



SALESFORCE MARKETING CLOUD USE CASE

SFMC Connector – Issuing an Offer to a SessionM Audience

Abstract

This use case demonstrates how you can leverage offers in the SessionM Offers Module with Salesforce Marketing Cloud (SFMC) to deliver personalized content in messaging channels.

February 2019

Contents

- SFMC Connector – Issuing an Offer to a SessionM Audience..... 3**
- SessionM_Offers Data Extension 3
- Use Case Workflow 4
- Use Case Walkthrough..... 4
- Create Offer in SessionM Offers Module 4
- Create Audience in the SessionM Audience Module..... 6
- Configure Audience Export in SessionM Audience Module 7
- Issue Offer to Audience..... 10
- Audience Data Exported to SFTP..... 11
- SFMC Automation Studio Job – Import Audience Data 12

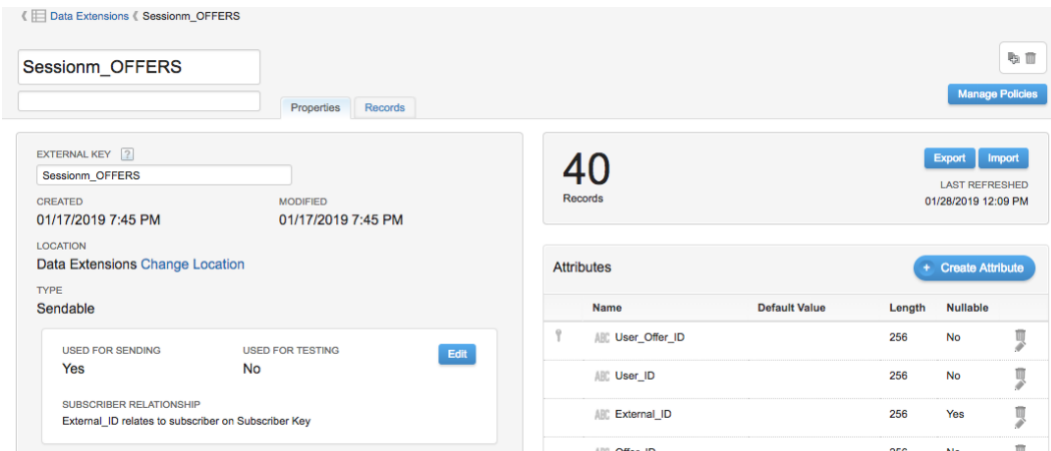
SFMC Connector – Issuing an Offer to a SessionM Audience

This use case demonstrates how you can leverage offers in the SessionM Offers Module with Salesforce Marketing Cloud (SFMC) to deliver personalized content in messaging channels. The association between SessionM and SFMC is created through the SessionM_Offers data extension.

SessionM_Offers Data Extension

The SessionM/SFMC integration provides SFMC users with the ability to trigger SFMC journeys based on the status of SessionM offers stored in the SessionM_Offers data extension. The SessionM_Offers data extension is a database table that resides in SFMC and is updated with offer data by SessionM.

The SessionM_Offers data extension is shown below.



The screenshot displays the configuration for the 'Sessionm_OFFERS' data extension in Salesforce Marketing Cloud. The interface includes a search bar, tabs for 'Properties' and 'Records', and a 'Manage Policies' button. The main configuration area shows the following details:

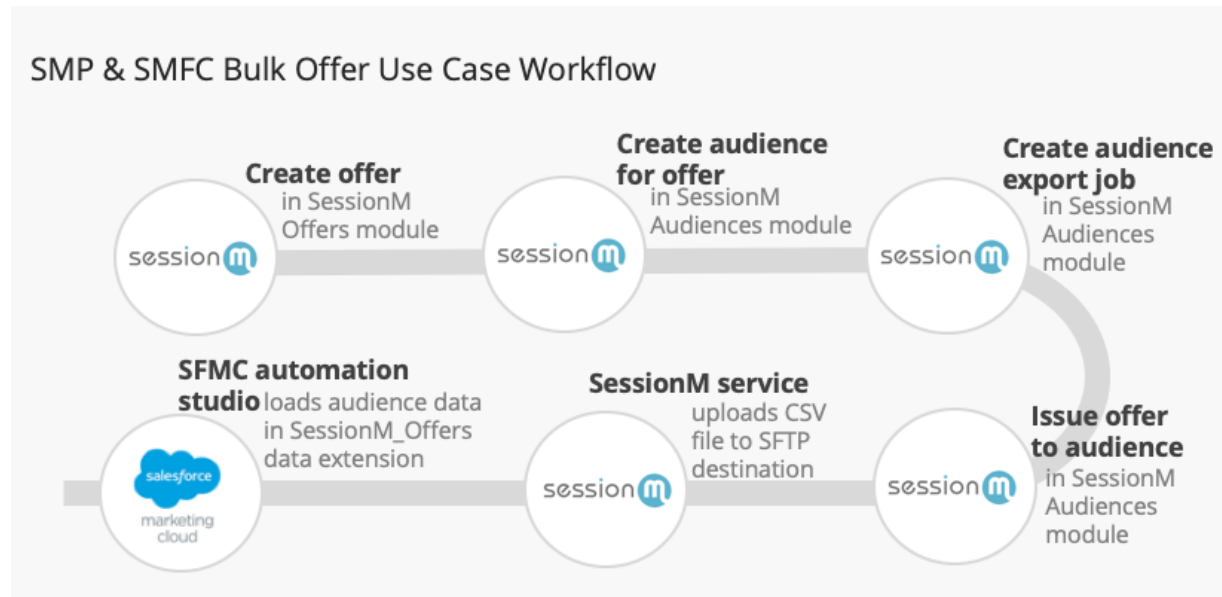
- EXTERNAL KEY:** Sessionm_OFFERS
- CREATED:** 01/17/2019 7:45 PM
- MODIFIED:** 01/17/2019 7:45 PM
- LOCATION:** Data Extensions Change Location
- TYPE:** Sendable
- USED FOR SENDING:** Yes
- USED FOR TESTING:** No
- SUBSCRIBER RELATIONSHIP:** External_ID relates to subscriber on Subscriber Key

Summary statistics show 40 records, with an 'Export' and 'Import' button, and a 'LAST REFRESHED' timestamp of 01/28/2019 12:09 PM. An 'Attributes' table lists the following fields:

Name	Default Value	Length	Nullable
ABC User_Offer_ID		256	No
ABC User_ID		256	No
ABC External_ID		256	Yes
ABC Offer_ID		256	No

Use Case Workflow

The following image shows the workflow for issuing an offer to a SessionM audience.



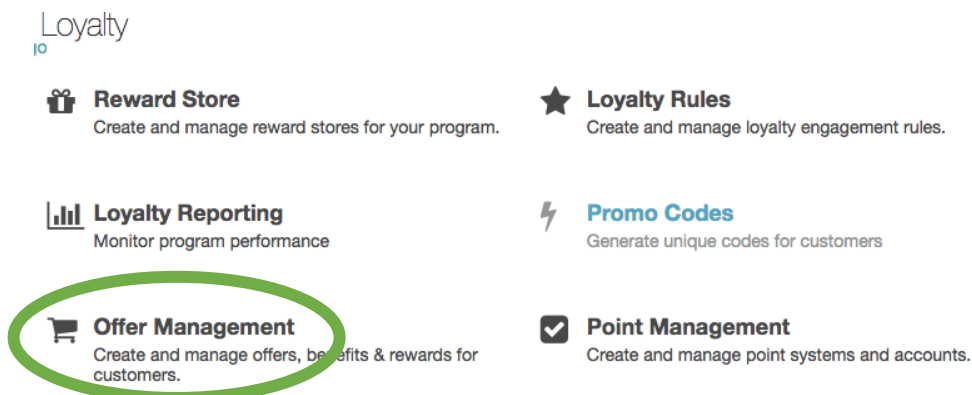
Use Case Walkthrough

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.

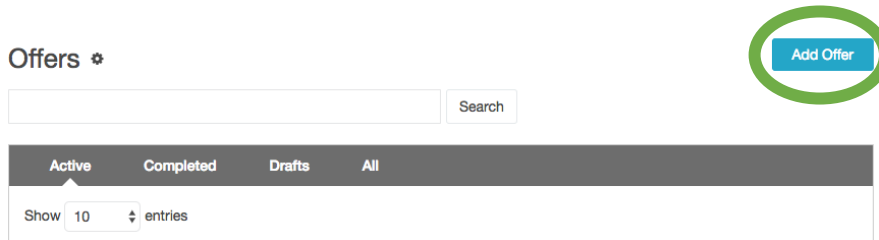
Create Offer in SessionM Offers Module

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

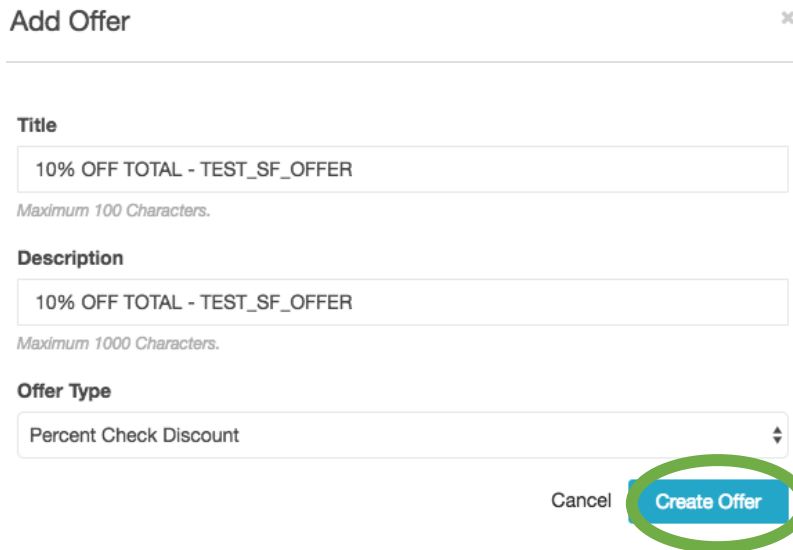
1. Navigate to SessionM Offer Management Module.



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

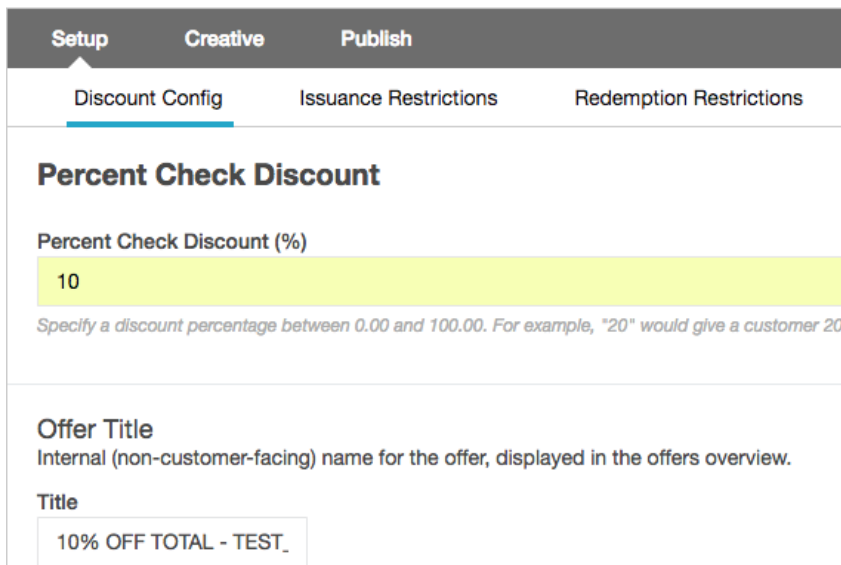


3. Enter the title and description. Then select the Offer Type.



The screenshot shows the 'Add Offer' form. It has a title field containing '10% OFF TOTAL - TEST_SF_OFFER' with a note 'Maximum 100 Characters.' Below it is a description field with the same text and a note 'Maximum 1000 Characters.' The 'Offer Type' dropdown is set to 'Percent Check Discount'. At the bottom right, there are 'Cancel' and 'Create Offer' buttons, with the 'Create Offer' button circled in green.

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



The screenshot shows the 'Setup' tab of the offer configuration. It has sub-tabs for 'Discount Config', 'Issuance Restrictions', and 'Redemption Restrictions'. The 'Discount Config' sub-tab is active. The main heading is 'Percent Check Discount'. Below it, the 'Percent Check Discount (%)' field is highlighted in yellow and contains the value '10'. A note below reads: 'Specify a discount percentage between 0.00 and 100.00. For example, "20" would give a customer 20'. Below this is the 'Offer Title' section, which includes a description: 'Internal (non-customer-facing) name for the offer, displayed in the offers overview.' and a title field containing '10% OFF TOTAL - TEST_'.

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

Close Publish

Create Audience in the SessionM Audience Module

Now, define the audience to whom the offer will be made.

1. Navigate to Audiences Module on the SessionM dashboard.

Customers & Audiences

Customers
Manage the members who engage with your program.

Audiences
Build targeting bundles for campaigns and promotions.

2. Click the **Create Audience** button.

All Audiences Search Create Audience

Audiences					
Status	Audience	Type	Created By	Created On	
Active	size_of_one	Customer	QI	01/25/2019	
Active	Test-3	Customer	QI	01/25/2019	
Active	Test-2	Customer	QI	01/25/2019	
Active	Test-1	Customer	QI	01/25/2019	

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

All Audiences > Create Audience

Setup Targeting

Audience Name

Type

Next

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

All Audiences > Offer Test Audience

Draft Offer Test Audience Delete Activate

Targeting

Gender

AND

State

Include

Add Attributes

Estimated Audience Size (real-time data)
72 users
*Does not reflect individual customer's message permissions.

Targeting Summary
Included
• Gender
• Female

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

Configure Audience Export in SessionM Audience Module

Set up an audience export in the SessionM Audience Module.

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

All Audiences > Offer Test Audience

Active Offer Test Audience Delete Export

Details Exports Offer Issuance

Audience Size Over Time
Data as of Last Processed Date

Start date ~ End date

Estimated Audience Size (as of last processed date)
72 (1% of Total User Base)

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

[All Audiences](#) > [Offer Test Audience](#) > Export

Active Offer Test Audience

Setup Attributes Notification

Basic Details

Name

File Name

Export Active

- 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. (For instructions on setting up a destination, see SFTP set up in Audience Export.)

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

Line Feed (\n) ▼

Field Delimiter

Other ▼

Delimiter value (single character)

|

- In the Attributes List, set the **User ID** attribute. No other attributes are need. When the offers are exported, a preset format is used to generate the file.

Attribute List

Attribute	User ID ▼
Label	User ID

[+ Add Attribute](#)

- Optionally, 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

12. 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	Destination
Offer Test Audience	One Time	Never	01/29/19 10:57	CSV	TEST

13. 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	Destination
● In-Progress	Offer Test Audience	One Time	01/28/19 12:31:05	—	CSV	TEST

Issue Offer to Audience

The final step in the SessionM platform is to issue the offer to the audience.

1. On the All Audiences page of the SessionM Audiences Module, select the audience to which you want to issue the offer.

Audiences		
Status	Audience	Type
● Active	Offer Test Audience	Customer

2. Click the **Offer Issuance** tab and then click the **Add Offer** button.

[All Audiences](#) > [Offer Test Audience](#)

Active Offer Test Audience

Details Exports Offer Issuance
Issue Bulk Offers
+ Add Offer
Issue Offer

3. Select the offer to issue, then click the **Add** button.

Select an Offer

Search by name or type

Name	Offer Type	Description	Offer Start Date	Offer End Date
<input checked="" type="radio"/> \$5 off Check b	Fixed Amount Item Discount	5 Dollars off your next check	12/21/2018	
<input type="radio"/> 50% off second item	Buy X Get Y Percent	By one, get 50% off	12/29/2018	
<input type="radio"/> Perpetual Offer	Percent Item Discount	Place in reward store to always use	01/16/2019	
<input type="radio"/> TEST-OFFER	Buy X Get Y Percent	TEST-OFFER	01/09/2019	
<input type="radio"/> XYZ	Buy X Get Y Percent	XYZ	01/17/2019	

< 1 >

Cancel **Add**

4. Click the **Issue Offer** button to add the offer to the list of bulk offers.

Details Exports **Offer Issuance**

Issue Bulk Offers

[Add Offer](#)

Name	Offer Type	Description	Offer Start Date	Offer End Date
\$5 off Check b	Fixed Amount Item Discount	5 Dollars off your next check	12/21/2018	<input checked="" type="checkbox"/>

Issue Offer

5. When prompted, click the **OK** button to issue the offer.

Are you sure?

Issue the offer to everyone in the audience?

Cancel **OK**

A modal appears with a message that the "Bulk Offer request sent to Server for processing".

Bulk offer request sent to server for processing.

Delete **Export**

6. View the export job status on the Offer Issuance tab.

History [Refresh](#)

Status	Offer	Audience size	Processed	Errors	Issued by	Issue date
Completed	\$5 off Check	72	72	0	QI	01/28/2019 1:43pm

Offer Data Exported to SFTP

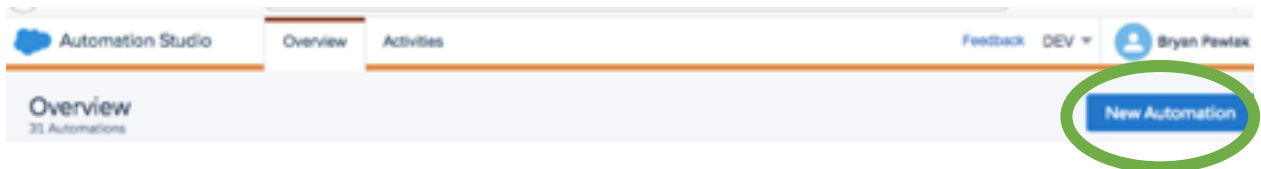
SessionM Offer Export Service then generates a CSV file and transfers the file to a configured SFTP.

SFMC Automation Studio Job – Import Offer Data

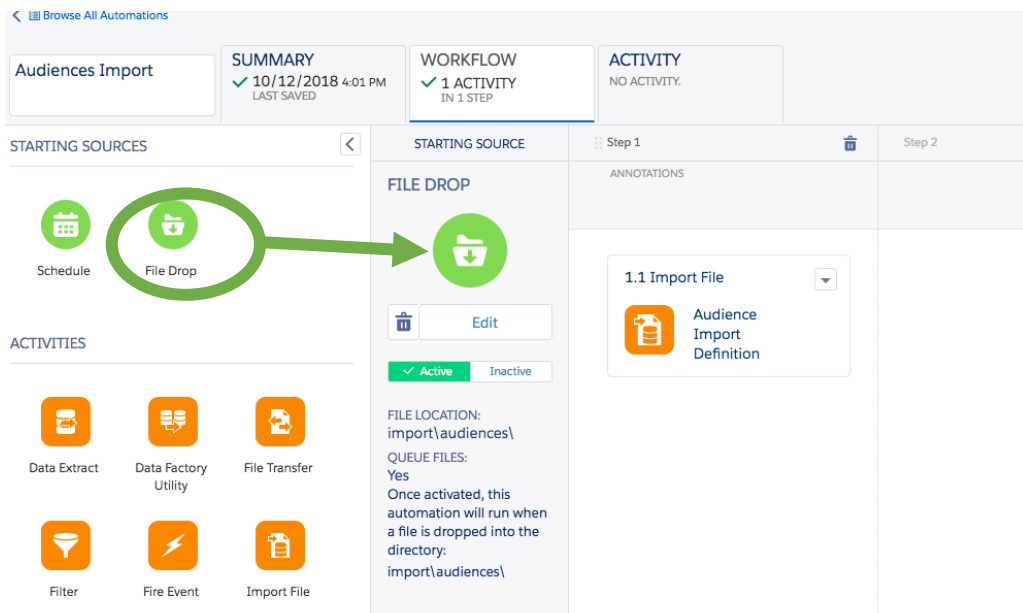
Note: Only one Automation Studio job is required to support importing SessionM Offers (bulk or triggered). Skip the following procedure if an Automation Studio job has already been configured for SessionM offers.

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.

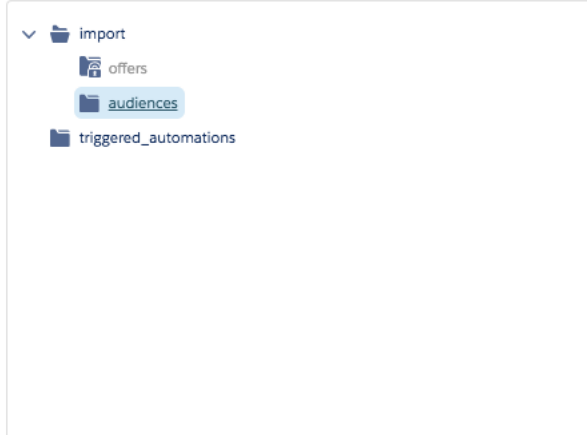
In this example we have configured export of audience file to an “audiences” folder in SFTP.

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.

The screenshot shows the configuration for an automation named "Audiences Import". The interface includes a "STARTING SOURCES" section with "File Drop" selected. The "ACTIVITIES" section shows "Import File" as the active activity. The "FILE DROP" configuration details are visible, including the file location "import\audiences\" and the queue files setting "Yes". The "1.1 Import File" activity is circled in green.

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

Edit Import Definition

ACTIVITY INFO IMPORT FILE DESTINATION MAPPING REVIEW

Name: Audience Import Definition

Description: Add description here...

External Key: C891B026-B9A0-4CFC-B817-8DF8E44858A9

Send notification email to: integration@sessionm.com
An email is sent when an import completes.

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

File Location*: SessionM Audiences

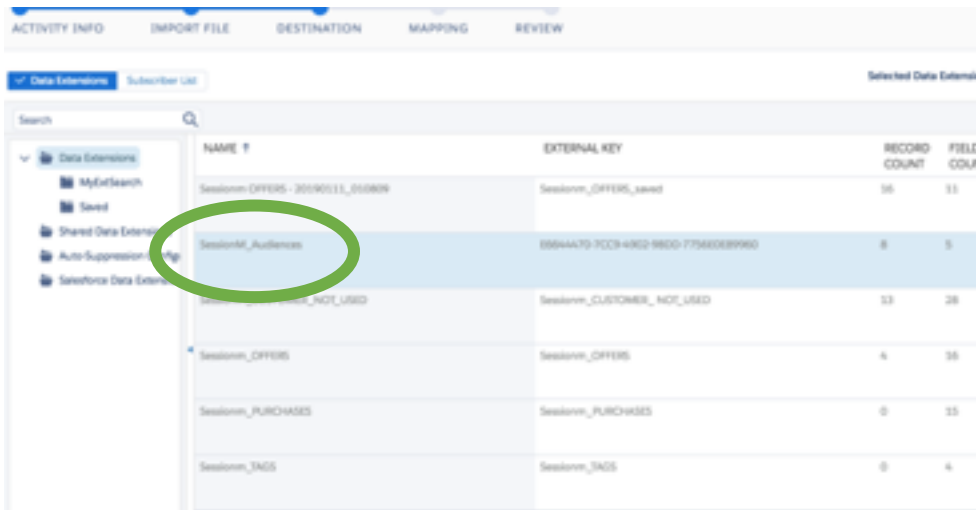
This is a current view of your chosen file location:

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

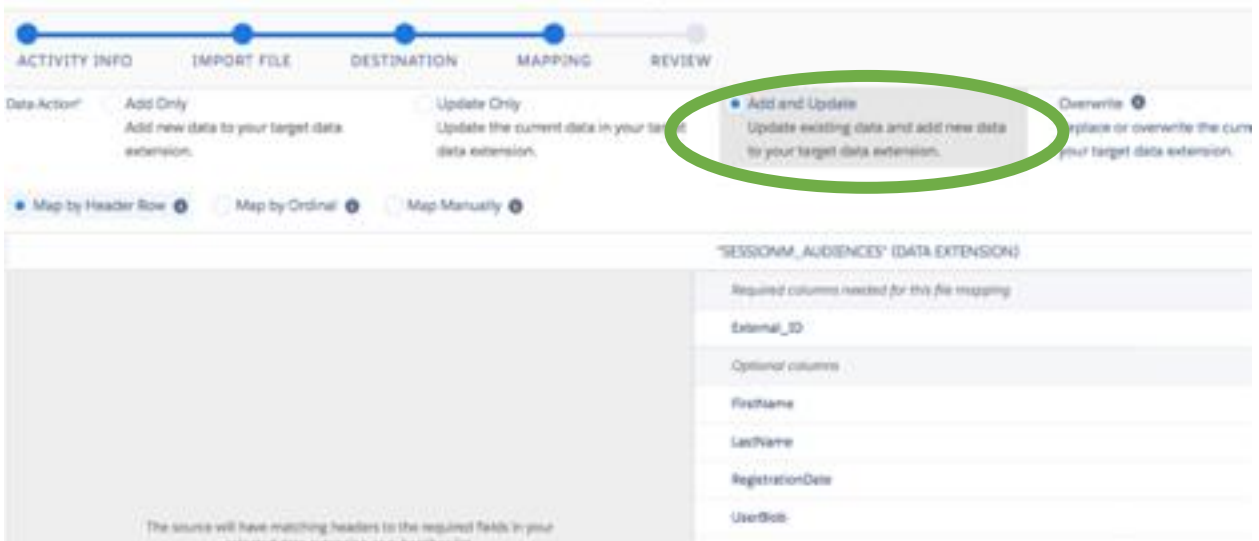
File Naming Pattern*: %%FILENAME_FROM_TRIGGER%%

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.

ACTIVITY INFO IMPORT FILE DESTINATION MAPPING REVIEW

Activity Info Edit

Name: Audience Import Definition
 External Key: C891B026-B9A0-4CFC-8B17-8DF8E44858A9
 Email Notification: integration@sessionm.com
 Description:

Destination Edit

Data Extension: SessionM_Audiences

Import File Edit

File Location: SessionM Audiences
 File Naming Pattern: %%FILENAME_FROM_TRIGGER%%
 Date Format: English (United States)
 Delimiter: Comma
 Bad Data Behavior: Skip rows with bad data
 Import Options: Respect double quotes (") as a text delimiter

Mapping Edit

Data Action: Add and Update
 File Mapping: Map by Header Row

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.

Audiences Import SUMMARY ✓ 2/28/2019 1:20 PM LAST SAVED WORKFLOW ✓ 1 ACTIVITY IN 1 STEP ACTIVITY NO ACTIVITY

Save

STARTING SOURCES: Schedule, File Drop

ACTIVITIES: Data Extract, Data Factory Utility, File Transfer

FILE DROP Edit Active

1.1 Import File
 Audience Import Definition

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

Data Extensions < Sessionm_OFFERS

Sessionm_OFFERS

Properties Records

Offer_Order_ID Search Import Export Edit Record Clear Record Clear Records Add Record

Offer_Order_ID	User_Order_ID	User_ID	External_ID	Offer_ID	Offer_Name	Offer_Description	Offer_Type	Offer_Status	Status_Date	Acquire_Date	Redemption_Start_Date	Redemption_End
6526	20c4153b-d287-46a5-99a9-10a08cfa75a5	ca284d4-134a-11e9-8184-b1f02c246cc4	ca284d4-134a-11e9-8184-b1f02c246cc4	3d855dd7-3365-41ab-9210-8bf133575276	Fixed Amount Test Offer	Fixed Amount Test Offer	fixed_amount_discount	ISSUED	3/5/2019 10:24:41 AM	3/5/2019 10:24:41 AM	2/2/2019 6:00:00 PM	
6527	59503790-7489-4650-8fd0-4d9f0dcbcd7	ca284d4-134a-11e9-8184-b1f02c246cc4	ca284d4-134a-11e9-8184-b1f02c246cc4	3d855dd7-3365-41ab-9210-8bf133575276	Fixed Amount Test Offer	Fixed Amount Test Offer	fixed_amount_discount	ISSUED	3/5/2019 10:36:57 AM	3/5/2019 10:36:57 AM	2/2/2019 6:00:00 PM	
6528	9337ec3f-02ae-4551-a8af-74b66e8a8fcd	ca284d4-134a-11e9-8184-b1f02c246cc4	ca284d4-134a-11e9-8184-b1f02c246cc4	3d855dd7-3365-41ab-9210-8bf133575276	Fixed Amount Test Offer	Fixed Amount Test Offer	fixed_amount_discount	ISSUED	3/5/2019 10:40:32 AM	3/5/2019 10:40:32 AM	2/2/2019 6:00:00 PM	
6529	6a8d295-d220-4f6a-a842-01954c78d243	ca284d4-134a-11e9-8184-b1f02c246cc4	ca284d4-134a-11e9-8184-b1f02c246cc4	3d855dd7-3365-41ab-9210-8bf133575276	Fixed Amount Test Offer	Fixed Amount Test Offer	fixed_amount_discount	ISSUED	3/5/2019 10:48:53 AM	3/5/2019 10:48:53 AM	2/2/2019 6:00:00 PM	
6530	d39fb35-3cb7-4e16-8f3a-fde80cbe161	ca284d4-134a-11e9-8184-b1f02c246cc4	ca284d4-134a-11e9-8184-b1f02c246cc4	3d855dd7-3365-41ab-9210-8bf133575276	Fixed Amount Test Offer	Fixed Amount Test Offer	fixed_amount_discount	ISSUED	3/5/2019 2:34:34 PM	3/5/2019 2:34:34 PM	2/2/2019 6:00:00 PM	
6531	07fa1f02-	ca284d4-	ca284d4-	3d855dd7-	Fixed	Fixed Amount	fixed amount discount	ISSUED	3/5/2019	3/5/2019	2/2/2019 6:00:00 PM	

1 - 8 of 8 items 25 Per Page Page 1 of 1