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Optimizely Opal Solution - Instructions to Run

1. Prerequisites

- Optimizely CMS & Commerce: Install CMS 12 and Commerce 14 (built on .NET 6/8).

- Optimizely CLI: Required to create a Commerce Connect starter project.

- Opal Instance: Provision an Opal account with Admin role enabled.

- Ngrok: To expose your local Commerce API endpoints publicly for Opal discovery.

- Optimizely Opal SDK for C#: Install via NuGet for tool development.

2. Environment Setup

1. Create a Commerce Starter Project:

   dotnet new commerce --name CommercePromotionManager

   (Optionally install Foundation for sample data.)

2. Configure CMS/Commerce:

   - Ensure promotions and campaigns work in the local environment.

   - Validate EPiServer Commerce Marketing API availability.

3. Expose Local Instance:

   ngrok http 5000

   Use the generated public URL for Opal tool discovery.

3. Implement Promotion Management Tools

- Use Optimizely Opal C# SDK to define tools:

  - Create Promotion

  - Update Promotion

  - Delete Promotion

  - Retrieve Promotion

  - Enable/Disable Promotion

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4. Configure Opal Discovery Endpoint

- Add /opal/discovery in your Commerce app to expose tool metadata.

- Ensure JSON schema includes:

  - Tool IDs

  - Input/Output parameters

  - Authentication details (Bearer token).

5. Set Up Opal Specialized Agent

- Agent Type: Specialized Agent.

- Purpose: Interpret natural language and call promotion tools.

- Definition:

  - Declare allowed tools and variables (market, currency, campaign).

  - Add confirmation patterns and validation hints.

- Use examples from opal-agent-examples for JSON/YAML structure.

6. Register Tools in Opal

- Go to Opal Admin → Tools → Registries.

- Add your Commerce app's discovery endpoint.

- Sync metadata (refresh after schema changes).

7. Run the Workflow

- Start Commerce app locally.

- Start ngrok tunnel.

- Register tools in Opal.

- Use Opal Chat to trigger commands like:

  @promotions create a promotion with name "10% discount on order amount above 80000"

- Verify promotion creation in Commerce Marketing UI.