



Commerce Cloud Platform Adoption Playbook:

Source Codes

Provide a unique experience based on traffic source.



Source Codes Overview	2
Create a Source Code Group	4
Configure a Source Code URL	6
Trigger Experiences Using Source Codes	10
Trigger a Promotion with a Source Code	10
Trigger a Sorting Rule with a Source Code	12
Trigger Content with a Source Code	13
Trigger a Price Book with a Source Code	15
Test a Source Code Experience Using the Storefront Toolkit on Staging	16
Source Code Reporting	17
Additional Resources	18

Source Codes Overview

Definition and Usage

You can use the Commerce Cloud platform to configure URLs that trigger unique experiences such as promotions, specific content, a sorting rule, or a price book. This rule is activated by clicking on a URL with a source code, where a source code is an alphanumeric value appended to the end of the URL.

You can also create a vanity URL that directs customers to a special landing page, product detail page, category, or a specific URL.

Source codes are helpful when merchandising based on a traffic source, and can be used to leverage segmentation done for other marketing channels. A URL with a source code is typically placed on an affiliate website, within social media, an email or in a print catalog.

Using a source code in the URL also allows you to track transactional KPIs and measure the performance of the marketing channel.



Figure 1. Triggering Different Site Experiences with a Source Code

Source Codes vs. Coupons

Merchandisers can also use coupon codes to trigger promotions. The difference between a coupon code as a qualifier and a source code is that they are activated at different points in the purchase path.

Source codes are activated upon site entry at the beginning of the purchase path and are good for driving consistent site experiences from marketing channel to site arrival to checkout. They are also very useful when triggering product promotions in combination with content and sorting rules.

Coupons are entered at the end of the purchase path and therefore best suited to promotions, which are fulfilled at checkout like free shipping, a percentage or dollar discount off the order total.

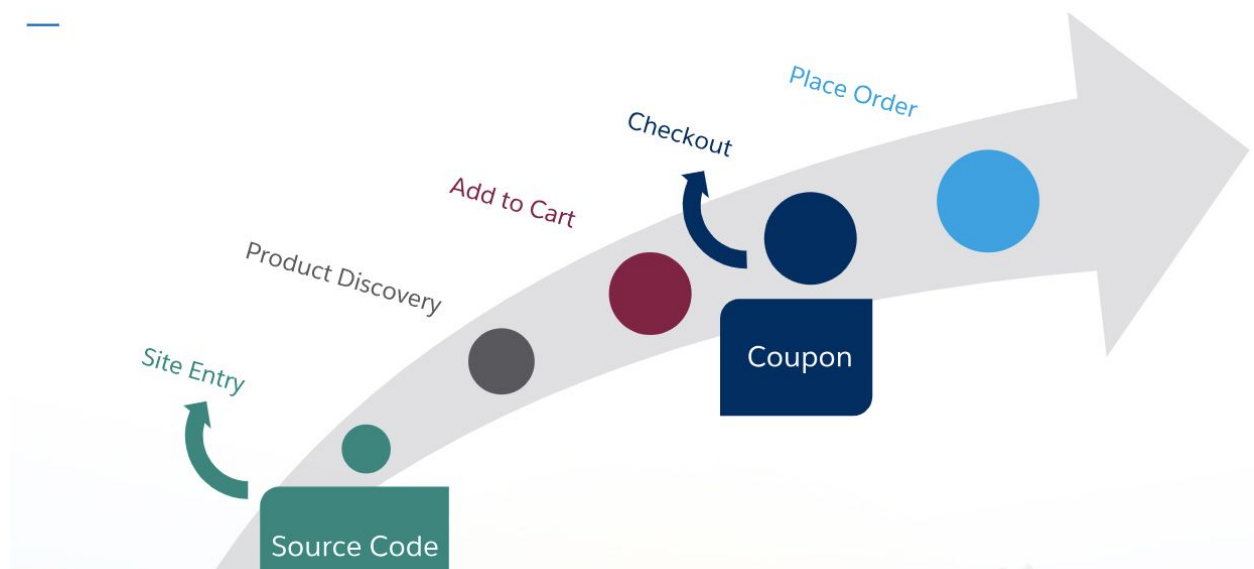


Figure 2. Customer Purchase Path with Source Code and Coupon Code

Create a Source Code Group

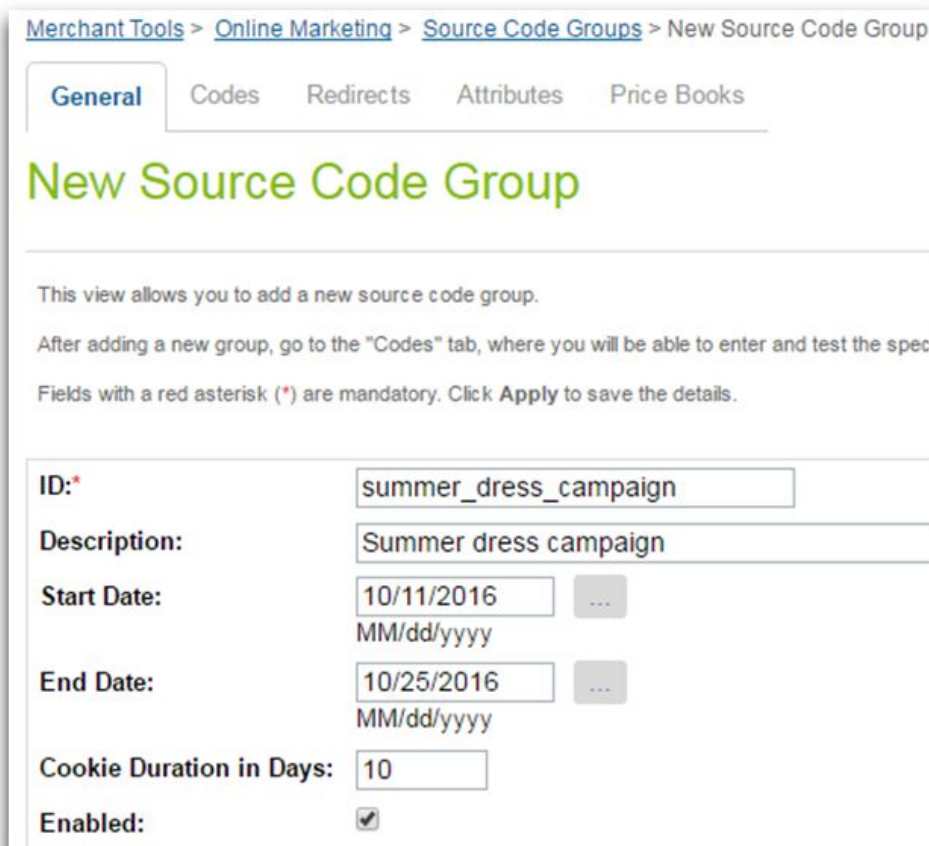
The first step is to create a source code group in Business Manager.

Merchant Tools > Online Marketing > Source Code Groups

Create a new source code group and then fill in the following information.

General Tab:

- Create an ID for your source code and add a brief description (optional).
- Select the start and end date when your source code should be valid.
- Select the duration of the cookie, which defines a period of time when the source code and corresponding experience is saved in a browser cookie. This setting overrides the sitewide cookie setting. A customer does not need to re-enter the site through the original source code URL once it has been activated and the cookie triggered.



Merchant Tools > Online Marketing > Source Code Groups > New Source Code Group

General Codes Redirects Attributes Price Books

New Source Code Group

This view allows you to add a new source code group.

After adding a new group, go to the "Codes" tab, where you will be able to enter and test the spec.

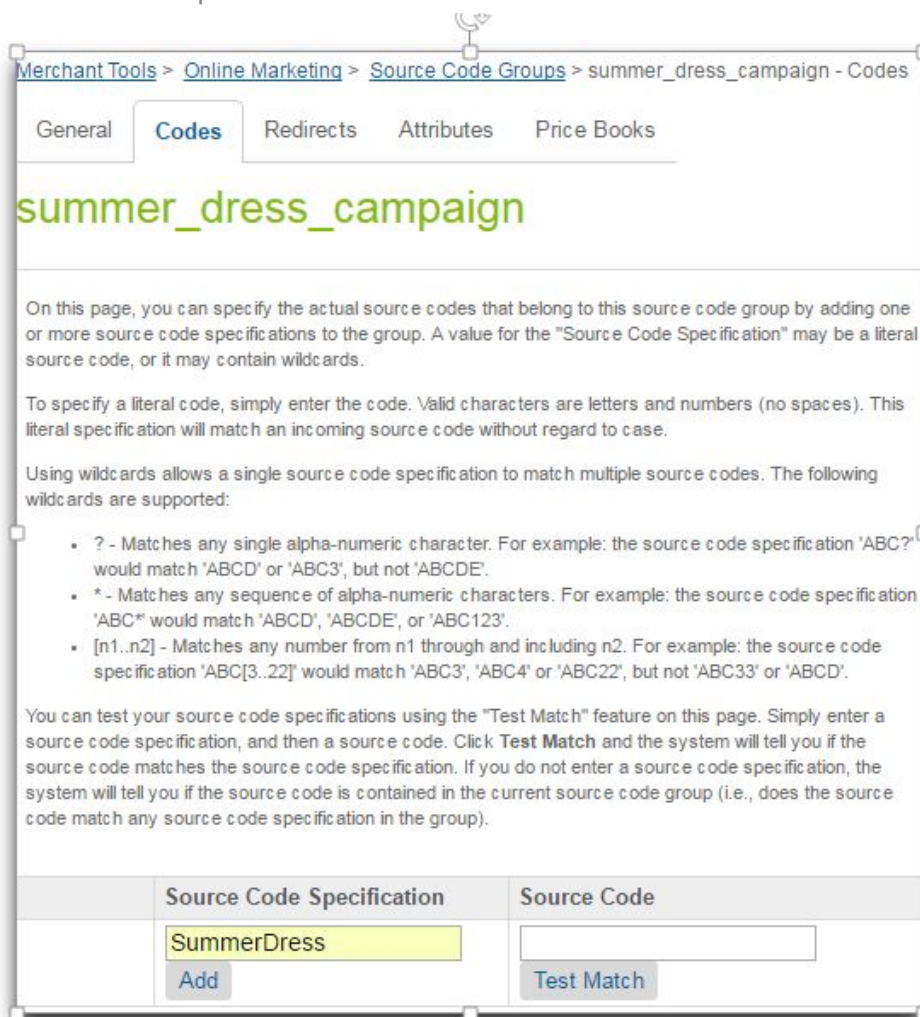
Fields with a red asterisk (*) are mandatory. Click **Apply** to save the details.

ID:*	<input type="text" value="summer_dress_campaign"/>
Description:	<input type="text" value="Summer dress campaign"/>
Start Date:	<input type="text" value="10/11/2016"/> <input type="button" value="..."/> MM/dd/yyyy
End Date:	<input type="text" value="10/25/2016"/> <input type="button" value="..."/> MM/dd/yyyy
Cookie Duration in Days:	<input type="text" value="10"/>
Enabled:	<input checked="" type="checkbox"/>

Codes Tab:

Here you will specify the actual source codes that belong to the source code group.

- Codes are alpha-numeric values without spaces.
- They are also case sensitive.
- You have the option to set a single source code or a range of source codes. A range of source codes is useful to have if you want to track performance on the individual code level.
- Source Code Specification: Enter a new source code specification and click Add to a new set of codes.
- Source Code: Enter a source code and click Test Match to test that the source code matches the source code specification.



Merchant Tools > Online Marketing > Source Code Groups > summer_dress_campaign - Codes

General **Codes** Redirects Attributes Price Books

summer_dress_campaign

On this page, you can specify the actual source codes that belong to this source code group by adding one or more source code specifications to the group. A value for the "Source Code Specification" may be a literal source code, or it may contain wildcards.

To specify a literal code, simply enter the code. Valid characters are letters and numbers (no spaces). This literal specification will match an incoming source code without regard to case.

Using wildcards allows a single source code specification to match multiple source codes. The following wildcards are supported:

- ? - Matches any single alpha-numeric character. For example: the source code specification 'ABC?' would match 'ABCD' or 'ABC3', but not 'ABCDE'.
- * - Matches any sequence of alpha-numeric characters. For example: the source code specification 'ABC*' would match 'ABCD', 'ABCDE', or 'ABC123'.
- [n1..n2] - Matches any number from n1 through and including n2. For example: the source code specification 'ABC[3..22]' would match 'ABC3', 'ABC4' or 'ABC22', but not 'ABC33' or 'ABCD'.

You can test your source code specifications using the "Test Match" feature on this page. Simply enter a source code specification, and then a source code. Click **Test Match** and the system will tell you if the source code matches the source code specification. If you do not enter a source code specification, the system will tell you if the source code is contained in the current source code group (i.e., does the source code match any source code specification in the group).

Source Code Specification	Source Code
<input type="text" value="SummerDress"/> <input type="button" value="Add"/>	<input type="text"/> <input type="button" value="Test Match"/>

Configure a Source Code URL

Before setting up a source code, you need to consider your scenario and identify what type of URL you need. Then, follow the relevant workflow option to set up the code and the URL.

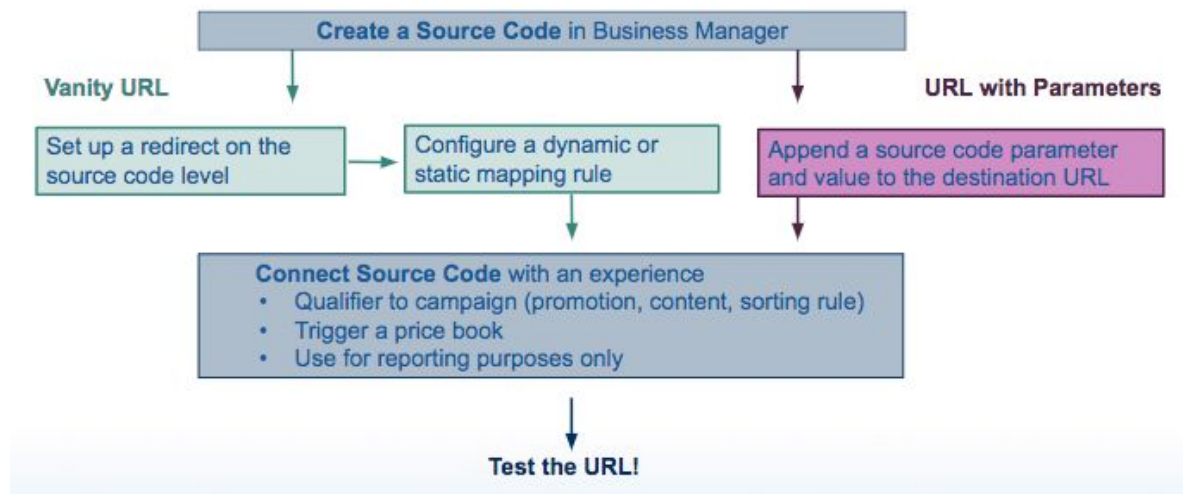


Figure 3. Source code setup workflow options

Configure a URL with a parameter exposed

Scenario: URL is going to be embedded in a clickable link, so you don't need a nice looking URL. Examples are URLs with source codes in emails, on affiliate websites, or social media.

To configure this type of URL add the source code parameter and value to an **absolute URL of the destination** you want the user to go.

URL format: **http://www.mysite.com/category/sub-category/?src=SourceCode**

Note: to test your URL on Staging, ensure you have aliases set up for your site under Merchant Tools > Online Marketing > SEO > Aliases. This is normally done during the implementation, and your Integration Partner should be able to do check it for you in case it was not done.



Configure a Vanity URL

Scenario: configure a clean and short URL for printed materials, or online marketing channels where you need people to easily remember and share it.

URL format: **www.mysite.com/vanity**

Configuring a vanity URL requires a few more steps than setting up a URL with a parameter.

To set up a redirect from a long URL to your short vanity URL, navigate to **Merchant Tools > Online Marketing > Source Code Groups > New-Redirects tab** and then configure the following.

Redirects Tab:

- Active: Where the customers should be taken when the code is active (i.e. homepage or hidden sales category)
- Inactive: Where the customers should be taken when the code is inactive (homepage or a particular page)

The screenshot shows the 'Merchant Tools > Online Marketing > Source Code Groups > new - Redirects' page. The 'Redirects' tab is selected. The page title is 'new'. Below the title, there is a description: 'On this page, you can specify the site behavior when a source code is supplied as a parameter on an incoming URL.' The form is divided into two sections: 'Active:' and 'Inactive:'. Each section has radio buttons for 'Default', 'Home Page', 'Product', 'Category', 'Page', and 'URL'. In the 'Active:' section, the 'Category' radio button is selected, and the 'Category' field contains the text 'newarrivals'. In the 'Inactive:' section, the 'Home Page' radio button is selected.



Next, **create a static or dynamic mapping**. The mapping rule calls the SourceCodeRedirect-Start pipeline which reads the redirect rules from the source code and delivers the user to the appropriate page and applies the source code. Both mappings are under **Merchant Tools > Online Marketing > SEO**.

Static mapping is usually used for a one-off redirect, on a one-to-one basis.

Static mapping pattern:

```
/new p,,,SourceCodeRedirect-Start,,src,SourceCode
```

where “new” is a vanity value and “SourceCode” is a source code value you have set up in the source code module.

[Merchant Tools](#) > [SEO](#) > Static Mappings

Static Mapping

This section contains static mappings to redirect unknown URLs to pipeline/controller URLs.

```
/mens p,,,Search-Show,,cgid,mens
/womens p,,,Search-Show,,cgid,womens
/kids p,,,Search-Show,,cgid,kids
/electronics p,,,Search-Show,,cgid,electronics
/giftcertificates p,,,GiftCert-Purchase
/sale p,,,Search-Show,,cgid,sale
/contactus p,,,CustomerService-ContactUs

**.jpg i s,,,,/images/imagenotfound.gif
**.jpeg i s,,,,/images/imagenotfound.gif
**.gif i s,,,,/images/imagenotfound.gif
**.png i s,,,,/images/imagenotfound.gif

/new p,,,SourceCodeRedirect-Start,,src,SummerDress
```



Dynamic mapping is used for creating a redirect pattern for a group of source codes, for example, an affiliate group.

Dynamic mapping pattern: `/affiliate/* p,,,SourceCodeRedirect-Start,,src,{0}`

[Merchant Tools](#) > [SEO](#) > Dynamic Mapping

Dynamic Mapping

This section contains pattern-based mapping rules to redirect unknown URLs to pipeline/controller URLs.

```
/affiliate/* p,,,SourceCodeRedirect-Start,,src,{0}
/email/* p,,,SourceCodeRedirect-Start,,src,{0}
/VIP/email/* p,,,SourceCodeRedirect-Start,,src,{0}
/wishlist/* p,,,Wishlist-ShowOther,,WishListID,{0}
/giftregistry/* p,,,GiftRegistryCustomer-Show,,ID,{0}

# catch-all rule
** p,,,Home-ErrorNotFound,,,
```

Note: make sure that the source code value does not match with any page on the site otherwise the rule will not be triggered. Example: for a vanity URL with “new” as a vanity value, make sure you don’t have this page on the site already: `www.mysite.com/new`

Trigger Experiences Using Source Codes

Trigger a Promotion with a Source Code

In order to trigger a promotion, the source code has to be added to a campaign as a qualifier. That campaign must also have a promotion assigned to it. Please see the [Campaigns Playbook](#) for more information.

Navigate to **Merchant Tools > Online Marketing > Campaigns** to create a campaign.

Fill in the campaign ID, description and dates. Be sure to enable the campaign and assign a qualifier, in this case, the source code.

[Merchant Tools](#) > [Online Marketing](#) > [Campaigns](#) > dresses 20%

dresses 20%

Copy Delete

General

ID: * dresses 20%

Enabled: * Yes

Description: Summer dress campaign 20% off

Scheduling & Qualifiers

Start Date: 04/10/2018 12:00 AM No Start Date

End Date: 04/29/2018 11:45 PM No End Date

Customer Groups: (0) [Edit](#)

Source Codes: (1) summer_dress_campaign [Edit](#)

Coupons: (0) [Edit](#)



You also need to assign your promotion to the campaign.

Experiences

[+ Add Experience](#)

Slot Configurations (0 Experiences)			
ID	Slot	Context	Schedule

Promotions (1 Experience)			
ID	Schedule	Customer G...	Source Codes
dresses 20%	04/10/2018 12:00 A...		summer_dress_campaign

Sorting Rules (0 Experiences)			
Keyword Search Sorting Rules (0 Experiences)			

The last step is to configure the URL you will provide customers in your marketing (email, social, SEM) with the source code and test it to be sure it triggers your promotion. Be sure to do this in Staging before you replicate to Production.

Add the source code parameter and value to the end of the absolute URL of the destination you want the user to go. Out of the box the source code parameter is “src” and you need to add a question mark “?” before it and “=” after, then add the code value you’ve set up in Business Manager.

Destination URL Example:

women's dress category page with source code parameter and value appended

<http://ikyselova-inside-eu01-dw.demandware.net/s/SiteGenesis/womens/clothing/dresses/?src=SummerDress>

Source code parameter: [?src=](#)

Source code value: [SummerDress](#)

Note: to test your URL on Staging, ensure you have aliases set up for your site under Merchant Tools > Online Marketing > SEO > Aliases. This is normally done during the implementation, and your Integration Partner should be able to do check it for you in case it was not done.



Trigger a Sorting Rule with a Source Code

A product sorting rule can be triggered with a source code for example if you are running a summer dress sale, and want to push summer floral dresses to the top of the dress category so customers see those options first when they arrive on the site.

After you create your sorting rule, add the sorting rule to the campaign experiences and be sure the source code is the campaign qualifier and test!

Merchant Tools > Online Marketing > Campaigns > dresses 20%

dresses 20%

Copy Delete

Start Date: No Start Date

End Date: No End Date

Customer Groups: (0) [Edit](#)

Source Codes: (1) summer_dress_campaign [Edit](#)

Coupons: (0) [Edit](#)

Experiences

[+ Add Experience](#)

Slot Configurations (0 Experiences)

ID	Slot	Context	Schedule
----	------	---------	----------

Promotions (1 Experience)

ID	Schedule	Customer Groups	Source Codes
dresses 20%	Continuously		summer_dress_campaign

Sorting Rules (1 Experience)

ID	Description	Categories
Category Position + SPC +SR		womens-clothing-dresses



Trigger Content with a Source Code

A customer group is required if triggering content using a source code. The customer group must be added as the campaign qualifier instead of the source code (customer group membership rule “Active source code group = Your source code ID”).

Create the Dynamic Customer Group in **Merchant Tools > Customers > Customer Groups**.

The screenshot shows the 'Edit Customer Group' interface for 'Summer_dress_campaign'. The 'General' tab is active, displaying the following details:

ID*	Type*
Summer_dress_campaign	Dynamic

Below the details is a 'Members' section with a modal window for configuring conditions. The modal has two buttons: 'Add Include' and 'Add Exclude'. It shows 'Include Condition Group 1' with a 'Match' dropdown set to 'All Conditions'. The condition is defined as follows:

Attribute	Operator	Value
Active Source Code Group (session.sourceCodeGroup)	is equal	summer_dress_campaign

An 'Add' button is located at the bottom left of the modal.



Once your customer group is created, add the customer group as the qualifier to your campaign. You don't need to add a source code as a qualifier.

Then add the content slot configuration as an experience in your campaign and test!

Merchant Tools > Online Marketing > Campaigns > dresses 20%

dresses 20%

Copy Delete

General

ID: * dresses 20%

Enabled: * Yes

Description:

Scheduling & Qualifiers

Start Date: No Start Date

End Date: No End Date

Customer Groups: (1) Summer_dress_campaign [Edit](#)

Source Codes: (0) [Edit](#)

Coupons: (0) [Edit](#)

Experiences

[Add Experience](#)

Slot Configurations (1 Experience)			
ID	Slot	Context	Schedule
womens-clothing-dresses VIP	cat-banner	womens-clothing-dresse...	Continuously

Promotions (1 Experience)		
ID	Schedule	Customer Groups
dresses 20%	Continuously	Summer_dress_campaign



Trigger a Price Book with a Source Code

You can use source codes to trigger a price book. You may want to do this if you have a specific VIP price book, or sales price book and want to show special pricing only to customers who have clicked a source code URL. If you are only triggering a price book and no other experiences, you don't need a campaign.

Navigate to the source code you created in **Merchant Tools > Online Marketing > Source Code Groups** and go to the **price book tab**. Select the price book you want to activate with the source code.

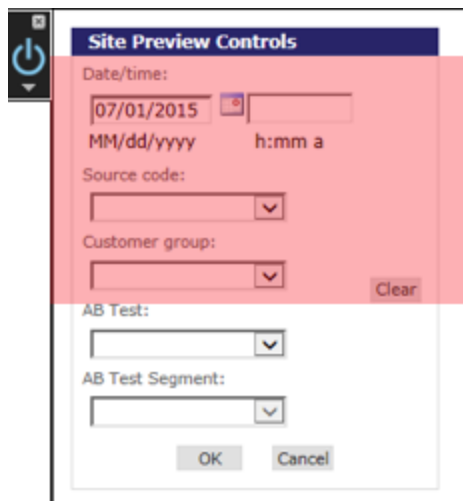
The screenshot shows the Salesforce Merchant Tools interface. At the top, there is a breadcrumb trail: [Merchant Tools](#) > [Online Marketing](#) > [Source Code Groups](#) > VIPSale - Price Books. Below this, there are several tabs: **General**, **Codes**, **Redirects**, **Attributes**, and **Price Books** (which is selected). The main heading is **VIPSale**. Below the heading, there is a horizontal line and a paragraph of text: "This page shows the price books assigned to this source code group. The price lookup considers those". Below this text is a section titled "Assign Price Book". It contains a text input field labeled "Price Book ID:*" with the value "vip_prices" entered. To the right of the input field are three small grey buttons: an ellipsis "...", a plus sign "+", and an "Add" button. Below the "Assign Price Book" section, there is a message: "There are no price books assigned to this source code group."

Note: in order to trigger a price book with a source code, you have to make sure that the price book is un-assigned from the site. If your price book with lower prices is assigned to the site, everyone will see it, as the lower price on the platform always overrides a higher one. The price book must also be activated.

Test a Source Code Experience Using the Storefront Toolkit on Staging

Within your Staging environment, click on the Storefront.

- From the Storefront Toolkit, select Site Preview.
- Enter a date within the source code timeframe.
- Select the source code or customer group from the campaign you want to test.



The screenshot shows a dialog box titled "Site Preview Controls". It contains the following fields and controls:

- Date/time:** A date input field showing "07/01/2015" with a calendar icon to its right. Below it, the format "MM/dd/yyyy h:mm a" is displayed.
- Source code:** A dropdown menu.
- Customer group:** A dropdown menu with a "Clear" button to its right.
- AB Test:** A dropdown menu.
- AB Test Segment:** A dropdown menu.
- At the bottom, there are "OK" and "Cancel" buttons.



Source Code Reporting

You can use source codes to track the performance of a particular channel or a URL. The source code conversion report associates source codes in a session with orders placed during the session. The visits are classified into four groups:

- All Visits
- With Source Codes
- Without Source Codes
- With Inactive Source Codes
- With Invalid Source Codes

This report can help you tune your source code placements, find outdated source codes, and discover the most popular source codes.

The Source Code Conversion report is found in Business Manager in **Merchant Tools > Analytics > Conversion Reports > Source Code Conversions**.

Description	All Visits	With Source Codes	Without Source Codes	With Inactive Source Codes	With Invalid Source Codes
Visits	485,913 (100.00%)	1,734 (0.36%)	484,167 (99.64%)	0 (0.00%)	12 (0.00%)
Order Conversion	2.13%	21.63%	2.06%	0.00%	0.00%
Total Orders	10,676 (100.00%)	380 (3.56%)	10,296 (96.44%)	0 (0.00%)	0 (0.00%)
Average Merchandise Total per Order	73.32 USD	91.86 USD	72.64 USD	0.00	0.00
Average Merchandise Total per Visit	1.61 USD	20.13 USD	1.54 USD	0.00	0.00
Average Items per Order	2.44	2.98	2.42	0.00	0.00
Average Visit Duration (h:m:s)	00:03:58	00:14:22	00:03:56	00:00:00	00:11:56

Conversion of Source Codes									
This reports shows the conversion of source codes into orders. It lists all source code used within the reported time period.									
Source Code	Group	Count	Total Orders	Merchandise Total	Average Merchandise Total per Usage	Average Merchandise Total per Order	Items per Order	Order Conversion	
BDCW4TU7KY3ISA	WCBDAY15_1SPctOrd_BirthdayEm	2	0	0.00	0.00	0.00	0.00	0.00%	
BQKWFLFS	CSCXLAPP_30PctOrd_HolidayCan	111	32	2,894.08 USD	26.07 USD	90.44 USD	3.72	28.83%	



Additional Resources

On-Demand Videos

Listen to and watch [Platform Adoption Webinars](#).

Ask the Community

Get answers to your questions from Commerce Cloud experts, partners, and other customers via the [Ask the Community](#) forum on XChange. Commerce Cloud XChange login required.

1-on-1 Help

Request a [Commerce Cloud Accelerator](#).

Upcoming Events & Webinars

Review the [calendar](#) of upcoming Commerce Cloud learning opportunities.