



CHEETAH DIGITAL

Use of Customer ID

Technical Guide

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Overview

The Customer ID is a parameter that can be used as a unique identifier to enter Cheetah Experience instead, or in addition to, an email address. There are **a couple of methods that can be used to pass the external identifier to an Experience** based on whether the experience is embedded in a parent web container, or if it is published as a standalone microsite with a unique URL, or using a custom domain.

In addition to the Customer ID, Customer ID Type may be defined as a secondary parameter as well. This parameter can be helpful when differentiating between different types of user IDs that you may be using in your data system (i.e. user token, user ID, member ID, loyalty member ID, etc.). This value will be important when trying to look up users by the ID and it will be used in conjunction with the configuration of your data integration and data mappings.

The Customer ID will be recorded as part of the entry, visible in the Entry Details screen and made available for retrieval through exports (Data Export, Winner Export, Redemptions Export) as well as scheduled exports, Export API and the Webhook.

This technical document aims to explain the available methods to pass the unique identifier to the experience and further explores the use cases. Please note that the **Customer ID and Customer ID Type must be a string of alphanumeric characters, and may also contain hyphens and underscores**. All other characters will be removed from the ID.



Macro Experiences

Depending on the desired publishing method used, there are a few ways to pass the Customer ID to a Macro Experience. Please select your publishing method and then find the corresponding instructions in the relevant sub-section.

Microsite

Set the external Customer ID via the query string parameter `nc.customerid` and the optional Customer ID Type with `nc.customeridtype`. Please note that the parameter names must start with `nc.` to avoid CDN caching, and a console error will show if the `nc.` is not included and the values will not be passed to Cheetah Experiences. This method of setting the external identifier is most useful for a Microsite.

Examples

```
https://ngx.me/3QJdNOD?nc.customerid=123-4b
```

```
https://ngx.me/3QJdNOD?nc.customerid=123-4b&nc.customeridtype=type-1
```

Custom Domain

Set the Customer ID via the query string parameter `nc.customerid` on the Custom Domain URL. Cheetah Experiences will dynamically create a wrapper page, which will pass the external identifier from the query string to the experience.

You may optionally set the Customer ID Type with the query string parameter `nc.customeridtype`.

Please note that the parameter names must start with `nc.` and the string values must be alphanumeric and may also contain hyphens and underscores.

Examples

```
https://www.yourCustomDomain.com?nc.customerid=123-4567b
```



```
https://www.yourCustomDomain.com?nc.customerid=123-4567b&nc.customeridtype=type-1
```

Web Embed

For an embedded experience, copy the Embed Code from the Cheetah Experience publishing section, and place it in your parent page. You may use either the normal or Advanced Embed Code. Once the API is loaded and the page is finished rendering, you may set and get the customer ID through the Cheetah Experiences API using JavaScript.

Setting the external customer ID

From the parent page, you may set the external customer identifier via the `'setCustomerID'` API function. You will want to ensure that the API has completed loading. You could use an `onLoad` callback on the embed iframe, or listen for the application ready call with

```
NGX.Embed.registerEventHandler('app:ready', callback)
```

Parameters

Parameter	Details
customerid String	User-defined customer id value. Alphanumeric string, which may also contain hyphens and underscores
customeridType String	Optional. User-defined customer id type. Alphanumeric string, which may also contain hyphens and underscores

Examples

```
NGX.Embed.setCustomerID('test123');  
NGX.Embed.setCustomerID('test123', 'type1');
```



Getting the external customer ID

From the parent page, you may retrieve the currently-set external customer identifier via the `getCustomerID` API function. The value will be returned through the use of a callback function.

Parameters

Parameter	Details
callback function	Callback function will receive the currently-set customer id as its input parameter.

Example

```
NGX.Embed.getCustomerID( (id) => {  
  console.log('The current customer ID is ', id);  
});
```

This would output the following to the browser console, based on the ID set above:

```
The current customer ID is test123
```



Setting the Customer ID using Custom Javascript area

The Customer ID may also be obtained and set from the Custom Javascript settings area, which may be found on an Experience's Customize tab under Advanced. Please note that these methods are not intended for use for an Experience that is embedded on a parent page.

Setting the external Customer ID

From within the experience, you may set the external customer identifier via the `setCustomerID` API function.

Parameters

Parameter	Details
customerId <i>String</i>	User-defined customer id value. Alphanumeric string, which may also contain hyphens and underscores
customerIdType <i>String</i>	Optional. User-defined customer id type. Alphanumeric string, which may also contain hyphens and underscores

Examples

```
NGX.App.api.setCustomerID('test123');  
NGX.App.api.setCustomerID('test123', 'type1');
```



Getting the external customer ID

From within the experience, you may retrieve the currently-set external customer identifier via the `getCustomerID` API function. The value will be directly returned.

Returns

Return value	Details
customerid <i>string</i>	A string value containing the current customer id, or 'undefined' if it has not been set.

Example

```
var myID = NGX.App.api.getCustomerID();
```



Micro Experiences

Depending on the desired publishing method used, there are a few ways to pass the Customer ID to a Micro Experience. Please select your publishing method and then find the corresponding instructions in the relevant sub-section. All API methods are accessed via the following syntax:

```
NGX.api(<method>, <arguments>)
```

Social Story

Set the external Customer ID via the query string parameter `nc.customerid`. You may optionally set the Customer ID Type with the query string parameter `nc.customeridtype`. Please note that the parameter names must start with `nc.` to avoid CDN caching, and a console error will show if the `nc.` is not included and the values will not be passed to Cheetah Experiences. This method of setting the external identifier is most useful for a Social Story and the method is identical to the Macro Experiences Microsite approach.

Examples

```
https://ngx.me/3QJdNOD?nc.customerid=123-4b  
https://ngx.me/3QJdNOD?nc.customerid=123-4b&nc.customeridtype=type-1
```

Custom Domain

Set the Customer ID via the query string parameter `nc.customerid` on the Custom Domain URL. Cheetah Experiences will dynamically create a wrapper page, which will pass the external identifier from the query string to the experience.

You may optionally set the Customer ID Type with the query string parameter `nc.customeridtype`.



Please note that the parameter names must start with `nc.` and the string values must be alphanumeric and may also contain hyphens and underscores.

Examples

```
https://www.yourCustomDomain.com?nc.customerid=123-4b  
https://www.yourCustomDomain.com?nc.customerid=123-4b&nc.customerid  
type=type-1
```

Web Embed

For an embedded experience, copy the Embed Code from the Cheetah Experience publishing section, and place it in your parent page. You may use either the normal or Advanced Embed Code. Once the API is loaded and the page is finished rendering, you may set and get the customer ID through the Cheetah Experiences API using JavaScript. The API interface for Micro Experiences is slightly different from Macro Experiences.

Setting the external customer ID

From the parent page, you may set the external customer identifier by sending the `'form:set:customerid'` API method name and the customer identifier. You will want to ensure that the iframe and API have completed loading. You could use an `onLoad` callback on the embed iframe, or listen for the API ready call with `NGX.api('event:listen', 'embed:api:ready', (event) => { })`

Parameters

Parameter	Details
method name String	'form:set:customerid' - tells the api what method to execute.
customerid String	User-defined customer id value. Alphanumeric string, which may also contain hyphens and underscores



customerIdType String	Optional. User-defined customer id type. Alphanumeric string, which may also contain hyphens and underscores
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Examples

```
NGX.api('form:set:customerid', 'jane-doe-123ABC');
NGX.api('form:set:customerid', 'jane-doe-123ABC', 'type-1');
```

Getting the external customer ID

From the parent page, you may retrieve the currently-set external Customer ID via the `'form:get:customerid'` API method name and a callback function. The value will be returned through the callback function.

Parameters

Parameter	Details
method name String	'form:get:customerid' - tells the api what method to execute.
callback function	Callback function will receive the currently set customer id as its input parameter.

Example

```
NGX.api('form:get:customerid', (id) => {
  console.log('The current customer ID is ', id);
});
```

This would output the following to the browser console, based on the id set above:



The current customer ID is **jane-doe-123ABC**

Setting the Customer ID using Custom Javascript area

The customer ID may also be obtained and set from the Custom Javascript settings area, which may be found on an experience's Customize tab. Please note that these methods are not intended for use for an Experience that is embedded on a parent page.

Setting the external customer ID

From within the experience, you may set the external customer identifier via the `'form:set:customerid'` API function.

Parameters

Parameter	Details
customerid String	User-defined customer id value. Alphanumeric string, which may also contain hyphens and underscores
customeridType String	Optional. User-defined customer id type. Alphanumeric string, which may also contain hyphens and underscores

Examples

```
NGX.api('form:set:customerid', 'jane-doe-00');  
NGX.api('form:set:customerid', 'jane-doe-00', 'type-1');
```



Getting the external customer ID

From within the experience, you may retrieve the currently-set external customer identifier via the `'form:get:customerid'` API function. The value will be directly returned.

Returns

Return value	Details
customerid string	A string value containing the current customer id, or 'undefined' if it has not been set.

Example

```
var myID = NGX.api('form:get:customerid');
```

Customer ID Type

`nc.customeridtype` can be defined as a secondary parameter in addition to `nc.customerid`. This parameter can be helpful when differentiating between different types of user IDs that you may be using in your data system (i.e. user token, user ID, member ID, loyalty member ID, etc.). This value will be important when trying to look up users by the ID and it will be used in conjunction with the configuration of your data integration and data mappings.

It is an alphanumeric string that can include hyphens and/or underscores. It can be set using the three methods mentioned above. See examples below:

Dawn to add examples of the API call and the querystring





Browser Support

The external identifier is sent to and from the experience API via postMessage. postMessage has been supported in Firefox since version 3, Chrome since 1, Safari since 4, Opera since 9 and IE since version 8. All mobile browsers also support postMessages.

The only limitation in versions eight, nine and ten of Internet Explorer are that messages cannot be sent across tabs or windows. They are supported between frames, which is our use case.