

EPiSERVER B2B ADAPT

Release 1.01



User's Guide

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EPiSERVER

User's Guide for EPiServer B2B Adapt

Created October 22, 2009

Updated November 10, 2009

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Introduction

What is EPiServer B2B Adapt?

EPiServer B2B Adapt is a personalization module that lets you serve targeted Web content to each visitor, based on their industry, geography or location. Using the Dun & Bradstreet database, EPiServer B2B Adapt matches the information shown with who is visiting your site. By identifying your visitors you can match their preferences with relevant content.

This User's Guide describes how to work with the EPiServer B2B Adapt functions in an integrated EPiServer CMS environment. For instructions on EPiServer CMS standard functionality please refer to the EPiServer CMS user documentation.

NOTE You need to install and configure the EPiServer B2B Adapt module in order to carry out the steps described in this guide. Please refer to the installation and configuration documentation for EPiServer B2B Adapt, which is available on world.episerver.com

Working with EPiServer B2B Adapt

Getting Started

When you have installed and configured EPiServer B2B Adapt, the module will be accessible from the EPiServer CMS Edit mode as a **B2B Adapt** tab in the left column. From this tab you will manage campaigns and rules.

Do the following to access EPiServer B2B Adapt:

1. Log in to EPiServer CMS and switch to **Edit** mode.
2. Select the **B2B Adapt** tab in the left column. Click the **Your campaigns** link in the left column to display an overview of campaigns that are running on your Web site. Click the **Add or modify campaign** link to manage campaign rules and content.
3. Campaigns that are running will be displayed under the **View** tab.
4. Select the **Settings** tab to select rules and map content for campaigns.

Managing Campaigns

Do the following to access the campaign management functions:

1. Select the **Settings** tab and then the **Campaign** tab.
2. You will see a list of created campaigns with descriptions, their creation time and time when they were last updated. From here you can create new campaigns, and edit and delete existing campaigns.

The screenshot displays the EPiServer CMS 5 B2BAdapt interface. At the top, it shows 'EPISERVER CMS 5' and 'You are logged in as: administrator'. The main content area is titled 'B2BAdapt' and includes a 'Campaign' tab. Below the tab, there is a 'Create' button and a table of campaigns. The table has columns for Campaign name, Description, Last updated, Created, Edit, and Delete. The campaigns listed are:

Campaign name	Description	Last updated	Created	Edit	Delete
EP demo	EP demo 2009				
Greetings to visitors	Send different greetings to different people visiting the same site.				
HanoiOffice	Hanoi Office	10/12/2009 9:00 AM			
London	Campaign X	10/13/2009 12:59 PM	10/13/2009 12:59 PM		
London 2009	Demo Campaign				

Creating a Campaign

Do the following to create a new campaign:

1. Select **Create** under the **Campaign** tab. The **Create new campaign** dialog box will be displayed.
2. Enter a campaign name in the **Campaign Name** field.
3. Enter a description in the **Description** field.

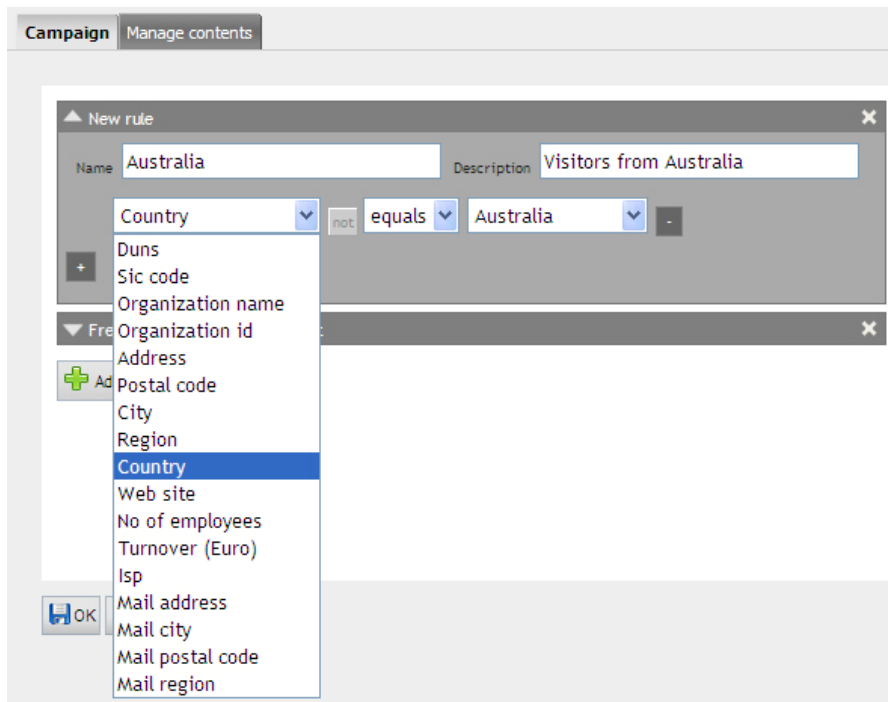
4. Select content in the **Default content** field. The default content is the content that will be displayed when no matching rule applies. The content type options you have depend on your implementation, but typically content is a banner or an article based on an EPiServer CMS page type. Content is created under the **Manage contents** tab.
5. Select **Save** or **Save and Continue**, to continue directly to the rule management.

The screenshot shows the 'B2BAdapt' interface with the 'Manage contents' tab selected. The main heading is 'Create new campaign'. Below this, there are three input fields: 'Campaign name' with the value 'Product X', 'Description' with the value 'Campaign for Product X', and 'Default content' with the value 'Default content'. At the bottom of the form, there are three buttons: 'Save', 'Save and Continue', and 'Cancel'.

Manage Rules for a Campaign

Do the following to set rules for a campaign:

1. Select **Edit** for the campaign you want to add rules to, and then select **Manage Rules**.
2. Select **Add rules...**
3. Enter a **Name** and **Description** for the rule.
4. Expand the drop-down area to set the criteria for the rule. The criteria will be based on the information available in the Dun & Bradstreet database, for instance country, company size and organization name and ID. These options are available in the drop-down list in the **New rule** section.



5. Select **Save** to save the rule.
6. Select **OK** to map the rule to the campaign.
7. The next step is to add content to the rule. Select the browse button for the rule to map content to the rule. Select an EPiServer CMS page in the page tree. The content type options you have depend on your implementation, but typically content is a banner or an article based on a specific EPiServer CMS page type. Content is created under the **Manage contents** tab.
8. Select **Save** to save the rule.

B2BAdapt
Manage campaign, rule and content

New values have been saved.

Campaign Manage contents

Edit campaign

Campaign name
Product X

Description
Campaign for Product X

Default content
Default content

Map rule with content

Rule	Content
Australia	Australia

Save Manage Rules Delete Cancel

Mapping Rules to Content

Do the following to map rule with content for a campaign:

1. In the campaign list, select the **Edit** icon for the campaign that you want to edit.
2. Here you can change the **Campaign Name**, **Description** and **Default content** page if needed.
3. Under the **Map rule with content** section you can change the content mapping for each rule by selecting the browse button. You can also create and add new rules, and delete existing rules from the campaign.
4. Click the **Browse** button to the right of the rule you want to edit, to select the matching content for the rule. For instance, you can have a *country based* campaign, meaning that you want to display the Australian content page for visitors from Australia. Note that the content pages must be created before you can map them with a rule for a campaign. Content is created under the **Manage contents** tab.
5. Select **Save** to save the changes to your campaign.

B2BAdapt
Manage campaign, rule and content

Campaign Manage contents

Edit campaign

Campaign name
Product X

Description
Campaign for Product X

Default content
Default content

Map rule with content

Rule	Content
Australia	Australia

Save Manage Rules Delete Cancel

Deleting a Campaign

Campaigns are deleted from the EPiServer B2B Adapt main view.

Do the following to delete a campaign:

1. Select the **B2B Adapt** page in the page tree structure, go to the **Settings** tab and select **Delete** for the campaign you want to delete.
2. Confirm the deletion by selecting **OK**.

Managing Content

Do the following to access the content management for a campaign:

1. Select the **Settings** tab and then the **Manage contents** tab.
2. A list of created content will be displayed. The list contains **Name**, **Content type** and **Saved date** for the content. From here you can also edit the content for a campaign, or delete content related to a campaign.



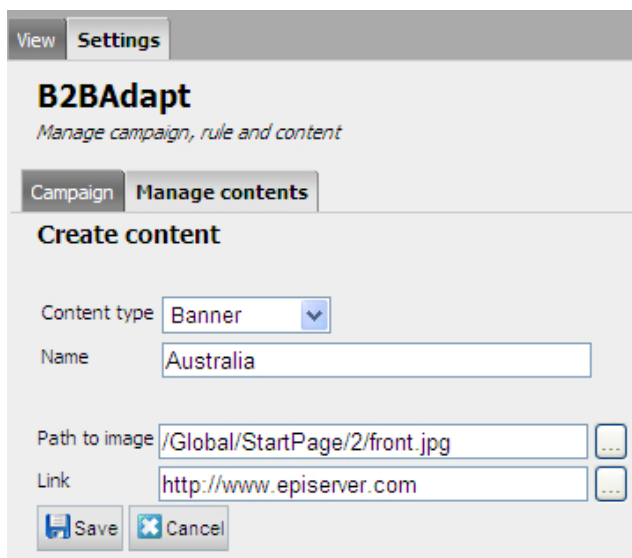
The screenshot shows the 'Manage contents' interface for a campaign named 'B2BAdapt'. It features a 'Create' button and a table with the following data:

Name	Content type	Saved date	Edit	Delete
Default content	Banner	9/22/2009 9:38 PM		
US	Article	9/23/2009 2:05 AM		
Xin chào	Article	9/22/2009 9:39 PM		

Creating Content

Do the following to create content for a campaign:

1. Select **Create** to create new content.
2. Select content type in the **Content type** list. Depending what you select, different options will be displayed. The content type options you have depend on your implementation, but typically content is a banner or content based on an EPiServer CMS page type. In this example the content is a banner image, and we will provide a **path** and a **link** to the image.
3. Enter a **Name** for the content.
4. Select **Save** to save your content.



The screenshot shows the 'Create content' form in the 'Manage contents' interface. The form includes the following fields and controls:

- Content type:** A dropdown menu with 'Banner' selected.
- Name:** A text input field containing 'Australia'.
- Path to image:** A text input field containing '/Global/StartPage/2/front.jpg' with a browse button (three dots).
- Link:** A text input field containing 'http://www.episerver.com' with a browse button (three dots).
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

Editing content

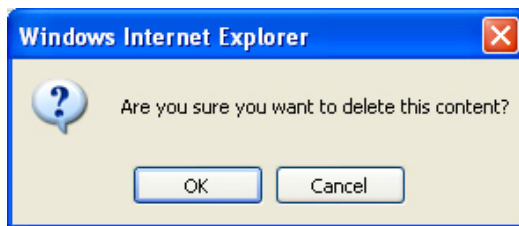
Do the following to edit content for a campaign:

1. In the content list under the **Manage Contents** tab, select **Edit** for the content you want to edit.
2. Change the information in the applicable fields.
3. Select **Save** to save your changes.

Deleting content

Do the following to delete content for a campaign:

1. In the content list under the **Manage Contents** tab, select **Delete** for the content you want to delete.
2. Select **OK** to delete the content.



Dynamic Content Area Preview

DCA – Dynamic Content Area, is a Web control on a page which allows you to change your content dynamically in a certain area of the page. For example, when a rule A is matched, content A will be displayed, and if a rule B is matched, content B will be displayed in the content area. Please refer to the EPiServer B2B Adapt Developer's Guide for more information on how to add dynamic content areas to an EPiServer CMS page.

The **DCA Preview** is a page template that gives you a possibility to view pages that are using DCA properties. The DCA Preview gives you an overview of your EPiServer B2B Adapt campaign pages as they will appear for different audiences set by your campaign rules. DCA Preview will be available as a tab on pages with DCA properties.

DCA Preview

Do the following to access the DCA Preview for a campaign:

1. In the EPiServer CMS Edit mode, select the EPiServer B2B Adapt page you want to preview.
2. Select the **DCA Preview** tab. This will display the campaign preview page.
3. In the **Select a Rule** list, chose the rule, for instance a country/domain, for which you want to see the preview. Depending on your rule selection the different content mapped to that rule will be displayed.

