DunnSolutions
A KaarTech Company

emarsys plug-in for BIGCOMMERCE
User Guide

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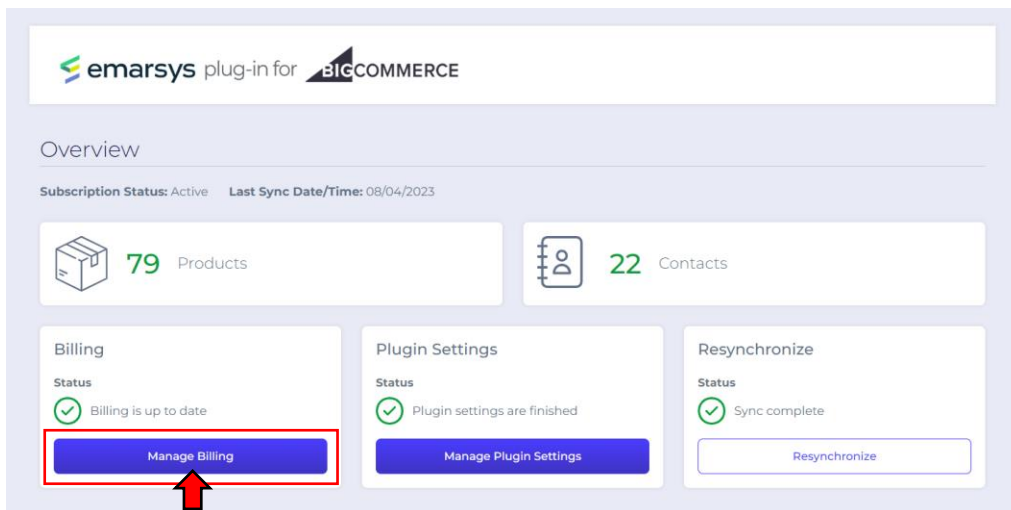
If you have any questions or comments about the Emarsys Plugin for BigCommerce User Guide, contact: emarsysplugin@kaartech.com

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Managing Billing

From the Main Dashboard, navigate to the Billing Page by clicking on the 'Manage Billing' button under the Billing Status summary:
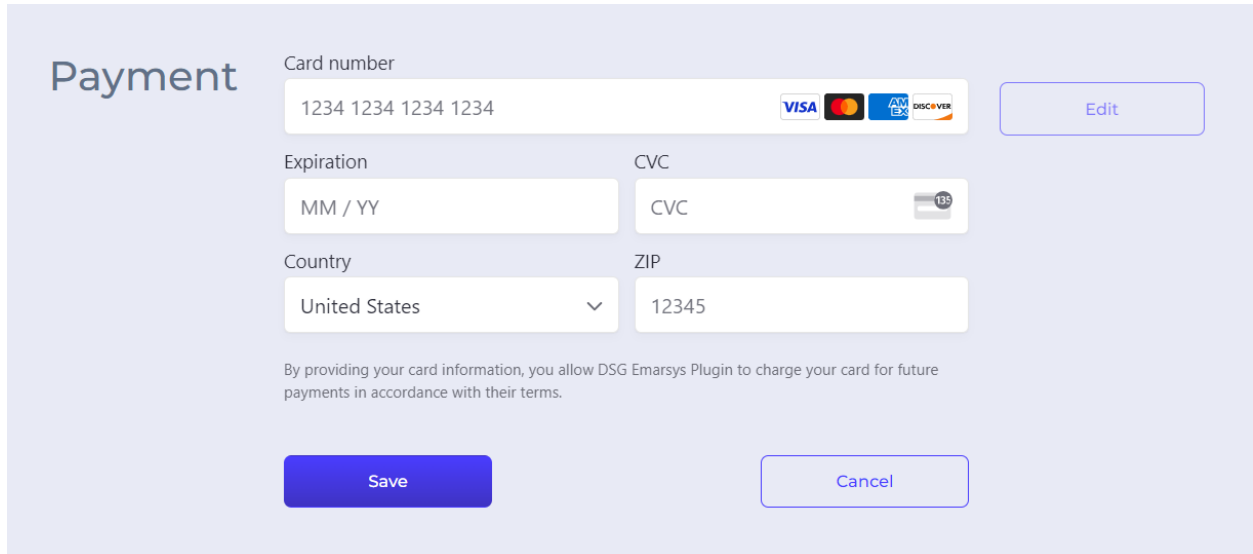

Once on the Billing Page, you should see controls for adding/editing subscription plans and payment methods:
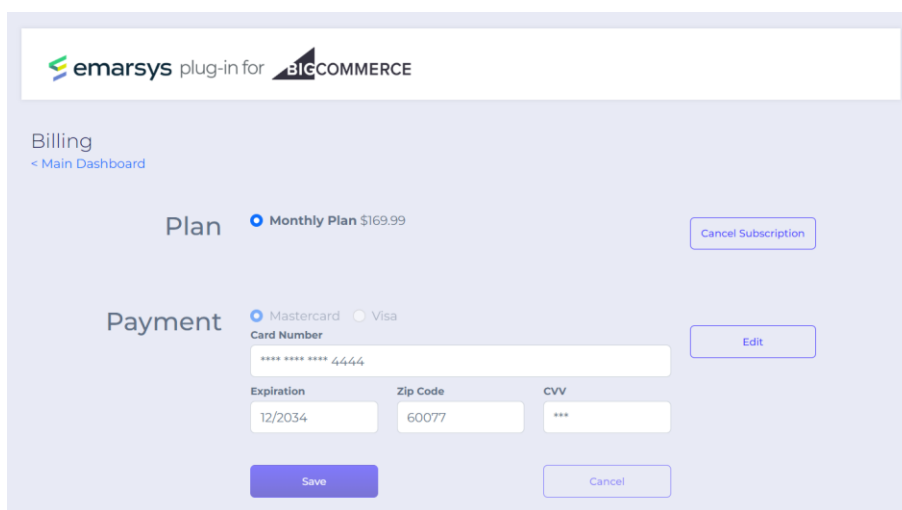
To navigate back to the Main Dashboard, click the 'Main Dashboard' link at the top left of the Billing Page.

Adding a Card for Payment

After installing the Emarsys Plugin for BigCommerce from the BigCommerce App Marketplace, you will need to provide a Mastercard or Visa credit card for billing your subscription plan. When there is no credit card saved for your plugin subscription, you will be automatically presented with the following form upon landing at the Billing Page:
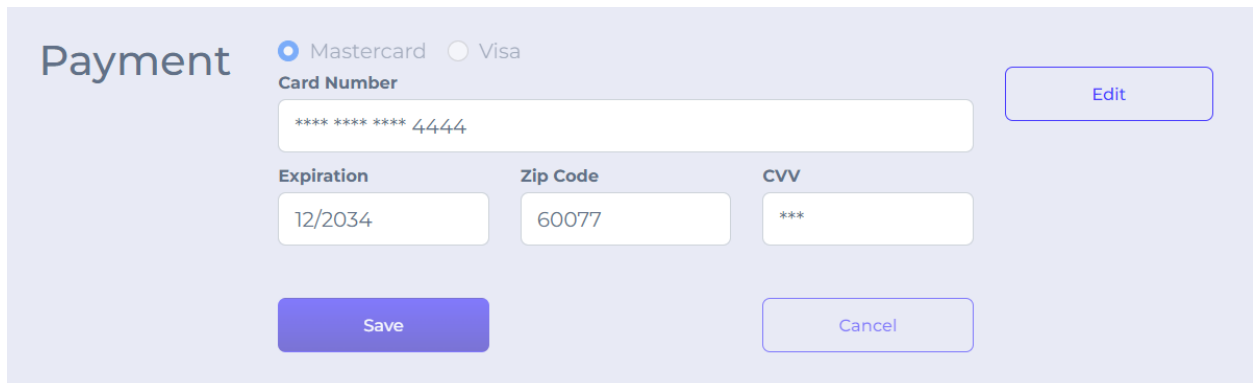

Add your credit card number, expiration, CVC, country, and zip code into the corresponding fields. Then, click the 'Save' button beneath the form to save your changes.

Note: the Emarsys Plugin for BigCommerce currently allows payment through Mastercard and Visa credit cards only.

After the Emarsys Plugin for BigCommerce has successfully validated and saved your payment information, you will see a summary of your payment data:
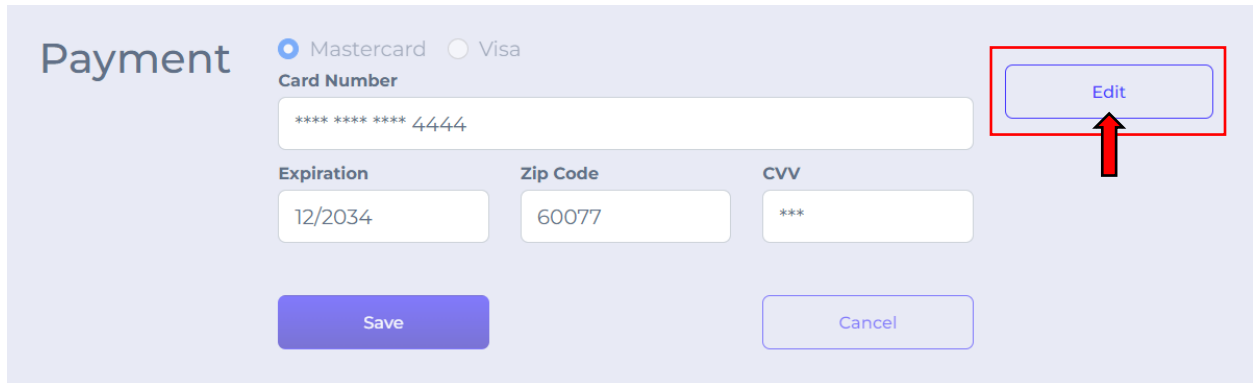
Updating a Card for Payment
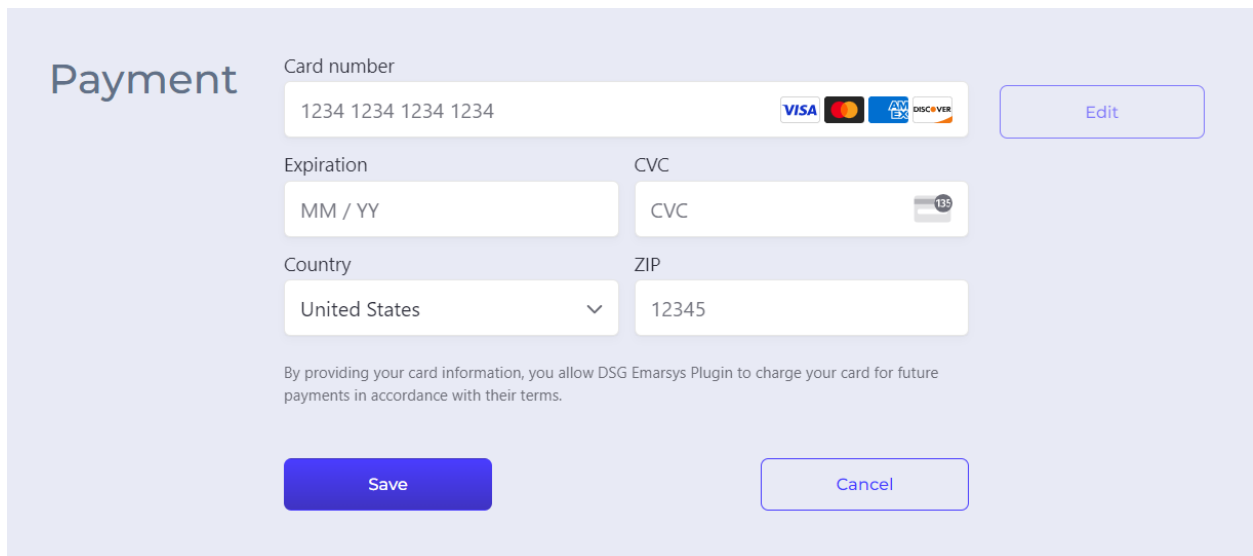
To replace the credit card used for billing your subscription plan, click the 'Edit' button to the right of the payment data summary:

You will then be presented with a new credit card form into which you can add your replacement card's information:
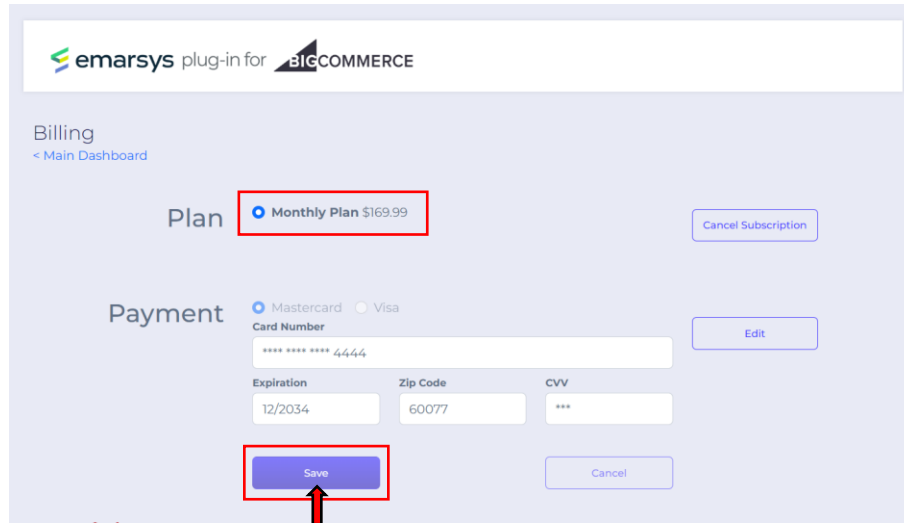
After entering your credit card details, click the 'Save' button beneath the form to save your changes or click the 'Cancel' button to abort the update and preserve your existing credit card record for billing your subscription plan.

Selecting a Subscription Plan

To synchronize your BigCommerce store data to your Emarsys account you must have an active Emarsys Plugin for BigCommerce subscription.

In the Plan section of the Billing Page, select the radio button next to the desired subscription plan and then click the 'Save' button at the bottom of the Billing Page to confirm your selection.

Note: your card on record will be charged immediately upon confirmation of your subscription selection. You will not be able to confirm your subscription if you have not saved a valid payment method with the Emarsys Plugin for BigCommerce.

Cancel a Subscription

You can cancel a subscription plan at any time by clicking the 'Cancel Subscription' button at the top right of the Billing Page.
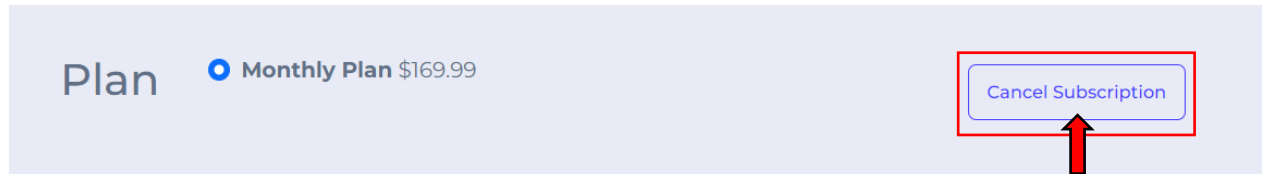
Note: you will need to confirm your subscription cancellation. The cancellation cannot be undone and will result in the discontinuation of Emarsys Plugin for BigCommerce services to your Emarsys account.

Manage Plugin Settings

From the Main Dashboard, navigate to the Plugin Settings Page by clicking on the 'Manage Plugin Settings' button under the Billing Status summary:
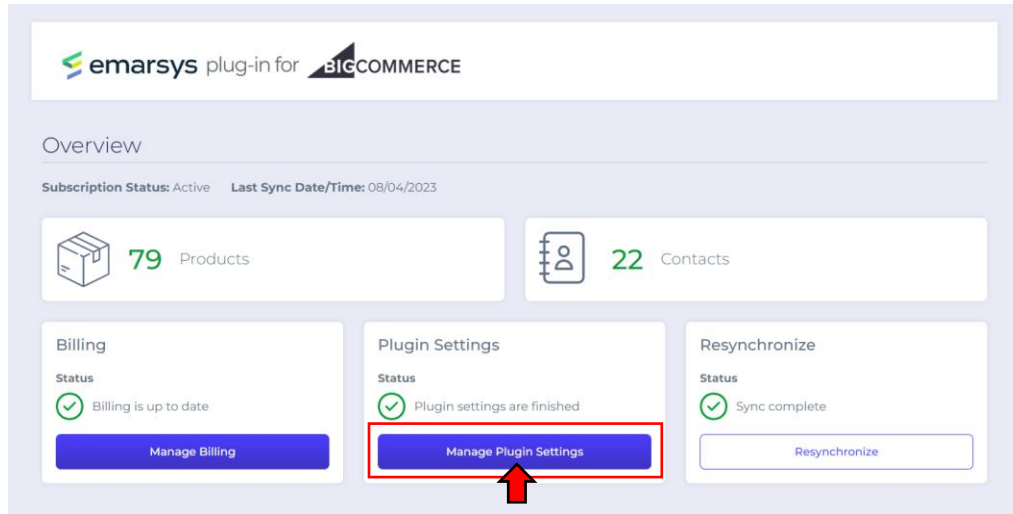
Upon landing at the Plugin Settings Page, you should see an Instructions Menu on the left side of the page and a corresponding form for saving settings data on the right side of the page.
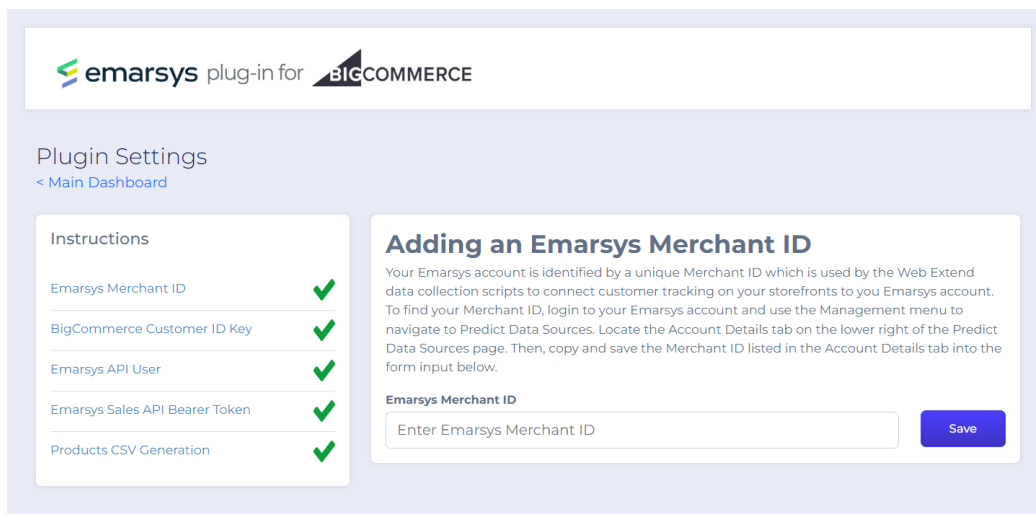
The clickable Instructions Menu pictured on the left side of the Plugin Settings Page will help you navigate to the different instructions which must be executed to connect your BigCommerce store to your Emarsys account. The instructions for each menu item are included within the Plugin; however, you can find these instructions with supporting visuals in the User Guide at the following links:

- Emarsys Merchant ID
- BigCommerce Customer ID Key
- Emarsys API User
- Emarsys Sales API Bearer Token
- Products CSV Generation

You can navigate back to the Main Dashboard at your leisure by clicking the Main Dashboard link at the top left of the Plugin Settings Page.

Adding an Emarsys Merchant ID

Your Emarsys account is identified by a unique Merchant ID which is used by the Web Extend data collection scripts to connect customer tracking on your storefronts to your Emarsys account.

To find your Merchant ID, login to your Emarsys account and use the Management menu to navigate to Predict Data Sources. Locate the Account Details tab on the lower right of the Predict Data Sources page.
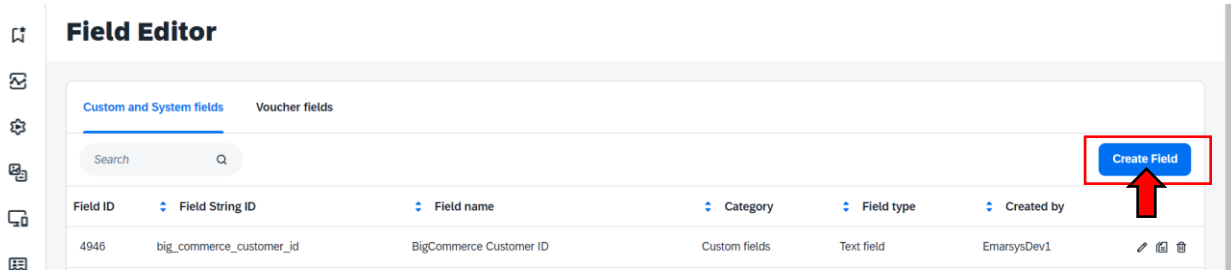

Copy and save the Merchant ID into the form field under the 'Adding an Emarsys Merchant ID' instructions on the Plugin Settings Page.

Adding a BigCommerce Customer ID Key

For Emarsys to connect anonymous customer activities to their corresponding BigCommerce Customer after login, you will need to create a Custom Contact Field in your Emarsys account to store the BigCommerce Customer ID.

To create a Custom Contact Field, login to your Emarsys account and use the Management menu to navigate to Field Editor. Click on the 'Create Field' button above the Custom and System Fields table.

You should see the Field Generator open in a separate window:

Create a new Custom Contact Field with the following values, clicking 'Create' to complete the field generation:

- Name: BigCommerce Customer ID
- String ID: big_commerce_customer_id
- Type: Text entry field for short alphanumeric values

After creating the custom field, identify, copy, and save the corresponding Field ID from the Custom and System Fields table into the form field under the 'Adding a BigCommerce Customer ID Key' instructions in the Plugin Settings Page.

Adding Emarsys API User Credentials

You must create an API User within your Emarsys account to sync your Emarsys contacts with your BigCommerce Store customers and trigger external events.

To create an API User, login to Emarsys as the Account Owner and use the Management menu to navigate to Security Settings > API Users. Click on the 'Create API User' button in the upper right corner and then click 'Create' to confirm the new API User creation.
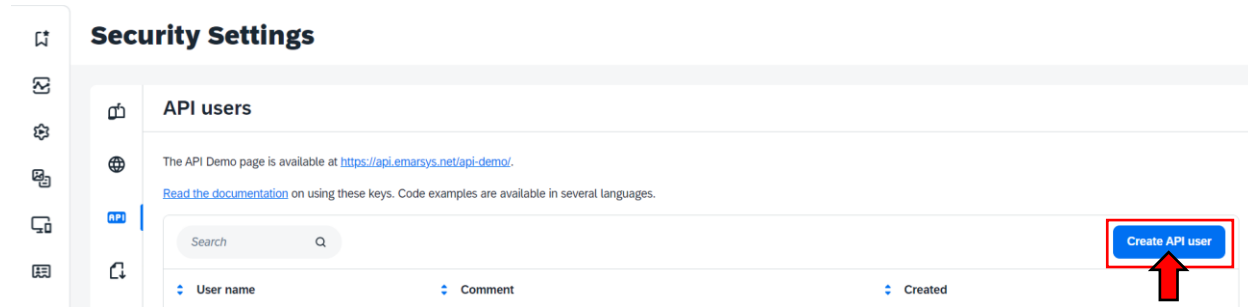
After creating the API User, copy and save username and secret in the respective form fields under the 'Adding an Emarsys API User' instructions on the Plugin Settings Page **before clicking the 'OK' button**.
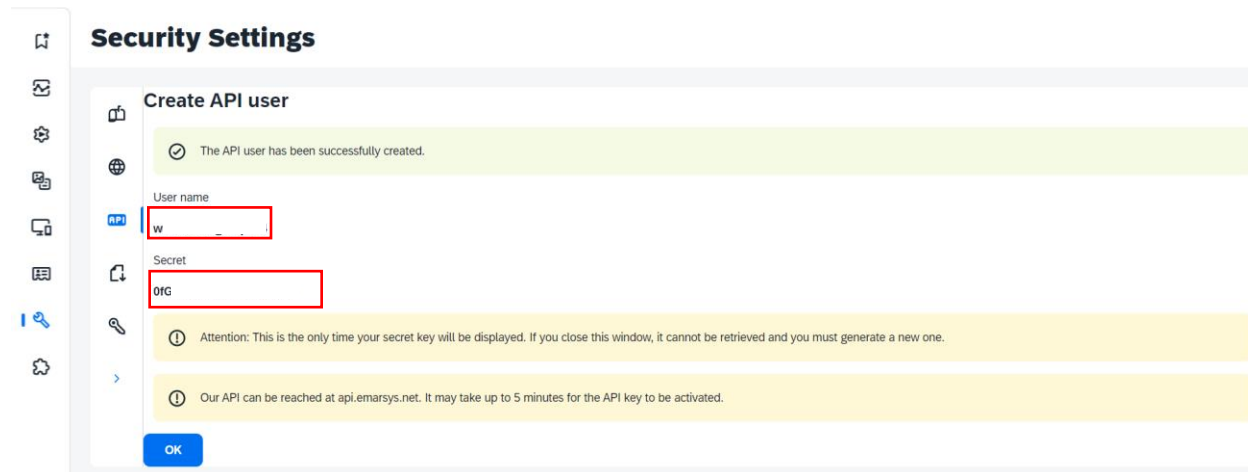
Finally, click the pencil icon next to the newly created API User to edit the user.

Assign all permissions within the following categories:
- contact
- contactlist
- customer
- externalevent
- field

Click 'Edit' at the bottom of the Edit API User form to save your changes.

Retrieving the Emarsys Sales API Bearer Token

To synchronize your BigCommerce Store's order history with your Emarsys account, you will need to provide the Sales API Bearer Token associated with your account.

Login to your Emarsys account and use the Management menu to navigate to Predict Data Sources. Then, navigate to the Sales Data page by clicking either the 'Sales Data' or 'Manage Sales Data' links displayed in the Sales summary near the bottom of the Predict Data Sources page.

Click the 'Show API Upload Details' button under the Automatic Uploads tab to open the API Upload Details modal. Copy and save the Bearer Token from the API Upload Details modal into the form input under the Emarsys Sales API Bearer Token instructions on the Plugin Settings Page.
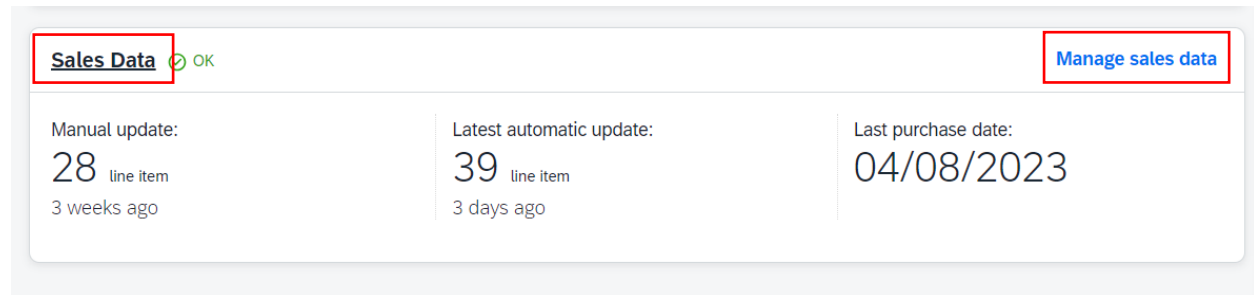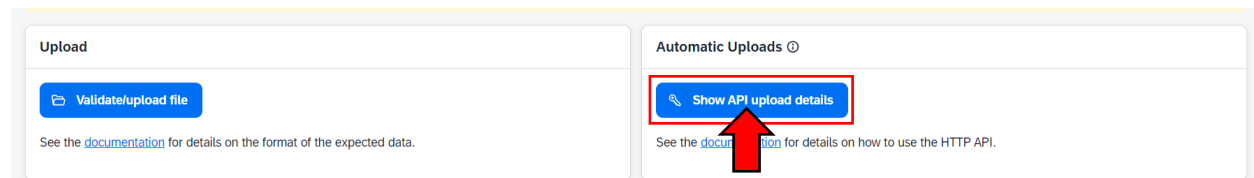

Note: if you do not see the 'Show API Upload Details' button, you may not have configured your Smart Insight Sales file yet. You can still make the button visible by first clicking the 'Click Here to Proceed' link in the warning banner at the top of the Sales Data Page.

Setting Up Products CSV Regeneration

Emarsys requires a formatted Products CSV upload to synchronize your BigCommerce store products catalog within Emarsys. The Emarsys Plugin for BigCommerce automatically generates the formatted Products CSV for you during synchronization and makes the file available via SFTP connection.
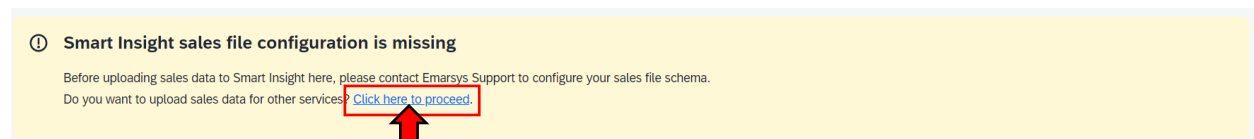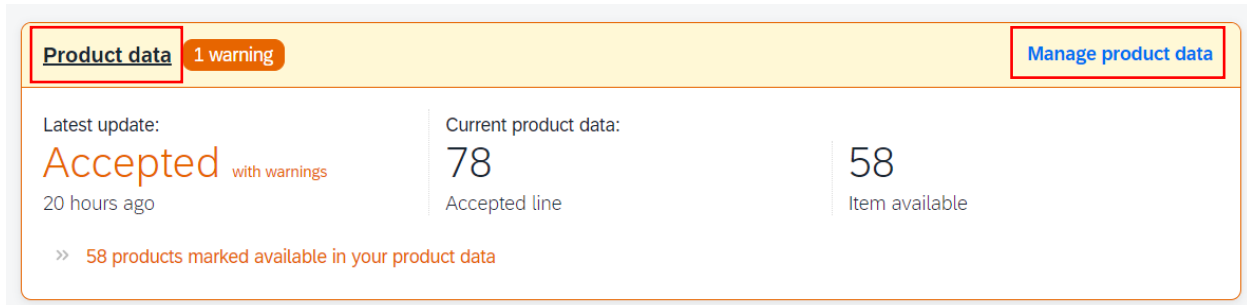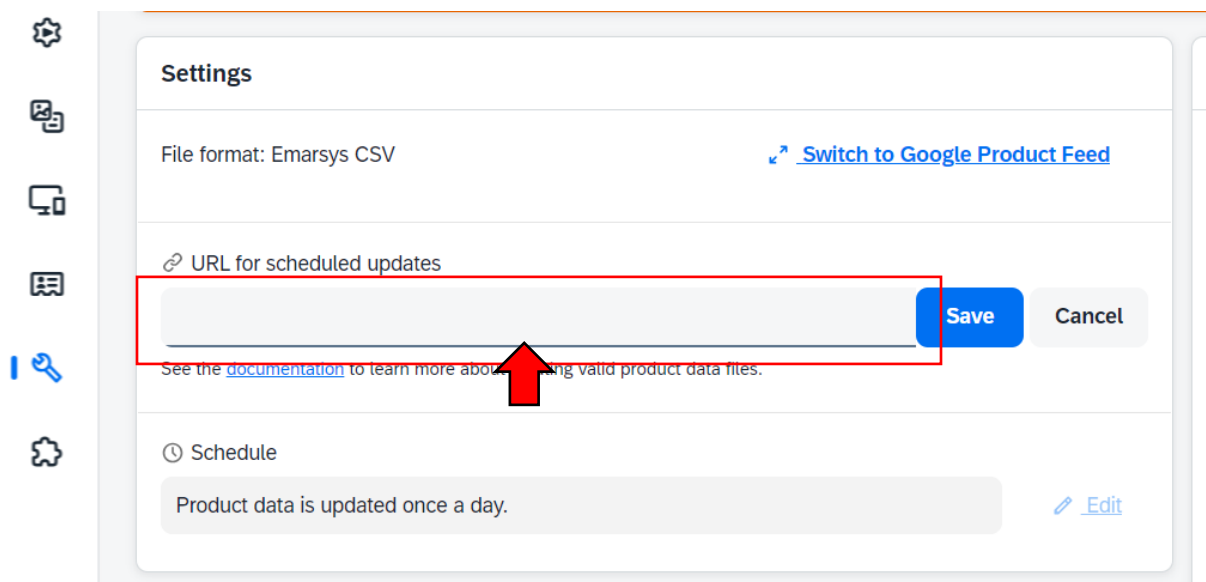
Login to your Emarsys account and use the Management menu to navigate to Predict Data Sources. Then, click either the 'Product Data' or 'Manage Product Data' link to navigate to the Product Data page.

Copy and save the SFTP URL in the Products CSV Regeneration instructions on your Plugin Settings Page into the 'URL for Scheduled Updates' form field on the Product Data page.

After your successful data synchronization, you can load your products catalog from the SFTP by clicking the 'Update from URL Now' button on the Product Data page.
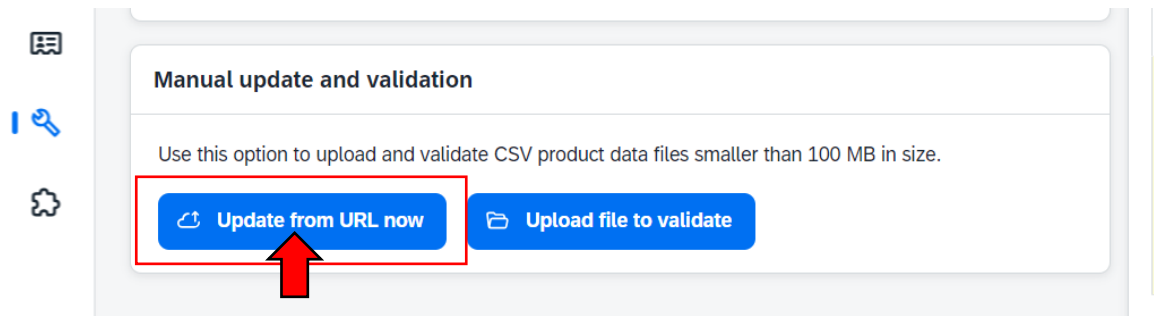
Note: you will not be able to update your Products CSV from Emarsys without first having successfully completed your initial data synchronization.

By default, the Emarsys Plugin for BigCommerce will regenerate your BigCommerce store's product catalog once daily; however, you can select up to two Product CSV daily regenerations. Select your desired Product CSV regeneration time within the Plugin using the 'Set Download Time(s)' dropdowns on the Plugin Settings Page.

Add an additional Products CSV regeneration by clicking the '+' button. You can remove a regeneration time by clicking the '-' button (only visible when multiple times are configured). Save your configurations by clicking the 'Save' button.

Synchronization

After validating your Billing and Plugin Settings data, you can begin synchronizing your BigCommerce store data to your Emarsys account by clicking the 'Synchronize' button on Main Dashboard.
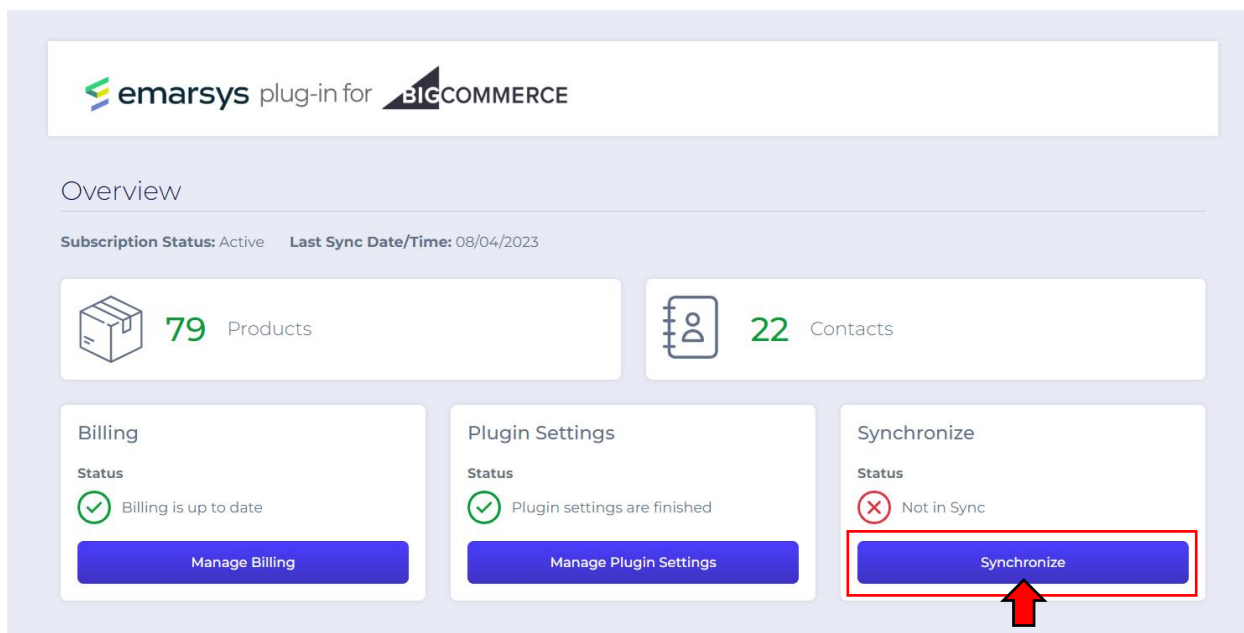

After starting the synchronization, you will see the Synchronization Status update to 'Syncing'.

The synchronization process will vary in time depending on the size of your BigCommerce Products, Customers, and Orders data and on the type of pricing plan you have selected for your BigCommerce store. When the synchronization has completed, the BigCommerce Store Owner will receive an email summarizing the successfulness of the synchronization attempt.

Note: you can ingest your Products CSV file into your Emarsys account after successfully completing your initial data synchronization with the Emarsys Plugin for BigCommerce (see Setting Up Products CSV Regeneration for more information). Otherwise, the initial Products CSV load will occur at the first time you have specified in your Products Data page in your Emarsys account.

Resynchronization

After initial synchronization, the Emarsys Plugin for BigCommerce will continue to regenerate your Products CSV according to your Plugin Settings configurations. Additionally, your incremental Contacts and Sales syncs will happen in real time using Emarsys API and WebExtend tracking scripts. However, if your Emarsys account becomes out-of-sync with your BigCommerce data (for example, from an unexpected subscription cancellation due to card expiration), you can resynchronize your store data by clicking the 'Resynchronize' button in the Main Dashboard.
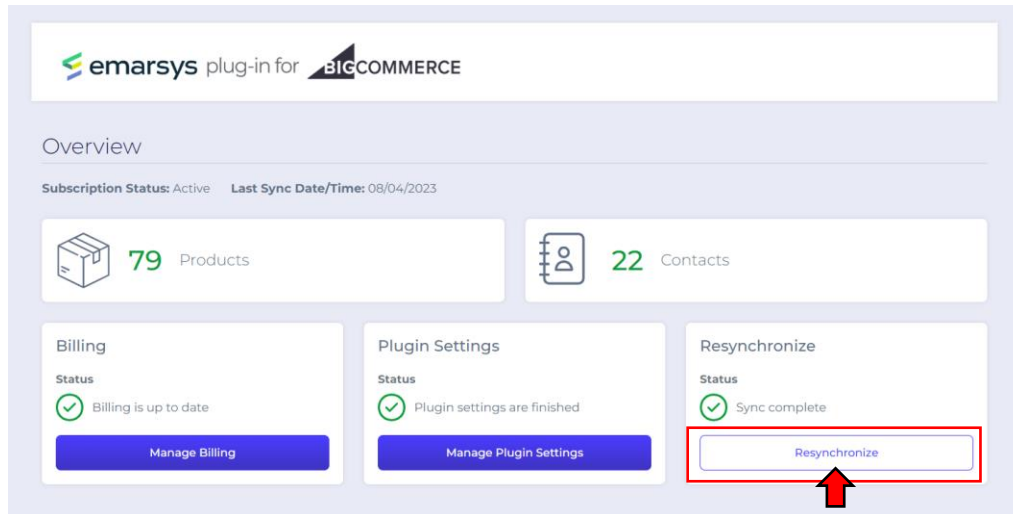
Be sure to clear any existing sales data in your Emarsys account prior to performing a resynchronization. Otherwise, you may have duplicate sales records in your account after the resynchronization is complete.

If you have any questions or comments about the Emarsys Plugin for BigCommerce User Guide, contact: emarsysplugin@kaartech.com