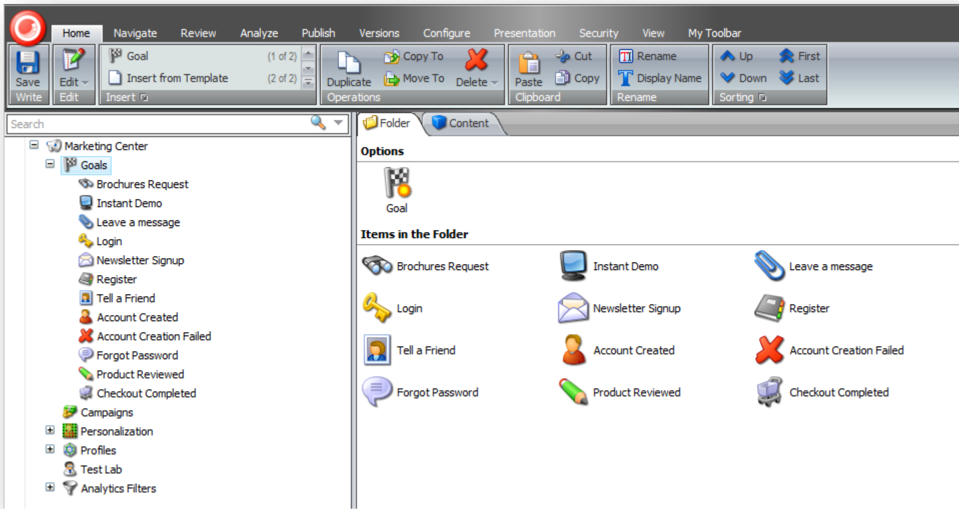
In the Marketing Center, create a goal called *Monthly Offer Visited*. To make this goal appear in your Sitecore reports, select the *IsGoal* check-box.

Creating a Goal

The *Monthly Offer Visited* goal has not been created yet.

To create the *Monthly Offer Visited* goal:

1. In the Sitecore desktop, click **Sitecore**, **Marketing Center**.

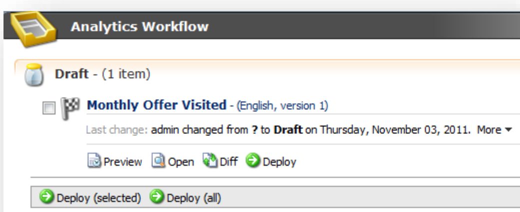


2. In the **Marketing Center** content tree, click Goals.
3. In the **Home** tab, **Insert** group, click Goal.
4. In the **Goal** dialog box, name the new goal *Monthly Offer Visited.*
5. Ensure that the **IsGoal** check box is selected.

Before a new goal is available to use in Sitecore, you first need to deploy it in the workflow.

To deploy a goal in the workflow:

1. Click the Sitecore button and then click the Workbox.
2. In the Workbox, you can see the new goal that you created.



3. Click Deploy and enter a message such as, *'goal deployed'* in the dialog box provided.
4. Finally publish the goal to make it available on your website.

Assigning a Goal to a Content Item

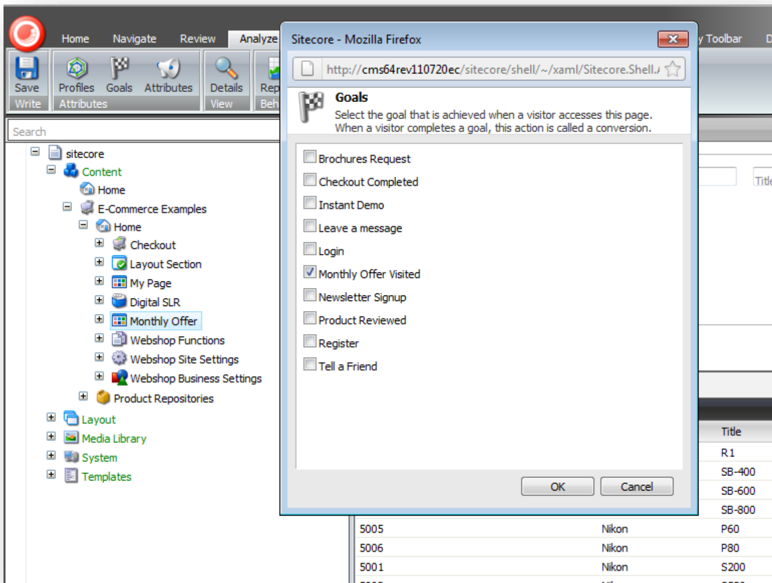
The *Monthly Offer* page contains products that you want to promote. To trigger the *Monthly Offer Visited* goal on this item, you must first assign this goal to the *Monthly Offer* item.

This means that each visitor viewing the *Monthly Offer* page will achieve a conversion, taking them one step closer to buying a product.

Monthly Offer is also an online campaign, so visiting this page will trigger a campaign event. Capturing this information helps you to measure the success of your campaigns and the overall success of your website.

To assign the *Monthly Offer Visited* goal to the *Monthly Offer* page:

1. In the **Content Editor**, select the *Monthly Offer* product category.
2. In the **Analyze** tab, **Attributes** group, click **Goals**.



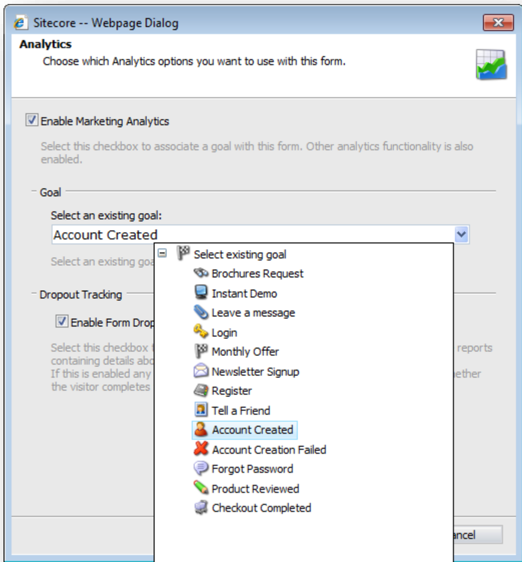
3. In the **Goals** dialog box, select the *Monthly Offer Visited* goal and click **OK**.
4. In the ribbon, click **Save**.

Assigning a Goal to a Web Form

To associate an existing goal with a form on the webshop:

1. In the **Content Editor**, content tree navigate to the *Web Forms for Marketers* node:
   `/sitecore/system/Modules/Web Forms for Marketers/Website/Ecommerce/Examples`
2. Select the *Create Account* form. The **Forms** tab appears in the ribbon.

3. In the **Forms** tab, **Analytics** group, click **Properties**.



4. In the **Analytics** dialog box, in the **Goal** section, click the drop-down list and select an existing goal, for example, *Account Created*.
5. Click **Next** in the **Analytics** wizard to review your changes and then click **Finish**.

For more information about creating and assigning goals, see the *Marketing Operations Cookbook*.

3.2 Creating and Managing Campaigns

Create campaigns to encourage visitors to come to your website and perform desired actions. On an e-commerce website, you want visitors to become customers and to buy products.

In DMS it is quick and easy to create campaigns, and to use Engagement Analytics reports and dashboards to measure their effectiveness. You can fine tune and improve your campaigns over time.

In this cookbook we will focus on two types of campaigns:

- Online campaigns — for example, a Google AdWords campaign that links to a specific page or section on a website.
- Offline campaigns — for example, a magazine promotion with an offline landing page that can only be reached using an alias.

In the Marketing Center, if you create an online or offline campaign, when you trigger the campaign it appears in the Visit Detail (Session) report.

You can view all campaign reports in the Executive Insight Dashboard. The dashboard gives you a quick overview of all your campaigns and marketing channels. You can also drill down into individual campaigns to get more detailed analytics data. For more information, see the *Executive Dashboard Cookbook*.

An example campaign dashboard for Sitecore.net:

You can also create e-mail campaigns using the Sitecore E-mail Campaign Manager. For more information about creating e-mail campaigns, see the *ECM Marketer’s Guide*.

3.2.1 Online E-Commerce Campaigns

To illustrate how to create and evaluate an e-commerce campaign, we will again use the, *Monthly Offer* section. This section contains products that are on offer at special discount prices.

To promote your campaign, you can use tools such as Google AdWords to ensure that potential customers reach your site from a Google search page. We will assume that most visitors first use a search engine such as Google to find the photographic equipment they want to buy and then click the link that appears in their search results.

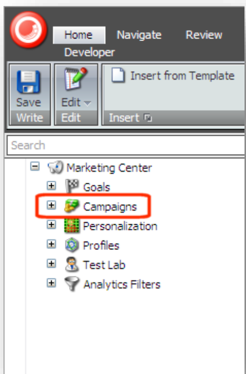
To configure and test an online campaign, you need to complete the following checklist of tasks:

- Create a campaign category.
- Create a campaign.
- Associate the campaign with a web page or content item.
- Visit the campaign page on your webshop.
- View the Engagement Analytics Visit Detail (Session) report – to see which visitors trigger the campaign.
- View the campaign charts in the Executive Insight Dashboard – to see how well the campaign performs alongside your other campaigns.

Creating an Online Campaign Item

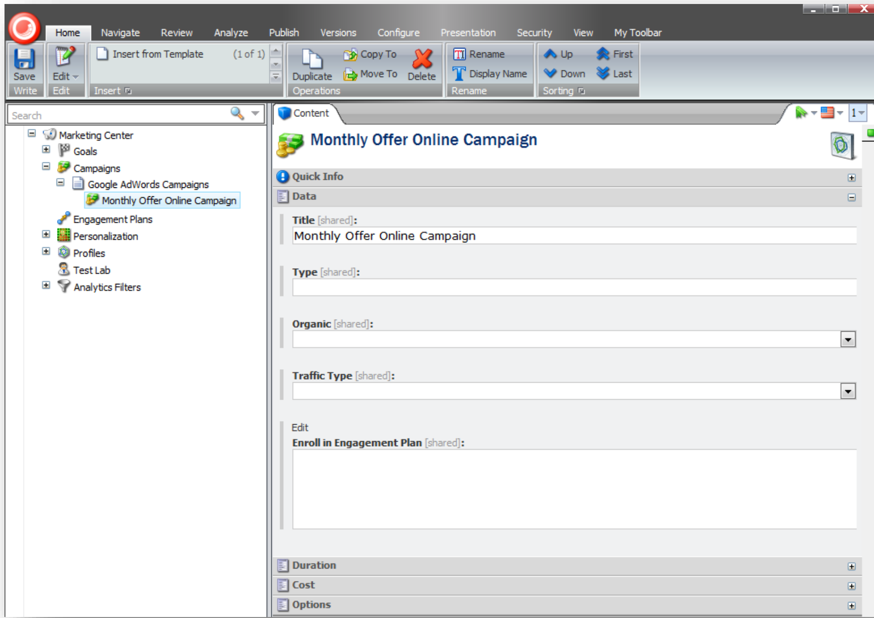
To create an online campaign:

1. Click the Sitecore start menu and then click **Marketing Center**.
2. In the **Marketing Center**, select the **Campaigns** node.



3. In the **Insert** group, click **Campaign Category**.
4. Name your campaign category *Google AdWords Campaigns*.
5. Select the *Google AdWords Campaigns* item and in the **Insert** group, click **Campaign** to create a new campaign item.

6. Name the campaign item *Monthly Offer Online Campaign*.



7. Complete the rest of the campaign fields or leave them blank. You can add this information later:

Field	Details
Title	Name of campaign
Type	Type of campaign - Online, Offline, Email
Organic	Change the traffic type if the campaign is triggered at any time during the visit. Or you can leave this unchanged.
Traffic Type	What type of marketing channel is this campaign? For example, email, paid, referred or something else?
Enroll in Engagement Plan	Select an existing engagement plan to use with this campaign. For example, you might want to trigger an email campaign when a visitor comes to this campaign.

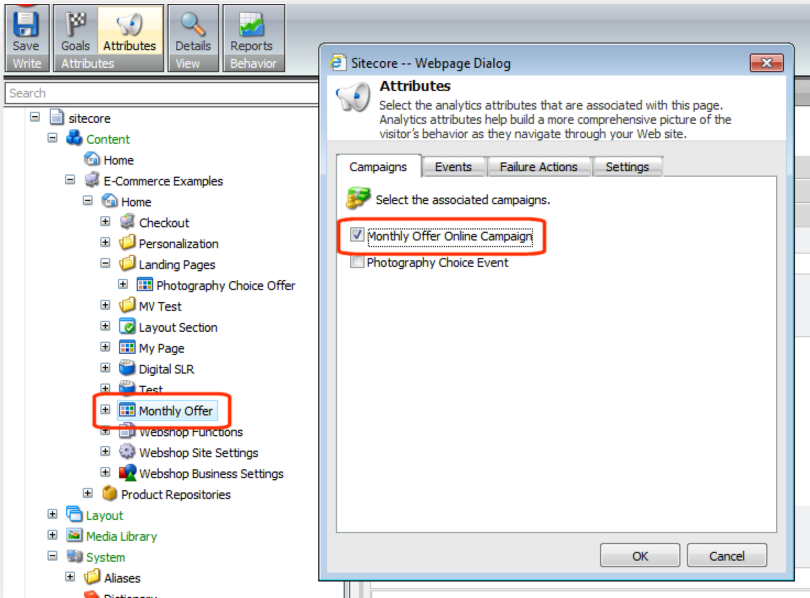
For more information on completing campaign fields, see the *Marketing Operations Cookbook*.

8. In the ribbon, click **Save**.
9. Deploy the campaign in the Sitecore workflow and publish it, so that is becomes available in the Marketing Center.

To associate a campaign landing page item with an online campaign:

1. In the sample page, select the *Monthly Offer* page.

2. On the ribbon, **Analyze** tab, **Attributes** group, in the **Campaigns** tab select the check box next to *Monthly Offer Online Campaign*.



3. On the ribbon click **Save**.

After you have configured and deployed your online campaign, visitors coming to the *Monthly Offer* page from a Google search will trigger the campaign in Engagement Analytics. You can then view the campaign charts in the Executive Insight Dashboard to analyze the performance of this campaign in more detail.

For more information on how to create campaigns, see the *Marketing Operations Cookbook*.

Note
You can use search forms to find the products you want to associate with a campaign or you can copy each product manually so they appear under the appropriate product category.

3.2.2 Offline E-Commerce Campaigns

This section explains how to create an offline campaign for E-Commerce example pages. We will create an example offline landing page to use with the sample pages.

The campaign offers readers of *Photography Choice* (a fictitious photography magazine) an exclusive discount on selected high-end photography products. A special alias has been published in the latest edition of the magazine that gives readers exclusive access to an offline landing page. The aim of this campaign is to attract more professional and semi-professional photographers to the site and encourage them to buy products.

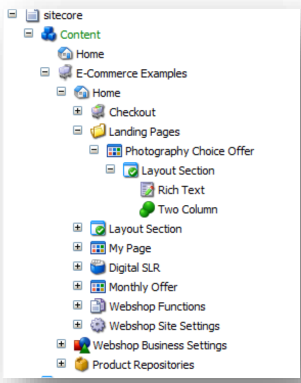
To create an offline campaign, you need to complete the following tasks:

- In the content tree, create a stand-alone campaign landing page.
- Create an alias for the page.
- Create a campaign item.

- Associate the landing page with the campaign.
- Test the landing page.
- View the Visit Detail (Session) report to see when visitors come to the campaign.
- View the campaign chart in the Executive Insight Dashboard to measure the effectiveness of the campaign.

Creating a Landing Page for an Offline Campaign

1. In the **Content Editor** content tree, create a folder called *Landing Pages* to keep your landing page and any other related items.
2. Create a new item based on the *Product Search Group* template. Name the item *Photography Choice Offer*.



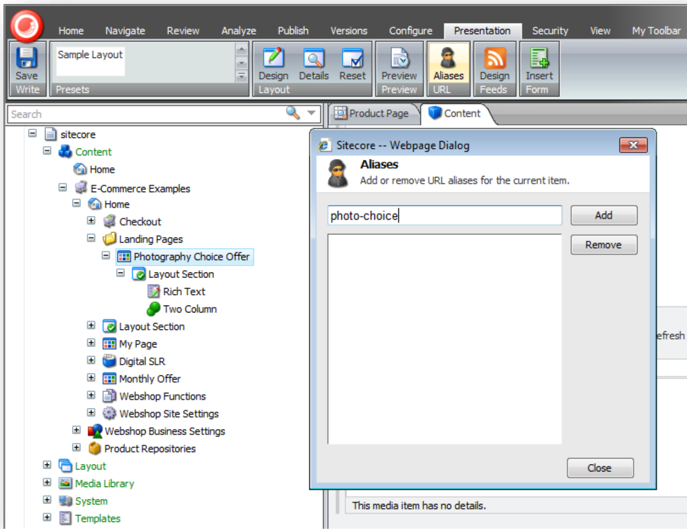
3. Add a **Layout** section and add the following layouts:
   - Rich Text
   - Two Column
4. Add the following text to the **Text** field of the **Rich Text** layout:

   Exclusive offer to readers of Photography Choice Magazine.

   If you register now, get a 30% discount on either of the products below.

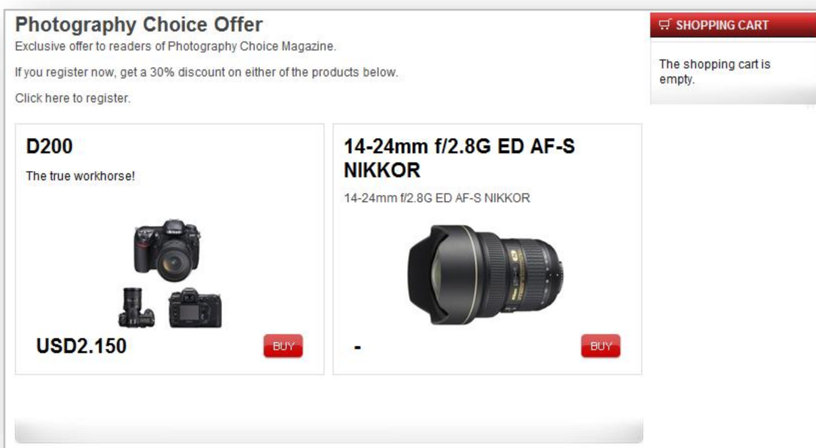
   Click here to register.
5. In the **Two Column** layout item, select the following products:
   - D200
   - 14mm f/2.8D ED AF NIKKOR

6. You must create an alias for your item so it is only available to readers of *Photography Choice*. Select the *Photography Choice Offer* item and then click the **Presentation** tab and click **Aliases**.



7. In the **Aliases** dialog box, add a new alias called *photo-choice*.
8. In the ribbon, click **Save**.

The offline campaign landing page should look something like this:

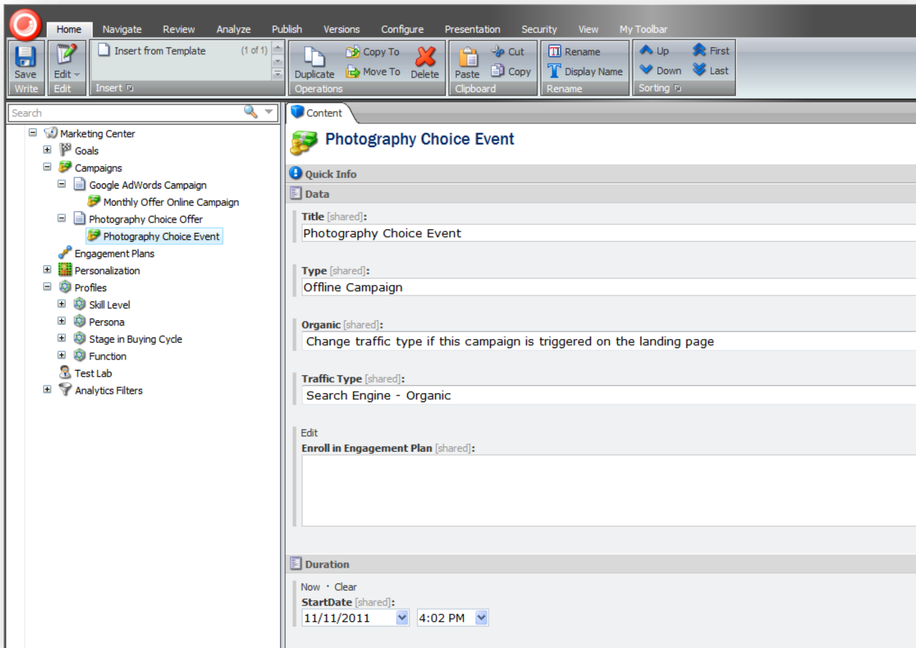


Creating an Offline Campaign Item

To create an offline campaign:

1. Click the Sitecore start menu and then click **Marketing Center**.
2. In the **Marketing Center**, select the **Campaigns** node.
3. In the **Insert** group, click **Campaign**.

4. Name your campaign item *Photography Choice Offer*. Enter appropriate information in all the relevant fields.
5. Create a campaign event item called *Photography Choice Event*.



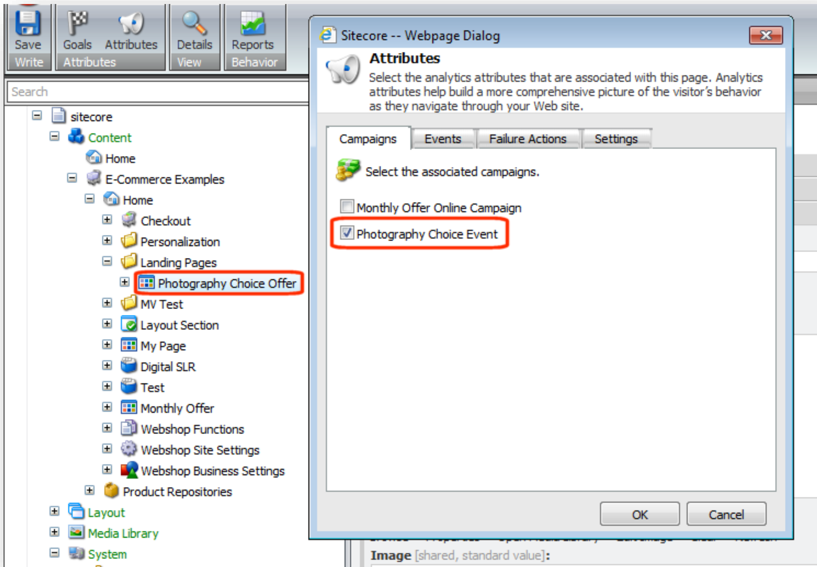
6. On the ribbon, click **Save**.

   Remember to publish the new campaign item.

To associate the campaign with the *Photo Choice* landing page:

1. Select the *Photography Choice Offer* landing page you created.

2. On the ribbon, **Analyze** tab, **Attributes** group, in the **Campaigns** tab select the check box next to *Photography Choice Event*.



3. Click **Save**.

Your offline campaign is active and now every time a visitor comes to the *Photography Choice Offer* landing page they will trigger this campaign. In the Visit Detail (Session) report you can see an entry in the session trail for every visit to a campaign.

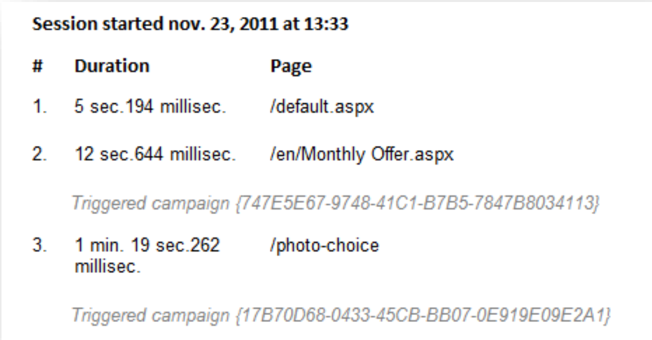
3.2.3 Campaign Reports

View Engagement Analytics reports and the Executive Insight Dashboard to evaluate the success of your campaigns.

The Visit Detail (Session) Report

In Engagement Analytics, click *Recent Activity*, *Latest Visits* to view the most recent visitor sessions on your web shop. If any visitors have triggered a campaign, it appears on the *Visit Detail (Session)* report.

The following session report shows the campaign events that you trigger when a visitor comes to the *Monthly Offer* and the *Photo-Choice* campaign pages.



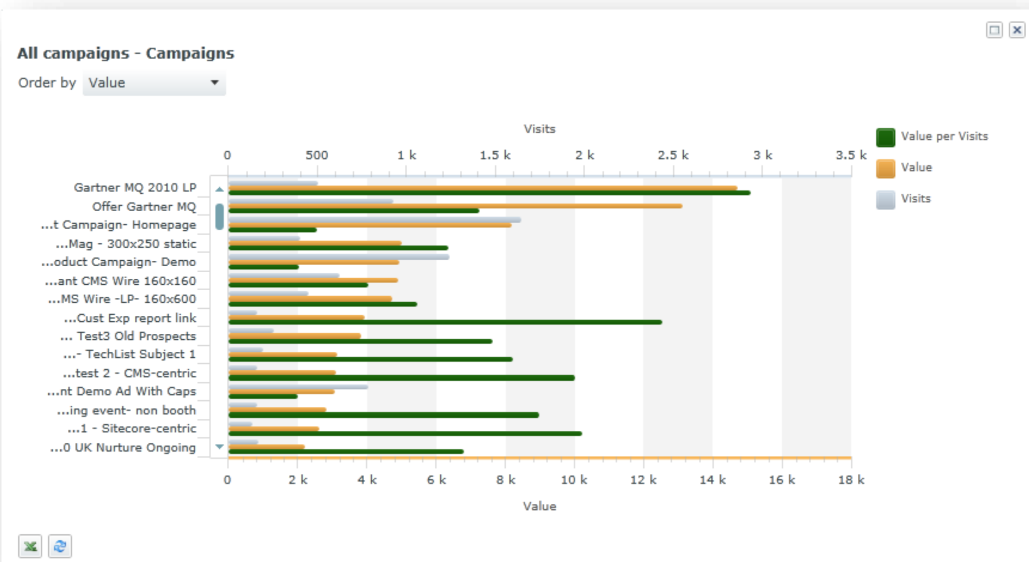
If you associate a campaign with a goal, it is also possible to see in the Visit Detail (Session) report, when a visitor converts a goal.

Campaign Dashboard Charts

The Executive Insight Dashboard enables you to get an overview of all your marketing campaigns. Campaign dashboards and charts not only provide information about which campaigns generate the most visitors but also which campaigns generate the highest value and most relevant visitors to your website.

By calculating the total value accumulated during a visit (engagement value) it is possible to see which visitors have shown the highest levels of commitment on your website.

This is an example campaign dashboard from *Sitecore.net*:



CMOs can use this information to identify underperforming or failing campaigns and to inform their decisions on how to allocate valuable marketing funds and resources.

Campaign marketers responsible for specific campaigns can use the dashboard to drill-down into charts to examine the performance of individual campaigns so they can, if necessary adjust their campaign strategies.

It is also easy to use the Content Editor to create landing pages and as you will see in the next chapter, you can also create MV tests to experiment with different controls or layouts that could help you to optimize your campaign landing pages.

For more information on campaign charts, see *The Executive Dashboard Cookbook*.

Chapter 4

Creating MV Tests

Multivariate testing is a powerful way to find the most effective controls to use on your campaign landing pages or other pages on your website. For example, a web control could be a campaign slogan and banner, a button to purchase an item or a simple web form. MV Tests can help you to decide which combinations of images and text work best.

This chapter contains the following sections:

- Creating an MV Test
- Running an MV Test
- Evaluating MV Test Results

4.1 Creating an MV Test

In the DMS it is quick and easy to create an MV test and to integrate it with your Sitecore E-Commerce Services installation.

Once you have configured an MV Test in the Page Editor, you can view the percentage of visitors that use each control and the number of conversions that result from each test. In the Page Editor, you can also create combination tests which enable you test multiple combinations of controls on the same web page.

On an e-commerce website optimizing your web controls can make your campaigns more effective and result in increased sales and ROI.

To illustrate this in the web shop sample pages, we will create two very different marketing slogans to encourage visitors to buy the products featured in the *Monthly Offer* campaign.

Use the following slogans or create some of your own:

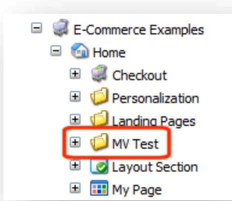
Slogan 1	**Slogan 2**
Please buy the products on this page!	*Two unique products on special offer this month!!* *Get a 30% discount if you buy now!!*

Checklist of tasks:

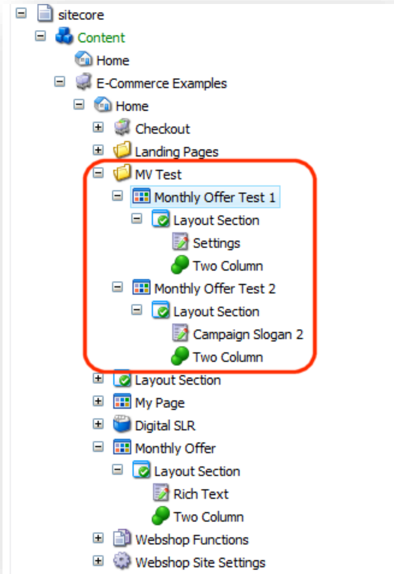
- In the content tree, create MV Test content items containing two different slogans.
- Use the Page Editor to create an MV test and some test variables.
- Preview the MV test in the Page Editor.
- Run the MV test.
- View the results of the test in the Page Editor.
- Select the most effective test variable.

To create MV Test content items:

1. In the content tree, create a new folder called *MV Test*.

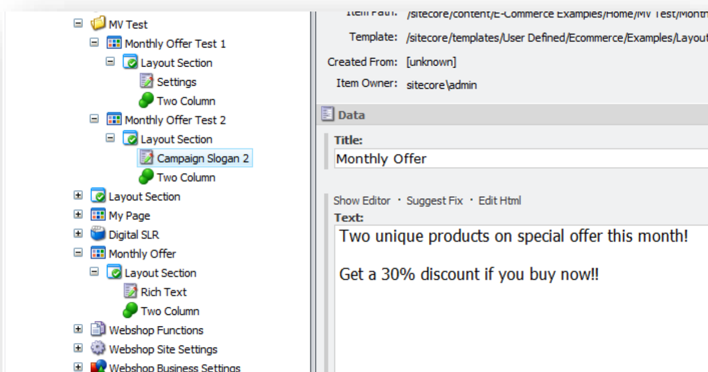


2. Duplicate the **Monthly Offer** content item and move it to the **MV Test** folder. Include the **Product Search Group** item and all the sub items.



You can also use the original Monthly Offer as a third test variable. This means that you can easily revert back to your original slogan.

3. Edit the **Rich Text** layout items in each **Monthly Offer** item so that each offer contains a different campaign slogan.

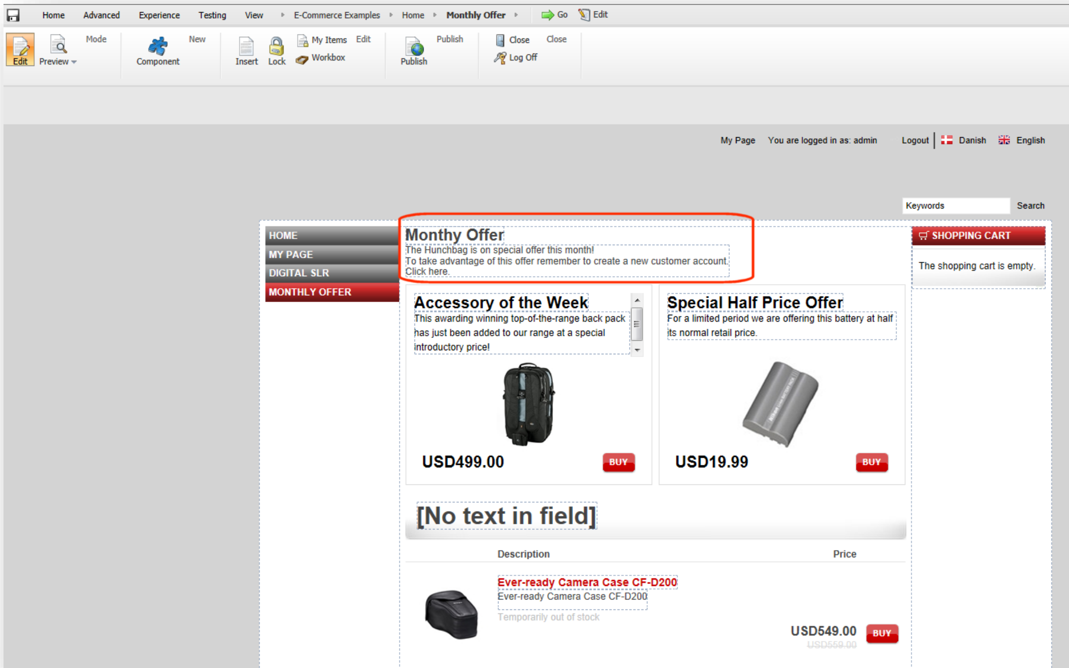


Now that you have created two test variables you can configure the test in the Page Editor.

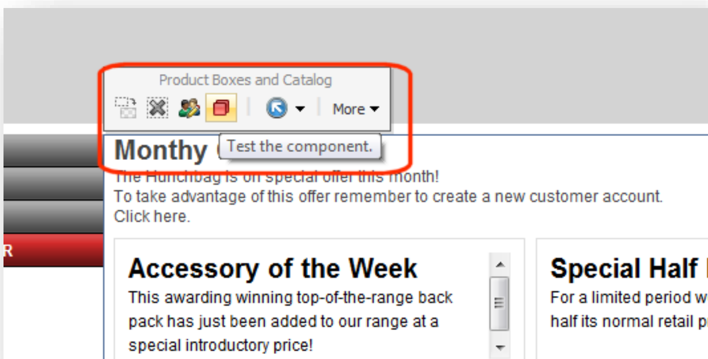
To create an MV Test in the Page Editor:

1. Open the Page Editor.

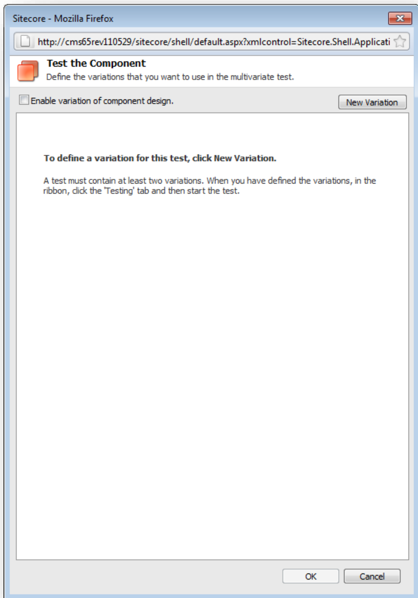
2. Select a component on your website to test. For example, the slogan on the *Monthly Offer* page.



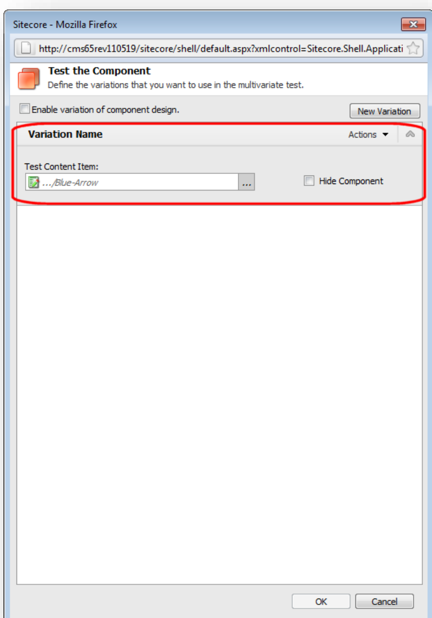
3. Select the *Product Boxes and Catalog* rendering.
4. Move the mouse over the floating toolbar until you see the tool tip *Test the component*.



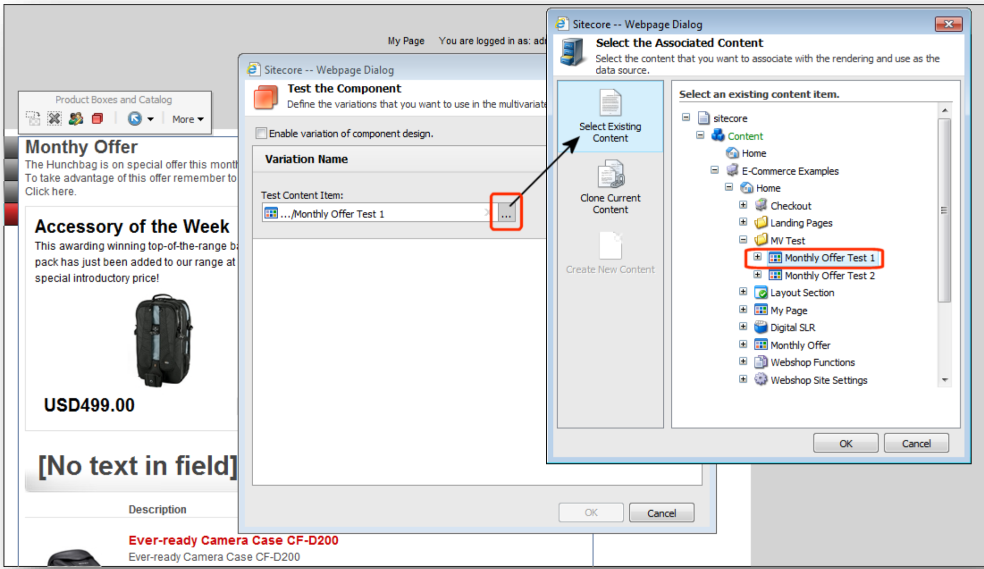
5. Click the **Test** button to open the **Test the Component** dialog box.



6. In the **Test the Component** dialog box, click **New Variation** to create a new test variation variable.



7. Browse the Sitecore content tree for test content items. Follow the same procedure for each of the components that you want to add to the test.



In this example, we use three test variables, each containing a different campaign slogan:

- *The original campaign slogan*
- *Slogan 1 (Settings)*
- *Slogan 2*

In the E-Commerce Sample Pages, select the **Product Search Group** item for each slogan.

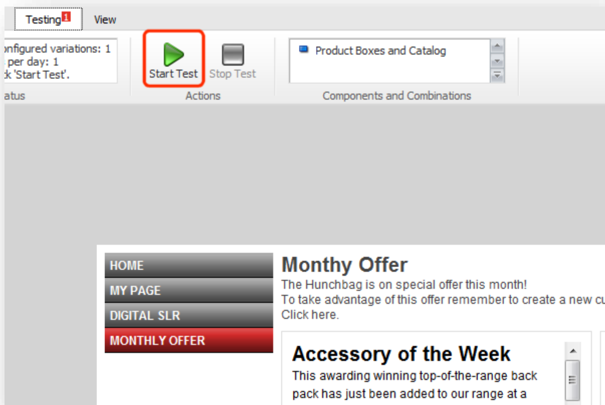
8. Add each test variable that you want to use in your test and click **OK**.

Note
In the Page Editor, *Sticky* is the default test strategy. *Sticky* means that you keep the same test variable for one session. When you create a new session you see the second test variable.

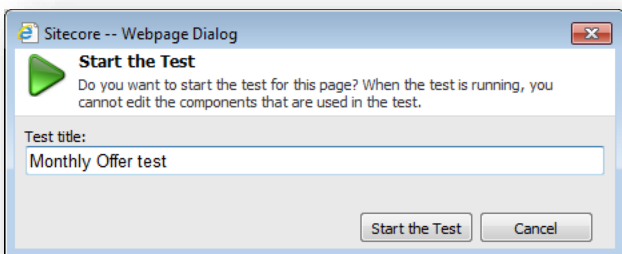
4.2 Running an MV Test

To run a multivariate test in the Page Editor:

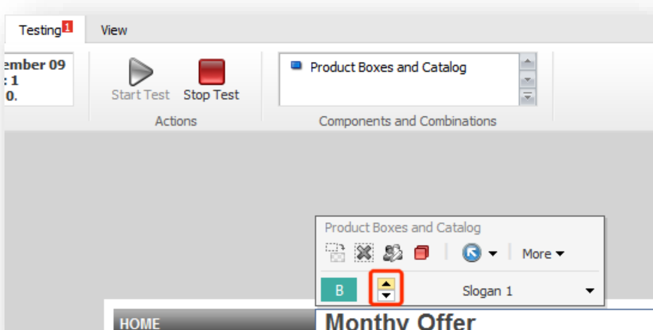
1. On the ribbon, click the **Testing** tab and then click **Start Test**.



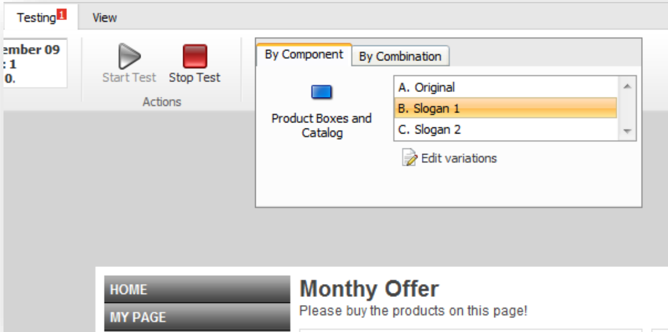
2. When you click **Start Test**, you must also enter a name for the test.



3. Click **Start the Test**.
4. In the **Page Editor**, you can preview each of your test variables before you run the test. Use the drop-down arrow to preview each test control.



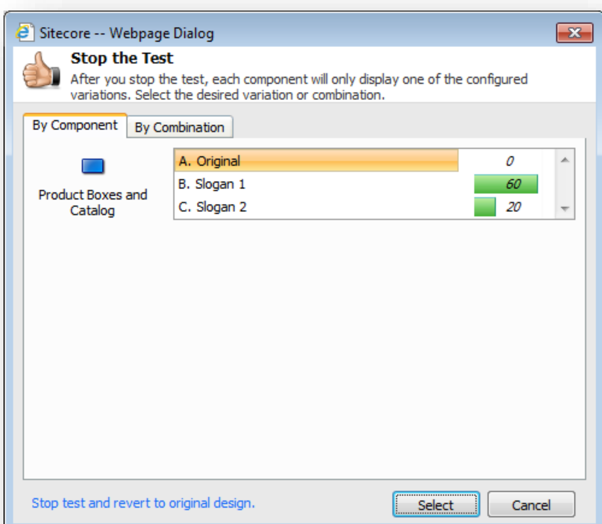
You can also use the gallery on the ribbon to select variations and get an overview of all the components in your test,



5. Run the test in a new browser window. After running the test for the required amount of time, on the ribbon, click **Stop Test**.
6. In the **Stop the Test** window, you can view all the components in your test and each possible combination. Decide which component or combination is the most successful and select a winner.

Note
You can add more than one component to a multivariate test so that you can decide which combination of controls works best on a page.

7. In Engagement Analytics, achieving goals enable site visitors to accumulate value. You can decide which variation of test variables is the most successful by the value it has generated during the test. The variation with the highest engagement value is the winner.
8. In the **Stop the Test** window, choose a winning test variation variable and click **Select**.



4.3 Evaluating MV Test Results

In the Page Editor, the *Stop the Test* dialog box displays all MV Test data in a simple report.

If you create a simple test, you could use one slogan for one week, switch to another slogan for the second week, and then compare results. Sitecore allows you to use a more dynamic approach. Select a *sticky* test strategy to display *Slogan 1* to some visitors and *Slogan 2* to others. Then compare conversion rates between the two sets of visitors. When one slogan shows better results, discard the other one.

On an e-commerce website, if you have configured your goals correctly to measure how many customers are buying your products, this can be a very effective way of optimizing your campaigns.

In the example we created the report shows that *Slogan 1* generated more responses and was therefore the most effective at bringing customers to this campaign.

In the Page Editor, you can also create combination tests that enable you to test more than one control on the same page.

For more information on MV Tests such as creating combination tests or cloning items to use as test variables, see the *Marketing Operations Cookbook*.

Chapter 5

Creating Personalization

Personalization is one of the most effective ways of increasing customer engagement on an e-commerce website. In Sitecore DMS, you can use rules and pattern cards to display different kinds of web content to different visitor target groups.

- Personalization and E-Commerce
- Personalization using Conditions and Rules
- Personalization using Pattern Cards

5.1 Personalization and E-Commerce

In the DMS use the Page Editor to create and configure personalization.

For example, you might want to promote high-end products to professional photographers and display a different set of products to beginners or amateurs.

To do this you could create a set of conditions and rules that only displays content if visitors meet certain criteria.

If you have a set of profiles and profile keys on your site that reflect different photography skill levels, then you could create rules based on profile key scores. For example, when a visitor accumulates a score that matches the rule for a professional photographer, then they only see top of the range SLR cameras and related products.

This is just one example and there are many other types of personalization rules that you can create.

Some examples of personalization rules:

- Display specific content to certain traffic types.
- Display content to a visitor that is in a specific state of an engagement plan.
- Display content when the accumulated profile value for a certain profile type is equal to a specific number.
- Display content when the engagement value points accumulated for a visitor is equal to a specific number.
- Trigger a special offer email campaign for customers that have successfully completed the checkout process.

Before you can implement personalization on your e-commerce site, you need the following pre-requisites:

- A well thought through profiling strategy, a set of profiles and profile keys.
- A set of content items to use as the data sources for personalization.

On an e-commerce website personalization can help to increase conversions, ROI, and also to ensure that valuable sales opportunities are not lost.

5.2 Personalization using Conditions and Rules

To illustrate how to personalize content on the E-Commerce web shop, we will use the *Monthly Offer* sample page as an example.

Before personalization this page displays two default products to all visitors.

After personalization the page changes dynamically to display a special offer and two products of interest to the visitor, depending on what products the visitor has viewed on the website and their skill level.

You will create personalization rules for each skill level of visitor.

Checklist of tasks:

- Create content items to use as a data source.
- Choose a page on your website to personalize.
- In the Page Editor, create personalization rules.
- Use the Page Editor to preview your personalization rules.

Create some rules that determine the products the visitor will see. You can base these rules on pattern cards or the profile scores that the visitor accumulates when they visit the site. These scores reflect the photography skill level of the visitor.

Personalization plan:

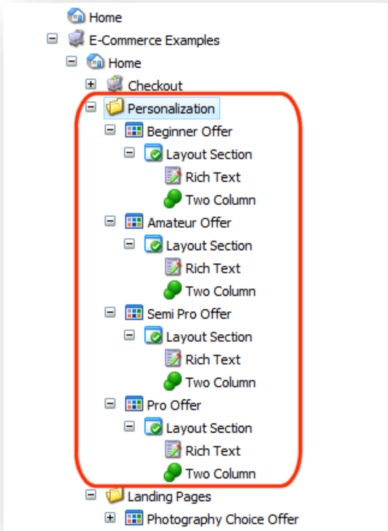
Skill Level	**Rule**	**Product Displayed**
Beginner	*Beginner* profile key value greater than 20.	• Coolpix P60 • Coolpix S200
Amateur	*Amateur* profile key value greater than 20.	• Coolpix S200 • D200
Semi Pro	*Semi Pro* profile key value greater than 20.	• D3 • SB 600
Professional	*Professional* profile key value greater than 20.	• D3 • 14mm f 2 8D ED AF NIKKOR

In the content tree, create four new content items for each photography special offer you want to display.

To create content for personalization:

1. In the **Content Editor**, content tree, create a folder called *Personalization*.
2. Select the campaign landing page, *Monthly Offer*.
3. Right click the *Monthly Offer* page and click **Duplicate**.
4. Rename this duplicate item to *Beginner Offer* and move it to the **Personalization** folder.

5. Repeat this process until you have four new content items in the **Personalization** folder.



6. Add the following text and products to each content item:

Name	Text (Rich Text Layout)	Products (Two Column Layout)
Beginner Offer	*Looking for a compact and easy to use camera?*	• Coolpix P60 • Coolpix S200
Amateur Offer	*Are you a serious amateur?*	• Coolpix S200 • D200
Semi Pro Offer	*Take your passion for photography to the next level!*	• D3 • SB 600
Pro Offer	*The professional choice!*	• D3 • 14mm f 2 8D ED AF NIKKOR

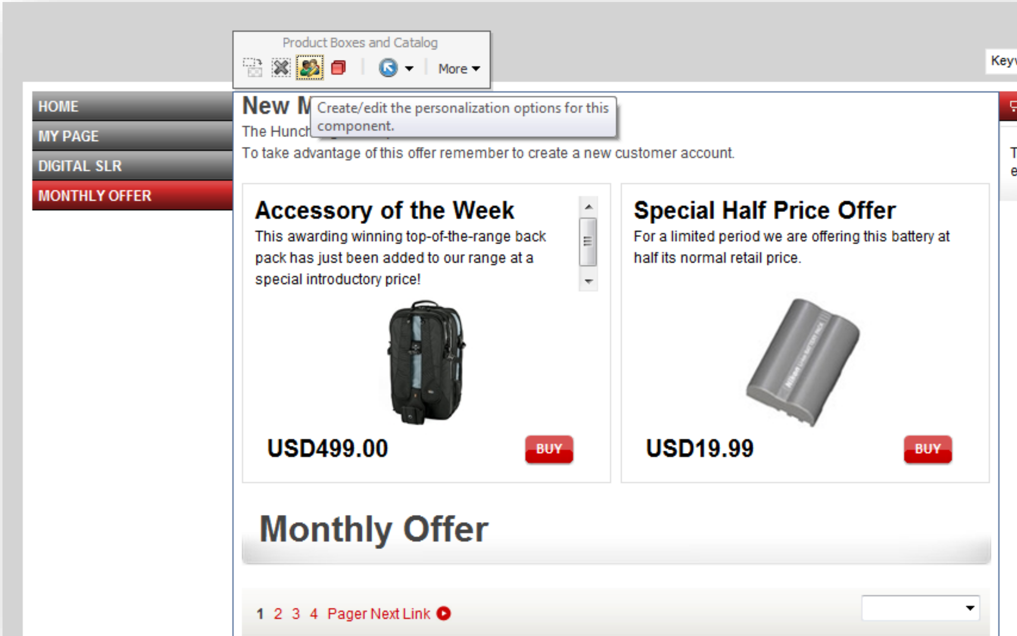
7. On the ribbon, click **Save**.

Now create a condition and a rule for each special offer.

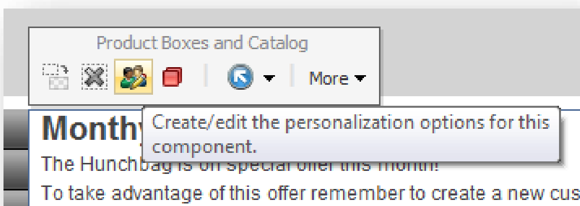
To create personalization rules in the Page Editor:

1. Open the Page Editor.
2. Navigate to the page that you want to personalize. In this example, we will use the *Monthly Offer* page.

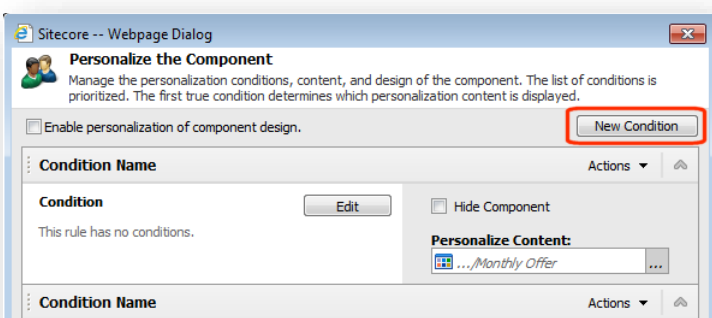
3. Select the area of the page that you want to personalize. For example, **Product Boxes and Catalog** rendering.



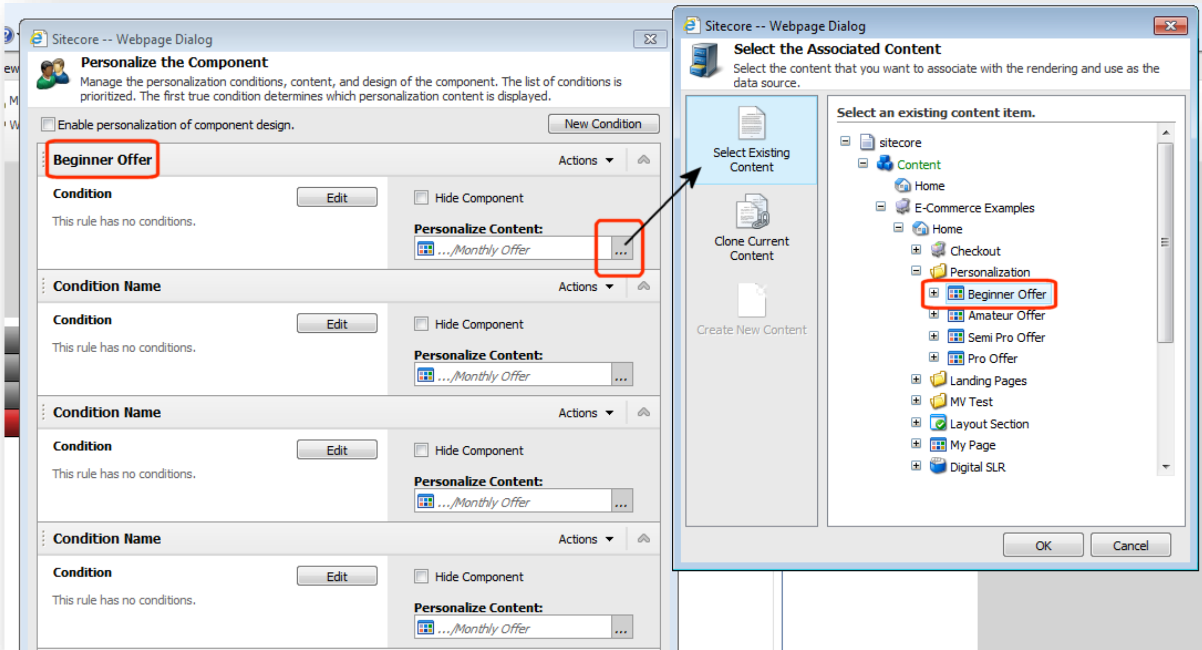
4. In the floating toolbar, click on the *Create/edit personalization options for this component*.



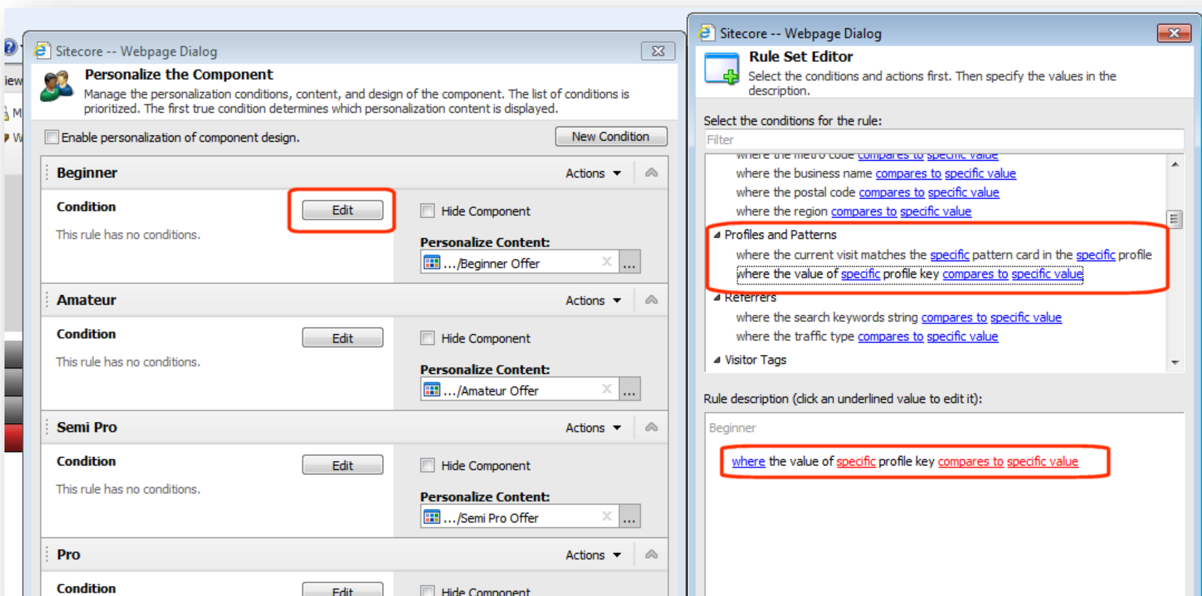
5. In the **Personalize the Component** dialog box, create four new conditions. Click *New Condition*.



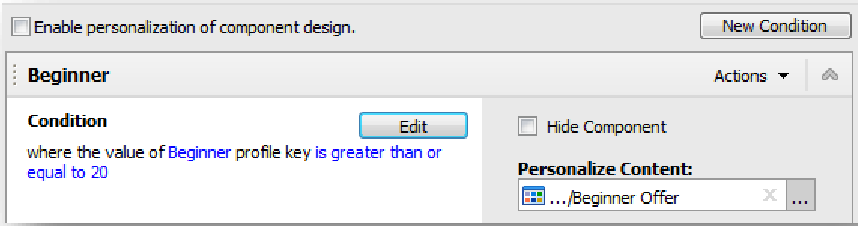
Name the first condition *Beginner Offer*. In the **Personalize Content** field, browse the content tree for the *Beginner Offer* content item you created earlier:



6. Click **OK**.
7. Click **Edit** to create a personalization rule for this condition.



The Beginner personalization rule:

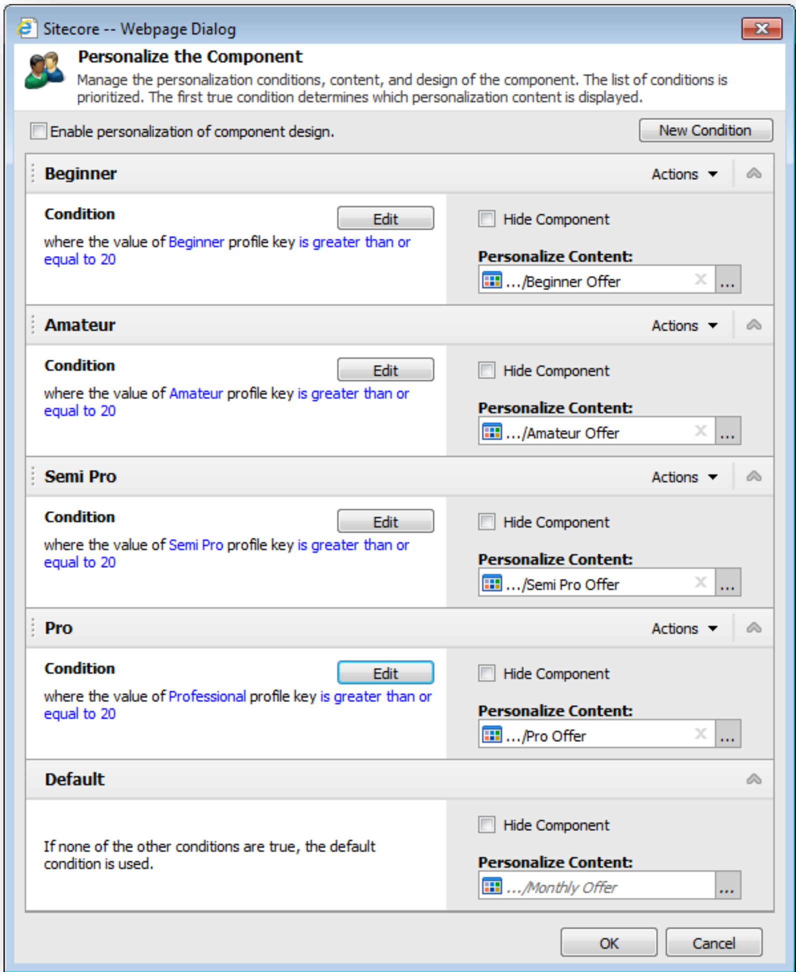


8. Use the following table to create the rest of the conditions:

Condition Name	Rule	Content
Pro	Where the value of the *Professional* profile key is greater than or equal to 20	Display *Pro Offer*
Semi Pro	Where the value of the *Semi Pro* profile key is greater than or equal to 20	Display *Semi Pro Offer*
Amateur	Where the value of the *Amateur* profile key is greater than or equal to 20	Display *Amateur Offer*
Beginner	Where the value of the *Beginner* profile key is greater than or equal to 20	Display *Beginner Offer*

Note
You need to assign appropriate profile cards to each product or other content items as a pre-requisite of personalization.

Monthly Offer personalization rules:



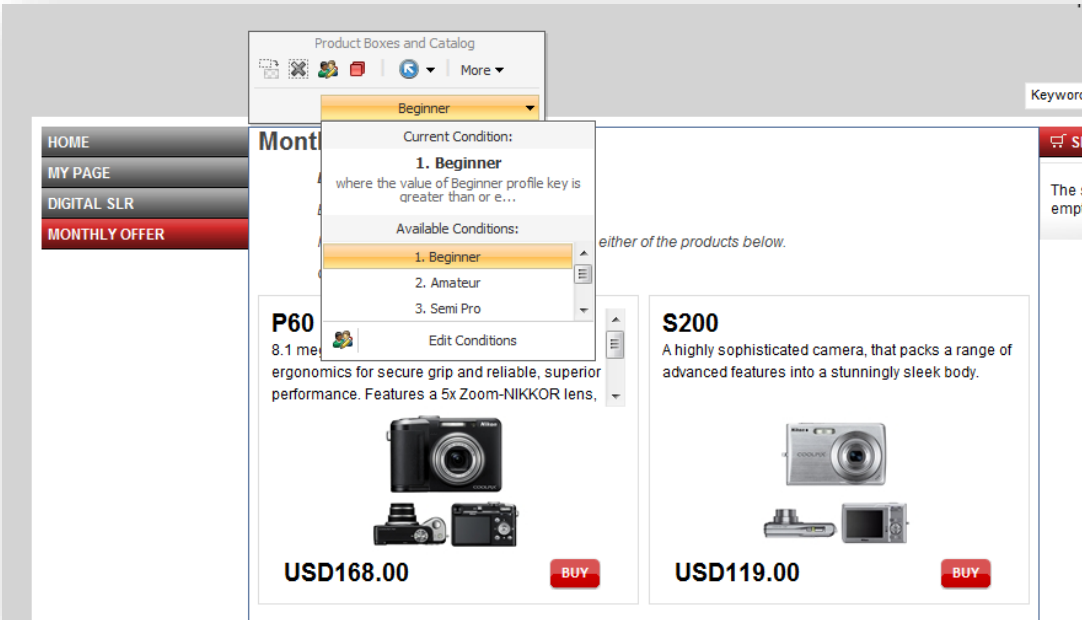
9. Remember to keep the **Default** condition, then click **OK** to save your changes.

Note
If none of the other conditions are in use, then the default condition is displayed.

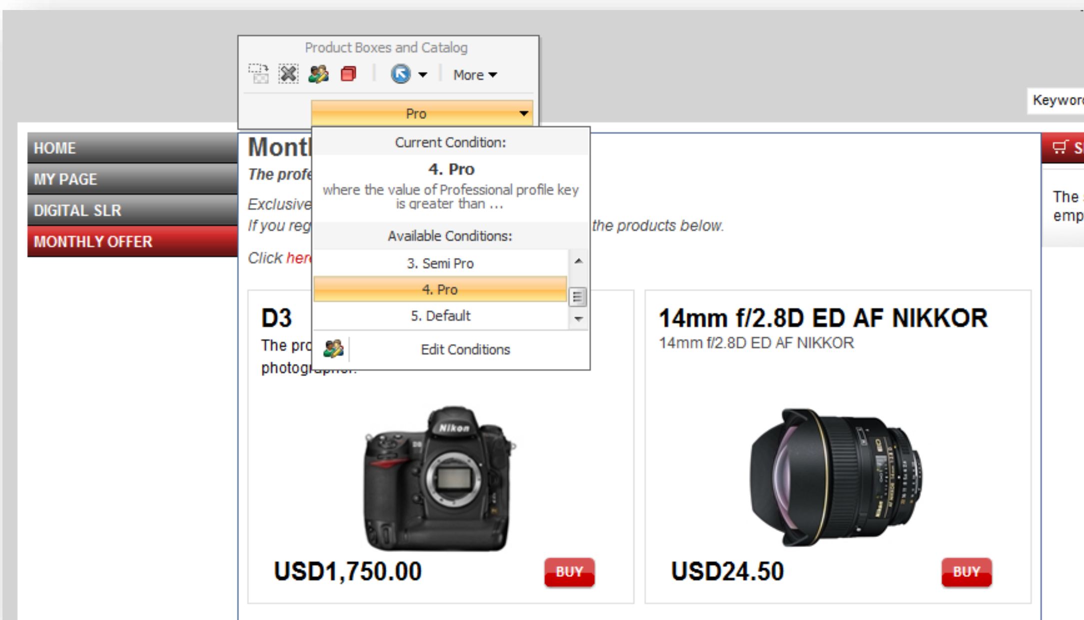
To preview personalization in the Page Editor:

1. Open the Page Editor.
2. In the floating toolbar for the *Product Boxes and Catalog* rendering, you can see select each of the personalization conditions that you created.

Preview of the Beginner Offer:



Preview of the Pro Offer:

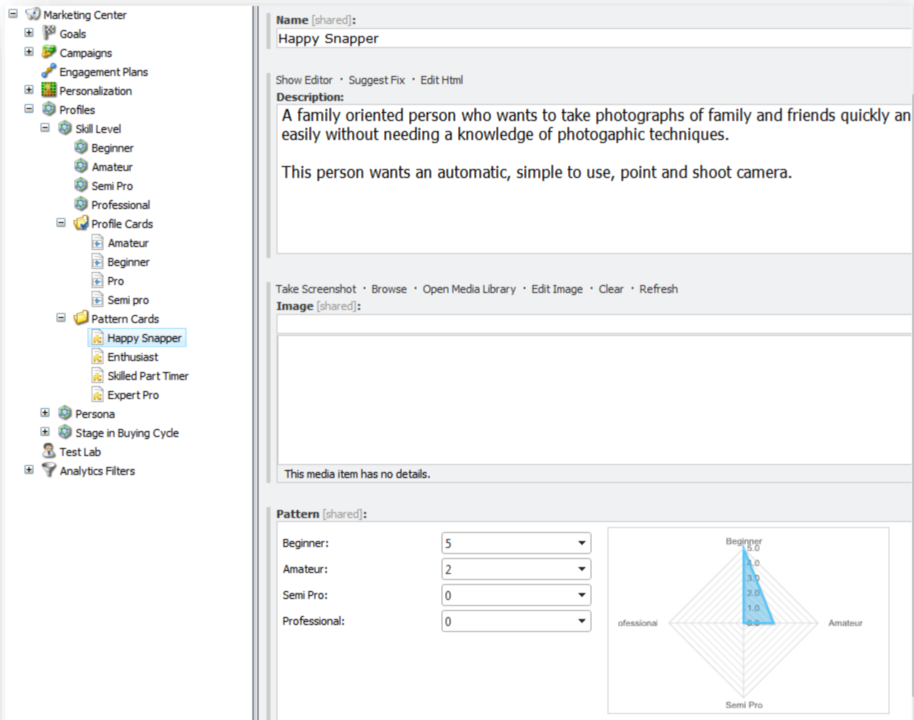


In the Page Editor, it is possible to view all the conditions that you created but you can also continue to make changes to each condition if required.

Personalization using Pattern Cards

In the DMS, you can also use pattern cards to create personalization. Pattern cards enable you to create a set of pre-defined profile values for select target groups. When a visitor comes to your website, Sitecore uses pattern matching technology to map visitors to the pattern card that most closely matches the browsing behavior and interests of the visitor. For example, you could create a set of pattern cards for photography skill levels.

Example of a pattern card called Happy Snapper (beginner skill level):



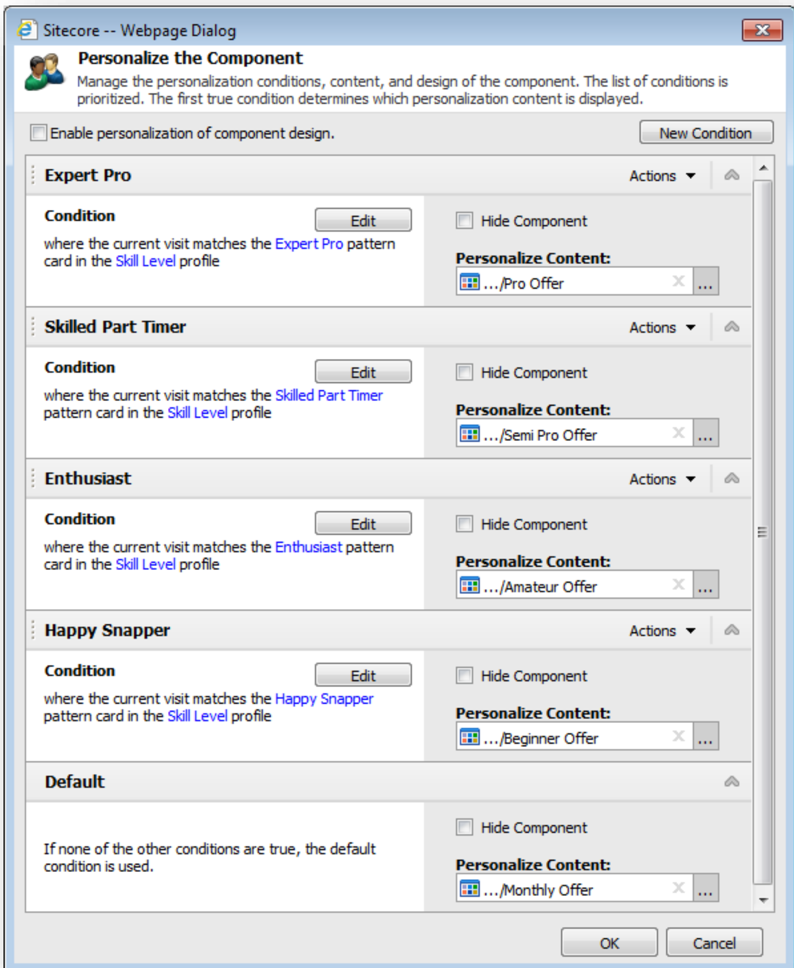
In the Page Editor, you could add a condition that displays specific content to any visitors that match this pattern card. For example, only display compact *point and shoot* cameras. Select this pattern card when you create the rule for the condition and then create a set of conditions that use pattern cards to match different visitors to different skill levels.

Create the following conditions:

Condition Name	Rule	Content to Display
Expert Pro	Where the current visitor matches the *Expert Pro* pattern card in the *Skill Level* profile.	Display *Pro Offer*
Skilled Part Timer	Where the current visitor matches the *Skilled Part Timer* pattern card in the *Skill Level* profile.	Display *Semi Pro Offer*

Condition Name	Rule	Content to Display
Enthusiast	Where the current visitor matches the *Enthusiast* pattern card in the *Skill Level* profile.	Display *Amateur Offer*
Happy Snapper	Where the current visitor matches the *Happy Snapper* pattern card in the *Skill Level* profile.	Display *Beginner Offer*

The pattern card conditions in the **Personalize the Component** dialog box:



Pattern cards enable you to personalize content so that you can target specific market segments.

Personalization is a very powerful e-commerce marketing tool. If you use it correctly, it can be a very effective way of increasing your website conversion rate and ROI.

Chapter 6

Analyzing Visitor Behavior

This chapter explains how to use Sitecore DMS reports with Sitecore E-Commerce Services.

DMS reports enable you to analyze the effectiveness of your e-commerce website and track the shopping behavior of your customers.

This chapter contains the following sections:

- DMS Reports
- Web Forms Reports

6.1 DMS Reports

In Sitecore E-Commerce Services, you can use standard Engagement Analytics reports to track visitor and customer behavior.

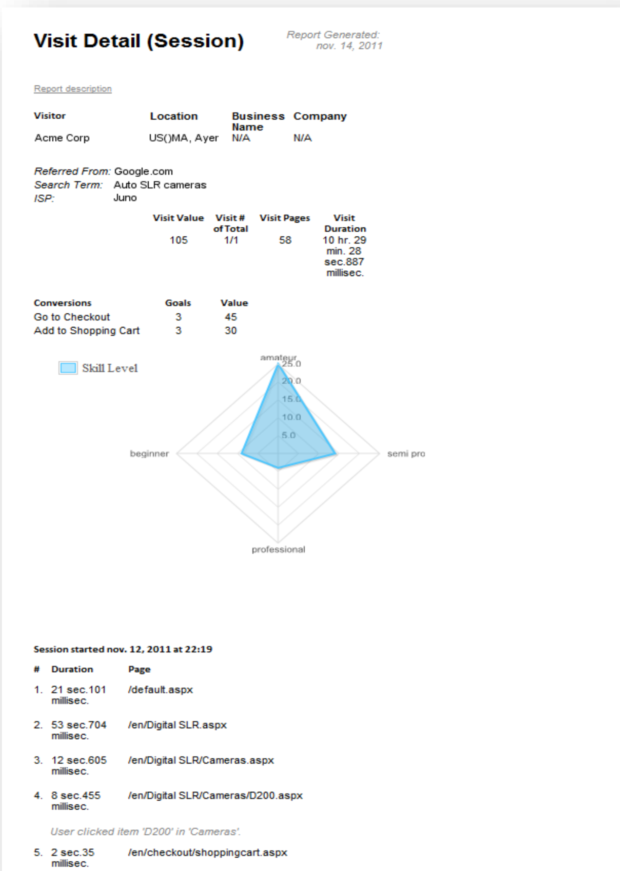
The DMS lets you track customers and the actions they take as they make their way through the shopping process. The *Latest Visits* report displays a list of all visitor sessions and all pages visited. This includes products added to the shopping cart, form data, and all purchases made by each customer. The session trail displays the visitor's IP address and organization name, but individual customer names are not included in the standard DMS reports.

6.1.1 Visit Detail (Session) Report

In Engagement Analytics, under *Recent Activity*, the *Latest Visits* report gives you detailed visitor information, a breakdown of the pages visited (the session trail), along with any information entered on forms in your webshop.

The Visit Detail (Session) Report

A typical session report for SES sample pages showing visitor information and the URLs of pages accessed during a session:



Visit Detail (Session)

Report Generated: nov. 14, 2011

Report description

Visitor	Location	Business Name	Company
Acme Corp	US()MA, Ayer	N/A	N/A

Referred From: Google.com
Search Term: Auto SLR cameras
ISP: Juno

Visit Value	Visit # of Total	Visit Pages	Visit Duration
105	1/1	58	10 hr. 29 min. 28 sec.887 millisec.

Conversions	Goals	Value
Go to Checkout	3	45
Add to Shopping Cart	3	30

Session started nov. 12, 2011 at 22:19

#	Duration	Page
1.	21 sec.101 millisec.	/default.aspx
2.	53 sec.704 millisec.	/en/Digital SLR.aspx
3.	12 sec.605 millisec.	/en/Digital SLR/Cameras.aspx
4.	8 sec.455 millisec.	/en/Digital SLR/Cameras/D200.aspx
	User clicked item 'D200' in 'Cameras'.	
5.	2 sec.35 millisec.	/en/checkout/shoppingcart.aspx

The standard visitor information displayed on the Visit Detail report includes:

- Visitor — the name of the company or organization.
- Location — visitor country and city of origin (based on IP address).
- Business Name — business name of website address.
- Company — the name of the company or organization.
- Referred From — website where the search originated, for example Google.com.
- Search Term — search engine, search term used to find the website.
- ISP — the name of the visitor's Internet Service Provider.
- Visit Value — total engagement value accumulated during a visit
- Visit # of Total — the number of the visit in relation to the total number of visits.
- Visit Pages — the number of pages viewed on the site during a visit.
- Visit Duration — the length of time that the visit lasted.
- Conversions — name of the goal conversion.
- Goals — number of times a goal has been converted during a visit.
- Value — total engagement value accumulated during a visit.
- Profile values — radar diagrams displaying the accumulated visitor profile scores for each profile key.

When you use SES with DMS, the Visit Detail (session) report also includes useful additional information about the customer's shopping activities such as:

- Products viewed.
- Products added to the shopping cart.
- Stages completed in the checkout process.
- Forms accessed.
- Information entered into form fields (even if incomplete).
- Changes made before submitting a form.
- Form validation error messages.

For example, when a customer adds a product to the shopping cart, this appears in the session trail. If a customer adds a product to the shopping cart, this triggers a Sitecore page event. You can configure your e-commerce installation to show all the page events in the session trail or decide which ones you want to show.

Note
If you decide to display all Page Events on the *Latest Visits* report, this can affect the performance of your e-commerce website.

Analyzing E-Commerce Web Forms

When a customer completes a form on your webshop, all the form values that the visitor enters appear in the session report. This includes any changes made and any validation error messages displayed during the session.

In the following example, a visitor has selected some products and proceeded through the checkout process. You can see the products added to the shopping cart and all pages accessed during the checkout process. All the values entered by the visitor in the various forms also appear in the session report, including a small change that the visitor made to the *Address* field.

00:00:00	/ User clicked login link.
00:00:04	/en/functions/authentication/login.aspx User clicked 'Login' User clicked 'Login' Userreg@register.it login succeded. (Create a Customer Account or Log In) Form Submit
00:00:21	/en.aspx
00:01:23	/sitecore/content/Examples/Home/mypage/orderhistory
00:01:31	/en/mypage/orderhistory/orderdetails.aspx
00:01:44	/en/mypage/orderhistory/orderdetails.aspx
00:01:46	/en.aspx User added 1 'Ever-ready Camera Case CF-D200' at 549 to the shopping cart.
00:01:51	/layouts/ecommerce/Examples/Ajax.aspx/LoadSublayout User added 1 'Ever-ready Camera Case CF-D200' at 549 to the shopping cart.
00:01:52	/layouts/ecommerce/Examples/Ajax.aspx/LoadSublayout User added 1 'Ever-ready Camera Case CF-D200' at 549 to the shopping cart.
00:01:53	/layouts/ecommerce/Examples/Ajax.aspx/LoadSublayout User clicked 'Checkout' User viewed the shopping cart. User viewed the shopping cart.
00:02:38	/en/checkout/customerdetails.aspx User clicked 'Next'. (Customer Details) Use a different shipping address.: 1 (Customer Details) Name:: birthday girl (Customer Details) Address:: birthday road 4 (Customer Details) Zip:: 4321 (Customer Details) Country:: Antarctica (Customer Details) City:: guano city (Customer Details) Address:: birthday road 41 (Customer Details) Form Submit (Customer Details) Field Not Completed (Customer Details) Field Not Completed (Customer Details) State:: Mississippi (Customer Details) Form Submit (Customer Details) Field Not Completed (Customer Details) City:: Springfield (Customer Details) Form Submit
00:04:20	/en/checkout/payment.aspx User selected the 'Checking Account' payment method. User clicked 'Confirm' and confirmed the order.
00:05:41	/en/checkout/confirmation.aspx

Furthermore, if a visitor completes a form incorrectly, their errors also appear in the session trail.

In the next example, a site visitor has attempted to complete the *Create Account* form. The visitor has not completed two required fields and has also not created a password for their new user account.

00:00:00	/
00:00:04	/en/Company.aspx
00:00:06	/en/Company/CreateNewAccount.aspx User registered an User Account [Goal] (Create New Account) Name:: Henning (Create New Account) Address:: Plangatan 23 (Create New Account) Country:: Denmark (Create New Account) Email:: hen@ (Create New Account) Email:: hen@hotmail.com (Create New Account) Form Submit (Create New Account) Field Not Completed: You must enter a value in the Zip Code: field. (Create New Account) Field Not Completed: You must enter a value in the City field. (Create New Account) Field Not Completed: You must enter a value in the Username: field. (Create New Account) Field Out of Boundary: The Confirm Password: must have at least 6 and no more than 256 characters. (Create New Account) Field Not Completed: Confirm Password: must be filled in. (Create New Account) Field Not Completed: You must enter a value in the Password: field. (Create New Account) Field Out of Boundary: The field 'Password:' contains forbidden count of chars. (Create New Account) Zip Code:: 2345 (Create New Account) City: Copenhagen (Create New Account) Form Submit (Create New Account) Field Not Completed: You must enter a value in the Username: field. (Create New Account) Field Out of Boundary: The Confirm Password: must have at least 6 and no more than 256 characters. (Create New Account) Field Not Completed: Confirm Password: must be filled in. (Create New Account) Field Not Completed: You must enter a value in the Password: field. (Create New Account) Field Out of Boundary: The field 'Password:' contains forbidden count of chars. (Create New Account) Username:: Henning (Create New Account) Password: : Password: (Create New Account) Password: : Confirmation: (Create New Account) Form Submit (Create New Account) Invalid Field Syntax: The Password: and Confirm Password: fields must be the same. (Create New Account) Password: : Password: (Create New Account) Password: : Confirmation: (Create New Account) News Letter:: 1 (Create New Account) Form Submit
00:02:47	/en/Products.aspx
00:02:48	/

All the form validation error messages the visitor receives after attempting to submit the form also appear in the session report.

(Create New Account) Form Submit
(Create New Account) Field Not Completed: You must enter a value in the Zip Code: field.
(Create New Account) Field Not Completed: You must enter a value in the City field.
(Create New Account) Field Not Completed: You must enter a value in the Username: field.

If you use the DMS Marketing Center to create goals, campaigns, or visitor personalization on your e-commerce website, when a visitor triggers a DMS event it is automatically recorded in the Session report.

In the earlier example, the *Create Account* form has a goal associated with it which is triggered when a visitor creates a new user account and submits the form. You can also see this event displayed in the Session report.

00:01:00	/en/Company/CreateNewAccount.aspx User registered an User Account [Goal]

Analyzing Customer Behavior

If you combine the information provided in standard Sitecore DMS reports with web forms, you have a powerful tool to analyze the behavior of all the visitors and customers that come to your e-commerce website.

In a typical E-Commerce and DMS session report, you can see:

- Name of visitor organization.
- Country of origin.
- Duration of the visit.
- Products viewed on the webshop.
- Products purchased.
- Forms completed.
- Goals completed.
- Campaigns.
- Update the Shopping Cart
- Empty the Shopping Cart
- Change Delivery option.
- Complete the Delivery page.
- Complete the Payment page.

The following session trail contains more detailed information about the shopping behavior of a customer during a single visitor session:

00:00:00	/ User added 1 'D200' at 2150 to the shopping cart.
00:00:06	/layouts/ecommerce/Ajax.aspx/LoadSublayout
00:00:08	/en/Functions/ShoppingCart.aspx User emptied the shopping cart and removed a total of 0 items.
00:00:10	/en.aspx User added 1 'S200' at 129 to the shopping cart.
00:00:16	/layouts/ecommerce/Ajax.aspx/LoadSublayout
00:00:17	/en/Products.aspx
00:00:19	/ User added 1 '105mm f/2.8G AF-S VR Micro NIKKOR ' at 23 to the shopping cart.
00:00:21	/layouts/ecommerce/Ajax.aspx/LoadSublayout User added 1 'Ever-ready Camera Case CF-D200' at 559 to the shopping cart.
00:00:22	/layouts/ecommerce/Ajax.aspx/LoadSublayout
00:00:25	/en/Functions/ShoppingCart.aspx User updated the shopping cart. User added 2 'Ever-ready Camera Case CF-D200' at 559 to the shopping cart. User clicked 'Continue Shopping'.
00:00:33	/en.aspx
00:00:36	/en/Functions/CheckOutProcess/NameAndAddress.aspx (Login) UserName: Oscar (Login) Password: (Login) Form Submit
00:00:47	/en/Functions/CheckOutProcess/NameAndAddress.aspx User clicked 'Next'. User selected delivery alternative: 'Post Denmark'. User clicked 'Next'. The user selected delivery option: 'Post DK', and notification option: 'Email' 'red@ghshgs.com'. User clicked 'Confirm' and confirmed the order. User selected the 'Amazon' payment method. User selected the 'Amazon' payment method. User selected the 'Amazon' payment method. User selected the 'Amazon' payment method. (Name and Address) Form Submit
00:01:03	/en/Functions/CheckOutProcess/Payment.aspx
00:01:07	/en/Functions/CheckOutProcess/Payment.aspx
00:02:35	/en/Functions/CheckOutProcess/Confirmation.aspx
00:03:26	/en/Products.aspx
00:03:27	/ User logged out.
00:03:30	/en/Products.aspx

This report gives a complete breakdown of a single customer's actions during one visit to the webshop.

During this session the visitor:

- Added a product to the shopping cart.
- Emptied the shopping cart.
- Added another product to the shopping cart.
- Changed the quantity of products.
- Updated the shopping cart.
- Continued shopping.
- Began the checkout process.
- Logged in as a returning customer.
- Selected a delivery, notification, and payment option.

- Clicked confirm and submitted the order.
- Logged out and then navigated to the *Products* page.

These events all appear as standard in the *Recent Activity* reports.

If you use all the information available in the *Latest Visits* report, it can help you to:

- Optimize your product range.
- Adjust goals.
- Optimize campaigns.
- Improve the checkout process.
- Make your e-commerce website more successful.

Note
Some of the screenshots used in this section are from Sitecore OMS. In Sitecore DMS, the overall look and styling of some of the reports may be slightly different.

6.2 Web Forms Reports

Every web form has its own set of analytics reports in addition to the standard Engagement Analytics reports.

Important Note
Sitecore E-Commerce Services uses Web Forms for Marketers version 2.3.0.

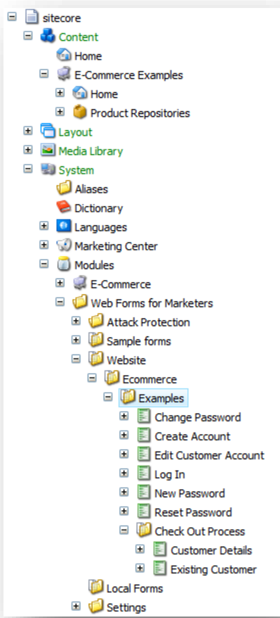
Some of the reports covered in this section may have changed.

For more information on *Web Forms for Marketers version 2.3.0.*, see *Web Forms for Marketers 2.3 for Sitecore CMS 6.5 and later – User Guide*

To view web forms reports:

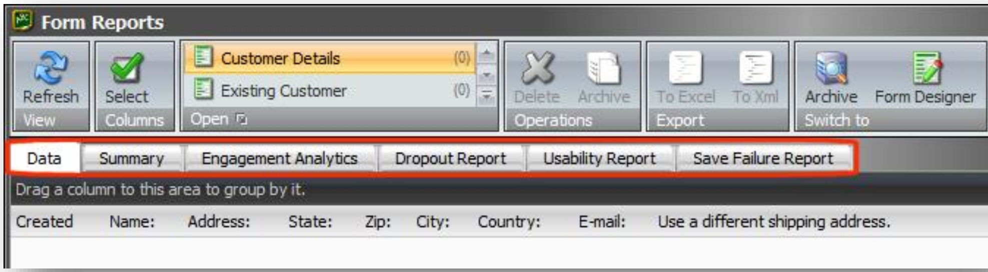
1. In the **Content Editor**, content tree, navigate to:

   `/sitecore/system/Modules/Web Forms for Marketers/Website/Ecommerce/Examples`



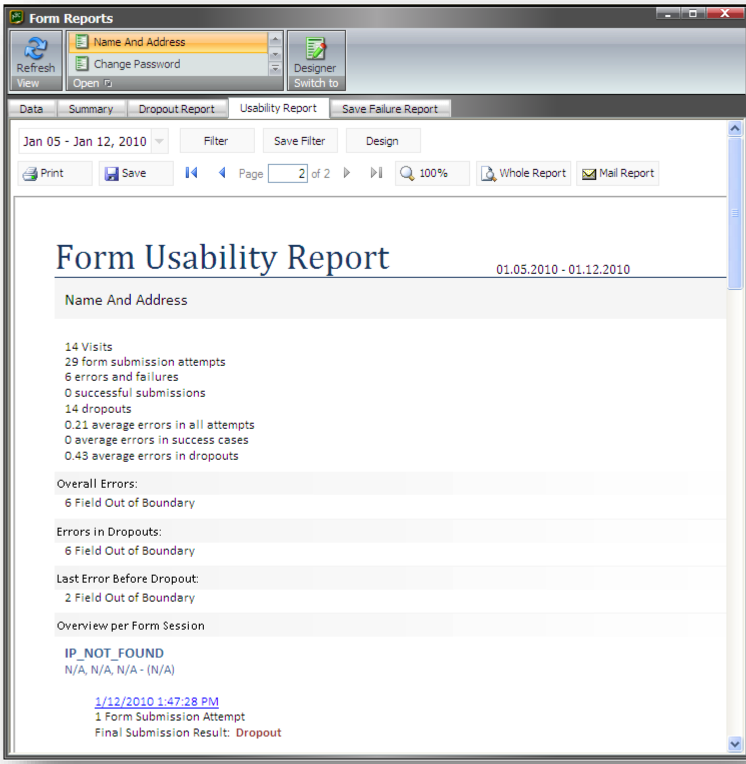
2. Select a form, for example, *Customer Details* and the **Forms** tab appears in the ribbon.
3. In the **Forms** tab, **Form** group, click **Form Reports**.

4. The **Form Reports** window displays the following default reports for the current form.



Report	**Description**
Data	Displays all the data entered on a form. The data is displayed in columns that can be filtered and sorted.
Summary	The values entered in each field on a form. The number of responses for each field. The percentage of visitors who made each response.
Engagement Analytics	Displays the Executive Insight Dashboard, Goals and Conversion chart.
Drop-out Report	Displays the values entered by visitors that failed to complete or submit a form. This report shows all the values entered by a visitor before they left a form.
Usability Report	Displays statistics for all form sessions and the form usage behavior for all the site visitors.
Save Failure Report	Displays statistics for every failed form submission.

5. Select a tab, to view a report. For example, to find out more about the usability of your web forms, click **Usability Report**.



Note
You must have the appropriate access rights and permissions to view web form reports.

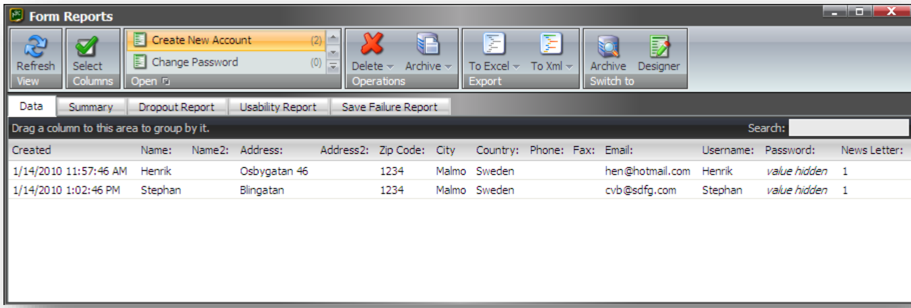
6.2.1 Form Reports

This section contains more detailed information about each of the standard web form reports and explains how they can help you to analyze the behavior of customers on your e-commerce website.

Note
The example reports in this section come from a different version of Sitecore E-Commerce.

Data Report

The *Data* report displays all the data that has been entered on the current form. This functionality only applies to forms that have been submitted successfully and have had the *Save to Database* save action assigned to them.

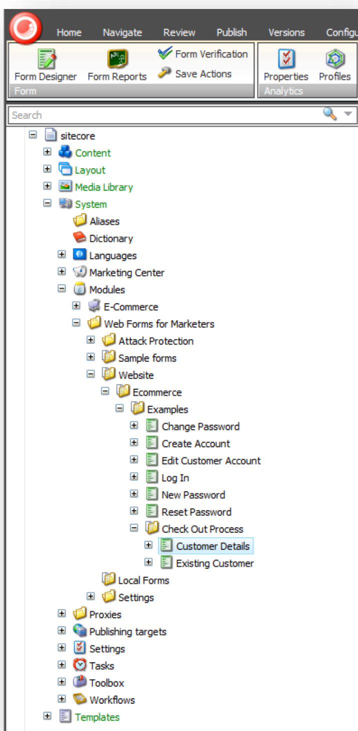


For example, this could be useful if you want to find all the contact details for registered customers. You can also sort or group information to make it easier to find specific details such as a customer's e-mail address.

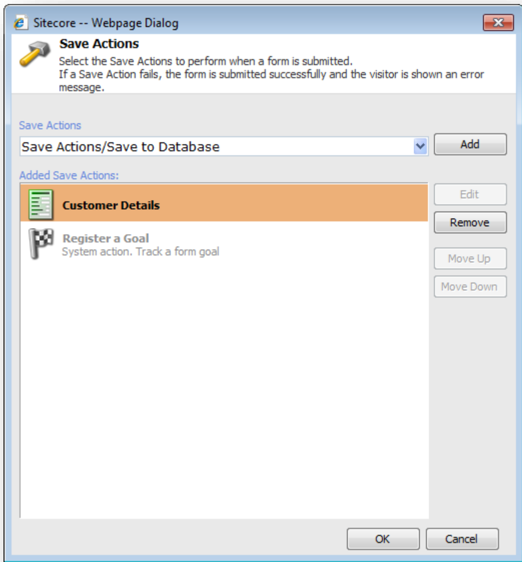
The Form Reports ribbon also allows you to export form data as an Excel spreadsheet.

To add the *Save to Database* save action to a report:

1. In the **Content Editor**, navigate to the form.



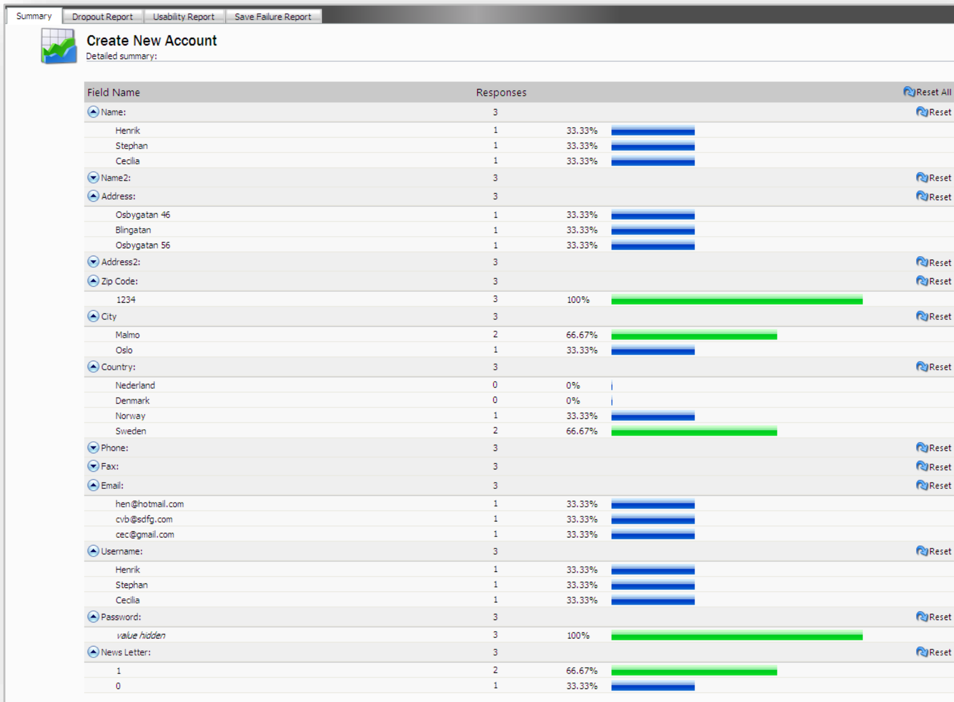
2. Select the form and then in the **Forms** tab, in the **Form** group click **Save Actions**.



3. In the **Save Actions** dialog box, in the **Save Actions** field, select the *Save to Database* and then click **Add**.

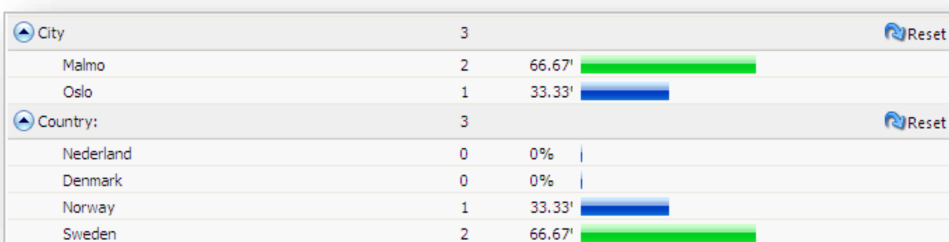
Summary Report

The *Summary* report tab displays the values entered into each field on the current form. You can see all the values entered and the percentage of site visitors that made each response.

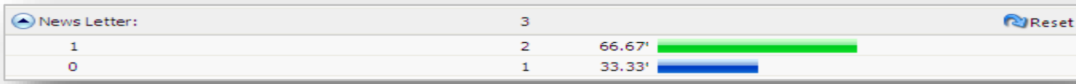


On an e-commerce website with multiple forms, this might help you to get an overview of the responses made by visitors who used this form.

In this example, the **City** and **Country** fields give you a breakdown of where your site visitors originated from. This could help when you start visitor segmentation.

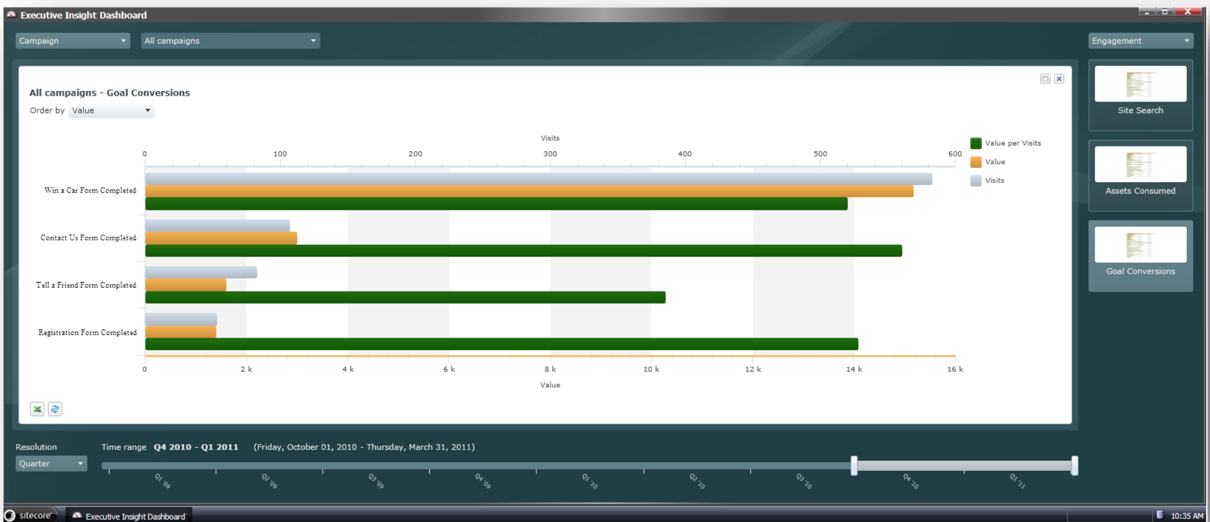


The **Newsletter** field shows you the percentage of visitors that selected the *Subscribe to Newsletter* check box. This may be useful to the marketing department when analyzing their e-mail campaign strategy.



Engagement Analytics Report

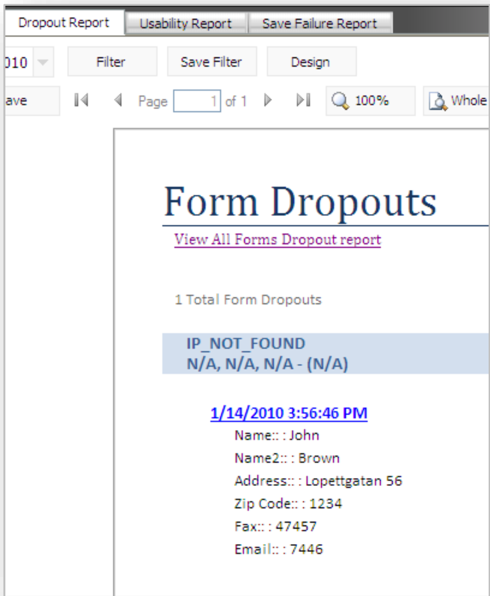
The Engagement Analytics report tab displays the Executive Insight Dashboard, Goals and Conversions chart. This chart gives you an overview of goals converted on the website and related to the selected web form.



For more information on the Engagement Analytics report tab, see *Web Forms for Marketers 2.3 for Sitecore CMS 6.5 and later – User Guide*

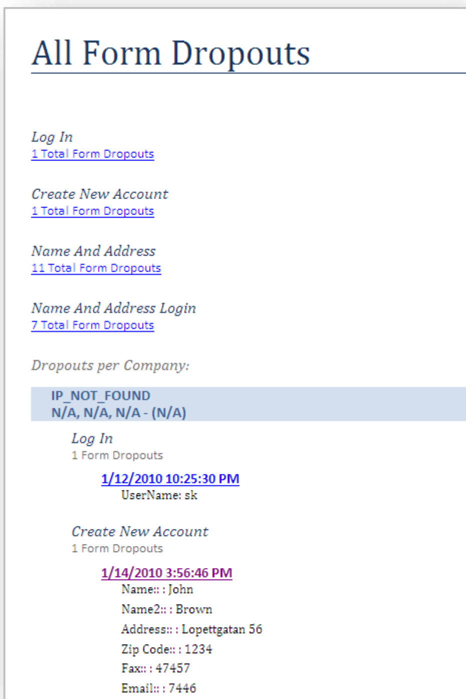
Dropout Report

The *Dropout* report shows all sessions where a visitor navigated away from a form without submitting it. You can see all the information entered in each field before the visitor left the form. This can be very useful in helping you to find out why a visitor decided to leave a form. It may also provide sales people with useful customer contact information that might otherwise be lost.



The *Dropout* report shows dropouts for the current report. If you click the timestamp link you can view the details of the session report for this visit which shows all the pages visited and all the form fields completed by the visitor during this session.

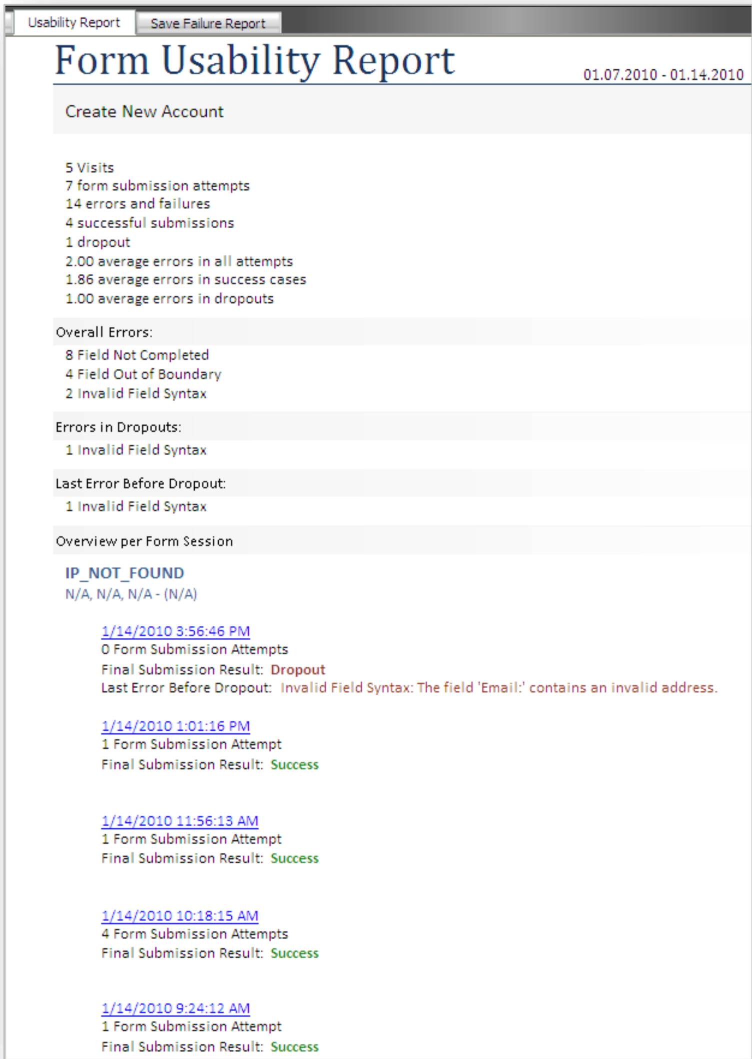
Click *View All Forms dropout report* to see the dropouts for all forms.



On an e-commerce website, having accurate form drop out data captured during the check out process could help you to find out why some customers decided not to purchase products on your webshop. This information could enable you to optimize your check out process, increase your conversion rate, and improve your ROI. Drop out reports are available on all the forms created with Web Forms for Marketers.

Usability Report

The *Usability* report gives you an overview of all the data entered on the current form. In the following example, the *Create New Account* form has had 5 visits and 7 form submission attempts. You can also see all the errors and dropouts on this form as well as all the successful submissions.



On an e-commerce website this report could provide you with useful information about the behavior of your site visitors and customers. In the previous example, it might help you to improve the *Create New Account* form which might in turn lead to more visitors successfully registering as customers and therefore buying more products.

Save Failure Report

The *Save Failure* report displays all the forms that contain save actions that have failed.

Save actions include:

- Send Mail
- Register a Goal
- Register as a Conversion

If a form has a save action associated with it, the *Save Failure Report* records if and when this save action failed.

The *Save Failure* report for a *Name and Address* login form:

6.2.2 Enabling Engagement Analytics

In Web Forms for Marketers, you have the option to enable several analytics options on each form. You can switch on Engagement Analytics functionality, associate a goal with a form, or enable dropout tracking.

Enabling Web Forms Reports

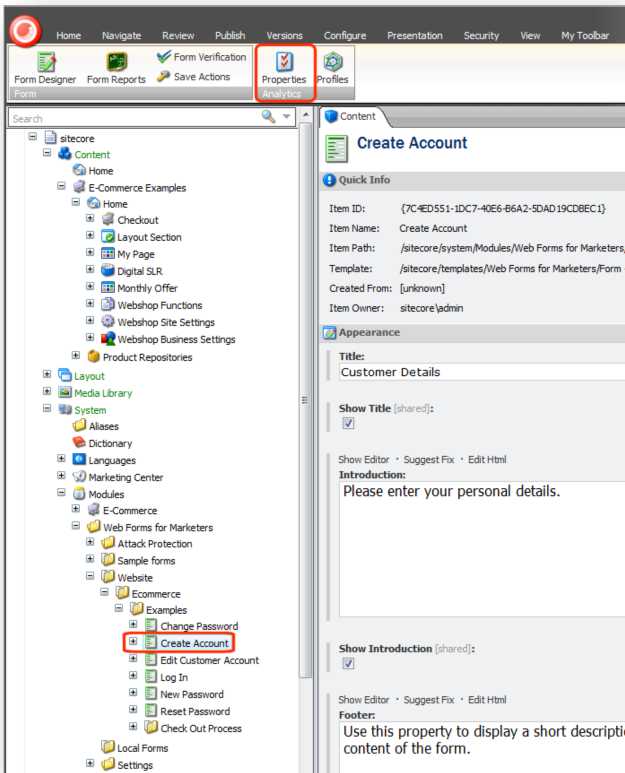
You need to enable the following reports in the form properties dialog box before you can view them in the Form Reports window:

- Dropout, Form report
- Usability report
- Save Failure report

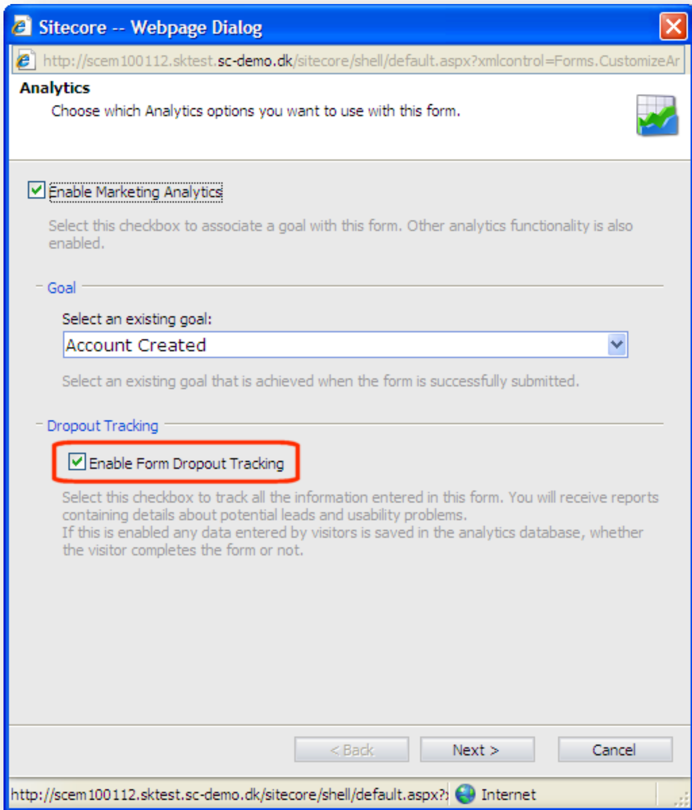
For example, to enable *Form Dropout Tracking* in web forms:

1. Open the **Content Editor**.
2. Navigate to the *Web Forms for Marketers* node.

   `/sitecore/system/Modules/Web Forms for Marketers`
3. Select a web form, for example, *Create Account*.

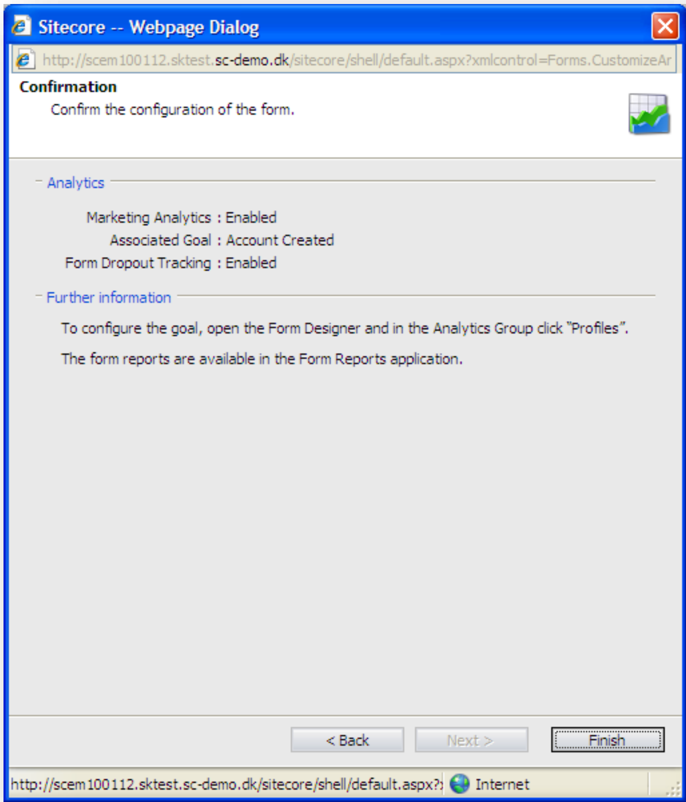


4. In the **Forms** tab, in the **Analytics** group, click **Properties** and the **Analytics** dialog box appears.



5. In the **Analytics** dialog box, select the option **Enable Form Dropout Tracking**, and then click **Next**.

6. In the second page of the wizard you can see all the analytics options that you have enabled. Click **Finish** to save your changes and close the **Analytics** dialog box.



For more information on form reports, see the *Web Forms for Marketers 2.3 for Sitecore CMS 6.5 and later – User Guide*.

Enabling Analytics Form Tags

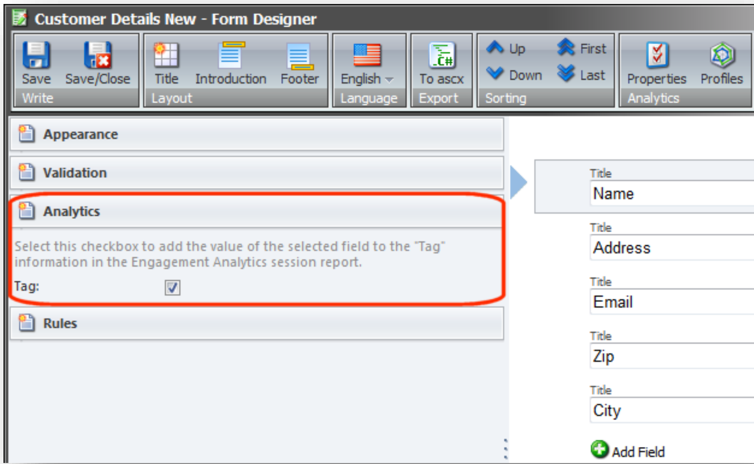
In DMS, you can tag individual fields on a form to track all the form data that a visitor adds during a visit. This includes partially completed fields and forms. You can view this information in the Engagement Analytics, Visit Detail (Session) report.

When you create a new form in Web Forms for Marketers, by default the Analytics tag check box is unchecked.

To enable Analytics form tagging:

1. In the Sitecore content tree select modules, Web Forms for Marketers, and then select a form. For example, *Customer Details*.
2. Open the Form Designer and select a suitable field, such as the **Name** field. In the left hand panel, open the **Analytics** group.

3. To activate Analytics tagging select the **Tag** check box.



4. In the Form designer ribbon, click **Save**.

When a visitor enters information in this field it will appear in the Engagement Analytics, Visit Detail (Session) report.