



# Salesforce Service Cloud Use Case

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## SFSC Connector - Managing SessionM Customer Data in Salesforce Service Cloud

### Abstract

This use case demonstrates how you manage SessionM loyalty data for a customer from Salesforce Service Cloud.

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# *About the SessionM Integration with Salesforce Service Cloud*

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The Salesforce Service Cloud (SFSC) is a customer service platform that provides a comprehensive view for a specific customer across case management, omni-channel routing, macros, and other customer service tools to assist Service Cloud agents with customer inquiries.

SessionM integrates marketing automation and data management capabilities with loyalty marketing to drive personalized consumer relationships through mobile devices and across channels. SessionM integrates with SFSC to create a unified, loyalty-focused customer profile.

By connecting loyalty, brands can award points for purchases, manage a reward store, encourage status and tiering, manage closed loop offers, and run refer-a-friend programs. With SessionM, all of this messaging and offer management happens in real time.

This integration provides an up-to-date view into the status of the customer in the SessionM-powered loyalty program. It also gives Service Cloud agents the ability to perform service-oriented activities such as awarding loyalty points and appending service notes to a SessionM customer profile.

To configure the integration, please follow the instructions in the [admin guide](#).

## *Onboarding Customers*

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When a customer joins Salesforce after SessionM has been integrated into SFSC, a record for that user is created in the SessionM platform. Whether that customer is automatically enrolled in the loyalty programs depends on the setting selected for the **Sync Customer Changes with SessionM** box during the configuration.

- If this box is selected, then the customer is automatically created in the SessionM platform. The value selected on the **Enroll in Loyalty** box determines whether the customer is included in the loyalty program.
- If this box is not selected, customers have to be manually enrolled in the loyalty programs. See [Enroll a Customer in a Loyalty Program](#) for instructions.

# *Synchronizing Customer Data*

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The customer data can be configured to synchronize between the two platforms either automatically or manually. You can choose which data to sync by configuring the field mapping.

## From Salesforce to SessionM

There are two ways to send customer updates from Salesforce to SessionM:

- By using the SessionM Customer Profile component – see [View and Update Customer Information](#) and [Enroll a Customer in a Loyalty Program](#) in the next section.

Any changes done in this component will automatically be sent to the SessionM Platform. The parent record will also be updated with the new data if there is any corresponding field mapping configured.

- By creating or editing an **Account** or **Contact** record, depending on the setting selected for the **Parent Object** dropdown during the configuration, when:
  - A corresponding field mapping is configured
  - The **Sync Customer Changes with SessionM** box is checked during the configuration

If the **Sync Customer Changes with SessionM** box is not checked, then the Account or Contact updates are not sent to SessionM. The SessionM Customer Profile component needs to be used to manually send the updates (see point 1 above).

## From SessionM to Salesforce

To sync the customer data in Salesforce from the SessionM Platform, the SessionM Customer Profile component needs to be loaded on the corresponding **Account** or **Contact** page. If the **Auto Sync from SessionM Loyalty** box is checked during the component configuration, then the sync will happen automatically on component load. Otherwise, the data will be synced once the **Sync from SM** button is pressed.

## Supported Tasks

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When you look up a customer account in SFSC, the SessionM/Salesforce integration searches for that customer using the email or external ID, depending on the setting selected for the **Search by External ID** box during SessionM configuration. If the customer is found, the data is displayed as shown below. If the customer is not found, you can enroll the user. See [Enroll a Customer in a Loyalty Program](#) for instructions.


The customer data is displayed on **Account** or **Contact** pages, depending on setting selected for the **Parent Object** dropdown during SessionM configuration.

1. On the SFSC home page, select **Accounts** (or **Contacts**).
2. Select an account (or contact) to display the loyalty data.

















The loyalty data is displayed in several components containing demographic information and loyalty program information. Use each component to launch related loyalty program tasks for the current customer.

## View and Update Customer Information

Use the custom SessionM Customer Profile component to view demographic information and customer lifetime value. To update the profile:

1. Click on any  edit symbol next to editable fields.
2. Change the customer information as needed.
3. Select **Save**.

## Customer Loyalty Profile

First Name 	Email 
Sabina 	sabina@sessionm.com 
Last Name 	Member Status 
Sabina 	Good 
Gender 	Opted-In 
Unknown 	<input checked="" type="checkbox"/> 
Date of Birth 	Suspended 
8/29/2001 	<input type="checkbox"/> 

> Address

> Customer Lifetime Value

> SessionM Timestamps

## Enroll a Customer in a Loyalty Program

If the customer record for which you are searching does not exist in the SessionM platform, you are prompted to enroll that customer. Click Enroll to create a record for that customer in SessionM. This creates a user with the email address and the SessionM external ID provided in the Account or Contact record. If the SessionM external ID is empty, it automatically takes the value of the Salesforce Account or Contact ID.

### Customer Loyalty Profile


User is not enrolled in the Loyalty Program. Please click on 'Enroll' button to enroll the user.

External Id : 001J000002XWxUmIAL

Email : ash.sm@sessionm.com

## Merge Customers

When you merge records in Salesforce, the corresponding customers are also merged in SessionM, if the **Merge in SessionM on Parent Merge** box is checked during the configuration. Any data changes will be kept in sync from the survivor record in Salesforce to the survivor customer in SessionM.

 The customer survivorship in SessionM is determined based on the email or external ID (depending on the setting selected for the **Search by External ID** box during the configuration) saved on the survivor record in Salesforce after the merge.

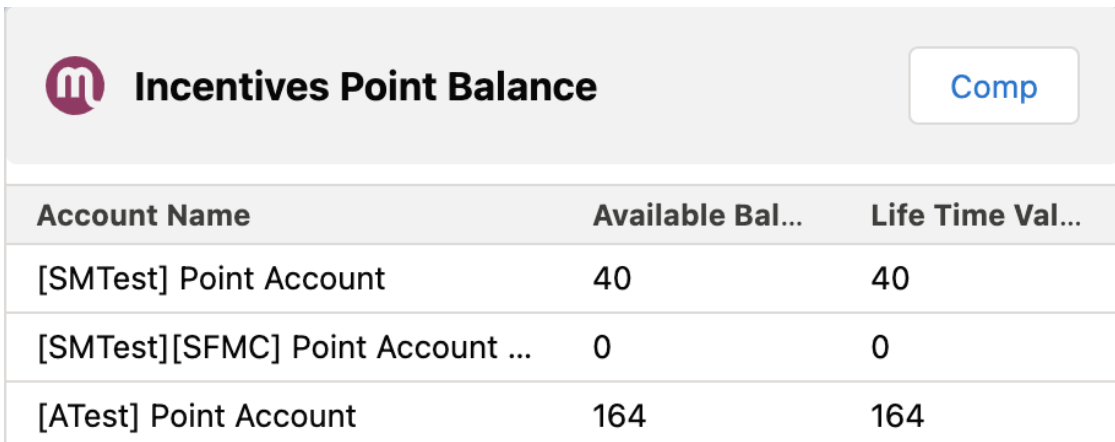
For example, assuming **Search by External ID** is enabled, when Account 1 with external ID ACC\_EXT\_1 and Account 2 with external ID ACC\_EXT\_2 are merged in Salesforce:

- If the survivor's Account external ID is kept during the merge, then the customer with the external ID ACC\_EXT\_1 is the survivor in SessionM
- If the survivor's Account external ID was overwritten with the victim's value ACC\_EXT\_2 during the merge, then the customer with the external ID ACC\_EXT\_2 is the survivor in SessionM, even though it was originally linked to the victim Account in Salesforce.

## Award Loyalty Points to a Customer

Use the SessionM Points component to award loyalty points to a customer. You select the reason for granting the award from a drop-down list specific to your organization.

1. Click **Comp**.



Account Name	Available Bal...	Life Time Val...
[SMTTest] Point Account	40	40
[SMTTest][SFMC] Point Account ...	0	0
[ATest] Point Account	164	164

2. Enter the number of points to award and select the reason for awarding the points from the **Reason** list.



Point Comp

Point Source

Point Account


Reasons

3. Click **Comp** to confirm the award.

## Add a Reference Note to a Customer Record

Use the SessionM Notes component to add notes to a customer profile to record key interactions and other important information that you can refer back to during customer calls.

1. Click **New**.

 **Notes (2)**

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**Reason:** Duplicate User  
September 09, 2021 20:53  
We have this user already, please merge

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**Reason:** Other  
September 09, 2021 20:53  
Lorem ipsum

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2. Record the text for the note in the New Note textbox, select the reason for the note from the **Reason** list, and select **Submit**.

New Note

Reason  
- None -

\* Comment

Cancel Submit

### Limitation

SessionM currently does not record the user ID of the customer representative who creates the note. Instead, all notes have the SFSC generic user as the creator of the note.

## Offer a Loyalty Program to a Customer

Use the SessionM Available Offers component to issue an offer as part of the loyalty program to a customer. You select the offer from a list specific to your organization.

1. Select an offer from the list of available offers for that customer and select **Issue** from the dropdown menu next to it.

**Available Offers (79)**

Search

- \$5 off Check**  
5 Dollars off your next check
- [SMTTest] - 100% Discount**  
[SMTTest] - 100% Discount
- [SMTTest] Catalog dependency**  
Eligible for 1 Catalog item only
- [SMTTest] Item Discount**  
[SMTTest] Item Discount
- [SMTTest][SFMC] a impedit deserunt-acquisition**  
Description amet culpa ut

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2. Click Yes to confirm that you want to make this offer to the customer.

**Confirmation**

Are you sure you want to issue \$10 Off - Offer to this customer?

Yes

## Revoke or Redeem an Offer for a Customer

Use the SessionM Issued Offers to revoke or redeem an offer for a loyalty program previously extended to a customer.

1. Select the offer to revoke from the list of current offers and select **Revoke** from the dropdown menu next to it.

The screenshot shows the 'Issued Offers' section with a search bar and a list of four offers. The third offer, '[SMTTest][SFMC] a impedit deserunt-acquis', has a dropdown menu open showing 'View', 'Revoke', and 'Redeem' options.

Offer Icon	Offer Title	Offer Description	Action
	\$5 off Check	5 Dollars off your next check	▼
	[SMTTest] - 100% Discount	[SMTTest] - 100% Discount	▼
	[SMTTest][SFMC] a impedit deserunt-acquis	Description amet culpa ut	View Revoke Redeem
	[SMTTest] Catalog dependency	Eligible for 1 Catalog item only	

2. Click **Yes** to confirm.






## Extend an Offer for a Customer

You can use the SessionM Expired Offers component to reissue an expired offer. The process is similar to issuing an offer from the Available Offers component.

You can also use the SessionM Issued Offers component to extend the redemption dates of an active user offer.

1. Select the offer to extend from the list of offers and select **Edit Duration** from the dropdown menu next to it.

## Issued Offers (6)

-  Tanya Offers  
For testing ▼
-  Tanya Offers  
For testing
-  Tanya 4 test offer  
Description for Tanya 4 test offer
-  SMTestquaerat tenetur quia  
Description ▼
-  SMTestodio ut et  
Description ▼

- View
- Revoke
- Redeem
- Edit Duration



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2. Edit the dates and click **Yes** to update.



### Extend Offer Validity Date

Change redemption period for offer Tanya Offers:

**Redemption start date**

Date: Jul 20, 2022  Time: 6:24 AM 

**Redemption end date**

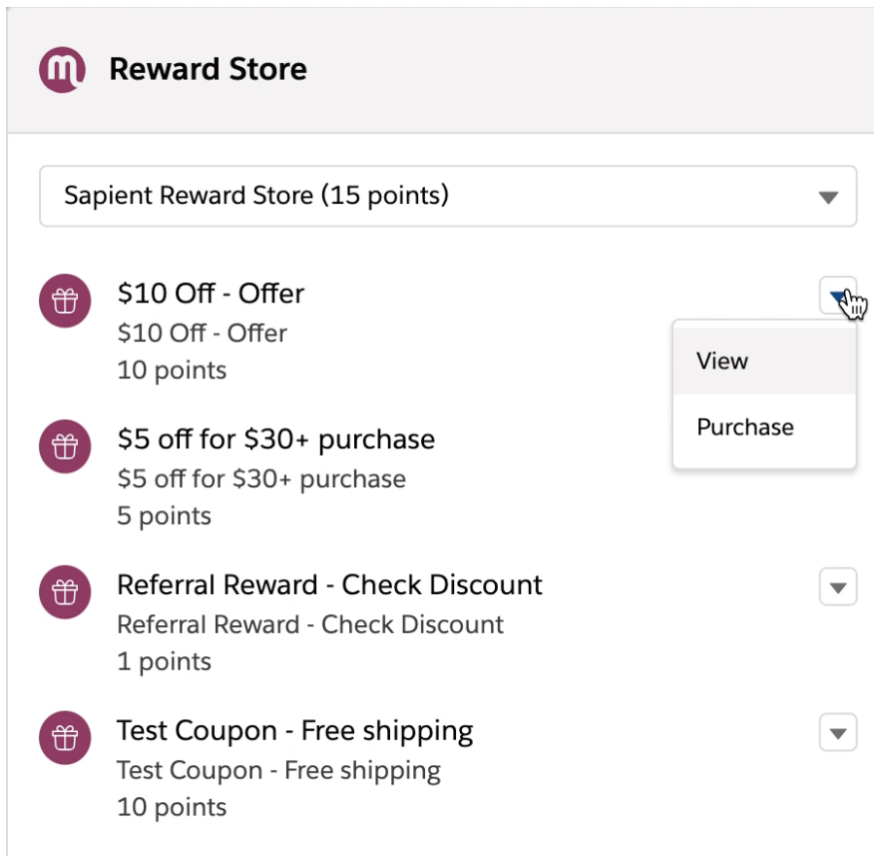
Date: Aug 19, 2022  Time: 6:24 AM 

[Update](#)

## Purchase a Reward for a Customer

Use the SessionM Reward Store component to purchase an offer as part of the loyalty program for a customer. You select the offer from a list specific to your organization and based on the customer's point balance.

1. Select an offer from the list of available offers for that customer and select **Purchase** from the dropdown menu next to it.




2. Click **Yes** to confirm that you want to purchase this reward.

## View Customer Activity with Loyalty Programs

The SessionM Activity Timeline component lists this customer's recent interactions with loyalty programs.

Note that the SFSC administrator can configure the maximum number of records to display on a single page and the total number of records to display. Refer to the Administration Guide for configuration details.

Use the **Previous** and **Next** buttons to scroll through the activity list.

 Activity Timeline (137)

- None -

- INCENTIVES\_POINT\_SPEND** 1/11/2021, 11:52 PM  
<b>TEST INCENTIVES\_POINT\_SPEND -20 Basic Point Source 2021-01-12T07:52:28.6022323Z</b>
- INCENTIVES\_POINT\_SPEND** 1/11/2021, 11:51 PM  
<b>TEST INCENTIVES\_POINT\_SPEND -1000 Basic Point Source 2021-01-12T07:51:07.8170955Z</b>
- INCENTIVES\_POINT\_SPEND** 1/11/2021, 11:50 PM  
<b>TEST INCENTIVES\_POINT\_SPEND -100 Basic Point Source 2021-01-12T07:50:30.2616975Z</b>
- INCENTIVES\_POINT\_SPEND** 1/11/2021, 10:43 PM  
<b>TEST INCENTIVES\_POINT\_SPEND -10 Basic Point Source 2021-01-12T06:43:47.2966944Z</b>
- INCENTIVES\_POINT\_SPEND** 1/11/2021, 10:43 PM  
<b>TEST INCENTIVES\_POINT\_SPEND -10 Basic Point Source 2021-01-12T06:43:17.1154895Z</b>

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