Pinterest for SFRA

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1. Summary

This document describes how to integrate the Pinterest cartridge into the Salesforce B2C Commerce SFRA (Storefront Reference Architecture) reference application. The cartridge is designed for rapid installation, requiring minimal configuration but with options for further customization.

The Pinterest cartridge supports the following features:

- Loading the Pinterest client side conversion event handler library
- Constructing user meta data for use by the Pinterest client side conversion event handler library and server side conversion events from the storefront to the Pinterest API
- Using the Pinterest API to upload product data to Pinterest.
- Verifying your domains

2. Component Overview

2.1 Functional Overview

The Pinterest cartridge sends customer interaction data, customer profile data and product data from the B2C Commerce storefront to Pinterest. This data is used to display storefront products on Pinterest.

2.2 Use Cases

When the cartridge is enabled, customer specific data is sent to Pinterest, or "recorded," on page load for every page of the site. The user meta data for these "interactions" includes customer geolocation information and customer profile information. A full customer data profile is sent when a customer is logged in.

Product data is recorded when the customer navigates to a Product Detail Page (PDP). The meta data is updated and recorded again upon further customer interactions, such as adding the product to the cart.

Order data is recorded when the customer uses checkout, and it includes order totals.

2.3 Limitations and Constraints

This cartridge is only available for SFRA (Storefront Reference Architecture).

2.4 Compatibility

This cartridge has been tested with SFRA 6.3.0, compatibility mode 23.3 and with the default locale. There are no locale limitations.

Supported versions:
Compatibility Mode: 18.10 or higher
SFRA: v5.0.0 or higher*
* if lower than 5.0.0, please looks to add this PR into your version,
https://github.com/SalesforceCommerceCloud/storefront-reference-architecture/pull/773/files

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2.5 Privacy, Payment

Customer profile, interaction, cart, and order data are sent to Pinterest.

Customer consent for GDPR/CCPA etc are set through a configuration. See Configuration section below to enable it.

3. Implementation Guide

3.1 Setup of Business Manager

To install the cartridge:

1. Have your Pinterest Business Advertising Account created and ready.
2. Upload the cartridge to your environment. For Sandboxes you can use VSCode with the Prophet extension.
3. Add the cartridge ("**int_pinterest_sfra**") to each site's cartridge path to the **left** of app_storefront_base. Use a colon to separate the cartridge from the existing cartridges in the path. (Administration > Sites > Manage Sites > <YOUR SITE> - Settings)
4. Add the cartridge ("**bm_pinterest**") to the **Business Manager Site** cartridge path to the **left** of bm_app_storefront_base. Use a colon to separate the cartridge from the existing cartridges in the path. (Administration > Sites > Manage Sites > Business Manager - Settings)
5. Toggle code versions. This resolves some cache issues that may happen when new cartridges are introduced. (Administration > Site Development > Code Deployment)
6. Import metadata zip file. Go to Administration > Site Development > Site Import & Export, upload the zip file located in the metadata folder called Pinterest.zip and click "Import."
7. Add Business Manager Modules permissions for "Manage App Connection" and "Domain Verification" to the appropriate organization roles. Context is "Sites." (Administration > Organization > Roles & Permissions > Administrator - Business Manager Modules)
8. Configure the site preferences. Default values will work in most cases. (Merchant Tools > Site Preferences > Custom Preferences > Pinterest Configurations)
9. Connect site to Pinterest App. (Merchant Tools > Pinterest > View App Connection)

The JavaScript in this cartridge is contained within a script tag in a template file and static JavaScript files. There is no need to compile JavaScript.

3.2 Configuration

3.2.1 Create a WebDAV User and Access Key

In order for Pinterest to fetch your product data, you'll need to generate credentials. There are 2 ways this can be done.

1) Recommended Approach for Production

Create a new Account Manager User. This has to be a real email that you will have access to in order to set up 2FA. Once created, assign the role Business Manager User under eCommerce Platform in Account Manager as shown in the below screenshot.
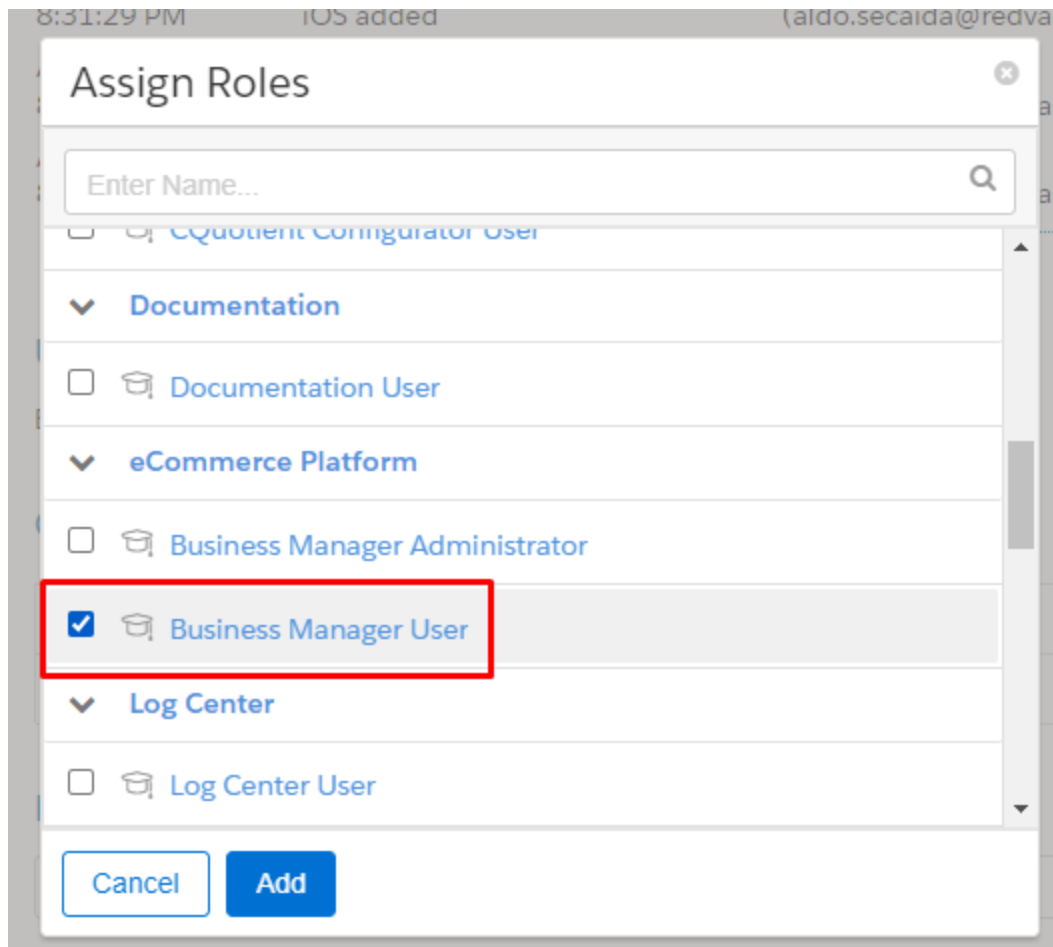
Next you will need to define the scope for the role and assign all the instances this user will need to have access to.

2) Secondary Option for non-Production Instances

Instead of creating a new Account Manager User, you will use your account.

Instructions for either option above

Once the user has been identified, you will need to log into the instance you are configuring. When you log into the instance for the first time, you should be on the profile page. If not, click the gray person icon in the top right corner. Then click on Manage Access Keys:

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There you will click the Generate Access Key button and select WebDAV File Access and UX Studio. Your email will be the pinterestWebDAVUser and the access key generated from this step is your pinterestWebDAVPassword that you need to save for use in the section 3.2.2.
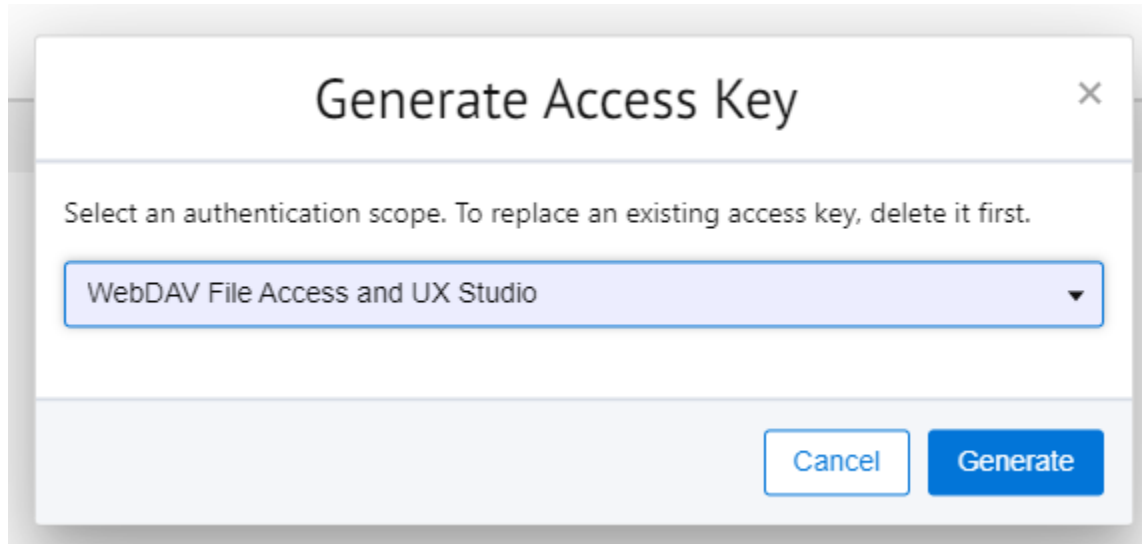
With the metadata import that was done in section 3.1, you now have a new Role that you will need to assign to the user. If you are an admin, you can self-assign the role to your user. If you created a new account, you will need an admin to assign you the role.

3.2.2 Configure Site Preferences

Navigate to **Merchant Tools > Site Preferences > Custom Preferences > Pinterest Configurations** and configure the following site preferences:

Name	ID	Description
Pinterest Enabled Conversion Clientside Calls	pinterestEnabledConversionClientside Calls	Flag for sending clientside conversion calls. This disables the clientside JS library. Default is true.
Pinterest Enabled Conversion Serverside Calls	pinterestEnabledConversionServerside Calls	Flag for sending serverside conversion calls. Default is true.
Pinterest Enabled GDPR	pinterestEnabledGDPR	Flag for enabling GDPR check. Default is False. Once this is enabled user consent is checked through SFCC inbuilt session.privacyCache.get('consent') value
Pinterest Enabled Realtime Catalog Calls	pinterestEnabledRealtimeCatalogCalls	Flag for allowing catalog inventory update calls to happen when an order is placed. Default is true.

Pinterest App ID	pinterestAppID	These values should not be changed to anything besides 1484575 or 1484576. Before considering changing to anything else please reach out to Pinterest. Production value is 1484575 and all other environments are 1484576. These are not unique to your site. Default is 1484575.
Pinterest WebDAV User	pinterestWebDAVUser	User the Pinterest API will use to connect to this environment to pull the XML catalog feeds from.
Pinterest WebDAV Password	pinterestWebDAVPassword	Password the Pinterest API will use to connect to this environment to pull the XML catalog feeds from.
Pinterest API Test Mode Enabled	pinterestAPITestModeEnabled	Enable Test Mode when interacting with Pinterest API. This only affects server side conversion event handlers. Default is false.
Pinterest Catalog Feed Product Image Size	pinterestCatalogFeedProductImageSize	Selects what product image size group to use in the catalog feed. The max product image size for the Pinterest catalog feed is an area of 89478485 pixels, or 9450 width x 9450 height. Defaults to 'large'.
Pinterest Refresh Token Expiration Buffer Seconds	pinterestRefreshTokenExpirationBufferSeconds	How many seconds before an API refresh token expires should it be refreshed. Default is 7 days (604,800 seconds).
Pinterest Integration Base URL	pinterestIntegrationBaseURL	Used for integration iframes in Business Manager. Default is 'https://commerce-app.pintergration.com'.

3.2.3 Connect App To Pinterest

1. First, select the site you want to set up and then go to Merchant Tools > Pinterest. You will see this screen.

Pinterest

Pinterest Configuration

Manage App Connection
Create a new connection, view an existing connection or remove a connection.

Domain Verification
Manage verification of domains and locales.

2. Select Manage App Connection. On this screen you will click "Connect."

Merchant Tools > Pinterest > View App Connection

Manage App Connection

Connect your store to Pinterest

use this connection to:

- **Automatically turn products into Pins**

- **Reach more shoppers**

- **Track and optimize conversions**

Connect

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3. Follow the prompts in the popup window. Once successfully completed App Connection is complete and you will be redirected to a connection status page:

4. Testing

4.1 Initialization (**Important!**)

1. Test domain verification:
    a. Go to Merchant Tools > Pinterest > Domain Verification and ensure you have all your domains claimed. we try to automatically claim the domains during the connection process. If there are domains that our cartridge could not claim because of custom URL mappings, please manually enter the domain URL in the input box and claim them.
        i. This step is important for conversion and catalog ingestion.
2. Test Tag and conversion API
    a. Install the official Chrome Plugin:
    https://chrome.google.com/webstore/detail/pinterest-tag-helper/gmlcbajhgoaaegmlbaclmmmh pmfdajmp?hl%3Den&sa=D&source=docs&ust=1681136199867334&usg=AOvVaw0Vq7nunP-p-5e 7hq8q_rKU
    While browsing the site you will see events populate the Chrome Plugin if everything is set up correctly.

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b. To verify the data that is being sent, use the Conversion Test tool provided by Pinterest: https://ads.pinterest.com/advertiser/<YOURACCOUNTID>/conversions/tag-events/
Provide the URL of the environment you wish to test and then browse that site in the new tab that opens.
c. To verify that conversion API is sending data, look in your event history for conversion data and select the conversion API option in the drop down (near the top right of the graph in the page) https://ads.pinterest.com/advertiser/<YOURACCOUNTID>/conversions/event-history/
   i. NOTE: Sometimes it takes a few minutes for our ingestion pipelines to process the events.
3. Test Catalogs
   a. Make sure that the new job created is attached to ALL the sites you have connected pinterest.
   b. Fine tune the job run time and frequency to your needs
   c. Run the job so that we can populate the catalog XML and register feed
   d. After the job is finished, visit https://www.pinterest.com/product-catalogs/data-source/ and verify that your feed is registered and processing has started. It might take a few minutes to few hours depending on the size of your catalog to completely process
   e. Once catalog ingestion is complete, verify any issues and the number of products ingested by expanding the feed profile card and viewing the specific ingestion run's details.
   f. You will need to wait 24 hours to see your product groups
4. Test catalog real-time updates
   a. Make sure your job for catalog real-time updates is running and the feature is enabled in the configuration.
   b. Use a test product to go from in-stock to out-of-stock. Cartridge will populate the product ID in metadata. Next time the job runs, it will make an API call to those out of stock items.

4.2 Deduplication Verification, Server Side and Client Side

The Pinterest Cartridge sends user event data both server side and client side on each page load. Pinterest then takes all that data and tries to merge the same event data fired from the client side to the same event data fired from the server side for each unique page load. This is called deduplication. They have a tool to help verify your data can be deduplicated properly. You may need several days of test event data to use this tool effectively in development and test environments. This is the most effective way to verify server side event data.

https://ads.pinterest.com/advertiser/<YOURACCOUNTID>/conversions/deduplication/

4.3 Category Client Side

To check that Pinterest fires on the category page, navigate to a category page and check the Pinterest Test events tool.

● you should see a VIEW_CATEGORY event

4.4 Search Client Side

To check that Pinterest fires on the search page, search for an item and load the search page and check the Pinterest Test events tool.

● you should see a SEARCH event
● the event should have a defined property of 'search_query'

4.5 PDP Client Side

To check that Pinterest fires on the PDP, navigate to a PDP and check the Pinterest Test events tool.

- you should see a PAGE_VISIT event
- the event should have a defined property of 'product_id'

4.6 Add to Cart Client Side

To check that Pinterest fires on add to cart events, navigate to a PDP and add an item to cart. Check the Pinterest Test events tool.

- you should see an ADD_TO_CART event
- the event should have a defined property named 'line_items'

4.7 Checkout Client Side

To check that Pinterest fires on the checkout confirmation page, add a product to cart and complete a purchase. Once on the order confirmation page check the Pinterest Test events tool:

- you should see an CHECKOUT EVENT event
- the event should have a defined property names 'line_items' and 'order_id'

4.8 Pinterest Catalog Feed

The Pinterest catalog job will generate product data and batch upload it to Pinterest using their API. On each run it will automatically add active catalog feeds and remove unused catalog feeds within the Pinterest API. With the metadata import done in step 3.1, you should see a new job called PinterestCatalogFeed. Make sure you update the site or sites that this job should run for in the Job Steps tab. By default, it is scheduled to run daily.

4.9 Catalog Out Of Stock Feed Job

This job should be run more often than the Pinterest Catalog Feed job. The purpose of this job is to update the Pinterest API with products that go out of stock in between Pinterest Catalog Feed updates which typically run once daily. With the metadata import done in step 3.1, you should see a new job called PinterestCatalogFeedOutOfStock. Make sure you update the site or sites that this job should run for in the Job Steps tab. By default, it is scheduled to run every 15 min.

5. Operations, Maintenance

5.1 Data Storage

This cartridge will store account information about your Pinterest Business Account. This cartridge does not store any customer data. Customer data is sent to Pinterest's APIs and stored on their systems.

5.2 Availability

Cartridge functionality is dependent on the availability of the Pinterest API.

5.3 Failover/Recovery Process

In the case that the Pinterest library fails to load, user data will not be sent to Pinterest, but the storefront will not otherwise be affected. Contact Pinterest support.

5.4 Support

https://help.pinterest.com/

6. User Guide

6.1 Business Manager

A Custom Site Preference Group is available for configuring Pinterest:

A Job is available for configuring Pinterest:

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A group of Services are available for configuring Pinterest:

A Custom Object is available for configuring Pinterest:

6.2 Events

Conversion Event data sent via client side and server side calls support the default data and functionality of the SFRA site. This cartridge can be extended to support your site's unique data needs in the following ways:

1. Client Side Conversion Events

File: cartridges/int_pinterest_sfra/cartridge/models/pinterest/eventClient.js
API Docs: https://help.pinterest.com/business/article/add-event-codes

By default, these Pinterest properties are supported by the cartridge:

- event_id
- product_id
- product_name
- product_price
- product_brand
- product_category
- product_quantity
- search_query
- order_id
- value
- property

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- currency
- np

2. Server Side Conversion Events

File: cartridges/int_pinterest_sfra/cartridge/models/pinterest/eventServer.js
API Docs: https://developers.pinterest.com/docs/api/v5/#operation/events/create

By default, these Pinterest properties are supported by the cartridge:

- event_id
- action_source
- event_time
- event_source_url
- partner_name
- language
- client_user_agent
- client_ip_address
- em
- fn
- ln
- ge
- db
- ph
- external_id
- ct
- st
- zp
- country
- np
- search_string
- value
- content_ids
- currency
- contents
- num_items
- order_id

NOTE: Client and server-side events currently have an event-id dependency. Hence, you need to enable/disable both these features together.

6.2.4 Catalog XML Feed Job

Catalog data generated for Pinterest API ingestion supports the default data and functionality of the SFRA site. This cartridge can be extended to support your site's unique data need in the following ways:

File: cartridges/int_pinterest_sfra/cartridge/models/pinterest/catalog.js
API Docs: https://help.pinterest.com/business/article/before-you-get-started-with-catalogs

By default, these Pinterest properties are supported by the cartridge:

- id

- title
- brand
- price
- sale_price
- description
- description_html
- image_link
- additional_image_link
- availability
- link
- mobile_link
- GTIN
- item_group_id
- mpn
- color
- size
- variant_names
- variant_values

7. Known Issues

- Sometimes the cartridge is not able to anticipate any custom alias during the domain claiming process.
  - Workaround: Go to Merchant Tools > Pinterest > Domain Verification and ensure you have all your domains claimed. we try to automatically claim the domains during the connection process. If there are domains that our cartridge could not claim because of custom URL mappings, please manually enter the domain URL in the input box and claim them.