

Sitecore Contact Facets & Personalization in use



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Addition⁺

Personalization ?

Altering the display of a website based on information we have about the visitor viewing the site:

- location
- their browsing behavior
- their accumulated profile values



Rules ?

- Sitecore uses Rules to define personalization situations
- If X condition is met perform action Y
- Based on evaluation of a rule we can change :
 - Data Source
 - Display Component
 - Component and data source together - different component



Contact Facets ?

- Starting with xDB an individual visitor is called a contact. Contact data is stored in "facets"
- A contact is an individual visitor that may be anonymous or he may have been authenticated. Either way, Sitecore allows you to persist data about the contact using contact facets
- When you use contact facets to store visitor data you are able to focus on what data you want to store.

Sitecore handles :

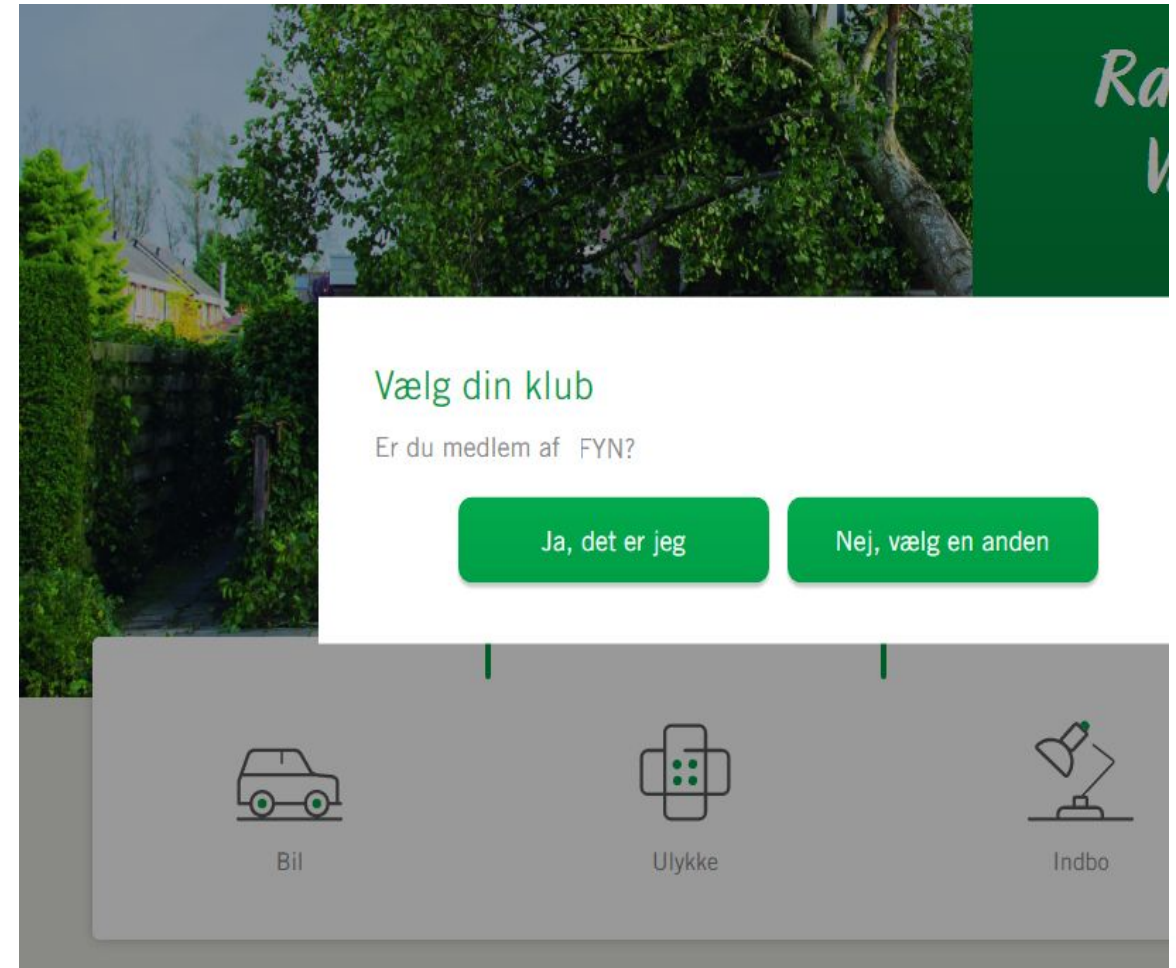
- writing the data to permanent storage,
- reading the data from permanent storage,
- making the data available when it is needed.
- if you want to extend the [contact](#) with your own custom, organization-specific data, then you can create custom [contact facets](#).



Case : Personalization using custom contact facets

Request ?

Based on visitor post number (Geo IP) and subsidiary office locations we need to suggest to the him corresponding club and show personalized content . If IP is not found or no connection between Ip and the post number we have in Sitecore we suggest the main office subsidiary



In Sitecore we had a big list with post numbers and its address relation to the office subsidiary:

A screenshot of a Sitecore form view titled 'Data'. It contains three input fields. The first field is labeled 'PostalCodeStart [shared]:' and contains the value '1000'. The second field is labeled 'PostalCodeEnd [shared]:' and contains the value '2000'. The third field is labeled 'ClubReference [shared]:' and contains the value 'Klubs/klub-148'.

```
var postalCode= Tracker.Current.Interaction.GeoData.PostalCode;
```



How?

Defining a Contact Facet

- Defining the Interface
- Implementing the Interface

```
public interface IVisitorData : IFacet
```

```
{  
    string ContactClub { get; set; }  
}
```

```
[Serializable]
```

```
public class VisitorData : Facet, IEmployeeData {
```

```
    private const string FIELD_VISITOR_IDC = "ContactClub";
```

```
    public Visitor()  
    {
```

```
        base.EnsureAttribute<string>(FIELD_VISITOR_IDC );  
    }
```

```
    public string ContactClub
```

```
{  
    get { return base.GetAttribute<string>(FIELD_VISITOR_IDC ); }  
    set { base.SetAttribute<string>(FIELD_VISITOR_IDC , value); }  
}  
}
```



Registering the Contact Facet

```
<configuration xmlns:patch="http://www.sitecore.net/xmlconfig/">
  <sitecore>
    <model>
      <elements>
        <element interface="Demo.ContactFacets.Model.IVisitorData ,
Demo.ContactFacets" implementation="Demo.ContactFacets.Model.VisitorData ,
Demo.ContactFacets" />
      </elements>
      <entities>
        <contact>
          <facets>
            <facet name="Contact Data" contract="Demo.ContactFacets.Model.IVisitorData,
Testing.ContactFacets" />
          </facets>
        </contact>
      </entities>
    </model>
  </sitecore>
</configuration>
```



Reading and Writing Contact Facet Data

```
<%@ Page Language="c#" %>
<%@ Import Namespace="Sitecore.Analytics" %>
<%@ Import Namespace="Testing.ContactFacets.Model" %>
<!DOCTYPE html>
<html>
  <head>
    <title>Add Visitor Club</title>
  </head>
  <body>
    <%
      var contact = Tracker.Current.Contact;
      var data = contact.GetFacet<IVisitorData>("Contact Data");
      data.ContactClub = "Klub123";
    %>
    <p>Visitor data contact facet updated.</p>
    <p>Contact ID: <b><%=contact.ContactId.ToString()%></b></p>
    <p>ClubID #: <b><%=data.ContactClub%></b></p>
  </body>
</html>
```



Output

Add Visitor Club

Contact ID: **3ecd616a-1733-4880-9417-60a55d1741a9**

ClubId #: "Klub123";



How do we Identify a Contact ?

By : a user login name, a user ID in a security system, an email address ...

When data is stored in xDB?

Sitecore only writes contact data to xDB when the session ends- performance reasons

```
// Identify:
```

```
Sitecore.Analytics.Tracker.Current.Session.Identify("");
```

```
//End Session Script :
```

```
Sitecore.Analytics.Tracker.Current.CurrentPage.Cancel(); Session.Abandon();
```



How data looks in Mongo?

The screenshot displays the MongoDB Compass interface. On the left, a sidebar shows the database structure with collections like 'System', 'AutomationRanges', 'AutomationStates', 'ClassificationsMap', 'Contacts', 'Devices', 'FormData', 'Geolps', 'HistoryRanges', 'HistoryTasks', 'Identifiers', 'Interactions', 'KeyBehaviorCache', 'Locations', 'OperationStatuses', 'Outcomes', 'RangeMaps', 'UserAgents', 'Functions', and 'Users'. The 'Contacts' collection is selected.

The main panel shows the 'Contacts' collection with a query bar containing `db.getCollection('Contacts').find({})`. Below the query bar, a table displays the document structure. The document is a JSON object with the following fields:

Key	Value
<code>_id</code>	<code>LUUID("e135bf8e-e629-d44c-b5c6-4656d596ece5")</code>
<code>Identifiers</code>	<code>{ 10 fields }</code>
<code>Personal</code>	<code>{ 2 fields }</code>
<code>Emails</code>	<code>{ 2 fields }</code>
<code>Entries</code>	<code>{ 2 fields }</code>
<code>test</code>	<code>{ 1 field }</code>
<code>personal</code>	<code>{ 1 field }</code>
<code>Preferences</code>	<code>{ 1 field }</code>
<code>Tags</code>	<code>{ 1 field }</code>
<code>Lease</code>	<code>null</code>
<code>System</code>	<code>{ 1 field }</code>
<code>TestCombinations</code>	<code>{ 1 field }</code>
<code>Contact Data</code>	<code>{ 3 fields }</code>
<code>ContactChoice</code>	<code>yes</code>
<code>ContactClub</code>	<code>klub-103</code>
<code>ContactName</code>	<code>GF Region & Kommune</code>



Custom Rules defined

Personalize the Component

Manage the personalization conditions for the content that is displayed.

☐ Enable personalization of component

ClubSelected

Condition

except where the club is selected

Default

If none of the other conditions are true

Rule Set Editor

Select the conditions and actions for your rule first. Then, specify the values in the Rule Description field.

Select the conditions for the rule:

when the current interaction is on a channel in the specified channel type

Clubs

where the club is selected

where the page is club alias

where the club id contains specific value

where the browser agent contains specific value

Date

when the date has passed

when the current day of the month compares to number

when the current day is day of the week

when the current month is month

Rule description (click an underlined value to edit it):

ClubSelected

except where the club is selected



An example rule

```
class ClubIsSelected<T> : StringOperatorCondition<T> where T : RuleContext
{
    1 reference | 0 changes | 0 authors, 0 changes
    public string Value { get; set; }
    2 references | 0 changes | 0 authors, 0 changes
    protected override bool Execute(T ruleContext)
    {
        Assert.ArgumentNotNull(ruleContext, "ruleContext");
        string str = this.Value ?? string.Empty;
        var contact = Sitecore.Analytics.Tracker.Current.Contact;
        if (!string.IsNullOrEmpty(AnalyticsHelper.GetContactClub(contact)))
        {
            return true;
        }
        return false;
    }
}
```



RESULT?

Mød os på kontoret



Christian Borgholdt
Boutrup
Kontoret i Odense,
Forsikringsrådgiver

Dan Sændergaard
Pedersen
Forsikringsrådgiver

Hanne Krogaard
Kontoret i Odense,
Forsikringsrådgiver

Lotte Wichmann
Læsgaard
Forsikringsrådgiver

Niels Jørgensen
Kontoret i Odense,
Forsikringsrådgiver

Knud Nielsen
Bestyrelsesformand

Claus Hanfarn
Foretningsfører

Jørgen Bremholm
Partner- og markedschef

Erling Hansen
Forsikringskonsulent

Seneste opslag fra Facebook

Vi har i GF Fyn - Overgade 34, 16x2 billetter til Håndbold kampen mellem HC Odense & Viborg HK den 12. April kl. 20.30 i Odense Idrætshal. Vi trækker lod om 16x2 billetterne Mandag kl. 12.00 blandt alle der har skrevet i

Læs mere på facebook

MIT GF

Din side
– dine forsikringer

Log ind på Mit GF

User A

Nøget ekstra for
vores kunder

Skaf nye kunder og få rabat


Se her
hvordan du får del i
overskuddet

Vil du også have del i
overskuddet?

Læs mere her

Forsikring for alle penge

Mød os på kontoret



Brigit Simonsen
Forsikringsrådgiver

Helle Buchhave
Forsikringsrådgiver

Martin Hæsegren
Forsikringsrådgiver

Niklas Dacht
Frederiksen

Bente Nielsen
Foretningsfører


Brian Thomsen
Exam. Assurandør

Patrick Vinter Nielsen
Direktør

Annette Aun
Admin. medarbejder

Kresten Kalkholm
Assurandør

Seneste opslag fra Facebook



MIT GF

Din side
– dine forsikringer

Log ind på Mit GF

User C





Questions?

Thank you

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<https://sitecoreares.wordpress.com>



Links

- https://doc.sitecore.net/sitecore_experience_platform/digital_marketing/personalization/walkthrough_personalizing_components#_Personalize_the_layout
- https://doc.sitecore.net/sitecore_experience_platform/digital_marketing/personalization/walkthrough_personalizing_components#_Personalize_the_layout
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