# Talon.One Engagement SFRA Integration

Version 6.1.0



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## 1. Summary

Talon.One is a cloud-based Promotion Engine designed to allow expanding enterprises to create, manage and track coupon codes, discounts, referral rewards and loyalty programs all in one holistic platform. Talon.One is a platform that allows you to create highly customizable promotional campaigns thanks to the *Campaign Manager*.

The centralized platform enables users to create targeted promotions on a very granular level to improve customer experience.

With Talon.One you instantly unlock a whole host of powerful features including: Coupon generation, coupon tracking, referral management, automated discounts and notifications, loyalty program backend logic, default campaign budgets, and single sign-on.

The full features are too extensive to list, but with this customers can trigger any promotion solution they like based on customer profile data, interactions, location, device and segment data they obtain through 3rd parties.

Talon.One allows enterprises to run loyalty programs based on points, memberships, and multi-tiered KPIs, personalize each incentive/reward per customer attribute, and utilize the earn and burn module to buyers' wallet spend. It comes with an application programming interface (API), which allows businesses to integrate the platform with several third-party systems such as Salesforce, and more.

Platform relies on **Applications** inside the Campaign Manager. They are the receiving end of the integration layer and typically represent a region where you do business..

Each Application contains **campaigns**. These are your promotional campaigns, based on your marketing decisions. They are defined by budgets, start and end dates, attributes, and the promotion logic.

The logic of your campaign is implemented by **rules**. They usually have a set of conditions and effects such as *check if the coupon code is valid*, or *generate a referral code*..

#### 2. Overview

The Talon.One promotion cartridge enables commerce cloud to integrate with the Talon.One promotion service. The purpose of the document is to guide through an easy installation of Talon.One cartridge onto a commerce cloud store.

The integration is based on the SFRA demo store, provided by SFCC.

Note:- Our assumption is that we won't be using any SFCC coupons, promotion & campaigns.

The integration consists of an archive with contents as described in the below table.

Name	Purpose
cartridges	Contains Talon.One integration cartridges
cartridges\int_talonone_sfra	This cartridge contains the SFRA specific changes required for Talon.One integration
cartridges\int_talonone	This cartridge contains the API calls for Talon.One integration and common code
Cartridges\bm_talonone	This cartridge references all the changes done on BM Talon.One transactions and is included in the BM cartridge path.
metadata	Contains system object extensions and configurations required for the integration
documentation	Contains this document "Talonone SFRA Integration Document"

## 2.1 Functional Overview

Talon.One Key Features:-

- Activity Dashboard
- Campaign Management
- CRM
- Customer Activity Tracking
- Customer Profiles
- Discount Management
- Referral Management
- Loyalty Cards
- Loyalty Program
- Referral Tracking
- Reporting/Analytics
- Third Party Integrations
- Rewards Management

#### **Integration API**

Use the Integration API to send external information to the Talon. One Rule Engine or to retrieve data in high-load environments. It's the main API for all integration use-cases.

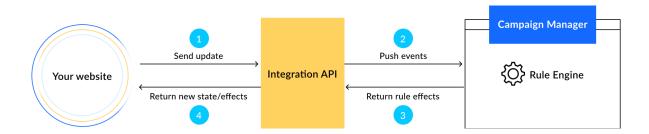
Typical use cases are:

- Sharing order/cart data, such as cart items, delivery address or payment information.
- Get promotion campaign effects.
- Sharing customer data, such as total sales or loyalty memberships.
- Getting customer-related data.

Here is a usual example of workflow with the Integration API:

- 1. Your webshop sends a request via the Integration API.
- 2. The request is transformed in event and sent to the Rule Engine.
- 3. The Rule Engine uses this event to find the rules that match the current event.
- 4. The Rule Engine returns the effect(s) of the matching rules to the integration layer.
- 5. The integration layer applies the effect(s) as needed.

Represented visually, the relation between the Campaign Manager, your webshop, and the Rule Engine is as follows:



The only coupling of your integration with campaigns is through the Rule Engine: the integration must send the attributes that the Rule Engine requires.

#### 2.2 Use Cases

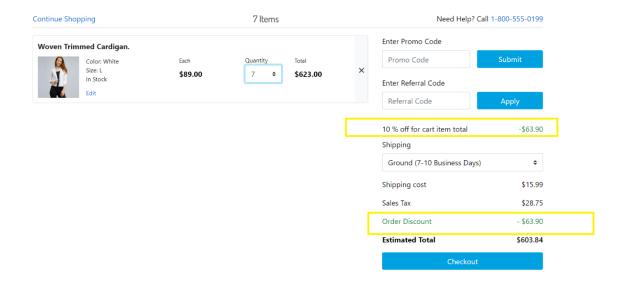
#### 2.2.1 Discount

The effects happen when you use a Discount effect.

## 2.2.1.1 SetDiscount (Order Level Discount)

It indicates that a discount should be set on the total shopping cart value of the current order with the given label and amount.

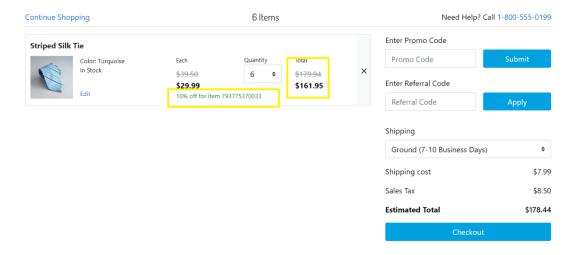
This discount should overwrite any existing discount with the same name. The most recent integration state update always returns the latest values for all effects, effectively overwriting any previous effects.



## 2.2.1.2 SetDiscountPerItem (Product Level Discount)

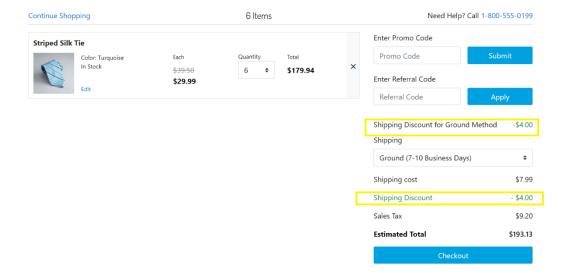
This effect schema is returned when you use the Discount individual items or Discount individual items pro rata effect in a rule.

It indicates that a discount per item should be applied on the specific item specified in the effect.



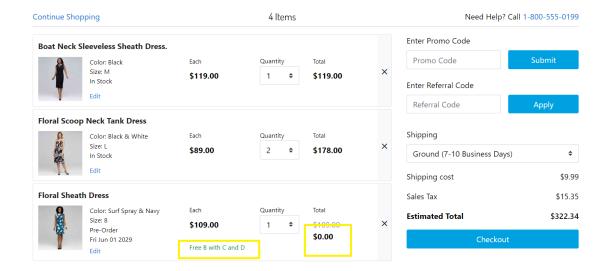
## 2.2.1.3 SetDiscountPerAdditionalCost (Shipping Level Discount)

It indicates that a discount that should be applied on a specific additional cost.



#### 2.2.1.4 addFreeItem

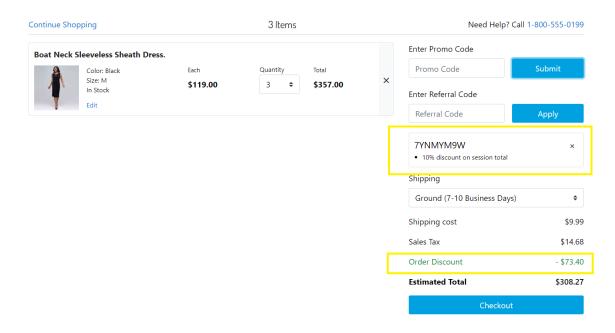
It indicates that a free item should be added to the shopping cart in the current session.



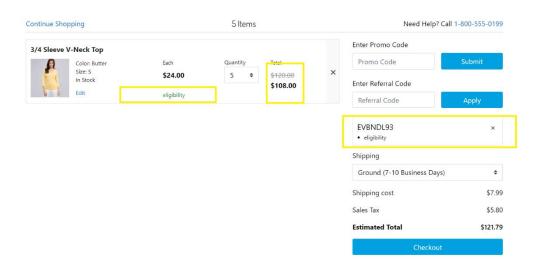
## 2.2.2 Coupons

The effects happen when you use a Discount effect with valid coupon codes

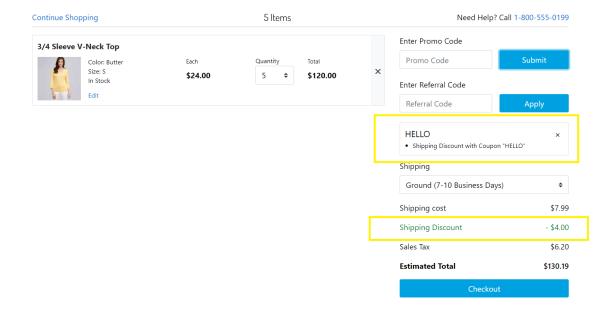
## 2.2.2.1 SetDiscount (Order Level Discount)



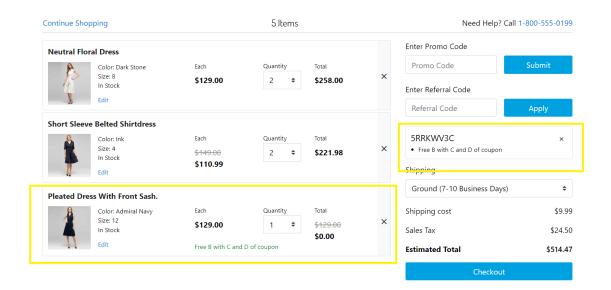
## 2.2.2.2 SetDiscountPerItem (Product Level Discount)



## 2.2.2.3 SetDiscountPerAdditionalCost (Shipping Level Discount)



#### 2.2.2.4 addFreeItem

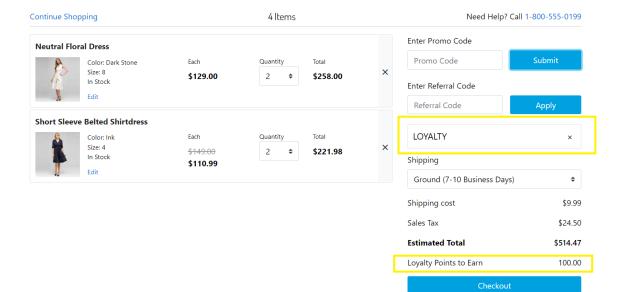


## 2.2.3 Loyalty

## 2.2.3.1 AddLoyaltyPoints

It indicates that a defined amount of loyalty points was successfully added to the customer's loyalty wallet.

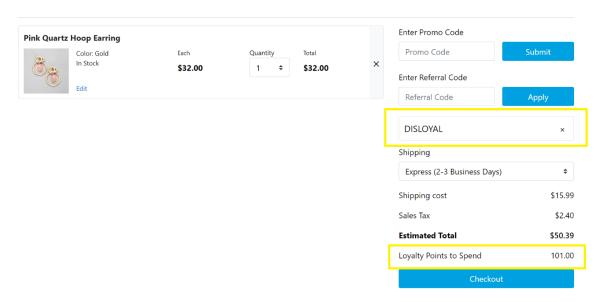
The points only persist when the session is closed.

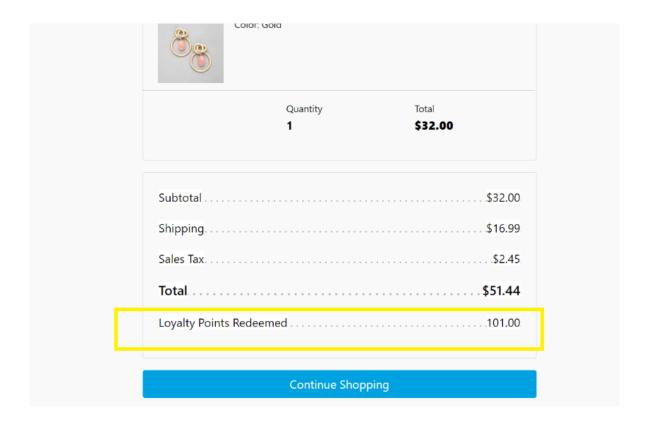


## 2.2.3.2 DeductLoyaltyPoints

It indicates that the loyalty points a customer wanted to spend got subtracted from their loyalty wallet.

The points only persist when the session is closed.





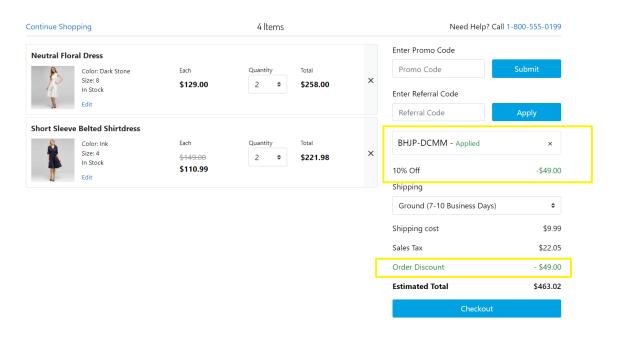
#### 2.2.4 Referral

Referral codes are intended for your customers to share with other people so that they too become customers. Each referral code is related to an advocate and their friend:

- Advocate: The customer who invited their friend via a referral code.
- Friend: The person who receives the code from an advocate.

When a referral code is successful, the configured promotion will be applied to that referral.

#### 2.2.4.1 SetDiscount



2.3 Limitations, Constraints

N/A

## 2.4 Compatibility

Available since Commerce Cloud Platform Release 22.7, SFRA 6.1.0

The cartridge is available for installations on storefronts that support both Controller and SFRA implemenations.

2.5 Privacy, Payment

N/A

## 3. Implementation Guide

## 3.1 Setup of Business Manager

This guide requires that the latest SFRA code is uploaded alongside the SFRA latest reference applications.

The prepared test data setup is using the RefArchGlobal reference site as a base.

The Talon.One LINK Cartridge contains several cartridges that are required for full functionality. Additionally, Controller and SFRA support is broken out into two separate cartridges, thereby facilitating the installation and use of one or the other models.

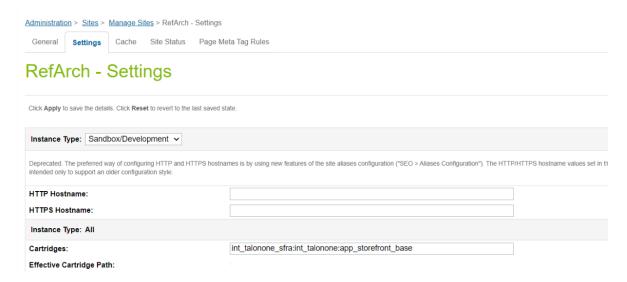
Import all three cartridges into UX studio and associate them with a Server Connection.

#### Site Cartridge Assignment Install the cartridge.

- 1. Navigate to Administration > Sites > Manage Sites
- 2. Click on the Site Name for the Storefront Site that will add Talon. One Engagement Functionality
- 3. Select the "Settings" tab
- 4. For SFRA "int\_talonone\_sfra: int\_talonone" need to be added to the cartridge path,

i.e. SFRA-based Site Path:

#### int\_talonone\_sfra:int\_talonone:app\_storefront\_base

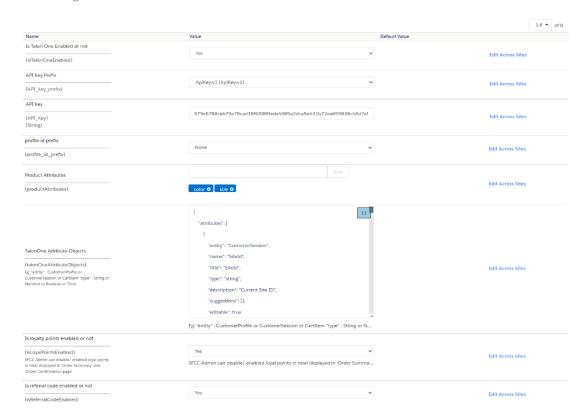


5. Repeat steps 2 – 4 for each Storefront Site where Talon.One Engagement will be implemented.

#### Metadata import

- 1. Navigate to the metadata folder of the project and open the site template folder.
- 2. Open the sites folder and edit the 'siteIDHere' folder to the site ID of the site you want.
- 3. Add a folder for each site you need Talon. One Engagement on.
- 4. Navigate to Administration > Site Development > Site Import & Export
- 5. Zip the Talon.One Engagement\_site\_template folder and import it.

## 3.2 Configuration

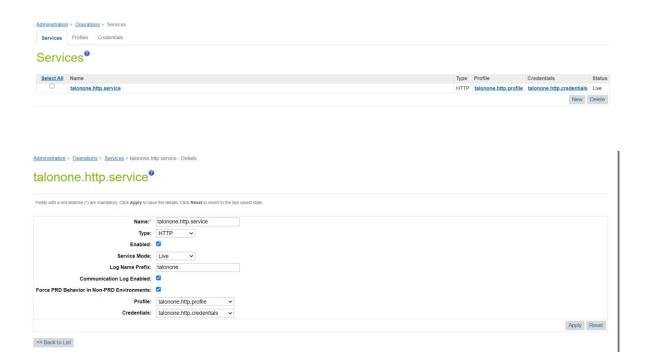


## 3.2.1 Service configuration

The initial configuration was imported from services.xml file included in the metadata folder.

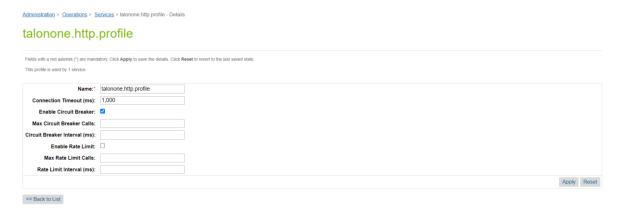
Go to: Administration  $\rightarrow$  Operations  $\rightarrow$  Services

- You would see the service with name **talonone.http.service**
- You would see the linked services profile: talonone.http.profile
- You would see the linked services credentials: talonone.http.credentials



Service's profile used for configuration of general connection properties.

- Go to: Administration → Operation → Services → Profiles tab
- You would see the profile with name talonone.http.profile



Service's credentials used for authentication to the Talon. One: url to be added, if needed.

- Go to: Administration → Operation → Services → Credentials tab
- You must see in credentials list credentials with name talonone.http.credentials
- Open talonone.http.credentials and setup the URL fields as provided by the Talon.One Solutions team. Talon.One is configured with only the URL and no username or password.
   URL: Talonone URL eg:- https://tryzens.europe-west1.talon.one/v2.



## 3.2.2 General configuration

Talon.One configuration values should be set properly in the Business Manager, so that the API requests are made successfully.

## 3.2.2.1 SitePreferences

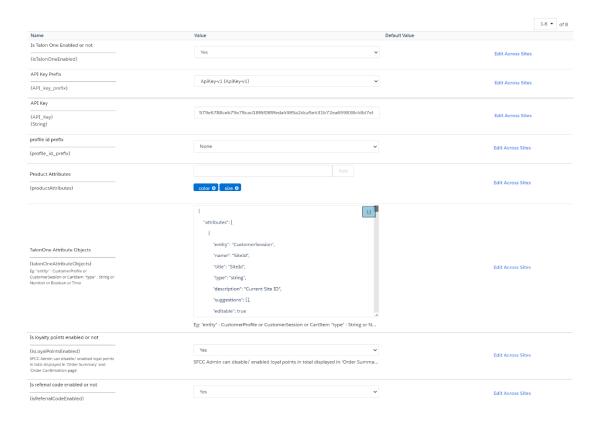
The properties to enable the functionality are on the main level in Site Preferences.

- Navigate to Site > Site Preferences > Custom Site Preferences.
- Select the Talon One Configuration preference group.

Full list of the available site preferences can be seen below:

Configuration	Purpose
isTalonOneEnabled	Used to Enable/Disabled Talon.One for the site.
API_key_prefix	The API prefix value with corresponding version, we have got from Talon.One ApiKey-v1

API_Key	Add the Talon.One API key, which we have created from Talon.One Campaign Manager as provided by the Talon.One team
profile_id_prefix	Prefix to identify if it's a test, or production site Eg:- test_RefArch, or prod_RefArch
productAttributes	Add the supporting attribute available for products. Eg:- color, size.
talonOneAttributeObjects	List of Attributes needed to be created in campaign manager
isLoyalPointsEnabled	Based on the value, decides whether or not to display loyalty points on the site.
isReferralCodeEnabled	Based on the value, decides whether or not to display referral code block on the site.



## 3.2.2.2 System Objects

#### **Basket**

Attribute	Purpose
talononeRejectedFreeItem	List of all Talon.One Rejected Free Items
referralCode	Contains the entered referral code
talononeCouponCodes	Contains all the coupon codes , which are acceptable by Talon.One

#### Order

Attribute	Purpose
customerProfileID	Talon.One customer profile id
customerSessionID	Talon.One customer session id
talononeRejectedFreeItem	List of all Talon.One Rejected Free Items
talononeCouponCodes	Contains all the coupon codes , which are acceptable by Talon.One
referralCode	Contains the entered referral code

## PriceAdjustment

Attribute	Purpose
isTalonOneAdjustment	Is set true when a Talon.One promotions are updated against the lineitem priceadjustment
isTalonOneFreeItem	Is set true when a Talon.One promotions has free item and are updated against the lineitem priceadjustment
talonOneFreeItemQty	Contains the number of free item qty
talonOneLineItemUuid	Line Item Unique Id
talonOnePriceAdjustment	Contains the unique adjustment Id
talonOnePromotionRuleName	Promotion Rule Name

#### ProductionLineItem

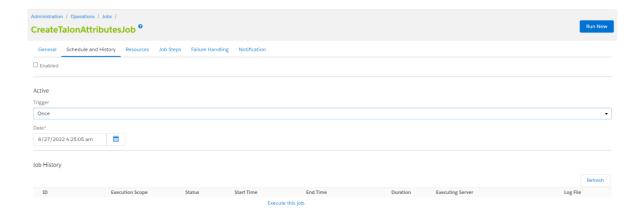
Attribute	Purpose
hasTalonOneFreeItem	Is set true when a Talon.One promotions has free item

#### 3.2.2.3 Jobs

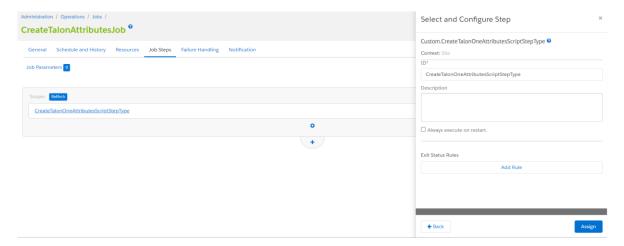
The job iterates over the configured preference attributes value of "talonOneAttributeObjects" to create custom attributes on campaign manager, if attributes are not created yet.

It's a one time execution. Until if any new custom attributes are needed or to be configured.

**Note:-** This job must be executed each time a new sitepreference attribute is added in order to create the corresponding Campaign Manager attribute.



## **Jobsteps**



## 3.2 Extended Controllers

Controller	Start Node	Remarks
Account.js	SubmitRegistration, Login, Save Profile	Extended to call customer profile API calls
Cart.js	AddCoupon, RemoveCouponLineItem, RemoveProductLineItem, UpdateQuantity, Show, AddReferral	Extended to update the calculate depends on the Talon.One customer_sesssion API response
Checkout.js	Begin	Extended to update Loyalty points based on the Talon.One customer_sesssion API response
CheckoutService.js	PlaceOrder, LoginCustomer	Extended for Closing the current Talon.One session ID when an order is placed. Extended to Create/Update customer profile API calls
Order.js	CreateAccount, Confirm	Extended to Create/Update customer profile API calls. Extended to update Loyalty points based on the Talon.One customer_sesssion API response

Template	Remarks
cart.isml	To display an error message, when the configured
	Talon.One response has free item and is in OOS.
	Also, to display referral points, if the Talon.One response
	has any referral points.
cartcouponDisplay.isml	To display the coupon codes when a coupon code is in
	applied/ not applied status as per Talon.One responses.
cartRemoveReferralModal.isml	To remove the referral codes when a referral is removed as
	per Talon.One responses.
cartTotals.isml	To display referral points, if the Talon.One response has any
	referral points.
referral.isml	Used to display the new field for referral code entry

#### 3.4 External Interfaces

All requests are done through Talon. One API's with the API key Provided by Talon. One.

The full reference guide, along with the resource structure for requests & responses can be found in the portal

https://docs.talon.one/docs/dev/integration-api/overview/

https://docs.talon.one/docs/dev/integration-api/api-effects/

#### 3.4.1 Dry Request

A dry request is a test request that is checked by Talon. One but that is not executed.

To mark an Integration API request as dry, add the optional query parameter dry=true. No data about this request and its response is stored in Talon.One's database.

Also, the full reference guide for dry request can be found in this portal:-

https://docs.talon.one/docs/dev/integration-api/dry-requests/

Note:- No changes related to this are handled as part of the cartridge.

#### 3.4.2 Return Cart Items

For this, a new return request for the specified cart item is required. The return request can be invoked to automatically switch the session state from closed to partially returned or cancelled.

Also, the full reference guide for return item can be found in this portal:-

https://docs.talon.one/integration-api/#tag/Customer-sessions/operation/returnCartItems

Note:- No changes related to this are handled as part of the cartridge.

#### 3.4.3 Service Down

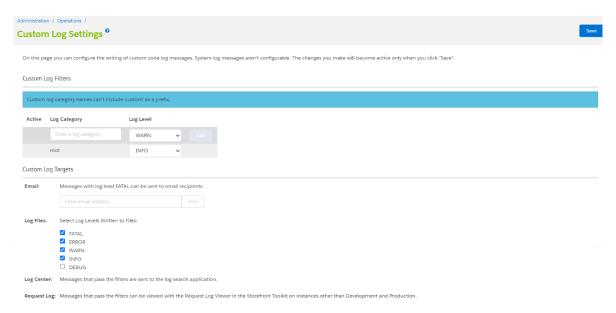
In any case, if the services are unavailable, we will not handle any discounts. If a discount has already been applied, it will not be removed, and if no discount has been applied, it will remain the same. The Talon.One service and custom logs would contain information about the service being unavailable.

#### 4. User Guide

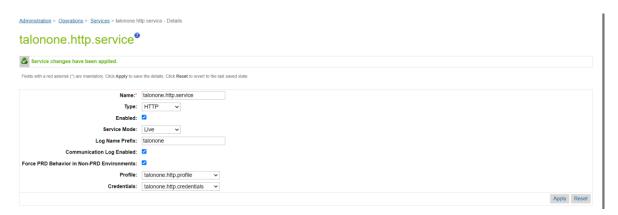
#### 4.1 Logs

Configuration to view Talon.One logs:- On Administration → Operations → Custom Log Settings.

Ensure that the Log Category to be leveled as DEBUG or INFO & Log files are checked with FATAL, ERROR, WARN, INFO as shown below:-



To view the request & response in service log, ensure that the communication Log Enabled is checked on service configurations.

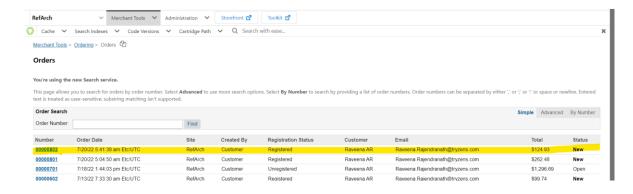


The integration includes the following logs:-

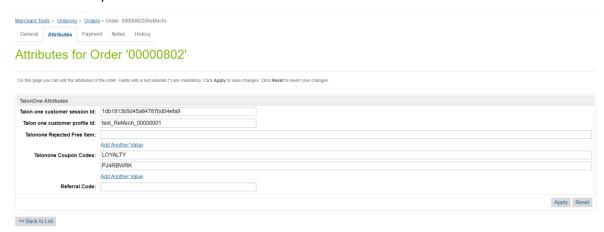
- Service communication logs starts with "service-talonone-\*\*\*". These logs contain every request and response to the Talon.One.
- Custom error info are logged under "custom-talonone-\*\*\*", files depending on the case.

The newly created order can be the viewed in Business Manager:

Merchant Tools → Ordering → Orders



Talon.One Session Id, Profile Id, Rejected Free Items, Applied Coupon Codes, & Applied Referral Code can be inspected in the Attributes tab of the order:



## 5. Known Issues

The LINK Cartridge has no known issues.

## 6. Release History

Version	Date	Changes
21.10.0	2021-10-25	Initial release