# Personalization Tutorial – SoFy Environment

## Step 1 - Review Current Website Content

- 1. Open up the Ruby Storefront from the SoFy Solution Console link
- 2. Review the home hero image and recommend products currently displayed
- 3. Click on any recommended product
- 4. Add to cart > View full cart
- 5. Click on Ruby icon in top right of page
- 6. Notice that the home hero image and product recommendations are unchanged

### Step 2 - Create New Home Hero Content

- 1. Open Management Center from the SoFy Solution Console link
- 3. Navigate to the Marketing Tool
- 4. Verify store showing right side drop down is EmeraldSAS
- a. If not, select from drop-down menu
- 5. Select Content from left menu list
- 6. Select HomeHeroContent
  - a. Right Click > Copy
  - b. Right Click > Paste
- 7. Modify new content

### a. Name: HomeHeroContent-Bedroom

b. Text: <div class="MuiGrid-root MuiGrid-container marketing-content marketing-backgroundImage marketing-heroImage KitchenHeroContent"><img src="/EmeraldSAS/images/rooms/bedroom.jpg"><div class="MuiGridroot MuiGrid-item MuiGrid-grid-xs-10 MuiGrid-grid- md-6 MuiGridgrid-lg-5 marketing-text marketing-text-vertical- center"><h2 class="MuiTypography-root MuiTypography-h2 bottom- margin-

1"><b>Explore Your New Bedroom</b></h2><h5 class="MuiTypographyroot MuiTypography-h5 bottom-margin-2">Sleep in luxury with all new furniture, lighting, and decor that fit any bedroom style.</h5><a href="/bedroom"><button class="marketing-button primary" tabindex="0" type="text"><span class="MuiButtonlabel">Shop Bedroom</span><span class="MuiTouchRippleroot"></span></button></a></div>

c. URL: /bedroom

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8. Save > Close
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Step 3 - Create Home Hero Web Activity

- 1. Select Activities from left menu list
- 2. Right Click Activities and select New Web Activity > Content Recommendation > OK
- 3. Select Starting Point on workspace
  - a. Name: Home Hero Image
- 4. Select E-Marketing Spot on workspace
  - a. Enter "\*" in search box and click 'Find and Add"
  - b. From list on right, drag over "Home Hero" to the selection area

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- 5. Select Recommended Content on workspace
  - a. Enter "\*" in search box and click 'Find and Add"
  - b. From list on right, drag over "HomeHeroContent" to the selection area

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- 6. Drag Branch icon from tool panel to area between E-Marketing Spot and Recommended Content
- 7. Select Branch on workspace
  - a. Name: Home Hero Personalization
  - b. Paths: Bedroom, General

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- 8. Select Recommend Content from Bedroom Branch on workspace
  - a. Click on HomeHeroContent listed in the Content box and click the "X" next to the 'Find and Add" button to remove it
  - b. Enter "\*" in search box and click 'Find and Add"
  - c. From list on right, drag over "HomeHeroContent-Bedroom" to the selection area
- 9. Drag Cart icon from tool panel to the Bedroom branch right before the Recommended Content icon
- 10. Select Cart from Bedroom Branch on workspace
  - a. Shopping Cart Contents: Catalog Entries from Specific Categories
  - b. Target Customers: Who have catalog entries from any of the following categories and satisfy the following conditions
  - c. Categories
    - i. Enter "\*" in search box and click 'Find and Add"
    - ii. From list on right, drag over "Beds" and "Dressers" to the selection area
    - iii. Save



- 11. Edit > Click Activate Icon
- 12. Close

#### Step 5 - Modify Home Hero Web Activity

- 1. Select Activities from left menu list
- 2. Select "Home Recommended products"
- 3. Click Deactivate Icon
- 4. Double click on "Home recommended products" to open activity
- 5. Drag Branch icon from tool panel to area between E-Marketing Spot and Recommended Catalog Entry

#### 6. Select Branch on workspace

- a. Name: Home Hero Personalization
- b. Paths: Bedroom, General



- 7. Drag Cart icon from tool panel to the Bedroom branch right before the Recommended Catalog Entry icon
- 8. Select Cart from Bedroom Branch on workspace
  - a. Shopping Cart Contents: Catalog Entries from Specific Categories
  - b. Target Customers: Who have catalog entries from any of the following categories and satisfy the following conditions
  - c. Categories
    - i. Enter "\*" in search box and click 'Find and Add"
    - ii. From list on right, drag over "Beds" and "Dressers" to the selection area
- 9. Select Recommend Catalog Entry from Bedroom Branch on workspace
  - a. Right click > select all entries listed in the catalog entries box
  - b. Click the "X" next to the 'Find and Add" button to remove it
- 10. Add Bedroom products
- 11. Within the search box, enter and add the following products
  - a. BD-BEDS-0001
  - b. BD-BEDS-0004
  - c. BD-DRSS-0003
  - d. BD-DRSS-0002
  - e. BD-BEDS-0003
- 12. Save

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# Step 6 - Review Website Personalization

- Open up Ruby B2C Storefront from the browser tab or from the SoFy Solution Console link
- Review the current home hero image and recommended products
- Go to Bedroom > Dressers
- Select any item
- Add to cart > View full cart
- Return to Home Page and review changes to the Home Hero and Recommended Products