

Voyado - loyalty & CRM

Administration guide for Salesforce Commerce Cloud

Version 1.0.2

Table of Contents

Table of Contents	2
Overview	3
Functional Overview	3
1. Installation	4
1.1 Cartridge setup and activation	4
1.2 Import metadata	5
2. Configure Voyado Engage cartridge for SFCC	7
2.1 Voyado preferences	7
2.2 Web Service configuration	8
2.3 Job Configuration	9
3. Implementation considerations	13
3.1 Customer tracking	13
3.1.1 Tracking setup	13
3.1.2 Consent tracking	14
3.2 Using external CRM as master of record for customer data	14
3.3 Custom objects usage	15
4. User guide	17
4.1 Personalized promotion setup	17
4.2 Storefront modifications	19
4.2.1 Account Dashboard	19
4.2.2 Order history page	20
4.2.3 Profile Edit page	20
4.2.3 Loyalty info page	21
4.2.4 Shopping cart modifications	22

Overview

The Voyado for SFCC (Salesforce Commerce Cloud) link cartridge integrates the features of Voyado Engage platform with SFCC storefront

Voyado for SFCC link cartridge highlights:

- customer identification
- bidirectional customer data synchronization
- promotion synchronization
- customer behavior tracking
- abandoned cart tracing
- purchase emails
- guest purchase data synchronization

Functional Overview

The Voyado SFCC link cartridge provides the following functionality:

- Multi-market support - completed
- Contacts:
 - identifying contacts - completed
 - creating contacts - completed
 - contact data synchronization - completed
 - contact upgrade - completed
 - soft login - completed
- Receipts/shipments/refunds
 - export receipts to Voyado - pending
 - export refund data to Voyado - pending
- Personal discounts
 - discount setup and configuration - completed
 - discount redemption - completed
- Reward vouchers
 - import voucher data - pending
 - redeem vouchers - pending
- Transactional emails
 - trigger purchase emails - completed
 - trigger shipment emails - pending
- Customer tracking
 - product view tracking - completed
 - abandoned cart tracking - completed
 - abandoned cart recovery - completed

In addition to this, cartridge enriches the data shown in the Customer area pages, primarily:

- Account dashboard
- Purchase history page
- Loyalty info page - (new)

Detailed functional specification can be found in the Functional requirements document.

1. Installation

1.1 Cartridge setup and activation

The Voyado SFCC link cartridge was built based on the latest SFCC SFRA architecture. Link cartridge does not support storefronts built using legacy SFCC versions (SGJC or Pipelines).

The plugin repository contains two dedicated SFCC cartridges, **int_voyado** and **int_voyado_sfra**. The first one contains common integration functionality. e.g. web-service implementation, jobs, utility scripts... The second one, contains updates to SFRA components, necessary for the cartridge to work properly in the SFRA based storefront. e.g controller prepend/append implementations, client side JS override... In addition to this the cartridge contains site template based data import files, that create necessary extensions of the SFCC system object as well as definition of custom objects used by the cartridge.

To install the Voyado link cartridge for SFCC on your instance:

1. Download and install the cartridge
 - a. Download or clone the cartridge repo from Github.
 - b. Copy the **int_voyado** and **int_voyado_sfra** from the cartridges folder to your repository.
 - c. Upload the cartridge to your active code version on the instance
2. Add cartridges to the respective site path in the Business Manager
 - a. In Business Manager, navigate to, **Administration > Manage Sites**
 - b. Click on the link to manage the Business Manager site and go to Settings tab
 - c. Add **int_voyado** and **int_voyado_sfra** cartridges to the site path in the following order: **int_voyado_sfra -> int_voyado_sfra -> app_storefrontng_base**
 - d. Click Apply to save the changes

Sandbox - zzij

Select a Site Merchant Tools Administration Storefront Toolkit

Code Versions Cartridge Path Search with ease...





Administration > Sites > Manage Sites

Storefront Sites

The list shows all Storefront sites defined in this organization.

Click **New** to create a new site. Click **Delete** to delete an existing site and all its content.

Click the site name to edit the site settings. Use the **Up** and **Down** buttons to define the order in which sites appear throughout the Business Manager.

Select All	Name	ID	Status	Sorting
<input type="checkbox"/>	RefArch	RefArch	Online	 
<input type="checkbox"/>	RefArchGlobal	RefArchGlobal	Online	 

Refresh New Delete

RefArch - Settings

Click **Apply** to save the details. Click **Reset** to revert to the last saved state.

Instance Type: Sandbox/Development

Deprecated. The preferred way of configuring HTTP and HTTPS hostnames is by using new features of the site aliases configuration ("SEO > Aliases Configuration"). The HTTP/HTTPS hostname values set in this section will be used if no hostnames are defined by aliases configuration and are intended only to support an older configuration style.

HTTP Hostname:

HTTPS Hostname:

Instance Type: All

Cartridges: int_voyado_engage_sfra:int_voyado_engage:app_storefront_base

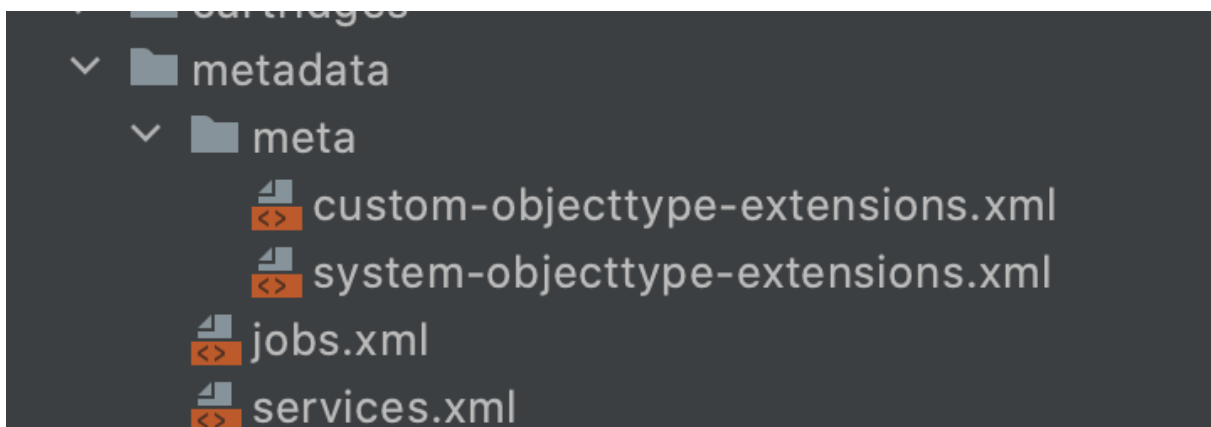
Effective Cartridge Path:

- int_voyado_engage_sfra
- int_voyado_engage
- app_storefront_base
- plugin_apple_pay
- plugin_facebook
- plugin_payments
- plugin_pinterest_commerce
- plugin_web_payments
- bc_content
- core

Apply **Reset**

1.2 Import metadata

Voaydo link cartridge metadata folder contains the following files used to add new configuration items.



The metadata folder contains:

- *metadata/site-template/meta/custom-objecttype-extensions.xml* - custom object definition
- *metadata/site-template/meta/system-objecttype-extensions.xml* - system objects extensions

- *metadata/site-template/jobs.xml* - jobs definitions. Please note that you will need to update the **site-id** in the import file to match the sites on your SFCC instance. The import file references the RefArch sample site
- *metadata/site-template/services.xml* - web-service definitions
- *metadata/site-template/sites/RefArch/preferences.xml* - contains sample configuration for the default RefArch site.

To import the cartridge metadata:

1. zip the updated site-template folder
2. In Business Manager navigate to: **System > Administration > Site Import & Export**
3. Click the **Choose File** button in the import file section and upload the **site-template.zip** file
4. Select the radio button next to the imported file and click **Import**
5. Confirm the import by clicking the **OK** button in the dialog box

Administration > Site Development > Site Import & Export

Site Import & Export

This page allows you to export the current configuration of your organization including all of its sites. To download an archive, just click its file name.

Import

Are you sure that you want to import the selected archive? OK Cancel

Upload Archive:
☒ Local ☐ Remote

Choose File No file chosen Upload

Select	Name ▲	Location	File Size	Last Modified
<input type="radio"/>	export_8_10_site_images.zip	global	11.92 MB	8/10/20 5:15:26 am
<input checked="" type="radio"/>	metadata.zip	local	7.08 KB	10/28/20 11:36:34 am
<input type="radio"/>	SiteGenesis Demo Site			
<input type="radio"/>	Storefront Reference Architecture Demo Sites			

Import Delete

Export

You will receive the confirmation email once the import process completes.

2. Configure Voyado Engage cartridge for SFCC

The following section provides information about required configuration necessary for the Voyado Engage cartridge to work properly.

2.1 Voyado preferences

Voyado preferences are custom site preferences that hold necessary cartridge configurations. They are divided into three separate groups based on the aspect of the integration/functionality that they are controlling:

- Voyado - holds global cartridge configuration (integration params, controls if specific aspect is enabled/disabled)
- Voyado Tracking - holds configuration that controls the customer tracking in the storefront
- Voyado Loyalty info - holds configuration that is related to the Voyado data presentation in the storefront

ID	Name	Description	Preferences	View Across Sites
Storefront Configs	Storefront Configurations		5	View
Voyado	Voyado		11	View
Voyado Tracking	Voyado Tracking		5	View
Voyado Loyalty Info	Voyado Loyalty Data		6	View

To set the Voyado configuration parameters:

1. In BM, navigate to: **Merchant tools > Site Preferences > Custom preferences**
2. Click on the View Link or the preference group ID to configure each preference group
3. Click on **Voyado** cartridge preferences link to configure:
 - a. **Is Voyado Enabled?** - *yes/no* - Setting this to no disables the SFCC - Voyado integration completely.
 - b. **Voyado Store ID** - *string* - Default store id in Voyado that customers registered on the website will be assigned to.
 - c. **Voyado Country Store ID** - *text* - Allows merchants to specify a country specific store id, in case of multi-country sites in SFCC. The field takes a JSON object that has key-value pairs formatted to "ISO-2 country code" : "store-id in Voyado". In case the country is not defined in the JSON object, integration will use the default value stored in the **Voyado Store ID** field.

JavaScript

```
{
  "GB": "ecom-denmark",
  "SE": "ecom-denmark",
  "US": "ecom-new-york"
}
```

- d. **Secret key for soft-login** - `string` - Secret key used to decrypt data in soft-login links. Your Voyado representative will provide this during the soft-login setup process.
 - e. **Update/create contact data in Voyado from SFCC?** - `yes/no` - enables/disables contact data sync between SFCC and Voyado. In case this value is set to no, SFCC will expect that a 3rd party system(CRM, ServiceCloud...) will be in charge of creating and updating contact data from SFCC to Voyado. This will be covered in one of the sections further in the document.
 - f. **Enable Guest Contacts** - `yes/no` - Enables/disables guest user data sync from SFCC to Voyado
 - g. **Guest Contact Type** - `enum - member | contact` - In case the guest flow is enabled, the contact in Voyado will be created as Member or a Contact depending on the selected option
 - h. **Promote Contact To Member?** - `yes/no` - determines if the contact already registered as Contact in Voyado should be updated to a Member when creating an account in SFCC
 - i. **Use Voyado Confirmation Email?** - `yes/no` - replaces standard SFCC with an email triggered from Voyado
 - j. **Enable Triggering Support Email** - `yes/no` - triggers support email in case of an error occurs while during web-service execution
 - k. **Voyado Support Email** - `string` - email recipient for the above configuration
4. Click on **Voyado Tracking** cartridge preferences link to configure:
- a. **Voyado Enable Tracking** - `yes/no` - enables customer tracking in the storefront
 - b. **Voyado Enable Abandoned Cart** - `yes/no` - enables abandoned cart tracking
 - c. **Voyado Enable Product View Tracking** - `yes/no` - enables product view tracking in the storefront
 - d. **Voyado Tracking Script Path** - `string` - absolute url of the Voyado tracking library script
 - e. **Voyado Tenant ID** - `string` - tennant ID param used for tracking in the storefront. This will be provided by your Voyado representative, during the tracking process onboarding.
5. Click on **Voyado Loyalty info** cartridge preferences link to configure:
- a. **Voyado Show Promo In Cart** - `yes/no` - displays customer specific Voyado active promotions in the shopping cart page
 - b. **Voyado Show Promo To Guests** - `yes/no` - displays customer specific Voyado active promotions in the shopping cart page to Voyado identified customers that have not logged in yet.
 - c. **Voyado Show Status Dashboard** - `yes/no` - show loyalty data overview in the Account dashboard page.
 - d. **Voyado Show Promo Products** - `yes/no` - displays product affected by Voyado promotions in the loyalty information page
 - e. **Show Offline Orders** - `yes/no` - shows orders placed in other channels (brick & mortar stores) linked to the contact in Voyado. This assumes that the data is already available in Voyado, synced via 3rd party integration.
 - f. **Show Order Earned Points** - `yes/no` - displays the amount of reward points earned with each order. (phase 2)

2.2 Web Service configuration

Importing site template data will automatically create necessary web-services in the instance, however, BM user will have to tweak the web-service configuration to ensure that services are using the correct endpoints.

[Administration](#) > [Operations](#) > [Services](#)

Services Profiles Credentials

Services

Select All	Name	Type	Profile	Credentials	Status
<input type="checkbox"/>	VoyadoContact	HTTP	Voyado	VoyadoContact	Live
<input type="checkbox"/>	VoyadoContactOverview	HTTP	Voyado	VoyadoContactOverview	Live
<input type="checkbox"/>	VoyadoOrders	HTTP	Voyado	VoyadoOrders	Live
<input type="checkbox"/>	VoyadoPromotions	HTTP	Voyado	VoyadoRedeemPromotion	Live
<input type="checkbox"/>	VoyadoReceipt	HTTP	Voyado	VoyadoReceipt	Live

[New](#) [Delete](#)

1. In Business Manager navigate to: **Administration > Operations > Services**
2. Click on **Credentials** link to access the service credentials configuration
3. Modify the endpoints for each of the imported service credentials
 - a. **VoyadoContact**
 - b. **VoyadoContactOverview**
 - c. **VoyadoOrders**
 - d. **VoyadoReceipt**
 - e. **VoyadoPromotions**
4. Click the credential id to update the specified credentials
5. On the credentials page:
 - a. replace the domain part of the url with your instance domain
 - b. in the password field enter the Voyado API Key
6. Hit **Save**
7. Repeat steps 4-6 for other service credentials.

[Administration](#) > [Operations](#) > [Services](#) > [Service Credentials](#)

Services Profiles **Credentials**

Service Credentials

Select All	Name	URL	User
<input type="checkbox"/>	VoyadoContact	https://impactcommerce.staging.voyado.com/api/v2/contacts	
<input type="checkbox"/>	VoyadoContactOverview	https://impactcommerce.staging.voyado.com/api/v2/contactoverview/	
<input type="checkbox"/>	VoyadoOrders	https://impactcommerce.staging.voyado.com/api/v2/orders	
<input type="checkbox"/>	VoyadoReceipt	https://impactcommerce.staging.voyado.com/api/v2/receipts	
<input type="checkbox"/>	VoyadoRedeemPromotion	https://impactcommerce.staging.voyado.com/api/v2/promotions	

[New](#) [Delete](#)

Notes:

- Voyado web-service credentials are configured during the metadata import. The IDs of the web-services must not be modified as they are referenced in the implementation
- Voyado API Key, used for the web-service authentication will be provided to you by your Voyado representative during the Voyado account configuration.

2.3 Job Configuration

Voyado link cartridge for SFCC uses the SFCC job framework to send certain information from SFCC to Voyado. Sample job configuration is pre-configured in the site-template, and will be imported

automatically with other meta-data. Job steps are already configured, however the BM user will still need to tweak the job schedule as well as the site assignment of the job steps to have everything working properly.

Voyado link cartridge for SFCC uses two separate jobs to send data from SFCC to Voyado. You can access the jobs in Business Manager by navigating to **Administration > Operations > Jobs**:

- Voyado - Redeem Promotions - in charge of redeeming used customer promotions
- Voyado - Process Receipts - in charge of sending guest user data to voyado.

To modify a specific job schedule click on the job ID to access the specific job configuration. Once on the job page, you can modify the job schedule through the **Schedule and History** tab.

[Administration](#) / [Operations](#) / **Jobs** [?](#) [New Job](#)

[Find](#)

[Enable](#) [Disable](#) [Run](#) [Delete](#) [Refresh](#)

Scheduling Of Custom Jobs Disabled
Automatic time-based execution (scheduling) of custom jobs is disabled.

<input type="checkbox"/>	ID ▲	Status	Last Run	Execution Scope	Resources	Priority	Enabled	Delete
<input type="checkbox"/>	RebuildURLs	-		2	-		⊘	
<input type="checkbox"/>	Reindex	-		2	-		⊘	
<input type="checkbox"/>	Voyado - Process Receipts	OK	4/3/2023 8:18:58 am	RefArch	-		⊘	
<input type="checkbox"/>	Voyado - Redeem Promotions	-		RefArch	-		⊘	

Administration / Operations / Jobs /

Voyado - Process Receipts ?

Run Now

General Schedule and History Resources Job Steps Failure Handling Notification

Scheduling Of Custom Jobs Disabled

Automatic time-based execution (scheduling) of this custom job is disabled.

☒ Enabled

Active

Trigger

Recurring Interval

From*

To

4/3/2023 6:36:00

Run Time

Every

Amount*

Interval*

10

Minutes

Run Only On These Days:

☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☒ Sunday

You can modify the job notification setting to trigger notifications in case an error is generated during the job execution. To do this, access the **Notification** tab on the job configuration page. Here you can enable notifications and specify recipients for each job exit status.

Administration / Operations / Jobs /

Voyado - Process Receipts ?

Run Now

General Schedule and History Resources Job Steps Failure Handling Notification

☐ Enabled

Select Events to Receive Notifications About:

☐ Ok
 ☒ Error
 ☒ Long Runtime
 ☐ Retry

From*

test-sender@organization.com

CC

To*

test-receipient@organization.com, example2@email.con

BCC

Long Runtime Detection

☒ Enabled

Runtime:*

30

Minutes

To send notifications to multiple recipients, enter the email address in the field separated by comma. You need to configure the schedule and the notification for each job separately.

Notes:

- *Voyado - Process Receipts* job will be extended in phase 2 to send purchase data from SFCC to Voyado

3. Implementation considerations

3.1 Customer tracking

Although no base cartridge modification is required to enable customer tracking in the cartridge the following points need to be considered when implementing the customer tracking.

3.1.1 Tracking setup

Tracking script is implemented using velocity templates and SFCC hooks. OOTB SFCC layout templates make a hook call

For example, `templates/default/common/layout/page.isml` layout template implements a hook call:

```
JavaScript
<body>
    ${dw.system.HookMgr.callHook('app.template.beforeHeader',
    'beforeHeader', pdict) || ''}
    ...
    ...
    ...
</body>
```

Cartridge implements this hook, and using a velocity template outputs the tracking configuration into the page. `int_voyado_engage_sfra/cartridge/scripts/hooks/voyado/trackingInit.js` reads site preferences and outputs them as global Javascript variables on every page where the hook is initiated:

```
JavaScript
const trackingVars = '<!-- VoyadoTracking Variables -->'
+ '<script>'
+ 'window.VOYADO_TRACKING = $trackingEnabled; \n'
+ 'window.VOYADO_TRACK_PRODUCT_VIEW = $productTrackingEnabled; \n'
+ 'window.VOYADO_TRACK_ABANDONED_CART = $cartTrackingEnabled; \n'
+ 'window.VOYADO_GET_CONTACT_URL = \'$getContactUrl\'; \n'
+ 'window.VOYADO_GET_CART_URL = \'$getCartUrl\'; \n'
+ '</script>'
+ '<!-- End VoyadoTracking Variables -->';

velocity.render(trackingVars, {
    trackingEnabled: trackingEnabled,
    productTrackingEnabled: productTrackingEnabled,
    cartTrackingEnabled: cartTrackingEnabled,
    getContactUrl: getContactUrl,
    getCartUrl: getCartUrl
});
```

These variables are then used to determine if the customer action in the storefront should be tracked.

The same hook is used in other two layout files:

- templates/default/common/layout/checkout.isml
- templates/default/common/layout/pdStorePage.isml

In case the tracking is enabled, SFCC will track the customer behavior in the storefront asynchronously from the other user action. This is achieved by making an AJAX call to a new controller to check if the customer in session has been identified as a Voyado Contact. This way it's possible to cache the tracking logic but still properly identify different customers without impacting page load times.

3.1.2 Consent tracking

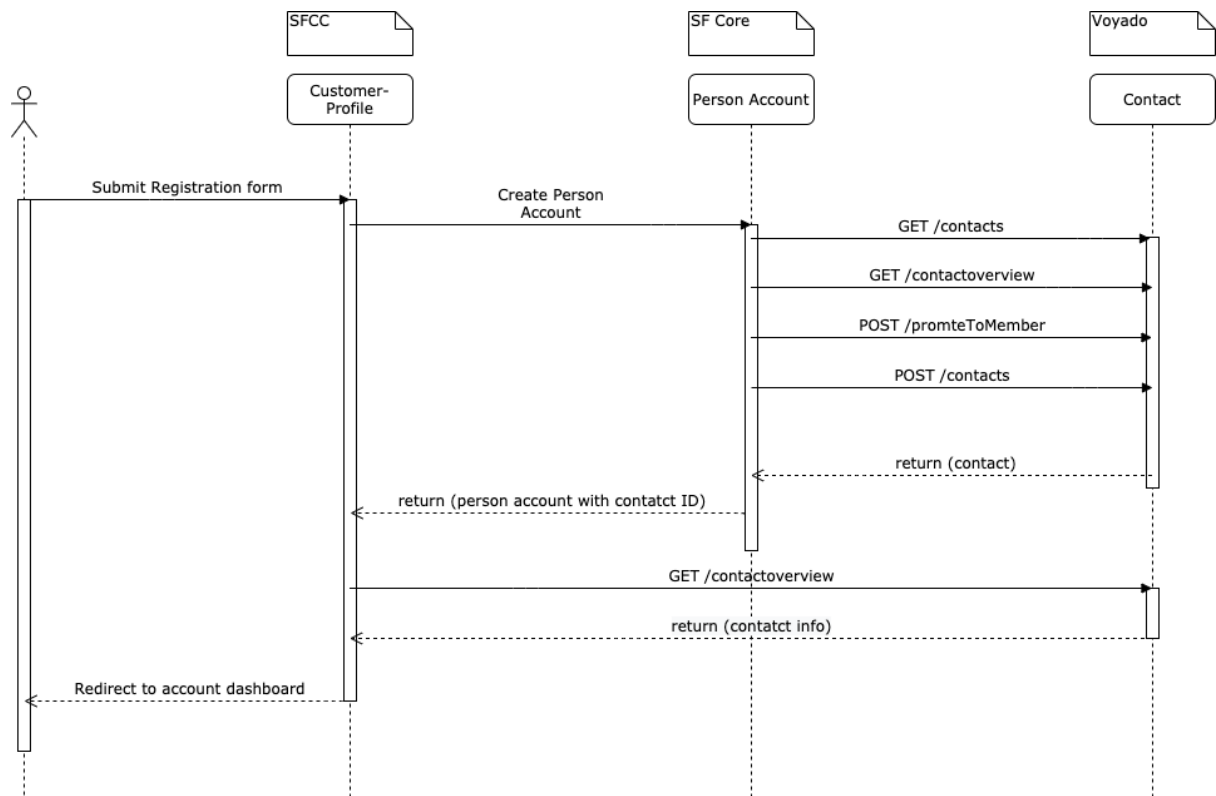
In addition to enabling the tracking through configuration in site preferences, customers also need to accept the consent tracking in SFCC before the cartridge starts sending the data to Voyado. This is implemented by checking the value of `dw_dnt` cookie. The value of `dw_dnt` cookie is true by default, and it only changes to false once a customer accepts the OOTB cookie tracking in SFCC. So before sending any data, SFCC checks if the value of `dw_dnt` cookie is false before sending data to Voyado.

3.2 Using external CRM as master of record for customer data

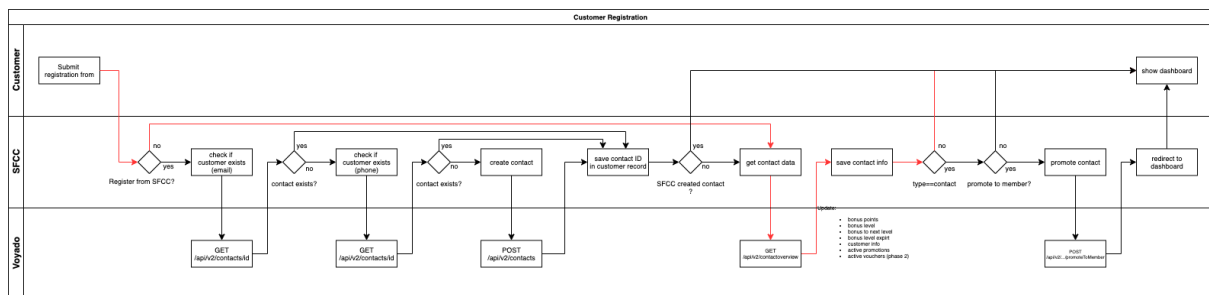
As mentioned briefly above, in the site preferences section, the cartridge has support for the use case in which an external CRM is used as master of record for all customer information. In this setup, it's important to mention that SFCC expects that all customer related data import and export will be performed by the external system. SFCC will also assume that all information necessary for the cartridge functioning will be populated by an external integration. This includes Voyado customer specific attributes populated during account creation in SFCC.

The screenshot displays a customer profile page for Voyado. The fields are organized into sections: Contact Information (Contact ID, Contact Number, Social Security Number), Current Coupons (with an 'Add Another Value' link), Bonus Level (Gold), Accumulated points (146), Remaining points to level upgrade, Points expiry (2024-01-19T00:00:00+01:00), Current Promotions (listing three active promotions with their IDs, titles, and expiration dates), Preferences (a dropdown menu showing 'None', 'acceptsEmail (Accept Email)', 'acceptsSms (Accept SMS)', and 'acceptsPostal (Accept Mail)'), and Consents (a dropdown menu showing 'None', 'social (Social)', 'terms (Terms and Conditions)', 'mail (Mail)', and 'remarketing (Remarketing)').

For example: when creating an account in SFCC will first perform a lookup, trying to match an existing customer to a voyado contact by querying Voyado for registered contact using the email address or the phone number entered in the registration form. In case the query returns a matching Voyado contact, SFCC will link the customer account to the voyado contact by setting the value of `externalCustomerId` custom attribute to the ID of the contact in Voyado. SFCC may also attempt to promote the customer if the flow is enabled. And if a matching contact is not found, SFCC will attempt to create a new contact in Voyado. With the external CRM flow enabled, SFCC will assume that this logic is already implemented in the CRM, and it will expect that this data comes from the integration with the CRM system.



SFCC will still fetch loyalty related data from Voyado each time a customer logs in. This also includes promotion related information, and voucher related data (in phase 2).



3.3 Custom objects usage

SFCC uses a job framework to send specific information to Voyado asynchronously to minimize the impact a 3rd party integration could have on the standard purchasing process. For example, in the promotion redeem flow, once the order is placed, SFCC checks if a Voyado related promotion has been applied, and creates an instance of a custom object with a link to the specific promotion used in the order. The job in charge of the promotion redeem process picks up the unprocessed custom objects and executes an appropriate API call that redeems a specific promotion. As the process as a whole is asynchronous, to ensure that the customer cannot redeem the same promo twice, SFCC also removes the redeemed promotion from session and customer account data. The process of creating a custom object instance is implemented as an **append** action of the `Order-Confirm` controller in SFCC which is in charge of showing the order confirmation page to the customer.

In some cases merchants may use payment methods such as Adyen, where the final payment confirmation comes through an asynchronous web-hook. In this case, the payment may be canceled even after the customer hits the Place Order button in the checkout.

To handle this, the SI in charge of the implementation would have to copy/move the code in charge of creating custom objects to the appropriate process that handles the final payment confirmation.

JavaScript

```
const voyadoHelper =
require('*/cartridge/scripts/helpers/voyadoHelper');

    if (voyadoHelper.isCartridgeEnabled()) {
        const order = OrderMgr.getOrder(req.form.orderID,
req.form.orderToken);
        voyadoHelper.processOrderPromotions(order);
        voyadoHelper.processAnonymousOrders(order);
    }
```

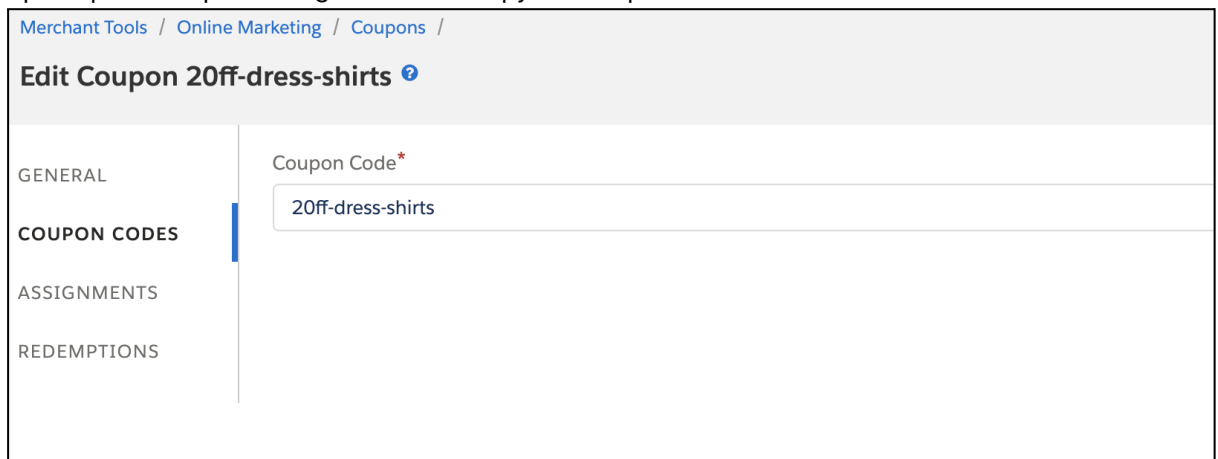
Similar approach can be applied in case merchants use 3rd party fraud check tools, such as Riskified or Signifyd.

4. User guide

4.1 Personalized promotion setup

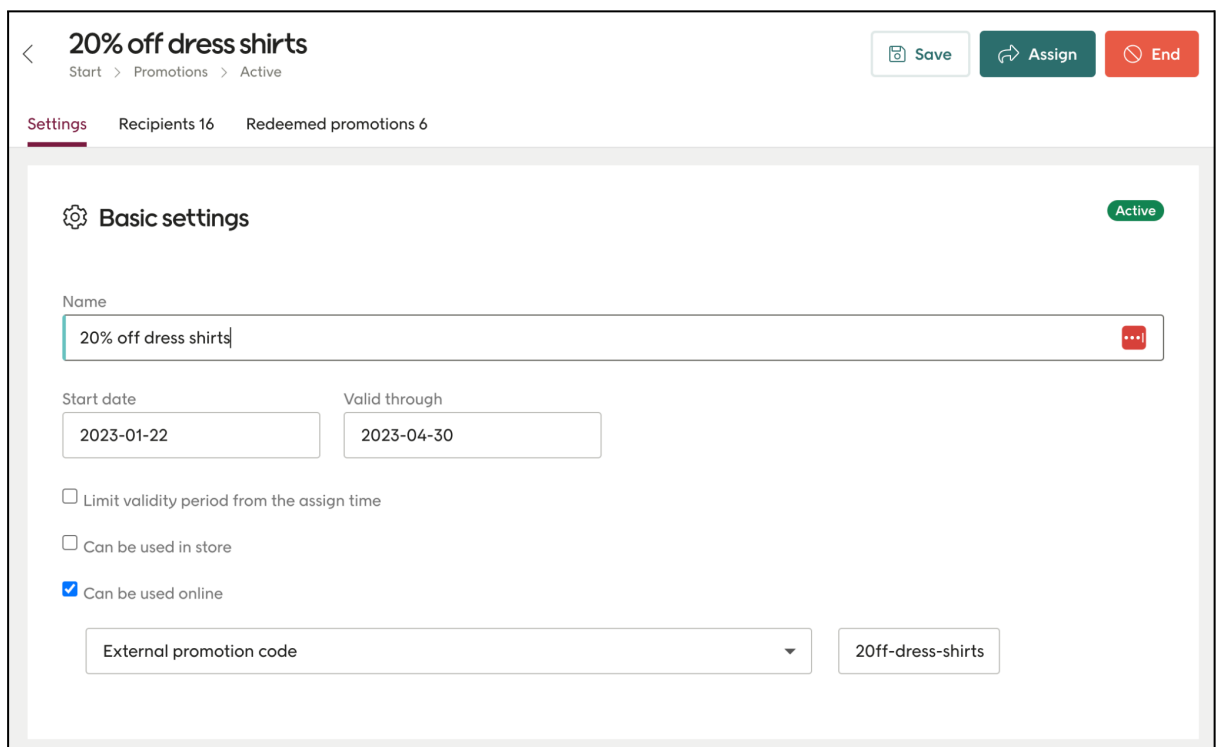
Personalized promotions utilize both systems to configure and distribute promotions to the contacts registered in the system. The process utilizes SFCC promotion engine and Voyado advanced segmenting capabilities to distribute promotions to the appropriate target audience. In order to achieve this, the Coupon Code in SFCC needs to match the coupon code.

1. In Business Manager navigate to: **Merchant Tools > Online Marketing > Coupons**
2. Open up the coupon configuration and copy the coupon code



The screenshot shows the 'Edit Coupon 20ff-dress-shirts' page in the SFCC interface. The breadcrumb trail at the top is 'Merchant Tools / Online Marketing / Coupons /'. The page title is 'Edit Coupon 20ff-dress-shirts' with a help icon. On the left, there is a sidebar with tabs: 'GENERAL', 'COUPON CODES' (which is selected and highlighted with a blue bar), 'ASSIGNMENTS', and 'REDEMPTIONS'. In the main content area, under the 'COUPON CODES' tab, there is a 'Coupon Code*' field containing the text '20ff-dress-shirts'.

3. Open the promotion configuration in Voyado.
4. Copy the coupon code from SFCC to the External Promotion Code field in the Basic Settings tab



The screenshot shows the '20% off dress shirts' promotion configuration page in the Voyado interface. The breadcrumb trail is 'Start > Promotions > Active'. At the top right, there are three buttons: 'Save' (with a floppy disk icon), 'Assign' (with a share icon), and 'End' (with a stop icon). Below the breadcrumb, there are three tabs: 'Settings' (which is selected and highlighted with a red underline), 'Recipients 16', and 'Redeemed promotions 6'. The 'Basic settings' section is active, indicated by a green 'Active' badge. It contains a 'Name' field with the text '20% off dress shirts' and a red 'x' icon. Below this are two date fields: 'Start date' with the value '2023-01-22' and 'Valid through' with the value '2023-04-30'. There are three checkboxes: 'Limit validity period from the assign time' (unchecked), 'Can be used in store' (unchecked), and 'Can be used online' (checked). At the bottom, there is an 'External promotion code' dropdown menu and a text field containing '20ff-dress-shirts'.

5. Click **Save**

SFCC will only show promotion in the cart page, in case it has been marked as Voyado promotion. To do this, in BM:

1. Navigate to **Merchant Tools -> Online Marketing -> Promotions**
2. Select the promotion by clicking the promotion id in the list
3. Tick the **Is Voyado Promotion?** checkbox in the Voyado attribute section.

20ff-dress-shirts-1

Status: Active Promotion Class: Product Promotion Rule: 20% on discounted products if qualifying product amount >= \$1.00

General

You can manage general and custom promotion attributes in this section. The **Status** field indicates if the promotion is active or inactive (to be active, a promotion must be both scheduled and enabled). The **Name** field provides slightly more detailed message (typically used on a product detail page). The **Promotion Details** field is generally used for legal messaging, fine print, and other details about the promotion. To schedule or modify promotion quickly, you must do this from within the specific campaign or A/B test. You can see where the promotion is scheduled in the **Schedule/Qualifiers/Compatibility** section. Click the **Apply** button at the bottom of each panel ("General").

Select Language: Default Apply

ID: 20ff-dress-shirts

Name: 20% off Dress Shirts

Currency: All

Enabled: Yes

Archived: No

Searchable: No

Callout Message: 20% off Dress Shirts

HTML Editor

Promotion Details: 20% off Dress Shirts

HTML Editor

Tags:

Add New Tag: Add

Image:

Compatibility

To control this promotion's interaction with other promotions, configure compatibility settings.

To control how this promotion generally combines with other promotions, set the **Exclusivity**. This general exclusivity rule can be overridden by combinable and mutually exclusive promotions. Adding promotions to **Exclusivity Groups** streamlines the compatibility settings process. You can assign individual promotions or entire groups as **Combinable Promotions** or **Mutually Exclusive Promotions**. Check the spelling of the group, there is no change in behavior.

Exclusivity: NO (Can be combined with any promotion.)

Exclusivity Group:

Combinable Promotions:

Add Another Value

Mutually Exclusive Promotions:

Add Another Value

Voyado

Is Voyado Promotion? ☒

In order to show the products associated with the assigned promotions, the promotion ID should match the coupon code used to activate the promotion.

As a final step, in the campaign configuration, set the coupon code as one of the required promotion qualifiers.

Notes:

- In case the promotion name in SFCC does not match the coupon code, the promotion will still work, however SFCC will not show products associated with the promotion in the Loyalty info page in the Account section.
- Typically, the promotions configured will apply to logged in users. To achieve this campaign that activates the promotion would be segmented to be applied to registered users only.

Scheduling & Qualifiers

Start Date:

02/01/2023

12:00 AM

☐ No Start Date

End Date:

☒ No End Date

Customer Groups:

(1) Registered

Edit

Source Codes:

(0)

Edit

Coupons:

(1) 20ff-dress-shirts

Edit

Experiences

Add Experience

Slot Configurations (0 Experiences)

Promotions (1 Experience)

ID	Schedule	Customer Groups	Source Codes	Coupons	Required Q...	Rank	Exclusi...	En...
20ff-dress-shirts-1	02/01/2023 - Continuously	Registered		20ff-dress-shirts	All	10	NO	Yes

Sorting Rules (0 Experiences)

Keyword Search Sorting Rules (0 Experiences)

Cancel

Apply

4.2 Storefront modifications

As mentioned above, the cartridge modifies some of the OOTB SFRA pages and introduces new pages in charge of displaying the appropriate information to customers.

1. Account section modification
2. Shopping cart modifications

Account section modifications are primarily related to displaying the appropriate loyalty information to customers. Cartridge updates the content in three pages and adds a new page to the customer account area.

4.2.1 Account Dashboard

The Account Dashboard page has been extended to include a loyalty data summary

Password

Edit

Password

Address Book

View

Default Address

123 Test Street - New York - 10003

Milan Test Karapandzic Test2

123 Test Street

New York, NY 10003

+13125550000

Add New

Payment

View

Credit Visa

*****1111

Ending 3/2027

Add New

Loyalty

View More

Bonus points

146

Bonus level

Gold

View Active Promotions

Loyalty summary includes:

- current bonus points balance
- current bonus points level
- links that navigate customers to the Loyalty info page

4.2.2 Order history page

Order History page has been extended to include an offline purchase history section

Offline Orders	
Order No. 468464468	
Date Ordered: 1/19/23 Store Name: Brick and mortar	
Total items 1	Total EUR 75.00
Order No. 468464468	
Date Ordered: 1/19/23 Store Name: Brick and mortar	
Total items 1	Total EUR 75.00
Back to My Account	

Each offline order in this section shows:

- order number as entered in the store
- order date
- store name where the purchase was made
- total number of items
- order total

4.2.3 Profile Edit page

Profile edit page has been extended to include additional fields used to manage customer communication preferences.

Each of the communication preferences is represented by a checkbox in the profile edit page. The data for the checkboxes is taken from the custom created attribute **voyadoPreferences**

Edit Profile

* First Name

Milan Test

* Last Name

Karapandzic Test2

* Phone

+13125550000

* Email

milan@improove.se

* Confirm Email

* Password

☒ Accept Email

☒ Accept SMS

☒ Accept Mail

[Consent to Track](#)

Cancel

Save

4.2.3 Loyalty info page

Loyalty info is a new page created to show details about the customer loyalty data and personalized promotions.

The page shows the following information:

- Bonus points balance
- Bonus level
- Level expiry date (if configured)
- Points remaining to upgrade
- List of personalized promotions
- List of products affected by the promotion

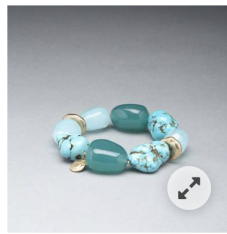
Loyalty

Bonus points	146
Bonus level	Gold
Level expires	Jan 18, 2024
Points needed for level upgrade	
Active promotions	Voyado - Buy 5 get 50% off 20% off dress shirts - Voyado title 20% off your next purchase - Presentation Title

Promotions



Playstation 3 Bundle
\$449
★★★★☆



Turquoise Jewelry Bundle
\$113
★★★★★



Garmin nuvi® 750
Portable GPS Unit
\$312

Notes:

- All of the content updates are controlled by the specific site preference. This is explained in the cartridge configuration section of this document.
- Customers may have multiple instances of the same promotion assigned in Voyado. SFCC will filter eligible promotions based on the promotion identifier in Voyado and only show unique promotions sorted by the expiry date

4.2.4 Shopping cart modifications

Shopping cart page has been extended to include the promotion section below the main cart area. The promo section contains:

- Promotion name
- CTA button that customers need to click to benefit from the promotion

Your Cart

[Continue Shopping](#)

1 Items

Need Help? Call [1-800-555-0199](#)

Modern Dress Shirt



color: Blue

size: 16L

In Stock

[Edit](#)

Each

\$135

Quantity

1

Total

\$135.00

X

20% off dress shirts - [Voyado title Apply](#)

20% off your next purchase - [Presentation Title Apply](#)

Enter Promo Code

Submit

Shipping

Ground (7-10 Business Days)

Shipping cost

\$7.99

Sales Tax

\$7.15

Estimated Total

\$150.14

Checkout

- Cart will only show promotions marked as **Voyado promotions**