

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.

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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.

Image: Contract of the second seco	3						
Sessionm_OFFERS							₿. П
	Properties Records					Manage	Policies
EXTERNAL KEY			10			Export Im	port
Sessionm_OFFERS		4	ŧU		_	LAST REFRE	SHED
CREATED	MODIFIED	Re	cords		01	1/28/2019 12:0	09 PM
01/17/2019 7:45 PM	01/17/2019 7:45 PM						
LOCATION							
Data Extensions Change Location	n	Attr	ibutes		•	Create Attri	bute
TYPE					_		
Sendable			Name	Default Value	Length	Nullable	
USED FOR SENDING	USED FOR TESTING Ed	Ŷ	ABC User_Offer_ID		256	No	
Yes	No		ABC User_ID		256	No	1
SUBSCRIBER RELATIONSHIP External_ID relates to subscriber on	Subscriber Key		ABC External_ID		256	Yes	
			All [®] Offer ID		256	No	Π



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.
- 4 | SessionM Salesforce Marketing Cloud Use Case: Trigger an Offer Based on Behavior © 2019 SessionM



Offers *					Add Offer
				Search	
Active	Completed	Drafts	All		
Show 10	entries				

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

Add Offer		×
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		*
	Cancel	Create Offer

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

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

- 5. On the Publish page, click the **Publish** button to activate the offer.
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Culture: en	
Title 10% OFF TOTAL - TEST_SF_OFFER	
Description	
10% OFF TOTAL - TEST_SF_OFFER	
Terms and Conditions	
None	
Graphic	
None	

Build Campaign in SessionM Campaigns Module

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

Campaigns & Content

	Creative Templates	Campaigns
5	Build and manage templates for use within Campaigns.	Create messaging campaigns & promotions to drive high valued behaviors.

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

Messaging	Promotion
Promotion	Promote an offer and/or incentivize users to perform a
Participation Challenge	specific behavior.
SMS Opt In	Name your campaign*
Global SMS Opt In	SF_Trigger_Offer_Demo



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

All Campaigns > SF_Trigger_Offer_Demo Draft SF_Trigger_Offer_I	Demo	Owner	Delete Launch
Setup			Advanced Settings
Campaign Runtime Campaign Opt-In Not required Campaign Runtime 01/28/2019 3:31pm - 02/28/2019 3:31pm	Targeting	Custon ♂ Edit Be	ner Behavior ehavior

5. 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.

\sim	Offer Trigger	
	All of these events V	Ŭ
	Offer Trigger : Rule 1	
	Engages in Custom Event 🗸	
	✓ Restrictions	
	Custom Event Name (event name as passed to the SessionM Platform)	
	Custom_Offer_Trigger_Event	
	Total Number of Times (total number of times the user must complete the event before earning the outcome)	
	1 time(s)	

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



7. On the Add Outcome Screen, click the + Offer button.

Add Outcome		
Awards & Offers	Advanced	
+ Offer		



8. Select +Offers from the drop down list.

Awards & Offers	Advanced
elect Offer	^
wards >	
oints (Incentives)	
Offers	
riggered Event	

- 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.

Draft SF_Trigger_Offe	er_Demo	Owner	Delete Launch
Setup			Advanced Settings
Campaign Runtime Campaign Opt-In Not required Campaign Runtime 01/28/2019 3:31pm - 02/28/2019 3:31pm	Targeting	Custo ♂ Edit	mer Behavior Behavior

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.

Automation Studio	Overview	Activities	Feedback	DEV - Bryan Pawlak
Overview 31 Automations				New Automation

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

< I≡I Browse All Autom	ations							
Audiences Impo	ort	SUMMARY 10/12/2018 4:01 LAST SAVED	PM	WORKFLOW 1 ACTIVITY IN 1 STEP	ACTIVITY NO ACTIVITY.			
STARTING SOURCE	ES	<		STARTING SOURCE	Step 1		â	Step 2
A	H		FI	LE DROP	ANNOTATIONS			
Schedule	File Drop				1.1 Impo	rt File	•	
ACTIVITIES			ť	Edit	1	Audience Import Definition		
2	Ę	2	FIL	E LOCATION: port\audiences\				
Data Extract	Data Factory Utility	File Transfer	QU Yes On aut	IEUE FILES: s ice activated, this tomation will run when				
Files		Terrent File	a fi dir im	ile is dropped into the ectory: port\audiences\				
riiter	Fire Event	Import File						

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, filename.	, the automation begins. Select Use filename pattern if the automation will be triggered
No Filename Pattern	V 🎽 import
Use Filename Pattern	 offers audiences triggered_automations

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





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

			Edi	t Import Definition	
•					
ACTIVITY INFO IMPC	RT FILE	DESTINATION	MAPPING	REVIEW	
	Audiend	e Import Definition			
Description	Add des	cription here			
External Key	C891B0	26-B9A0-4CFC-B817-8DF8E	44858A9		
 Send notification email to: 	integrat	on@sessionm.com			
	An email	is sent when an import com	pletes.		

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

File Location*	SessionM Audiences
 import import audiences Audiences-10 	-12-2018.csv
File Naming Pattern*	%%FILENAME_FROM_TRIGGER%%
Example File Name:	%%FILENAME_FROM_TRIGGER%%



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

Oute Extensions Schoolbo	e Citel		Selected Data	External
Search	Q			
🗸 🍓 Data Extensions	NAME *	EXTERNAL KEY	RECORD COUNT	/18J
MyGriffeanth Several	Semicron (201085 - 20190111, 010809	Seniove_OFTOS_saved	36	15
 Shared Oata Extension Auto-Suppression-Config Salestona: Data Extension 	SeniteM_Autorean	85644470-7CC9-4902-9800-775680889980		5
	International Contractor	Sessionry_CUSTONER_NOT_USED	13	28
	* Sessione_CPTERS	Sessiove_OPTUS	4	36
	Sesione_R/ROM585	Seminore_PURCH8385	۰	15
	Semiorer_3A65	Seminver_JAOS		4

8. 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**.

•			_			
ACTIVITY IN	O IMPORT FILE	DESTINATION	MAPPING	REVIEW		
Data Action*	Add Only Add new data to your target data extension.	Update Update data ed	Only the current data in y tension.	our 10 M	Actd and Update Update existing data and add new data to your target data extension.	Overwrite O ryfacie or overwrite the curn ynu'r target data extension.
 Map by Heat 	ar Roe O Map by Ordinal	Map Manus	ny O			
					SEISIONM_AUDIENCES' (DATA EXTENSION)	
					Required courses reacted for this file mapping	
					External_ID	
					Optimiet columns	
					Festivane	
					LaxName	
					RegistrationDate	
	The source will have matching h	eaders to the required fo	and to prove		Unirdicat-	



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

ACTIVITY INFO	IMPORT FILE	DESTINATION	MAPPING	REVIEW	/		
Activity Info				Edit	Import File		
Name	Audionas Import Defin	itica			File Leasting	Cassion M Audianana	
External Key	C891B026-B940-4CEC	-R817-8DF8F4485849			File Naming Pattern	%%FILENAME_EROM_TRIGGER%%%	
Email Notification	integration@sessionm	.com			Date Format	English (United States)	
Description	0				Delimiter	Comma	
					Bad Data Behavior	Skip rows with bad data	
					Import Options	Respect double quotes (") as a text delimiter	
Destination				Edit			
Data Extension	SessionM_Audiences				Mapping		
					Data Action	Add and Update	
					File Mapping	Map by Header Row	
					SOURCE	"SESSIONM_AUDIENCES" (DATA EXTENSION)	
					[Matching Header]	External_ID	
					[Matching Header]	FirstName	
					[Matching Header]	LastName	

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.

([]	Data Extensions (Se	essionm_OFFERS											
Ses	sionm_OFFE	RS											₽ 11
				Properties	Records								
Offer_	Order_ID * Search		2 2	Import Export	Edit Record	Clear Record						Clear Records	+ Add Record
	Offer_Order_ID	User_Offer_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	ca284df4- 134a-11e9- 8184- b1f02c246cc4	ca284df4- 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- 7489-4b50- 8fdc- 4d9fc0dcbcd7	ca284df4- 134a-11e9- 8184- b1f02c246cc4	ca284df4- 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- 74b66e8a6fcf	ca284df4- 134a-11e9- 8184- b1f02c246cc4	ca284df4- 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	6a8d2d95- d220-4f64- a842- 01954c78d243	ca284df4- 134a-11e9- 8184- b1f02c246cc4	ca284df4- 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	d39fbe35- 3cb7-4e16- 8f3a- fde8ccfbe161	ca284df4- 134a-11e9- 8184- b1f02c246cc4	ca284df4- 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-	ca284df4-	ca284df4-	3d855dd7-	Fixed	Fixed Amount	fixed amount discount	ISSUED	3/5/2019	3/5/2019	2/2/2019 6:00:00 PM	
1 - 8 0	f 8 items 25 🔺 F	Per Page										Page 1	🚽 of 1 🕨