

Cloudfy Integration with Algolia

Cloudfy External Documentation



[illegible]

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Overview

Algolia is a third-party software that allows you to take the search functionality to the next level. Cloudfy integrates with Algolia, however, to implement Algolia you will require an account. The account will be managed and paid for by the user.

Algolia works off credits, should your credits run out Cloudfy will revert back to the Cloudfy search functionality to ensure your users still have the ability to search within the site.

1. Search Type

In the search settings under Site Setup > Site Settings > Search you will see a dropdown called 'Search Type', this should have two options: Cloudfy and Algolia.

The screenshot shows the 'Edit SiteSettings' page in the Cloudfy admin interface. The 'Search' tab is active. The 'Search Type' dropdown is highlighted with a yellow box and a yellow arrow pointing to it. The dropdown currently shows 'Cloudfy' selected, with 'Algolia' as an option. Other settings visible include 'Product Name', 'Customisable Search Text', 'Show thumbnail with predictive search results', 'Predictive Search with Attribute', 'Popular Search Keyword', 'Enable Icon For Phone Order Search', 'Default Search Results View', and 'Multi Language Conversion'.

This will need to be set to 'Algolia' to use the Algolia search functionality. When this is set to Cloudfy the Cloudfy search functionality will be used. These cannot be used together.

2. Algolia Credential Validation

Prior to being able to set Algolia up in Cloudfy, you will need to create an account with Algolia and set up an index for your products. Once this is done, the credentials will need to be added to Cloudfy.

Super Admin | Samanthi.Clemens@Cloudfy.Com

Edit SiteSettings

General Settings | Product Settings | Category Settings | Transactional Settings | Site Hierarchy | Unit of Sale | Search | User Roles / Permissions | Document Settings | Loyalty Ledger | Site Settings (Mobile) | Domains

Search Type: Algolia

API Key: [Field]

Search API Key: [Field]

Application ID: [Field]

Index Name: [Field]

Validate Credentials

Remove Secured API Key

Fields to push to Algolia

Standard Field	Push	Attribute Field	Push
SKU Code	☒	Halal Certified	☐
Product Name	☒	Vegetarian	☐
URL	☒	Gluten Free	☐
Roundel	☐	Product state	☐
Product Summary	☐	Kosher Certified	☐
Product Description	☐	Packing Quantity	☐
Product Description3	☐	Weight	☐
Product Description4	☐	Vegan	☐

Default Search Results View: Grid View

Multi Language Conversion: English (United Kingdom)

Download Algolia Data

Before Login | After Login

The following will need to be provided:

- API Key
- Search API Key
- Application ID
- Index Name

Once these credentials have been added, validate them to ensure the connection is working as expected:

Super Admin | Samanthi.Clemens@Cloudfy.Com

Edit SiteSettings

General Settings | Product Settings | Category Settings | Transactional Settings | Site Hierarchy | Unit of Sale | Search | User Roles / Permissions | Document Settings | Loyalty Ledger | Site Settings (Mobile) | Domains

Search Type: Algolia

API Key: [Field]

Search API Key: [Field]

Application ID: [Field]

Index Name: [Field]

Validate Credentials

Remove Secured API Key

Fields to push to Algolia

Standard Field	Push	Attribute Field	Push
SKU Code	☒	Halal Certified	☐
Product Name	☒	Vegetarian	☐
URL	☒	Gluten Free	☐
Roundel	☐	Product state	☐
Product Summary	☐	Kosher Certified	☐
Product Description	☐	Packing Quantity	☐
Product Description3	☐	Weight	☐
Product Description4	☐	Vegan	☐

Default Search Results View: Grid View

Multi Language Conversion: English (United Kingdom)

Download Algolia Data

Before Login | After Login

The screenshot shows the 'Edit SiteSettings' page in the Cloudfy Admin interface. The 'Product Data' tab is selected, and the 'Fields to push to Algolia' section is visible. A yellow arrow points to the 'Validate Credentials' button.

General Settings

Search Type: Algolia

Application ID: DQ4K60Y12

Index Name: Test Index

API Key: e32dbd66692994bdc3e322ba25

Search API Key: 476c0f8c3a3f92a39e6d3b0230P82

Validate Credentials

Remove Secured API Key

Product Data

Integration Schedule

Logs

Fields to push to Algolia

Standard Field	Push	Attribute Field	Push
Product Description3	☐	Halal Certified	☐
Product Description4	☐	Vegetarian	☐
Product Description5	☐	Gluten Free	☐
Product Description6	☐	Product state	☐
Is New	☐	Kosher Certified	☐
Is Best Deal	☐	Packing Quantity	☐
Is Special Offer	☐	Weight	☐
UPC	☐	Vegan	☐
Weight	☐		

Download Algolia Data

Before Login After Login

Default Search Results View

Grid View

Multi Language Conversion

English (United Kingdom)

English (United Kingdom)

3. Product Data

Once we have confirmed your credentials are valid, we can start to configure Algolia within Cloudfy.

We first need to configure the product data settings. This will determine which fields we pass to Algolia based on the products that exist in Cloudfy.

The fields that are greyed out are mandatory and will always be passed to Algolia.

The screenshot shows the 'Edit SiteSettings' page in the Cloudfy Admin interface. The 'Product Data' tab is selected, and the 'Fields to push to Algolia' section is visible. A yellow box highlights the 'Standard Field' section.

General Settings

Search Type: Algolia

Application ID: DQ4K60Y12

Index Name: Test Index

API Key: e32dbd66692994bdc3e322ba25

Search API Key: 476c0f8c3a3f92a39e6d3b0230P82

Validate Credentials

Remove Secured API Key

Product Data

Integration Schedule

Logs

Fields to push to Algolia

Standard Field	Push	Attribute Field	Push
Sku Code	☐	Halal Certified	☐
Product Name	☐	Vegetarian	☐
URL	☐	Gluten Free	☐
Roundel	☐	Product state	☐
Product Summary	☐	Kosher Certified	☐
Product Description	☐	Packing Quantity	☐
Product Description3	☐	Weight	☐
Product Description4	☐	Vegan	☐

Download Algolia Data

Before Login After Login

Default Search Results View

Grid View

Multi Language Conversion

English (United Kingdom)

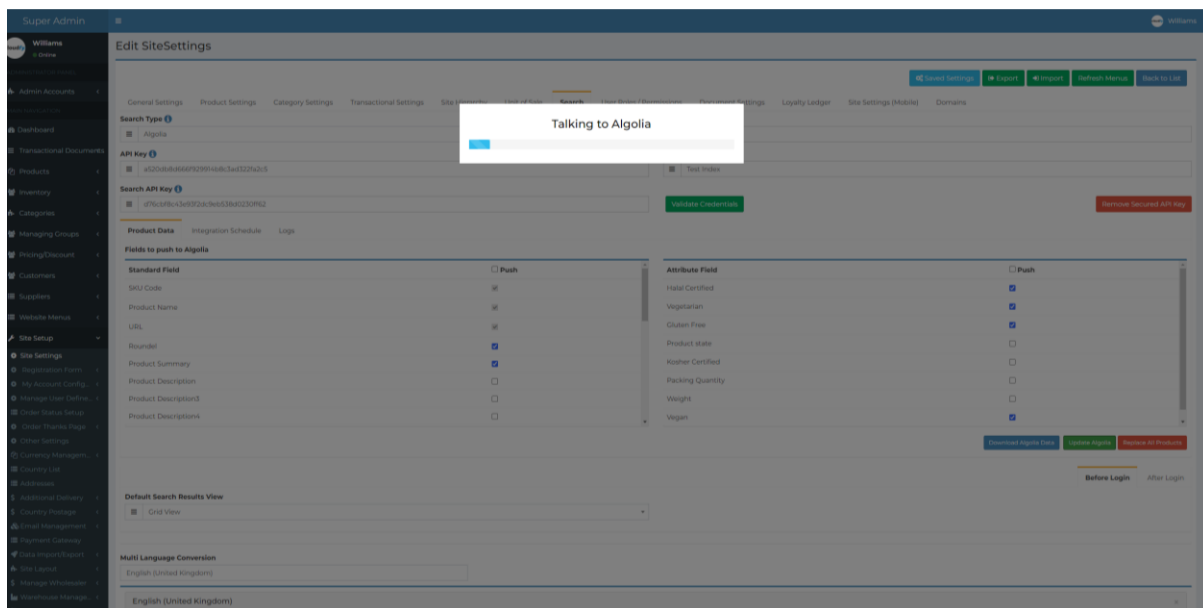
English (United Kingdom)

We also have the option of pushing attribute data to Algolia which can be configured in the second section.

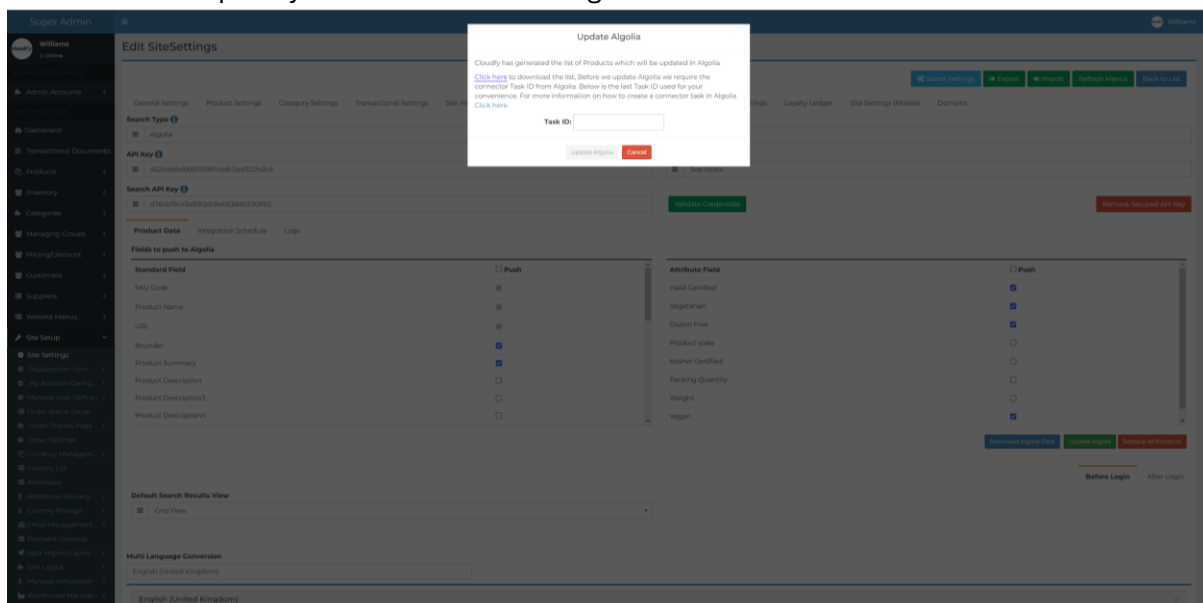
4. Update Alogia

Once the fields are configured, we will select 'Update Algolia' to push the products and their fields into Algolia.

You will see the following while this is happening:

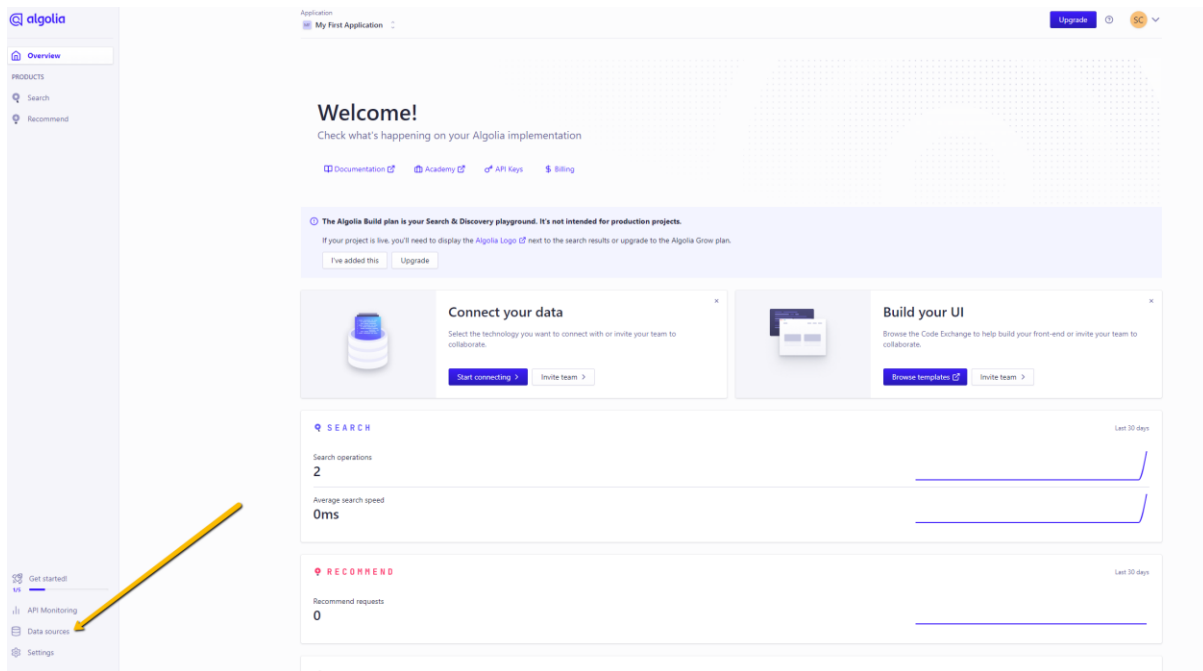


Once this is complete you will see the following:

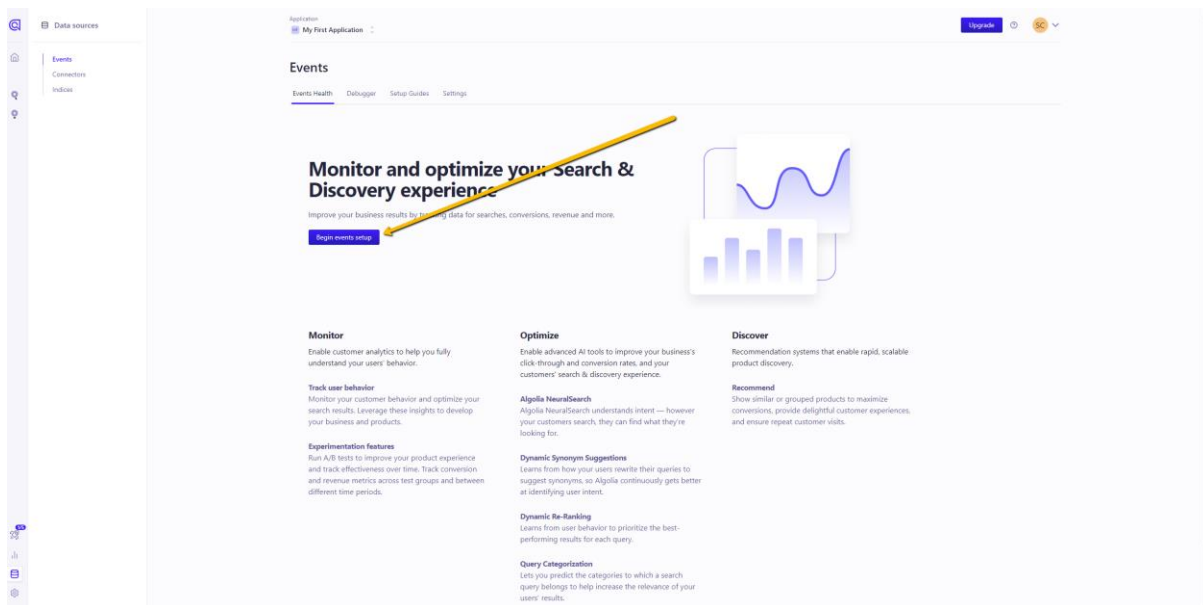


Once this is complete, you will need to follow these steps in Algolia:

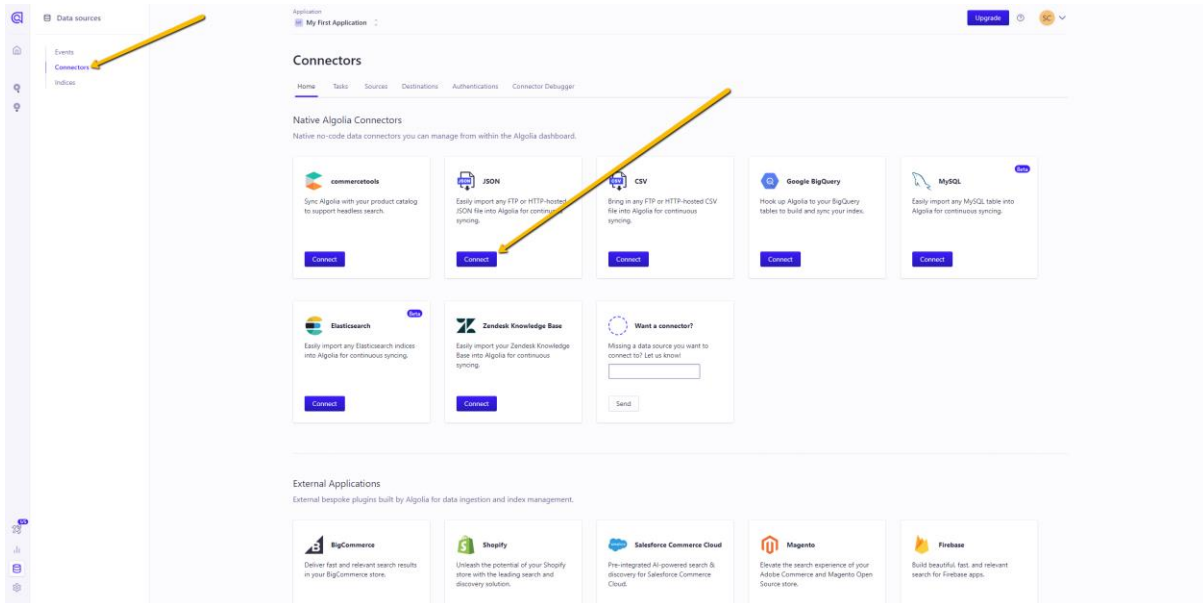
- Login to Algolia and navigate to 'Data Sources'



➤ Select 'Begin Events Setup'

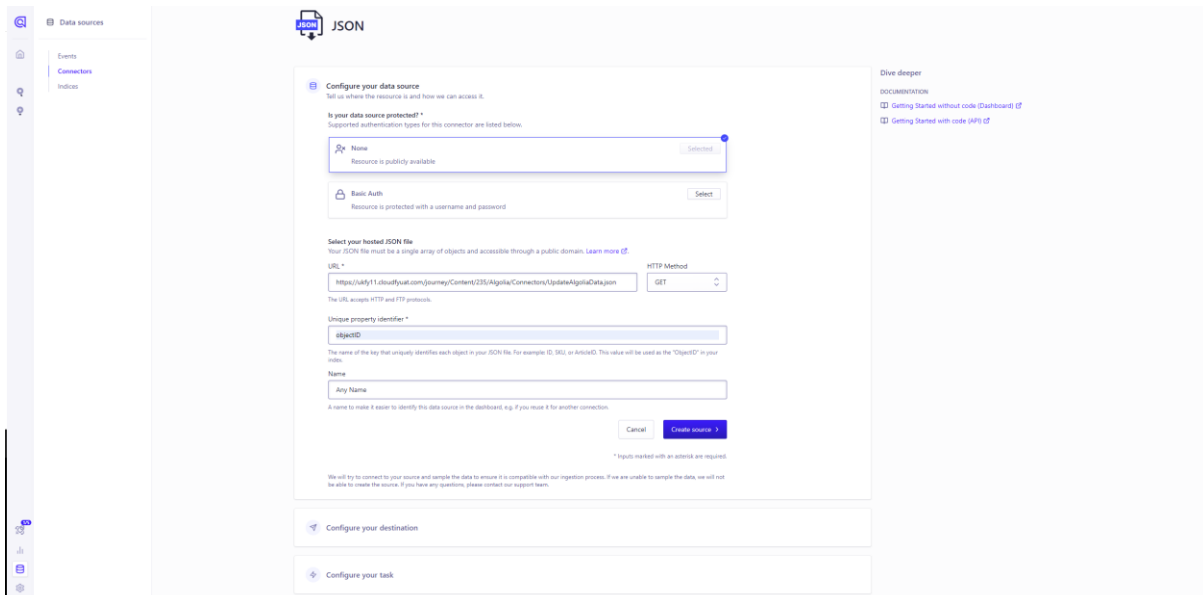


➤ Select 'Connectors' and then 'Connect' on the JSON tile



➤ In the JSON page we will need to configure the following:

- Select 'None' under 'Configure your data source'
- Set the URL to https://ukfy11.cloudfyuat.com/*SITENAME*/Content/*SITEID*/Algolia/Connectors/UpdateAlgoliaData.json (This will be provided by Cloudfy)
- Set the 'Unique property identifier' to 'objectId'
- Set the 'Name' to anything you want.



➤ Once all of the above steps are complete, the select 'Create source'

The screenshot shows the 'Configure your data source' step for a JSON connector. The interface includes a sidebar with 'Data sources', 'Events', 'Connectors', and 'Indices'. The main content area has a 'JSON' header and a 'Configure your data source' section. This section contains fields for 'Name' (set to 'Resource is publicly available'), 'Basic Auth' (set to 'Resource is protected with a username and password'), 'URL' (set to 'https://a1fy11.cloudfy.ai.com/journey/Content/235/Algolia/Connectors/UpdateAlgoliaData.json'), 'HTTP Method' (set to 'GET'), 'Unique property identifier' (set to 'objectId'), and 'Name' (set to 'Any Name'). A yellow arrow points to the 'Create source' button. Below the main form are sections for 'Configure your destination' and 'Configure your task'. A 'Dive deeper' sidebar on the right contains links to 'DOCUMENTATION', 'Getting Started without code (Dashboard)', and 'Getting Started with code (API)'.

Once this is complete, you will need to select your index from the dropdown. You will need to click 'Create for me' under the index credentials, and then select create destination.

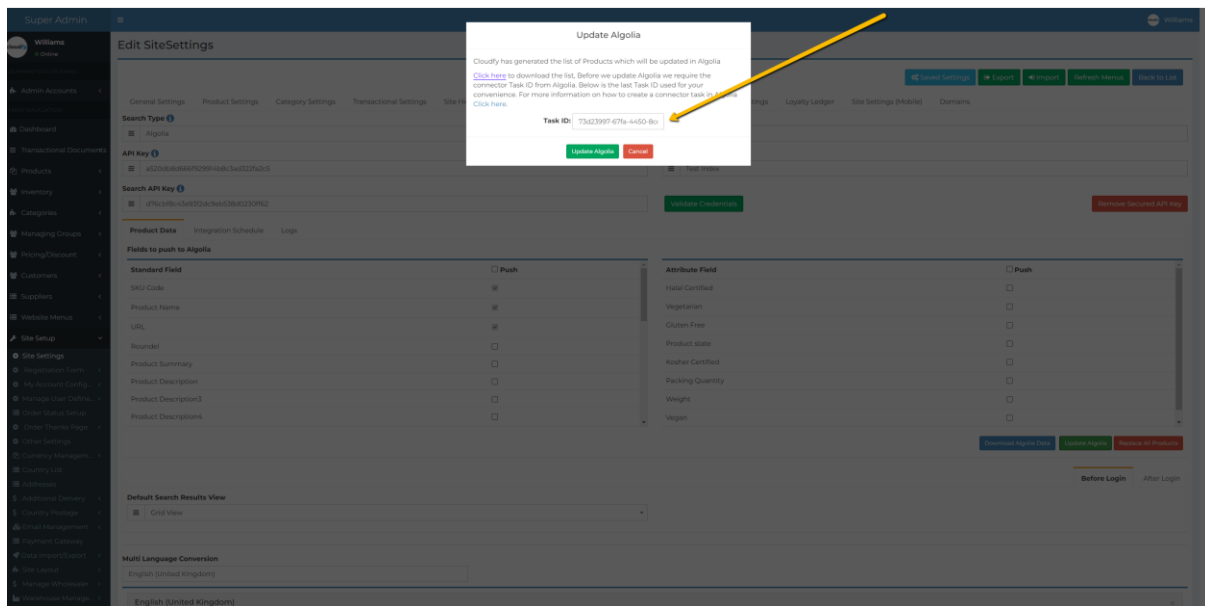
The screenshot shows the 'Configure your destination' step for a JSON connector. The interface includes a sidebar with 'Data sources', 'Events', 'Connectors', and 'Indices'. The main content area has a 'JSON' header and a 'Configure your destination' section. This section contains a 'Search' field (set to 'Test Index'), a 'Which product do you want to target?' dropdown (set to 'Auto-generated Authentication for DQ4X56Y12 - 171589303045'), and a 'Name' field (set to 'Index Test Index - 171589303045'). A 'Create destination' button is visible. Below the main form is a section for 'Configure your task'. A 'Dive deeper' sidebar on the right contains links to 'DOCUMENTATION', 'Getting Started without code (Dashboard)', and 'Getting Started with code (API)'.

After the destination has been created, the task needs to be configured.

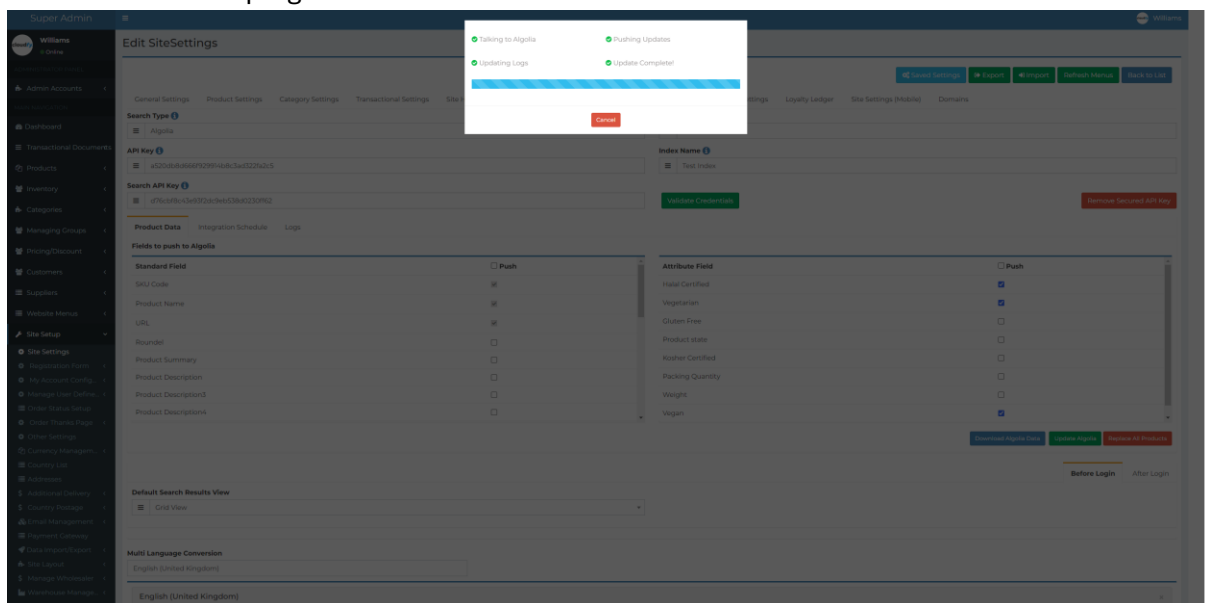
The screenshot shows the Algolia dashboard interface. On the left, there's a sidebar with 'Data sources', 'Events', 'Connectors', and 'Indices'. The main area is titled 'JSON' and contains three configuration sections: 'Configure your data source', 'Configure your destination', and 'Configure your task'. The 'Configure your task' section is active, showing options for 'When should we fetch your data?' (On demand, Scheduled) and 'What should we do with your data?' (Replace, Save, Partial update). The 'On demand' and 'Save' options are selected. At the bottom, there are 'Cancel' and 'Create task' buttons. A small note at the bottom right says '*Inputs marked with an asterisk are required'.

Select 'On Demand' and 'Save', then create task. You will then be provided with a task ID from Algolia, this needs to be entered in Cloudfy:

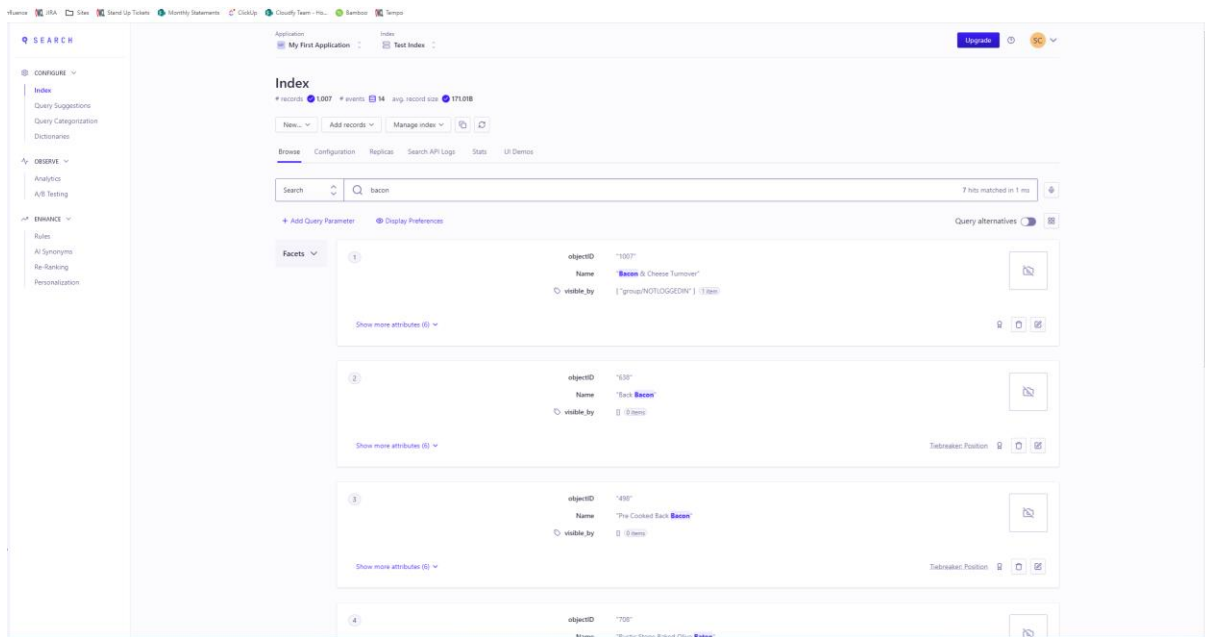
The screenshot shows the Cloudfy dashboard interface. On the left, there's a sidebar with 'Data sources', 'Events', 'Connectors', and 'Indices'. The main area is titled 'Connectors' and contains a 'Tasks' table. A modal dialog titled 'Edit task' is open, showing the same configuration options as the Algolia dashboard. The 'On demand' and 'Save' options are selected. At the bottom, there are 'Cancel' and 'Update task' buttons. A small note at the bottom right says '*Inputs marked with an asterisk are required'.



Click 'Update Algolia'. While Algolia is being updated you will see the following to provide information on the progress:



When this is complete, the updates will then be visible within the index in Algolia:

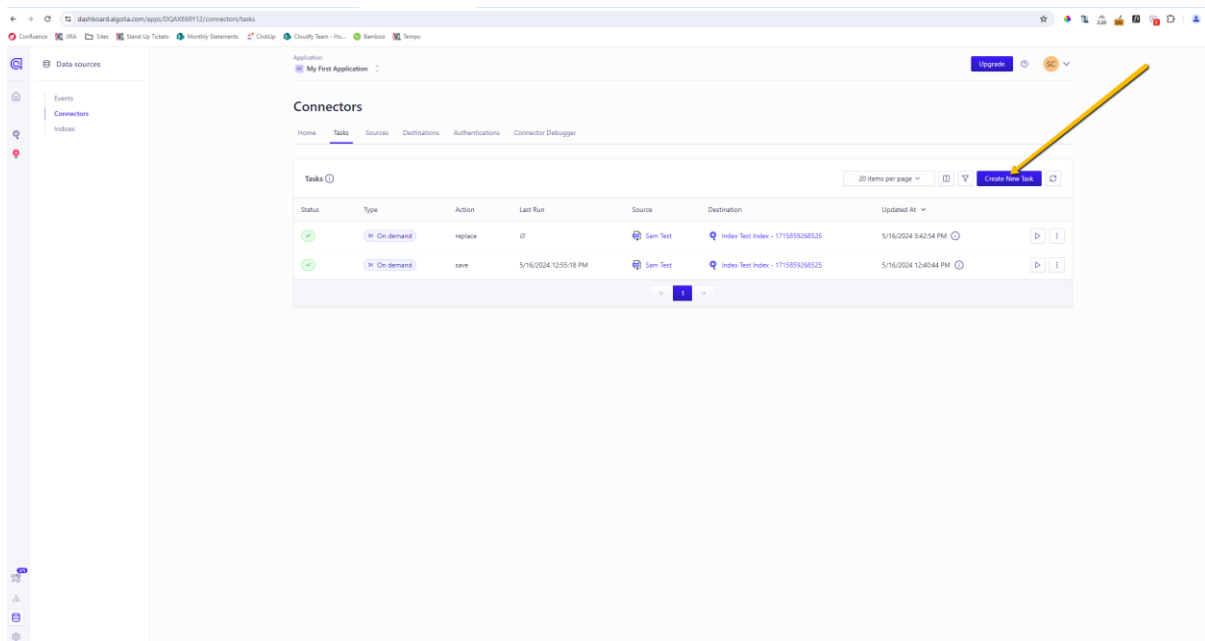


5. Replace All Products

From within Cloudfy we have the ability to replace all of the product data within the Algolia index with the data from Cloudfy.

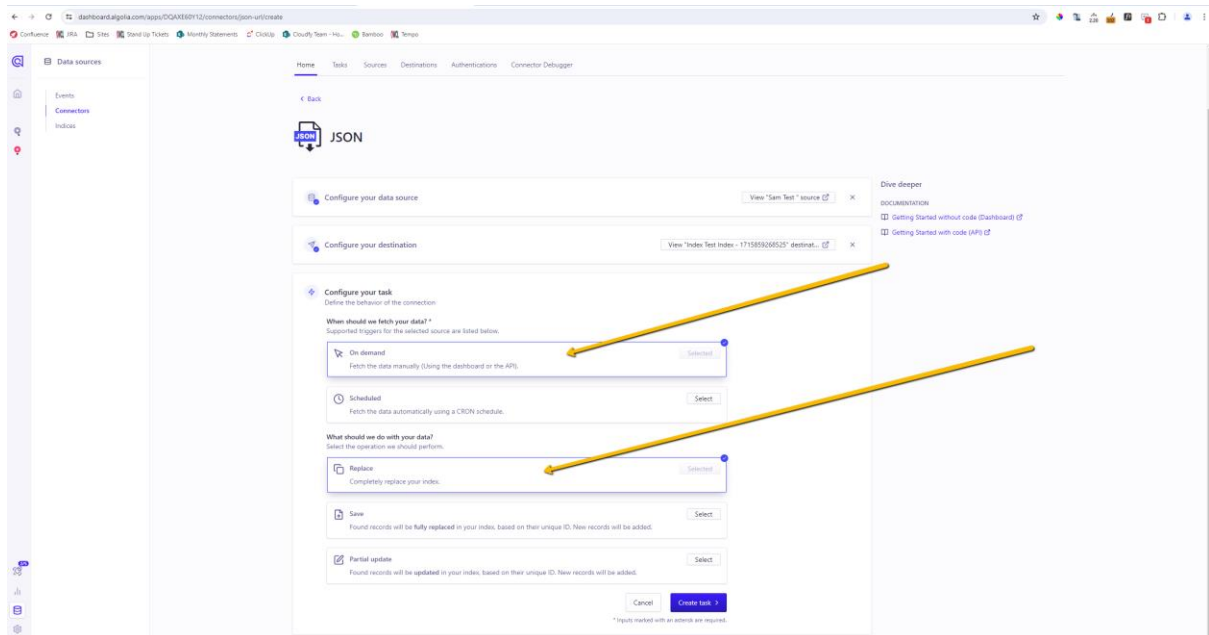
To do this we first need to set up a new task in Algolia by following these steps:

- Select 'Data Sources'
- Select 'Connectors'
- Select 'Tasks' and click 'Create new task'



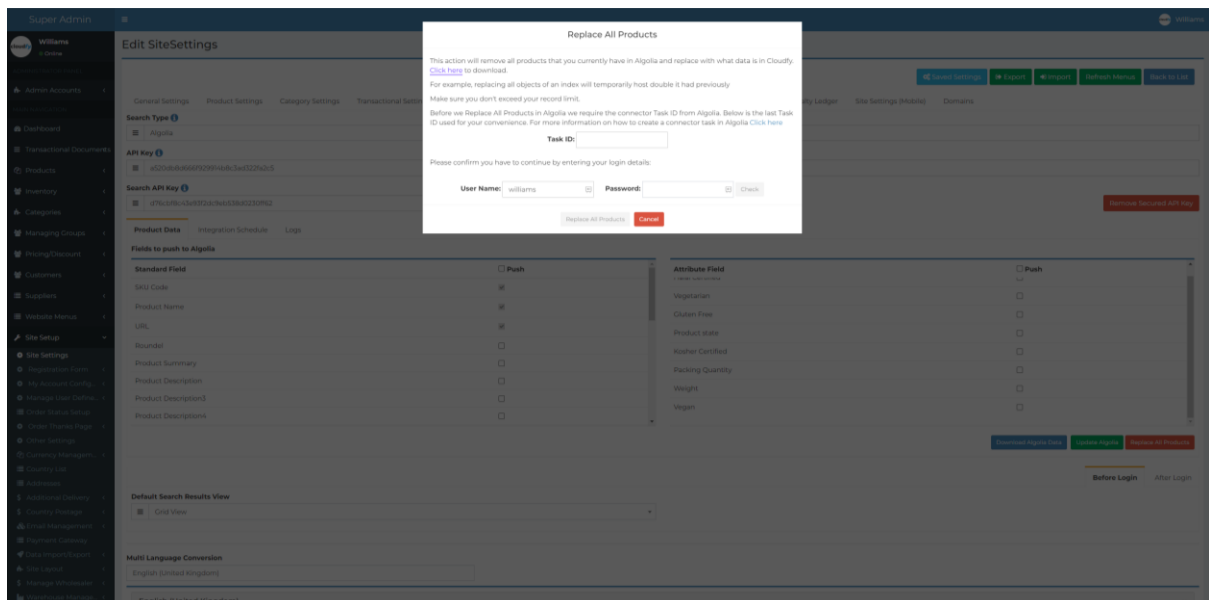
- Select 'Connect' on the JSON tile.
- When configuring your data source, select the same source you used in the previous steps.

- When configuring your destination, select the same destination you used in the previous steps.
- When configuring your task, select 'On demand' and 'Replace'



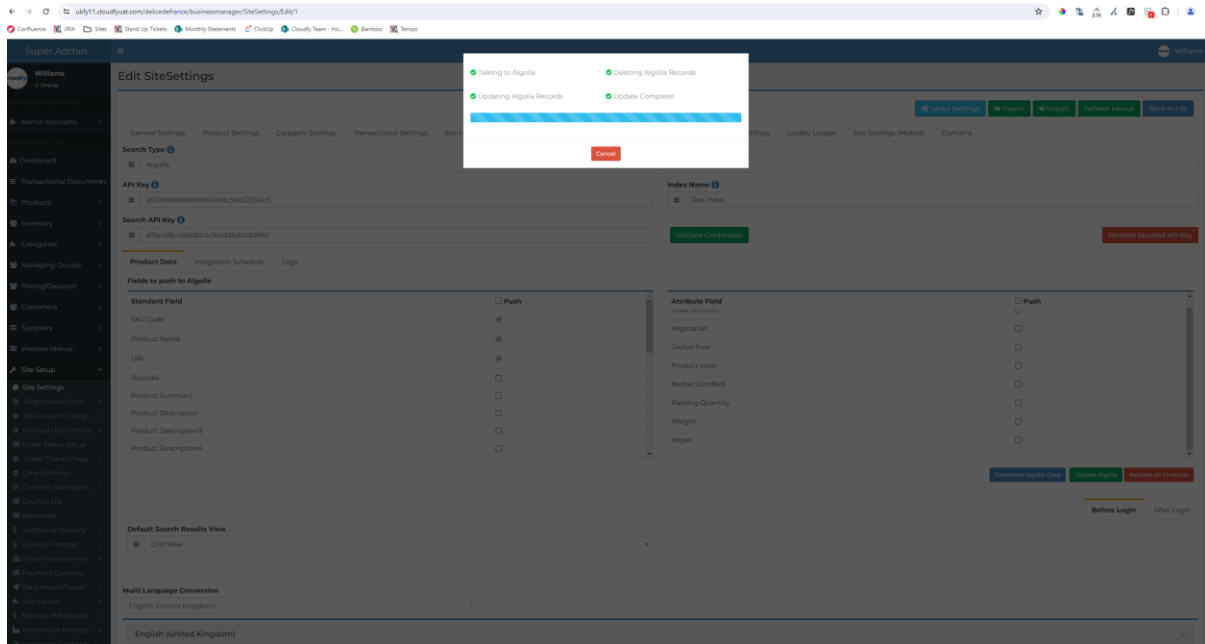
- Create the task & copy the task ID as it will be needed in the next steps in Cloudfy.

Now that the required task has been setup in Algolia, the rest can be done from Cloudfy. Select 'Replace All Product'. When this is selected the user will see the following:



To be able to proceed with this task you will need to enter your Algolia task ID created in the above steps, as well as your Cloudfy admin account user name and password (To be reviewed now that we are using SSO).

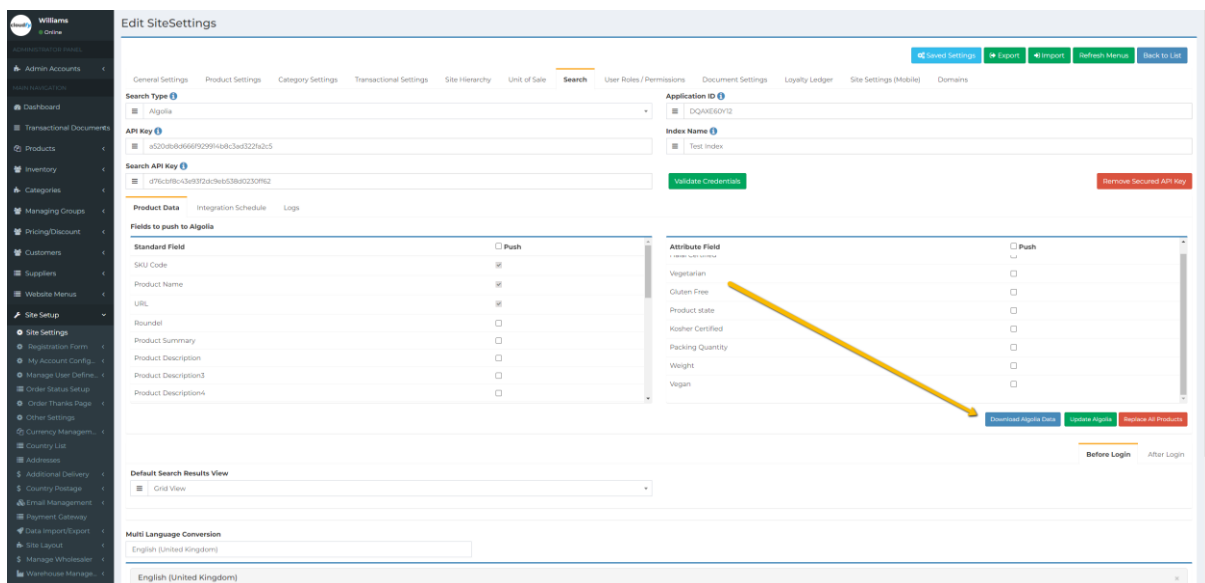
Once the credentials have been checked, you will be able to select 'Replace All Products'. The progress of this task will be visible:



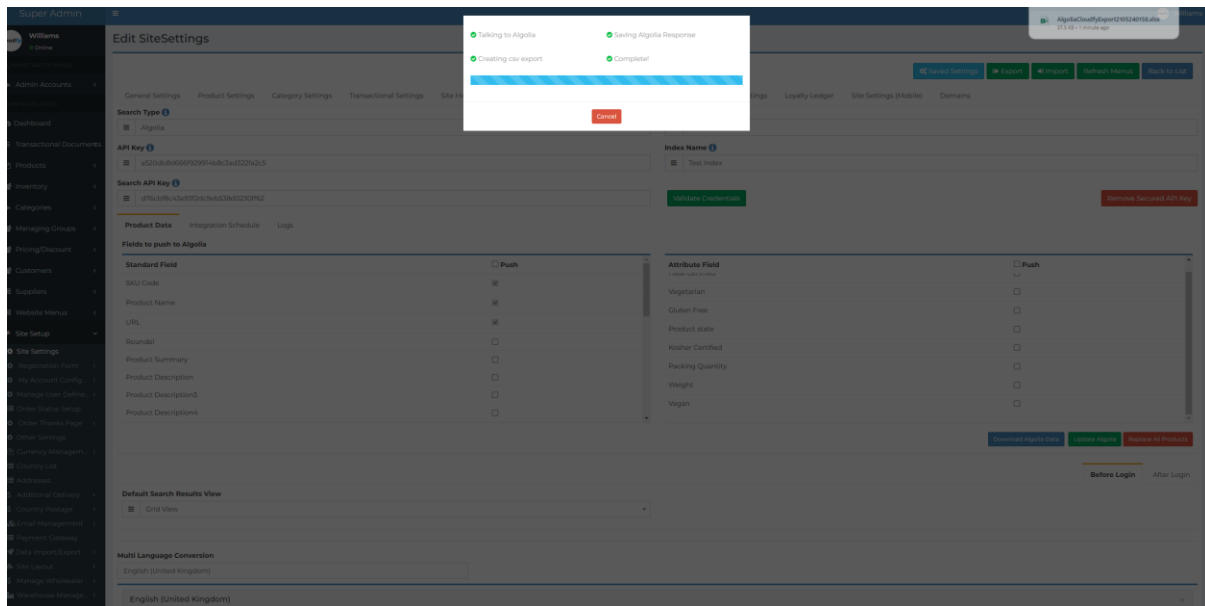
Once this is done, all products in Algolia will have been replaced by the products pushed in from Cloudfy.

6. Download Algolia Data

To see what data is in Algolia, select 'Download Algolia Data' in Cloudfy.



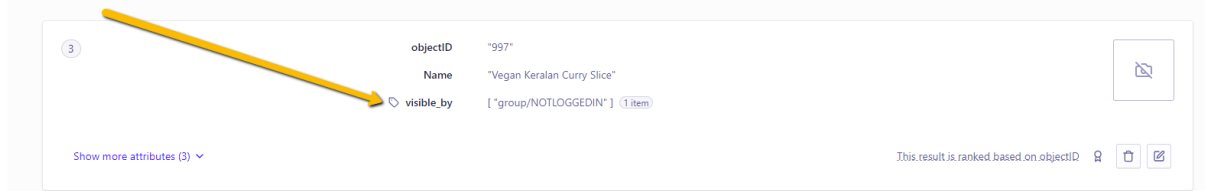
While this is processing you will receive updates in Cloudfy:



When this is complete, an excel document will be downloaded to your machine. This file will by default always have 5 columns, the Name, Product ID, SKU, Cloudfy product URL, and the Algolia Object ID. If additional product data exists within Algolia (attributes, etc), it will also be present in this file.

7. Restricted Products

When restricted products are enabled, you will see this reflected in Algolia in the 'visible by' tag.

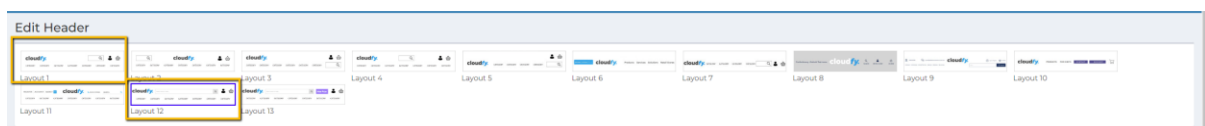


This will show you the group, or customers who have access to this product, and will only return this product in the search results for these customers/groups.

The Algolia data will need to be updated every time a new restriction is added/removed to ensure this tag is updated and the correct search results are returned to the customers.

8. Front End

To use Algolia the header layout 1 or 12 needs to be selected.



Once the required header layout is selected, the user will be able to search from products on the front end using Algolia.

The search bar will now have a microphone button, this allows for voice search.



When searching, you can now search using any of the details pushed to Algolia and should see results back instantly.

Note: Please keep in mind that currently pushing data to Algolia is manual and will need to be done when adding new products, restrictions, or product data that you would like in Algolia. Creating an integration schedule to eliminate this manual process is our next goal with Algolia.

If you have any questions about the set up or use of Algolia with Cloudfy please raise a ticket with the support team.