SALESFORCE MARKETING CLOUD

How to Set Up a File Drop Automation in SFMC

Abstract

This article describes how to set up a file drop automation in SFMC. You first define a file drop location. You then define an automation that starts when a file is dropped into the file location.

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This article describes how to set up a file drop automation in SFMC. You first define a file drop location. You then define an automation that starts when a file is dropped into the file location.

Key Concepts

Secure File Transfer Location

A *secure file transfer location* is an SSH File Transfer Protocol (SFTP) site used to transfer files to or from your Marketing Cloud account. File transfer locations are maintained on the Admin tab of the application. You must have administrative permissions to access this screen.

NOTE: Marketing Cloud is eliminating standard FTP as an option for all future customers effective immediately. Standard FTP will be removed as an option for existing customers in the future. Salesforce recommends that customers using standard FTP migrate their solutions to SFTP as soon as possible.

File Drop

A *file drop automation* begins automatically when a file is dropped into a designated enhanced FTP folder rather than on a schedule. You use other processes that update files in an FTP folder, and you want to create an automation that starts when activity occurs in that folder.

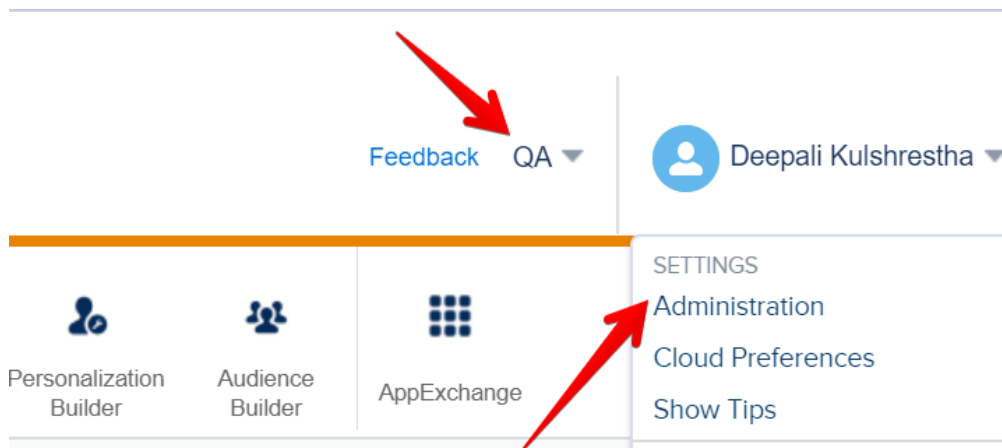## Order of Operations: Create File Drop Automation

Complete the following steps to create a file drop automation. You must have administrator privileges to complete this procedure.

1. Edit FTP users.

2. Create file transfer location.

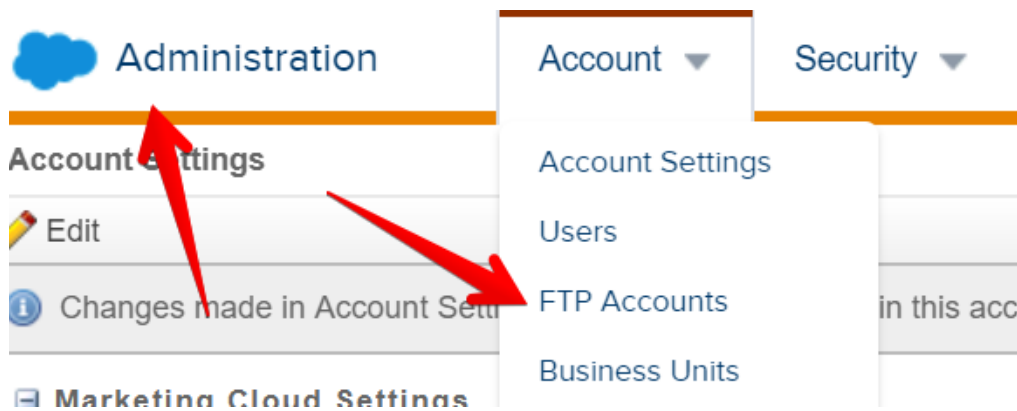3. Create file drop automation.

4. Test automation.

Step 1. Edit FTP Users (If Using SFMC SFTP Facility)

Note: Complete this step only if you are using the SFMC SFTP facility.

1. Go to the STG POS Sapient environment in SFMC.

2. In the Settings menu, click **Administration**.

3. Select **Account** and the select **FTP Accounts**.

4. Edit the FTP users.

Step 2. Create File Transfer Location

1. Go to Email Studio and select **Email**.

2. Click **Admin** and then **File Locations**.

3. Complete the information in the Properties section:

- **Name** - Name of file location. This name appears as a valid value in the File Location field when you create an activity. Use this name to identify the activity in the application. This name is configurable. You can configure any location within the SFTP site.

- **External Key** - Value you choose that uniquely identifies the file transfer location. Use this value to identify the file transfer location when using the API.

- **Description** - Description of the file transfer location. Use this description to further identify the file transfer location within the application.

4. Complete the information in the Location Information section:

- **Location Type** - Identifies the type of file transfer location. External SFTP Site.
- **URL** - The URL of the file transfer location.
- **Port** - The port used to transfer data. This value defaults to 21 for unsecured locations, and you can set the port to 22 for secure FTP locations.
- **Username** - The username the activity uses to log in to access the files.
- **Password** - The password the activity uses to log in to access the files.
- **Retype Password** - The confirmation of the password.

5. Click **Save**.

Step 3. Define File Drop Automation

1. In Automation Studio, click **New Automation** and select **File Drop**.
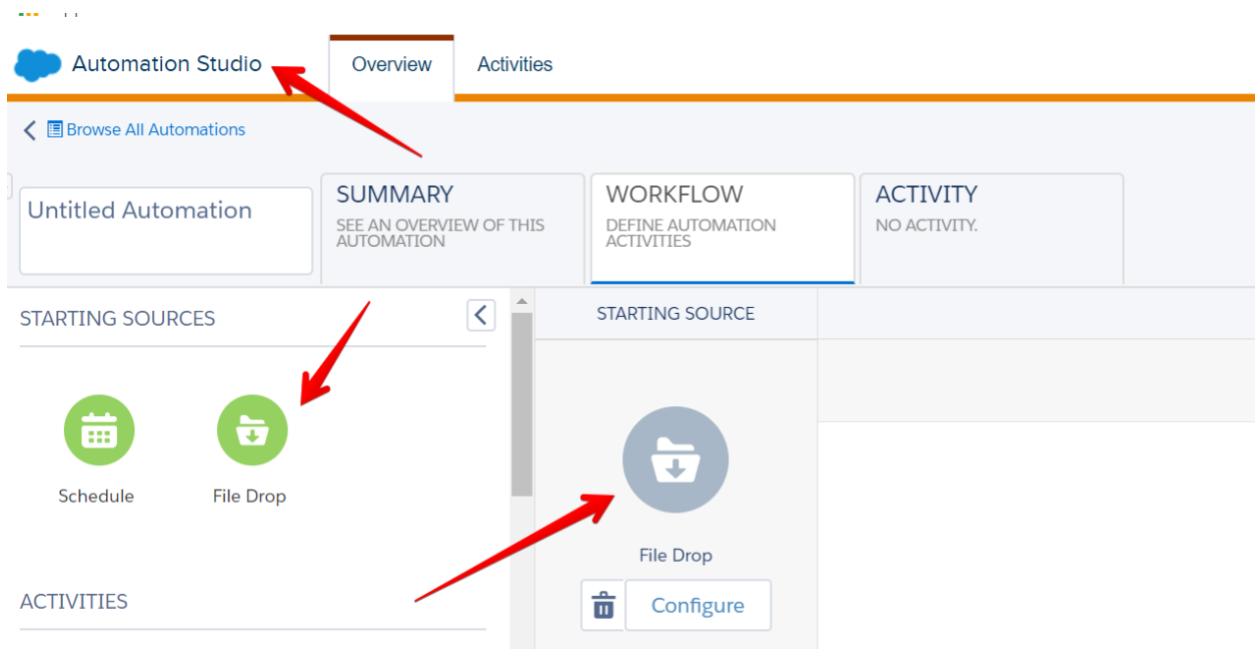
2. Click **Configure**.

3. Choose whether to use a filename pattern. For this example, select **No Filename Pattern**, which means that you assign a directory as a trigger for one automation at a time.

4. Select the directory for the system to watch. When a file is dropped in this folder, the automation starts.

5. Select the Import File activity.
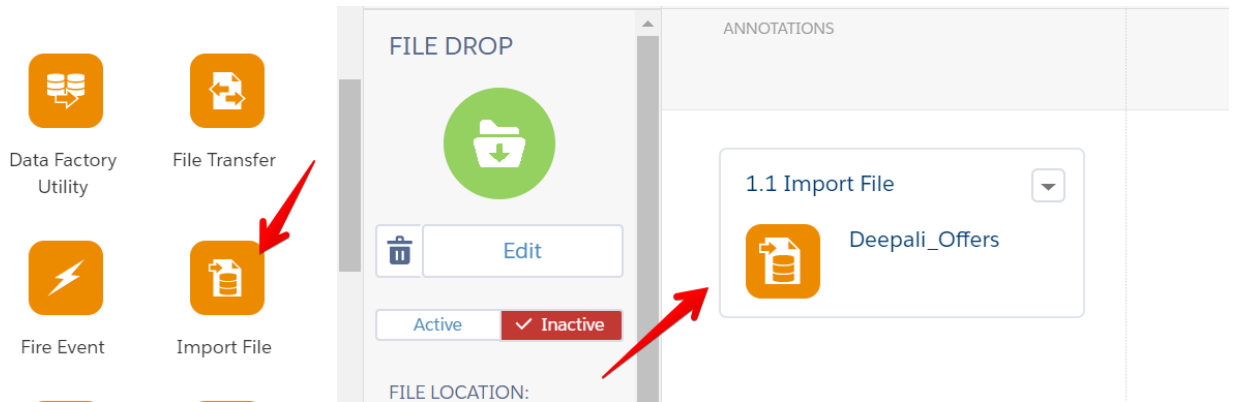
6. Create a new import definition
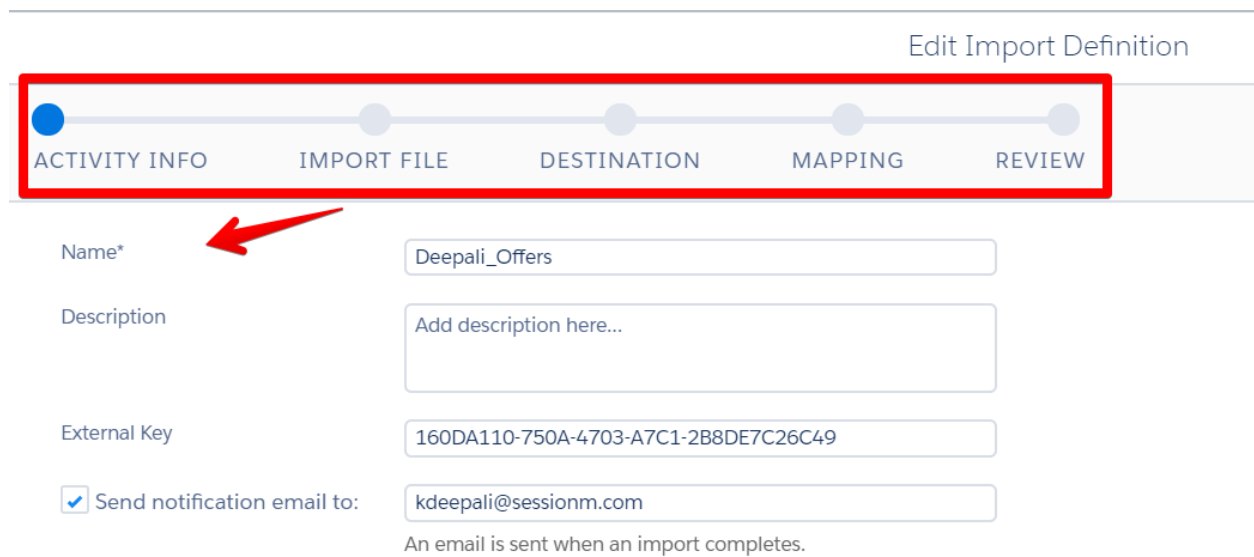
7. Supply the required information for the activity.
   - File Location: Select your file location.
   - File Naming Pattern: Insert "%%FILENAME_FROM_TRIGGER%%".
   - Delimiter: Select **Other** and insert "|".

8. Select **Data Extension** and then **SessionM_Offers**.

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9. Select **Add and Update**.

10. Review the import definition.
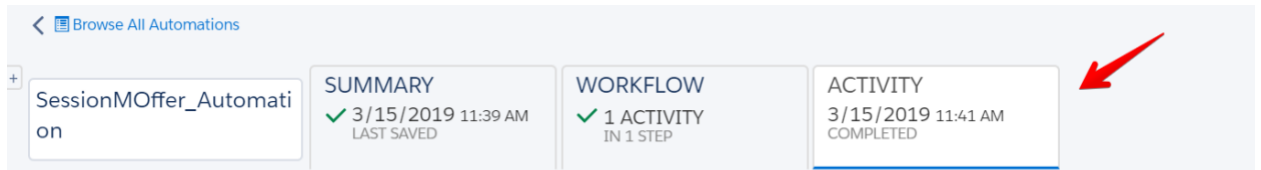
11. Save and activate your automation.

Step 4. Test Automation

1. Place a data extension file in the new folder.

2. Check your Activity Log to see your success and error rate.