



SALESFORCE MARKETING CLOUD USE CASE

SFMC Connector – Creating and Exporting/Importing a SessionM Audience

Abstract

This use case demonstrates how to use the SessionM Audience Module to segment users and export/import a CSV file containing audience data to Salesforce Marketing Cloud (SFMC) to deliver personalized content and communications.

February 2019

Contents

SFMC Connector – Creating and Exporting/Importing a SessionM Audience.....	3
Audience Data Extension.....	3
Use Case Workflow	4
Use Case Walkthrough.....	4
Create Audience in the SessionM Audience Module.....	4
Configure Audience Export in SessionM Audience Module	6
Audience Data Exported to SFTP.....	9
SFMC Automation Studio Job – Import Audience Data	9

SFMC Connector – Creating and Exporting/Importing a SessionM Audience

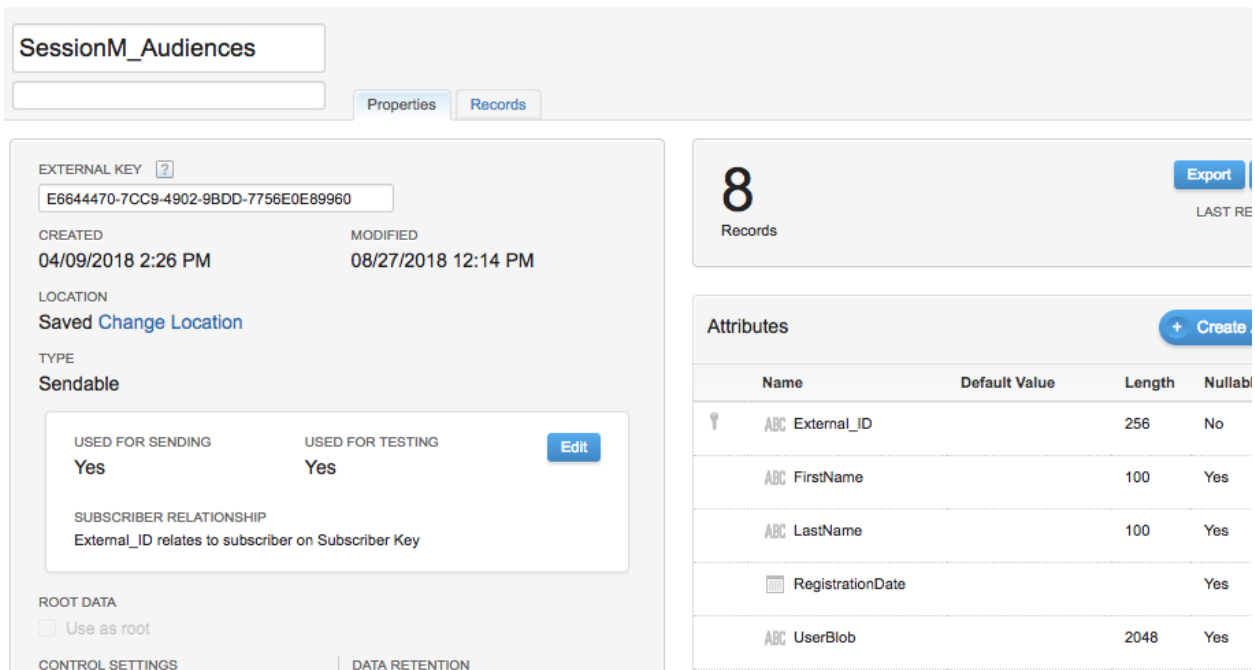
This use case demonstrates how to use the SessionM Audience Module to segment users and export/import a CSV file containing audience data to Salesforce Marketing Cloud (SFMC) to deliver personalized content and communications.

Audience Data Extension

A unique SFMC Data Extension (DE) is required for each audience exported from SessionM.

An SFMC administrator should create a new DE prior to exporting your SessionM audience. The structure of this DE should match the exact Field Names and Data types of the Audience Export file that you create in SessionM. This enables you to import using a job in SFMC Automation Studio.

The following image shows a sample SessionM_Audience data extension.



SessionM_Audiences

Properties Records

EXTERNAL KEY [?]
E6644470-7CC9-4902-9BDD-7756E0E89960

CREATED 04/09/2018 2:26 PM MODIFIED 08/27/2018 12:14 PM

LOCATION
Saved Change Location

TYPE
Sendable

USED FOR SENDING: Yes USED FOR TESTING: Yes [Edit](#)

SUBSCRIBER RELATIONSHIP
External_ID relates to subscriber on Subscriber Key

ROOT DATA
 Use as root

CONTROL SETTINGS DATA RETENTION

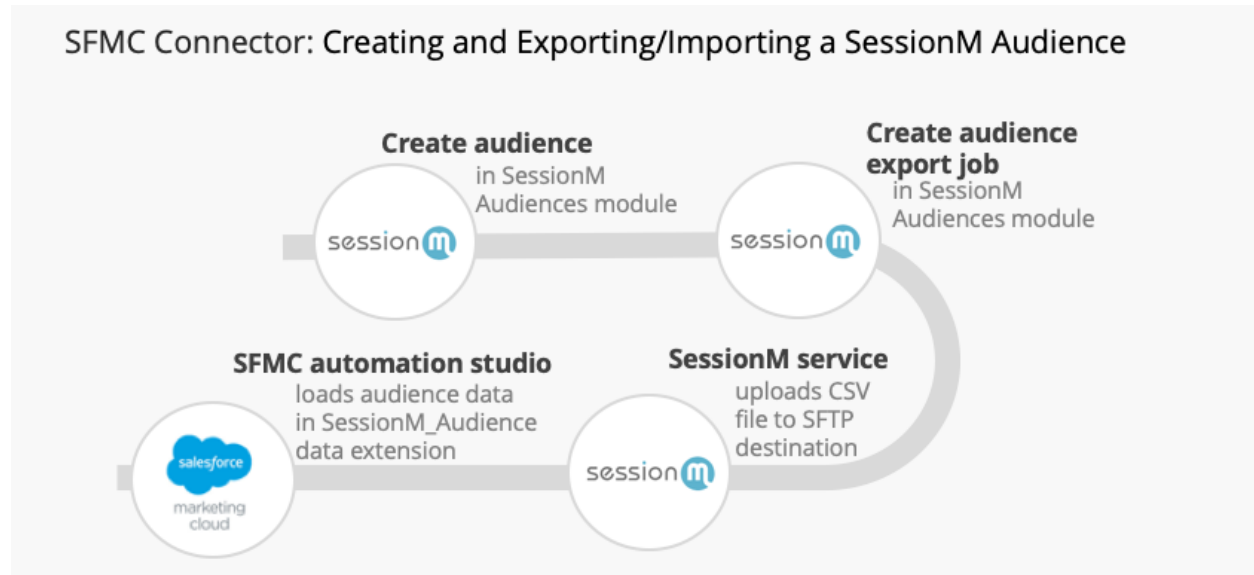
8 Records [Export](#) LAST RE

Attributes [+ Create](#)

Name	Default Value	Length	Nullabl
ABC External_ID		256	No
ABC FirstName		100	Yes
ABC LastName		100	Yes
RegistrationDate			Yes
ABC UserBlob		2048	Yes

Use Case Workflow

The following image shows the workflow for creating and exporting a SessionM audience to SFMC.



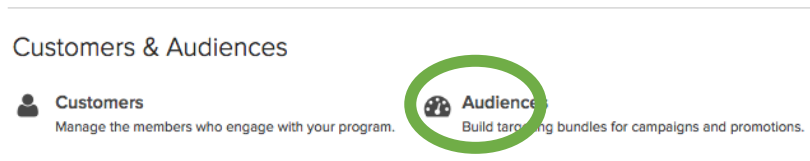
Use Case Walkthrough

The following procedure describes the steps to create an audience, create an audience export, and import the audience data using SFMC Automation Studio. Once the data is available in SFMC, a marketer can leverage the audience in a journey or scheduled message.

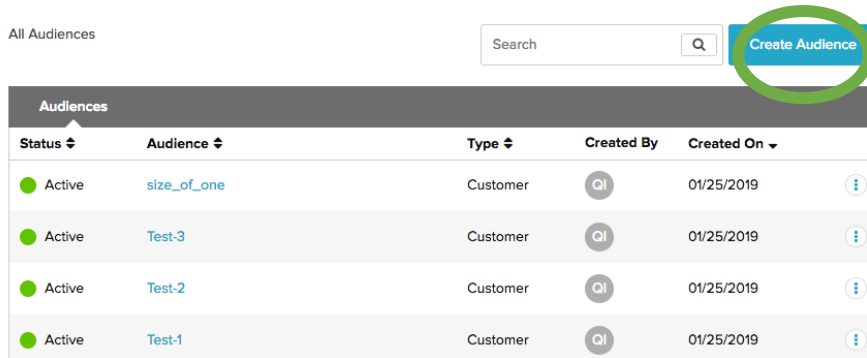
Create Audience in the SessionM Audience Module

Define the audience whose data you will export to SFMC.

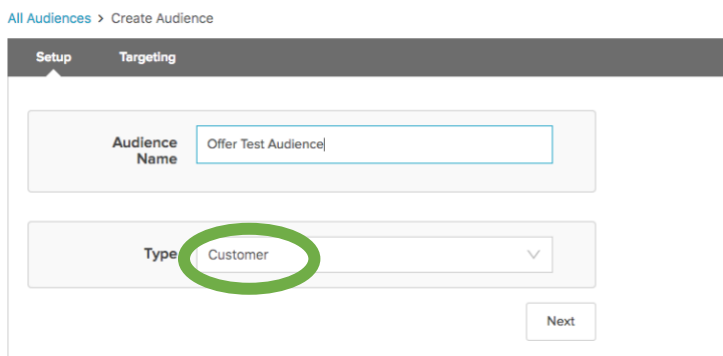
1. Navigate to Audiences Module on the SessionM dashboard.



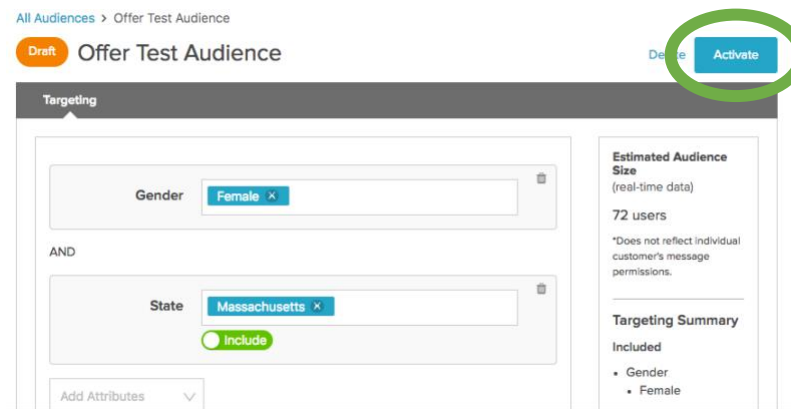
- Click the **Create Audience** button.



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



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

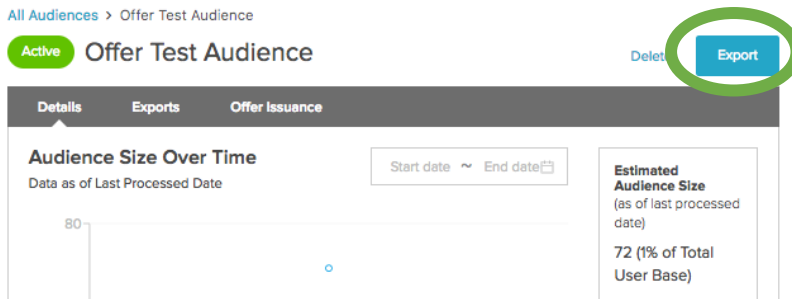


- Click **Save** and then **Activate**.

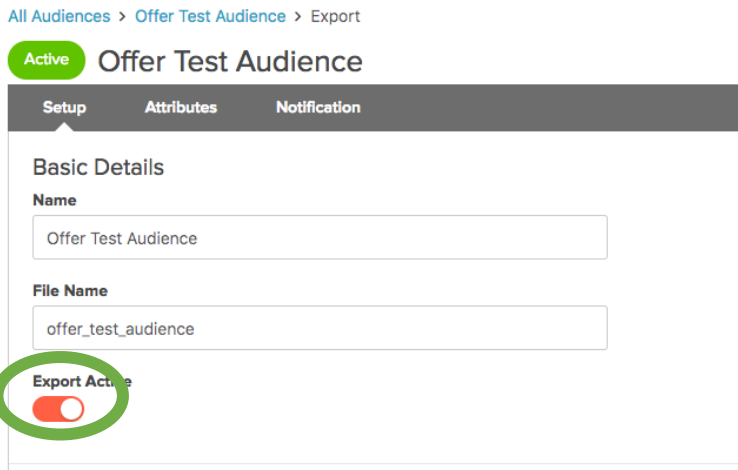
Configure Audience Export in SessionM Audience Module

Set up an audience export in the SessionM Audience Module.

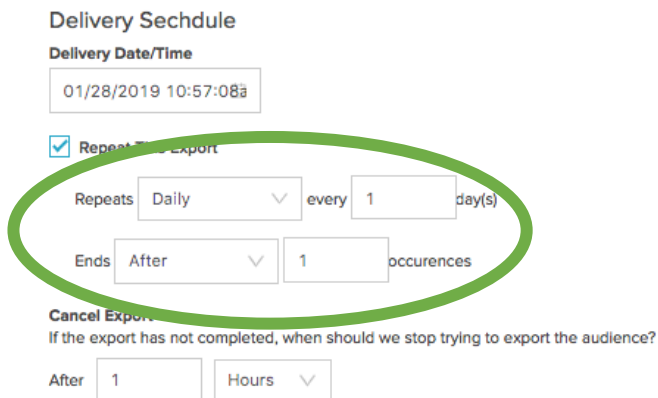
1. In the Audience Module, select the audience that you defined in the previous step and click **Export**.



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



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



- 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.

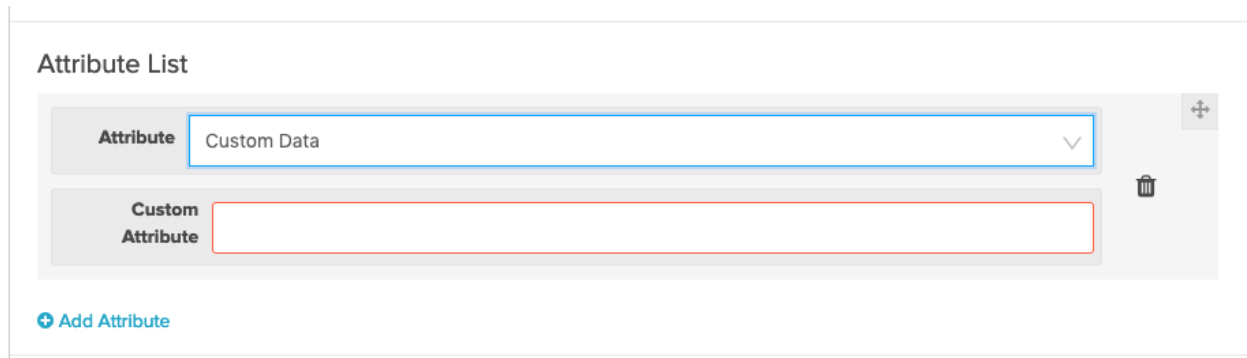
Attribute List

Attribute

[+ Add Attribute](#)

- Year of Birth (YOB)
- Account Status
- City**
- State
- Zip

- 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.



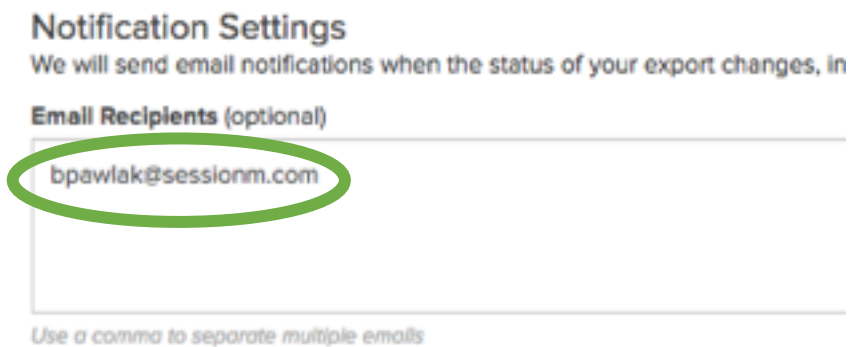
Attribute List

Attribute: Custom Data

Custom Attribute:

+ Add Attribute

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



Notification Settings

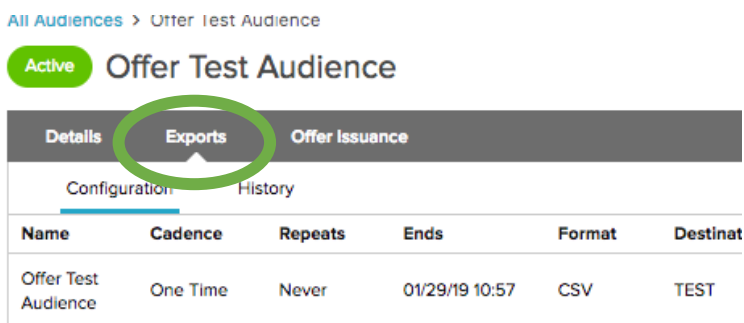
We will send email notifications when the status of your export changes, in

Email Recipients (optional)

bpawlak@sessionm.com

Use a comma to separate multiple emails

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



All Audiences > Offer Test Audience

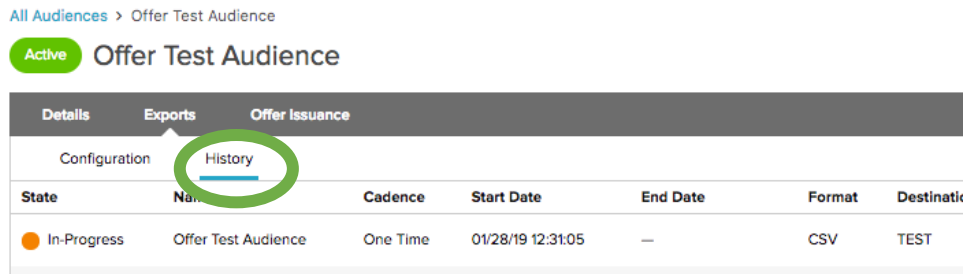
Active Offer Test Audience

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.



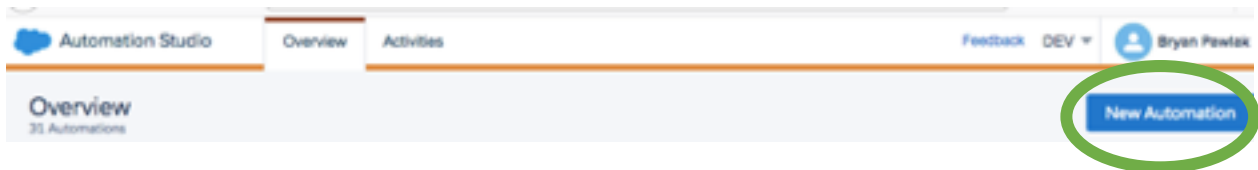
Audience Data Exported to SFTP

SessionM Audience Export Service then generates a CSV file and transfers the file to a configured SFTP.

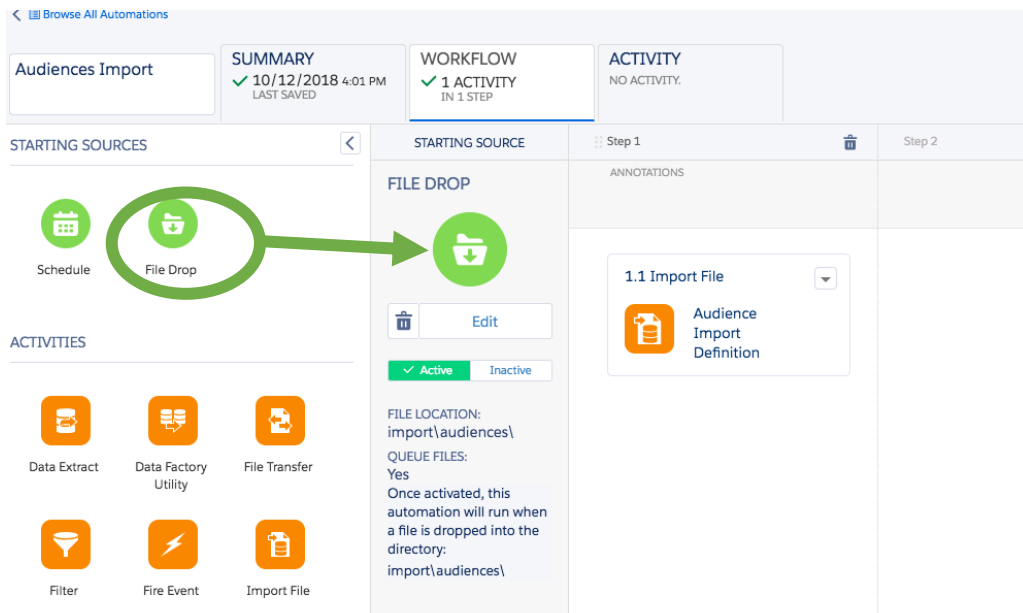
SFMC Automation Studio Job – Import Audience Data

In SFMC, navigate to the Automation Studio and set up and configure the import.

1. Click the **New Automation** button.



2. Under Starting Sources, click and drag **File Drop** onto the canvas.



3. Click **Edit** on the File Drop. Choose the folder where the Offers CSV files are exported. SessionM recommends that files be organized based on file contents.

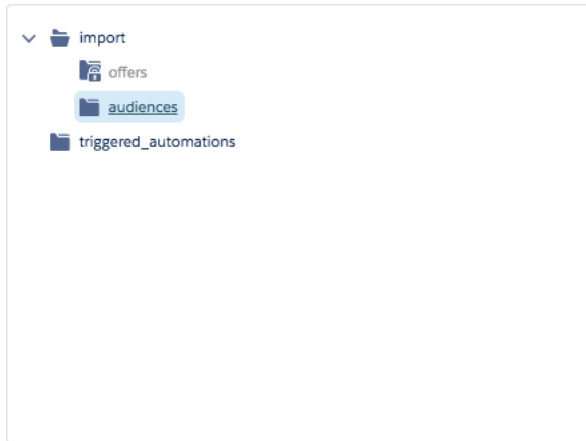
In this example we have configured export of audience file to an "audiences" folder in SFTP.

File Drop Setup

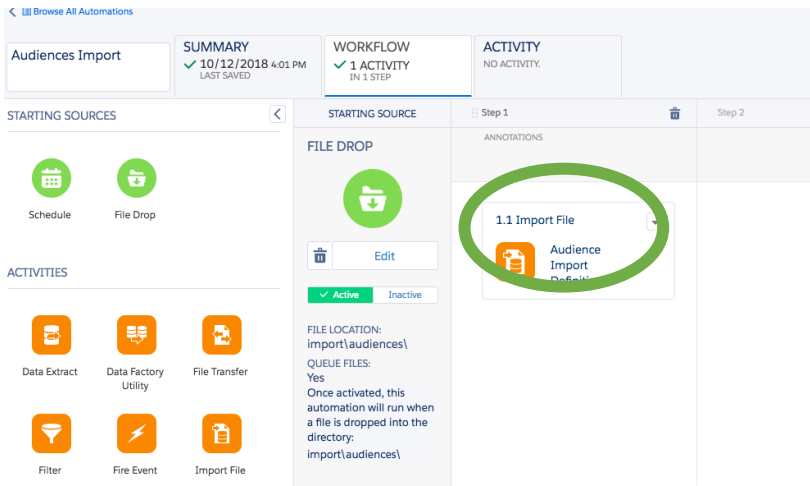
Choose Directory

Select a directory. When a file is dropped into this directory, the automation begins. Select Use filename pattern if the automation will be triggered by filename.

- No Filename Pattern ⓘ
- Use Filename Pattern ⓘ



4. Click on **Import File Definition** to set up the import definition workflow.



Audiences Import | SUMMARY: 10/12/2018 4:01 PM LAST SAVED | WORKFLOW: 1 ACTIVITY IN 1 STEP | ACTIVITY: NO ACTIVITY

STARTING SOURCES: Schedule, File Drop

ACTIVITIES: Data Extract, Data Factory Utility, File Transfer, Filter, Fire Event, Import File

FILE DROP (Active)

FILE LOCATION: import\audiences\
 QUEUE FILES: Yes
 Once activated, this automation will run when a file is dropped into the directory: import\audiences\
 FILE LOCATION: import\audiences\
 QUEUE FILES: Yes

1.1 Import File (Audience Import Definition)

5. Add a Name and Description. Click **Next** to continue.

Edit Import Definition

● ACTIVITY INFO
 ● IMPORT FILE
 ● DESTINATION
 ● MAPPING
 ● REVIEW

Name:

Description:

External Key:

Send notification email to:

An email is sent when an import completes.

6. Choose the file location and naming pattern, then click **Next**.

File Location*

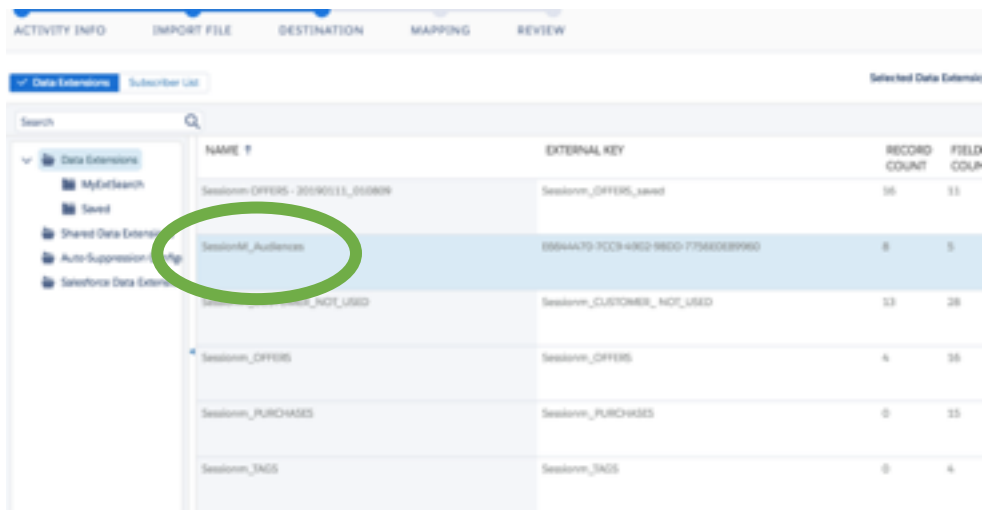
This is a current view of your chosen file location:

- ▼ 📁 import
 - ▼ 📁 audiences
 - Audiences-10-12-2018.csv

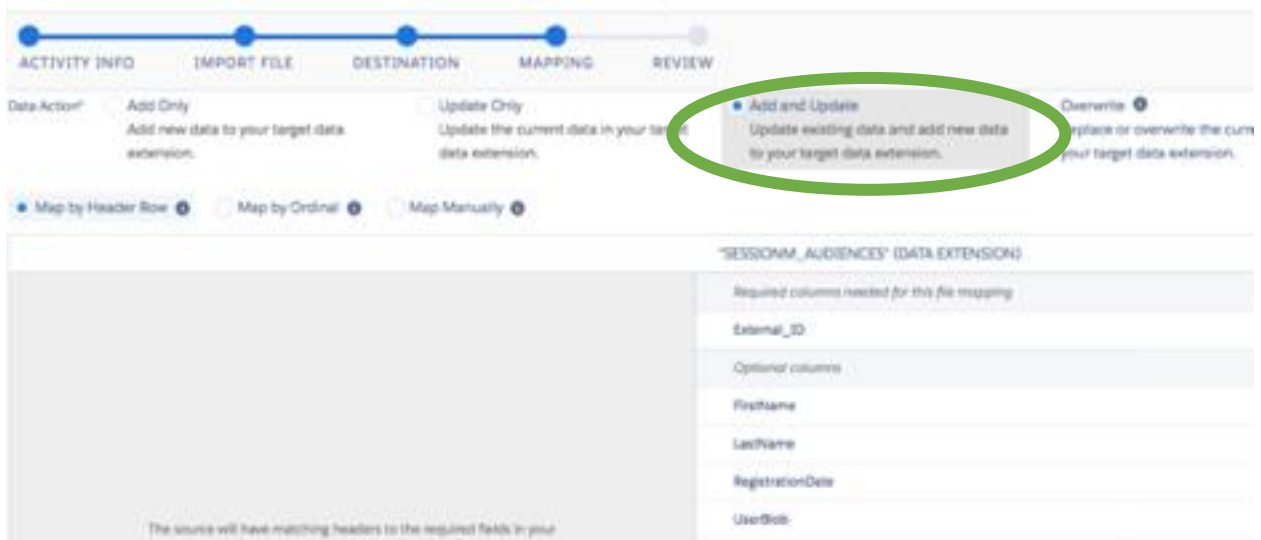
File Naming Pattern*

Example File Name: %%FILENAME_FROM_TRIGGER%%

- Choose the Data Extension in which to load data. In this example, you are loading data into "SessionM_Audiences". Click **Next**.



- Choose the Data Action that indicates how data should be loaded. In this example, choose **Add and Update** data. Then be sure to map the columns from the CSV file to the DE fields. Click **Next**.



9. On the **Review** screen, review your settings and click **Finish** when complete.

SOURCE	"SESSIONM_AUDIENCES" (DATA EXTENSION)	DATA TYPE
[Matching Header]	External_ID	Text
[Matching Header]	FirstName	Text
[Matching Header]	LastName	Text

10. Back on the Workflow tab, **Save** and then **Activate** your automation.

11. Once active, your automation picks up any new audience files and loads it to the data extension.

SessionM_Audiences

Properties Records

External_ID Search Import Export Edit Record Clear Record

<input type="checkbox"/>	External_ID	FirstName	LastName	RegistrationDate	UserBlob
<input type="checkbox"/>	623 4567	Srinivas	Pothireddy	5/2/2017 12:00:00 AM	{"custom":{},"standard":{"account_status":"good","address":"","01","email":"ext_srin_email_1@sessionm.com","external_id":"2e04-11e8-83c0-c52a7284163e","identifiers":null,"last_name":{"phone_number":"8574004032","phone_type":"home","preference":{"primary","verified_ownership":false},"state":"MA","zip":"022
<input type="checkbox"/>	r32 2g	John	Smith		
<input type="checkbox"/>	123345	John	Smith		{"opted_in": true, "IsRegistered": "Y"}
<input type="checkbox"/>	hello0	John	Smith		{"opted_in": true, "IsRegistered": "Y"}
<input type="checkbox"/>	hello1	John	Smith		{"opted_in": true, "IsRegistered": "Y"}
<input type="checkbox"/>	hello2	John	Smith		{"opted_in": true, "IsRegistered": "Y"}
<input type="checkbox"/>	hello3	John	Smith		{"opted_in": true, "IsRegistered": "Y"}
<input type="checkbox"/>	hello4	John	Smith		{"opted_in": true, "IsRegistered": "Y"}