

Woodburn Stores Demo Lab

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Creating a new generation of experts

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Introduction

This hands-on lab guides you through the Woodburn Stores in the HCL Digital Experience Solution Modules which allows you to learn many of the capabilities of HCL Digital Experience (DX). It allows you to discover a fictitious retail company, called Woodburn Stores, with two different clients who both have a personalized experience and a content curator that may easily update the site with no support from IT.

This lab will enable you to discover other HCL Customer Experience portfolio solutions, enabling you to sell more using HCL Commerce, make online customer behaviors actionable with HCL Discover and take omni-channel marketing decisions using HCL Unica.

These integrated solutions may not be configured in your instance and are not included with the HCL Digital Experience license. Contact your HCL person to learn more on this.

In this lab, you will play the roles of three users for the fictitious Woodburn Commerce company.



John Smith, new customer, based in New Jersey (USA)

As John, a future customer of Woodburn Stores, you will discover how the Woodburn Stores site allows you to easily find the right clothing for you, sign up to get the latest news and offers and finally registers as a new customer.



Mandy Zhang, loyalty customer, based in Boston (USA)

As Mandy, a loyalty customer of Woodburn Stores, you will discover how the site adapts to your loyalty. You will try to make a new purchase and provide feedback on further improving the site.



Rose Bozli, Woodburn Stores Marketing Manager based out of Tokyo, Japan

And finally, as Rose, the marketing manager of Woodburn Stores, who is authorized to see others content to ensure the site is optimized for each member. You will receive the feedback from Mandy and first check what Mandy was seeing. Then you will work on the feedback and correct the site, add a page configured with dedicated products and engaging content.

Prerequisites

1. Access to a sandbox in HCL SoFy with the HCL Digital Experience Solution Modules deployed.
2. Access to download the Lab Resources. In the same place where you have found this lab, you will find corresponding resources which you may download and unzip in your Desktop. This helps you to run the lab more easily, and you may later replace them by your own ones.

You will be using the following user IDs and passwords:

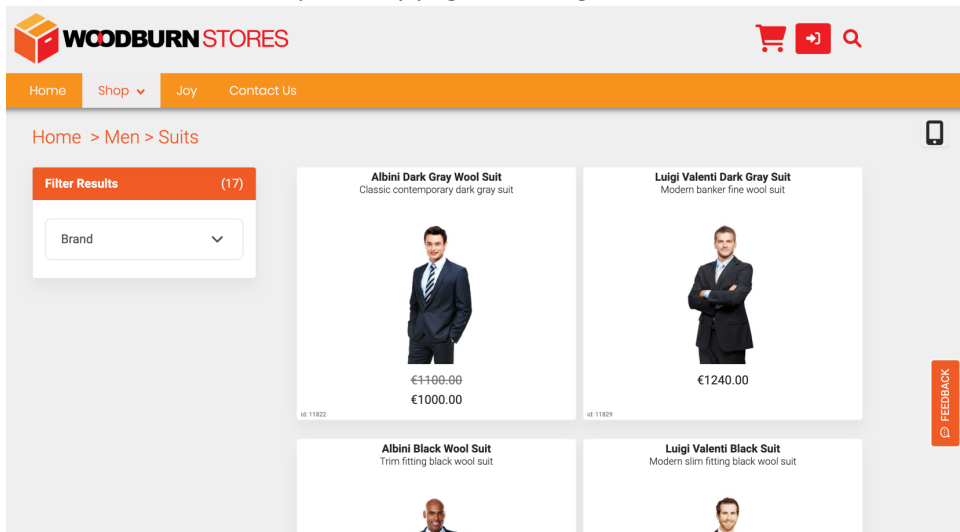
Purpose	User	Password
SoFy Login	Your official email id	Your password
SoFy Solution Console Login	sol-admin	<from solution console>
Member John Smith (or yourself)	jsmith	HCL-Dem0
Member Mandy Zhang	mzhang	HCL-Dem0
Practitioner Rose Bozli	rbozli	HCL-Dem0

Lab Overview

In this lab, there are different parts that help you discover and manage the digital stores of Woodburn Stores, with HCL Digital Experience. These are shortly introduced now.

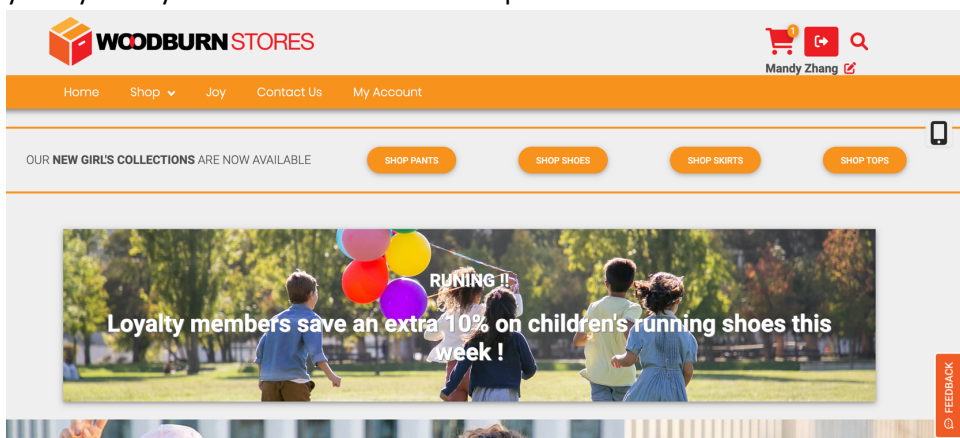
Part 1: John discovers the new Woodburn Stores site

As John, a new customer of Woodburn Stores, you will discover how the Woodburn Stores site allows you to interact easily, with great content, as an anonymous visitor. You will sign up for a Newsletter, visit the Shop and Joy pages, and register as a new customer.



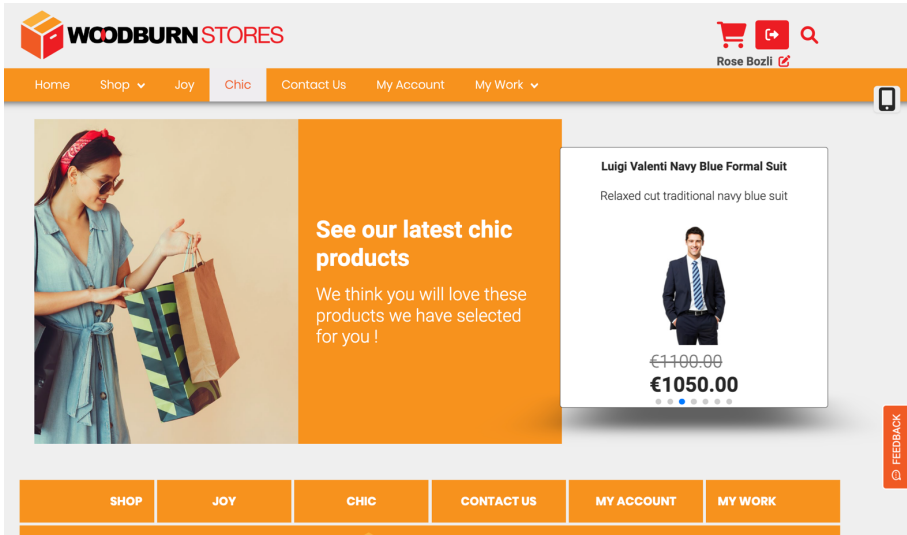
Part 2: Mandy visits Woodburn Stores as a loyalty customer

Then, you will experience Woodburn Stores as Mandy. Mandy is a loyalty customer. She is specially interested in chic clothing. You will log in and experience how the site adapts to your status. Then you try to buy a chic dress and find and report an issue.

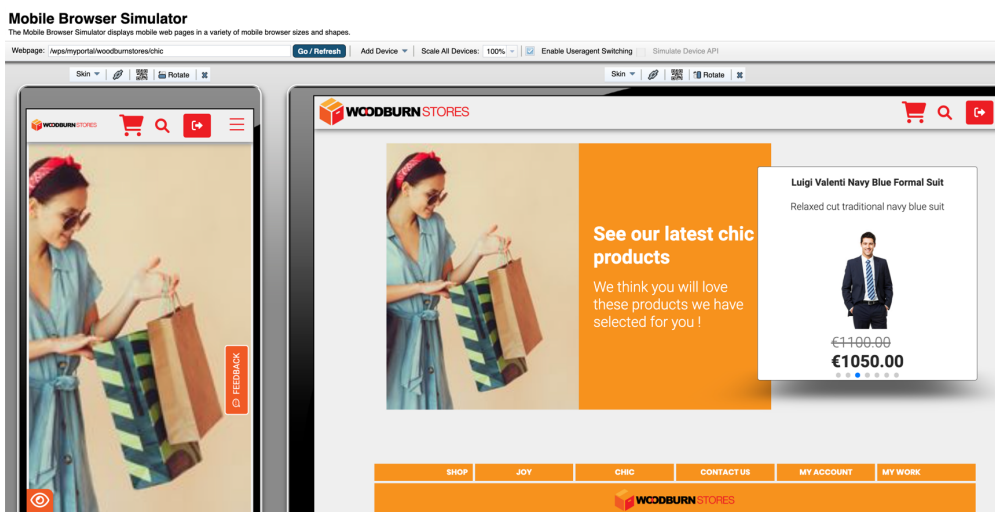


Part 3: Rose updates the site

And finally, as Rose, the marketing manager of Woodburn Stores, who is authorized to see others content to ensure the site is optimized for each member. You will work on the feedback from Mandy and first check what Mandy was seeing. Then you will work on the feedback and correct the site, add a new chic page configured with chic products and men suits that would only show to men. And you will test if this all works well on all devices. Here is the desktop version.



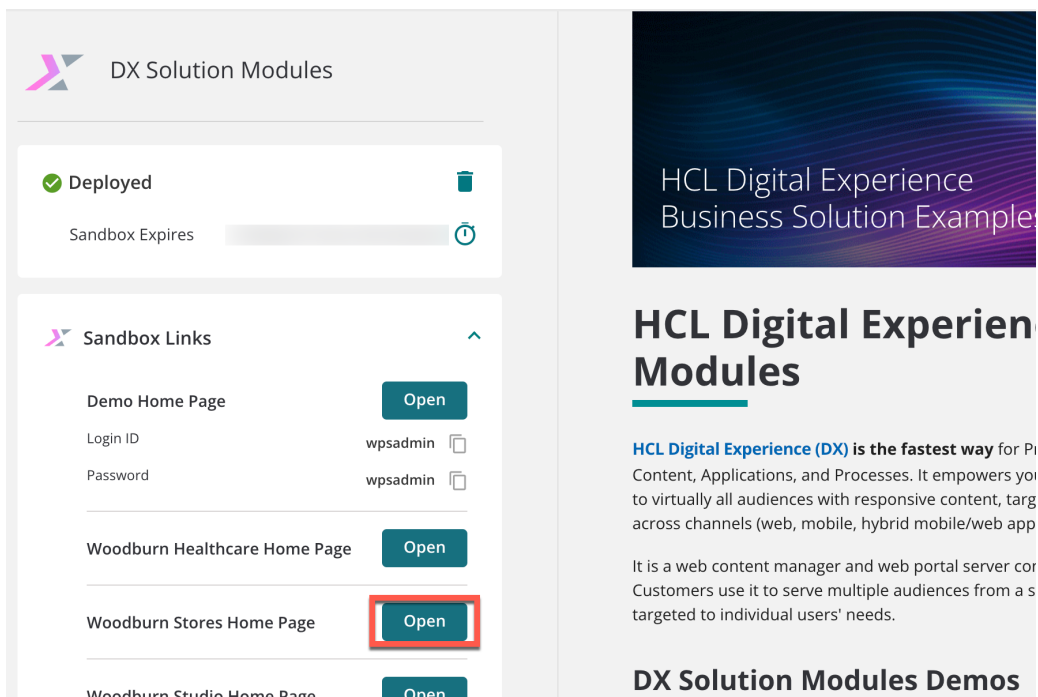
And the corresponding mobile view.



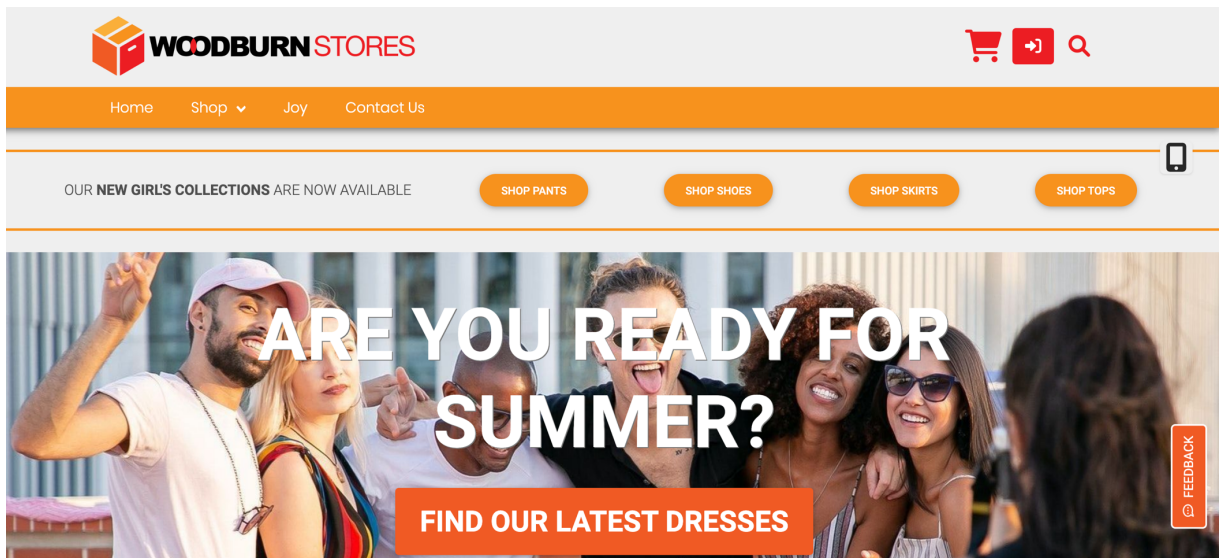
Part 1: John discovers the new Woodburn Stores site and registers

As John, a new customer of Woodburn Stores, you will discover how the Woodburn Stores site allows you to interact easily, with great content, as an anonymous visitor. You will sign up for a Newsletter, visit the Shop and Joy pages, and register as a new customer.

1. Go to the home page of Woodburn Stores first. On the server where the DX Solution Modules has been installed, next to **Woodburn Stores Home Page**, click **Open**. Simulator, to access your instance of the DX Solution Modules.



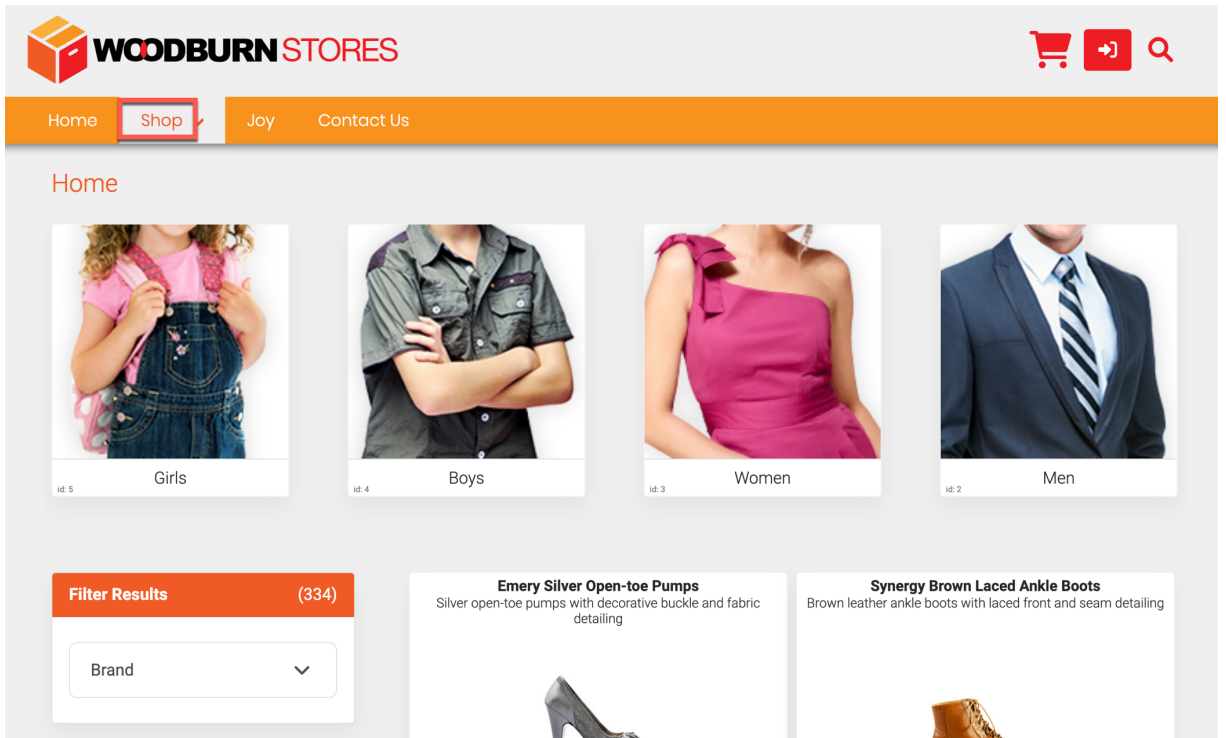
2. This brings you to the Home Page of Woodburn Stores. You may use **CTRL +** and **CTRL -** to zoom in and out.



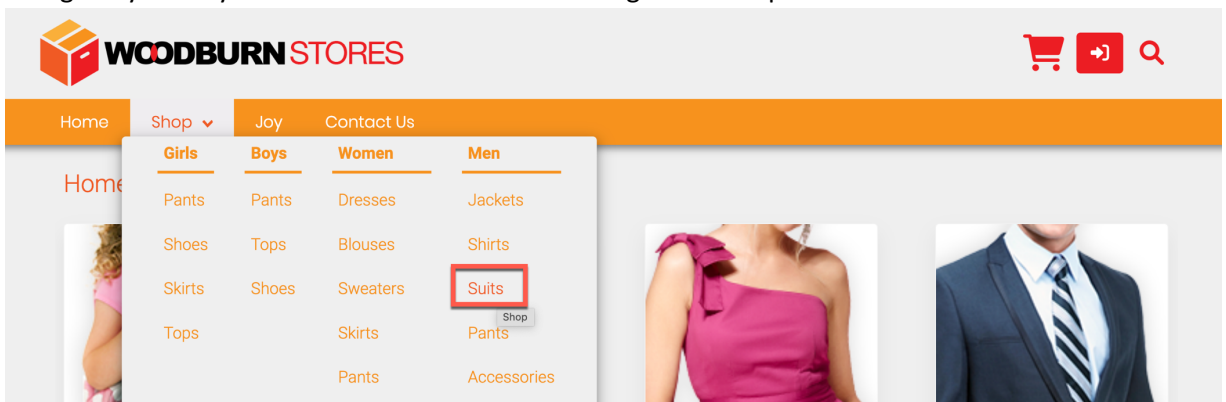
- Now have a look around at this home page. You will see several “New girl’s collections” promoted, and option to win a handbag, option to find out latest dresses, free shipping promotion, an easy way to shop for the latest girl’s shoes, show girls, boys, women and men, and an option to get their latest news & offers. Sign up for this. Enter your name, email address, check you have read and agreed to the terms and conditions, indicate you are not a robot and then click **SUBSCRIBE**. You may use John Smith’s example, or your own details.

- You will get a confirmation that you have successfully signed up. This may trigger kick off a new customer journey that starts by sending an email to sign up for an account. Note that no email system is set up in this environment, so do not expect to receive an email confirmation. Then start shopping for men clothing and click **SHOP FOR MEN**.

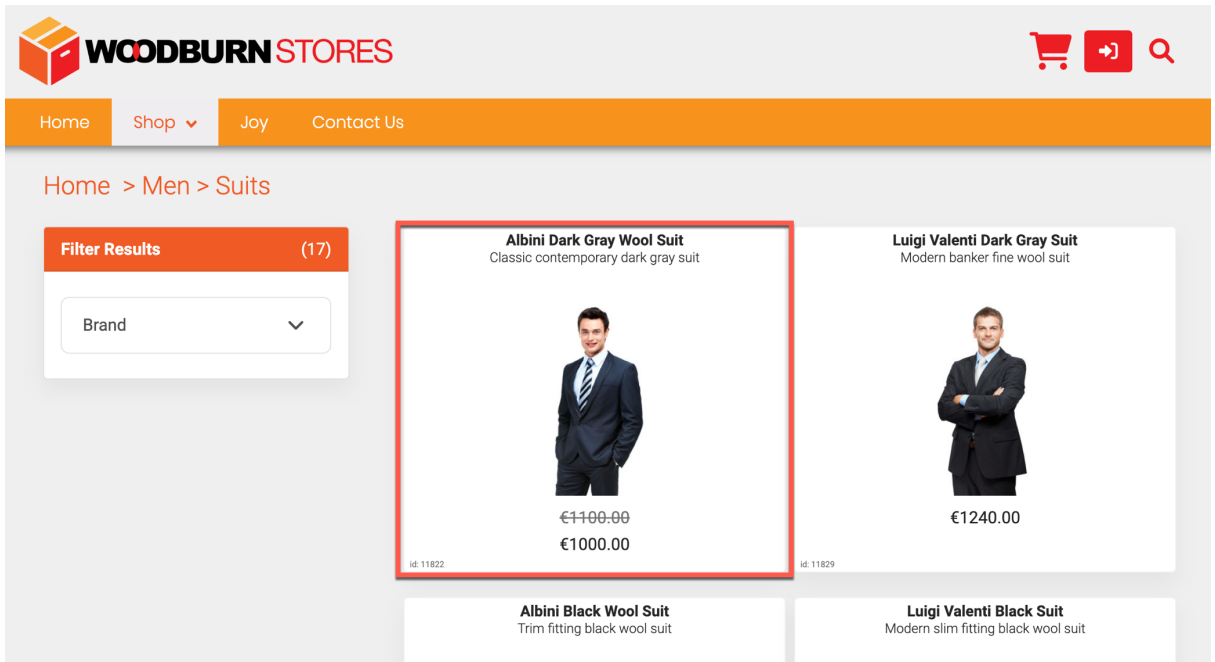
- This brings you to the Shop page with all men clothing. On the top, you will see different categories, like Shirts, Suits, Pants, etc. and below all the clothing. Click on **SHOP**.



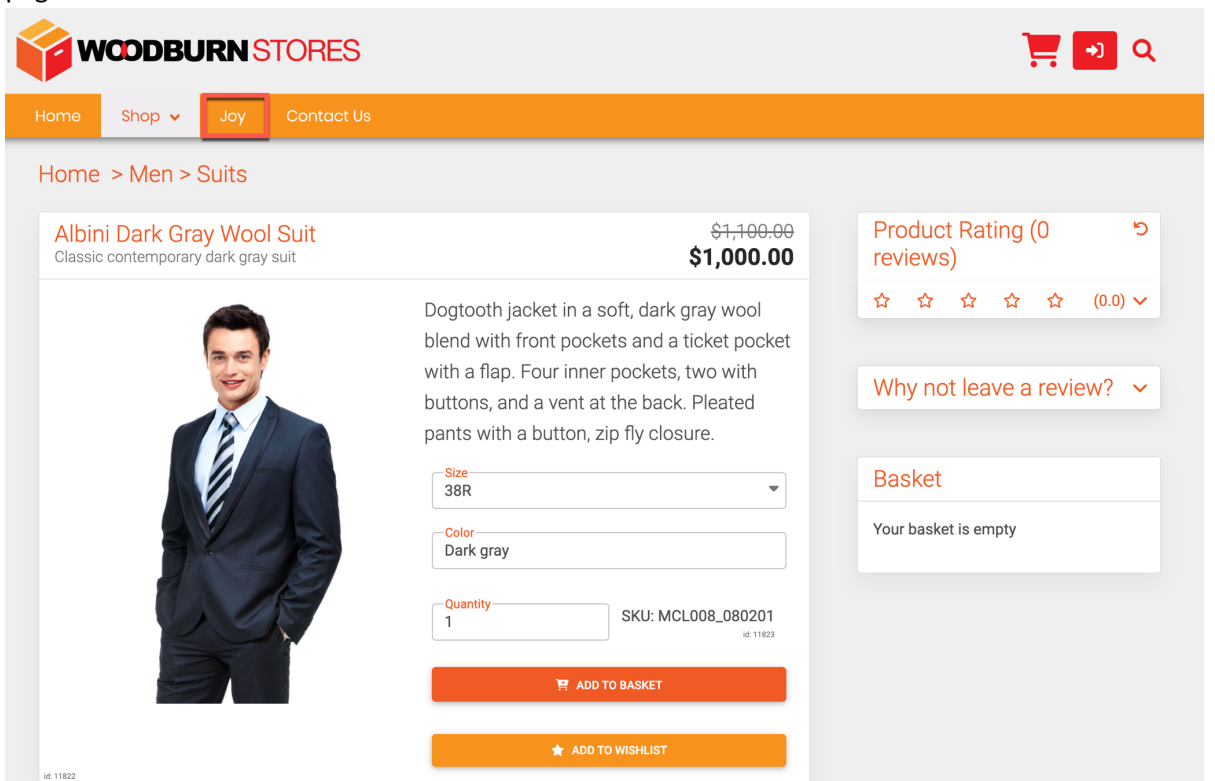
- This gives you easy access to all the different clothing in this shop. Click **Suits**.



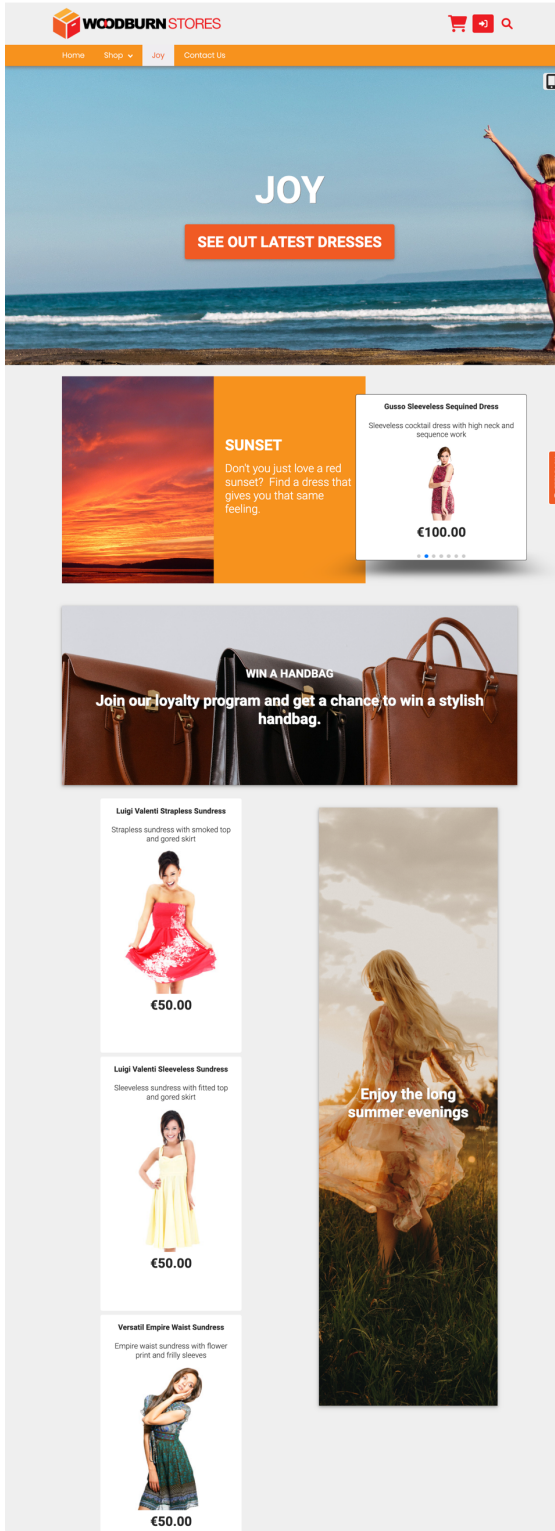
- And now you can see all the men suits. Have a closer look at one of them. Click **Albini Dark Gray Wool Suit**.



- Notice you have different options for size, color, quantity and may add this to your basket and wish list. For now, continue discovering the site and check out what's behind this Joy page. Click **JOY**.



- 9. So, this is all about dresses. You can see the latest dresses, some related to sunset, win a handbag again, there is an “Enjoy the long summer evenings” image that shows on the right and on its left a list of dresses going from most expensive to cheapest. Some of this will look different, if you connect with a person that has a different profile (e.g. loyal customer, as you will see in the next part).



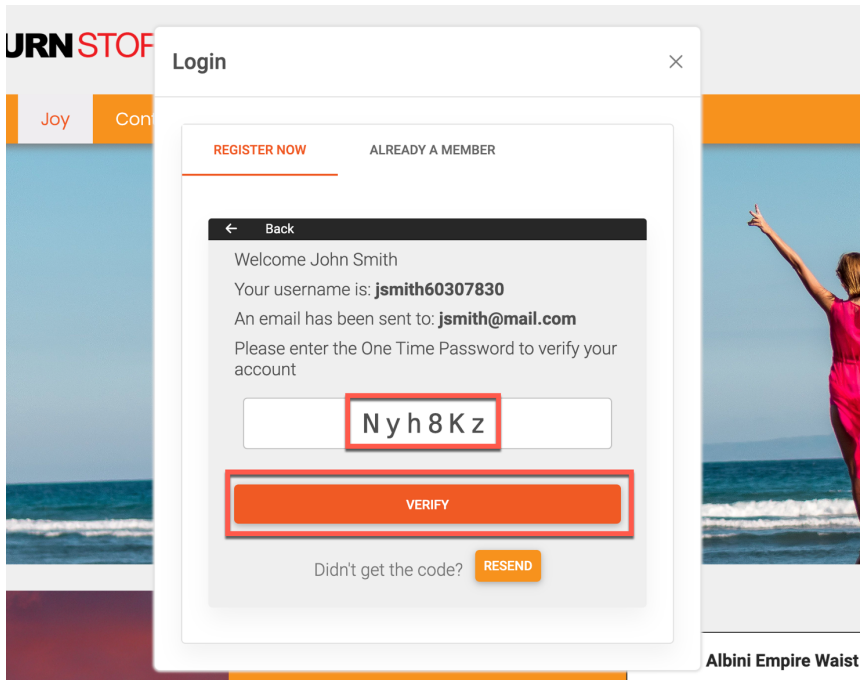
- Finally register to create an account. Click the log in icon. Then click **REGISTER** and complete your email, password, first and last name and click **REGISTER**.

The screenshot shows a web browser window with the JRN STORES logo in the top left. A 'Login' modal is open, featuring a 'REGISTER NOW' button (highlighted in red) and a link for 'ALREADY A MEMBER'. The registration form contains the following fields: First Name (John), Last Name (Smith), Email (jsmith@mail.com), Telephone Number (+1234567890), Password (*****), and Confirm Password (*****). A red 'REGISTER' button is at the bottom of the form. In the background, a woman in a pink dress is shown against a beach scene. A product card for 'Hermitage Fit and Flare Dress' is visible on the right, with a description: 'Jewel-toned cocktail dress with fitted bodice and gently flared skirt'.

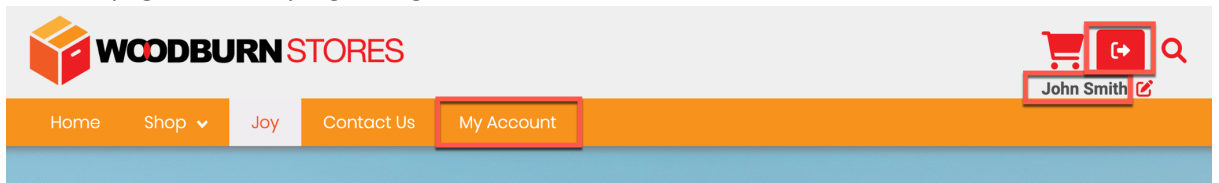
- As there is no mail system configured, instead, you get the simulated e-mail notification showing the One Time Password (OTP) you will need to verify, which here is "Onogda". Note or copy this. Then click **OK**.

The screenshot shows a simulated e-mail notification dialog box. The text inside reads: 'g... .com says Simulated e-mail, OTP is Onogda'. The OTP 'Onogda' is highlighted in a red box. An 'OK' button is highlighted in a blue box at the bottom right.

12. Note your new username. Now enter this One Time Password to verify your account and click **VERIFY**.



13. And you are now logged in with your new account. Notice you have an additional My Account page and finally log out again.

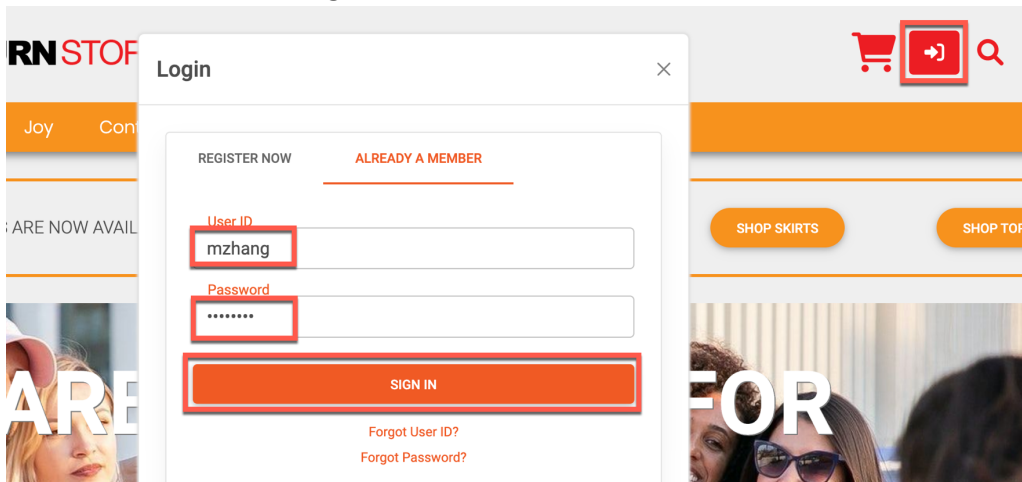


You have successfully discovered the Woodburn Stores site and created your account.

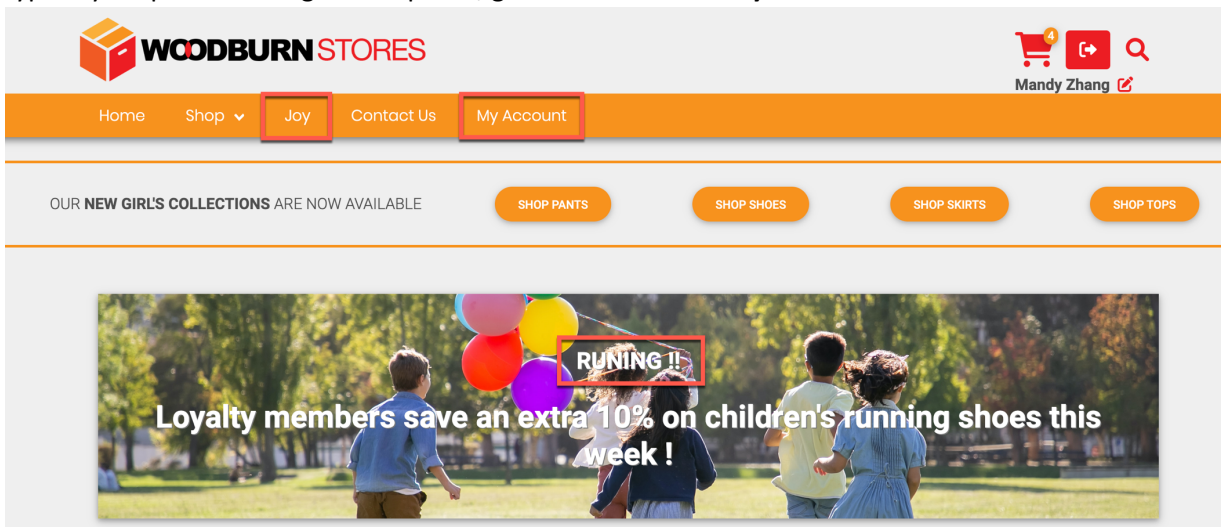
Part 2: Mandy visits Woodburn Stores as a loyalty customer

Then, you will experience Woodburn Stores as Mandy. Mandy is a loyalty customer. She is specially interested in chic clothing. You will log in and experience how the site adapts to your status. Then you try to buy a chic dress and find and report an issue.

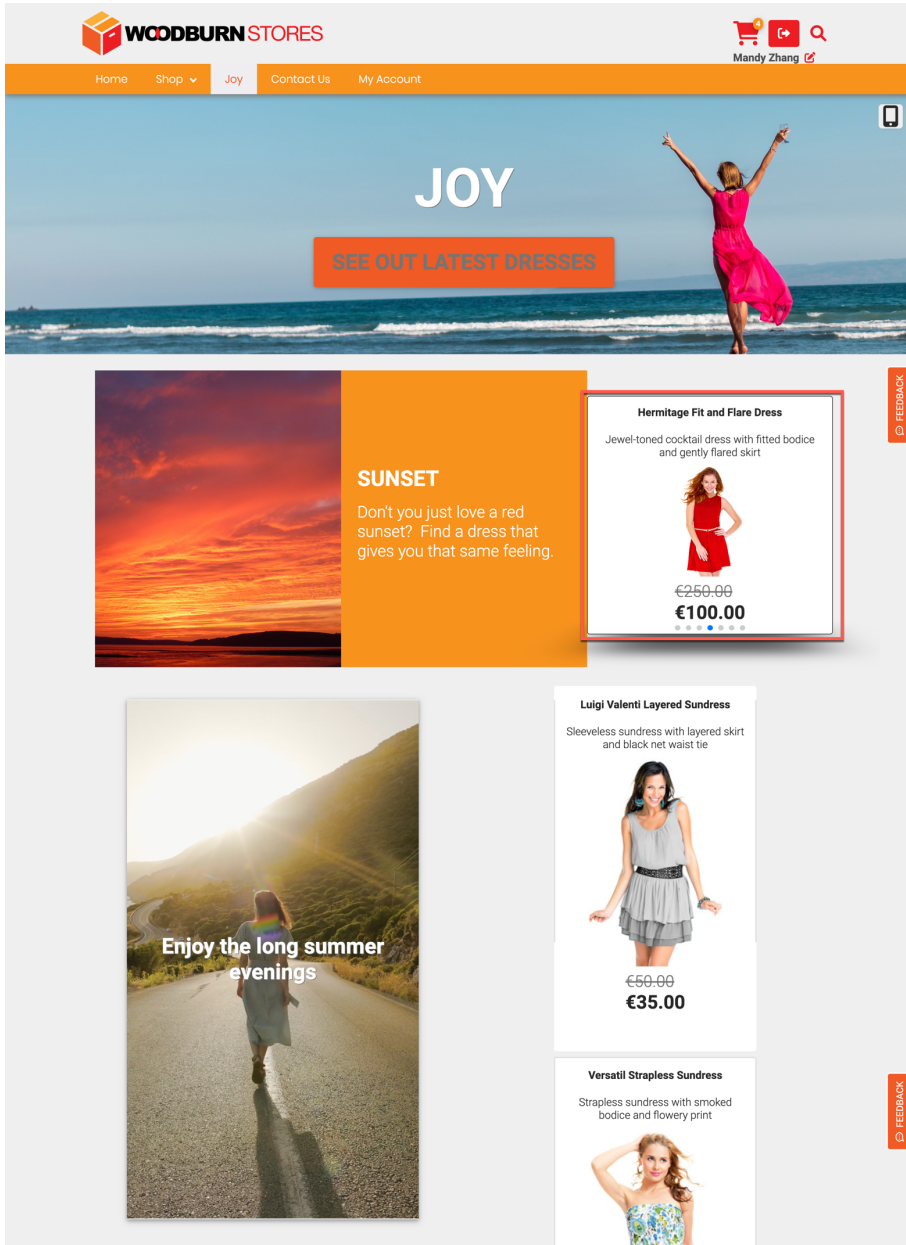
1. Now log in as Mandy to get a more personalized experience. Click the log in icon and enter your credentials: User ID **mzhang** and Password **HCL-Demo0**. Then click **SIGN IN**.



2. As you are a loyal customer, Woodburn Stores has learned from your navigation and buying experiences and is therefore targeting a dedicated loyalty promotion for children running shoes. As a customer, you also have access to an additional MY ACCOUNT page. As you love the Joy page that typically is updated with great surprises, go and visit it. Click **Joy**.



- Now notice that the 'Enjoy the long summer evenings' is showing on the left and has become a video. Also, the dresses to the right of the 'Enjoy your long summer evening' now show up from least to most expensive. Now there is a great dress promotion for the **Hermitage Fit and Flare Dress**. Select and click it to find details.



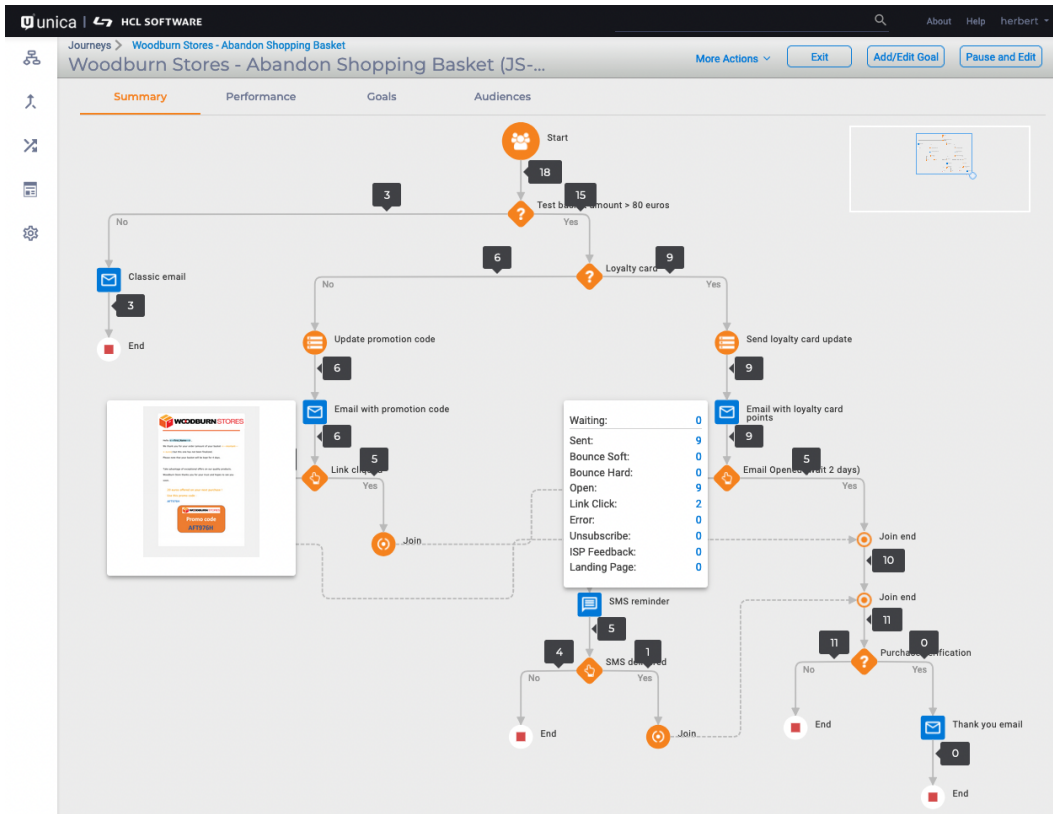
- Keep the red color and change the size to medium, click **M**. Then add it to your basket. Click **ADD TO BASKET**.

The screenshot shows the product page for the 'Hermitage Fit and Flare Dress'. The dress is red and priced at \$100.00 (original price \$250.00). The size 'M' is selected. The 'ADD TO BASKET' button is highlighted with a red border. The 'ADD TO WISHLIST' button is also visible. The product description and color/size selection options are clearly visible.

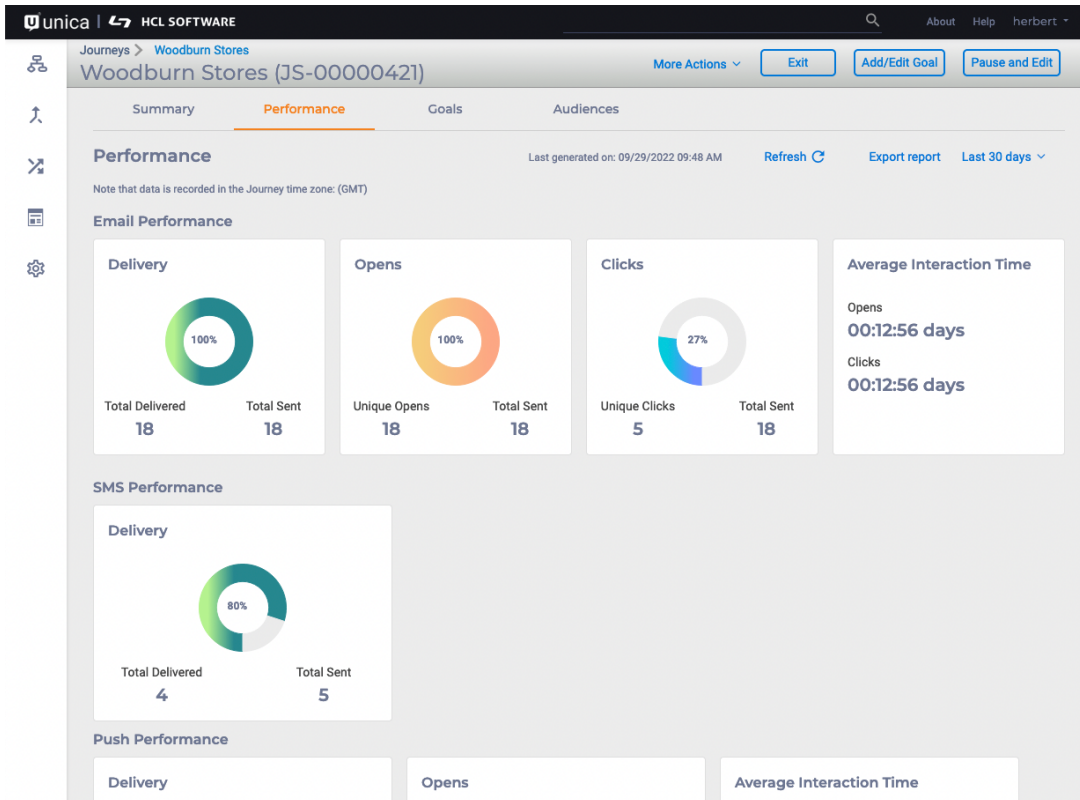
- The go and check it out. Click **CHECKOUT**.

The screenshot shows the product page for the 'Hermitage Fit and Flare Dress' with the size 'XS' selected. The 'ADD TO BASKET' button is highlighted with a red border. The 'CHECKOUT' button is also highlighted with a red border. The basket summary on the right shows the item added and the total price of \$100.00.

- You may decide to wait and abandon your purchase or go directly to step 10. If you would abandon, the marketing team may come to play and use other modules of HCL Customer Experience. They have a 360 view on all customers, including Mandy. The solution detects a basket abandonment in real time and automatically triggers a customer journey with HCL Unica, that pushes individualized communications to each customer. Here you see the new mail going out to Mandy, as the basket amount is higher the 80 euros and Mandy doesn't have a loyalty card yet. You can see the engagement on the email channel. Here you see what the marketing team has set up.



7. Notice how the teams can monitor the performance of their campaigns, here on the email, SMS and push notifications.

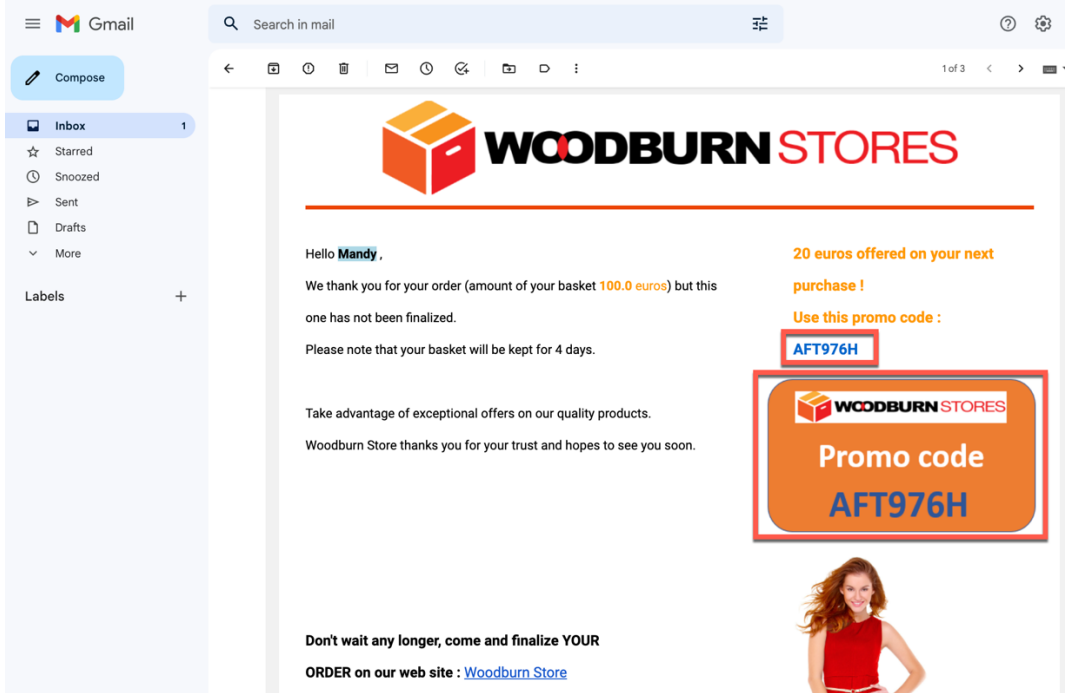


8. They may also set goals and monitor the achievement of their day-to-day objectives, like the rate of catch-up of abandoned basket here.

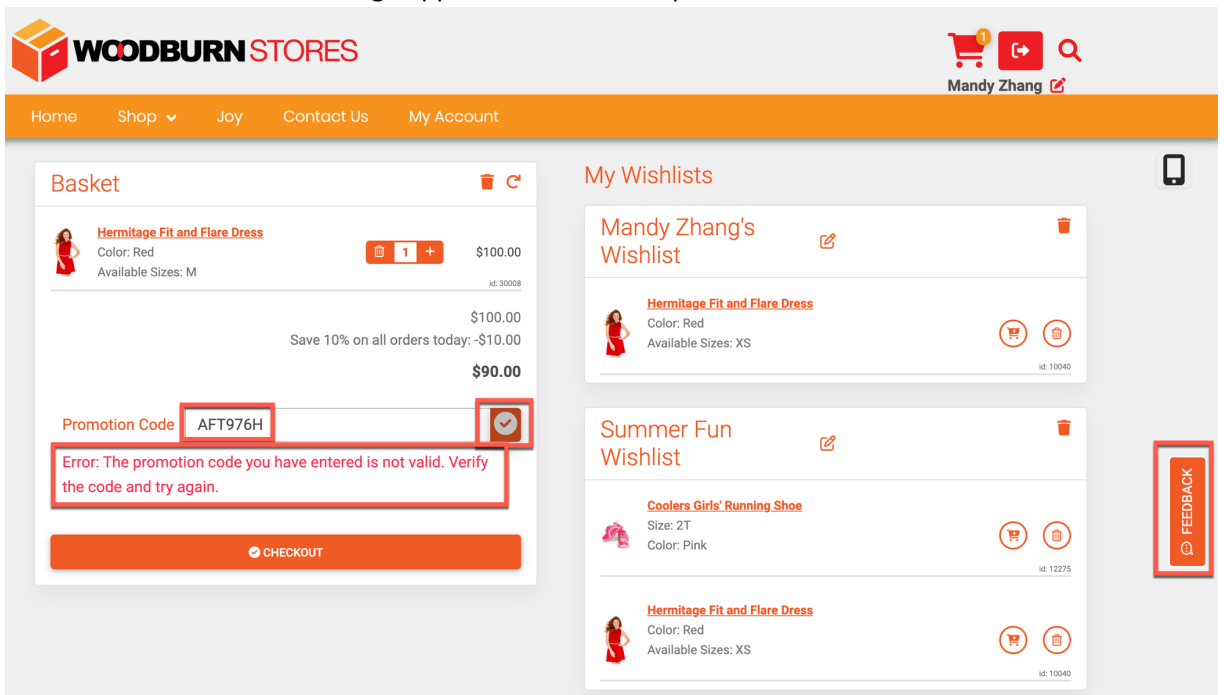
The screenshot displays the 'Add/Edit Goals' section of the Unica HCL Software interface. It features a sidebar on the left with navigation icons and a main content area with the following details:

- Page Header:** unica | HCL SOFTWARE, Refresh, Goal
- Breadcrumbs:** Journeys > Woodburn Stores
- Section Title:** Add/Edit Goals
- Total Goals:** (5)
- Goal 1: Email opening with loyalty point**
 - Contacts/Responses | MONTHLY
 - EMAIL: Email with loyalty card points | open | 5
 - Goal Achieved till Date : 9
 - Progress: 100% (Green circle)
 - Current Month : 1
 - Monthly Target : 5
 - Goal Achieved : 9 (180.00%)
- Goal 2: Email opening with promotion code**
 - Contacts/Responses | MONTHLY
 - EMAIL: Email with promotion code | open | 7
 - Goal Achieved till Date : 6
 - Progress: ~85.7% (Green circle)
 - Current Month : 1
 - Monthly Target : 7
 - Goal Achieved : 6 (85.71%)
- Goal 3: Classic email sent**
 - Contacts/Responses | MONTHLY
 - EMAIL: Classic email | sent | 7
 - Goal Achieved till Date : 3
 - Progress: ~42.86% (Orange circle)
 - Current Month : 1
 - Monthly Target : 7
 - Goal Achieved : 3 (42.86%)
- Goal 4: SMS reminder**
 - Contacts/Responses | MONTHLY
 - SMS: SMS reminder | delivered | 5
 - Goal Achieved till Date : 4
 - Progress: 80% (Green circle)
 - Current Month : 1
 - Monthly Target : 5
 - Goal Achieved : 4 (80.00%)
- Goal 5: Thank you email following a purchase**
 - Contacts/Responses | MONTHLY
 - EMAIL: Thank you email | sent | 5
 - Goal Achieved till Date : 0
 - Progress: 0% (Grey circle)
 - Current Month : 1
 - Monthly Target : 5
 - Goal Achieved : 0 (0.00%)

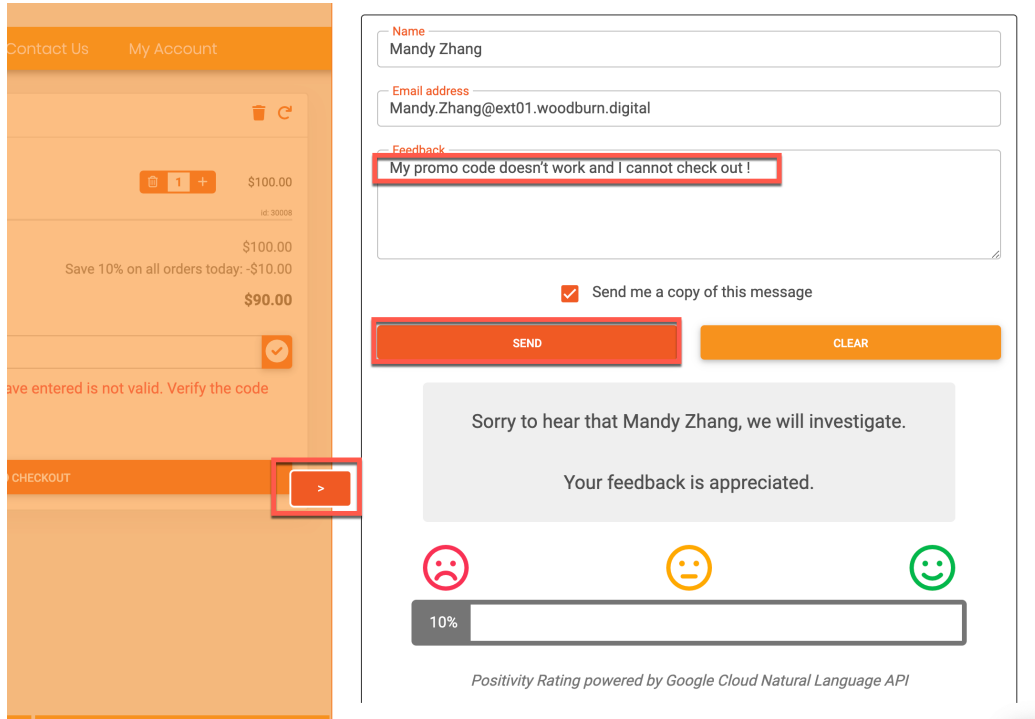
- Mandy may receive a personalized follow-up email (with the dress put in the basket and new promo code). She copies the code, clicks to open the site again.



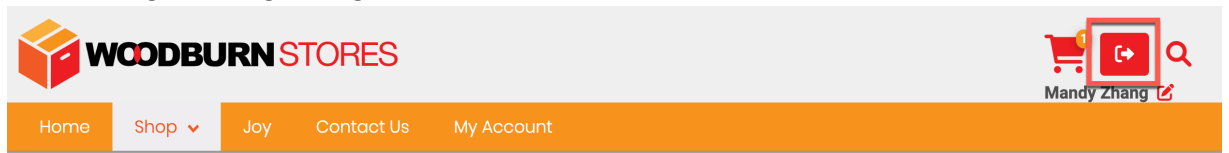
- And this would bring you to the same checkout page with the basket ready for check out. And this is the place you left on step 5. Enter the Promo code: **AFT976H** and click to validate and then notice that the code is not working! We have all experienced these kinds of issues. Then check it out. Click **CHECKOUT**. Notice that nothing happens and therefore provide feedback. Click **FEEDBACK**.



- You are automatically identified with your name and email address. Now report the issue with the checkout, e.g. with 'My promo code doesn't work and I cannot check out !'. Enter it in the feedback field and click **SEND**. Notice it has identified negative feedback and will therefore create an alert at Woodburn Stores. You will not receive a mail, as this is not configured. Now close it.



- And then log out using the log out icon and confirm.

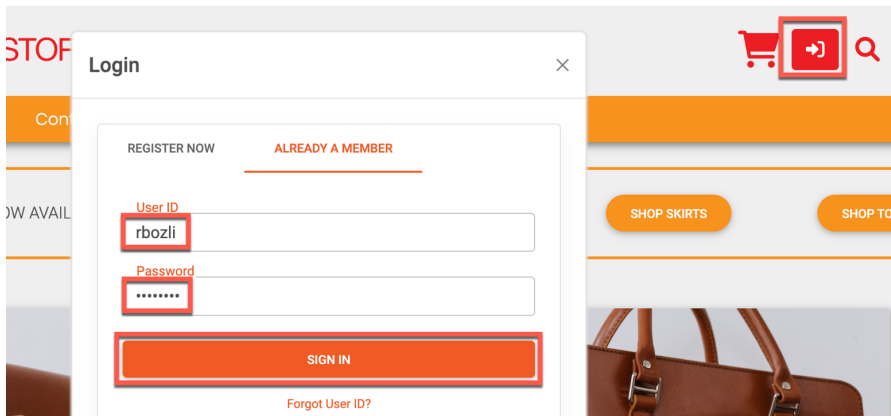


Congratulations. As Mandy you have discovered that Woodburn Stores' website is showing unique information to you. You have reported an issue with the site. Let's see how this going to be handled.

Part 3: Rose updates the site

And finally, as Rose, the marketing manager of Woodburn Stores, who is authorized to see others content to ensure the site is optimized for each member. You will work on the feedback from Mandy and first check what Mandy was seeing. Then you will work on the feedback and correct the site, add a new chic page configured with chic products and men suits that would only show to men. And you will test if this all works well on all devices.

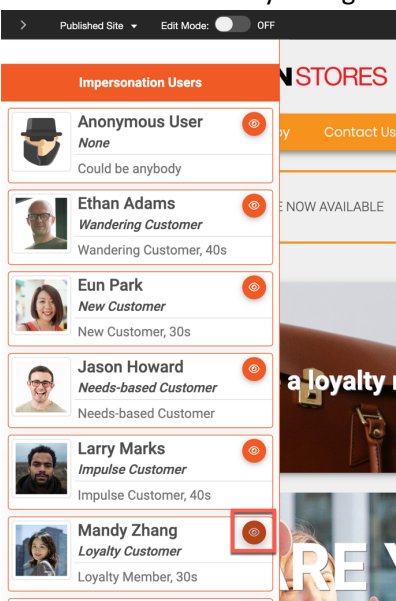
1. Now log in as Rose. Click the log in icon, enter your credentials: User ID **rbozli** and Password **HCL-Dem0** and click **LOG-IN**.



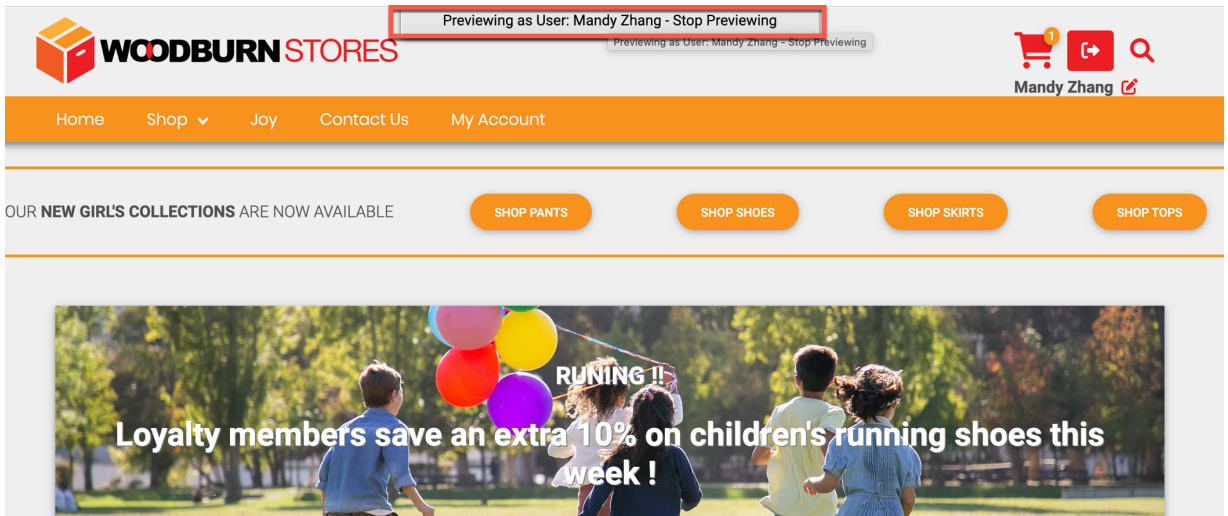
2. Rose wants to see what Mandy was seeing. In her role, she has access to **impersonation**, which is a powerful feature that enables one to access another user's system as though you are that user. Enable the impersonation first. Click the impersonation icon on the bottom left.



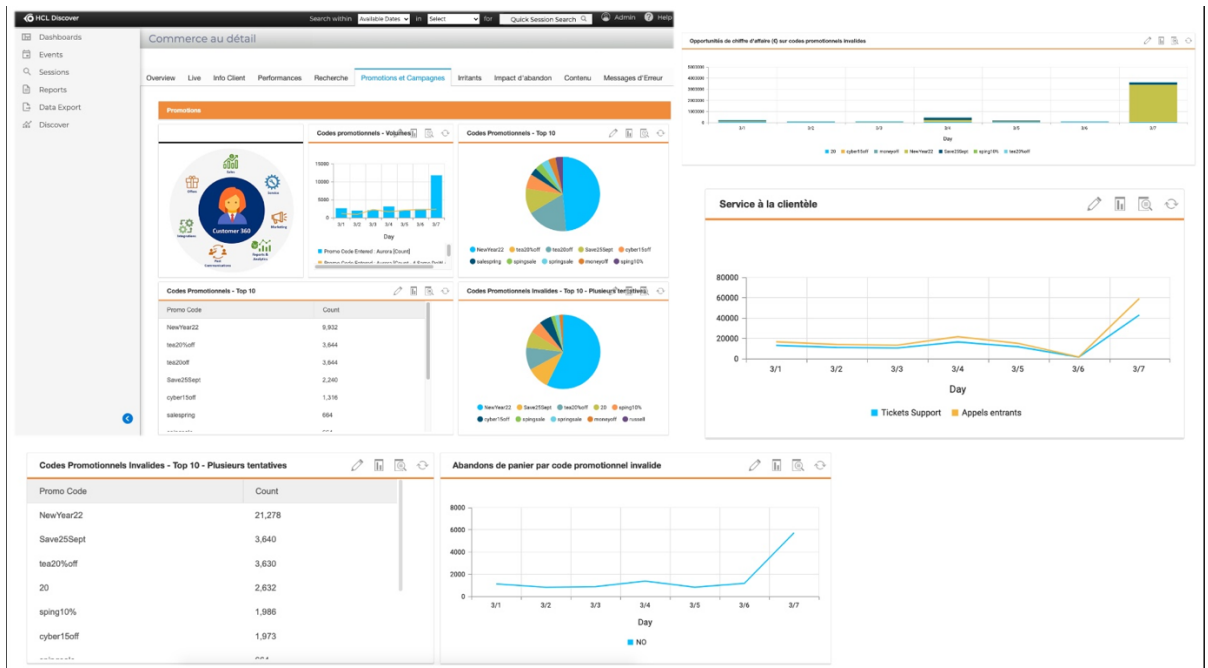
3. And then select Mandy Zhang to check what she was seeing.



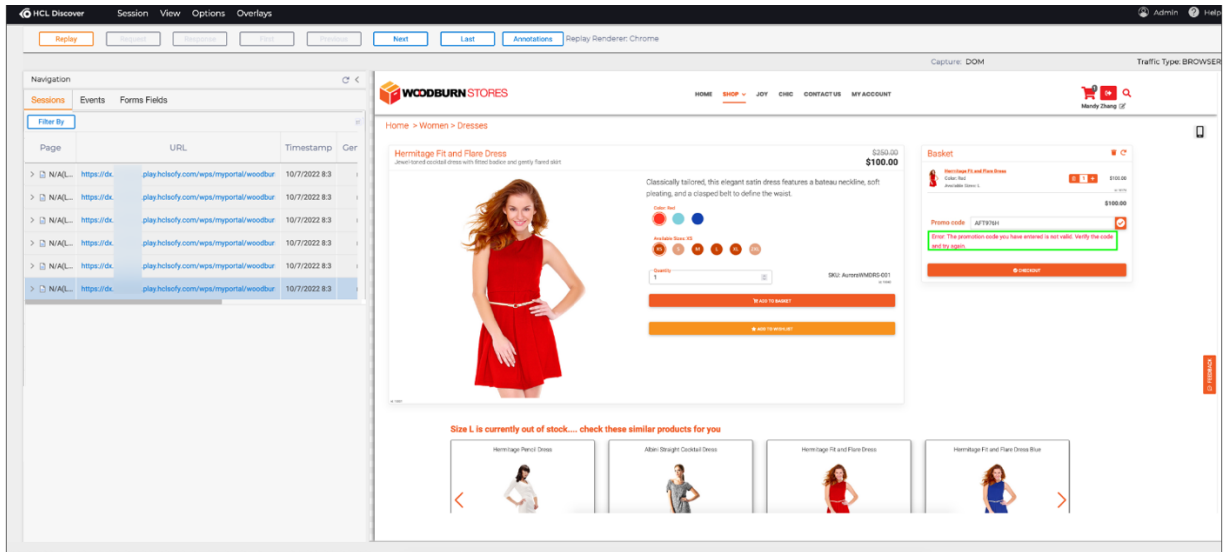
- Notice the **preview bar**. You will now see the loyalty teaser that has the typo on running. You will now correct this. First exit the impersonation, by moving over the preview part and then clicking on **Previewing as User: Mandy Zhang – Stop Previewing**.



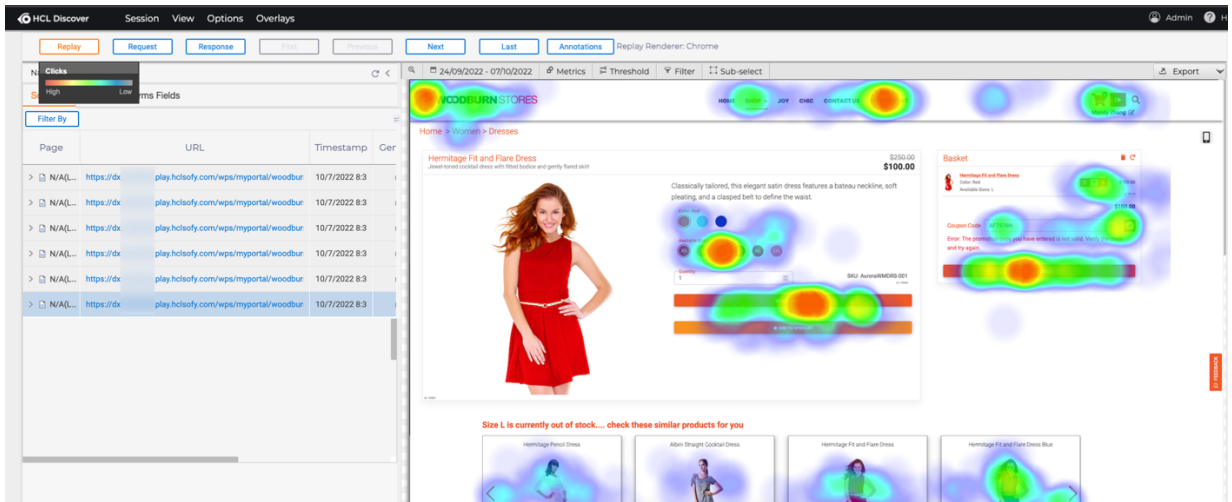
- You may discover how Rose could use HCL Discover, as part of HCL Customer Experience, to better analyze what is happening on the site. You may also do directly to step 8. Rose may use a rich set of detailed and interactive reports and KPI dashboards, the Marketing team understands immediately and in real-time how their campaigns are performing, while getting full visibility onto the factors that affect their success, down to the root cause of every impediment faced at the individual level. By truly understanding the very nature of every obstacle, coupled with the ability to quantify precisely their impact on the business and on, for instance, the volume of incoming calls to their Customer Service call centers, teams now have access to actionable insights that they can leverage to get those issues prioritized and fixed. Here you see of those reports Rose has access to.



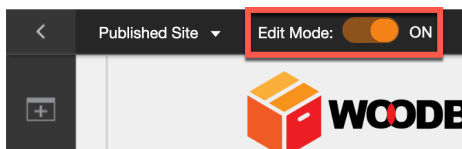
- The session replay gives teams confidence onto the experience that was received by visitors and the nature of the struggles encountered by those, like unrecognized promo codes. Here is again what Rose may see and use.



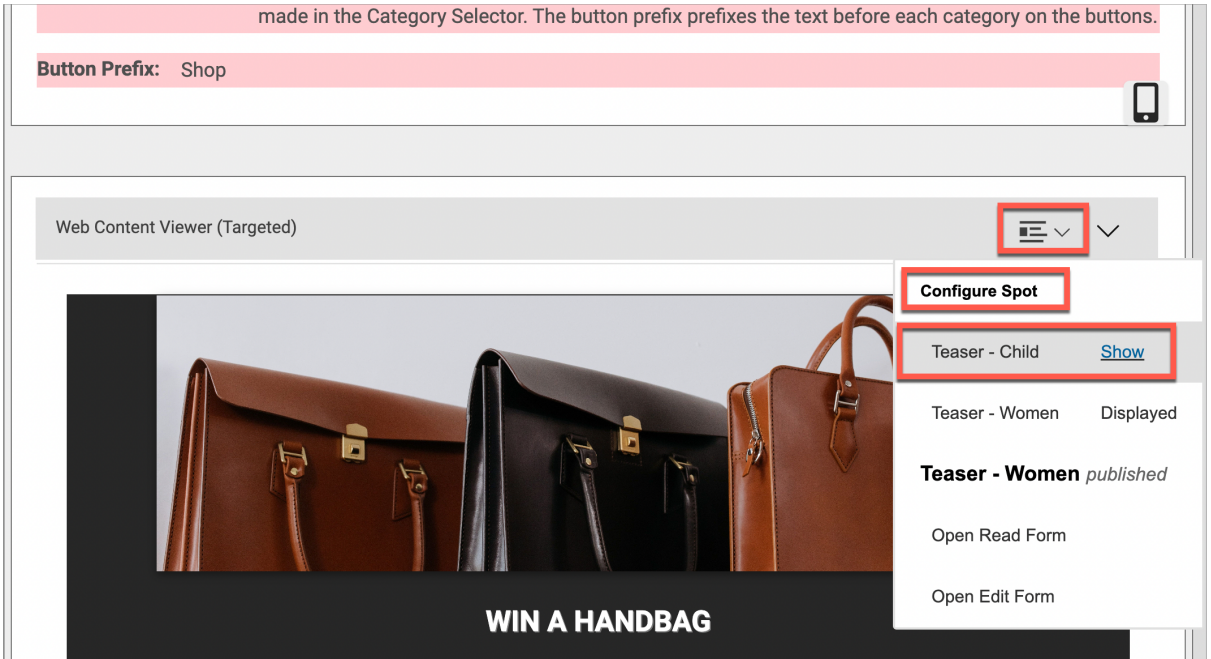
- And heat maps that help optimizing the experience delivered on those platforms.



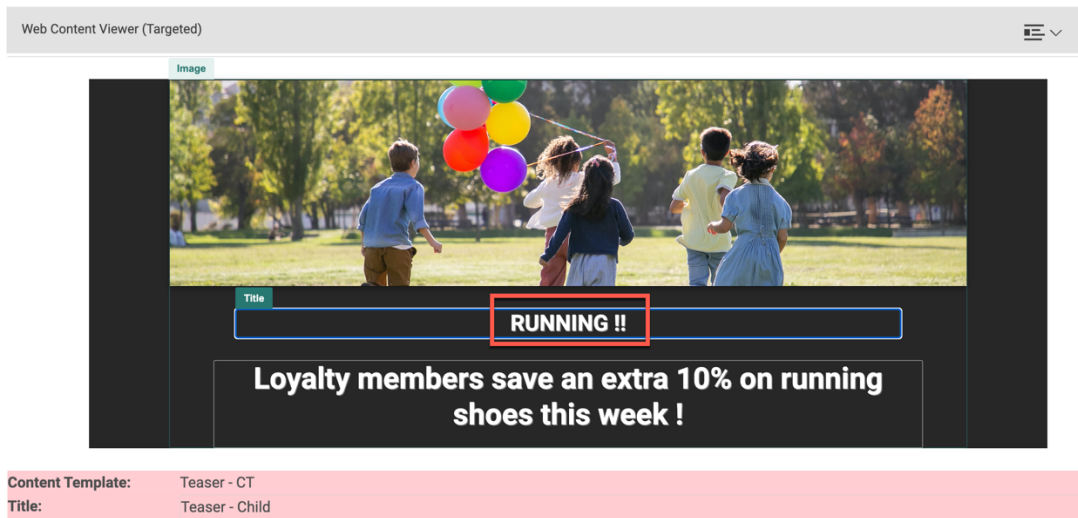
- Now enable the **Edit Mode**.



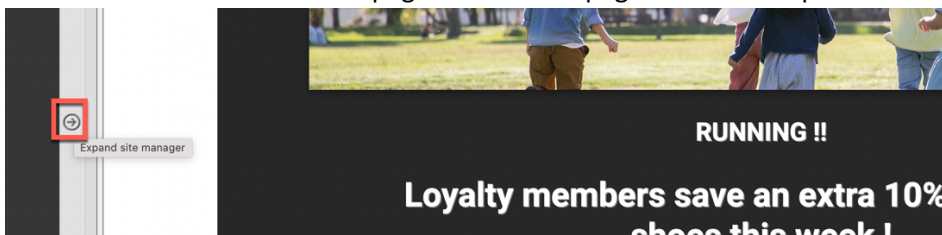
- Notice that the page uses a **What You See Is What You Get (WYSIWYG)** mode. When you hover any of the fields, you can change them. You also see additional meta-data that may help you manage what and how to show. As you are an employee, you see the default teaser targeted to women. Open the content menu and then click **Show** on the Teaser - Child teaser that is targeted for loyalty members with children.



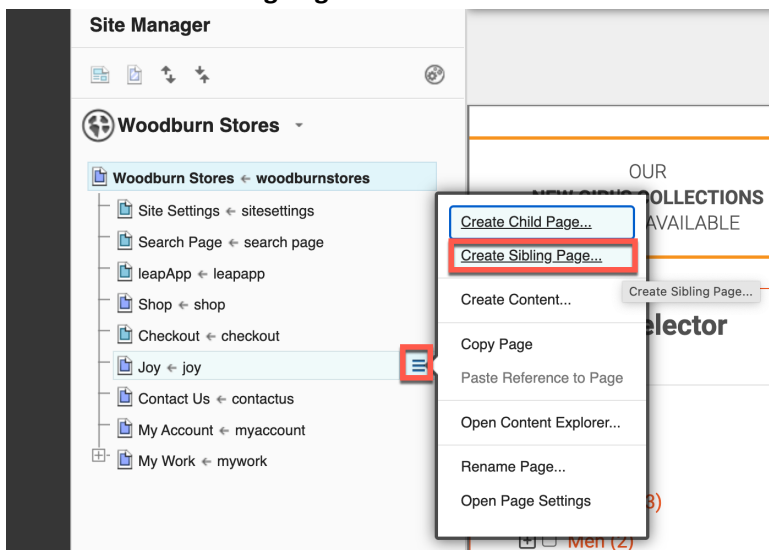
- Enter the Title text field and correct the spelling error, add an **N** to change it to **RUNNING**. Notice that you can't change the font style, size, color, etc. The IT team controls exactly what you can do, where and when.



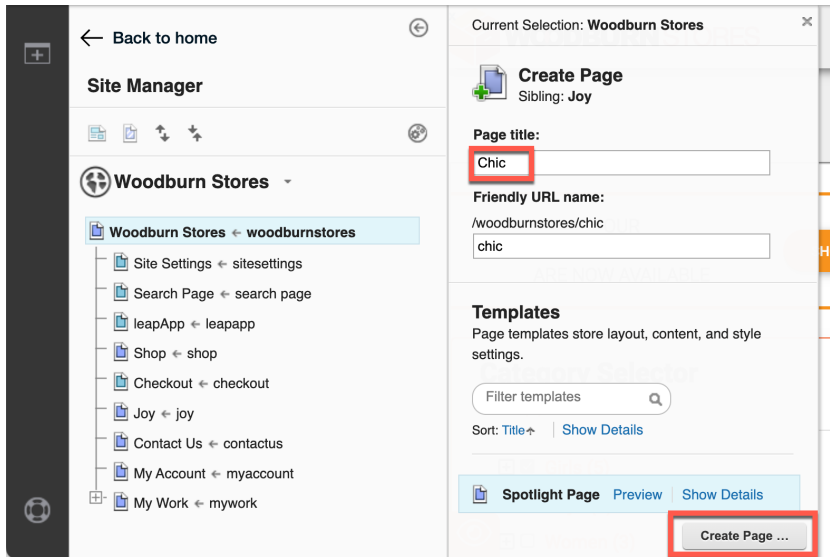
- And then exit the field. Your change is published immediately. It may also be configured to go through a workflow process or be pushed later to a rendering server. As you can see, it is very easy to author any content, without any support from IT, but under their control. Now you may have noticed that there were a lot of searches on the word 'chic' on your site recently and you may increase the revenue with a dedicated Chic page. Create that page now. First expand the Site Manager.



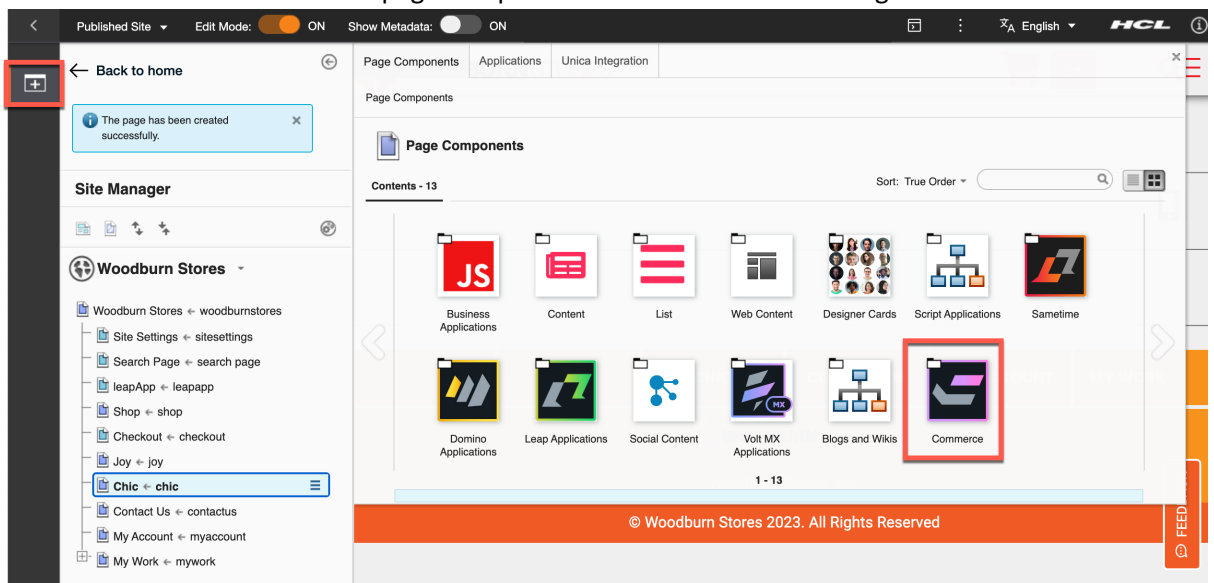
- This should be right after the existing Joy page. Open the context menu of the Joy page and click **Create Sibling Page...**



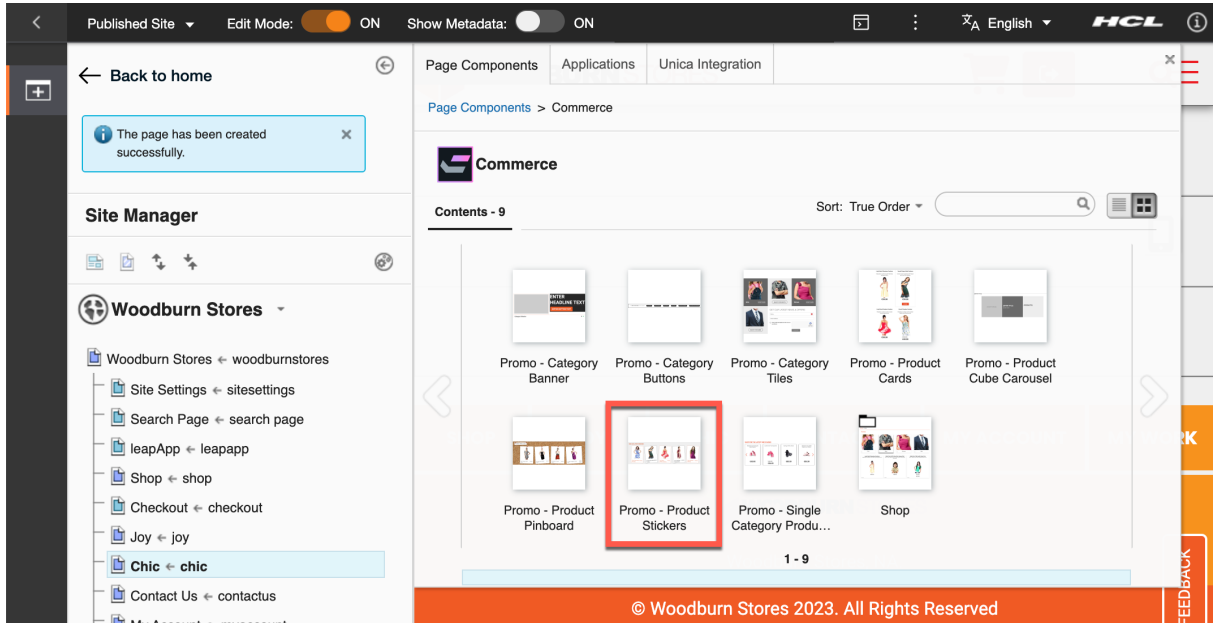
- Enter the name of the page, **Chic**, notice you may manage the friendly URL name, ensure the **Spotlight Page** template is selected (other templates are available as well) and click **Create Page...**



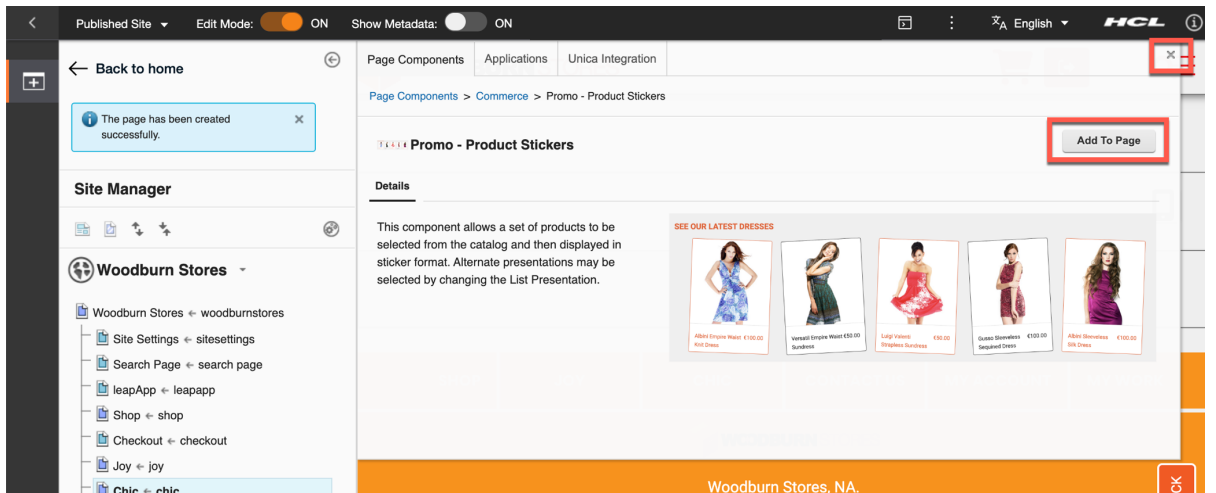
- This creates an empty new Chic page. Then add a list of chic products. Click the **Add page components and application** icon. This gives you access to manage page components for content, lists, applications, etc. You may have a look around on all these components. Select the **Commerce** icon that has all page components on HCL Commerce integration.



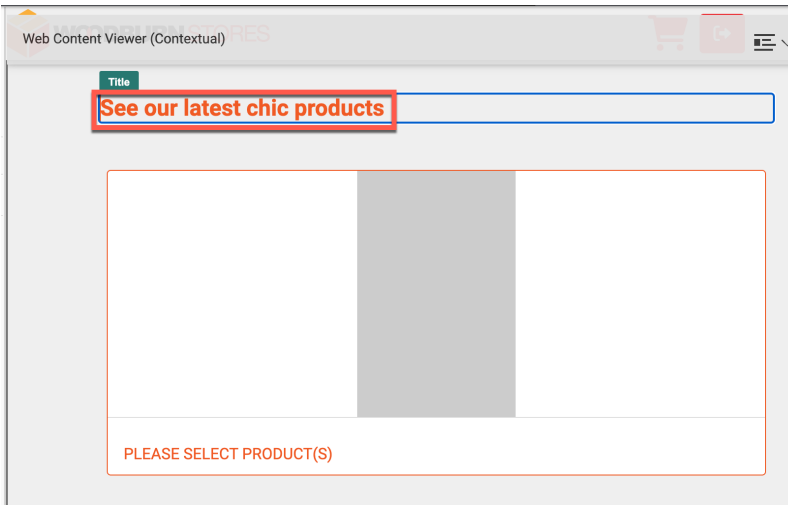
- Then you see a large set of dedicated components that allow you to control what and how to show from Commerce. You first want to promote a list of selected products. Have a closer look at the Promo – Product page components. Open **Promo – Product Sticker**. Click for details.



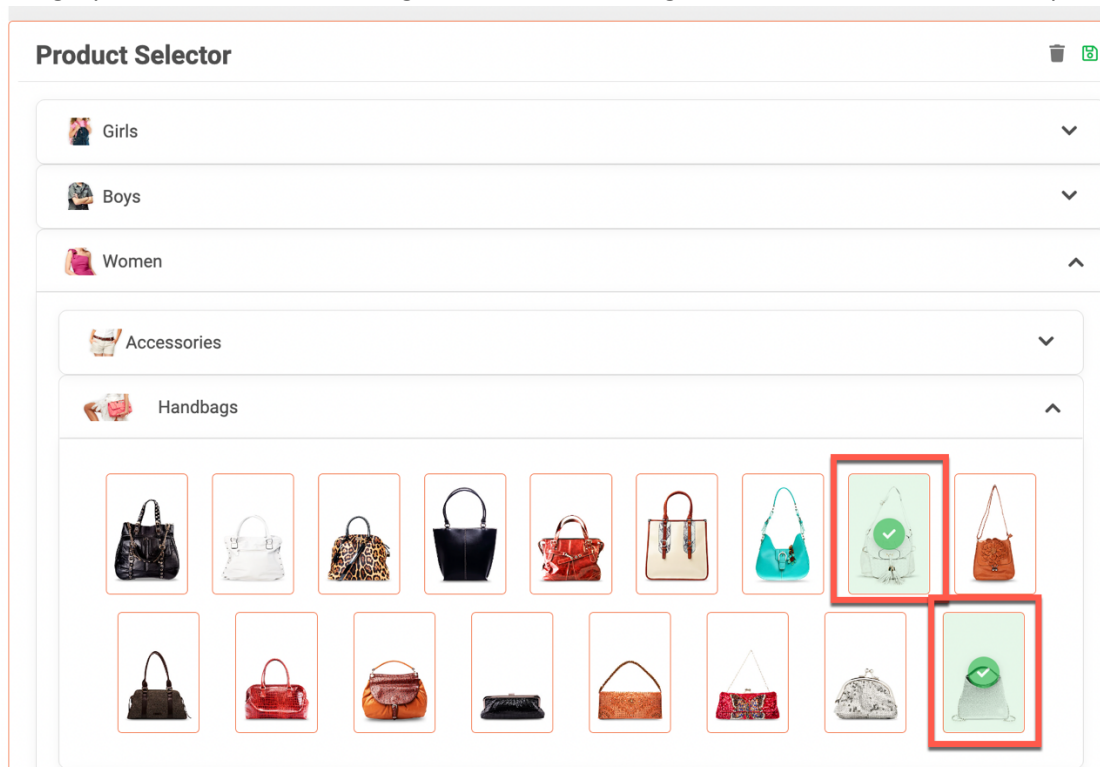
- Here you see the details. This looks great! Add this to the top of the page. Click **Add to page** and then close it.



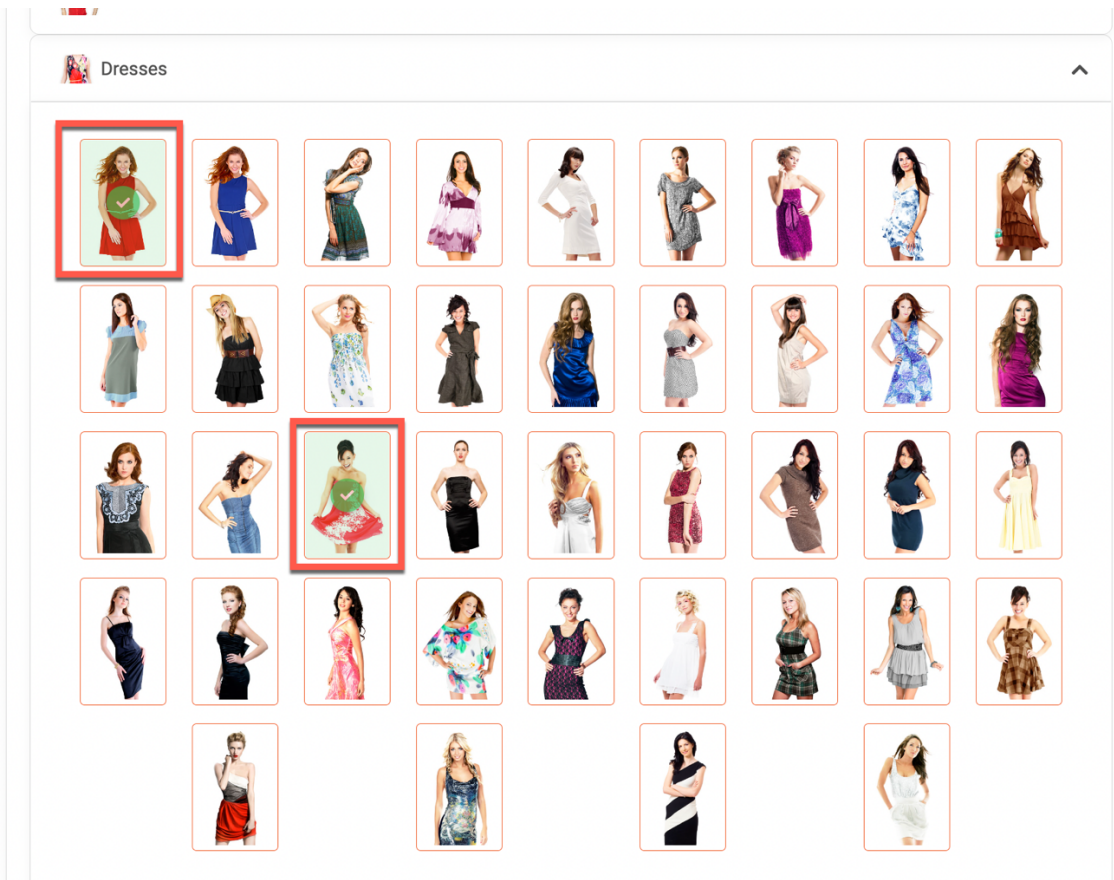
- Then update it with the right chic content and products. First update the title. Change it to **See our latest chic products**. Notice you cannot change the font type, color, size, or position. This has been agreed with the IT team.



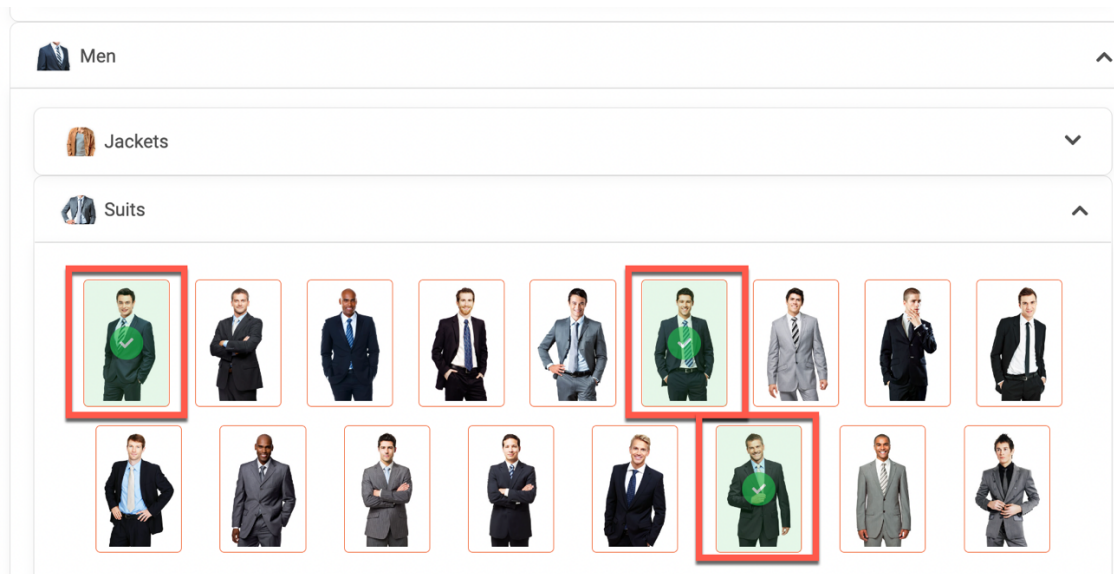
- Then select a few chic products to promote, for example some women handbags, dresses, and men suites. In the Product Selector below, open the Women, Accessories, Handbags category and select a few handbags. These are all managed in HCL Commerce. For example:



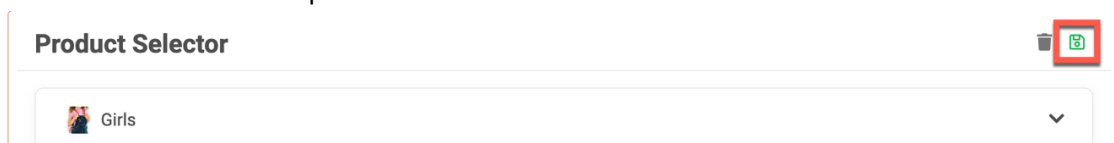
19. Then add a few dresses as well.



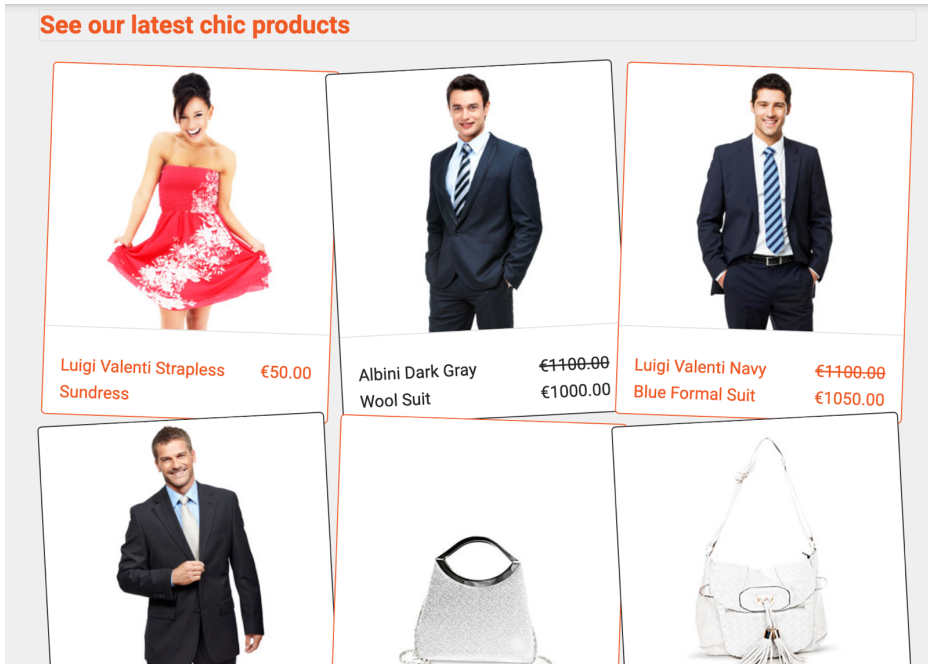
20. And some men suits:



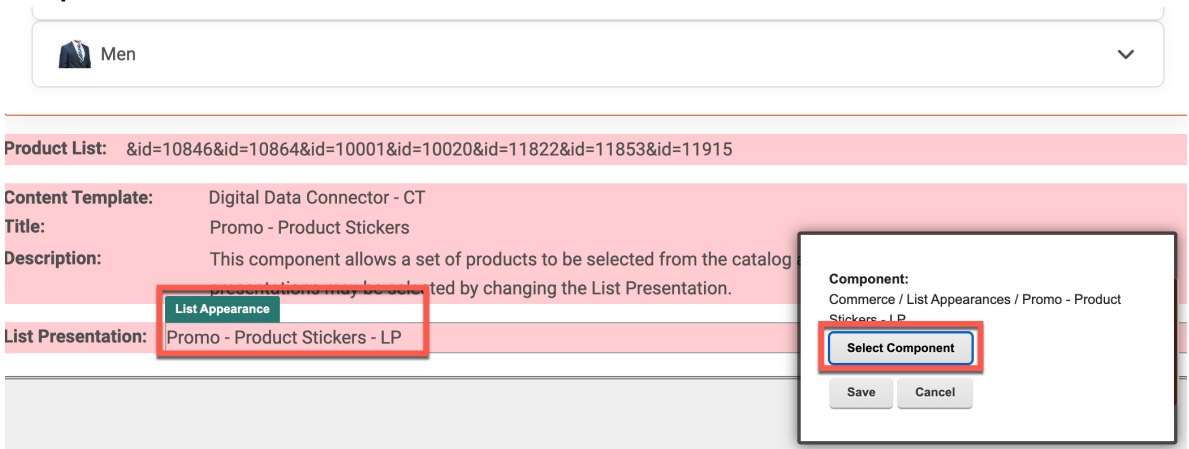
21. And then save it on the top of the Product Selector. Click the save icon.



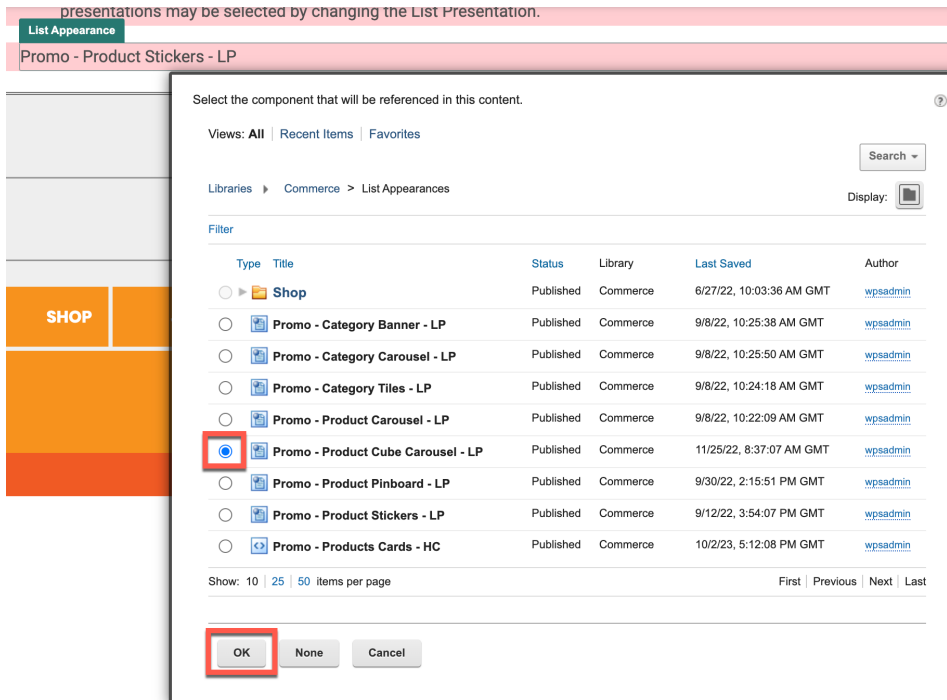
22. Now it shows your selection of products with details on the name and prices.



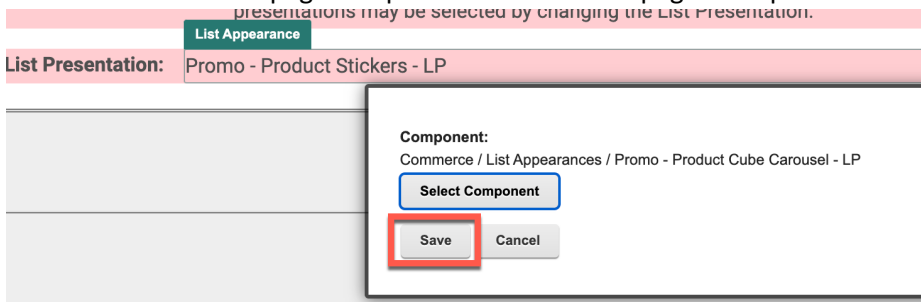
23. If you scroll down, you see the product IDs you have selected in the product list. You may update the title and description and how this list should appear. Choose a different appearance, or list presentation, now. Click **Promo – Product Stickers – LP** and then **Select Component**.



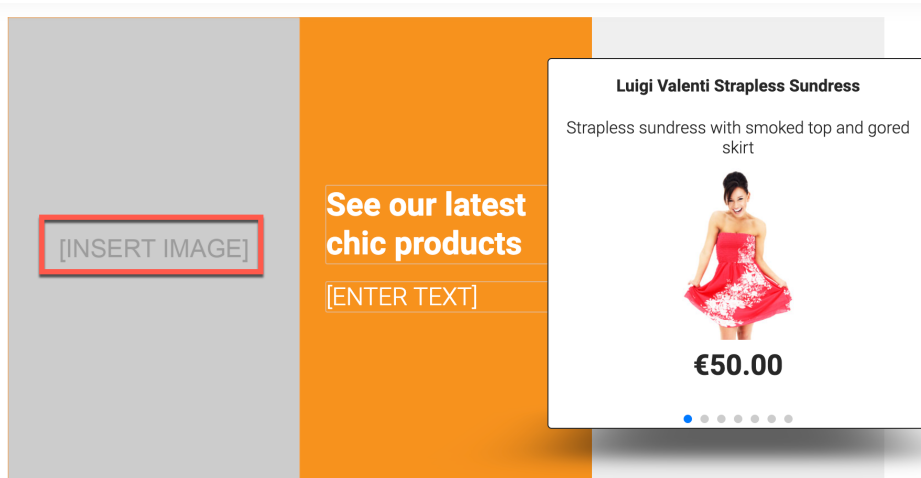
24. Here you see a list of List Presentations available for you. Select the **Promo – Product Cube Carousel** and click **OK**.



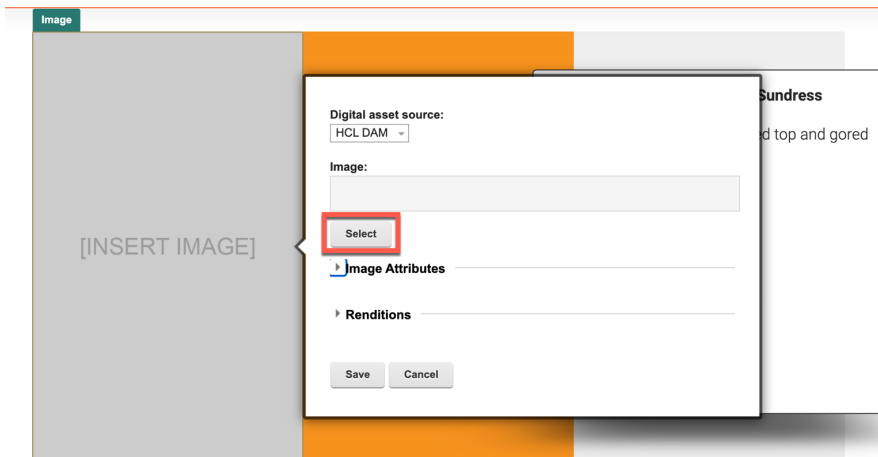
25. And then click **Save** to replace. Notice you may have selected this also directly as a Promo – Product Cub Carousel page component to add to the page in step 15.



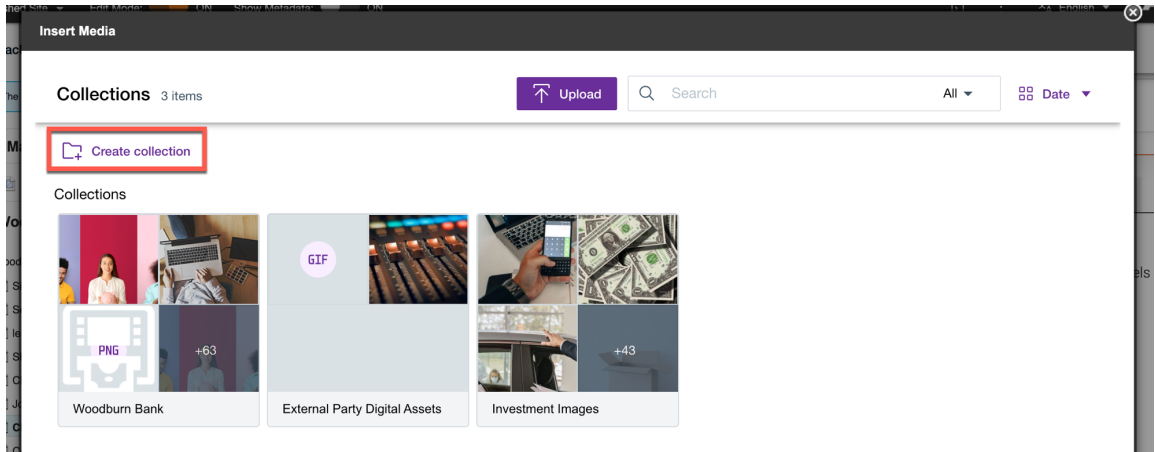
26. Now your page component looks quite different. You have an additional image on the left, a description field and the products show on the right (in edit mode, only the first one shows). Change the image first. Click on **INSERT IMAGE**.



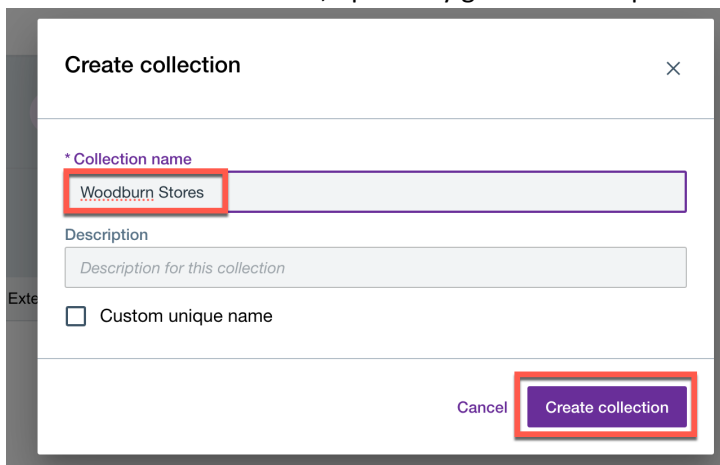
27. Then click **Select**.



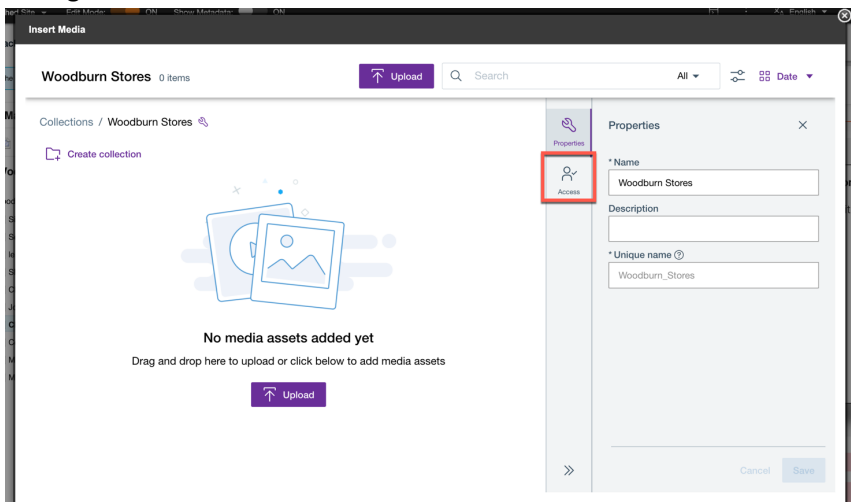
28. To facilitate completing this new page, you may use some resources we have provided you. Open the zip file you downloaded as part of the Lab prerequisites. In the file, you will find all the artifacts required for creating the page. First add them into a new collection the **Digital Asset Manager**. Click **Create collection**.



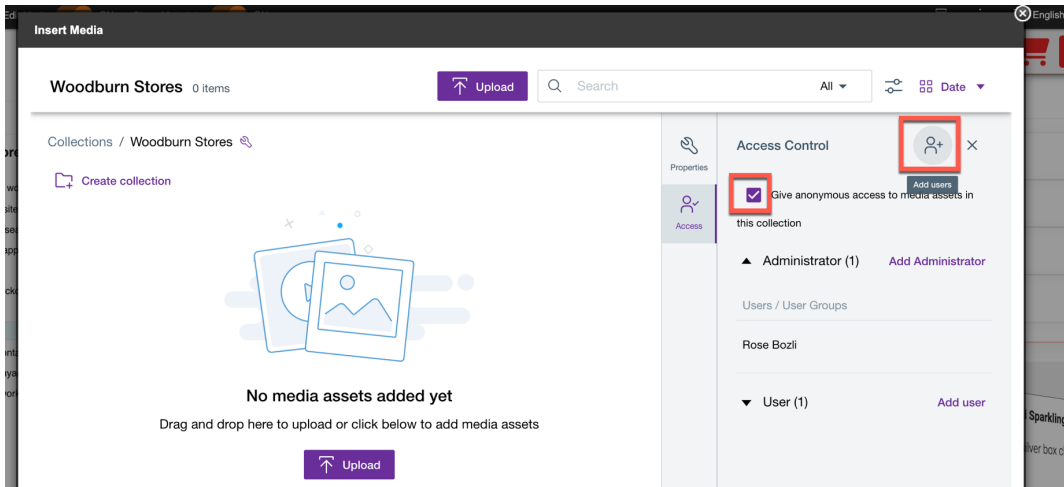
29. Name it **Woodburn Stores**, optionally give it a description and then click **Create collection**.



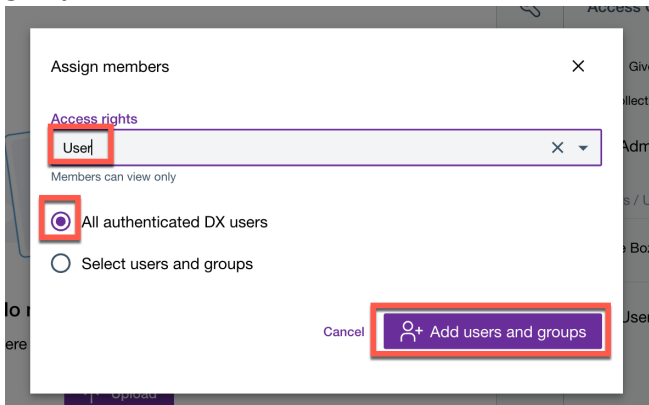
30. Now grant access to all users this collection. Click **Access**.



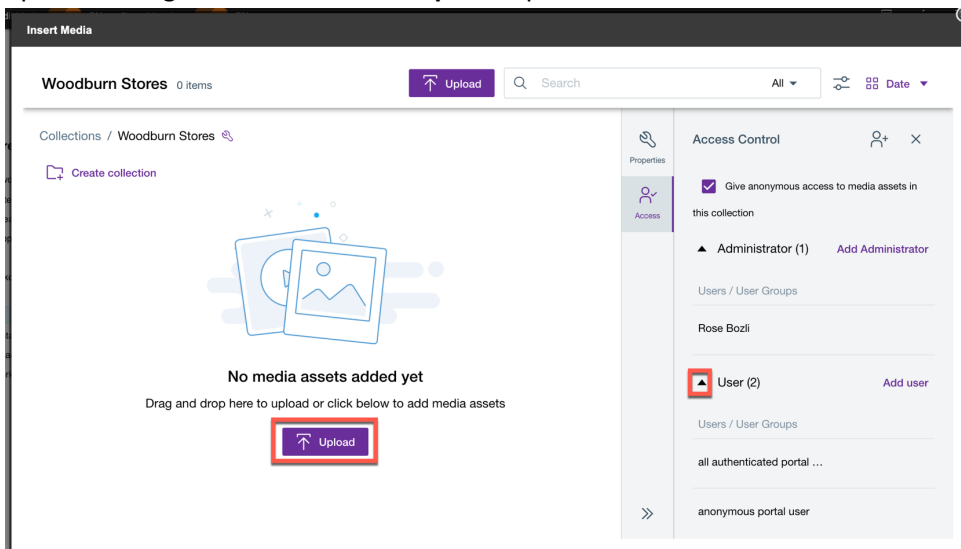
31. First grant access to anonymous users. Check the checkbox **Give anonymous access to media assets in the collection**. Then grant access to all authenticated users. Click the **Add User** icon.



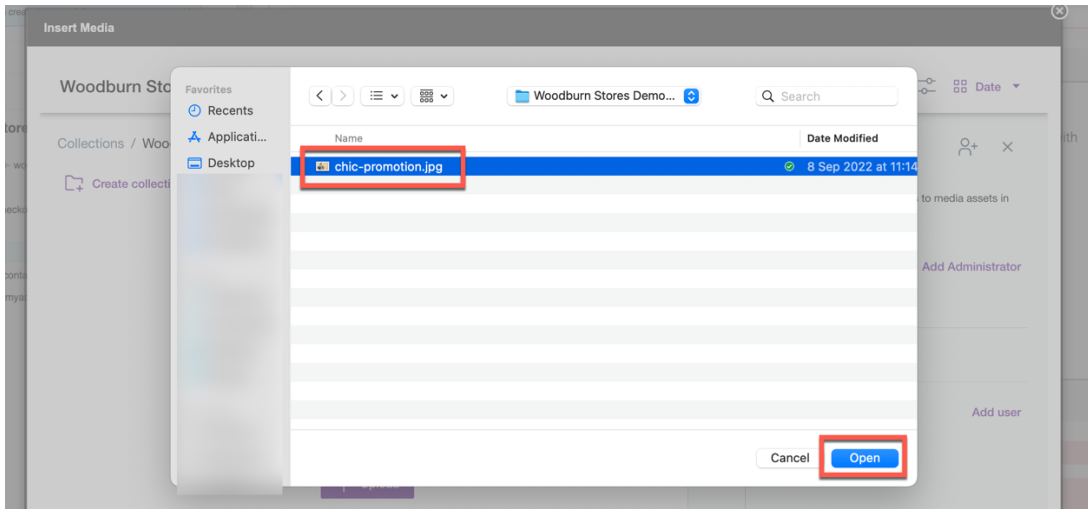
32. Select **User** under **Access Rights**, then **All authenticated DX users** and click **Add users and groups**.



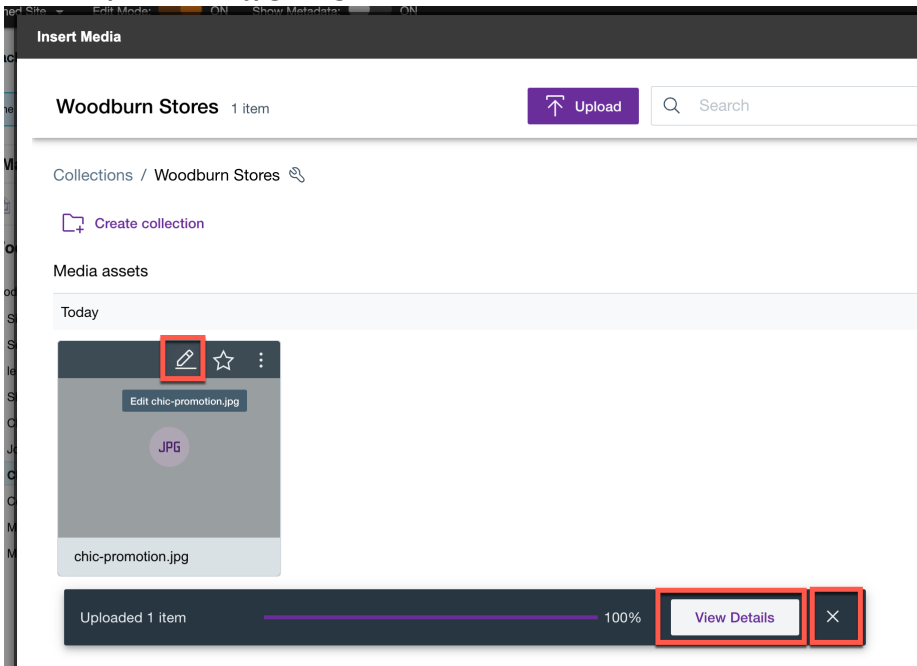
33. Check if both anonymous and all authenticated users are now users of this collection. Then upload the digital assets. Click the **Upload** option.



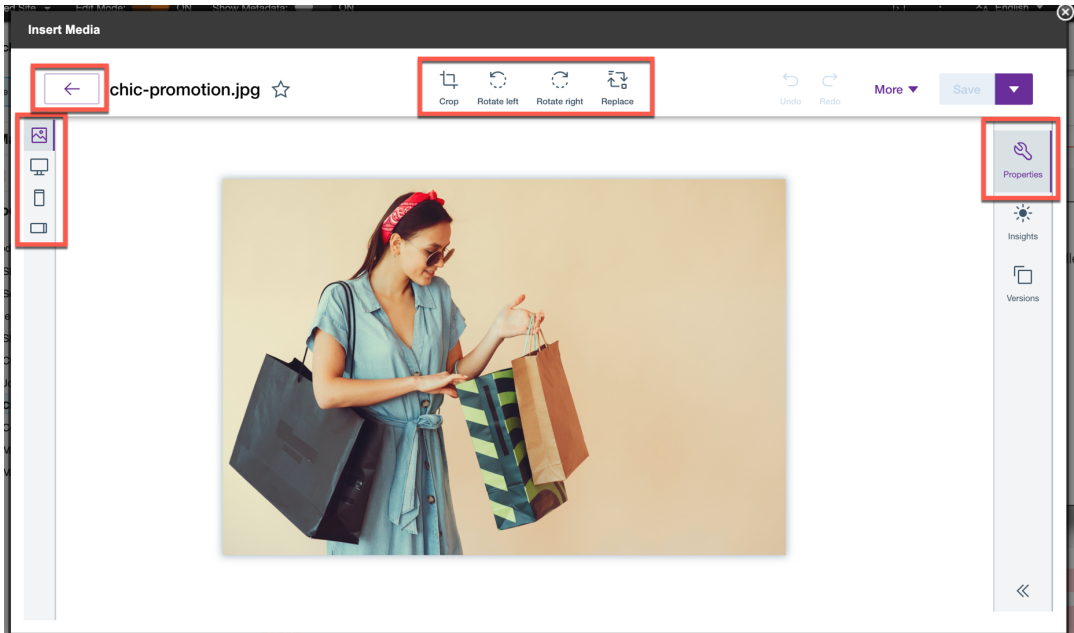
34. Then select the digital assets in your folder you just unzipped and click **Open**. Feel free to add more, including videos, files, etc.



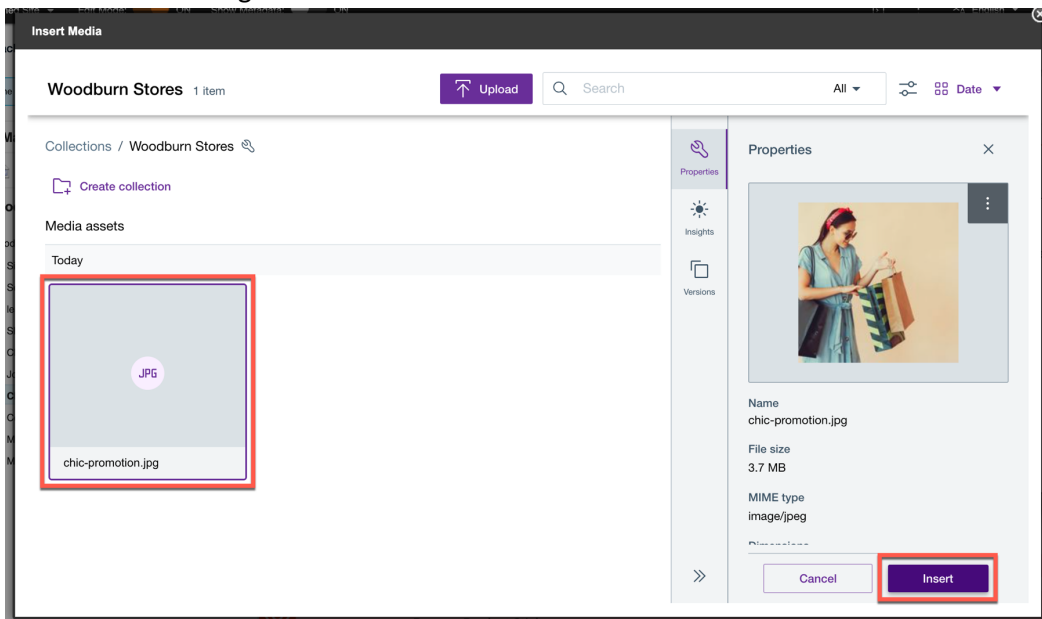
35. Once uploaded, you may view the details of the upload and close the notification. Then edit the **chic-promotion.jpg** image. Click the edit icon.



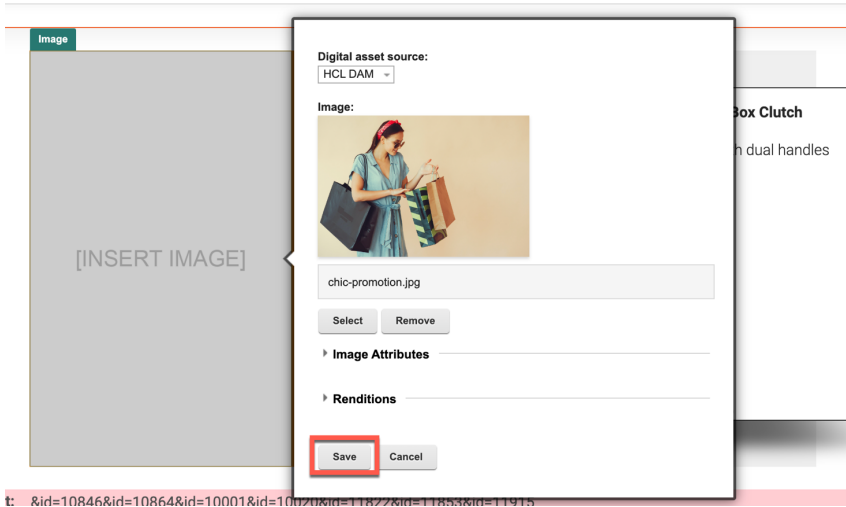
36. Notice all the different renditions, options to crop, rotate and replace any rendition, additional information, insights and version. The go back. Click the <- icon.



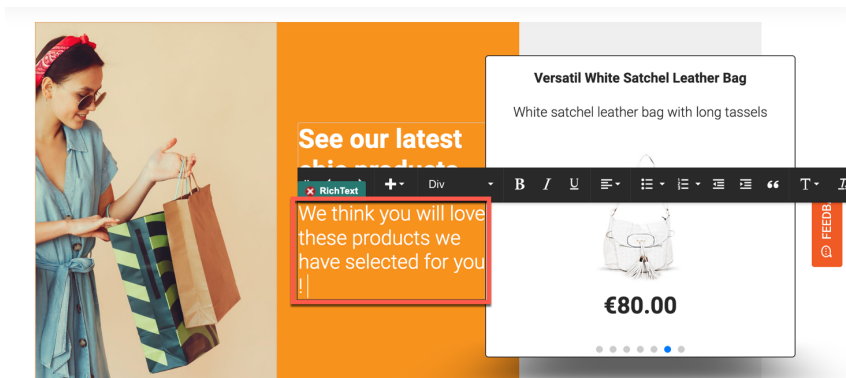
37. Then select the image and click **Insert**.



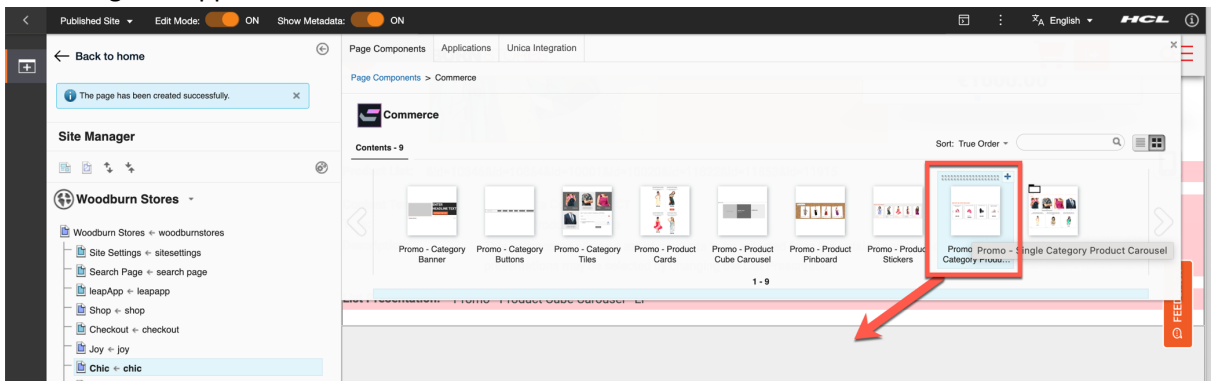
38. And then scroll down and click **Save**.



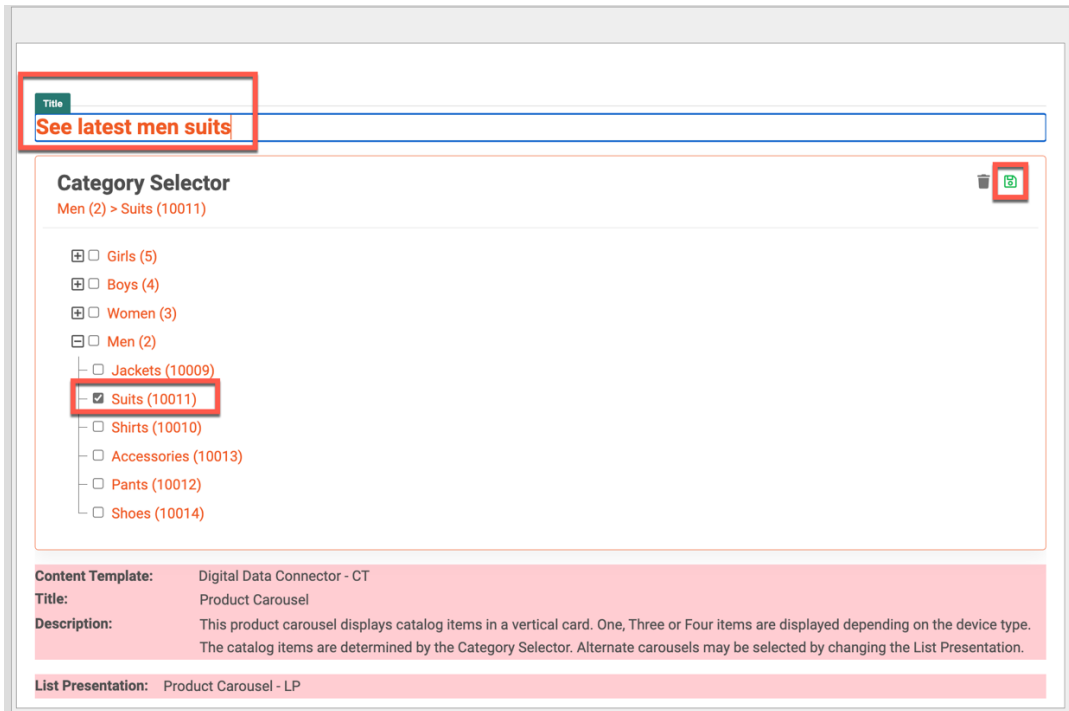
39. Then update the details field. Enter it and change it to **We think you will love these products we have selected for you !** Notice that this is a rich text field, and you have many options to format this.



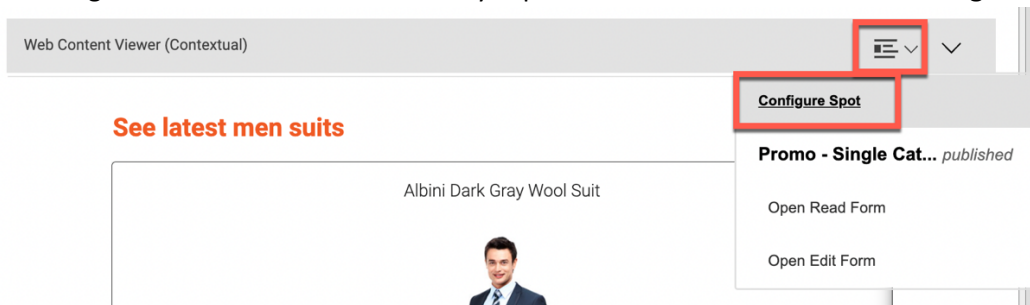
40. Now add a list of suits below this. This is managed with a Commerce – Promo – Product page component. Again, there are several options for you available. Use the carousel. Click **Add page components and applications** again and then drag & drop the **Promo – Single Category Product Carousel** page component. You'll see the drop zones in green appear.



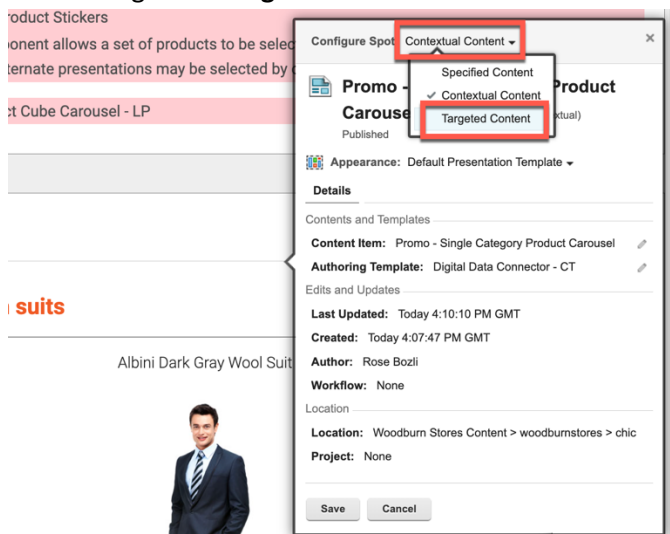
- Then update the **Title** to **See latest men suits** and select the category **Suits** under Men. Click the save icon.



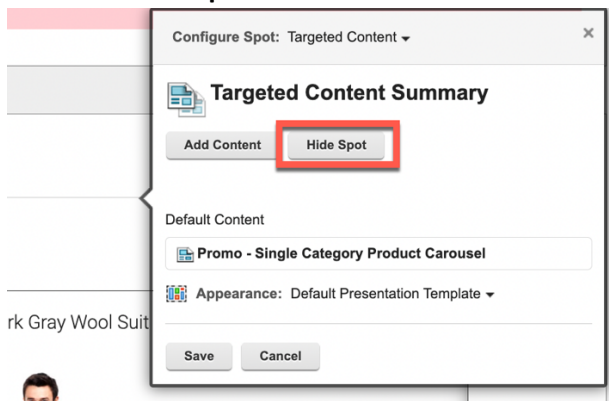
- Now target this to be shown for men only. Open the content menu and click **Configure Spot**.



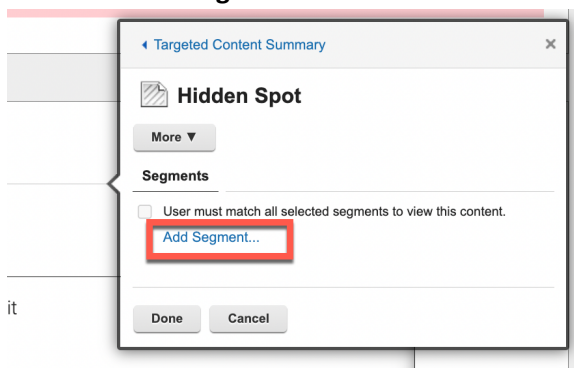
- Then change it to **Targeted Content**.



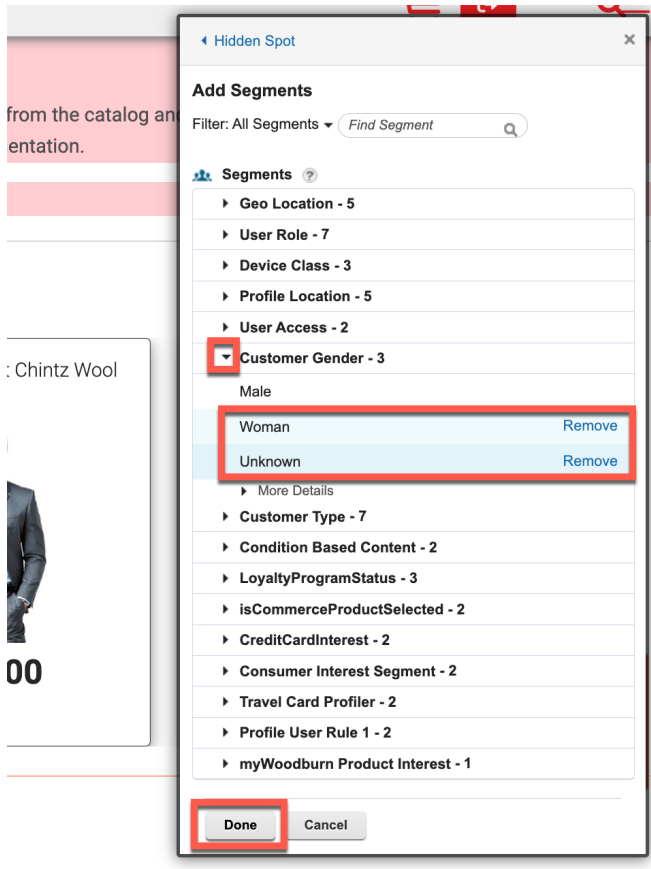
44. Then click **Hide Spot**.



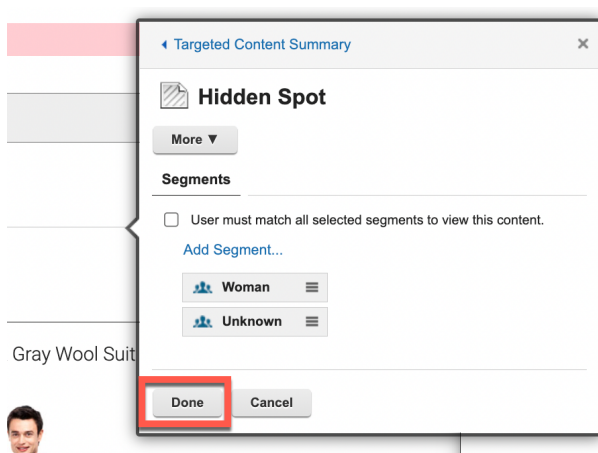
45. Then click **Add Segment...**



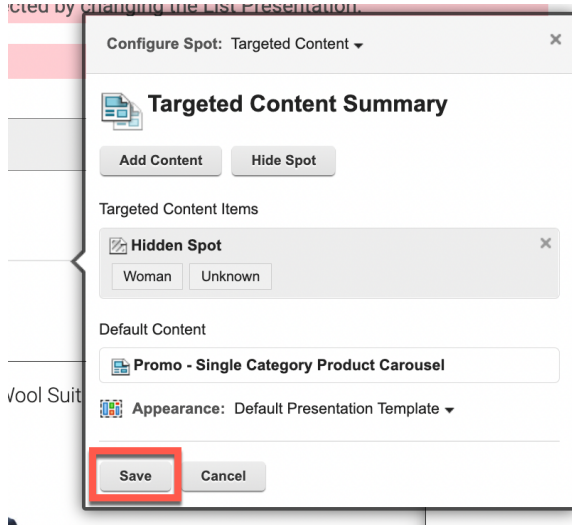
46. Here you see a large set of segments. They may be configured from external solutions, like HCL Unica Interact. Now select from **Customer Gender, Woman** and **Unknown** using the **Add** icon. Then click **Done**.



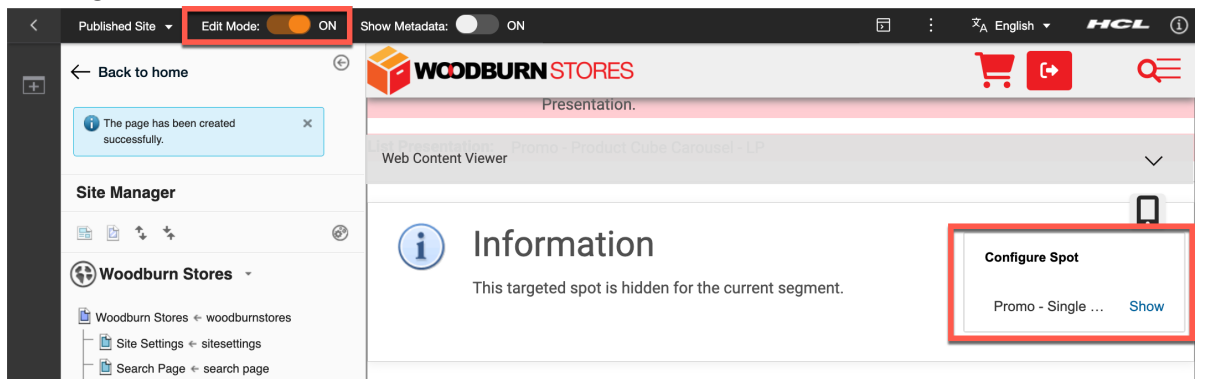
47. Check that both are selected and click **Done**.



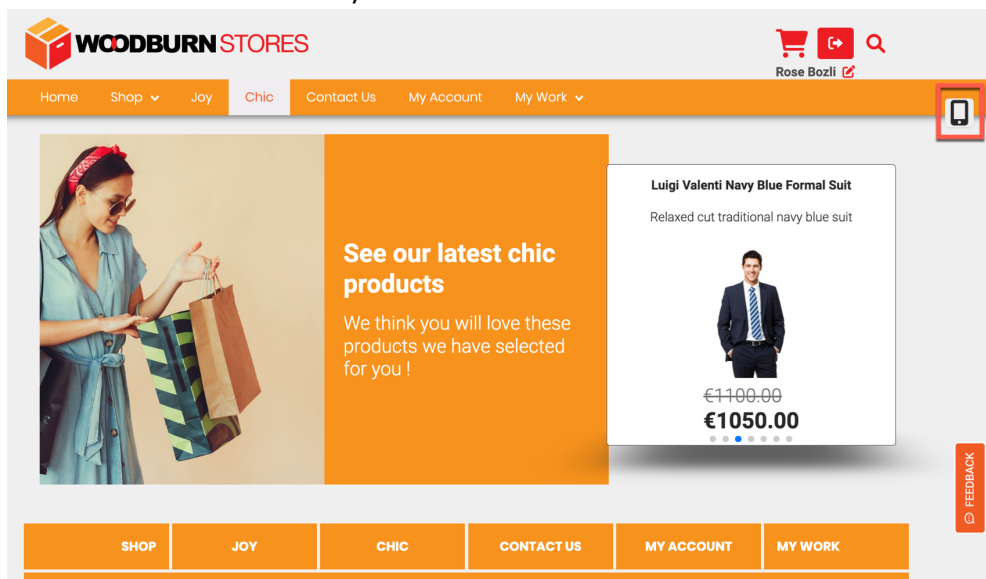
48. And then click **Save**.




49. Notice it now disappears, as you are logged in as Rose, who is not a man. You may make it show again to further edit. Leave the edit mode now and switch the **Edit Mode** off.



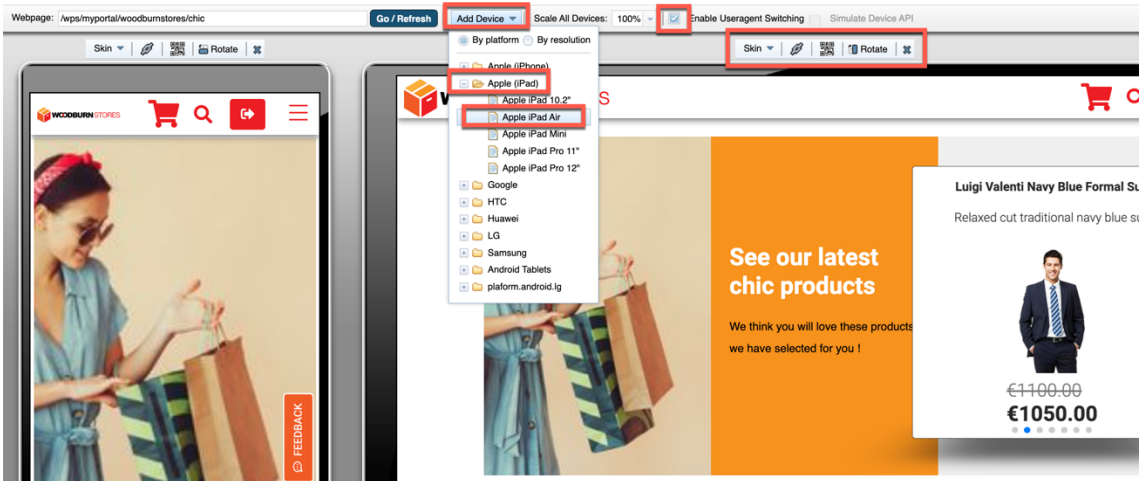
50. That looks great! Now try it out on different devices. Use the Mobile Browser Simulator. Click the icon. This works only for Chrome.



- Ensure you have checked the **Enable Useragent Switching**, as this is used to simulate your selected device. To enable it, install this on your Chrome browser: <https://chrome.google.com/webstore/detail/mobile-browser-simulator/dcljefehlpmoefgoohaobehbenocmkg>. Notice how it nicely adapts to a smartphone and hides the suits. You may also add a different device or use the QR code. To get access to the QR code, click . On your mobile scan the QR code and open the generated URL in your web browser, or just copy the URL from the Desktop.

Mobile Browser Simulator

The Mobile Browser Simulator displays mobile web pages in a variety of mobile browser sizes and shapes.



Congratulations! You have corrected the typo, added a new page with special chic products and men suits that only appear for men visiting the site and ensured it works on all devices, all easily with no help from IT.

Conclusion

By playing the role of two different Woodburn Stores customers, you have discovered how the Woodburn Stores site helps you to find the right products, motivates to become a loyalty member and really personalize your customer / buying experience. You also learned that the site can be managed by business users very easily with no support from IT, but under their control.

You also discovered other HCL Customer Experience portfolio solutions, enabling you to sell more using HCL Commerce, make online customer behaviors actionable with HCL Discover and take omni-channel marketing decisions using HCL Unica.

Resources

Refer to the following resources to learn more:

HCL Digital Experience Home - <https://hclsw.co/dx>

HCL Digital Experience on SoFy - <https://hclsofy.com/>

HCLSoftware U for DX - <https://hclsoftwareu.hcltechsw.com/hcl-dx>

HCL Software - <https://hclsw.co/software>

HCL Product Support - <https://hclsw.co/product-support>

HCL DX Product Documentation - <https://hclsw.co/dx-product-documentation>

HCL DX Support Q&A Forum - <https://hclsw.co/dx-support-forum>

HCL DX Video Playlist on YouTube - <https://hclsw.co/dx-video-playlist>

HCL DX Product Ideas - <https://hclsw.co/dx-ideas>

HCL DX Product Demos - <https://hclsw.co/dx-product-demo>

HCL DX Did You Know? Videos - <https://hclsw.co/dx-dyk-videos>

HCL DX GitHub - <https://github.com/hcl-dx>

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