



ROUND-NECK T-SHIRT

\$19 \$10



**antavo**  
loyalty programs for retail

## int\_antavo - Integration Guide

Antavo seamlessly integrates with your systems to reduce implementation and operational costs and make your customer retention even more effective

# Summary

Antavo is a leading SaaS technology that runs innovative customer loyalty programs for retail, fashion, beauty, lifestyle, and hospitality. We help omnichannel and ecommerce brands' CRM efforts by supercharging their marketing technology. Change customer behavior and drive uplift in brand metrics and customer lifetime value with Recognition Loyalty™.

- We serve clients like Jimmy Jazz, the N Brown Group, Beer Hawk / AB InBev and LuisaViaRoma – contributing 16% growth in revenue for the latter.
- We are an international team of 50, with offices in the UK, France, Italy and Hungary.
- Being a forward-thinking company disrupting the loyalty industry, 60% of company revenue is reinvested in R&D.

## Component Overview

### Functional Overview

The **int\_antavo** cartridge helps run loyalty programs for your customers shopping online and speed up the integration of the Antavo Loyalty Management Platform services with your Commerce Cloud site(s).

By integrating the **int\_antavo** cartridge into the Commerce Cloud reference application SiteGenesis v2 you will have access to the following features:

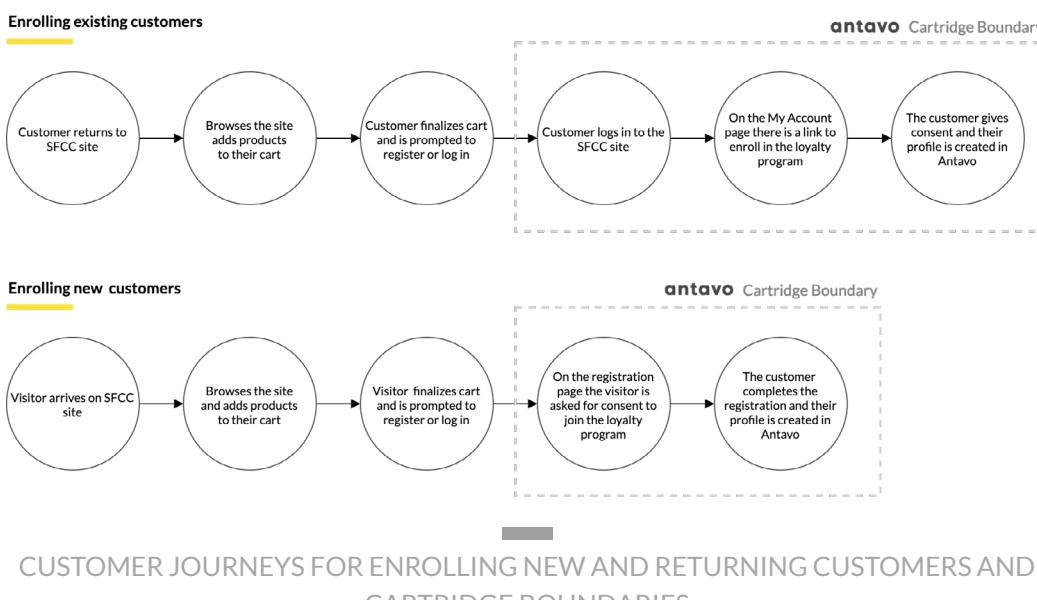
- Enroll new and existing customers to the loyalty program
- Manage sign-ons to the loyalty program (SSO)
- Embed membership page in SFCC
- Offer digital coupons generated in SFCC
- Embed the Javascript SDK to enable client-side event tracking
- Embed a social engagement widget in the pages of SFCC
- Create an online treasure hunt on product pages in SFCC
- Provide friend referral functionality for new and existing customers
- Display points campaigns on product pages, listing pages and in the cart overview in SFCC

# Use Cases

## Enrolling Customers in the Loyalty Program

New customers can access the loyalty program by registering to the Commerce Cloud site, giving consent during the registration process, then clicking the gift button on the top navbar after logging in.

Returning customers can access the program by logging in, visiting their Personal Data page, giving consent, then clicking the gift button on the top navbar. The cartridge handles all necessary data transfers with Antavo services.



Customers who participate in the loyalty program can decide to opt-out from the loyalty program by visiting their Personal Data page and clicking the opt-out button in the corresponding section. This will automatically delete all of their data from Antavo. This operation cannot be undone.

## Manage sign-ons to the loyalty program

After the cartridge has been installed, customers will be able to access the loyalty program by logging into the site. If they are members of the loyalty program their order data, some site usage and behavioral data will automatically get shared with Antavo.

The membership page (described below) will be accessible for both guests, customers who are not loyalty members and loyalty members as well. However, only members will be able to interact with the loyalty program through the membership pages, others will only see static content.

# Embed a membership page in Salesforce Commerce Cloud

The membership page is a mobile responsive microsite provided by Antavo, which can be embedded in your Salesforce Commerce Cloud site. It is a one stop shop for all things related to your loyalty program and customers can use this to see how they can engage with your loyalty program and what kind of rewards are available. If you would like to run a points-based program, this can be the place to show your customers their point balance statements.

- The cartridge will automatically create a session for any customer who is a loyalty member so they can see personalized content on the membership page and interact with the program
- The membership page will be available through an iframe, which is automatically sized to fit its container

The screenshot shows the Salesforce commerce cloud homepage. At the top, there's a green banner with the text "FREE 2-Day SHIPPING FOR ORDERS OVER \$300". Below the banner is the Salesforce logo and the text "commerce cloud". A search bar with the placeholder "Enter Keyword or Item No." is followed by icons for gift, location, user profile, and a shopping cart with a "1" notification. The main navigation menu includes "NEW ARRIVALS", "WOMENS", "MENS", "ELECTRONICS", and "TOP SELLERS". On the left, a sidebar titled "My Account" contains sections for "MY ACCOUNT" (Personal Data, Addresses, Payment Settings), "ORDER INFORMATION" (Order History), "WISH LIST" (Modify Wish List, Search Wish Lists), "GIFT REGISTRIES" (Create Registry, Search Registries, Modify Registries), "SHOP CONFIDENTLY" (Privacy Policy, Secure Shopping), and "NEED HELP?" (Customer Service, Monday to Friday, 8 AM to 8 PM, 1 (800) 555 0199). The main content area features a large "REDEEM POINTS" heading with the subtext "Claim exclusive rewards, fun experiences and discount coupons for your points." Below it is a box containing "100 POINTS = 1€ DISCOUNT" and a yellow "REDEEM NOW" button. Further down, there's a section titled "YOUR REWARDS" with a "WELCOME GIFT" image of a wrapped gift box and a yellow "GET YOURS" button.

THE MEMBERSHIP PAGE CAN BE EMBEDDED IN THE MY ACCOUNT SECTION OR  
CAN BE INCLUDED ON ANY CUSTOM PAGE

Customers will be able to access the membership page through a link in the top navbar, but you can also reference this page elsewhere. Members of the loyalty program will be automatically logged in and the membership page will automatically be populated with offers, benefits and engagement points personalized to the customer.

## Javascript SDK

The Javascript SDK is a multi-purpose SDK which powers client-side features. It can be loaded asynchronously and used for the most common tasks:

- Enable SSO between the Salesforce Commerce Cloud Digital Storefront and the membership page
- Automatically size the membership page embedded as an **iframe** so its content fits in the viewport
- Fetch customer and program-related information asynchronously using AJAX requests
- Render and size loyalty widgets
- Submit client-side events like page visits, share impressions or any custom events using built-in tools

## Embed social engagement widget

Antavo offers a social widget that can be embedded into your Commerce Cloud site. This widget allows your customers to share content over social media in order to earn points or other incentives without leaving your site.

The widget comes in a form of easy to embed HTML code snippet, which is automatically populated with the necessary content. By design, the widget will appear as a floating bar when the customer accesses the Commerce Cloud site through their computers and as a floating button when they are on mobile. The look & feel can be customized and made to match the branding of your site using HTML & CSS.

## Create online treasure hunt on your product pages

You can use the Loyalty Management Platform to set up an online treasure hunt on the product pages of your Commerce Cloud site. Your customers will need to find one or more product pages in order to win bonus points or other rewards. Antavo displays a floating notification to your customers if they have successfully found the “treasure” they have been looking for. You can use this feature to gamify the customer journey on-site and let them discover products and services in a fun way.

## Provide friend referral functionality for new and existing customers

Antavo comes with a friend referral functionality that allows you to run referral programs, in which customers can invite their friends and earn points or other benefits. Customers will only be rewarded if the friends they invite register and make a qualifying purchase. You can also give new shoppers who have registered through the friend referral program one-off discounts as an optional incentive.

The cartridge facilitates processing of the decorated referral links, storing referral information for customer sessions and calling in referrals to Antavo. Customers can view their unique referral link on the embedded Membership Page in Salesforce Commerce Cloud. The Antavo Loyalty Management Platform can be used to define the rules of the referral program and to see how the program is performing.

## Display points campaigns on product and listing pages and in the cart overview

Antavo provides widgets which can display the number of points the customer can earn for purchasing individual items or the whole customer cart. If configured correctly, these widgets take all points-based campaigns set up in the Loyalty Management Platform into account. All you need to do is to set up the campaign in Antavo using the built-in Rules Editor and the updated point values will automatically appear on your Salesforce Commerce Cloud site.

## Limitations and Constraints

The `int_antavo` cartridge can be downloaded for free but an active Antavo Loyalty Management Platform subscription is required for it to work.

- This cartridge does not create campaigns or promotions. If you would like to offer digital coupons valid in Salesforce Commerce Cloud to your customers as a reward, follow these steps:
  - Set up a Promotion and create a Coupon in the Promotion
  - Open the Antavo Loyalty Management Platform
  - Create a new Reward, select Coupon as the reward type
  - Select Salesforce Commerce Cloud as the Coupon source
  - Select the Coupon you have just created in Salesforce Commerce Cloud
- This cartridge does not take any Campaign created in Salesforce Commerce Cloud in account when calculating the point value of a product, cart or collection. Should you wish to work with any Campaigns you can adjust how the point calculation works in `/int_antavo/utils/helpers/helper.js`

## Compatibility

The cartridge is compatible with Salesforce Commerce Cloud version 19.10 (compatibility mode: 18.10) and SiteGenesis version 104.0.1.

# Privacy and Payment

No credit card data is stored or transmitted by this cartridge. Some customer data will be transmitted, including but not limited to the customer's first and last name, email address and behavioral data. Antavo also tracks and associates purchase data to customer profiles.

# Implementation Guide

## Setup

### Importing Custom Object Definitions

To import custom objects and preferences used by the Antavo cartridge, login to the Business Manager, navigate to **Administration ▶ Site Development ▶ Import & Export**, and click the “Upload” button. Locate the **int\_antavo\_metadata.xml** on your computer and upload the file.

Once the upload is complete, click the “Back” button and then click the “Import” button in the Meta Data section. Select the Antavo settings file you have just uploaded and click “Next” to validate the file.

Once validated, click the “Import” button to finish the process.

## Customizing Code

### Embedding the Javascript SDK

A single remote include is necessary to render a JavaScript reference to all pages of the storefront to enable client-side single sign-on, seamless sizing of the membership page, rendering of various widgets and many more. This code is required to be included on every page of the storefront, regardless of whether or not the customer is logged in.

We recommend adding the following **isinclude** line to the bottom of your footer include template, which can typically be found at the following path:

```
/app_storefront_core/templates/default/components/footer/footer.isml
```

```
<isinclude url="${URLUtils.url('AntavoJS-Include')}">
```

# Embedding the Membership Page

## Prerequisites

If you want to display the Membership Page for your customers, the URL of the page should be configured in your Business Manager site.

The first step is to acquire the URL through the Antavo Loyalty Management Platform. Please log in to the platform and head over to **Settings ▶ General Settings** page. Scroll down until you see the Domains and URLs section where the **Protocol** field (`https://`) and the **Custom Domain** field will hold the URL of the Membership Page.

**DOMAINS AND URLs**

Protocol	Custom Domain
<code>https://</code>	<code>loyalty.thestoreonline.co</code>

If you want to run a white-labeled loyalty program, you can set a custom domain below.

**Update**

THE MEMBERSHIP PAGE URL IS THE COMBINATION OF THE PROTOCOL AND CUSTOM DOMAIN VALUES

In the example given above, the Membership Page URL would be [`https://loyalty.thestoreonline.co`](https://loyalty.thestoreonline.co).

After you have acquired the Membership Page URL, you should log into the Business Manager and navigate to **Merchant Tools ▶ Online Marketing ▶ Antavo Loyalty ▶ Membership Page Configuration** and fill in the Membership Page URL input field with the URL you have just acquired.

If you would like to show the membership page on your Commerce Cloud site, you can do so by using a predefined controller, named **LoyaltyMicrosite-Show**.

Please note that you must define the page template to be used for the aforementioned controller. For a better visual experience; you can specify the template in the Business Manager.

## Adding the Membership Page to the navigation bar

Once you have successfully configured the Membership Page and set up the controllers according to the instructions, you can add a link to the page to the top navigation bar.

We recommend adding the following line to the bottom of your header template, which is typically located in the path like this:

```
/app_storefront_core/templates/default/components/header/header.isml
```

```
<li class="antavo-microsite-menu">
    <a href="${URLUtils.https('LoyaltyMicrosite>Show')}" title="Membership Page">
        <i class="fa fa-gift"></i>
        <span>Membership Page</span>
    </a>
</li>
```

## Sending customer registrations to Antavo

If you would like to create a new customer profile when the customer signs up to your Commerce Cloud site, you should ask for customer consent and then call in the registration to Antavo, using APIs.

### Add a new checkbox to your registration form

```
<field formid="loyalty_optin" label="profile.loyalty_optin" type="boolean"
/>
```

In the SiteGenesis reference template, you should inject this code to:

```
storefront_core/cartridge/forms/default/profile.xml:12
```

### Show the loyalty opt-in checkbox in the template

Add these lines to your registration template:

```
<isif condition="${!(customer.authenticated && customer.registered)}">
    <isinputfield formfield="${pdict.CurrentForms.profile.customer.
loyalty_optin}" type="checkbox" />
</isif>
```

In the SiteGenesis reference template, you should inject this code to:

```
storefront_core/cartridge/templates/default/account/user/
registration.isml:55
```

## Checkbox localization

You can localize the opt-in checkbox's label with the default Salesforce Commerce Cloud localization approach. Just add a new entry to your `forms.properties` file, like:

```
profile.loyalty_opt_in=I would like to join the loyalty program.
```

In the SiteGenesis reference template, you should inject this code to:

```
storefront_core/cartridge/templates/resources/forms.properties
```

You can translate the checkbox text to other languages. For example, if you want to translate to German, add a new locale entry to your `forms_de_DE.properties`, like the following example:

```
profile.loyalty_optin=Ich möchte dem Treueprogramm beitreten.
profile.loyalty_terms_text=Ich akzeptiere die Bedingungen.
```

To comply with GDPR, please provide a link to your Terms & Conditions page below the checkbox you have just created.

## Sending opt-in event to the Antavo Events API

You should place the following code snippet right after the opt-in code; this code will send an API request to the Antavo Events API

```
var eventHandler = require("int_antavo/cartridge/scripts/events/
Handler");
eventHandler.Handler.fire(eventHandler.EVENT_AFTER_CUSTOMER_OPT_IN, this,
{
    opt_in: app.getForm("profile").object.customer.loyaltyOptIn.
getValue(),
    customer: profileValidation || customer,
});
```

In the SiteGenesis reference controller, you should inject this code to:

```
storefront_controllers/cartridge/controllers/Account.js:428
```

## Opting-in existing customers

If you would like to enable your previously registered customers to opt-in to your loyalty program, you can place an “Opt-in” button on the customer account page:

```
<isinclude template="antavo/includes/profile/opt-in" />
```

In the SiteGenesis reference template, you should inject this code to:

```
storefront_core/cartridge/templates/default/account/user/
registration.isml:80
```

## Showing the number of points earned after a product on the product page

If you would like to show the amount of points the customer would earn after buying a certain product or service, you can include the following code snippet in your price partial template:

```
<isinclude template="antavo/includes/product-points" />
```

Make sure that the `pdict` object contains the `Product` variable at least.

In the SiteGenesis reference template, you should inject this code to:

```
storefront_core/cartridge/templates/default/product/components/
pricing.isml:158
```

## Showing the total number of points that can be earned on the cart page

If you would like to summarize the amount of points the customer would earn after purchasing their cart full of items, you should place the following code snippet in your cart partial template:

```
<isinclude url="${URLUtils.url('LoyaltyCart-Include')}" />
```

In the SiteGenesis reference template, you should inject this code to:

```
storefront_core/cartridge/templates/default/checkout/cart/cart.
isml:856
```

## Sending transactions to Antavo

If you would like to track purchases with Antavo, you should place the following snippet to your checkout controller, where the `order` variable is an `Order` instance

```
var eventHandler = require("int_antavo/cartridge/scripts/events/Handler");
eventHandler.Handler.fire(eventHandler.EVENT_AFTER_CHECKOUT, this, {
    order: order});
```

In the SiteGenesis reference controller, you should inject this code to:

`storefront_controllers/cartridge/controllers/COPlaceOrder.js:179`

## Showing the opt-out button for loyalty members

You should allow your customers to opt-out from the loyalty program. This is mandatory to comply with GDPR, but is also important in maintaining trust with your customers.

Please insert the following code snippet on the customer account page:

```
<isinclude template="antavo/includes/profile/opt-out" />
```

In the SiteGenesis reference template, you should inject this code to:

`storefront_core/cartridge/templates/default/account/user/registration.isml:112`

## Showing customer information on the storefront

If you want to show specific loyalty information about the customer on the storefront, just place a new HTML tag to your template in the following format:

```
<span data-antavo-field-*></span>
```

Where the \* can be:

- **level** - Will be populated with the current level/tier of the customer
- **score** - Will be populated with the total number of points the customer has earned since becoming a member
- **spent** - Will be populated with the number of points the customer has spent since becoming a member
- **spendable** - Will be populated with the number of points available for the customer to spend on rewards, discounts, contest entries, etc.
- **reserved** - Will be populated with the number of points the system reserved when the customer claimed a reward
- **pending** - Will be populated with the number of pending points the system has issued

For example:

```
<p data-antavo-field-pending></p>
```

## External Interfaces

### Importing Service Profiles

Service profiles set up parameters for use in HTTP calls made by Antavo's SFCC cartridge. These settings define the API endpoint, API credentials, and the timeout for any HTTP request made.

To import the service profiles used by the HTTP services, navigate to **Administration ▶ Operations ▶ Import & Export** and click the “Upload” button in the Import & Export Files section. Find the **int\_antavo\_service\_profiles.xml** file on your computer and upload the file.

Once the upload is complete, click the “Back” button, then click the “Import” button in the Services section. Select the Antavo service import profiles and go through the validation wizard by clicking the “Next” button. Next, navigate to **Administration ▶ Operations ▶ Services**.

There, ensure that two service profiles for Antavo exist under the **Services** tab. The profile defines the service type, a log prefix, and a profile and credentials mapping. The Antavo HTTP services utilize the same settings profile which defines parameters such as timeouts for requests.

Click on the **Profiles** tab and verify that a single **AntavoWebServiceProfile** entry exists. You may click on the link to view and change the default settings.

Finally, click on the **Credentials** tab and verify that a single, **AntavoHTTPCredentials** profile exists. Click on the link to view and update the settings.

Enter your API key as the username and API secret as the password in the designated fields. If you do not know your credentials, contact your Antavo Account Manager.

Once finished, click the “**Apply**” button to save your settings.

More information on how to set up and assign service profiles to services can be found at the official SFCC Documentation repository under **SFCC 16.6 ► Developing your storefront ► Web services**.

**SFCC Documentation:**

<https://documentation.b2c.commercecloud.salesforce.com/DOC1/index.jsp>

## API calls

The cartridge will call different types of REST APIs to query customer information or to call in purchases, registrations or even behavioral data to Antavo.

The following API products are used in the current version of the cartridge:

- Antavo Customers API
- Antavo Events API
- Antavo Campaigns API

All API calls are SHA-256 encrypted REST calls, made through HTTPS connections. Some API requests need to be signed to prevent request spoofing. The signature for these calls are implemented in the cartridge.

If you need more information on the API calls or have any questions regarding the data transferred, please reach out to [salesforce@antavo.com](mailto:salesforce@antavo.com).

# Testing

To use the functionality implemented in the cartridge you should have an active Antavo subscription. To test the integration you should have a sandbox Antavo environment and the setup should be complete, including the import of Service Profiles, import of Custom Object Definitions, and code customizations.

Case ID	Case	Test Steps	Pass
1	Embedding the Membership Page	Open your Salesforce Commerce Cloud (SFCC) Storefront, make sure you are logged out. Click on the gift box in the top navigation bar. Make sure the page loads up and displays the Membership Page. The Membership Page should have no customer session active and the generic How It Works page should be displayed.	
2	Embedding the Membership Page	As a registered user, click on the gift box in the top navigation bar. Make sure the page loads up and displays the Membership Page. The Membership Page should have an active customer session with the name of the user you have registered. Navigate through each section of the Membership Page and ensure the parent page (which the Membership Page is embedded in) resizes around the Membership Page.	
3	Embedding the Javascript SDK	Register a new user in your SFCC Storefront and log in. Open the development console in your browser (Google Chrome: <b>F12</b> on Windows, <b>Cmd + Shift + I</b> on Mac) and type in the following command: <b>Antavo.SDK.getCustomer()</b> . This should return the data of the customer you have just registered, along with some loyalty information (e.g. points balance).	

Case ID	Case	Test Steps	Pass
4	Sending customer registrations to Antavo	<p>Register a new user in your SFCC Storefront and log in.</p> <ol style="list-style-type: none"> <li>Log in to the Antavo Loyalty Management Platform and search for the customer you have just opted in at <b>Customer Insights ▶ Customers</b></li> <li>The customer should be found in Antavo after you have opted them in</li> </ol>	
5	Showing the opt-out button for existing customers	<p>As a registered user, navigate to the <b>My Account</b> page, which can be done by clicking the customer icon in the top navigation bar and selecting the <b>My Account</b> item in the menu.</p> <ol style="list-style-type: none"> <li>On the page that appears, click the <b>Personal Data</b> box</li> <li>Scroll down to the Loyalty Program section</li> <li>Click the “Opt-out” button</li> <li>Check if the button in the Loyalty Program section has changed to “Join” after the page has been reloaded</li> <li>Log in to the Antavo Loyalty Management Platform and search for the customer you have just opted out at <b>Customer Insights ▶ Customers</b></li> <li>The customer should not be found in Antavo after you have opted them out</li> </ol>	
6	Opting-in existing customers	<p>Register a new user in your SFCC Storefront, but do not join the loyalty program during the registration process.</p> <ol style="list-style-type: none"> <li>As the registered user, navigate to the <b>My Account</b> page, which can be done by clicking the customer icon in the top navigation bar and selecting the <b>My Account</b> item in the menu</li> </ol>	

Case ID	Case	Test Steps	Pass
6	Opting-in existing customers	<p>2. On the page that appears, click the <b>Personal Data</b> box</p> <p>3. Scroll down to the Loyalty Program section</p> <p>4. Click the “<b>Join</b>” button in the Loyalty Program section</p> <p>5. Check if the button in the Loyalty Program section has changed to “<b>Opt-out</b>” after the page has been reloaded</p> <p>6. Log in to the Antavo Loyalty Management Platform and search for the customer you have just opted in at <b>Customer Insights ▶ Customers</b></p> <p>7. The customer should be found in Antavo after you have opted them in</p>	
7	Sending transactions to Antavo	<p>As a registered user, add items to your cart.</p> <p>1. Open the cart page, and check the number of points you would get after the purchase. Take note of the number.</p> <p>2. Complete the purchase on the Storefront</p> <p>3. (Optional) Log in to the Business Manager and ship the purchase</p> <p>4. Log in to the Antavo Loyalty Management Platform and search for the customer you have completed the purchase for at <b>Customer Insights ▶ Customers</b></p> <p>5. Open the Events History of the customer by navigating to <b>Customer Insights ▶ Customers ▶ Customer Name ▶ Events History</b></p> <p>6. Check to ensure the purchase with the same cart data as you have purchased in the Storefront is displayed and the number of points given is exactly the same as noted in 7.1</p>	

Case ID	Case	Test Steps	Pass
8	Showing the number of points that can be earned for a product on the product page	As a registered user, check different product pages. Ensure that each product page displays the number of points that can be earned for purchasing the product right below the product's price.	
9	Showing the total number of points that can be earned on the cart page	As a registered user, check different product pages 1. On each product page, take note of the number of points 2. Add each product you check to the cart 3. Once you have added all the products you would like to check, go to the cart page 4. Check if the sum of points given for the cart matches the sum of points you noted for each product	
10	Showing customer information on the storefront	As a registered user, click the customer icon in the top navigation bar. Check the dropdown that appears. 1. The number of points accumulated on the account should be displayed on the left 2. The current tier of the customer should be displayed on the right.	

# Operations and Maintenance

## Data Storage

This cartridge uses 2 custom objects. The **AntavoConfig** custom object holds all the configurations for a given site and 1 instance exists for every existing site which has the cartridge installed. The other one is called **AntavoRequestQueue** and it is used to queue any asynchronous requests made by the cartridge.

## Availability

Antavo's APIs are configured for maximum availability. To ensure no requests get lost, they are sent to Antavo via server side HTTP requests. In the event that HTTP requests are not successfully accepted by the endpoint, they will be stored in Salesforce Commerce Cloud. Failed requests will be processed by a scheduled job to ensure synchronization once availability returns.

Antavo also monitors inbound and outbound traffic of our servers to ensure any performance degradation or service disruption gets addressed immediately.

## Support

Should you face any difficulties setting up the cartridge or configuring your loyalty program, please reach out to your technical project manager. If you do not have a technical project manager just yet, you can reach out to us by sending an email to [salesforce@antavo.com](mailto:salesforce@antavo.com).

# User Guide

This document contains all the necessary information to set up, configure and run the **int\_antavo** Salesforce Commerce Cloud cartridge. Should you have any questions regarding the usage of the Antavo Loyalty Platform, please consult with the User Manuals on Antavo's website: <https://antavo.com/user-manual>

## Known Issues

There are no known issues tracked at the moment.

## Release Notes

Version	Date	Note
19.10	15 October, 2019	Initial Release