



# SALESFORCE MARKETING CLOUD USE CASE

## Trigger an Offer Based on Behavior

### Abstract

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

February 2019

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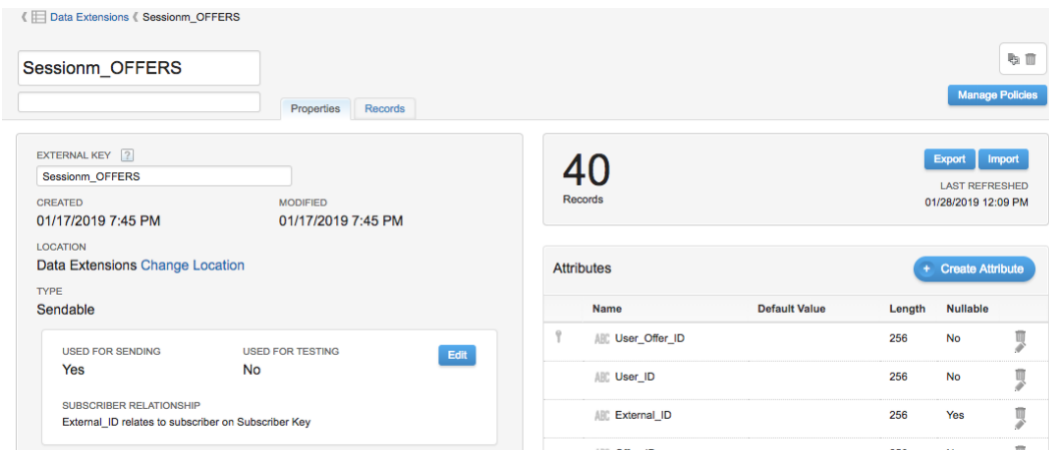
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# Trigger Offer Based on Behavior

This use case demonstrates how you can leverage rules in the SessionM Campaign Module and 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.



Sessionm\_OFFERS

Properties Records Manage Policies

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 [Edit](#)

SUBSCRIBER RELATIONSHIP  
External\_ID relates to subscriber on Subscriber Key

40 Records

Export Import

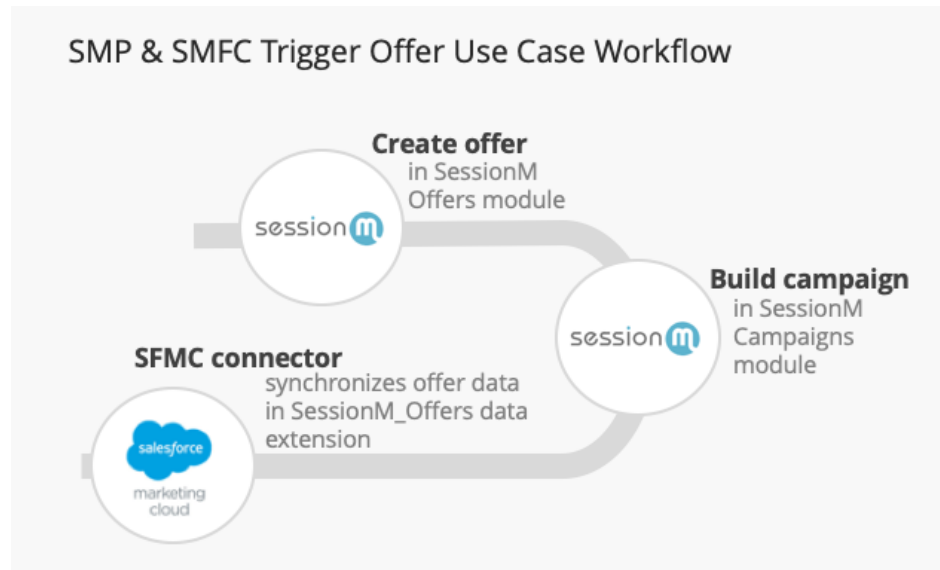
LAST REFRESHED 01/28/2019 12:09 PM

Attributes [+ Create Attribute](#)

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

## Use Case Workflow

The following image shows the workflow for triggering an offer based on customer behavior.



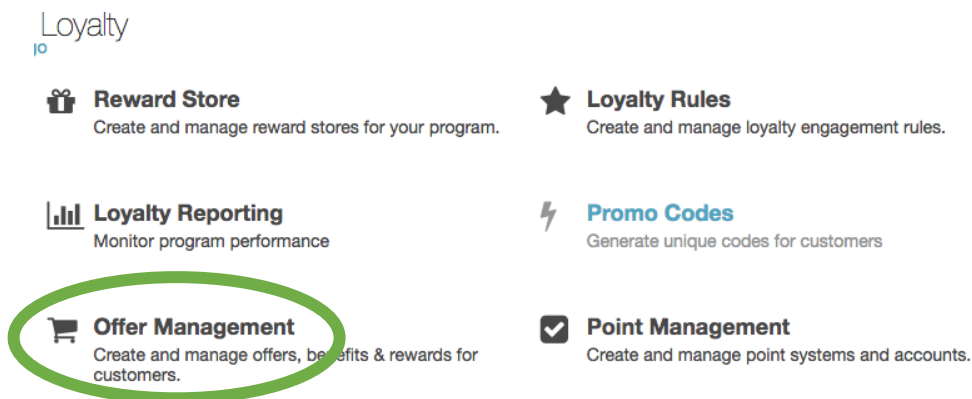
## Use Case Walkthrough

The following procedure describes the steps to create a campaign with rules, 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.

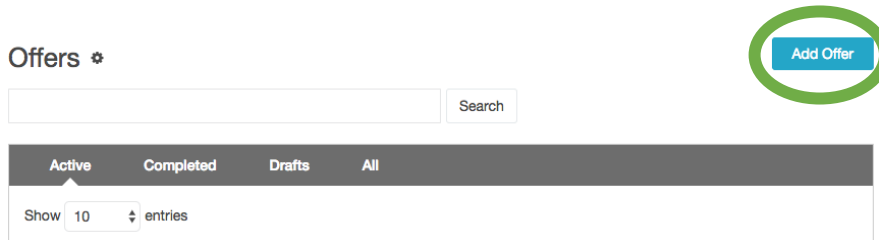
### Create Offer in SessionM Offers Module

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** ×

---

**Title**  
  
Maximum 100 Characters.

**Description**  
  
Maximum 1000 Characters.

**Offer Type**

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

**Setup** **Creative** **Publish**

Discount Config Issuance Restrictions Redemption Restrictions

---

**Percent Check Discount**

**Percent Check Discount (%)**  
  
Specify a discount percentage between 0.00 and 100.00. For example, "20" would give a customer 20

---

**Offer Title**  
 Internal (non-customer-facing) name for the offer, displayed in the offers overview.

**Title**

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

Cancel **Publish**

## Build Campaign in SessionM Campaigns Module

1. Navigate to the Campaigns Module in the SessionM platform.



2. On the Campaigns dashboard, click the **Create Campaign** button.



3. Select the **Promotion** campaign type and enter a campaign name.

Choose your campaign type

▼ Standard

- Messaging
- Promotion**
- Participation Challenge
- SMS Opt In
- Global SMS Opt In

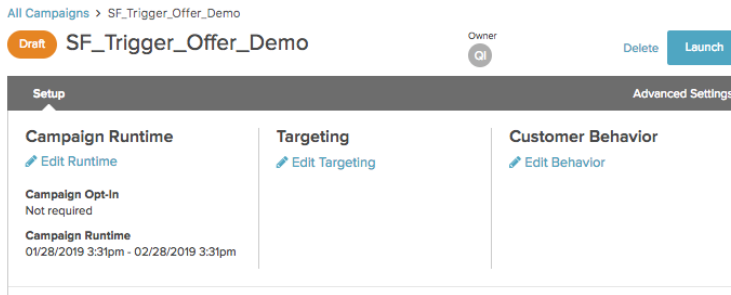
**Promotion**

Promote an offer and/or incentivize users to perform a specific behavior.

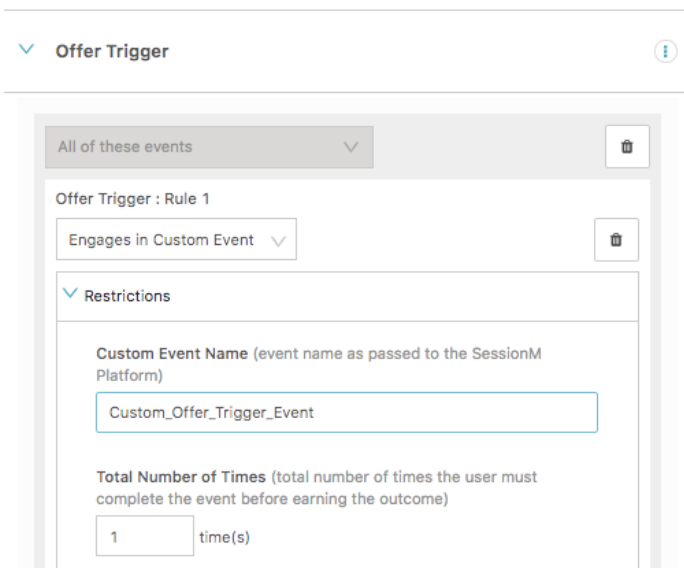
**Name your campaign\***

Cancel

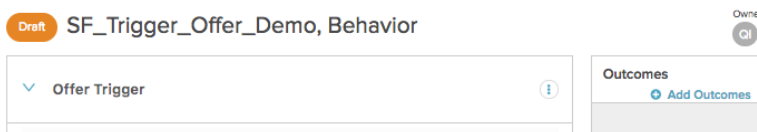
- Under Customer Behavior, click the **Edit Behavior** link.



- Use the Behavior Builder to define the rule set that triggers the offer. In this example, a custom event named **Custom\_Offer\_Trigger\_Event** is used to trigger the campaign rules.



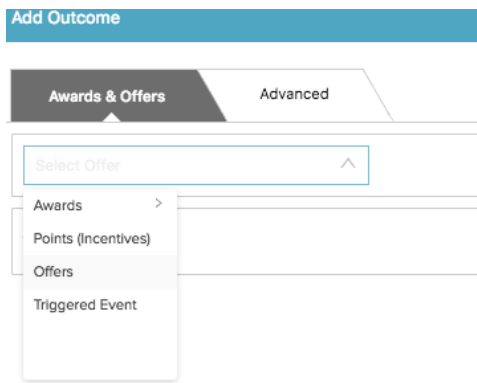
- Under Outcomes, click the **Add Outcome** link.



- On the Add Outcome Screen, click the **+ Offer** button.

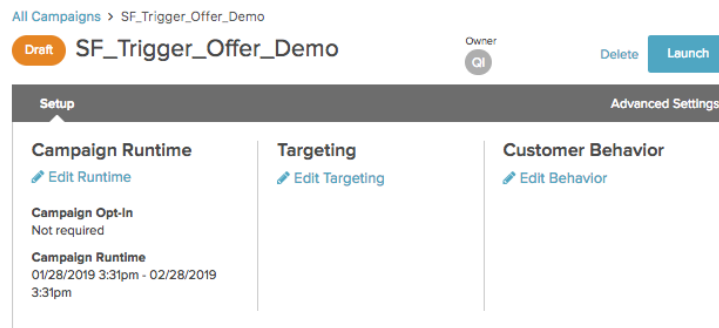


8. Select **+Offers** from the drop down list.



9. Select the offer from the list of available offers, then click the **Save** button.

10. On the Campaigns Setup page, click the **Launch** button to activate the campaign.



Once activated, the Campaign rules engine listens for this behavior and then assigns the offer to the user’s wallet.

## SFMC Connector Synchronizes Offer Data

The SFMC connector listens for triggered offers and automatically synchronizes the offer data to the **SessionM\_Offers** data extension.

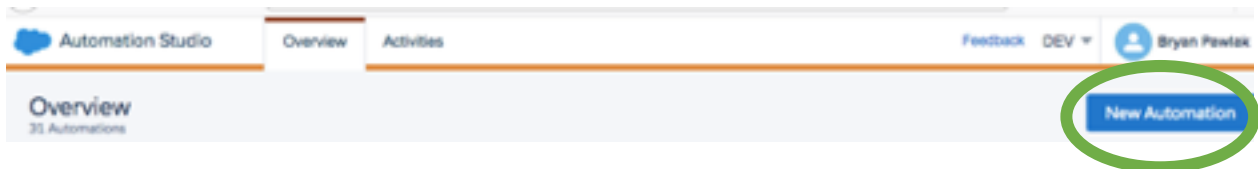


## SFMC Automation Studio Job – Import Offer Data

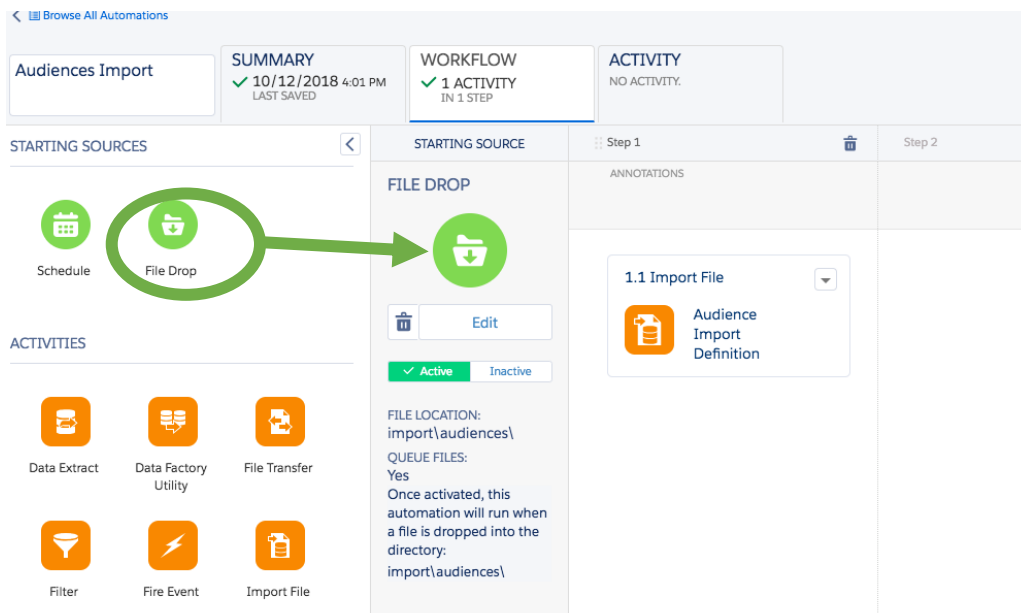
Note: Only one Automation Studio job is required to support importing SesionM offers (bulk or triggered). Skip the following procedure if a Studio Automation job has been configured to issue SessionM offers.

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.

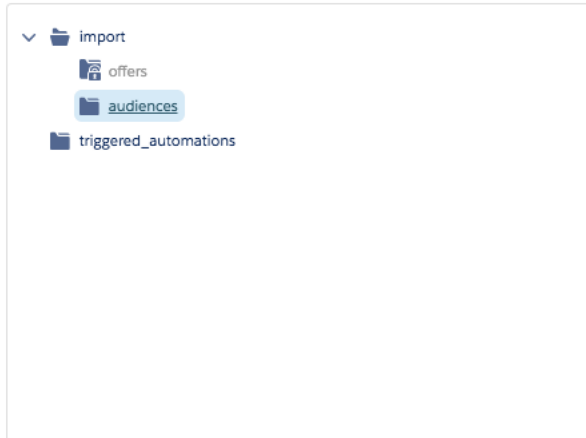
In this example we have configured export of audience file to an “audiences” folder in SFTP.

### File Drop Setup

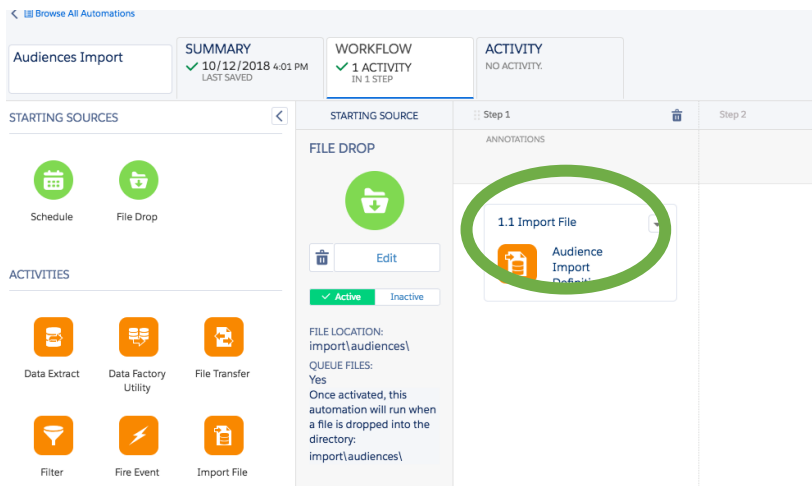
#### Choose Directory

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".

- 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 Configuration:**

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

**1.1 Import File Activity:** Audience Import Definition

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

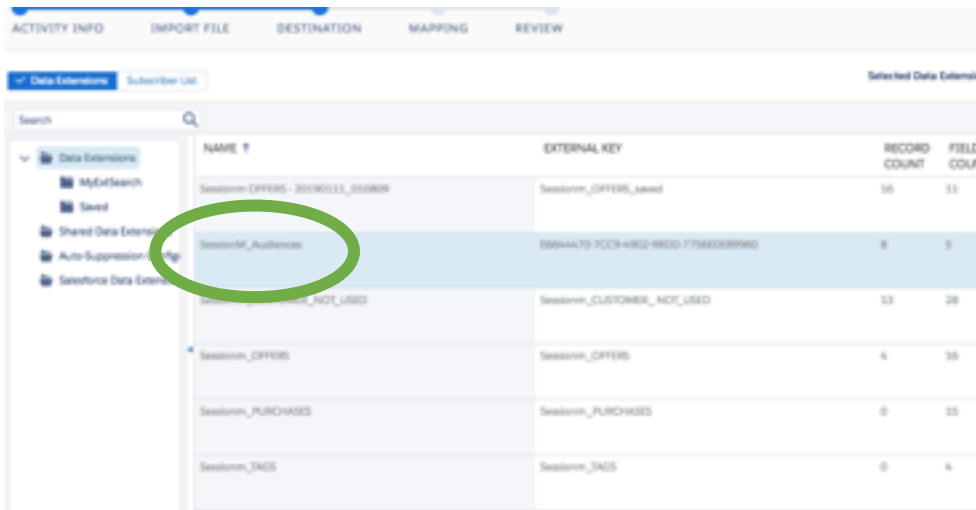
This is a current view of your chosen file location:

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

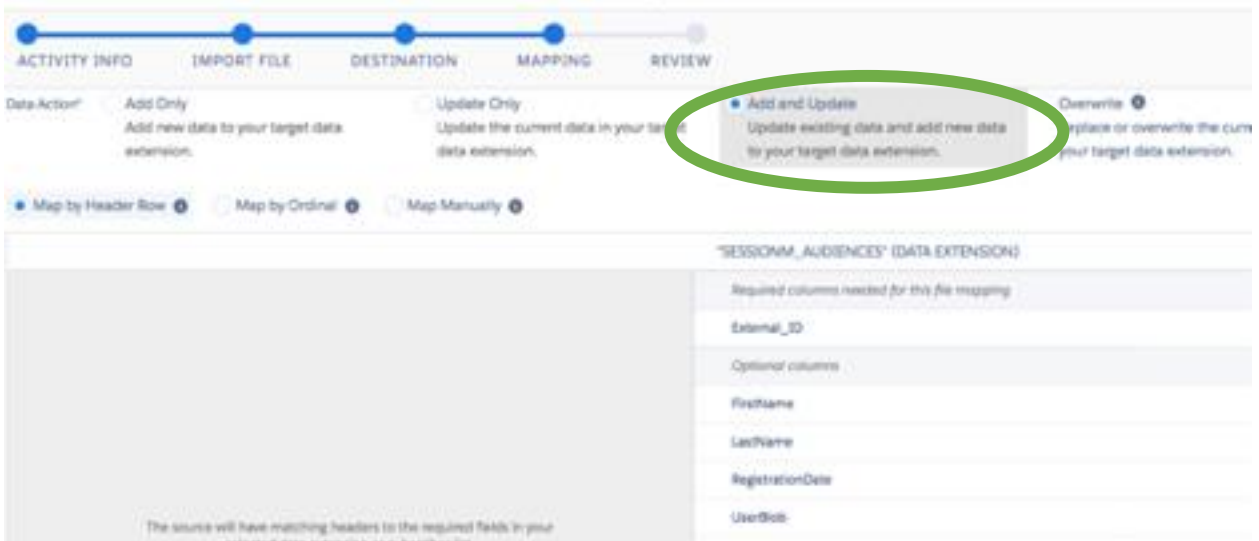
File Naming Pattern\*: %%FILENAME\_FROM\_TRIGGER%%

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

<input type="checkbox"/>	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
<input type="checkbox"/>	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	
<input type="checkbox"/>	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	
<input type="checkbox"/>	6528	9337ec3f-02ae-4551-a8af-74b66e8a8f6f	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	
<input type="checkbox"/>	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	
<input type="checkbox"/>	6530	d39fb35-3cb7-4e16-8f3a-fde80cfe161	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	
<input type="checkbox"/>	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