



SALESFORCE DMP USE CASE

SFDMP Connector – Creating, Exporting and Importing a SessionM Audience

Abstract

This use case demonstrates how to use the SessionM Audience Module to segment users into an audience and export a CSV file containing the audience data to an SFTP site. It then describes how to use the DMP 1st Party Data import feature to import the audience data into Salesforce Data Management Platform (SFDMP), where it is used to enhance ad targeting.

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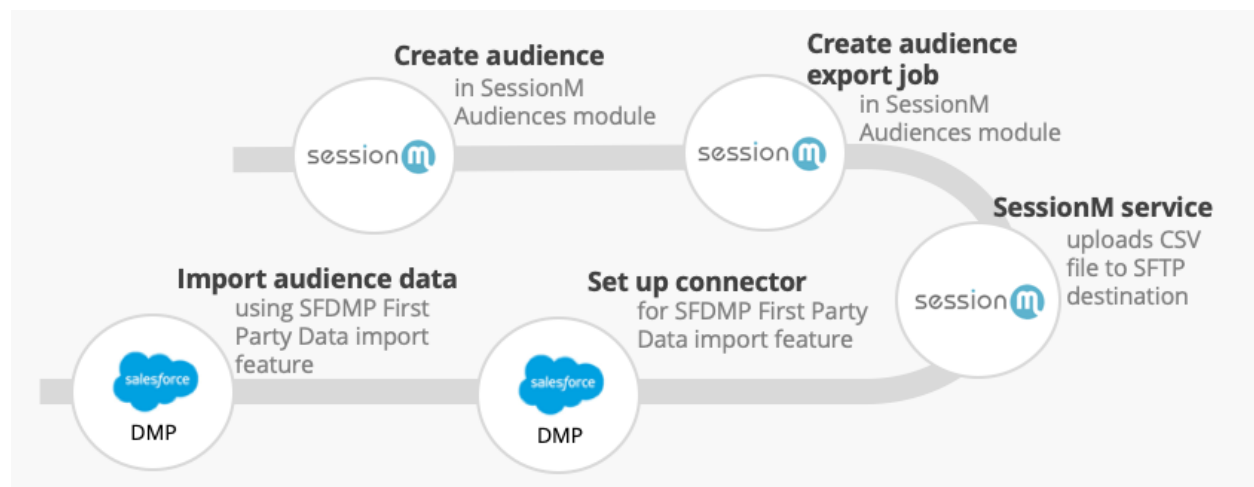
SFDMP – Creating, Exporting and Importing a SessionM Audience

This use case demonstrates how to:

- use the SessionM Audience Module to segment users into an audience.
- export a CSV file containing audience data to a configured SFTP destination.
- set up a DMP connector.
- use the DMP 1st Party Data import feature to import the audience data into SFDMP.

Use Case Workflow

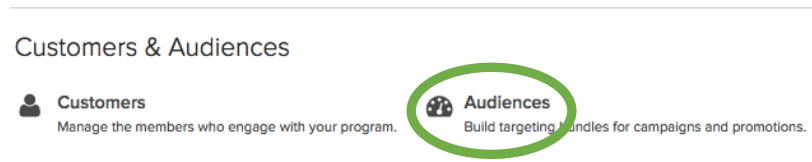
The following image shows the workflow for creating and exporting a SessionM audience and then importing it into SFDMP.



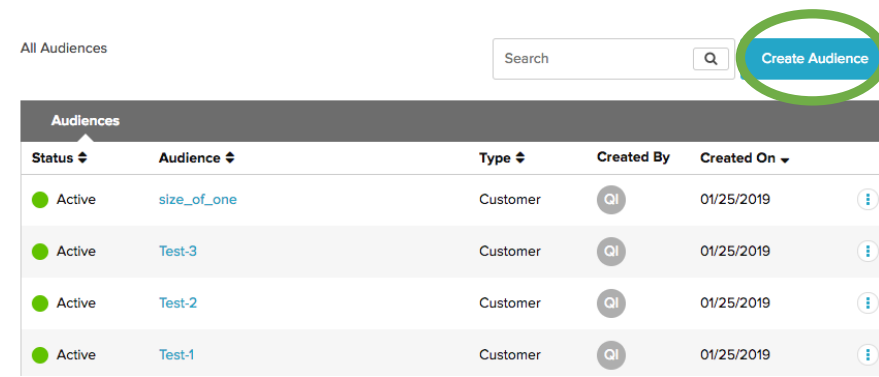
Create Audience in the SessionM Audience Module

Define the audience whose data you will export to SFDMP.

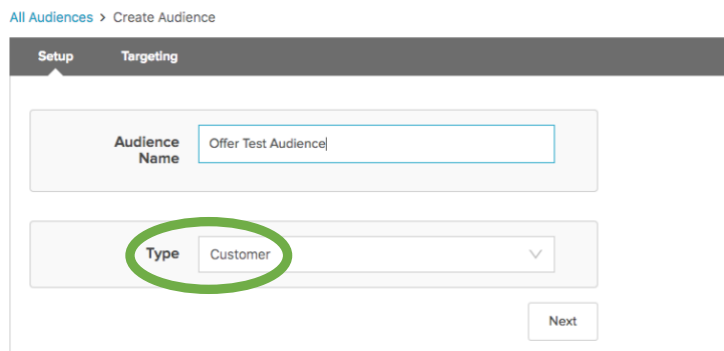
1. Navigate to Audiences Module on the SessionM dashboard.



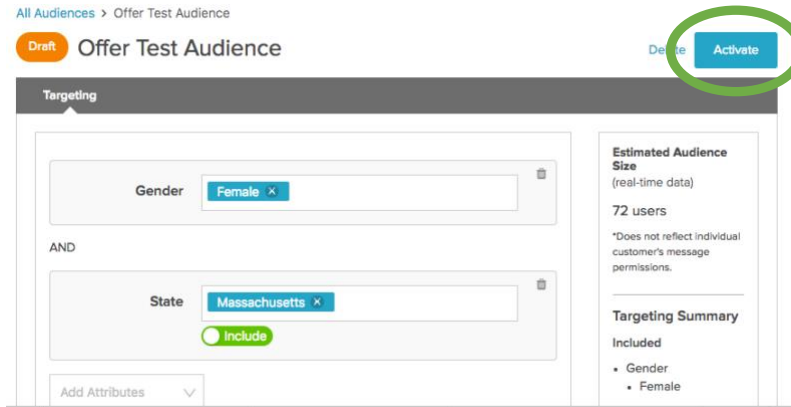
2. Click **Create Audience**.



3. On the Audience Setup tab, enter the Audience Name and select **Customer** as the Type.



4. Specify audience criteria to filter the audience. In the example below, two criteria are specified: Gender is "Female" and State is "Massachusetts".

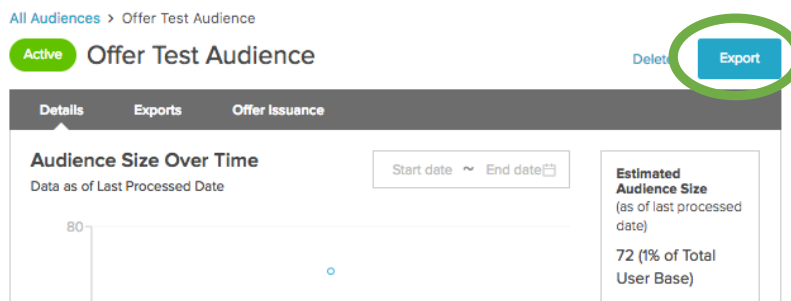


5. Click **Save** and then **Activate**.

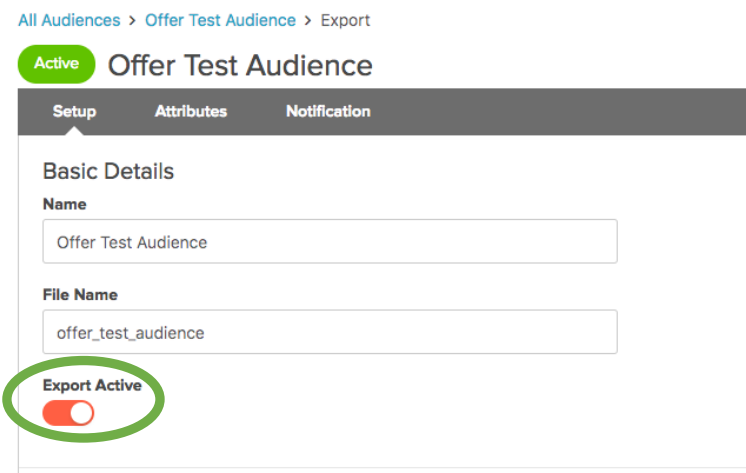
Configure Audience Export in SessionM Audience Module

Set up an audience export in the SessionM Audience Module.

1. In the Audience Module, select the audience that you defined in the previous step and click **Export**.



2. Supply the basic details for the export and toggle **Export Active** on.



- Set up a delivery schedule for the export. In the example below, the audience is generated once a day.

Delivery Schedule

Delivery Date/Time

Repeat This Export

Repeats every day(s)

Ends occurrences

Cancel Export
 If the export has not completed, when should we stop trying to export the audience?

After

- Set the file destination settings.

Destination Settings

Format

Destination

Encryption (optional)

- On Attributes page, select **Include Header Row**. Leave the default value for Record Delimiter. Set Field Delimiter to **Other** and use a pipe (|) as the delimiter value.

Configuration Settings

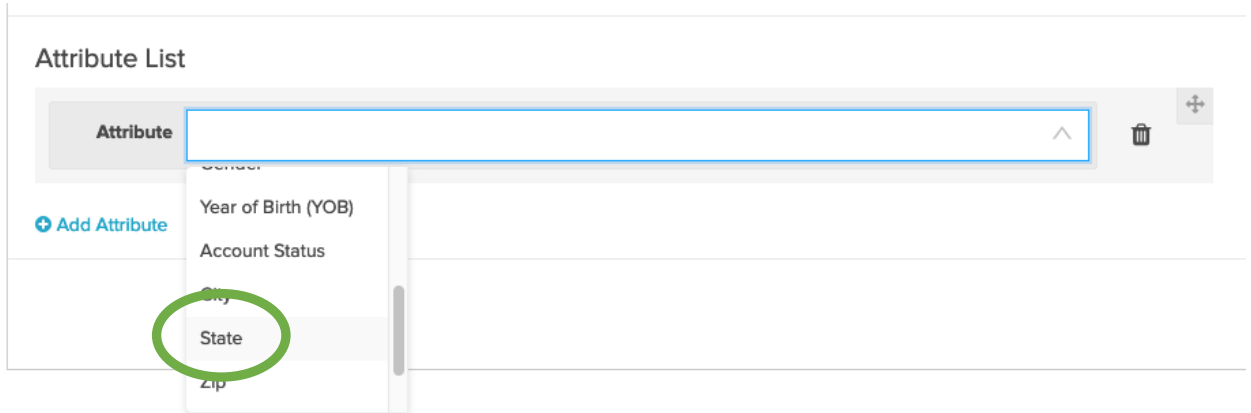
Include Header Row

Record Delimiter

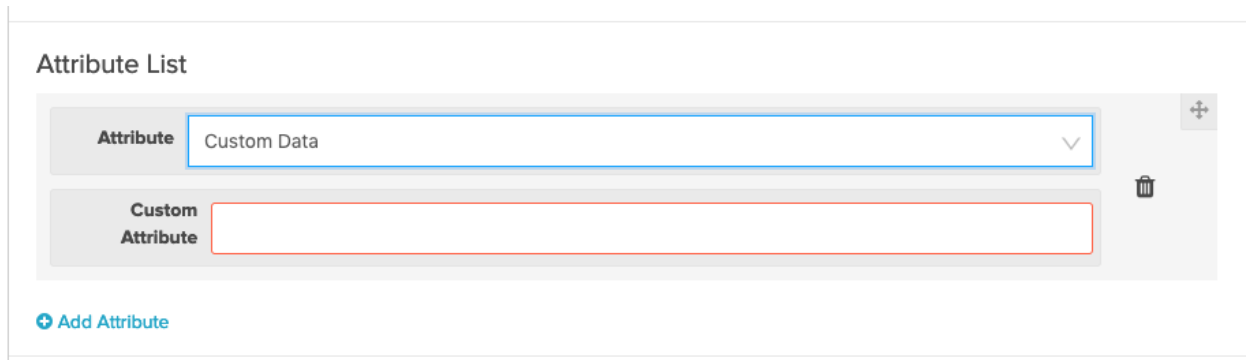
Field Delimiter

Delimiter value (single character)

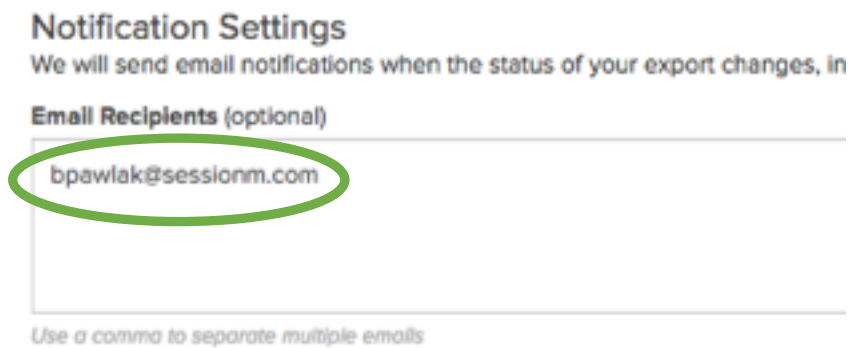
- To specify a standard attribute in an audience export, select that attribute from the Attributes dropdown list on the Attributes page.



- To specify a custom attribute in an audience export, first select the Custom Data attribute from the Attributes dropdown list on the Attributes page of the audience builder. A Custom Attribute textbox appears.



- (Optional) Specify one or more email addresses that should be notified when the status of the audience export job changes.



9. Click **Exports** to see the status of the export job.

All Audiences > Offer Test Audience

Active Offer Test Audience

Details Exports Offer Issuance

Configuration History

Name	Cadence	Repeats	Ends	Format	Destinat
Offer Test Audience	One Time	Never	01/29/19 10:57	CSV	TEST

10. Click **History** to view the status of audience export job.

All Audiences > Offer Test Audience

Active Offer Test Audience

Details Exports Offer Issuance

Configuration History

State	Name	Cadence	Start Date	End Date	Format	Destinat
In-Progress	Offer Test Audience	One Time	01/28/19 12:31:05	—	CSV	TEST

Audience Data Exported to SFTP

The SessionM Audience Export Service generates a CSV file and transfers it to a configured SFTP site.

Set Up SFDMP Connector

You must set up a new connector in SFDMP before importing data from SessionM to SFDMP. Use the following link to access the connector set up instructions:

<https://konsole.zendesk.com/hc/en-us/articles/360017744053-Self-Serve-First-Party-Imports>

Use the following settings for SessionM User Import.

- Step 2 – Connector Name “SessionM User Data”
- Step 3 – Data Type = User
- Step 4 – Identifier Type = Hashed Email (SessionM to DMP integration uses SHA256 Hashed Email for matching records.)
- Step 5 – Data Refresh Handling should be set to “Overwrite”
- Step 6 – File Location should map to where SessionM files are being loaded
- Step 7 – File Compression Type – choose if applicable
- Step 8 – File Type = CSV

- Step 9 – “|” pipe delimiter is recommended
- Step 10 – Include a row in the import definition for each SessionM attribute in your SessionM Audience export format. **Note:** This columns and rows must be in matching order.

Import Audience Data into DMP

Log into SFMP and import the file using the following procedure:

<https://konsole.zendesk.com/hc/en-us/articles/214918988-First-Party-Data-Import>