



**int\_talkable**  
Salesforce Commerce Cloud  
Integration Guide

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### 1. Summary

Talkable is changing the way e-commerce companies acquire and retain customers, through one of the most powerful marketing tools—referrals. The company builds refer-a-friend programs that allow businesses to acquire new customers through the endorsement of their friends and family, shared via email, SMS, and other social channels.

This document describes how to implement Talkable cartridge into the Salesforce Commerce Cloud site. The Talkable cartridge is a self-contained cartridge that can easily integrate into any Salesforce Commerce Cloud project. Cartridge can be configured in the Business Manager and contains all elements necessary to perform a successful best practices implementation of Talkable.

After cartridge is deployed, configured and integrated with the storefront templates, customer will have all power of Talkable marketing programs applied to their site.

In order to use the Talkable integration, you will need to contact Talkable before installing. Please reach out to [sales@talkable.com](mailto:sales@talkable.com) for details.

## 2. Component Overview

### 2.1. Functional Overview

Talkable enables your Salesforce Commerce Cloud store to attract new customers by offering them special deals in exchange for sharing with their friends.

This cartridge provides links for them to share their purchase on Facebook, Twitter, and Email and encourages them to bring in new customers for you.

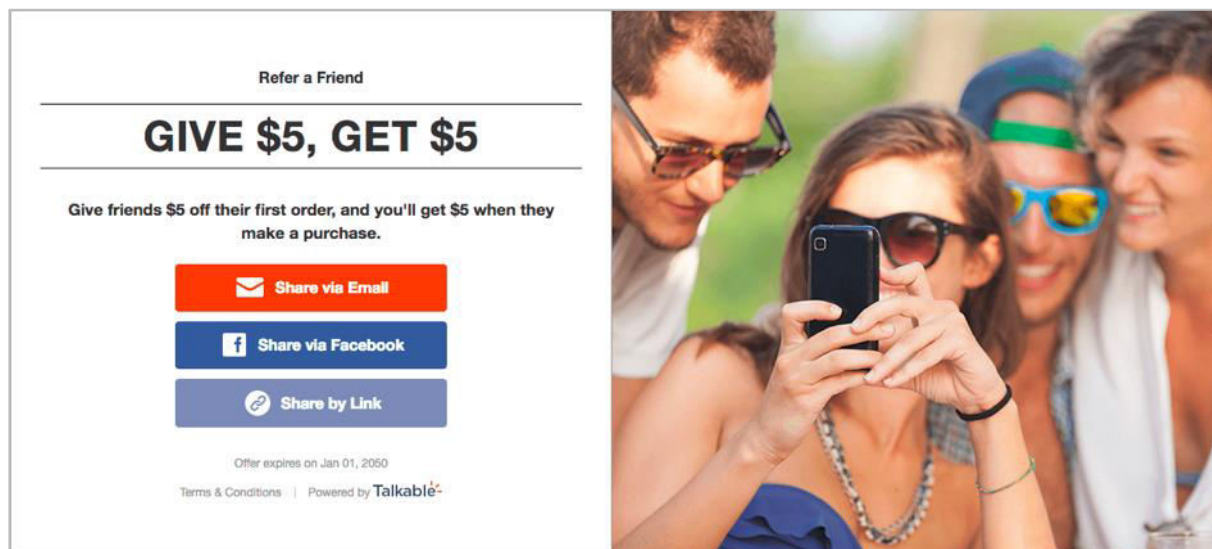
Using Talkable, you help your customers drive more referral sales per dollar than traditional marketing and advertising.

### 2.2. Use Cases

Talkable can be used to create referral marketing campaigns of different types.

#### 2.2.1. Invite Campaign

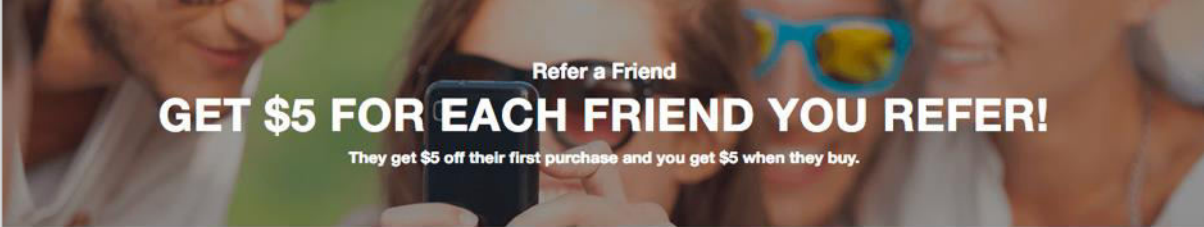
The Invite campaigns are very powerful and versatile. They increase the number of new customers by giving anyone an opportunity to invite their Friends from various high traffic locations on the website as well as outside the website. You can set up multiple Invite campaigns to run simultaneously.



*Invite Campaign.*

### 2.2.2. Advocate Dashboard Campaign

The Advocate Dashboard campaigns provide the Advocates a great insight on each of their shares as well as their associated rewards. The Advocates are motivated to share more to achieve more rewards and can make that directly from their Dashboards.



**Refer a Friend**  
**GET \$5 FOR EACH FRIEND YOU REFER!**  
They get \$5 off their first purchase and you get \$5 when they buy.

[Share](#) [Email](#) [Copy](#)

|              |    |                  |      |                  |   |                |      |
|--------------|----|------------------|------|------------------|---|----------------|------|
| Times Shared | 11 | Possible Rewards | \$20 | Friends Referred | 3 | Rewards Earned | \$15 |
|--------------|----|------------------|------|------------------|---|----------------|------|

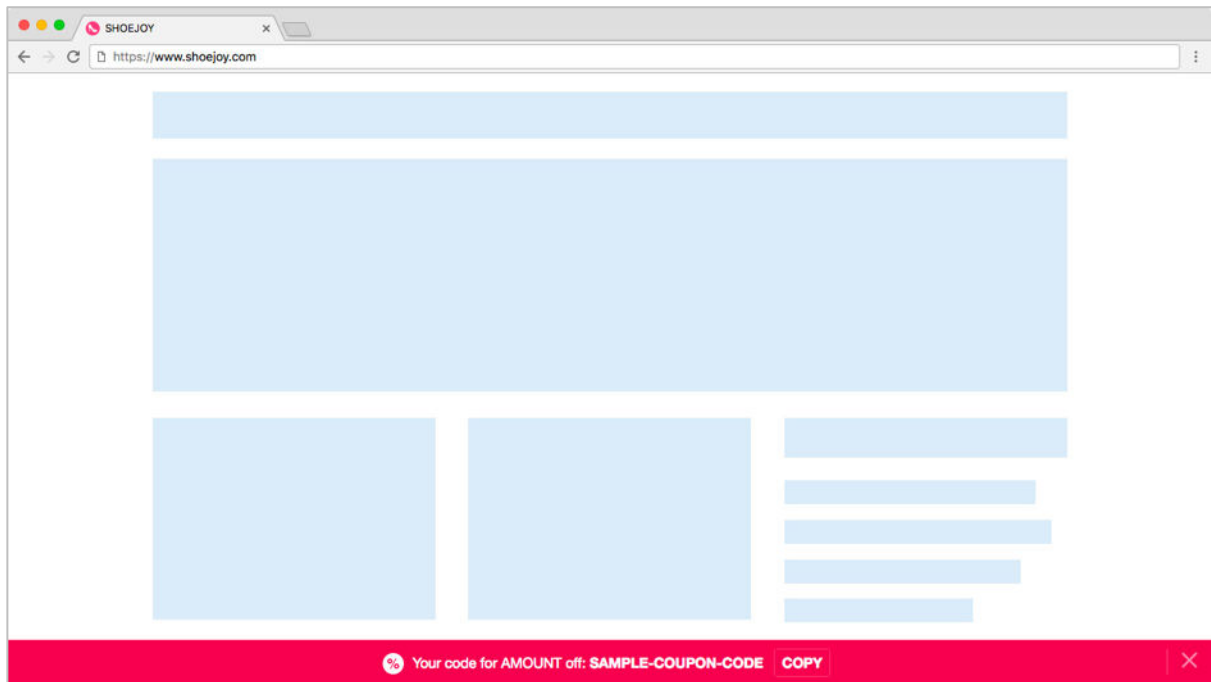
**Keep track of your shares & rewards** [Resend All](#)

|                                    |                      |                                |
|------------------------------------|----------------------|--------------------------------|
| friend+unopened@gmail.com          | Email sent, unopened | <a href="#">Resend</a>         |
| friend+opened@gmail.com            | Email sent, opened   | <a href="#">Resend</a>         |
| friend+clicked@gmail.com           | Email sent, clicked  | <a href="#">Resend</a>         |
| friend+no-expiration@gmail.com     | Email sent, unopened | <a href="#">Resend</a>         |
| friend+expired@gmail.com           | Email sent, unopened |                                |
| friend+new-offer@gmail.com         | Email sent, unopened | <a href="#">Send New Offer</a> |
| friend+expired-new-offer@gmail.com | Email sent, unopened | <a href="#">Send New Offer</a> |
| friend+reminded@gmail.com          | Reminded, unopened   | <a href="#">Resend</a>         |
| *****@gmail.com                    | Link shared, clicked | <a href="#">Send New Offer</a> |

*Advocate Dashboard Campaign.*

### 2.2.3. Reward Gleam Campaign

The Reward Gleam improves the on-site conversion rate by assisting Friends and Advocates in using their coupons to purchase. When the Friend or Advocate gets a reward and goes to your website, the Reward Gleam captures the coupon code and displays it in a highlight bar at the bottom of the page. This type of campaign focuses on both Friends and Advocates and can be the perfect addition to any of your other campaigns.



*Reward Gleam Campaign.*

### 2.2.4. Leaderboard Campaign

The Leaderboard turns your campaign into a competition and inspires the Advocate to share more to get to the top of the leaderboard. You can easily detect your top performers and have special rewards for them.

**Refer a Friend**

## SHARE FOR A CHANCE TO WIN \$500!

Enter for a chance to win \$500 by sharing with your friends. Your friends get \$5 off their first purchase and you get \$5 when they buy. The 3 people who refer the most friends gets exclusive pavel gear.

[Share](#) [Email](#) [Copy](#)

1 Share with your friends for a chance to win \$500 credit - just for sharing!

2 For each friend that makes their first purchase you get \$5 credit.

3 The top 3 referrers get exclusive pavel gear. The competition ends on Jan 01, 2050.

### Leaderboard

| Ranking | Referrals |
|---------|-----------|
| YOU - # | 0         |

You are in the top 3

Your record is:

Times Shared **11**

Possible Rewards **\$20**

Friends Referred **3**

Rewards Earned **\$15**

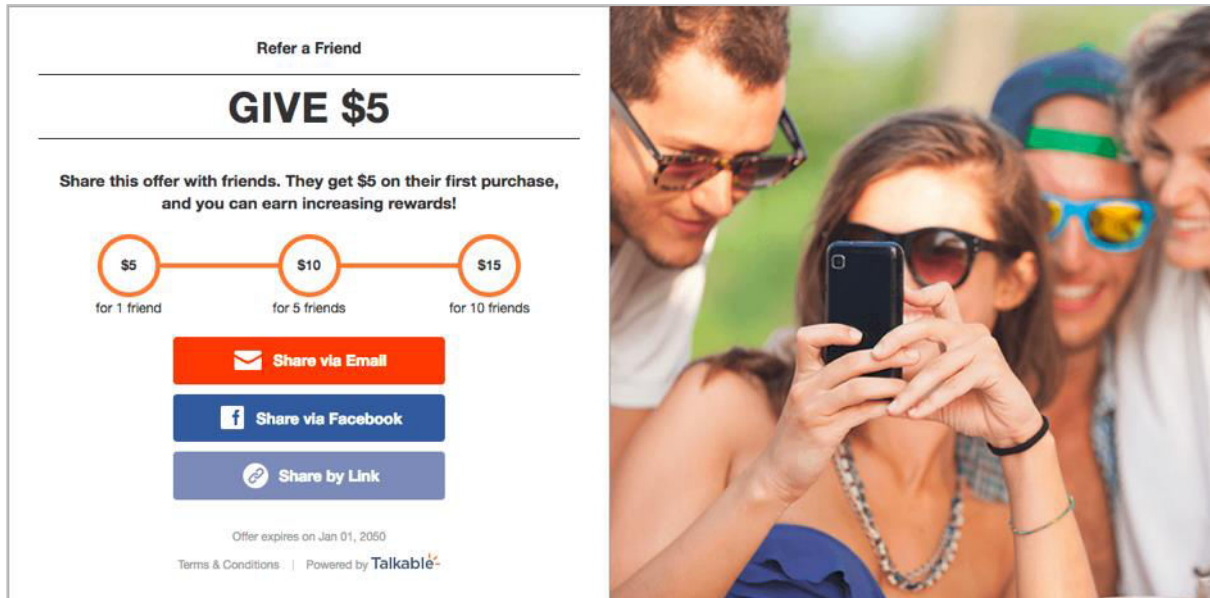
### Keep track of your shares & rewards

|                                    |                      |                                |
|------------------------------------|----------------------|--------------------------------|
| friend+unopened@gmail.com          | Email sent, unopened | <a href="#">Resend All</a>     |
| friend+opened@gmail.com            | Email sent, opened   | <a href="#">Resend</a>         |
| friend+clicked@gmail.com           | Email sent, clicked  | <a href="#">Resend</a>         |
| friend+no-expiration@gmail.com     | Email sent, unopened | <a href="#">Resend</a>         |
| friend+expired@gmail.com           | Email sent, unopened |                                |
| friend+new-offer@gmail.com         | Email sent, unopened | <a href="#">Send New Offer</a> |
| friend+expired-new-offer@gmail.com | Email sent, unopened | <a href="#">Send New Offer</a> |
| friend+reminded@gmail.com          | Reminded, unopened   | <a href="#">Resend</a>         |
| *****@gmail.com                    | Link shared, clicked | <a href="#">Send New Offer</a> |

Leaderboard Campaign.

### 2.2.5. Tiered Rewards Campaign

The Tiered Rewards campaign allows you to encourage the Advocates gradually by tiering the rewards. The Advocates are incited to continue sharing after they get the first reward in order to achieve the better one.



*Tiered Rewards Campaign.*



### 2.3. Limitations, Constraints

The installation of the Talkable cartridge does not grant the use of Talkable. Every store must register for a Talkable plan to gain access to cartridge functionality. Please reach out to [sales@talkable.com](mailto:sales@talkable.com) for details.

### 2.4. Compatibility

Cartridge designed for Salesforce Commerce Cloud API 17.5. Compatibility Mode: 16.2.

### 2.5. Privacy, Payment

Using Talkable binds you to the following [terms of service](#).

Please read our [privacy policy](#) to understand how Talkable protects the information it collects.

Payment details are discussed on a per client basis and can be determined by reaching out to [sales@talkable.com](mailto:sales@talkable.com)

## 3. Implementation Guide

### Prerequisites

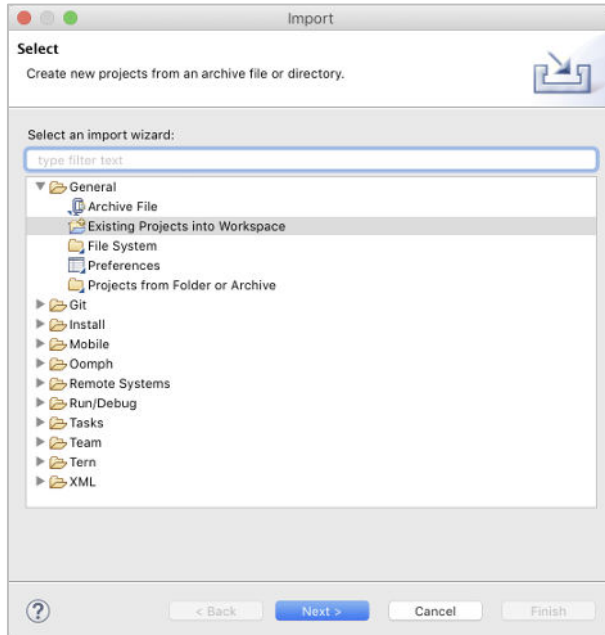
Before performing the steps in this document, ensure that you and your organization have satisfied the following criteria:

- You have reached out to Talkable and have obtained a Talkable Site ID to properly configure the Talkable cartridge. Talkable will create the required setup for the different campaigns (required by you) from Talkable's client admin. Talkable will provide you the login credentials for client admin, where you can see and manage the different settings related to the campaigns activated for you.
- You have downloaded and unzipped the Talkable cartridge ZIP file from Salesforce Commerce Cloud Marketplace or your Talkable Technical Consultant. The cartridge ZIP file contains the Talkable cartridge package, which resides in the folder `int_talkable`, as well as the file `talkable_settings.xml`, which contains Talkable custom site preferences.

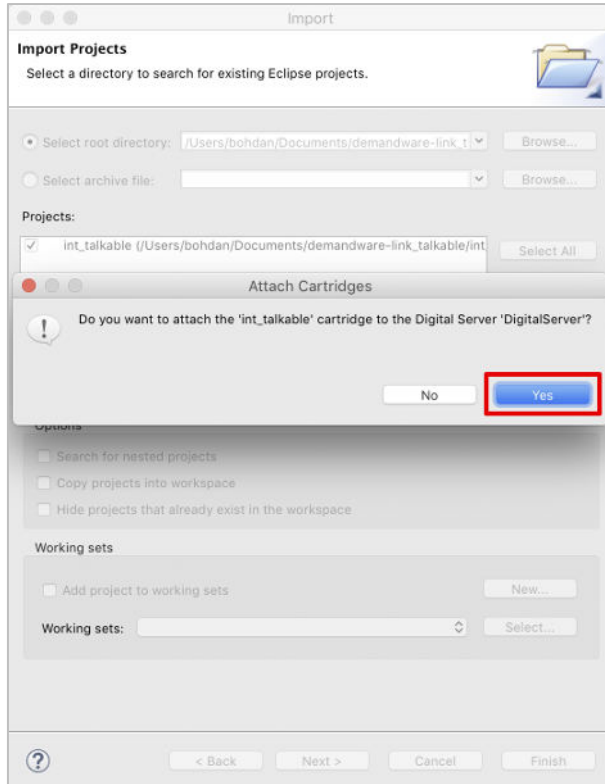
### 3.1. Setup

#### 3.1.1. Deploying cartridge to a sandbox

1. Import the Talkable cartridge to a workspace in Salesforce UX Studio.



2. Attach the Talkable cartridge to the Digital Server Connection.

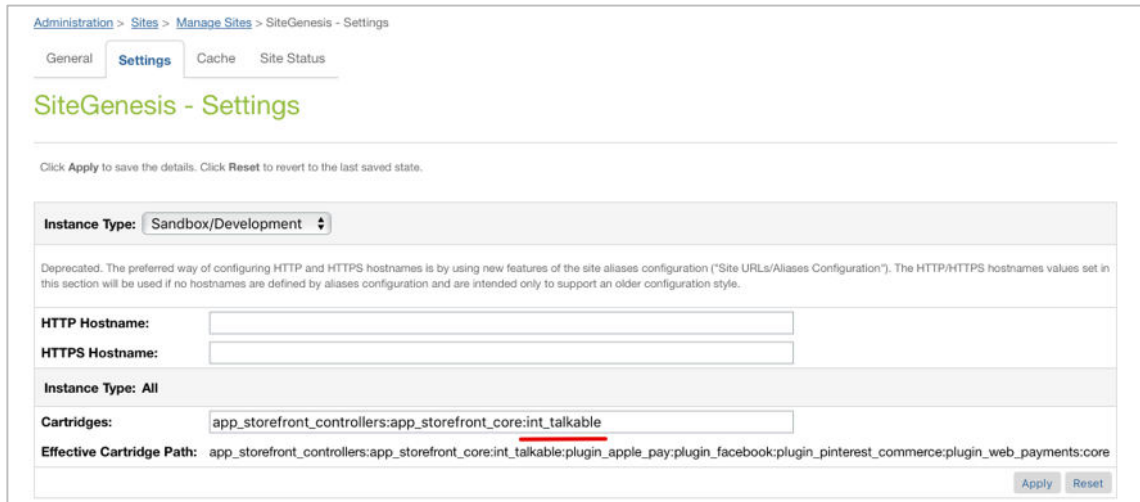


3. Wait until Studio completes workspace built and uploading source codes to a sandbox.

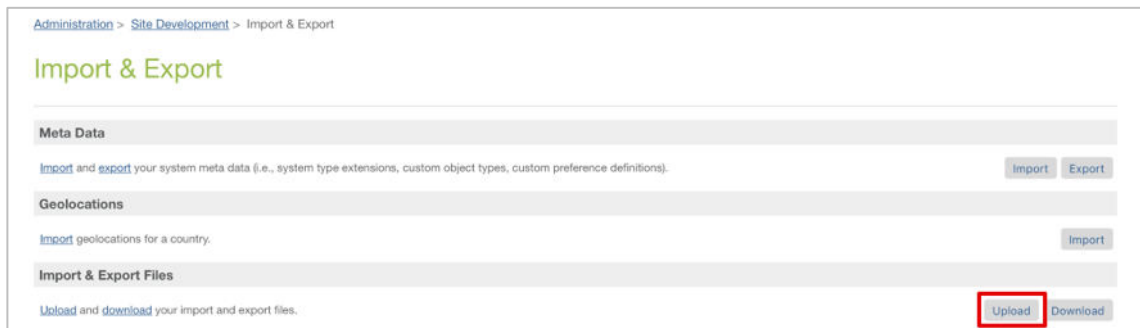
### 3.1.2. Sandbox setup

1. Go to Business Manager → Administration → Sites → Manage Sites. Select correct site, then select Settings tab. In cartridge path at the end write the following:

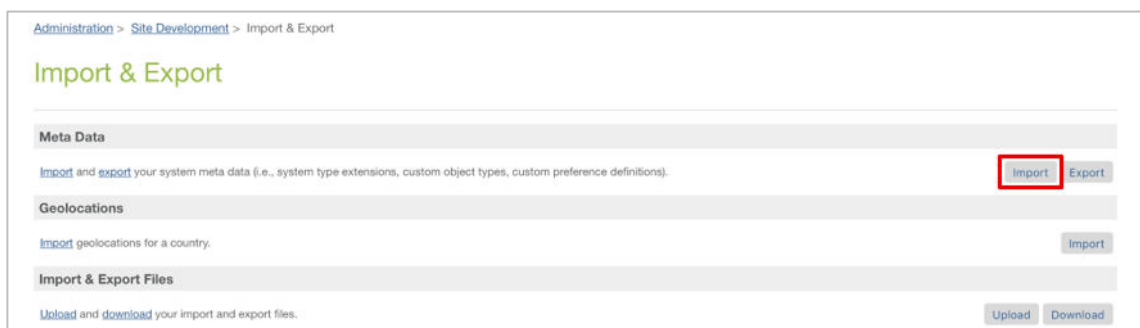
:int\_talkable



2. Open the folder where you extracted the Talkable cartridge ZIP file, and find talkable\_settings.xml in folder Metadata.
3. Go to Business Manager → Administration → Site Development → Import & Export. Click Upload button and select talkable\_settings.xml.



4. Click Import button and select talkable\_settings.xml.



5. Go to Merchant Tools → Site Preferences → Custom Preferences. Verify that Site Preferences group was created with ID – *talkable* and name – *Talkable*.

### 3.2. Configuration

This section describes configuration of the sandbox.

- Go to Merchant Tools → Site Preferences → Custom Preferences → Talkable.
  - Add site preference attribute – Talkable Site ID with provided Site ID from Talkable.
  - Enable attribute – Post Purchase Campaign.
  - Enable attribute – Invite Campaign.
  - Enable attribute – Advocate Dashboard Campaign.
  - Enable attribute – Floating Widget Popup Campaign.

Merchant Tools / Site Preferences / Custom Site Preference Groups /

**Talkable**

Instance Type: Sandbox

Search by IDs...

| Name                           | Value   | Default Value |                                   |
|--------------------------------|---|---------------|-----------------------------------|
| Talkable Site ID*              | <input type="text" value="your-talkable-site-id"/>                        |               | <a href="#">Edit Across Sites</a> |
| Post Purchase Campaign         | <input type="text" value="Yes"/><br>Shown on the Checkout Success page    | No            | <a href="#">Edit Across Sites</a> |
| Invite Campaign                | <input type="text" value="Yes"/><br>Shown on a specific page, e.g. /share | No            | <a href="#">Edit Across Sites</a> |
| Advocate Dashboard Campaign    | <input type="text" value="Yes"/><br>Added to the My Account section       | No            | <a href="#">Edit Across Sites</a> |
| Floating Widget Popup Campaign | <input type="text" value="Yes"/><br>Shown on every page                   | No            | <a href="#">Edit Across Sites</a> |

- Go to Merchant Tools → Site URLs → URL Rules, then select Pipeline URLs tab. Add the following rules:
  - share* resolves to *Talkable-Standalone*
  - referral-dashboard* resolves to *Talkable-Dashboard*

Merchant Tools > Site URLs > URL Rules > Pipeline URLs

General Settings Catalog URLs Content URLs **Pipeline URLs** URL Search Refinements

**Pipeline URLs**

Use the table below to define one or multiple aliases for any pipeline used in your storefront.

**Pipeline URL Settings**

**Append Trailing Slash to Pipeline URLs:** ☐ Append Trailing Slash to Pipeline URLs

**Perform Automatic Redirect:** ☐ Enable this to automatically redirect requests to the desired trailing slash configuration.

**Pipeline Aliases**

Alias or Pipeline:  Locale:  [Find](#)

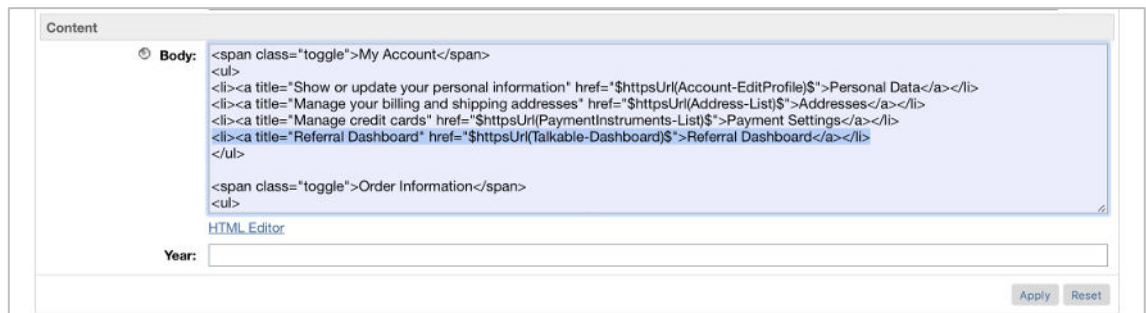
| Select All               | Alias              | Pipeline                        |
|--------------------------|--------------------|---------------------------------|
| <input type="checkbox"/> | referral-dashboard | resolves To Talkable-Dashboard  |
| <input type="checkbox"/> | share              | resolves To Talkable-Standalone |
|                          | New Alias:         | resolves To                     |

[Apply](#) [Delete](#)

3. For the Advocate Dashboard Campaign to be shown in the My Account section, a small change required in the *account-nav-registered* content asset.

- Navigate to Merchant Tools → Content → Content Assets.
- Search for the *account-nav-registered* content asset.
- Lock the content asset in order to be able to edit it.
- Go to the body attribute and add the following line to the list of My Account section (please also check the screenshot below):

```
<li><a title="Referral Dashboard"
href="$httpsUrl(Talkable-Dashboard)$">Referral Dashboard</a></li>
```



### 3.3. Custom Code

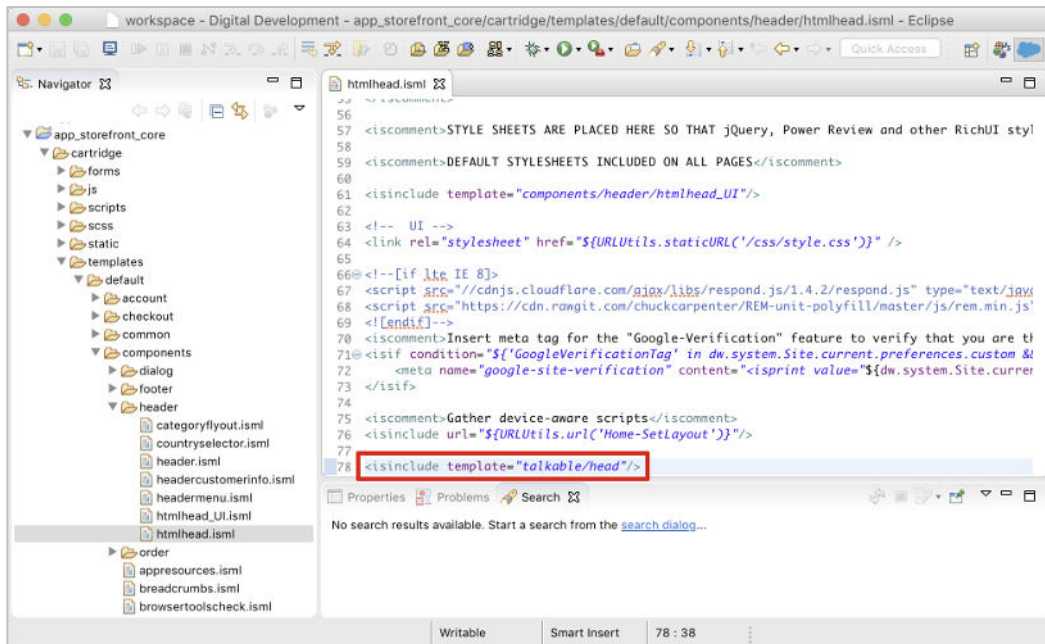
This section describes changes that should be made to a merchant storefront cartridge.

1. Find and open the below template:

*storefront/cartridge/templates/default/components/header/htmlhead.isml*

Paste code at the end:

```
<include template="talkable/head"/>
```

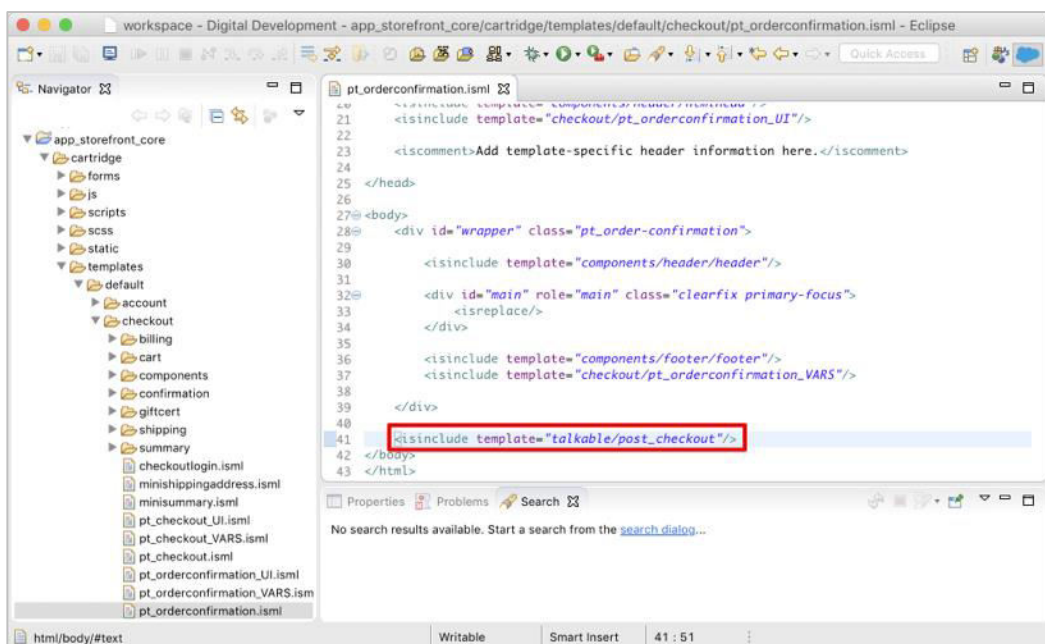


2. Find and open the below template:

*storefront/cartridge/templates/default/checkout/pt\_orderconfirmation.isml*

Paste code before the closing `</body>` tag:

```
<include template="talkable/post_checkout"/>
```



### 3.4. External Interfaces

Talkable integrates with Salesforce Commerce Cloud Platform through JavaScript calls to Talkable API. All outside traffic from Salesforce Commerce Cloud instance is handled by HTTPS protocol.

Talkable integration documentation – <http://docs.talkable.com/ecommerce.html>

### 3.5. Testing

For a complete list of test cases, please refer to the test cases document.

## 4. Operations, Maintenance

### 4.1. Data Storage

*Intentionally left blank.*

### 4.2. Availability

The Talkable platform is expected to be available 24/7. However, if something should happen and the Talkable does not respond, the user will not be able to see Talkable campaigns. On that time, the user will see a blank screen instead of Standalone and Advocate Dashboard campaigns. If there is a problem connecting to Talkable, the functionality and performance of your site will not degrade in any way.

### 4.3. Support

For technical support please contact your Talkable contact, or for cartridge specific questions you may email [support@talkable.com](mailto:support@talkable.com)

## 5. User Guide

### 5.1. Roles, Responsibilities

Store admin needs to follow setup instruction to add the Talkable cartridge, code, and configuration to make sure the integration will work properly. There are no recurring tasks that need to be fulfilled to set up the Talkable cartridge. As long as the configuration details are correct in your Site Preferences based on instructions in section 3.1, 3.2 and 3.3 that is all that needs to be done.

### 5.2. Business Manager

*Configuration options described above, in 3.2.*

### 5.3. Storefront Functionality

*Intentionally left blank.*

## 6. Known Issues

*Intentionally left blank.*

## 7. Release History

| Version | Date         | Changes         |
|---------|--------------|-----------------|
| 17.1.0  | June 9, 2017 | Initial release |