ExpertVoice Order Reporter for Salesforce Commerce Cloud

Introduction

The ExpertVoice Order Reporter tracks conversions from your ExpertVoice Product Seeding Campaigns (a.k.a. Redirect Stores), to help ensure billing accuracy. Additionally, the app will pass back product details, to allow reporting on what products ExpertVoice experts are purchasing. There is no Personal Identifiable Information (PII) accessed with this app. ExpertVoice is only storing order data that contains a discount code that matches a code assigned to an expert on ExpertVoice.

Installation

To install the ExpertVoice Order Reporter cartridge, follow these steps:

Uploading the Metadata

1. In the Salesforce Commerce Cloud Business Manager, navigate to **Administration > Site Development > Site Import & Export**.
2. Click the "Choose File" button.
3. In the file explorer, locate the `metadata.zip` file provided by the ExpertVoice team.
4. Select the `metadata.zip` file and click "Open" or "Upload".
5. Once the file has been selected, click the "Import" button to begin the import process.
6. Wait for the import to complete successfully.

Adding the Cartridge to the Cartridge Path

You'll need to add the `expertvoice_orderreporter` cartridge to the cartridge path of your Storefront and your Business Manager site.

For the Storefront:
1. Navigate to **Administration > Sites > Manage Sites > [Your Storefront Site] > Settings**.

2. In the **Cartridge Path** field, add `expertvoice_orderreporter` somewhere before `app_storefront_base` , separating each entry with colons, for example: `expertvoice_orderreporter:app_storefront_base` .
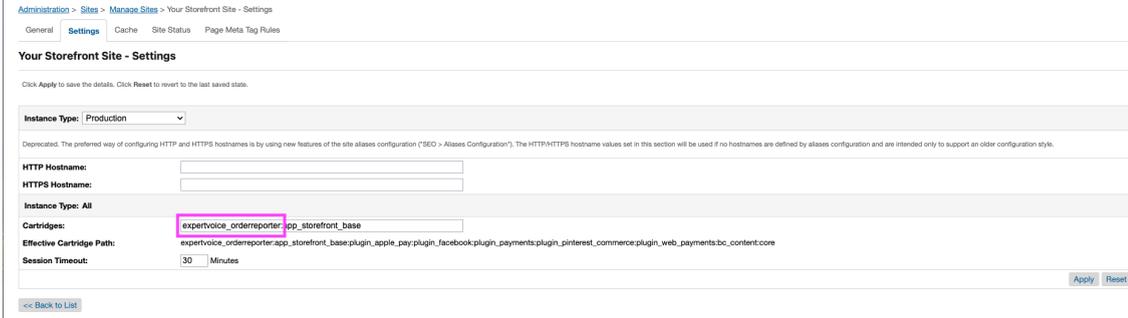
For the Business Manager site:

1. Navigate to **Administration > Sites > Manage Sites > Business Manager > Settings**.
2. In the **Cartridge Path** field, add `expertvoice_orderreporter` somewhere before `bm_app_storefront_base` , separating each entry with colons, for example: `expertvoice_orderreporter:bm_app_storefront_base` .
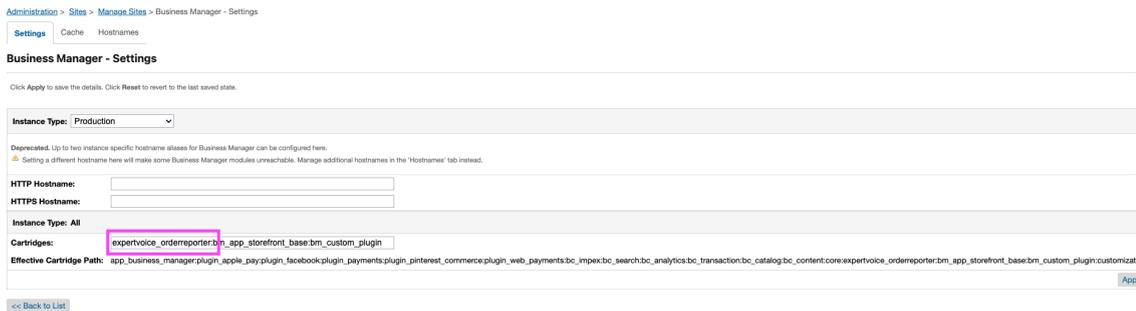
3. You may wish to toggle the code versions to resolve any cache issues. You can do this by navigating to **Administration > Site Development > Code Deployment**.

Enabling Module Permissions

After adding the cartridge, you need to enable permissions for the ExpertVoice Order Reporter module:

1. Navigate to **Administration > Organization > Roles & Permissions**.
2. Click on the "Administrator" role (or whichever role needs access to the module).
3. Select "Business Manager Modules" from the permissions list.
4. Click "Select context" and choose your site.
5. Find "ExpertVoice Order Reporter Preferences" in the list and check the "Write" permission.
6. Click "Apply" to save the changes.

Important: You will need to repeat this step for each site you wish to use the module for.

Configuration

Once the cartridge is installed and permissions are enabled, you'll need to configure the following settings:

1. Navigate to **Merchant Tools > Site Preferences > ExpertVoice Order Reporter Preferences**.

2. **Reporting ID Setup**:

   - Reporting ID: Enter the Reporting ID provided by ExpertVoice, for example: `exp-123-456789`.
   - Update Reporting ID: If the Reporting ID changes in the future, you can update it here.

3. **Filter orders**:

   - You may leave this blank if you don't need to filter orders.
   - If you do wish to limit orders sent to ExpertVoice, enter discount code prefixes to send. You can add multiple prefixes by separating them with commas.

Make sure to save the changes to the configuration after updating the settings.

Testing

To test the ExpertVoice Order Reporter cartridge, follow these steps:

1. Place an order on your storefront using the ExpertVoice discount code.
2. Check the order details in the Business Manager to ensure the order data is being captured correctly.
3. Verify that the order data is being sent to ExpertVoice by checking your ExpertVoice reporting.

If you encounter any issues during testing, please contact the ExpertVoice support team for assistance.