SITECORE®

Getting Started with Sitecore Discover

Sitecore Discover

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Chapter 1 Introduction

Welcome to Sitecore Discover! We are excited that you've decided to come on board. When you succeed, so do we.

There are **three main integration points** required to integrate Discover's AI-powered, merchandiser-controlled experiences with your site (or any other online touchpoint with your shoppers):

1. Product Information
2. Visitor Information
3. Personalization Experiences integration
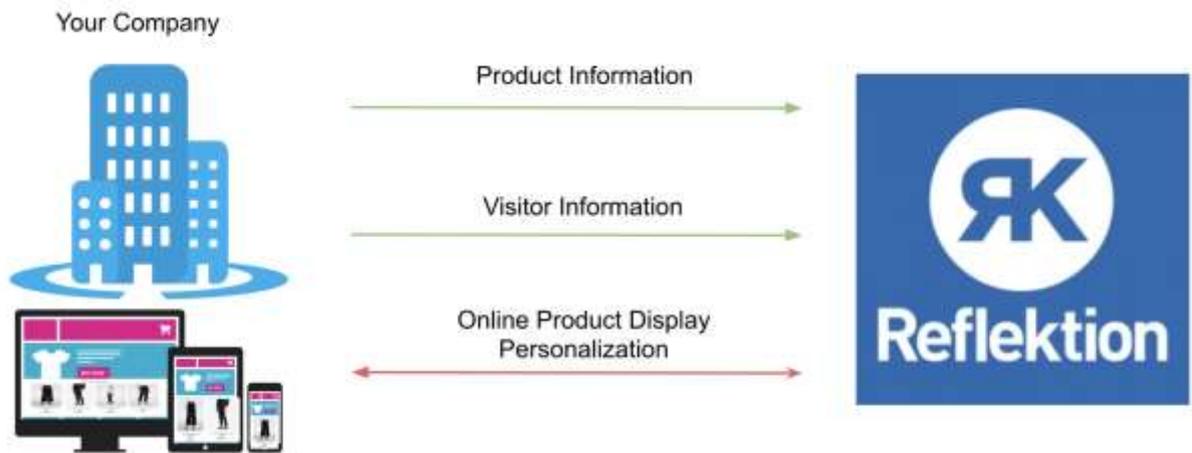
Chapter 2 Getting Started

After subscribing to Sitecore Discover, you and your team will be put in touch with your assigned Sitecore Discover Integration team member, who will guide you through the integration process. The following are the main steps and tasks that you and Sitecore perform to implement any Discover experience. Additional steps might be required depending on the modules you have subscribed to.

To see an example timeline of the tasks needed from both sides to complete your integration, refer to the Appendix.

Note:
This document contains some hyperlinks to resources only available to Sitecore Discover users.

2.1 Visitor information

Visitor information consists of website visitor tracking (visitor runtime identification). It is essential for everything that Discover does, like personalization, rules targeting, data set generation, and analytics. Apart from widget events, visitor tracking is mainly automated by Discover through the installation of our beacon.

2.1.1 Sitecore Discover Beacon

The Discover Beacon consists of a single line of JavaScript configured specifically for your account that tracks visitor identity and page views. If you are working on a mobile native app or prefer to limit beacons on your site, you may also, or instead, use Sitecore Discover Events API.

Before installing your beacon, you must first ensure that Intelligent Tracking Prevention (ITP) and ad blockers see it as a first party to your site. To do this, you set up a subdomain for Discover to track your visitors on your behalf.

You can obtain the Beacon path directly from the Customer Engagement Console (CEC) under **Developer Resources > API Access,** alongside all other integration information.
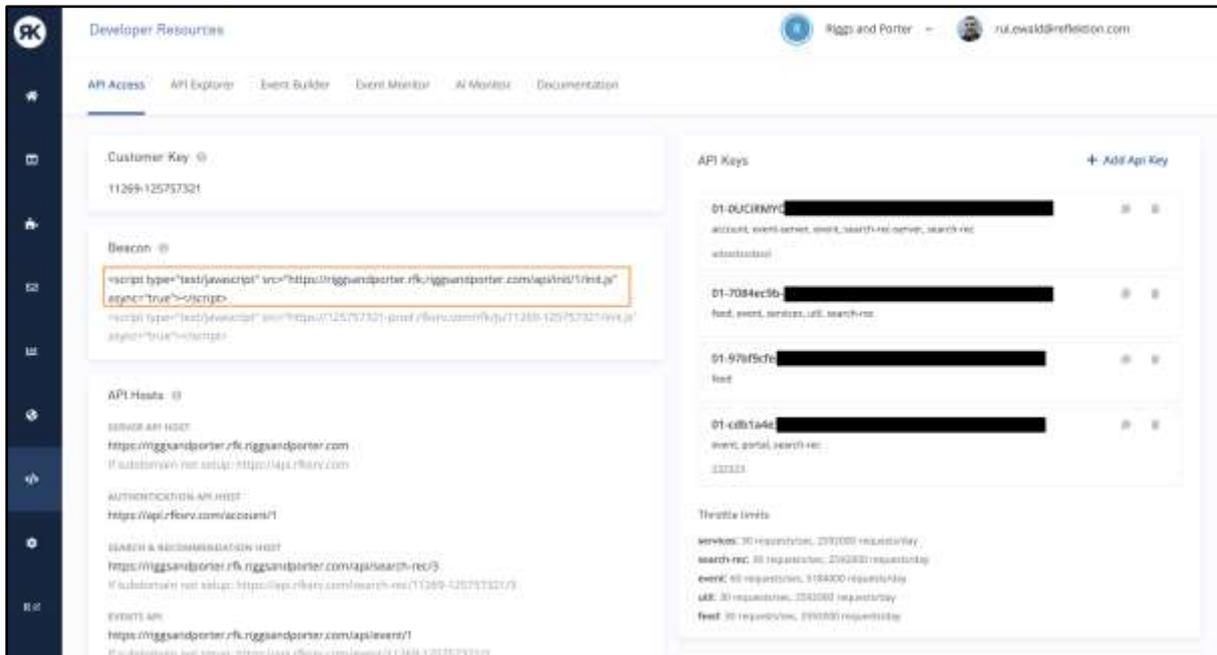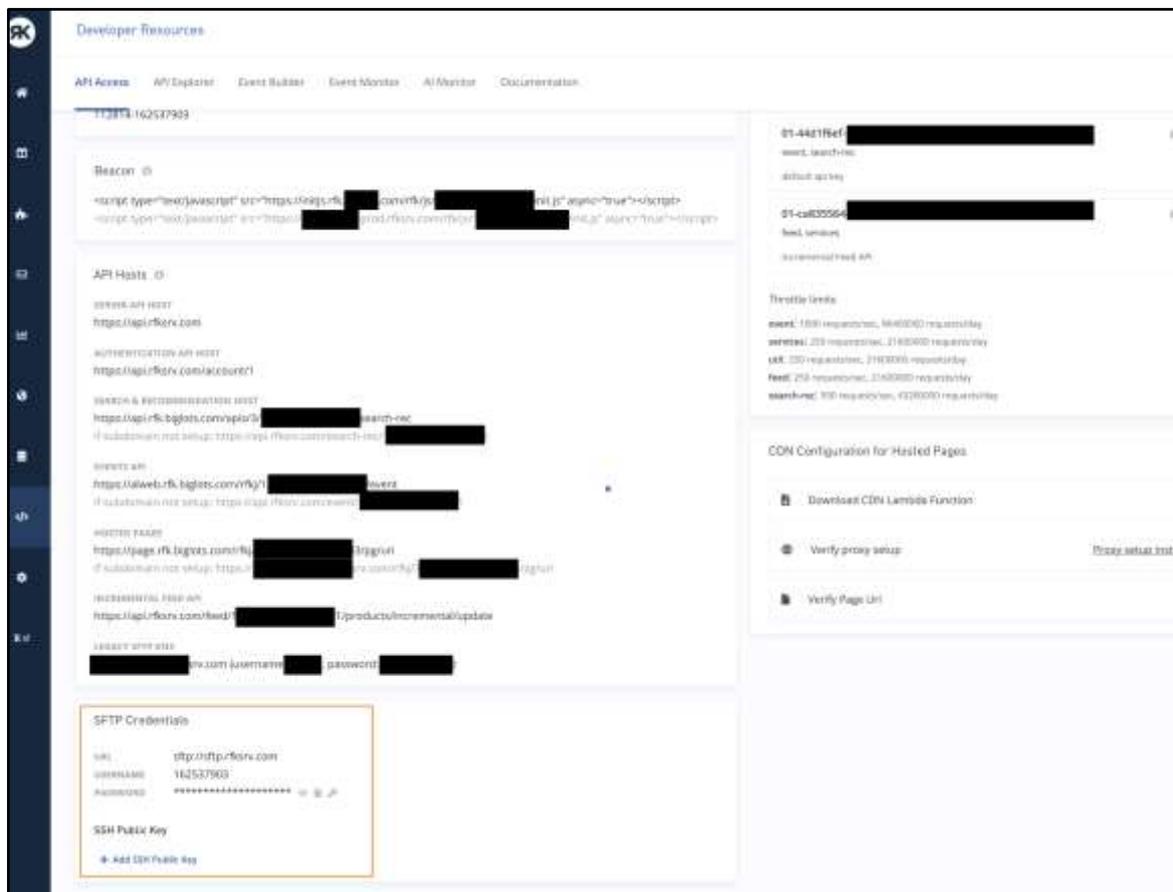
2.2 Product Information

At a minimum, product Information consists of product and category data feeds (`.txt` files) delivered to Discover via SFTP on a recurring basis. The data must conform to these specifications. You might additionally:

- Integrate with our Incremental Feed API for more timely updates to existing products in between full feed runs.

- Preload product performance before going live by providing a one-time Sales file. This provides Discover's AI with product rankings and co-purchasing information.

- Pass addition information that enables advanced use cases for B2B, Buy Online Pickup in Store (BOPIS) Timed Product Availability, Fitment Compatibility, and Multi-Locale support .

You can obtain SFTP details in the Customer Engagement Console (CEC), under **Developer Resources > API Access** alongside all other integration information.

2.2.1 Widget and Funnel Events

For most widgets except Preview Search, Widget and Funnel events consist of:

1. Widget appear

2. Widget click

3. Add to cart

4. Order

These events are streamed into the Discover platform and provide the intelligence that Discover needs to understand visitor affinities, then personalize the next set of things they see. If a widget is integrated via a JS component method (see integration methods), you do not need to publish Widget Appear and Widget Click events for that widget as those are already handled by the JS component. The full Sitecore Discover Events Specifications is available here.

These events also power the Discover's suite of pre-built cross-correlational analytics that empower your business teams with insights that only Discover is capable of unveiling.

2.3 **Personalization Experiences Integration**

Personalization Experiences Integration refers to the process of hooking up online experiences to Discover, which allows you to benefit from the scale that only AI can provide and present the right products for the right people at the right time. Discover should be used everywhere merchandising is displayed, as every touchpoint feeds common visitor and product profile databases. Here are some of the most common experiences that you might choose to use Discover for:

Discover Module	Experiences
Preview Search	Visual Autocomplete
Full Page Search	Full Page Search
Pages	Landing Pages
	Product Listing Pages
Recommendations	Product Details Page Recommendations
	Collection Pages Recommendations
	Home Page Recommendations
	Cart Page Recommendations
	No Results Recommendations
	Discover Your Like
	Just For You
Promotional Email	Promotional Email Recommendations
Content Personalization	Personalized Banners and HTML blocks

When your account is created, all the typical experiences for the modules you have subscribed to are pre-configured in CEC.

Choose one of the following integration methods for each of your experiences (except Promotional Emails). For any Discover personalization experience integration method to work, you must have completed integration steps for Visitor Information and Product Information.

2.3.1 Integration methods

Sitecore Discover provides the following integration methods:

- Sitecore Discover API

- Discover JS component
- Hosted Pages:
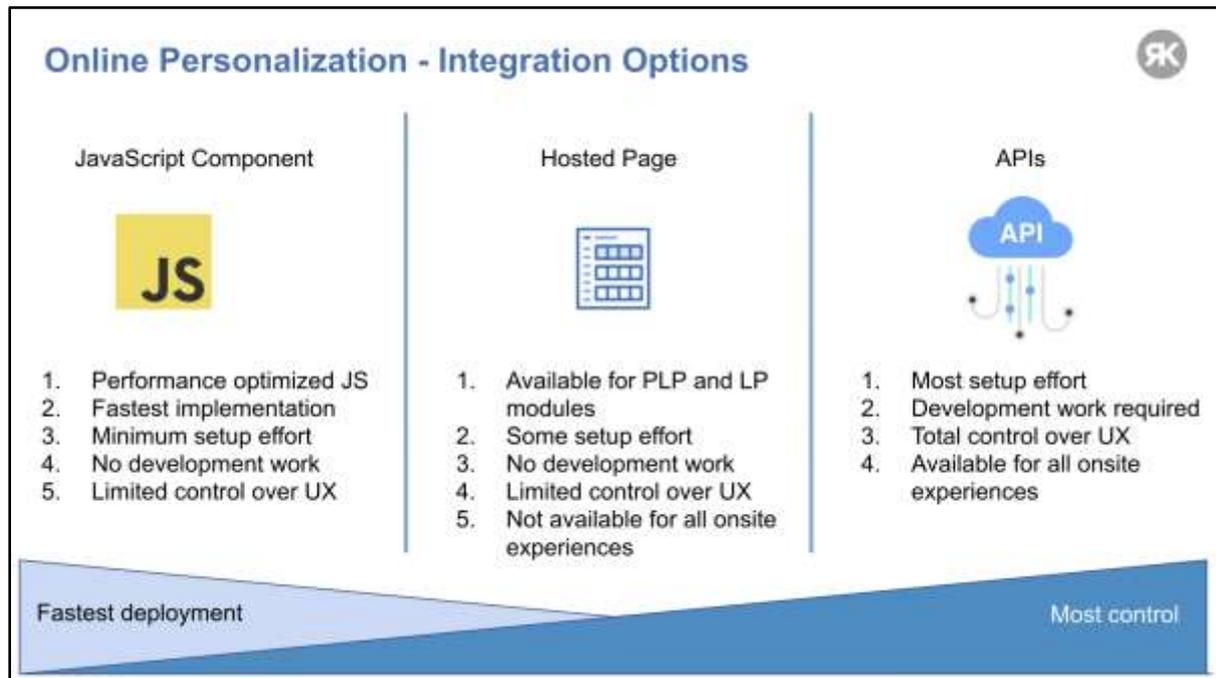
Sitecore Discover API

Sitecore Discover is a headless SaaS multi-tenant service. As such, Sitecore Discover exposes a thorough set of API endpoints to fully integrate all search, recommendation, and page experiences and their business controls. As you get to know the API, you will notice that we keep the logic simple, generic, and consistent across experiences. This means that much of the contextual filtering and configuration is controlled via the Customer Engagement Console (CEC) user interface.

The CEC provides a robust set of developer tools located under the **Developer Resources** main navigation icon, including:

1. API Access: this page avoids the need for email or text messages containing important integration information. Here, you will find your:

   o Customer Key

   o Beacon Path

   o API hosts

   o API Keys

   o Throttle limits

   o CDN Configuration for hosted pages

2. API Explorer: As the name indicates, this is a CEC page for developers interested in learning how to use the API to integrate any of Sitecore Discover personalization experiences with their site or mobile app.

3. Event Monitoring: Once you have a working version of an experience live on a lower environment, you can verify whether events for Discover widgets and purchase funnel are set up correctly.

4. AI Monitor: As with the Event Monitor, use this to go through a live experience onsite to understand the affinity interpretations Discover's AI is making from each product click.

5. Documentation: Accessible under **Developer Resources** > **Documentation**, this tab contains the full list of documents detailing every technical aspect of the Discover platform.

This document provides a brief overview of the Sitecore Discover APIs. For more information, site the Discover API - Search & Recommendation documentation.

Example: Data object to request Full Page Search results for the keyword `"shirts"`

```
        {
    "context": {
        "page": {
            "uri": "/hs/search.html"
        },
        "user": {
            "uuid": "Discover's anonymous cookie id",
            "user_id": "your CDP's id or other internal identifier"
        },
        "geo": {
            "ip": "73.158.153.38",
            "country": "US",
            "state": "California",
            "zip": "94114"
        },
        "browser": {
            "user_agent": "Mozilla/5.0 (Macintosh; Intel Mac OS X 10_11_1) AppleWebKit/537.36
(KHTML, like Gecko) Chrome/65.0.3325.181 Safari/537.36"
        }
    },
    "widget": {
        "all": true
    },
    "query": {
        "keyphrase": {
            "value": [
                "shirts"
            ]
        }
    },
    "facet": {
        "all": true,
        "total": true
    },
    "sort": {
        "choices": true
    },
    "content": {
        "product": {}
    }
}
```

`Context`, `widget`, and `content` objects are common to every experience request. `Facet` and `sort` are for full page search (FPS), product listing pages (PLPs), and landing pages (LPs) leveraging a search results widget. Finally, `query` is only applicable to preview search (PS) and FPS.

Discover JS component

The Discover JS Component integration method is the simplest of all integration methods. It requires a very basic code change on your side to add the widget to its desired location within the targeted page(s). Since the solution assumes that a pre-built JavaScript-based widget will load on your pages when in focus, you must send Discover a mockup of your widget's look and feel, so that our widget looks like a native piece of your pages.

The following illustrates an example from one of a client, Violet Grey. In the CEC, they have a merchandising widget called **Preview Search,** the Discover autocomplete search experience, which has an editable string id of value `rfkid_6`. Once their JS component was created and customized by Discover's integration team for their online touchpoint, all Violet Grey's team had to do was copy the code snippet provided in CEC for that merchandising widget and paste it in the correct location in their source code. An advantage of the Discover JS component method is that it is already instrumented to publish the necessary widget events.
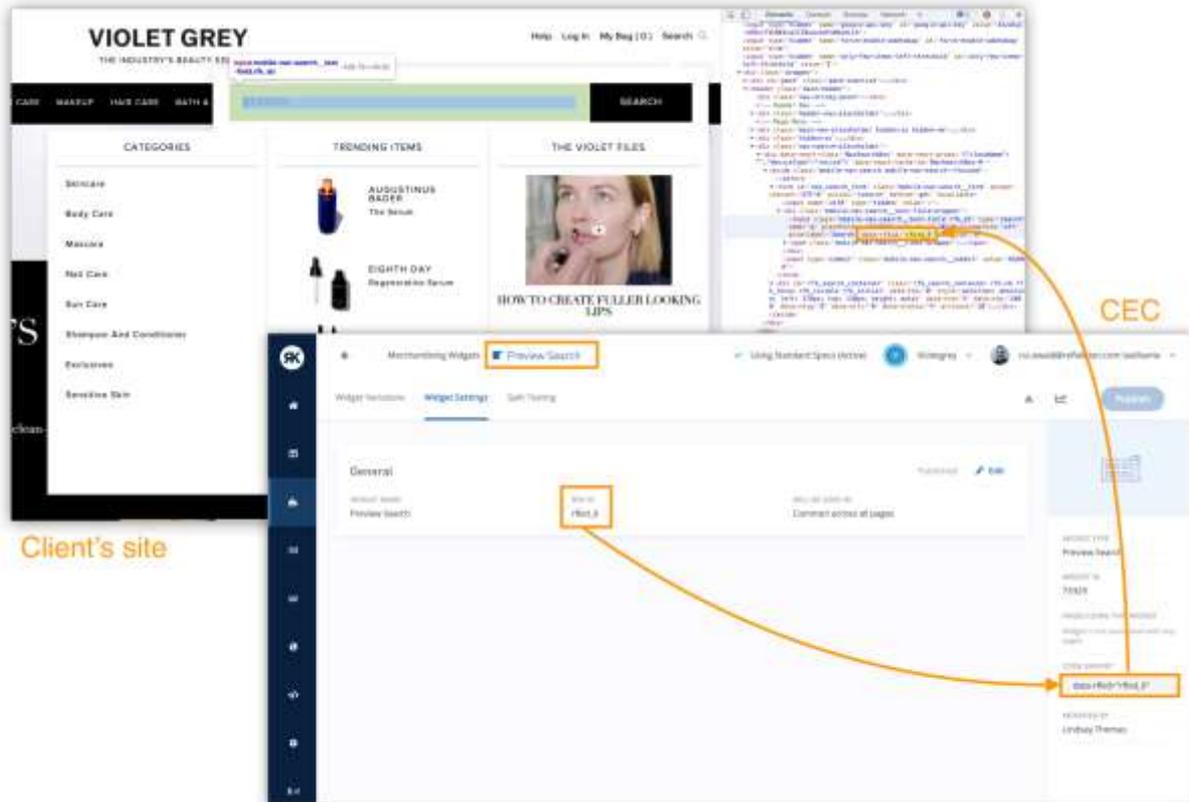
Hosted pages

The hosted page integration method is only available if you have subscribed to the Product Listing pages and/or Landing Pages modules. As the name implies, this integration model enables Discover to host pages that look exactly like the sites from your domain. The advantage of hosted pages is that you can immediately spin up a new page directly through the Discover CEC, and you do not have to integrate Widget Events, as they are automatically handled.

For more information, go to the Category Pages Technical Guide.

2.3.2   Integration scenario

Let's say you have chosen to integrate Discover experiences anywhere merchandising is exposed to your customers. You have also chosen to integrate your experiences using a mixed method approach, where some experiences are integrated as JS Components, others using the API, and Product Listing Pages and Landing Pages are hosted as shown in the following table:

Discover Module	Experiences	JS	API	Host
Preview Search	Visual Autocomplete	X		
Full Page Search	Full Page Search		X	
Pages	Landing Pages			X
	Product Listing Pages			X
	Product Details Page Recommendations	X		
	Collection Pages Recommendations			
	Home Page Recommendations	X		
	Cart Page Recommendations	X		
	No Results Recommendations	X		
	Discover Your Like			
Recommendations	Just For You		X	
Promotional Email	Promotional Email Recommendations	n/a	n/a	n/a
Content Personalization	Personalized Banners and HTML blocks		X	

Chapter 3 Appendix

3.1 Documentation Summary

Business Overview

Discover Service Overview

Discover Feed Setup

Data feed Specifications - default feed setup

Incremental Feed API Documentation - incremental, only if needed

Introducing Discover subdomain for beacons

ITP & Ad Blocker Technical Guide

Discover API integration for widgets and experience

API Overview

Search-Rec API Documentation

Sending events to Discover

Events API Documentation

Subscription/Integration Specific documentations:

PLP - hosted solution

Category Pages Technical Guide

Setups to let Discover control traffic split

Discover Experience Rollout Documentation

Full Page Search Setup Technical Guide

Using GTM to pass Discover events and context

Google Tag Manager Template Guide

General guidance

ADA Compliance Guide

SEO Tracking Technical Guide

Commerce & Content Search

3.2 Full timeline for integration scenarios

The following table provides an example of a full timeline to complete a Sitecore Discover integration, and the breakdown the activities that Sitecore and the client or partner performs.

	Sitecore Discover			Client / Partner	
2	Account creation and user invitation	1 day	1	Provide list of internal users	1 day
8	Integration team configures product attributes and service features	5 days	3	Accept the CEC user invite and retrieve subdomain sub-path and named servers	1 day
			4	Delegate sub-domain to the provided Discover named servers	2 days
9	Get confirmation of how each module will be implemented	1 day	5	Retrieve Discover Beacon from CEC **Developer Resources** > **API Access** and install it on site/online shopper touchpoint	1 day
10	Technical Presentation(s) on how to: 1. Place JS widgets on the site 2. Implementing funnel events (add to cart, and orders) 3. Build API requests for API based experiences 4. Build API events for API based experiences (widget appear and click) 5. Verify all events are correctly being published to Discover 6. Hosted page CDN/reverse proxy set up	1 day	6	Retrieve SFTP info from CEC **Developer Resources** > **API Access**	1 day
13	For JS and Hosted page JS experiences:	5 days	7	Submit Product and Category feeds	5 days

	1. Review front end designs 2. Build JS component customization according to client specs				
			11	For JS and Hosted page experiences: 1. Create and share front end designs with Discover 2. Create and share Site page template	10 days
			12	For JS and Hosted page experiences 1. Implement rfkids within proper locations on site via div tags 2. Tag the Hosted page template	10 days
			14	Integrate Hosted Page from root domain ● Execute CDN/reverse proxy set up for hosted JS PLP and Landing pages. See Category Pages Technical Guide	10 days
			15	Integrate API ● Build API requests for API based experiences	10 days
			16	For API integrated widgets: Build widget events for API based experiences (i.e., widget appear and click)	3 days

			17	Build Funnel Events (A2C and Order, Cart Update)	2 days
			18	Verify all events are correctly being published to Discover	2 days
			19	Executes recommended [phased roll out](#)	5 days
Total Sitecore Discover LOE		13 days	Total Client LOE		62 days