Extend

- ## Extend Integration for Salesforce Commerce Cloud

Welcome to Extend! We provide an easy way for any merchant to sell extended warranties - generating new revenue, increasing purchase conversion, and dramatically improving the customer experience.

This guide will walk you through the process of getting live with Extend protection plans, so you can start selling and earning revenue as quickly and easily as possible. The process is pretty simple - and even more simple with a connected SFCC reference application SFRA v4.4.0 (Version 20.1.0) store. Read on to learn more!

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1. Functional Overview

This integration cartridge makes it easy to enable the following features:

- Daily export catalog products to Extend
- Purchase extended warranties for eligible products
- Present an up-sell modal in PDP & Cart pages, for eligible products
- Generate contracts for newly purchased Extend warranties

2. Use Cases

For a merchant, the main use cases are:
- Possibility to enable/disable the main functionalities for Extend warranties in Business Manager
- Display warranty products in PDP & Cart
- Display an up-sell modal in PDP & Cart
- Generate warranty contracts upon order placement

For a customer, the main use cases are:
- Attach an extended warranty to a catalog product, in PDP & Cart and subsequently pay for it
- View details about the warranty products
- Remove warranties from the Cart (either by removing the main product or just the warranty product)

3. Limitations & Constraints

The following Extend features are not supported in this cartridge:

3.1 Quantity Match

When a customer adds a product to the cart and chooses to add an Extend warranty, the cart will be able to match the number of warranty products to the number of physical products added to the cart. This will ensure the accurate coverage for each of the products that are added. As a merchant, you can determine the behavior you want for quantities.

3.2 Cart Normalization

In order to ensure that a customer on a merchant's store adds the appropriate amount of extended warranties, Extend offers the ability to normalize the cart. Normalization allows for the cart to have only as many warranty products as the product it covers, not more.

In order to integrate these, your Extend representative will assist you throughout the process.

3.3 Compatibility

This cartridge has been developed and tested against Commerce Cloud Digital 20.1.0 and integrated on top of SFRA 4.4.0.

3.4 Privacy & Payment

This cartridge implements a custom object for temporary storing order data needed for Extend warranty contract generation. This custom object (*ExtendContractsQueue*) was implemented based on a queue pattern that gets consumed by a job configured to execute every 5 minutes. This data is not exposed publicly by any meanings, being used only in a server-to-server communication setup.

Extend doesn't handle any payments. The merchant is responsible for charging the end-user for the warranty plans he purchases, using the existing tenders that are currently supported on the specific environment. The merchant is responsible to generate Extend contracts only after he charged the end-user for the warranty plans he purchased.

● Implementation Guide

The SFRA version of this integration follows the extensibility and modularity design principles behind SFRA. It's been designed to live on top of the *storefront-base-architecture* components (*app_storefront_base & modules*). This means it's required that this cartridge is included in an environment that follows the SFRA recommendations.

1. Setup of Business Manager

1.1 Upload cartridge & include in the cartridge path
1. Upload the **int_extend_sfra** cartridge to the sandbox.
2. Go to Business Manager → Administration → Site → Manage Sites. Select desired site and go to Settings. At the beginning of the Cartridge Path add "int_extend_sfra:" in order to include the cartridge in the current site's configuration.

1.2 Import metadata
1. Go to Business Manager → Administration → Site Development → Import & Export
2. Upload the following files from ./metadata/meta/ folder
   a. system-objecttype-extensions.xml
   b. custom-objecttype-definitions.xml
3. Go to Business Manager → Administration → Site Development → Import & Export → Meta Data → Import. You should see both previous files as available for import. Proceed to importing both.

1.3 Import custom jobs
1. Go to Business Manager → Administration → Operations → Import & Export
2. Upload the following file: ./metadata/jobs.xml
3. Go to Business Manager → Administration → Operations → Import & Export → Jobs → Import. You should see the previous file as available for import. Proceed to importing it.

1.4 Import service
1. Go to Business Manager → Administration → Operations → Import & Export
2. Upload the following file: ./metadata/services.xml
3. Go to Business Manager → Administration → Operations → Import & Export → Services → Import. You should see the previous file as available for import. Proceed to importing it.
4. Note: by default, the service URL is configured to point to the demo instance of the Extend API. Prior to going live with the integration, this will need to be changed and tested against the live production API.

1.5 Import Extend catalog
1. Select the site you're integrating Extend with
2. Go to Business Manager → Merchant Tools → Products and Catalogs → Import & Export
3. Upload the following file: ./metadata/catalog.xml. Before uploading replace the catalog-id 'apparel-m-catalog' with master catalog id of your site.

```
<?xml version="1.0" encoding="UTF-8"?>
<catalog xmlns="http://www.demandware.com/xml/impex/catalog/2006-10-31" catalog-id="apparel-m-catalog">
    <header>
        <image-settings>
            <internal-location base-path="/images"/>
            <view-types>
                <view-type>large</view-type>
                <view-type>medium</view-type>
                <view-type>small</view-type>
                <view-type>swatch</view-type>
                <view-type>hi-res</view-type>
```

4. Then find and replace the catalog-id in classification-category element in catalog.xml. Do a bulk find and replace of 'storefront-catalog-m-en' with the storefront catalog id of the site on which Extend will be integrated.

```
        </options>
        <classification-category catalog-id="storefront-catalog-m-en">root</classification-category>
        <pinterest-enabled-flag>false</pinterest-enabled-flag>
        <facebook-enabled-flag>false</facebook-enabled-flag>
        <store-attributes>
            <force-price-flag>false</force-price-flag>
            <non-inventory-flag>false</non-inventory-flag>
            <non-revenue-flag>false</non-revenue-flag>
            <non-discountable-flag>false</non-discountable-flag>
        </store-attributes>
    </product>
```

5. This will import 3 dummy option products, which are used in order to create dynamic product line items in cart. We recommend keeping this as a separate master catalog, for visibility purposes.

2. Configuration

2.1 Catalog setup
- The 3 Extend products that need configuration are:
    - o EXTEND-12
    - o EXTEND-24
    - o EXTEND-36
- In order to make the Extend products merchandisable, you need to:
    - o Assign them to your storefront catalog
    - o Allocate an inventory record in the inventory file assigned to the current site
        - ▪ Configure this entry as perpetual, since these are intangible goods and need to always be in-stock
- These don't need any description, pricing or any other regular product attributes to be configured

2.2 Custom preferences
1. Go to Business Manager → Merchant Tools → Site Preferences → Custom Preferences → Extend
2. Configure the provided Extend credentials in the following fields
    a. Access Token: this is used for authenticating web service calls to Extend's API
    b. Store ID: this is used for the client-side Javascript SDK to identify the current store
3. Configure the image breakpoint for using when exporting the product feed
    a. The Image View Type is by default configured to large

b. Configure this to specify the breakpoint for the largest image size you have available across your products
4. Extend Javascript SDK URL
By default, this points to the demo JS SDK. Make sure that by the end of the integration process this is switched to the live production version.
5. Use the provided feature switches in order to enable / disable Extend features
a. Enable Extend
Enables / disables Extend globally
b. Enable Up-sell in Cart
Enables / disables the up-sell button and modal in Cart
c. Enable in PDP
Enables / disables Extend in PDP
d. Enable Up-sell in PDP
Enables / disables the up-sell modal in PDP

2.3 Image Configurations

1. Go to Business Manager → Merchant Tools → Products and Catalogs → Import & Export → Product Image Upload --> Manage Product Images
2. Then select the radio button against Master Catalog ID and hit OK.
3. Then create a new folder called extend under the master catalog directory as shown below.

4. Once the directory is created , select extend directory and upload the images provided in the images folder of the cartridge.

3. Jobs

3.1 Extend Products Export

This job uses Extend's API to traverse the entire storefront catalog and export each Simple and Variant Product that is, at the time of the job run, merchandisable (online and in stock).

1. Go to Business Manager → Operations → Jobs. Select the Extend Products Export job.
2. Go to Job Steps and select Scope. Configure this to run in the scope of the site you're implementing Extend for.
3. Schedule this to run once a day, at a time that's most suitable for your recurring job setup, ideally after the catalog is being updated.
4. Make sure you're running this once and notify Extend after the successful run. Warranty products or plans are dynamically generated based on this stream of products.

3.2 Extend Contracts Creation

This job uses Extend's API to consume contracts queue, stored in the ExtendContractsQueue custom object. As Extend plans are being ordered, an instance of this object is being created. Thereafter, this job will send a contract generation request for each queue element and then it will remove it from the queue.

4. External Interfaces

All requests are done through the Extend API. The full reference guide, along with the resource structure for requests, can be found on the developer site - https://developers.extend.com/latest

5. Firewall Requirements

None

- Testing

1. Enable Extend
- Make sure the following switches are set to Yes
  - Enable Extend
  - Enable in PDP
  - Enable Up-sell in PDP
  - Enable Up-sell in Cart
- Make sure the product catalog has been exported to Extend and your Extend representative enabled warranty plans in the system

2. PDP

2.1 Extend Plan
Go to any simple or variant product that has an Extend warranty enabled. Select a variation and you will be presented with the Extend offer and widget to select a warranty plan.
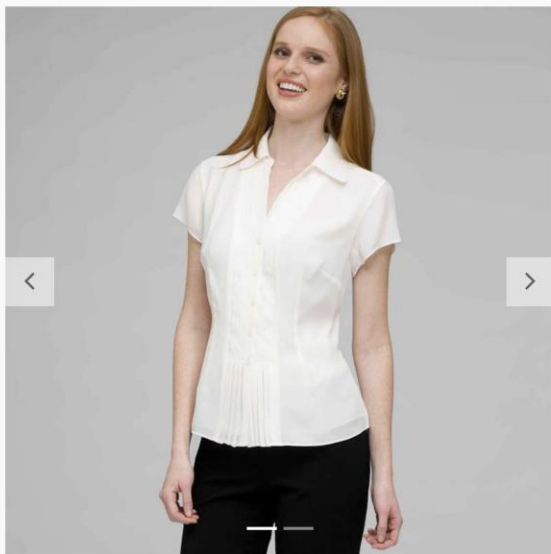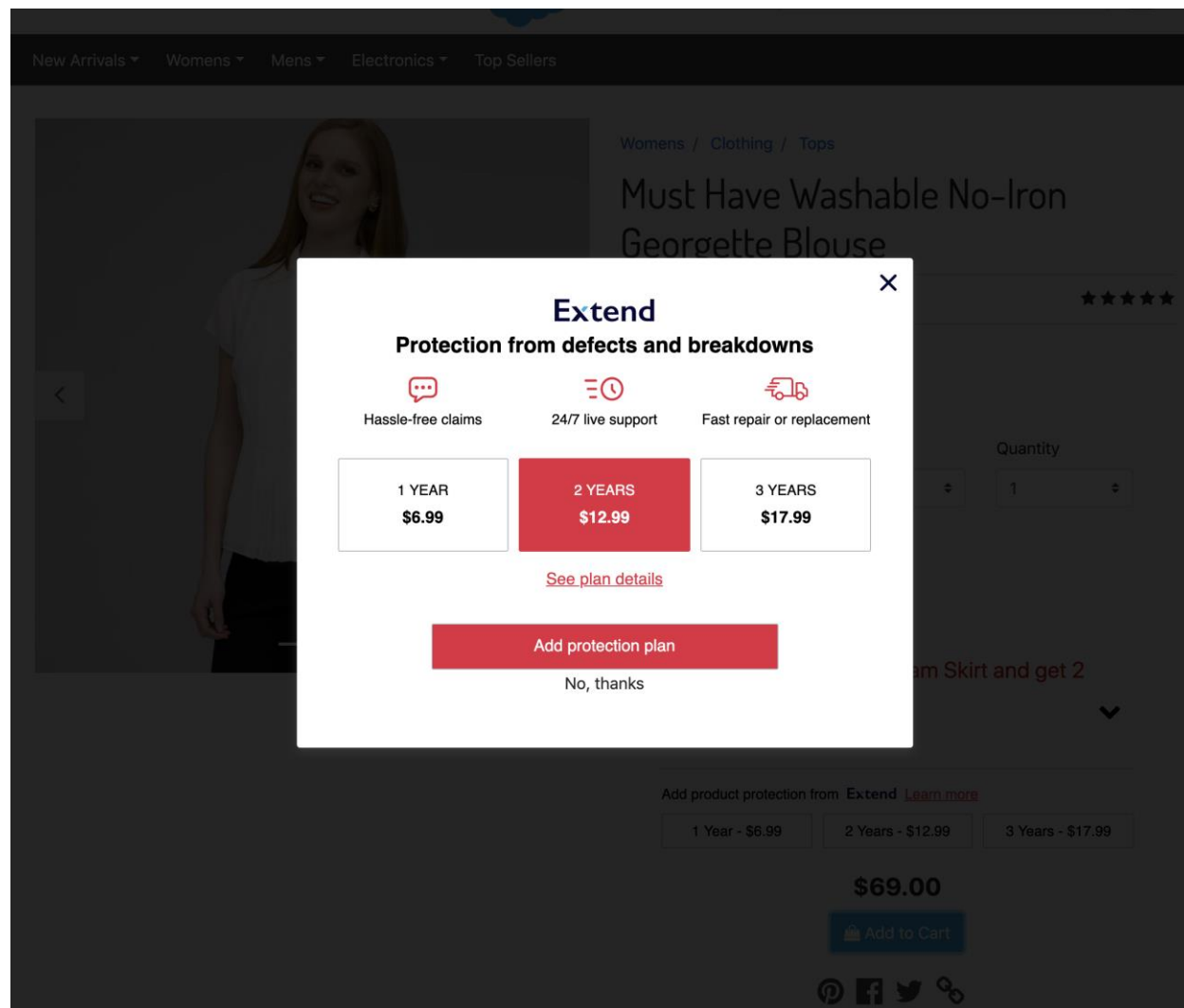
2.2 Add to Cart

Select an Extend warranty plan and click Add to Cart. You will notice 2 products were added to the cart – the SFCC catalog product along with the Extend warranty plan.

2.3 Up-sell Modal

Click Add to Cart on the PDP without selecting any Extend warranty plan. You will be presented with a modal recommending the associated Extend plans for this current catalog product. Selecting "Add protection plan" will proceed to add to cart the Extend plan, alongside the catalog product. Selecting "No, thanks" will only add to cart the catalog product.

3. Cart

3.1 Extend Plans in Cart
Confirm an Extend plan has been added to the cart.

3.2 Up-sell button for eligible products in cart
Add to cart an eligible for warranty product, without selecting any Extend plan for it. Go to the cart page. You will notice a button that recommends adding a protection plan.

Click on the up-sell button. You will be presented with a modal recommending the associated Extend plans for this current catalog product. Selecting "Add protection plan" will proceed to add to cart the Extend plan. Selecting "No, thanks" will close the modal.
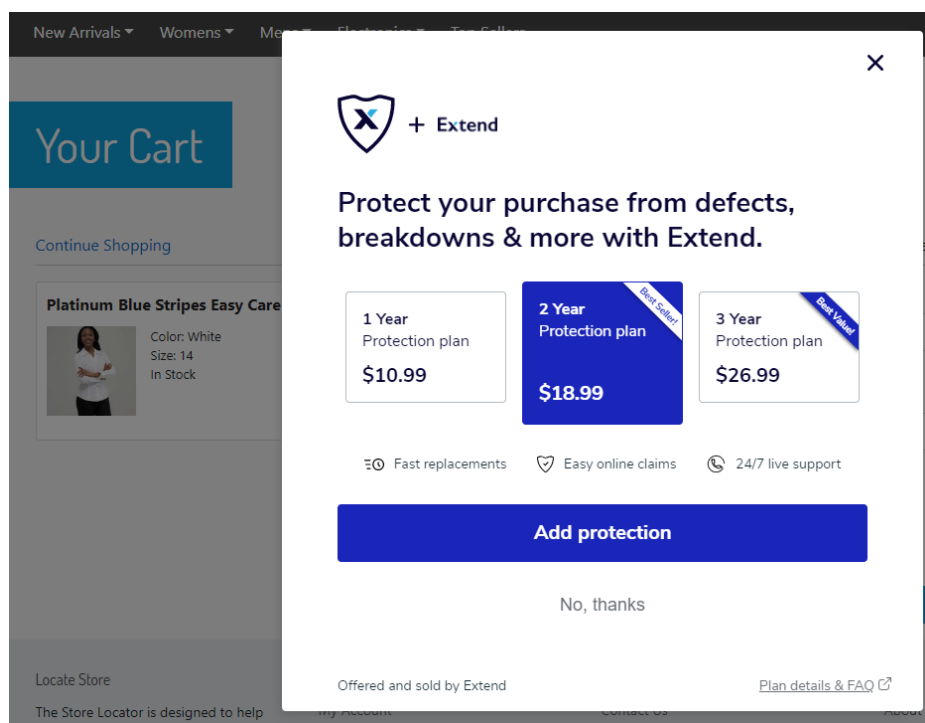
3.3 Up-sell modal in cart

Click on the up-sell button. You will be presented with a modal recommending the associated Extend plans for this current catalog product. Selecting "Add protection plan" will proceed to add to cart the Extend plan. Selecting "No, thanks" will close the modal.

3.4 Up-sell button for eligible products in mini cart

Add to cart an eligible for warranty product, without selecting any Extend plan for it. Hover on the mini cart icon on the page . You will notice a button that recommends adding a protection plan.

Click on the up-sell button. You will be presented with a modal recommending the associated Extend plans for this current catalog product. Selecting "Add protection plan" will proceed to add to cart the Extend plan. Selecting "No, thanks" will close the modal.
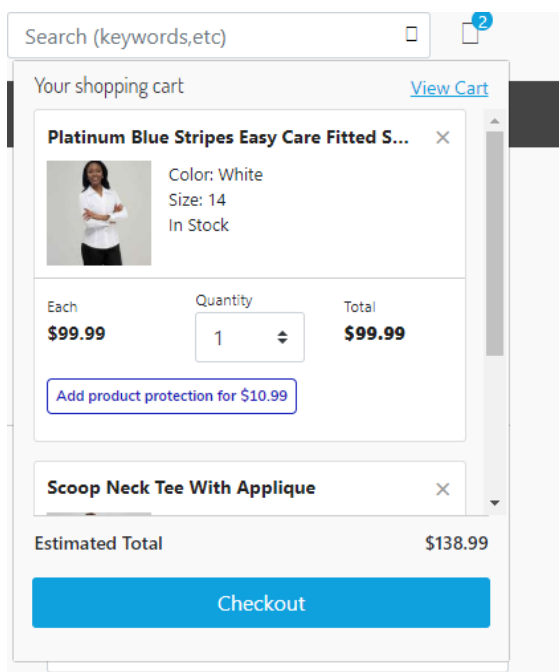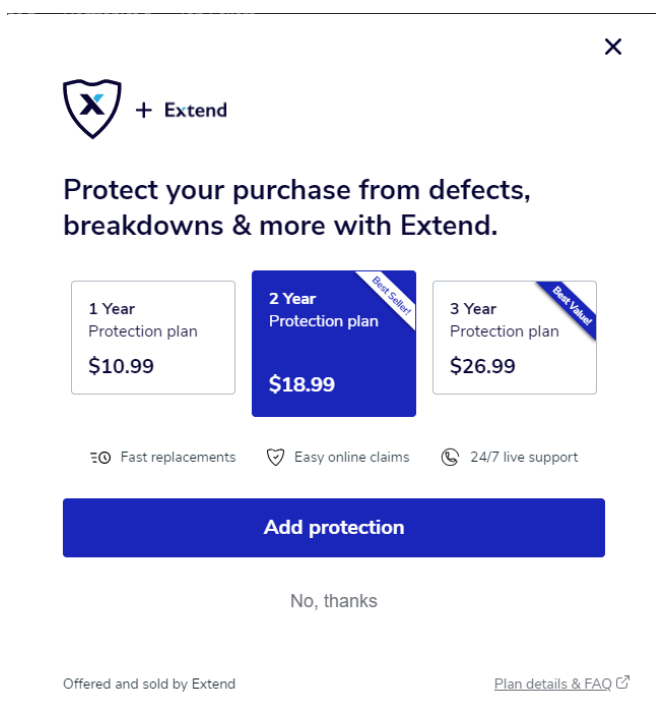
4. Business Manager

4.1 ExtendContractsQueue custom object

After placing an order containing Extend warranty plans, a new instance of this custom object is created. This holds all the data needed for generating an Extend contract.

Merchant Tools > Custom Objects > Custom Objects > 8f6c7fc79e60c41637321dab6a - General

General

Manage '8f6c7fc79e60c41637321dab6a' (ExtendContractsQueue)

Fields with a red asterisk (*) are mandatory. You can view and edit the name and description in other languages, if required. Click **Apply** to save the details.

contractData

Site Currency:	USD
Extend Warranty Plan:	{"purchasePrice":1364,"planId":"10001-misc-elec-base
SFCC Product:	{"referenceId":"008885538465M","purchasePrice":724
Last Modified:*	12/18/2019 : 9:50 pm
	MM/dd/yyyy h:mm a
Creation Date:*	12/18/2019 : 9:50 pm
	MM/dd/yyyy h:mm a
Order Customer:	{"phone":"4157477799","email":"kris@extend.com","nan
Log:	
Line Item UUID:*	8f6c7fc79e60c41637321dab6a
Order Total:	9,238.00 (Number)
Order Number:	00000907

4.2 Extend Contracts Creation Job

This job will process the ExtendContractsQueue object instances and will generate a contract for each instance. After successfully executing the request, the objects will be deleted.

4.3 Custom Preference configuration for Extend

Update the Extend custom preference configuration for the website. Add access token and store ID provided by Extend.

To Enable Extend in production mode, select **Use Extend In Production Mode** as true.

Name	Value	Default
Access Token		
(extendAccessToken) (String) Extend Access Token	eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJlbWFpbCI6InZrb2xsdXJppQHByb2thcm1hLmNvbSIsImFjY291bnRJZCI6IjU1YjEzMjFmLTZkODUtNGFlOC1hNjV	
Store ID		
(extendStoreID) (String) Extend Store ID	7ecc4688-61bb-4601-985c-8e2f61005b06 Extend Store ID	
Image View Type		
(extendImageViewType) (String)		large
Extend SDK*		
(extendSDK) (String) URL for the Javascript Extend SDK	https://sdk.helloextend.com/extend-sdk-client/v1/extend-sdk-client.min.js URL for the Javascript Extend SDK	https:/
Enable Extend		
(extendGlobalSwitch)	Yes	No
Enable in PDP		
(extendPDPSwitch)	Yes	Yes
Enable Up-sell in PDP		
(extendPDPUpsellSwitch)	Yes	Yes
Enable Up-sell in Cart		
(extendCartUpsellSwitch)	Yes	Yes
Use Extend In Production Mode		
(isExtendProductionMode)	None	No

• Questions? Feedback?

At Extend, customer experience is our North Star, and that goes for both our merchant customers (you!) and your store's customers as they buy your products and our protection plans. So, we want to do anything we can to make your Extend integration successful and to make your customers' experiences outstanding.

If you have any questions, please don't hesitate to reach out to us any time or contact integrations@extend.com for help. And if you have any feedback about our documentation, integration process, or our APIs and SDK, we are all ears!