

Integrating Oracle CX Commerce and Oracle Loyalty Cloud



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1

Introduction

Oracle Loyalty Cloud can be integrated with Oracle CX Commerce. The integration enables a merchant to use the loyalty program features provided by Oracle Loyalty Cloud with an Oracle CX Commerce store. Shoppers can thus accrue Oracle Loyalty Cloud program points when they spend at an Oracle CX Commerce store.

Audience

This document is written for Commerce and Loyalty Cloud administrators who are configuring the integration of these two systems. Readers of this document should have experience with both Oracle CX Commerce and Oracle Loyalty Cloud.

This document describes only how to configure integrations of Oracle CX Commerce with Oracle Loyalty Cloud. For information about other configurations, refer to the documentation of these products.

Architectural overview

The integration is based on the loyalty infrastructure of Oracle CX Commerce and Oracle Integration Cloud.

The message flow of business entities from Commerce to Loyalty Cloud happens through Oracle Integration Cloud.

Commerce includes an Oracle Integration Cloud adapter (the Commerce adapter) that is used for the integration. The Loyalty Cloud part of the integration uses the Oracle Sales Cloud adapter for Oracle Integration Cloud. Data from the Commerce store is transmitted via webhooks through Oracle Integration Cloud to Loyalty Cloud. All action is triggered in Commerce. The data from Loyalty Cloud reaches Commerce through Oracle Integration Cloud as well.

For more information about Oracle Integration Cloud, refer to the documentation on the Oracle website.

Features

This product is a ready-made integration of Oracle CX Commerce and Oracle Loyalty Cloud. Through this integration, the scope of a Loyalty Cloud loyalty program can be extended so that members of a Loyalty Cloud program can earn points when they buy products in aCommerce store.

Through the integration of Commerce and Loyalty Cloud, shoppers can:

- Enroll in a loyalty program which provides rewards for purchases of goods or services.
- Accrue points by placing orders for goods or services in Commerce. Points are assigned based on the total order value and not the particular products purchased. At any time, shoppers can view the total number of points that they have accrued.

- Redeem points by spending them on the purchase of goods or services. With each purchase, the shopper's total number of accrued points is decreased by the number of points redeemed.

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Prerequisites

The integration of Oracle Loyalty Cloud with Oracle CX Commerce requires completion of prerequisite steps for it to be successful.

Required versions

A successful integration of Oracle CX Commerce and Oracle Loyalty Cloud requires the following versions (or later) of these products:

- Oracle CX Commerce 18A
- Oracle Integration Cloud 18.1.5
- Oracle Loyalty Cloud 18.02

Access rights

To configure the integration, you need administrator access to three systems:

- Oracle CX Commerce, which enables you to configure the webhook settings in the administration interface.
- Oracle Integration Cloud, which enables you to map the attributes between Commerce and Loyalty Cloud.
- Loyalty Cloud, which enables you to configure the fulfillment and configure the products and the activities associated with fulfillment.

Assumptions

This integration makes the following functional assumptions:

- Orders can be created only on Commerce channels. Orders created on non-commerce channels are not within the scope of this integration.
- It is assumed that the merchant updates the card settlement information about Commerce.
- The points are configured on Loyalty Cloud.
- Only one loyalty program can be associated with a site.
- The entire order can be paid by mix of currency and points, but cannot be available at the same time for the same site.

Additional documentation

Additional documentation can be found:

Documentation of Oracle Loyalty Cloud is available through Loyalty Cloud documentation: <https://cloud.oracle.com/opc/loyalty-cloud/documentation>.

For information about Commerce, refer to the following Oracle Help Center page:
https://docs.oracle.com/cloud/latest/commercecs_gs/index.html.

For information about Oracle Integration Cloud and the Commerce adapter, refer to Oracle Integration Cloud Service documentation at this URL: <https://docs.oracle.com/en/cloud/paas/integration-cloud-service/index.html>.

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Creating Sites for Shopping With Currency and Points

It is recommended that you create separate sites for shopping with currency (accruing points) and shopping with points (redeeming points). This section describes the features that distinguish each site from the other.

Understand accrual and redemption sites

You must create a separate loyalty program for each site.

For information about how to create loyalty programs, refer to Oracle Loyalty Cloud, Administering Loyalty. For information about how to associate a loyalty program with a site, see [Attach the Loyalty program to your site](#).

Features of an accrual site

On an accrual site, shoppers make purchases in a monetary currency such as the euro or in the secondary currency that you have configured for the site. Shoppers accrue points for their purchases. For this site, you must create:

- A price list in a monetary currency or in your secondary currency. You create the price groups in Commerce. For more information, refer to [Configure Price Groups](#).
- A rule that specifies how many points are awarded for a given amount spent, or for other behaviors as desired by the merchandiser. You create the rule in Loyalty Cloud.

Points are awarded in a custom currency that you configure. The custom currency is designated by an arbitrary code such as "PTS". For example, a rule might award 1 PTS for every 5 EUR spent.

For each shopper, Loyalty Cloud maintains the total number of accrued points. This total is increased when shoppers make purchases on an accrual site. Shoppers can view their totals of accrued points in Commerce.

Features of a redemption site

On a redemption site, shoppers make purchases by redeeming points that they have accrued. For this site, you must specify:

- A price list with prices in the custom currency that you have configured, such as PTS. When shoppers browse on a redemption site, however, they see prices in loyalty points. You create the price list in Commerce.
- A secondary currency, which is used to calculate tax and shipping on orders placed in the custom currency. For information, see [Specify a secondary currency for the site](#).

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Configure Oracle Loyalty Cloud

There are steps that you must follow to configure Oracle Loyalty Cloud to enable it to be integrated with Oracle CX Commerce. For detailed information about each of the steps described in this section, refer to Oracle Loyalty Cloud, Administering Loyalty.

Create a virtual product for internal use by Loyalty

You must create one virtual (“dummy”) product that Loyalty Cloud will use internally. You must configure the product to indicate that it is not for sale.

You create this product in Loyalty Cloud.

Create an Oracle CX Commerce-related program in Loyalty

A program is the highest-level entity in Loyalty Cloud. Members, tiers, promotions, point values, and so on are all specific to a single program.

To create a program, follow these steps:

- Configure and activate a program in Loyalty Cloud. For detailed information, see Setting Up Loyalty Cloud Programs in [Oracle Loyalty Cloud, Administering Loyalty](#).
- Note the program ID. You will reference this program ID when you attach Loyalty Cloud to your site.

Configure promotions in Loyalty Cloud

After you create and configure a loyalty program, you can create a promotion to for it. Promotions enable loyalty program members to earn points by making purchases. Promotions also enable members to redeem points to make purchases. Promotions are specific to a loyalty program and promotion names are unique in the program.

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Configure Oracle CX Commerce

There are steps that you must follow to configure Oracle CX Commerce to enable it to be integrated with Oracle Loyalty Cloud.

Create a custom property for the enrollment checkbox

You must create an `occ_enrollToLoyalty` custom property of type Boolean at the shopper profile level. This property enables the checkbox that shoppers use to enroll in their site's loyalty program.

Note: When you create custom properties, make sure that your property name has an underscore (`_`). This ensures that the ID will not conflict with any properties that Commerce adds to profiles in the future. The endpoint produces an error if you attempt to create a custom property without an underscore in its ID. For example, you could create a custom property named `xyz_enrollToLoyalty`. Once you have created a custom property, you must customize integration flows so that they use the newly named property (containing the underscore character). You do this by replacing any old property references with the new custom property name(s) so that you override existing mappings for the custom properties.

Note: Customization for the OIC flow is required only if you choose a different property name.

Add the checkbox to the appropriate widget, by issuing a `PUT /ccadmin/v1/shopperTypes/user` endpoint on the administration server. Use the following example as the body of the request:

```
{  "properties": {
    "xyz_enrollToLoyalty": {
      "internalOnly": false,
      "label": "Enroll in Loyalty program",
      "type": "checkbox",
      "uiEditorType": "checkbox"
    }
  }
}
```

Create custom properties for the order type

You must create the following custom properties for the order type:

- `occ_loyaltyTransactionId` of type string
- `occ_loyaltyPointsAccrued` of type int
- `occ_accruedPointType` of type string

To create these properties, issue a `PUT /ccadmin/v1/orderTypes/order` endpoint on the administration server. Use the following example as the body of the request:

Note: When you create custom properties, make sure that your property name contains an underscore (_). This ensures that the ID will not conflict with any properties that Commerce adds to accounts in the future. The endpoint produces an error if you attempt to create a custom property without an underscore in its ID. For example, you could create a custom property named `XYZ_loyaltyTransactionId`. Once you have created a custom property, you must customize the OIC integration flows so that they use the newly named property (containing the underscore character). You do this by replacing any old property references with the new custom property name(s) so that you override existing mappings for the custom properties.

```
{  "properties": {
    "xyz_loyaltyTransactionId": {
      "internalOnly": true,
      "label": "Loyalty transaction Id",
      "type": "shortText",
      "uiEditorType": "shortText"
    },
    "xyz_loyaltyPointsAccrued": {
      "internalOnly": false,
      "label": "Loyalty points accrued",
      "type": "number",
      "default": 0,
      "uiEditorType": "number"
    },
    "x_accruedPointType": {
      "internalOnly": false,
      "label": "Point type",
      "type": "shortText",
      "uiEditorType": "shortText"
    }
  }
}
```

Create a custom currency for loyalty points

You must associate a specific currency with each point type. These currencies are known as custom currencies. One unit of a custom currency is worth one point. For more information about custom currencies, see [Creating Sites for Shopping With Currency and Points](#).

Note: The custom currency code cannot be an ISO 4217 monetary currency code such as "USD". Instead, use an arbitrary code to represent the custom currency, such as "PTS".

To create a custom currency, issue a `POST /ccadmin/v1/currencies` endpoint on the administration server. The following example illustrates the body of a request:

```
{
  "currencyType": "loyaltyPoints",
  "symbol": "P",
  "displayName": "PTS",
  "id": "normal",
  "currencyCode": "PTS"
}
```

The value of `currencyType` must be "loyaltyPoints". Any other value will cause an error.

`symbol` is a Unicode string that specifies the currency symbol. When shoppers select the points-based currency on your store, prices are displayed with this currency symbol.

The value of `currencyCode` is a string that represents the `pointType` of the loyalty program.

Specify a secondary currency for the site

You must specify a monetary currency to be the secondary currency of this site. The secondary currency is used to calculate tax and shipping on orders placed in the custom currency.

To specify a secondary currency for your site, issue the `PUT /ccadmin/v1/sites/site-id` endpoint on the administration server. Whenever an order contains a combination of loyalty points and monetary currency, the `secondaryCurrency` code and `exchangeRate` are added to the order.

The following example illustrates the request to define US dollars as the secondary currency:

```
{
  "properties": {
    "secondaryCurrency": "USD"
  }
}
```

Specify an exchange rate between custom and target currencies

You must specify an exchange rate between the custom currency in which shoppers place orders and the target currency in which the values of orders are submitted to the tax engine.

Using the same exchange rate, the tax calculated by the tax engine is converted back to the custom currency and displayed to the shopper in Commerce.

The amount in `targetCurrency` equals the amount in `sourceCurrency` multiplied by `exchangeRate`.

To configure the exchange rate between a custom currency and a target currency, issue a `POST /ccadmin/v1/exchangerates` endpoint on your administration server. The following example illustrates the body of the request:

```
{
  "sourceCurrency": "PTS",
  "targetCurrency": "USD",
  "exchangeRate": 0.25
}
```

The `sourceCurrency` is the custom currency that you configure for purchasing orders. The value of `sourceCurrency` must not be an ISO currency code. Note that one unit of a custom currency is worth one point.

The `targetCurrency` must be a valid 3-digit alphabetic or numeric ISO 4217 currency codes.

Note: The `targetCurrency` should be the same as the site's `secondaryCurrency`.

For more information, refer to *Extending Oracle Commerce Cloud* Understand currency exchange rates.

Attach the Loyalty program to your site

To attach the loyalty program to your site, issue a PUT `/ccadmin/v1/sites/{siteID}` endpoint on the administration server. Use the following example as the body of the request:

```
{
  "properties": {
    "loyaltyPrograms": [
      {
        "programName": "loyalty program for OCC",
        "programId": "OCCSuperSaver"
      }
    ]
  }
}
```

The value of `programName` is the name of the loyalty program.

The value of `programId` is the ID of the Loyalty Cloud loyalty program.

Enable the Loyalty Cloud point payment gateway

To enable the Loyalty Cloud payment gateway, follow these steps:

1. Log in to the Commerce administration interface.
2. Navigate to **Settings**.
3. Select **Extensions**.
4. Select **Loyalty Point Payment Gateway Extension** from the **Installed Extensions** list. If **Loyalty Point Payment Gateway Extension** does not appear in the list, you must create it. For more information, refer to *Integrate with a Loyalty Point Payment Gateway in Extending Oracle CX Commerce*.
5. Click **+ Upload Extension**. Upload the ZIP file that contains the .json files that configure Loyalty Point Payment Gateway Extension.
6. Select the **Payment** processing tab.
7. Under **Payment Gateways**, select the service type as **Loyalty Points Payment Gateway**.
8. Check the checkbox for **Payment Gateway Enabled**.

9. Make sure the loyalty points' labels are checked for the Preview, Storefront and Agent configurations. (These labels are checked by default.)
10. Click **Save**.

Configure a price group and product prices

You must configure one price group for each site that supports loyalty programs. You specify the prices of individual products in the price group.

On an accrual site, the prices must be given in a customer currency. On a redemption site, the prices must be given in a secondary currency. For more information, see

[Understand accrual and redemption sites](#).

For detailed information about how to create price groups, see [Configure Price Groups](#).

Attach the price group to your site

You must specify price groups for the site where shoppers accrue points and for the site where shoppers redeem points. On the site where shoppers accrue points, prices are given in a monetary currency such as euros or dollars. On the site where shoppers redeem points, prices are given in a custom currency that you create.

To attach the price group that you created for Loyalty Cloud to your accrual site or redemption site, issue a `PUT /ccadmin/v1/sites/{id}` endpoint on the administration server, where `{id}` is the site ID. Use the following example as the body of the request:

```
{
  "properties": {
    "priceListGroupList": [
      {
        "active": true,
        "id": "defaultPriceGroup"
      },
      {
        "active": true,
        "id": "loyaltyPoint"
      }
    ]
  }
}
```

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Install the Integration

After you configure Oracle CX Commerce and Oracle Loyalty Cloud, you must install the Oracle CX Commerce-Oracle Loyalty Cloud integration package in Oracle Integration Cloud (OIC).

Download and import the integration

You need to download the integration and import it into Oracle Integration Cloud (OIC).

To do this, follow these steps:

1. Download the integration package `OCCS-LOYALTY-INTEGRATION.par` from the Oracle Cloud Marketplace.
2. Log in to OIC as an admin user.
3. Click **Package**.
4. In the Import Package dialog, click **Import**
5. Click **Browse** to open a navigation pane.
6. Browse for and select `OCCS-LOYALTY-INTEGRATION.par`.
7. Click **Import**. The `OCCS-LOYALTY-INTEGRATION.par` package is added to the Packages list.

Configure the connections

After you install the `OCCS-LOYALTY-INTEGRATION.par` package, you must configure the connections used by the integration. To do this, follow these steps:

1. Log in to Oracle Integration Cloud (OIC) as an admin user.
2. Select **Integration->Designer->Connections**.

The following connections are displayed:

Oracle Commerce

Oracle Loyalty Cloud

3. Select the connection Oracle CX Commerce. The Connection Properties dialog appears.
4. Enter the security token value, which you can find in the Oracle CX Commerce administration settings. The security token is the application key in the Oracle CX Commerce Administration Interface found under Registered Applications Settings. Contact your Oracle CX Commerce Administrator to get this application key.
5. Enter the URL to connect to Oracle CX Commerce as the value of the Connection Base URL property, and click OK.

6. Select the connection Oracle Loyalty Cloud. The Connection Properties dialog appears.
7. Enter the URL to connect to Oracle Loyalty Cloud as the value of the OSC Services Catalog WSDL URL property.
8. Enter the Interface Catalog URL to connect to Oracle Loyalty Cloud in this format: `https://<host>:<port>/fscmRestApi/otherResources/latest/interfaceCatalogs` This property is required for the loyalty connection.
9. Enter username and password to connect to Loyalty system and click **OK**.

Note: The developer creating the Oracle Sales Cloud connection must work with the Oracle Sales Cloud administrator to get the WSDL URL for the OSC Services Catalog and Interface Catalog URL.

Map the Loyalty currency code to the Loyalty point type

Next, you must update a lookup table to map the currency code used by Loyalty Cloud to its point type. To do this, follow these steps:

1. Log in to Oracle Integration Cloud (OIC).
2. Configure the lookup `OCCS-TO-LOYALTY-LOOKUP` to map the Loyalty currency code of Oracle CX Commerce to the point type of Oracle Loyalty Cloud.

Assign values to constants in OIC integration flows

Next, you must map values for the ID of the virtual (“dummy”) product, the custom currency, and the source system name to constants in OIC integration flows. To do this, first log in to OIC as an admin user. Then follow the steps listed in the following sections.

Assign values to constants in Commerce to Loyalty Accrual

You must assign values to constants in the OCCS to Loyalty Accrual integration flow. To do this, follow these steps

1. Select the integration flow `OCCS to Loyalty Accrual`.
2. Left click the constant `LOYALTY_CONSTANTS_DUMMY_PRODUCT_ID`.
3. Choose Edit and enter the ID of the virtual product that you configured.
4. Click **Close**.
5. Left click the constant `OCCS_CONSTANTS_CUSTOM_CURRENCY_CODE`.
6. Choose Edit and enter the custom currency code that you created, for example, `PTS`.
7. Click **Close**.
8. Click **Save** so that both constants are now saved with updated values.

Assign values to constants in OCCS to Loyalty Redemption and Cancel

1. Select the integration flow `OCCS to Loyalty Redemption and Cancel`.
2. Left click the constant `LOYALTY_CONSTANTS_DUMMY_PRODUCT_ID`.
3. Choose **Edit** and enter the ID of the virtual product that you configured.
4. Click **Close**.
5. Left click the constant `OCCS_CONSTANTS_CUSTOM_CURRENCY_CODE`.
6. Choose **Edit** and enter the custom currency code that you created, for example, `PTS`.
7. Click **Close**.
8. Click **Save** so that both constants are now saved with updated values.

Assign values to constants in OCCS to Loyalty Member enrollment

1. Select the integration flow `OCCS to Loyalty Member enrollment`.
2. Left click `ConfigurableNames_Source_System`. The default value is `CommerceCloud`.
3. (Optional). Enter a non-default value for `ConfigurableNames_Source_System`.
4. Click **Close**.
5. Click **Save**.

Activate the integration flows

After you configure the Oracle Loyalty Cloud and Oracle CX Commerce connections, you must activate the integrations that were created when the integration package was imported to Oracle Integration Cloud. To do this, follow these steps:

1. Log in to Oracle Integration Cloud (OIC) as an admin user.
2. Click the **Integrations** icon to display the Integrations list.
3. Click the **Activate** button for each of the following integrations:

```
OCCS to Loyalty Accrual  
OCCS to Loyalty Redemption and Cancel  
OCCS to Loyalty Member enrollment  
OCCS to Loyalty accrual cancellation
```

4. Optionally, you can now switch on detailed tracing. Detailed tracing collects information about messages processed by the integration flow. This can help troubleshoot issues with the integration flow; however, it may affect performance.
5. To switch on detailed tracing, check the **Enable Detailed Tracing** checkbox. After an integration flow becomes active, you must deactivate it and activate it again to switch detailed tracing on or off.
6. Click **Activate**.

A message should be displayed to indicate that the integration flow has been successfully activated.

Configure webhooks to reference the integration URLs

You must configure webhooks in Oracle CX Commerce to enable Oracle CX Commerce to push data to the external system specified by the URLs that you entered.

After you activate the integration flows in OIC, click the **How to Run** icon for each integration and capture the endpoint URL from the popup that appears. Remove the metadata from the URL

The URL that you capture will be of the following form:

```
http://<hostname>:<port>/ic/api/integration/v1/flows/
rest_oraclecommercecloud/OCCS_TO_LOYALT_ACCRUA_CANCEL/1.0/
```

The following table lists the webhooks that must push data to the specified URLs. Note the type of each webhook (function or event specified in the first column).

Configure these webhooks to push data to the URLs of these integrations
Shopper Profile Create (an event webhook) Shopper Profile Update (an event webhook)	ORACLE COMMERCE CLOUD to Loyalty Member enrollment
Order Submit without Payment Details (an event webhook)	ORACLE COMMERCE CLOUD to Loyalty Accrual
Return Request Update without Payment Details (an event webhook)	ORACLE COMMERCE CLOUD to Loyalty accrual cancellation
Custom Currency Payment (a function webhook)	ORACLE COMMERCE CLOUD to Loyalty Redemption and Cancel

To configure the webhooks, follow these steps:

1. Log in to the Oracle CX Commerce administration interface.
2. Click the **Menu** icon, then click **Settings**.
3. Click **Web APIs** and display the Webhook tab. A list of webhooks appears; the webhooks are grouped as event webhooks or function webhooks.
4. For a function webhook, enter the URL where you want to send the POST requests. For an event webhook, enter one or more URLs. Separate multiple URLs with commas.

You must enter HTTPS URLs. Refer to Troubleshoot webhooks.

5. If the external system you are integrating with requires a username and password, enter your OIC credentials under Basic Authorization.
6. Click **Save**.

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