

# 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.

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

Upload Archive:

Local  Remote

No file chosen

Select	Name	Location	File Size	Last Modified
<input checked="" type="radio"/>	instance/metadata.zip	local	1.34 KB	10/24/24 12:09:00 pm
<input type="radio"/>	SiteGenesis Demo Site			
<input type="radio"/>	Storefront Reference Architecture Demo Sites			

#### Export

Provide a name for the export archive, select the units you want to export, and click Export. By default, export files are saved in the local export directory and are accessible to the current instance only. If the file needs to be shared by multiple instances (e.g., Production, Sandbox, Development) save it in the global export directory using the respective check box. Fields with a red asterisk (\*) are mandatory. Note that export into subfolders isn't supported.

Archive Name\*   Save in Global Export Directory

#### Data Units to Export

Data*	Description
<input type="checkbox"/> Sites	All site data
<input type="checkbox"/> Libraries	All shared libraries
<input type="checkbox"/> Library Static Resources	All content images
<input type="checkbox"/> Catalogs	All catalogs
<input type="checkbox"/> Catalog Static Resources	All product images
<input type="checkbox"/> Price Books	All price books
<input type="checkbox"/> Inventory Lists	All inventory lists
<input type="checkbox"/> Customer Lists	All customer lists
<input type="checkbox"/> Global Data	All global data
<input type="checkbox"/> Assignments	All assignments

#### Status

There are currently no import or export processes to show here.

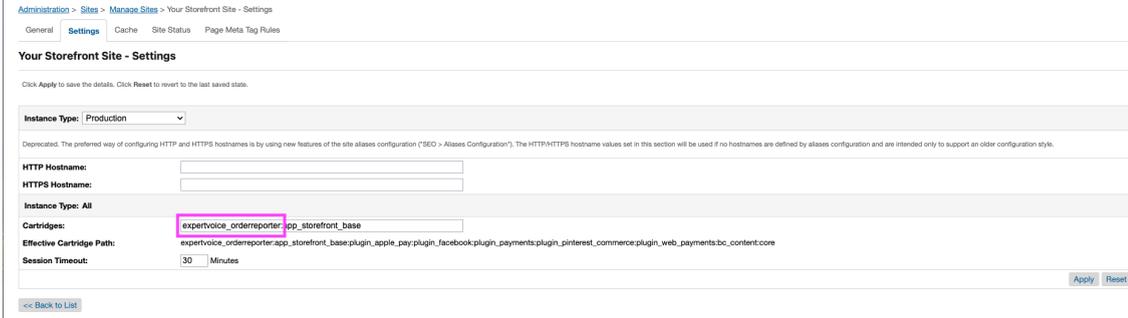
## Adding the Cartridge to the Cartridge Path

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

### For the Storefront:

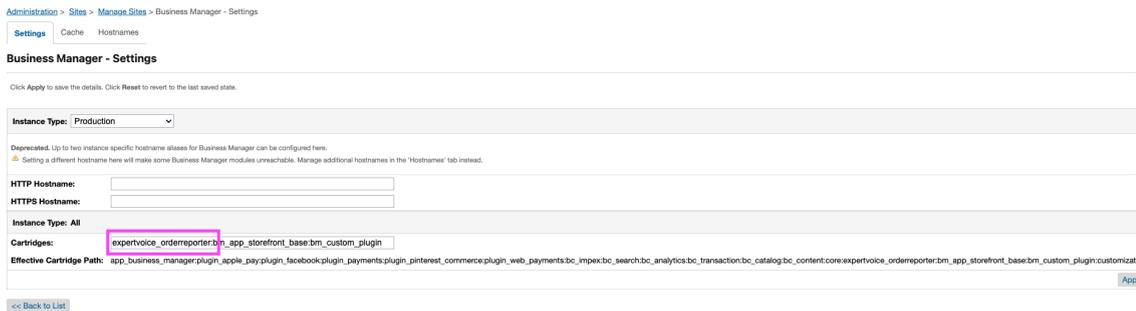
1. Navigate to **Administration > Sites > Manage Sites > [Your Storefront Site] > Settings**.

- 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:**

- Navigate to **Administration > Sites > Manage Sites > Business Manager > Settings.**
- 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`.



- 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:

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

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

Administration > Organization > Roles > Administrator - Business Manager Modules

General Users **Business Manager Modules** Functional Permissions WebDAV Permissions Locale Permissions Price Adjustment Limits Customer Service Center Permissions

### Administrator - Business Manager Modules

This list shows all Business Manager modules available in the system for which permissions can be granted. Click **Select Context** to select the context for which you would like to modify permissions. Available context options are the organization, one site, or multiple sites. Select the checkboxes and use the **Update** button at the bottom of the page to grant permissions to certain Business Manager modules. Deselect the checkboxes and use the **Update** button to revoke permissions to specific Business Manager modules. Read access may be granted to an increasing number of Business Manager modules. Write access includes read access. When removing read access, make sure you haven't also granted write access for the respective feature. When multiple contexts are selected with different permissions for a feature or module, detailed information can be viewed by clicking in the "Details" column.

Selected Context: SiteGenesis		Read	Write
<a href="#">Select Context</a>			
Business Manager Module	Module Description		
Products and Catalogs		<input type="checkbox"/>	<input type="checkbox"/>
Products	Manage the products of the organization. Note: Due to the relation between products and product sets, it is not possible to combine read and write access between these two modules. Please note that for read-only access across the entire 'Products' module the functional permissions 'Manage_Site_Catalog', 'Manage_Site_PriceBooks', and 'Manage_Site_Inventory' are required in the site context. For full write access, the additional organization-level functional permission 'Manage_All_Catalogs' is required.	<input type="checkbox"/>	<input type="checkbox"/>
Pinterest Commerce	Manage the Pinterest Commerce configuration.	<input type="checkbox"/>	<input type="checkbox"/>
Privacy	Manage the privacy preferences for this site.	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service Center Preferences	Manage the Customer Service Center preferences for this site.	<input type="checkbox"/>	<input type="checkbox"/>
Apple Pay	Manage the Apple Pay configuration.	<input type="checkbox"/>	<input type="checkbox"/>
ExpertVoice Order Reporter Preferences	Manage ExpertVoice Pixel ID and other preferences	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[Reset](#) [Update](#)

[Back to List](#)

## 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.

Merchant Tools > Site Preferences > ExpertVoice Order Reporter

### ExpertVoice Order Reporter Settings

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.

Reporting ID setup
Reporting ID: <input type="text" value="exp-123-456789"/>
Filter Orders
Prefixes: <input type="text" value="EV-"/> Filter the orders that are sent to ExpertVoice for validation. Enter a list of prefixes, separated by commas.

[Apply](#)

## Testing

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

- Place an order on your storefront using the ExpertVoice discount code.
- Check the order details in the Business Manager to ensure the order data is being captured correctly.
- 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.