

# SALESFORCE COMMERCE CLOUD USE CASE

# The Life Cycle of a SessionM Offer in Salesforce Commerce Cloud

Abstract

This use case follows the life cycle of a SessionM offer in the Salesforce Commerce Cloud environment. It begins by describing how an offer is created and issued to a customer in the SessionM platform. It then shows how that customer would redeem the offer at SFCC rewards store. The use case then descibes how an admin can view that purchase in SFCC and push it to the SessionM platform.

February 2019



## Contents

Working with SessionM Offers in SFCC	. 3
SessionM Offer Life Cycle	3
Life Cycle Walkthrough	4
Create Offer in SessionM Offers Module	4
Issue Offer to Customer	6
Customer Redeems Offer at SFCC Reward Store	7
Propagating the Transaction from SFFCC to SessionM	7
Viewing the Updated Customer Data in SessionM	9



# Working with SessionM Offers in SFCC

The Salesforce Commerce Cloud (SFCC) is an online retail platform powering storefront, cart, and checkout management with customizable business logic for mid- to enterprise-level brands across vertical markets.

The integration of the SessionM Platform with SFCC adds the benefits of the SMP to the ecommerce experience presented by Salesforce through a number of data connections, enabling campaigns, turnkey loyalty, and offer redemption solutions.

### SessionM Offer Life Cycle

This use case follows the life cycle of a SessionM offer in the SFCC environment. It begins by describing how an offer is created and issued to a customer in the SessionM platform. It then shows how that customer would redeem the offer at SFCC rewards store. Next, it then describes how an SFCC admin can propagate the updated customer data from this transaction to SessionM. Finally, it describes how to view the updated customer information in the SessionM platform.

The following image shows the life cycle of a SessionM offer in an SFCC environment.





## Life Cycle Walkthrough

The following procedure describes the steps to create an audience, issue an offer and synchronize the offer data via the SessionM SFMC Connector. Once the data is available in SFMC, a marketer can notify customers that an offer is available by including the relevant details in their channel of choice.

#### Create Offer in SessionM Offers Module

Begin the workflow by creating the offer that will be presented to your customers.

1. Navigate to SessionM Offer Management Module.



2. Click the **Add Offer** button.



3. Enter the title and description. Then select the **Offer Type**.



Add Offer	36
Title	
10% OFF TOTAL - TEST_SF_OFFER	
Maximum 100 Characters.	
Description	
10% OFF TOTAL - TEST_SF_OFFER	
Maximum 1000 Characters.	
Offer Type	
Percent Check Discount	A V
	Cancel Create Offer

4. Complete setting up the offer by specifying the Discount Config, Issuance Restrictions and Redemption Restrictions.

Setup	Creative	Publish	
Discoun	t Config	Issuance Restrictions	Redemption Restrictions
Percent	Check Di	scount	
Percent Che	eck Discount (	%)	
10			
Specify a disc	ount percentage	between 0.00 and 100.00. For a	example, "20" would give a customer 20
Offer Title Internal (nor Title 10% OFF	e -customer-fac TOTAL - TEST	ing) name for the offer, disp	played in the offers overview.

5. On the Publish page, click the **Publish** button to activate the offer.



Creative Details	
Culture: en	
Title 10% OFF TOTAL - TEST_SF_OFFER	
Description 10% OFF TOTAL - TEST_SF_OFFER	
Terms and Conditions None	
Graphic None	
	0 se Publish

#### Issue Offer to Customer

Next, issue the offer created above to a customer.

1. Navigate to the page for the user in the SessionM Customers module. Then select the **Offers** tab followed by the **Available** tab. A list of available offer displays, including the offer you created in the procedure above.

Activity	Profile	Campaigns	Offers tes	Data Privacy			
Issued	Redeemed	Expired	Available				
					Search Offers by Name		Q
N	ame 🌲	Offer Type	Total Issued	Total Redeemed	Offer Start Date 🌲	Offer End Date 🌲	
\$1 PC	00 Off Windows	Fixed Amount Iter Discount	m 1	0	02/09/2019 07:00 pm	02/14/2020 07:00 pm	

- 2. Click the **button** at the end of the row for that offer and select **Issue**. SessionM issues the offer to this customer.
- 3. Select the **Issued** tab to confirm that the offer has been issued.

	Activity	Profile	Campaigns	Offers	Notes	Data Priva	су			
(	lssued	Redeemed	Expired	Available						
	Nam	le	Pa	arent	Offer Typ	e	Acquired Date	Redemption Start Date	Redemption End Date	
	\$10	0 Off Windows	PC –		Fixed Amo	ount	02/22/2019 03:58	02/22/2019 03:58	03/24/2019 04:58	
	V	/iew Details			Check Dis	count	pm	pm	pm	



#### Customer Redeems Offer at SFCC Reward Store

Let's recap. Using the SessionM platform, we've created an offer and issued that offer to a specific customer. Now let's take a look at how that customer redeems the offer at a SFCC-powered reward store.

- 1. The customer navigates to the reward store and enters her credentials.
- 2. The customer selects an item for purchase, adds it to her cart and proceeds to checkout.
- 3. The customer fills in her user information and select a shipping method. At this point, she is redirected to a page that list all of her available offers.
- 4. In the Offer Wallet section, the customer selects a relevant offer from the list of eligible offers and clicks **Apply**.

	See Flivacy Fullcy			
ENTER GIFT CERTIFICATE	OR COUPON CODES			
	Enter coupon code	Apply	Help	
	Redeem Gift Certificate			
		Apply	Check Balance	Help
OFFER WALLET				
	Your Offers Eligible			•
5\$ off Check	K		Apply	
			1	

5. The customer then completes the purchase, with any applicable discounts applied by the reward store. She receives both a text confirmation about her purchase and is sent an email for the same.

#### Propagating the Transaction from SFFCC to SessionM

With the transaction complete, you run a job from the SFCC Administration tab that forwards the updated data about the customer purchase and offer redemption to SessionM.



1. Login to SFCC and select the Administration tab.



#### 2. Select Jobs.

Administration feature I	ookup			Q	
Provide the second state of the sec	Content Libraries Batch Processes Embedded CDN Settings	Site Development           Development Setup           Code Deployment           System Object Types           Custom Croro Pages           Custom Maintenance Pages           Deprecated API Usage           Import & Export           Site Import & Export           Open Commerce API Settings           Customer Service Center Settings	Global Preferences Locales Instance Time Zone Change History OAuth2 Providers Security Store Locator Data Feature Switches Order Search Sequence Numbers Products Retention Settings Import & Export Global Timeouts Custom Preferences Einstein Data Privacy Agreement Analytics	II Operations Iobs Iob History Iobs (Deprecated) Iob History (Deprecated) Iob Statistics Import & Export GMV Reports Custom Log Settings Code Profiler Quota Status Change History Encryption Keys Private Keys and Certificates Services Service Status IP Address Geolocation Data Einstein Deployment Dashboard	! your homepa

3. Click on the SM-OrdersExportHTTPS job.

	_				
SM-OrdersExportHTTPS	ОК	2/21/2019 4:13 am	SiteGenesis	0	÷

4. Click **Run Now** to run the job.

Administration / Operations / Jobs /	
SM-OrdersExportHTTPS	Run Now
Generat Schedule and History Resources Job Steps Failure Handling Notification	
ID*	
SM-OrdersExportHTTPS	
Description	
Export orders to SessionM's through HTTPS service	
Priority	
Normal      High	



#### Viewing the Updated Customer Data in SessionM

To complete the life cycle for this offer and redemption, let's take a look at the updated customer data in SessionM.

- 1. Navigate to the page for the customer in the SessionM Customers module and select the **Activity** tab.
- 2. On the Activity Log tab, select Offer Claimed from the "filter by event type" list.



The updated transaction data displays.