SessionM Loyalty for Service Cloud Administration Guide

Version 2.7 Moraine: *August 2023*

Overview

Note on this Documentation

This administration guide describes the installation and configuration process for the SessionM Loyalty for Service Cloud managed package v2.7 Moraine, released in August 2023.

If your Salesforce instance already has v1.x of the package installed and you are planning to upgrade to v2.x, please follow the instructions in our migration guide instead: SessionM Loyalty for Service Cloud Migration Guide.

What Is SessionM Loyalty for Service Cloud?

The SessionM Loyalty Cloud empowers the world's most innovative brands to forge stronger, more loyal and more profitable customer relationships by combining the benefits of the SessionM platform and Salesforce Service Cloud to provide customer service agents with a robust set of capabilities.

Service Cloud is Salesforce's enterprise customer service solution enabling customer service agents to handle incoming cases filed by customers with a variety of specialized tools. SessionM syncs with Service Cloud to provide a customer's profile information, recent purchase transactions and behaviors, as well as the ability to enroll new customers into a loyalty program and award loyalty points or issue offers as compensation.

Use Cases

There is a wide variety of tasks supported by SessionM Loyalty for Service Cloud, including enrolling a customer in SessionM, updating customer information, awarding loyalty points, or offering a loyalty program to a customer.

Please check our Salesforce Service Cloud Use Case document for more details on how to manage SessionM loyalty data for a customer from Salesforce Service Cloud.

Installation

Requirements

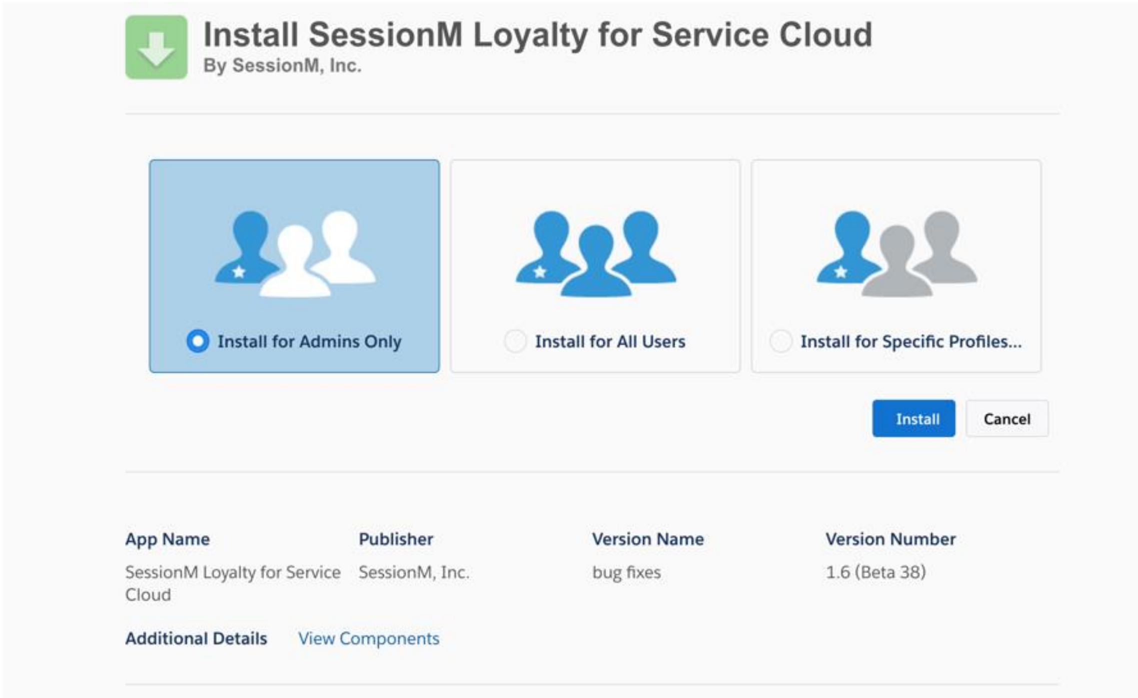
Before you install the SessionM Loyalty managed package, please check that the following requirements are met:

1. Your Salesforce Edition must be Enterprise or Unlimited.
2. You must have the package installation link for the managed package.
3. You must have the API settings for configuring the connection to SessionM platform. Contact your SessionM Integration Engineer or Project Manager to ensure you have the correct API settings.
4. You must deploy My Domain in your org to use the Lightning Web Components of the SessionM Loyalty package. For more information please refer to the official Salesforce documentation: My Domain Is Required to Use Lightning Components in Your Salesforce Org.

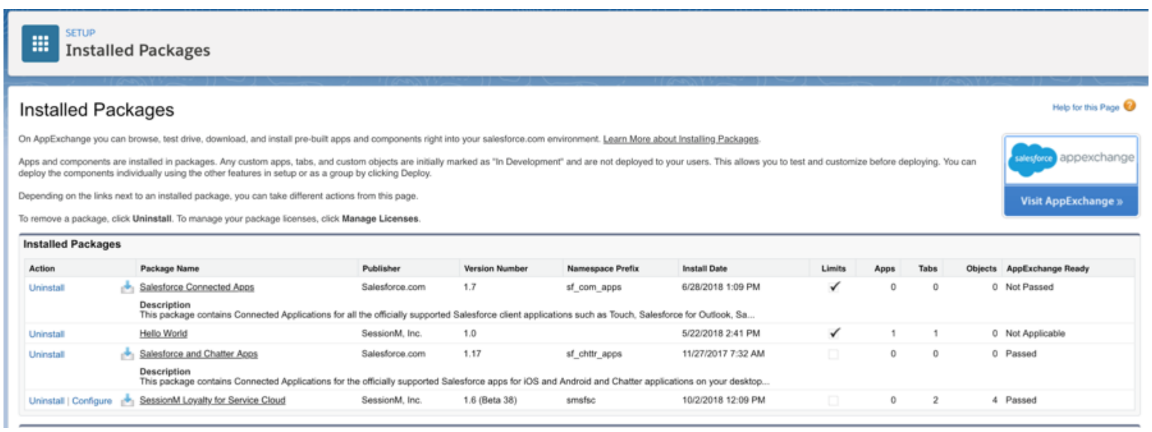
Install the SessionM Loyalty Package

Once you meet all the requirements you can install the SessionM Loyalty managed package into your Salesforce org:

1. Open the package installation URL in your browser. SessionM Loyalty can be installed in both production and sandbox environments. Use the production or sandbox installation URL depending upon your target environment.
2. If you are asked to login, log into your Salesforce org as a System Administrator.
3. Select **Install for Admins Only** on the installation page and click **Install**. This ensures that only System Administrators are provided access to the package during installation. You will be able to provide access to additional users in a later step.



4. Click **Done** once installation is complete. You are redirected to the Installed Packages page. The package now appears in the list of installed packages in your org.



Configuration

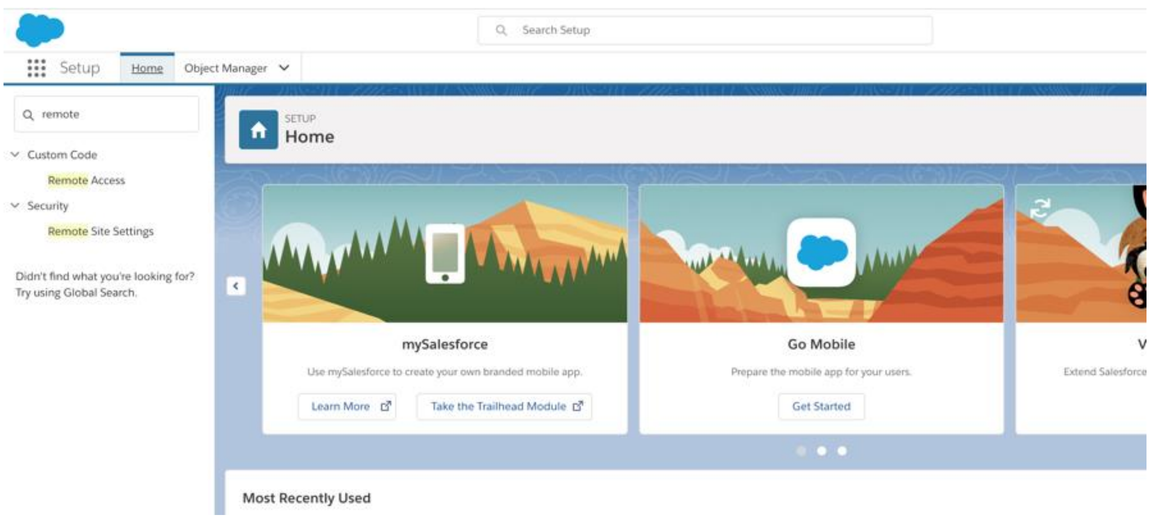
Remote Site Settings

Remote site settings specify a list of endpoints that are trusted by your organization.

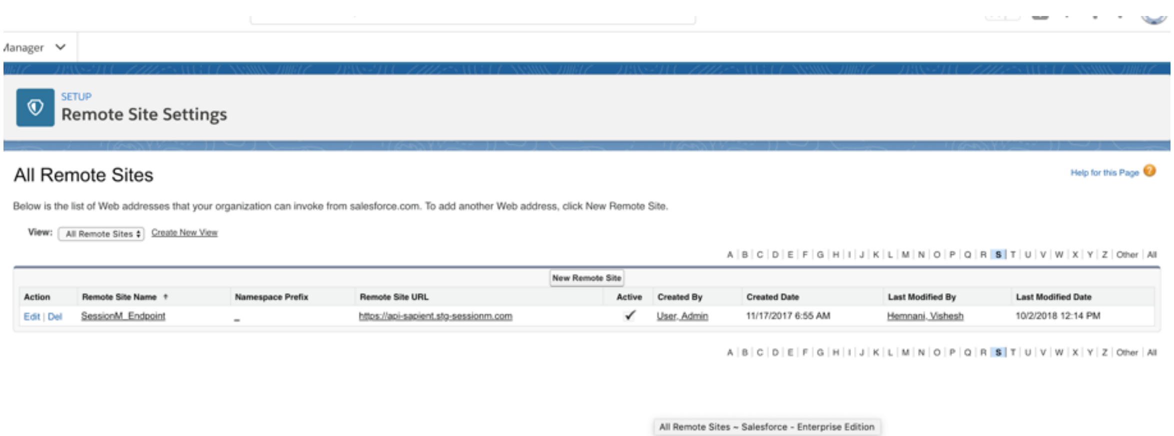
Contact your SessionM Integration Engineer or Project Manager to ensure you have the correct endpoints for Users API and Incentives/Offers API.

To configure the remote site settings:

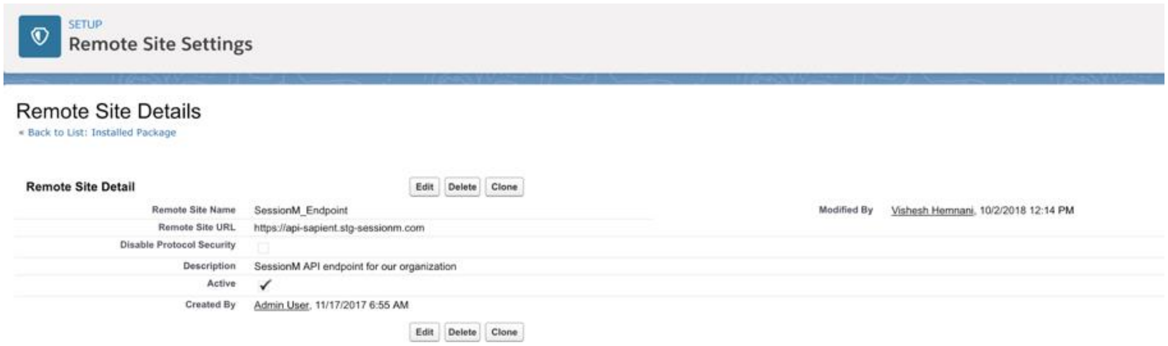
1. Go to **Setup**.
2. Go to the **Quick Find** box and search for "remote". Select **Remote Site Settings**.



3. Click **New Remote Site** to add a new endpoint for Users API.



4. Provide the **Name**, **URL** and **Description** for the new endpoint and click **Save.**

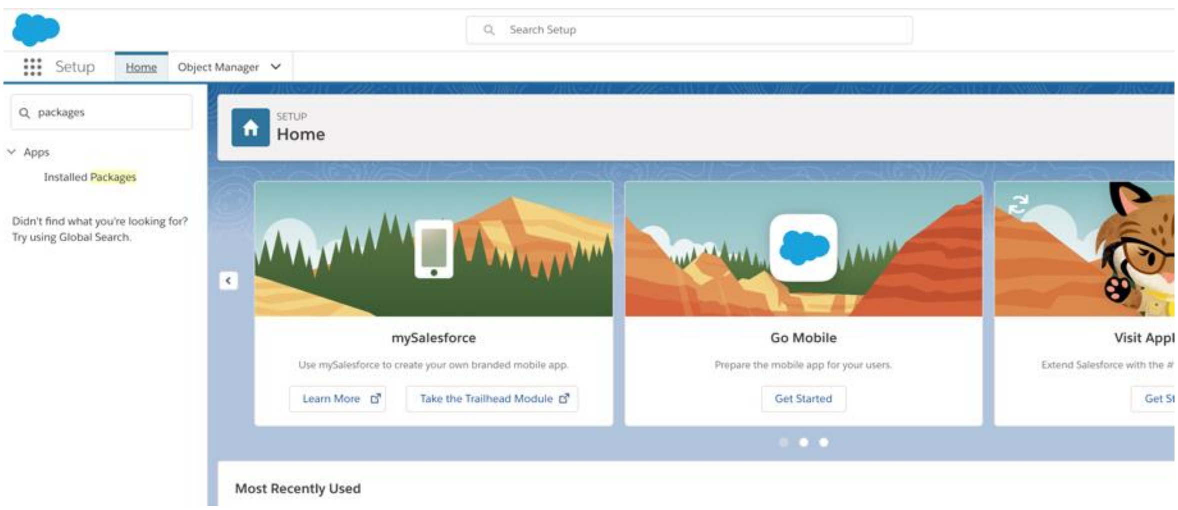


5. Repeat steps 3 and 4 to add the endpoint for Incentives/Offers API.

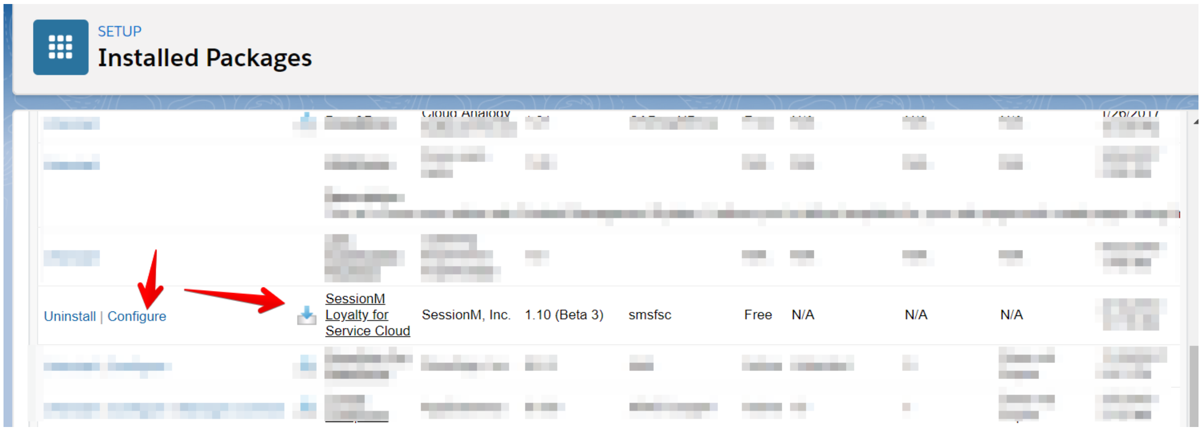
Custom Package Settings

Use the custom SessionM Loyalty configuration page to add SessionM API credentials and configure the package for your org.

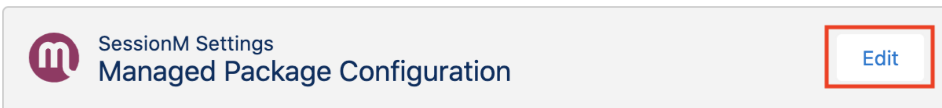
1. Go to **Setup**.
2. Go to the **Quick Find** box and search for "packages". Select **Installed Packages**.



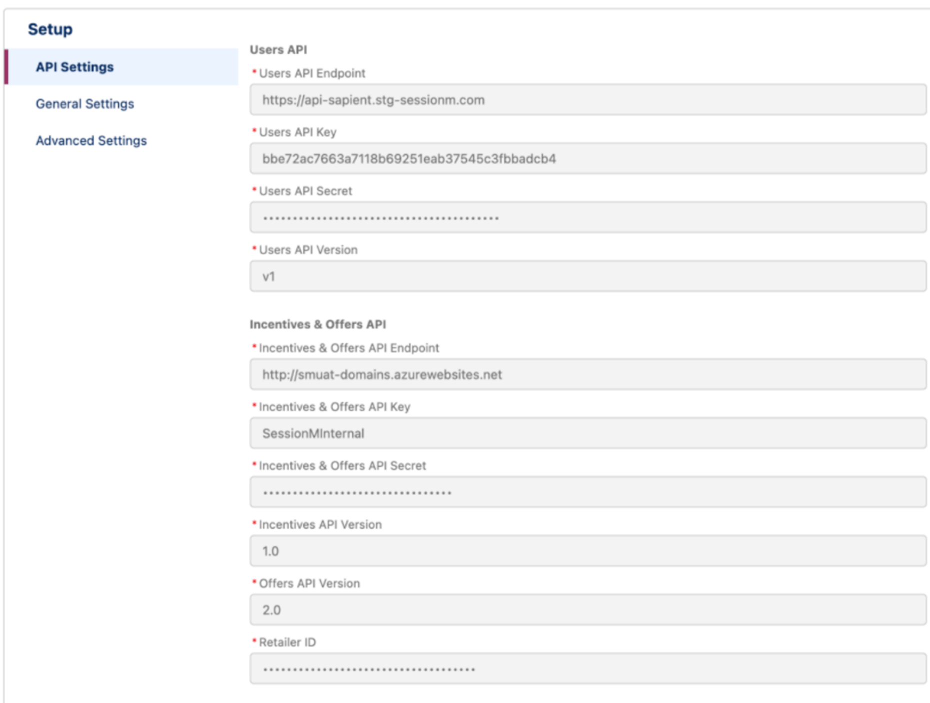
3. Click the **Configure** link next to the SessionM Loyalty package.



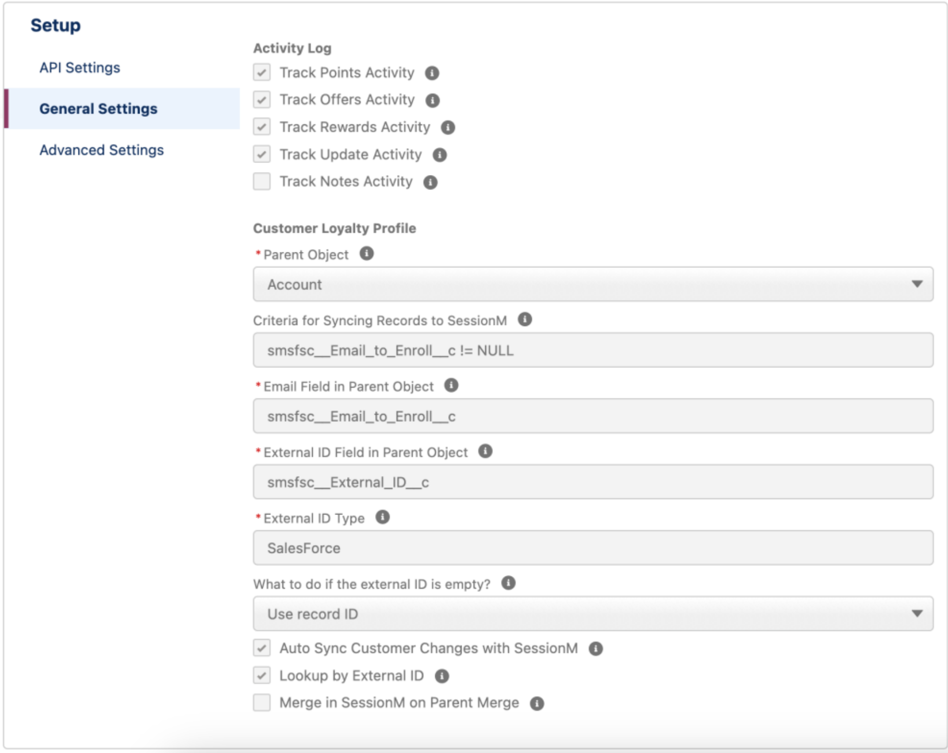
4. Click **Edit** on the configuration page.



5. In the API Settings section, update the API endpoint settings provided by your SessionM Integration Engineer or Project Manager.



6. In the General Settings section, update the values following the guidelines below:



a. **Activity Log**: Enable logging of Salesforce user activity based on what SessionM-related actions they take within the package. These logs can be used for auditing purposes.

b. **Parent Object**: Select the Salesforce object where the main customer data is stored (also known as the parent object). Supported objects: Account or Contact.

c. **Criteria for Syncing Records to SessionM**: Custom criteria for the selected parent object to sync *new* customers from Salesforce to SessionM. The formula should follow the SOQL syntax after the WHERE clause.

d. **Email Field in Parent Object**: Enter the parent object's field (API name) storing the customer's email address. For example, if you are using Person Accounts, this field can be **PersonEmail**. Custom fields are also supported.

e. **External ID Field in Parent Object**: Enter the parent object's field (API name) storing the customer's external ID. For example, if Commerce Cloud is the primary source of customer data, you can use the Commerce Cloud user ID.

f. **External ID Type**: Enter the keyword used to associate the external ID with its source on the SessionM Platform.

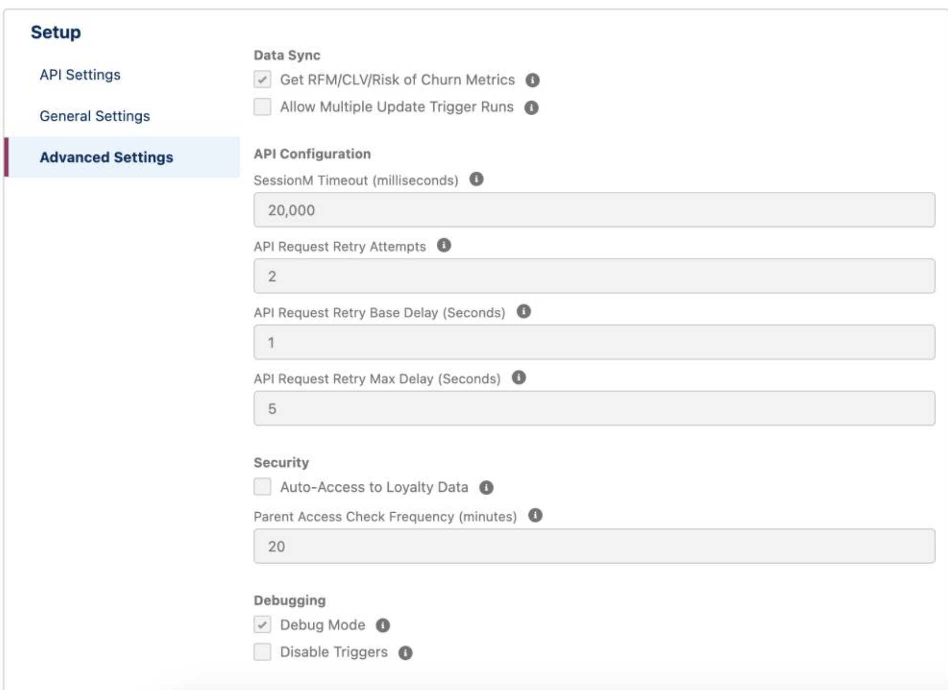
g. **What to do if the external ID is empty?** Choose how to handle the SessionM customer records when the external ID is empty on the parent record. The options are to use the parent record ID (default) or to log an error and prevent enrollment into the SessionM Platform.

h. **Auto Sync Customer Changes with SessionM**: Enable to automatically sync customers from Salesforce to the SessionM Platform.

i. **Lookup by External ID**: Enable to look up customers in the SessionM Platform by their external ID (applicable to Customer Merge, Incentives, and Offers APIs). This is recommended if 1) the customers have only one external ID that never changes; or 2) Salesforce is not the primary source of customer data; or 3) the customer data is imported from a third party service.

j. **Merge in SessionM on Parent Merge**: Automatically merge customers in SessionM when the corresponding parent records are merged in Salesforce. The customer survivorship in SessionM is determined based on the email or external ID (depending on the setting selected for **Lookup by External ID** at point i.) saved on the survivor parent record after the merge.

7. In the Advanced Settings section, update the values following the guidelines below:



a. **Get RFM/CLV/Risk of Churn Metrics**: Enable to import RFM metrics, Customer Lifetime Value, and Probability for Churn from the SessionM Platform.

b. **Allow Multiple Update Trigger Runs**: Enable to allow the process to evaluate a record multiple times before syncing with SessionM. This setting is for orgs where the existing customization updates the parent record multiple times in one transaction. !!! Enabling this will increase the number of trigger executions and might impact the org's resources.

c. **SessionM Timeout**: Set a timeout (in milliseconds) for SessionM API callouts. Between 1 and 120,000.

d. **API Request Retry Attempts**: The maximum number of retries to call SessionM APIs before logging an error. Read more about the API Retry Mechanism.

e. **API Request Retry Base Delay**: The base delay interval (in seconds) for retrying failed API calls to the SessionM Platform. Read more about the API Retry Mechanism.

f. **API Request Retry Max Delay**: The maximum delay (in seconds) between two retries to call SessionM APIs. Read more about the API Retry Mechanism.

g. **Auto-Access to Loyalty Data**: Enable to sync record sharing between SessionM Customer and the related parent records. Read more in the User Record Access section.

h. **Parent Access Check Frequency**: Set the frequency (in minutes) at which to check and sync record sharing between SessionM Customer and the related parent records. Set only if Auto-Access to Loyalty Data is enabled.

i. **Debug Mode**: Enable to use the SessionM Loyalty package custom error logging service, used to collect more information than the standard debug logs offer when an error occurs. Recommended during testing in sandbox orgs.

j. **Disable Triggers**. Disables all the triggers in the smsfsc namespace. Enabling this stops the data flow to SMP, please use only for debugging purposes.

8. Click **Save** to save the configuration.

Salesforce to SessionM Field Mapping

You can choose what data to sync between the two platforms by configuring the field mapping in the custom metadata type **SessionM Field Mappings**:

- **SessionM to Salesforce API Mapping** is necessary for any type of data exchange between the two platforms. It maps the joint SessionM Customer object fields to API attributes
- **Account to SM Customer Mapping** or **Contact to SM Customer Mapping** (depending on the object type selected for the **Parent Object** dropdown during the configuration) is optional and can be used to enable the data to flow directly from parent updates. It maps parent object fields to API attributes.

The mapping is stored as JSON strings. Example:

```
{
  "SmToSfFieldMappings": {
    "Mappings": [
      {
        "smApiName": "external_id",
        "sfApiName": "smsfsc__ExternalID__c",
        "attributeType": "standard"
      },
      {
        "smApiName": "birthday",
        "sfApiName": "smsfsc__CustomDate1__c",
        "attributeType": "custom"
      }
    ]
  }
}
```

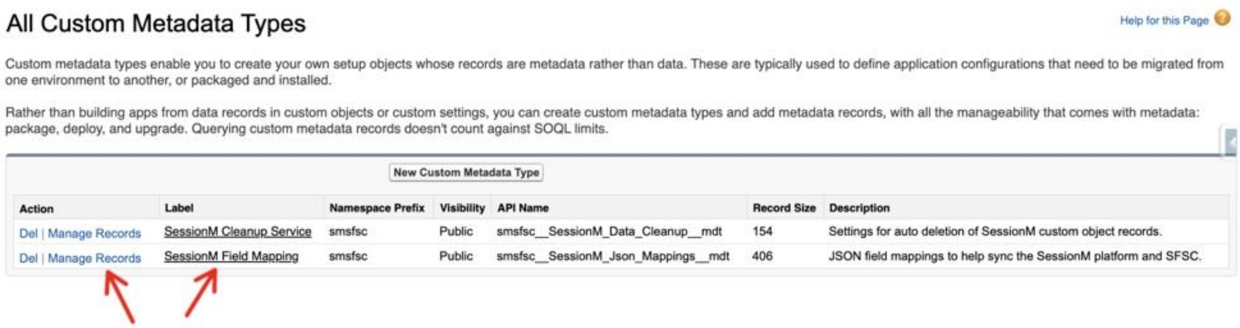
This object contains an array of “Mapping” objects. To add a new mapping, you must specify the following three attributes:

1. **smApiName**: Provide the name of the field as it appears in the response received from SessionM API.
2. **sfApiName**: Provide the API name of the field in SessionM Customer object to which the API field should be mapped. Ensure that the data type between the source and target field is compatible.
3. **attributeType**: This can be:
    a. *standard* → to map a standard attribute from SessionM Users API
    b. *custom* → to map a custom attribute from the SessionM Users API
    c. *customer_scores* → to map a CLV attribute from the SessionM Users API

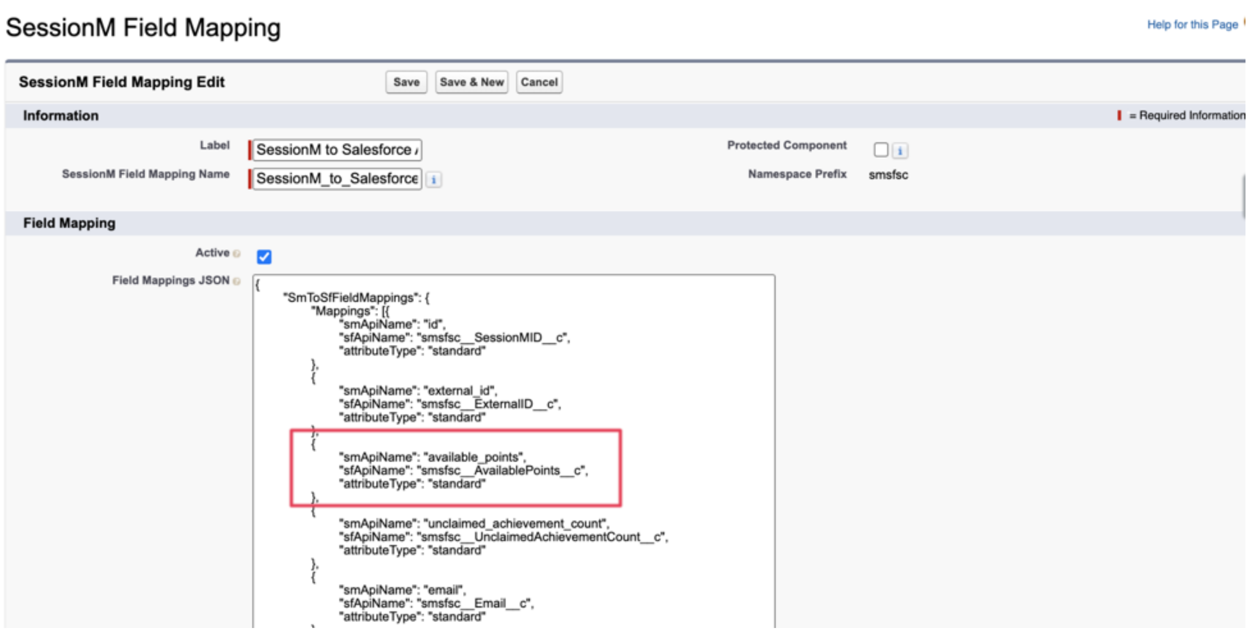
To add field mapping:

1. Go to **Setup**.
2. Go to the **Quick Find** box and search for “metadata”. Select **Custom Metadata Types**.

3. Click **Manage Records** next to **SessionM Field Mappings.**



4. Select **SessionM to Salesforce API Mapping** and click **Edit.**



5. Click **Save**.

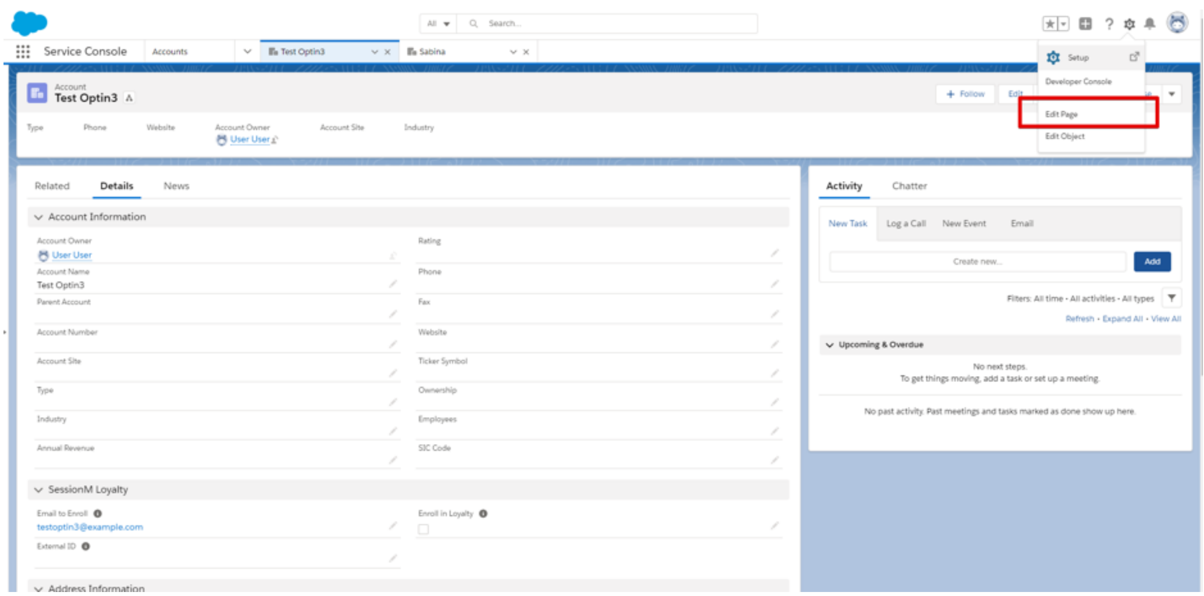
Customizing the User Interface

Add SessionM Loyalty Components to Lightning Record Pages

Use the SessionM components on parent record pages (Account or Contact, as selected in Custom Package Settings) to create a unified, loyalty focused customer profile.

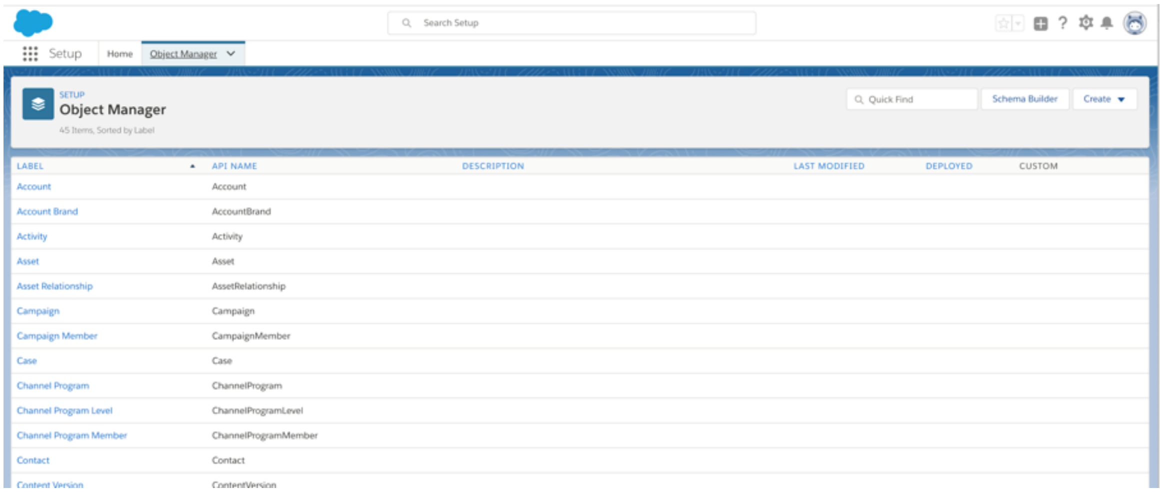
The following is a step-by-step guide on how to add SessionM Loyalty components to a Lightning Record Page for Account records. The same steps can be followed to customize Contact record pages:

1. If you are already viewing an Account record page, click and then **Edit Page**. Continue with step 10.

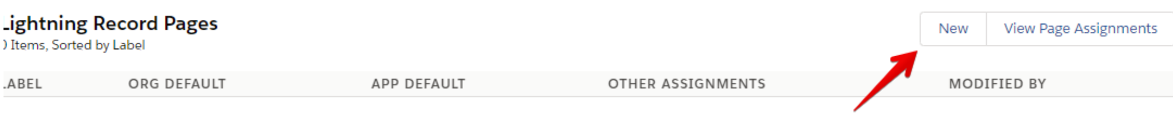
   Otherwise go to **Setup**.

2. Click the **Object Manager** tab and select **Account**.

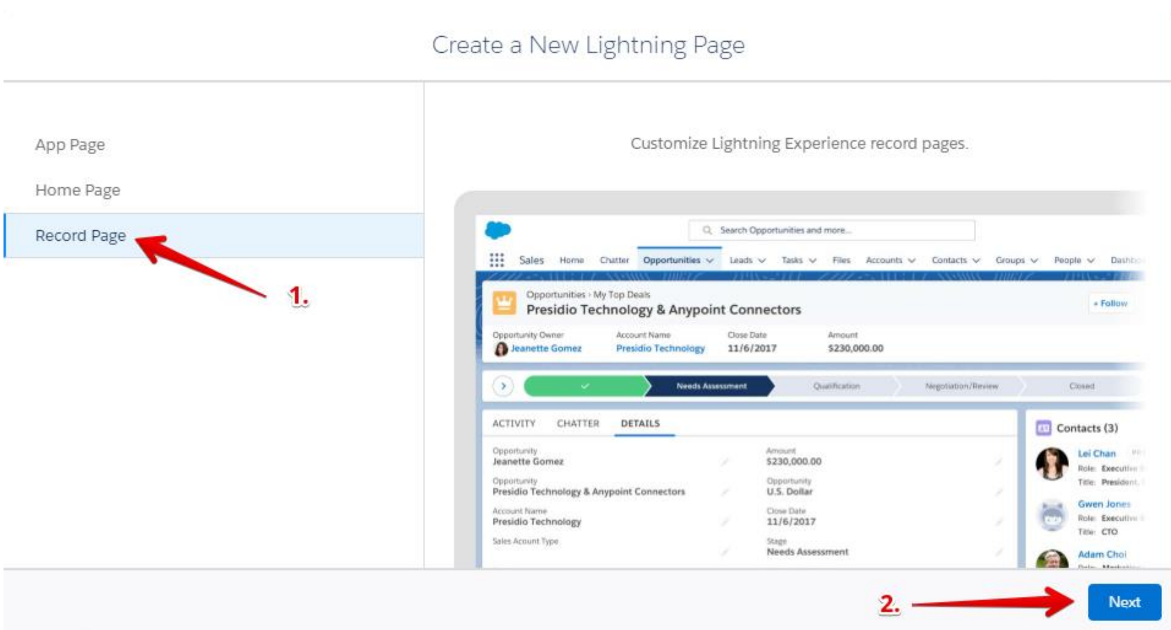


3. Click **Lightning Record Pages**.
4. If the Lightning Record Page exists, continue with step 8.

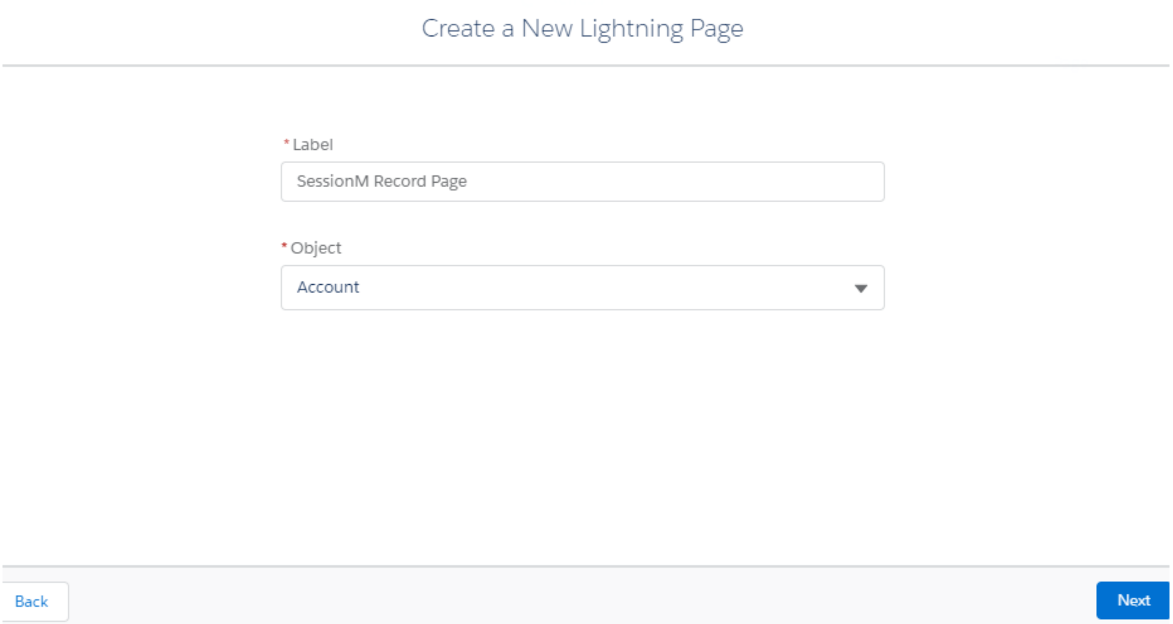
   Otherwise, if the Lightning Record Page for the account does not exist, click **New**.



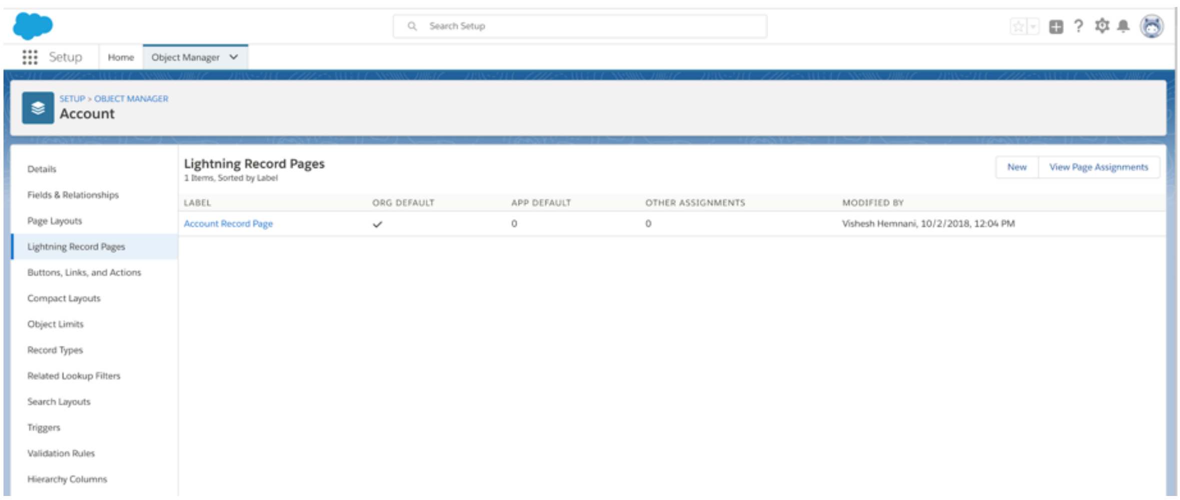
5. Click **Record Page** and then click **Next**.



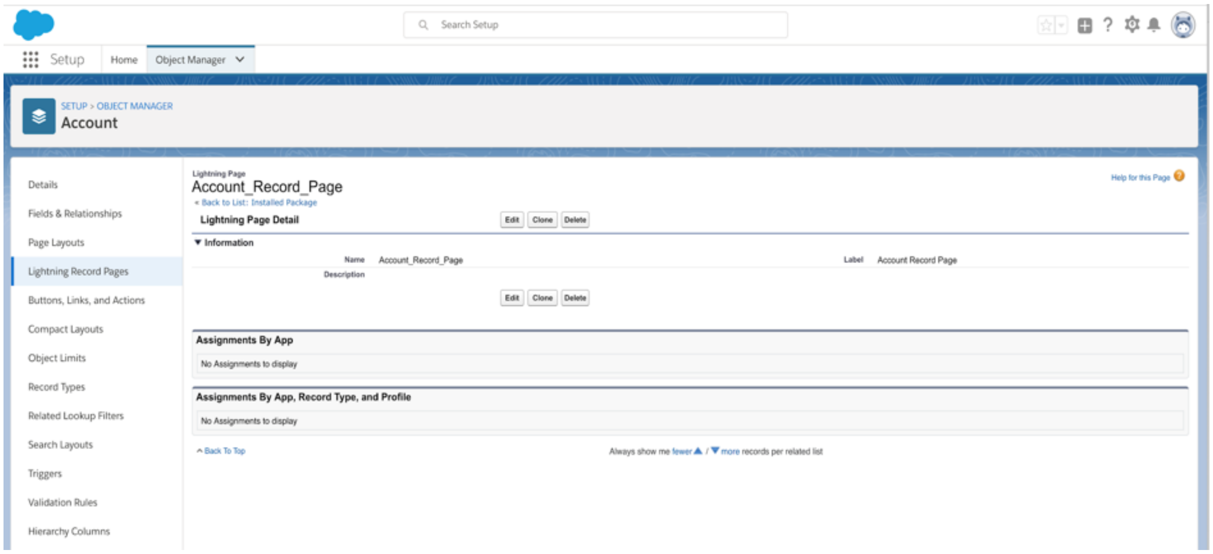
6. Type in a label and Account. Click **Next**.



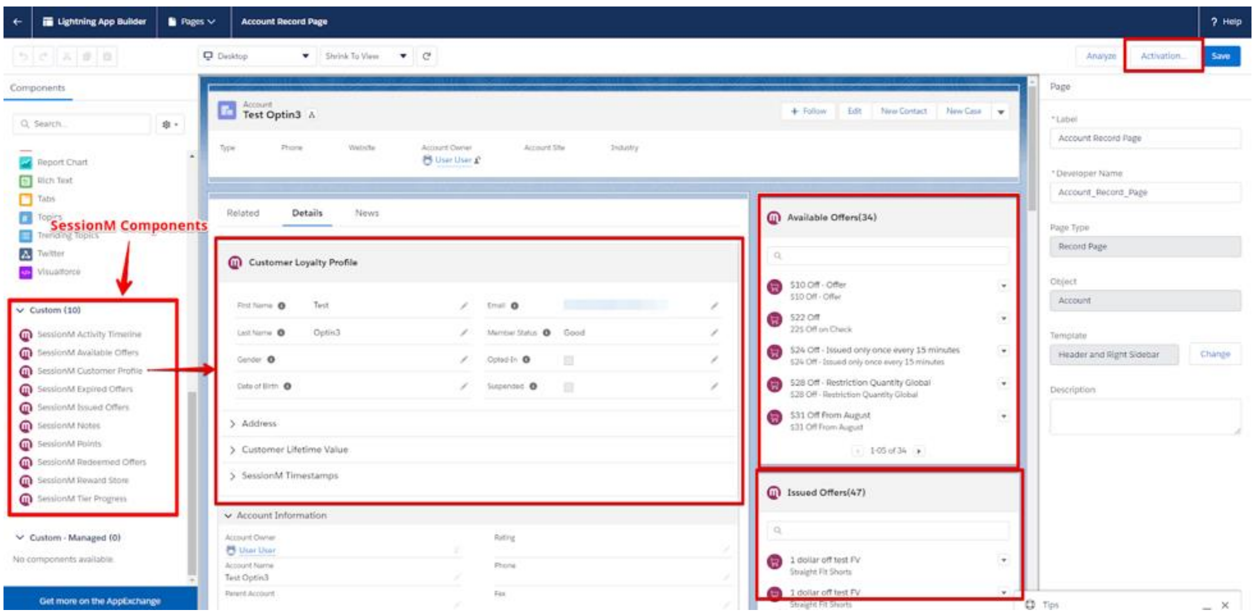
7. Select a template and click **Finish**.
8. Click the Account Lightning Record Page to which you want to add SessionM components.



9. Click **Edit** to open the record page for editing in Lightning App Builder.

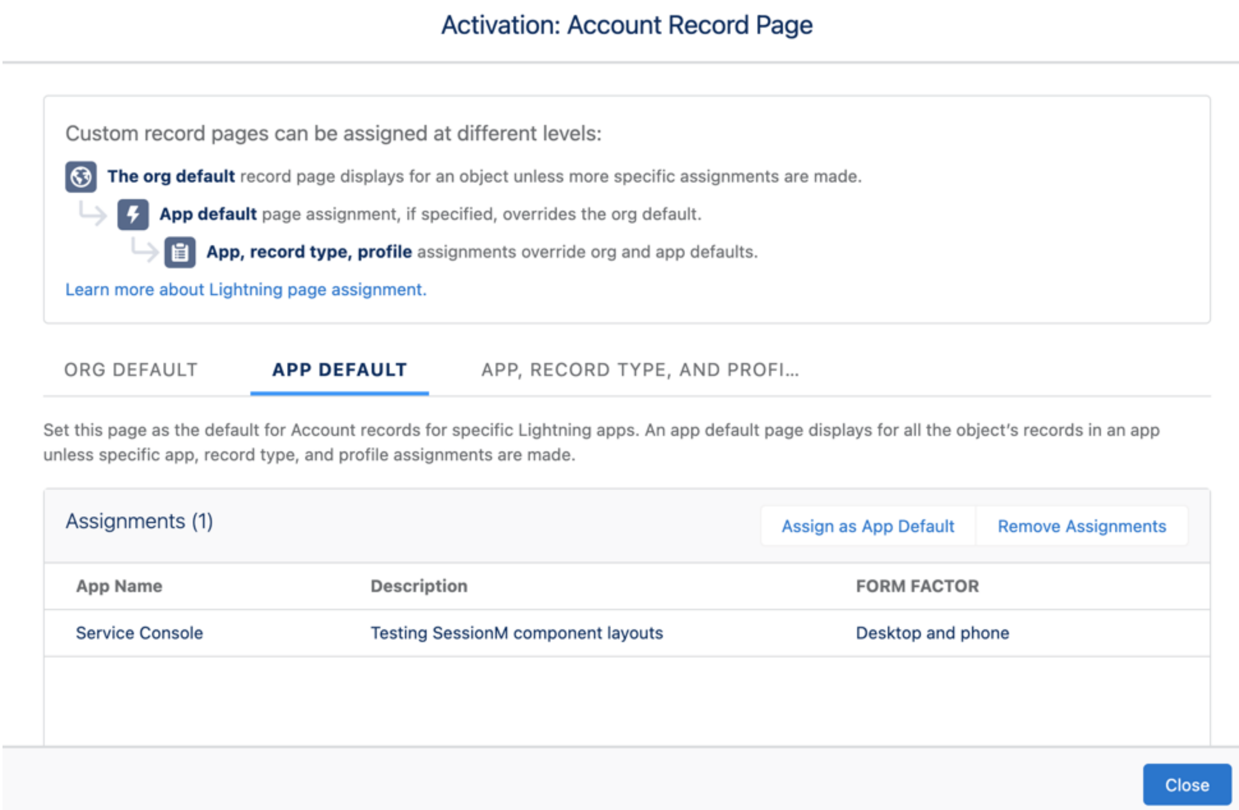


10. Drag and drop **SessionM** components anywhere on your page as needed.

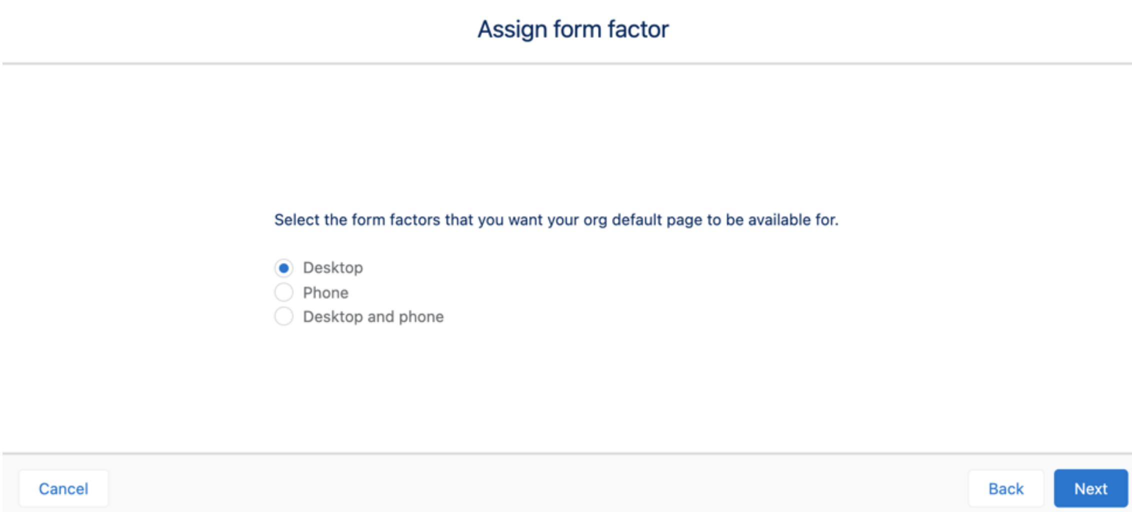


11. Click the Activation button in the top right corner.

12. Choose whether to make this page as org default for all Account pages in the org, or activate it only for one app, or for a combination of app + record type + user profile (for example, you can set this page to display only for Person Accounts when viewed by service agents in the Service Console).



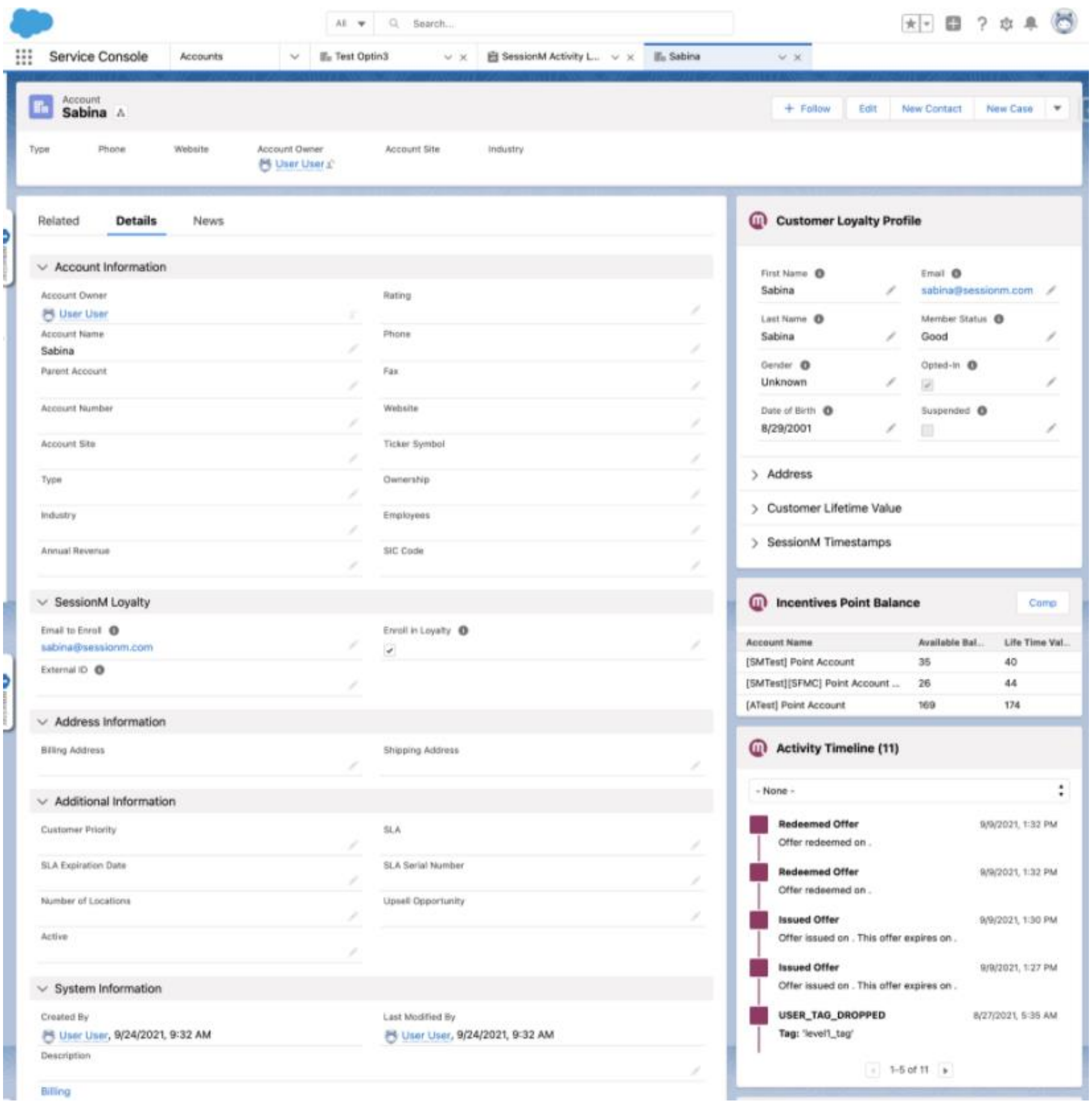
13. Choose the form factors and click **Next**.



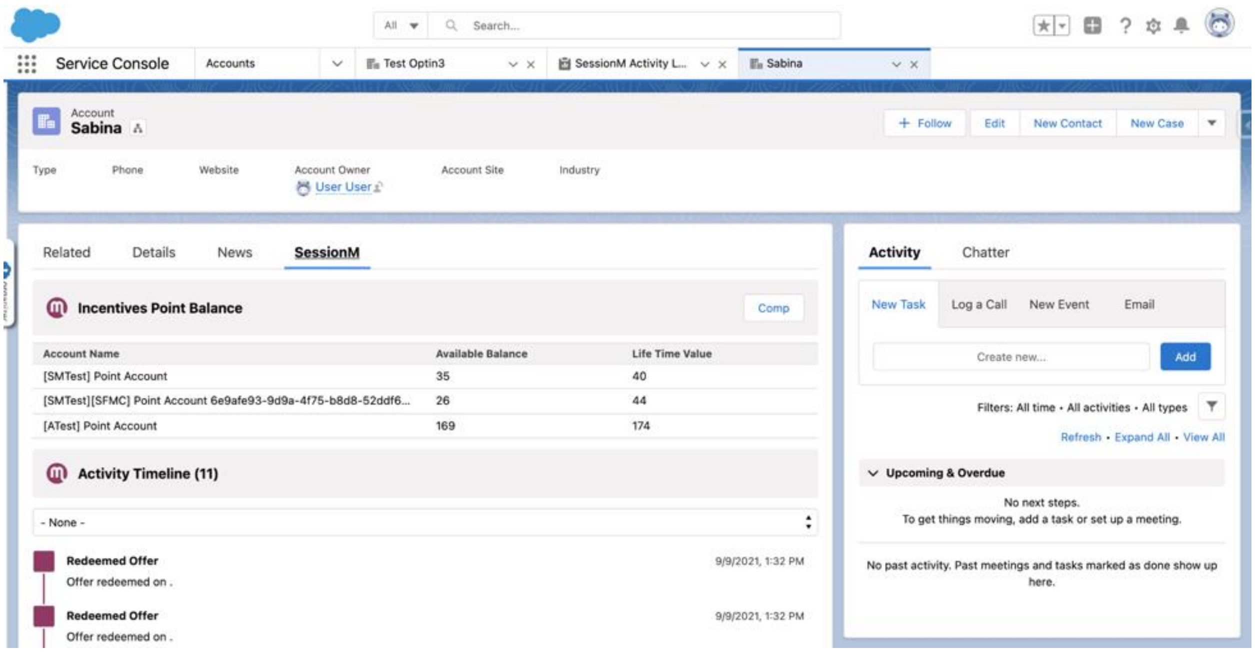
14. Click **Save** to save the page. Then click **Back** to exit.

Lightning Experience Layout Examples

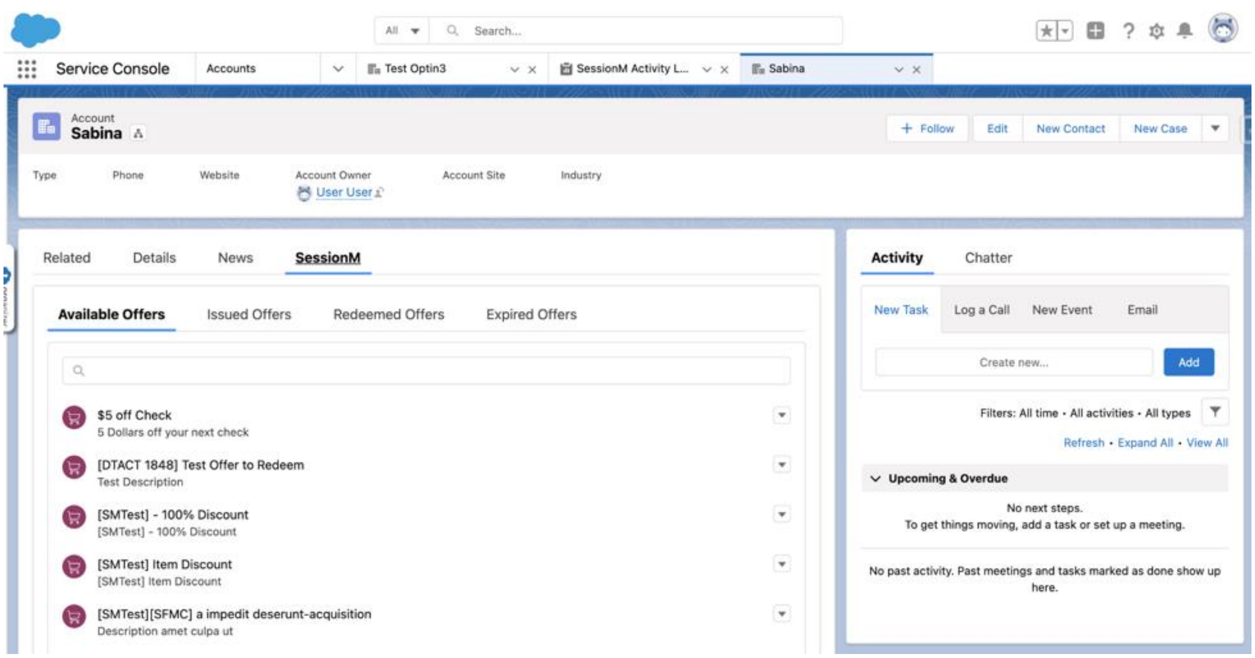
Besides record details: simply drag and drop individual SessionM components onto the sidebar.



Within a tab on the main page area: add a new tab to the Tabs component and drag and drop individual SessionM components under the new tab.

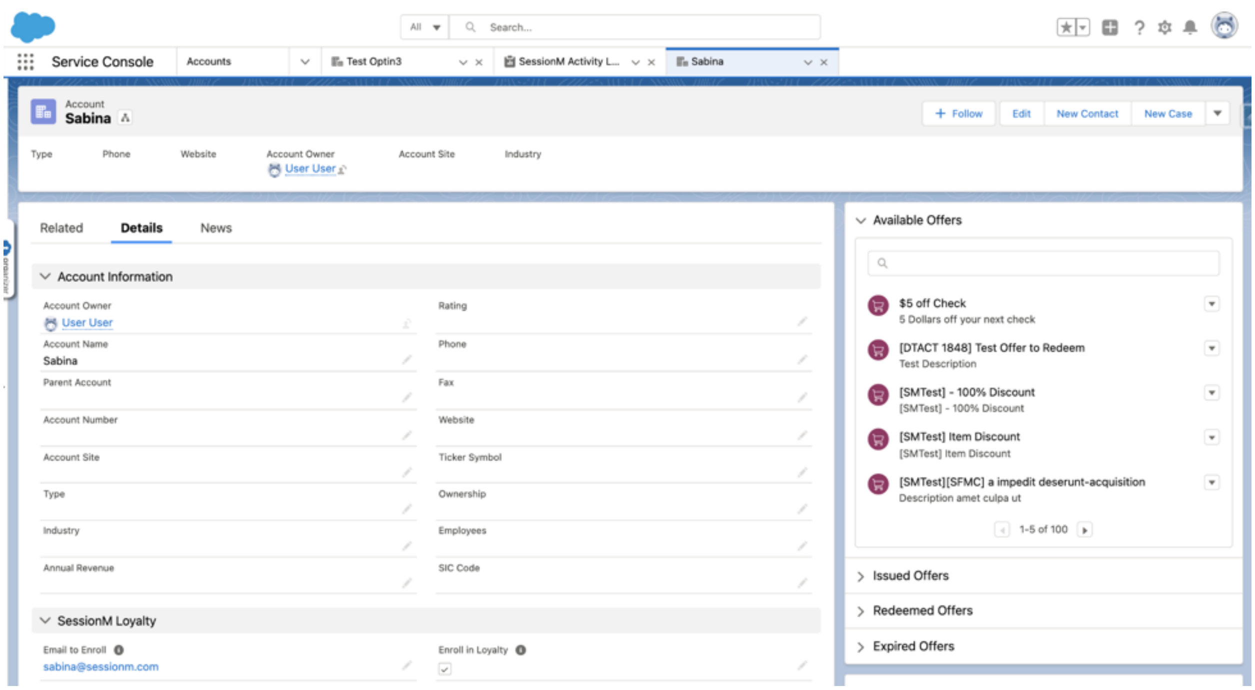


The components can be **grouped in tabs**. Drag and drop a Tabs component onto the page, define its tabs, then drag and drop the components under the tabs.

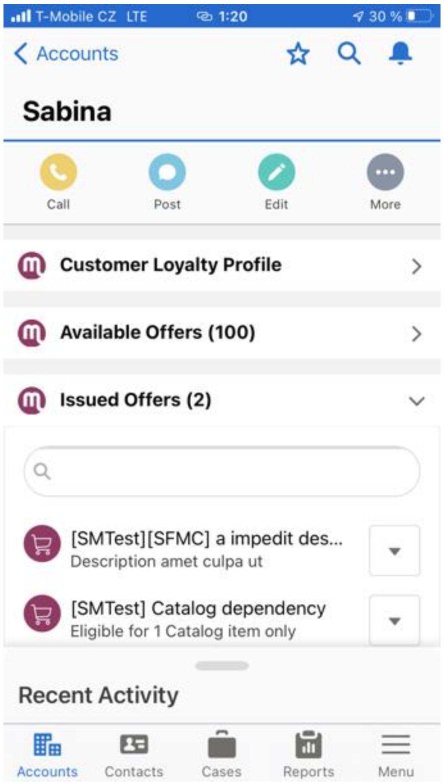


The components can be **grouped in accordion sections**. Drag and drop an Accordion component onto the page, define its sections, then drag and drop the components under the section headers.

Each component has a **Show Header** flag that can be disabled to hide the title header when the container section already has a title.



On **mobile devices**, the SessionM components are displayed as expandable sections.

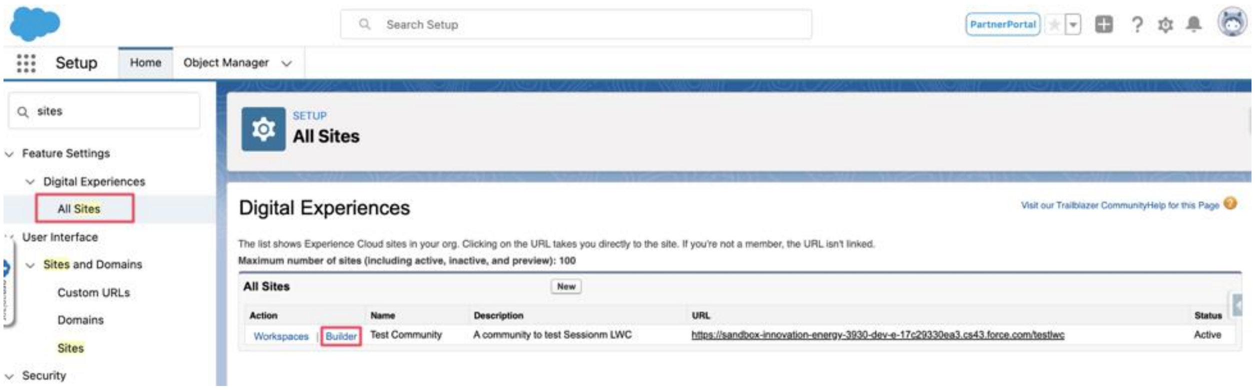


Add SessionM Loyalty Components to Experience Cloud Pages

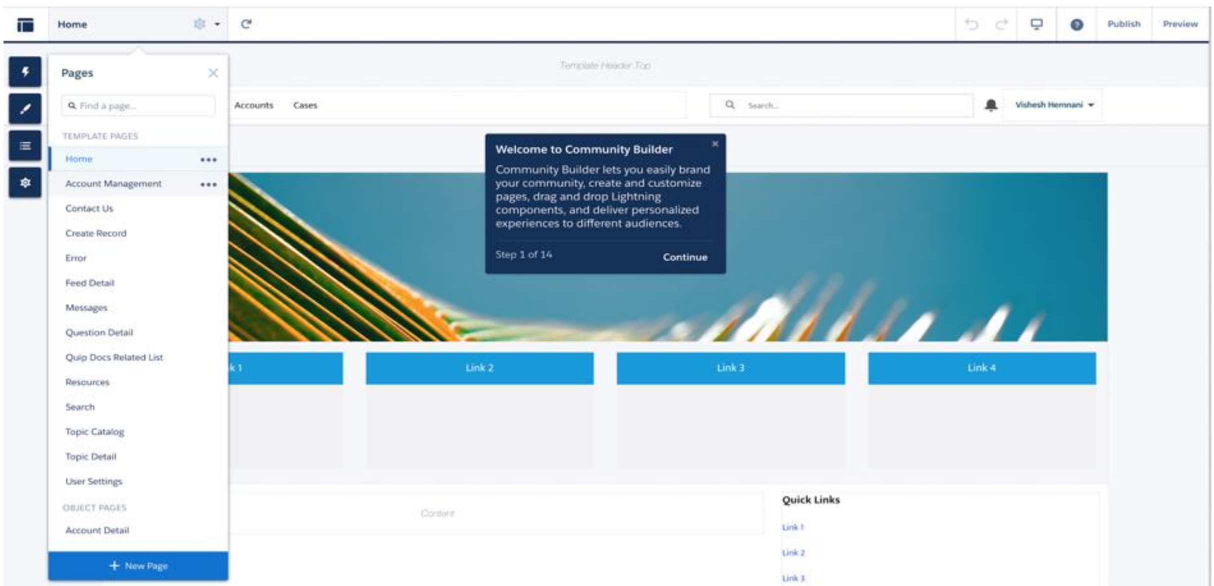
The SessionM components can be added to Experience Cloud (formerly known as Community Cloud) pages to be accessed by external and guest users.

The following is a step-by-step guide on how to add SessionM Loyalty components to an Experience Cloud Page for Account records. The same steps can be followed to customize Contact record pages:

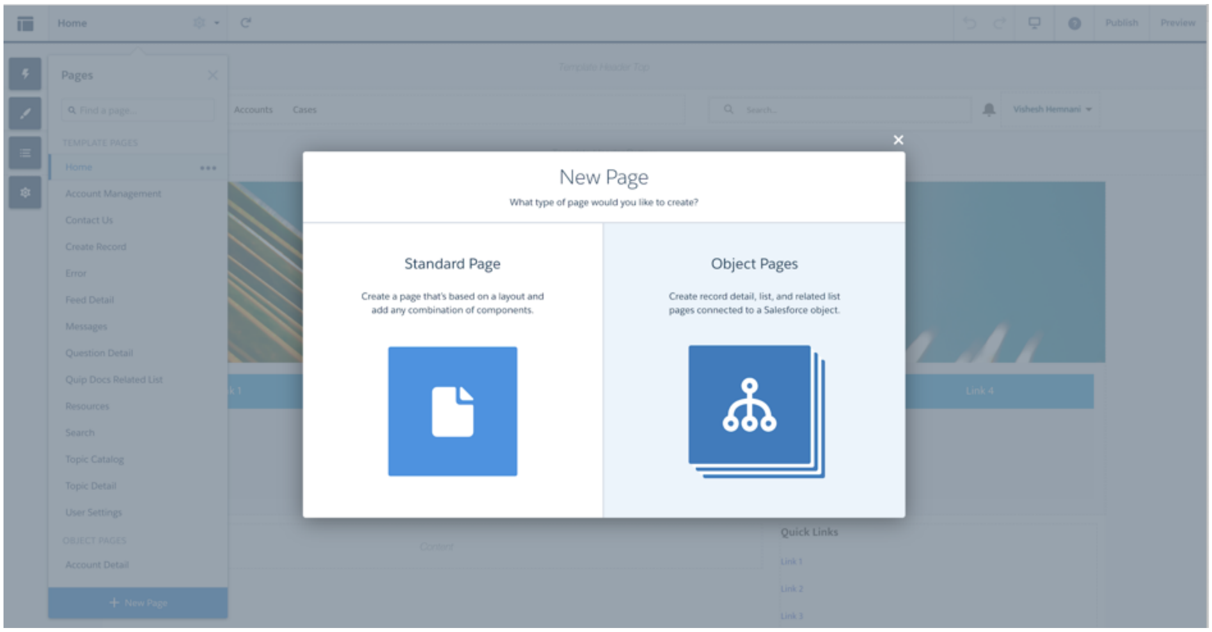
1. Go to Setup.
2. Go to the **Quick Find** box and search for "sites". Select **All Sites** under **Digital Experiences**. Finally, click the **Builder** link next to the site that you want to edit.



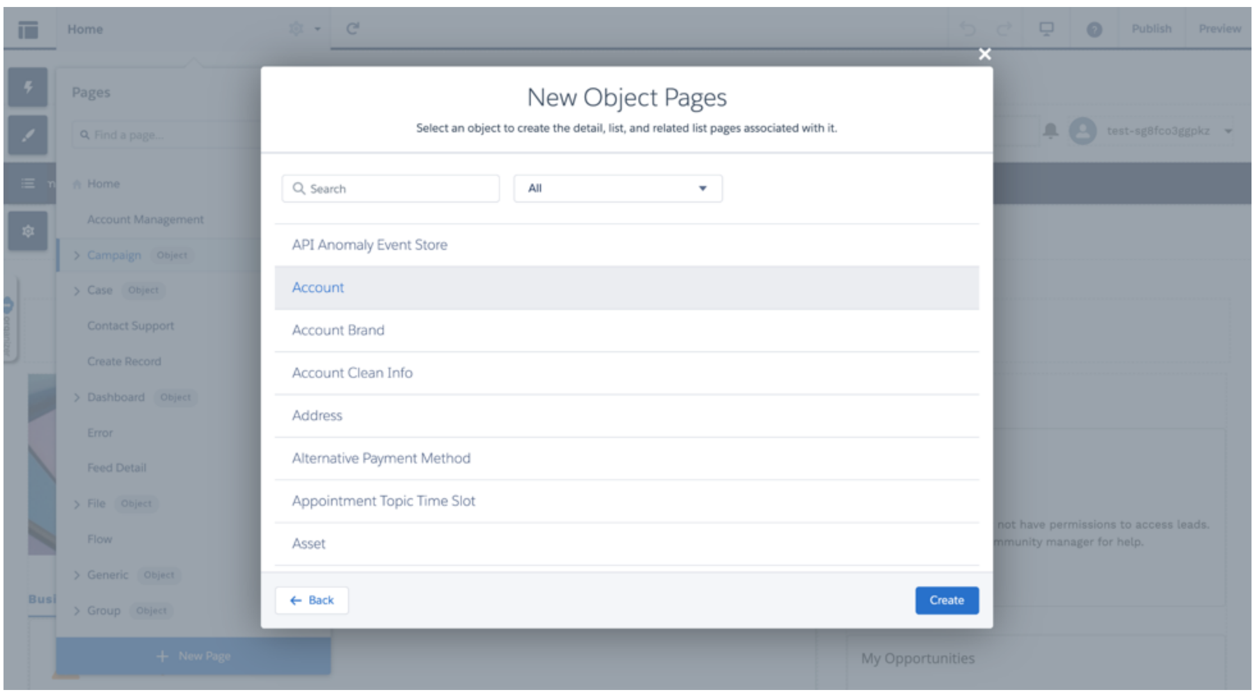
3. Click **Pages Menu**. Then click **New Page** if you need to create a new page for Account in Experience Cloud. Otherwise, skip to step 6.



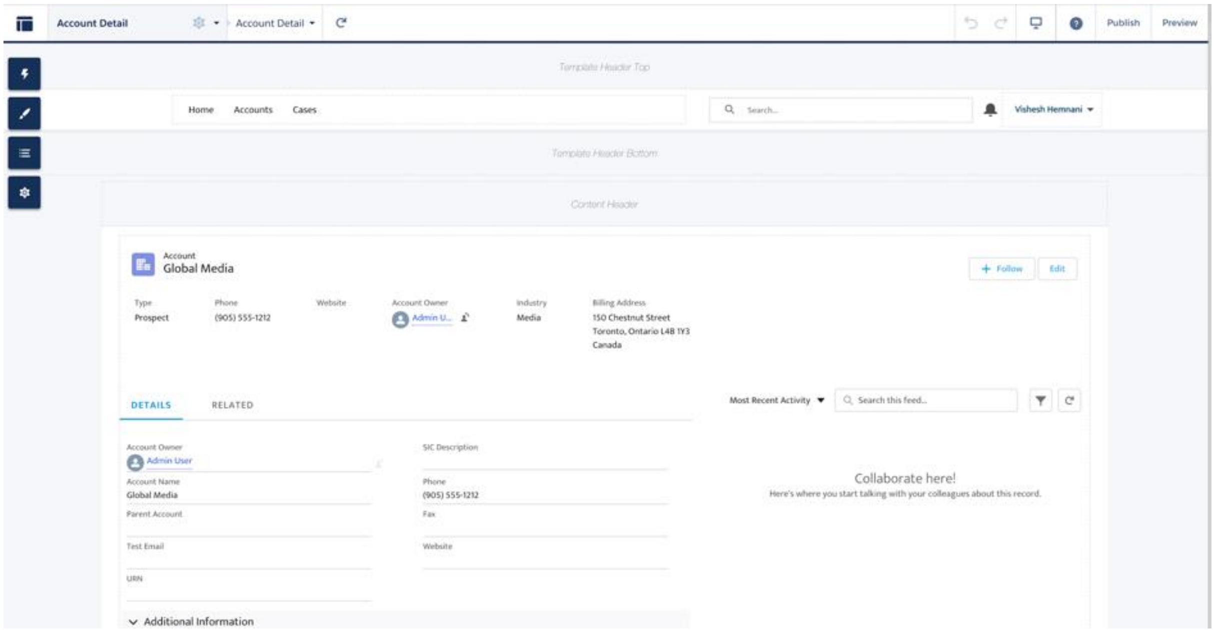
4. Select **Object Pages**.



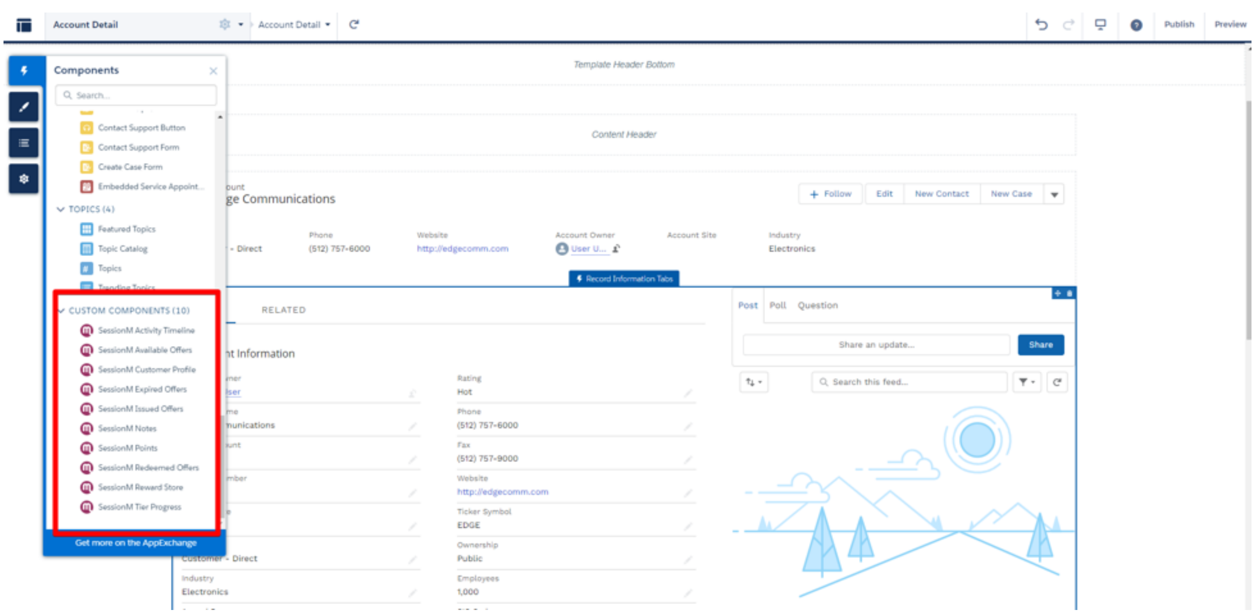
5. Select **Account**.



6. Click **Pages Menu**, then click **Account Detail**.



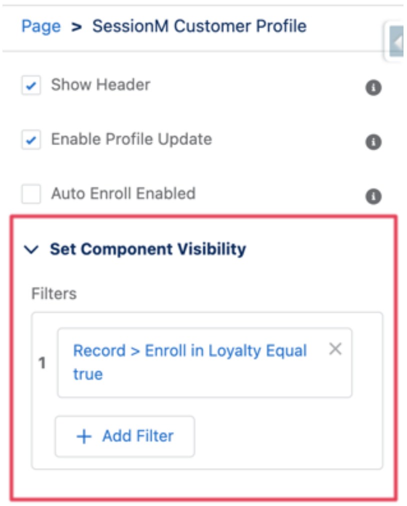
7. Click the **Components** menu. Then drag and drop SessionM components onto the page in the same way as described in the Adding SessionM Components to Lightning Record Pages section.



8. Click **Publish** to publish your changes.

Configure SessionM Loyalty Lightning Web Components

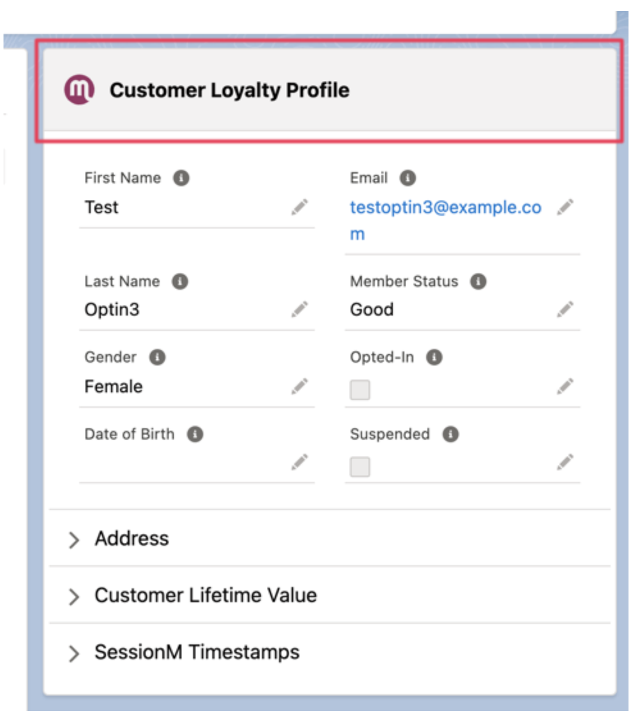
You can control when a component appears on a Lightning page by adding filter conditions and logic to its properties, such as parent record field values, current user or device.



Each SessionM component has its own set of custom properties, as follows:

SessionM Customer Profile

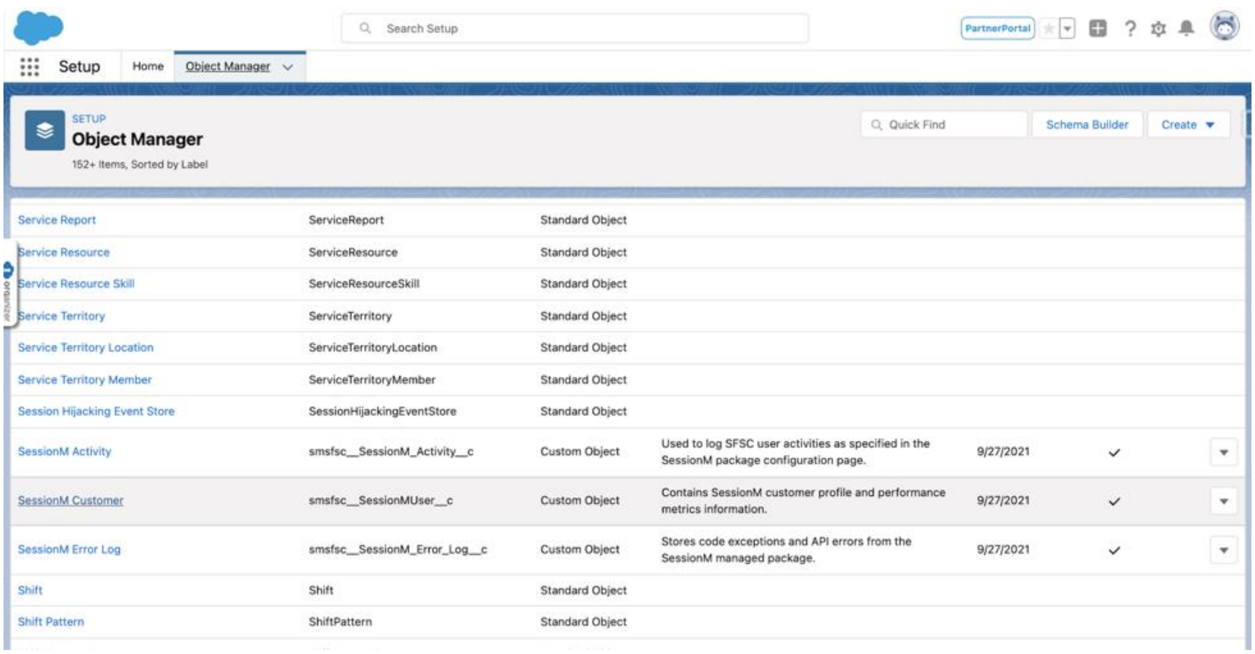
- **Show Header**: Shows the title bar on top for desktop view and as a stacked section's header for mobile view. Disabling the header is recommended when the component is placed under a tab or accordion section with the same name.



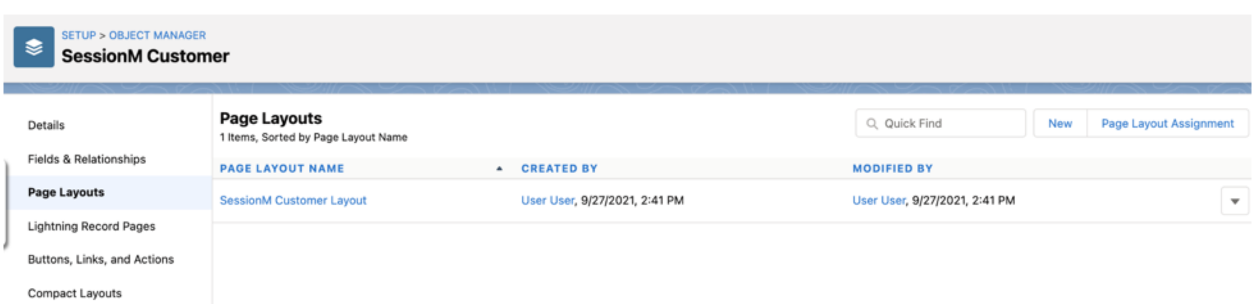
- **Enable Profile Update**: Allows users with SessionM Update permission to update customer profiles in the SessionM Platform directly from this component.
- **Auto Sync from SessionM Loyalty**: Automatically sync the latest customer changes from the SessionM Platform to Salesforce on component load.
- **Component Load Delay (ms)**: Used when *Auto Sync from SessionM Loyalty* is enabled. Sets the number of milliseconds before component loading to allow API calls to be processed. Recommended at least 3000ms when the component is on the record landing page.

You can control which sections and fields appear in the Customer Profile component by editing the page layout for the **SessionM Customer** object:

1. Go to Setup.
2. Click the **Object Manager** tab and select **SessionM Customer**.



3. Click **Page Layouts**. Then select **SessionM Customer Layout**.



4. Modify the page layout as needed. Then click **Save** to save and exit.

SessionM Activity Timeline

- **Timeline Item Width**: In case the HTML/CSS timeline layout in the SessionM Platform is very wide (e.g. a detailed transaction table), the styling can break when the component is added to a narrower page slot (e.g. in the sidebar). Use this field to set a larger width in the component; a horizontal scrollbar will then display for each item.
- **Number of Timeline Items**: The number of timeline entries to be fetched from the API. This is especially useful when the timeline templates in SessionM are heavier and loading a high number of items can hit the Exceeded max size limit in Salesforce.

SessionM Notes

- **Number of Notes per Page:** The number of notes to be displayed at once in the component.
- **Enable adding notes**: Allows users with SessionM Add Notes permission to add notes to customer profiles in the SessionM Platform directly from this component.
- **Admin Id**: The ID of the SessionM Platform admin user who will be displayed as author of these notes when they are viewed in the SessionM Platform.

SessionM Points

- **Enable Point Comp Action**: Allows users with SessionM Comp Points permission to add points to or deduct points from customer point accounts in the SessionM Platform directly from this component.

SessionM Tier Progress

- **Show Header**: Shows the title bar on top for desktop view and as a stacked section's header for mobile view. Disabling the header is recommended when the component is placed under a tab or accordion section with the same name.

SessionM Available Offers

- **Show Header**: Shows the title bar on top for desktop view and as a stacked section's header for mobile view. Disabling the header is recommended when the component is placed under a tab or accordion section with the same name.
- **Enable Offer Issuance**: Allows users with SessionM Manage Offers permission to issue offers to customers in the SessionM Platform directly from this component.

- **Check Purchase Restrictions**: Hides offers that can't be issued to the customer because of inventory or frequency restrictions. Warning – feature in beta: enabling this could impact the performance of the component.
- **Display Fields**: The fields to be displayed in the Offer Details popup when the View button is clicked. Please refer to Appendix A - Offer View Fields for a list of supported offer and user offer fields.
- **Number of Offers per Page**: The number of offers to be displayed at once in the component.

SessionM Issued Offers

- **Show Header**: Shows the title bar on top for desktop view and as a stacked section's header for mobile view. Disabling the header is recommended when the component is placed under a tab or accordion section with the same name.
- **Enable Offer Actions**: Allows users with SessionM Manage Offers permission to redeem or revoke offers for customers in the SessionM Platform directly from this component.
- **Display Fields**: The fields to be displayed in the Offer Details popup when the View button is clicked. Please refer to Appendix A - Offer View Fields for a list of supported offer and user offer fields.
- **Number of Offers per Page**: The number of offers to be displayed at once in the component.

SessionM Redeemed Offers

- **Show Header**: Shows the title bar on top for desktop view and as a stacked section's header for mobile view. Disabling the header is recommended when the component is placed under a tab or accordion section with the same name.
- **Display Fields**: The fields to be displayed in the Offer Details popup when the View button is clicked. Please refer to Appendix A - Offer View Fields for a list of supported offer and user offer fields.
- **Number of Offers per Page**: The number of offers to be displayed at once in the component.

SessionM Expired Offers

- **Show Header**: Shows the title bar on top for desktop view and as a stacked section's header for mobile view. Disabling the header is recommended when the component is placed under a tab or accordion section with the same name.

- **Enable Offer Actions**: Allows users with SessionM Manage Offers permission to issue offers to customers in the SessionM Platform directly from this component.
- **Display Fields**: The fields to be displayed in the Offer Details popup when the View button is clicked. Please refer to Appendix A - Offer View Fields for a list of supported offer and user offer fields.
- **Number of Offers per Page**: The number of offers to be displayed at once in the component.

SessionM Reward Store

- **Show Header**: Shows the title bar on top for desktop view and as a stacked section's header for mobile view. Disabling the header is recommended when the component is placed under a tab or accordion section with the same name.
- **Enable Offer Purchase**: Allows users with SessionM Manage Rewards permission to purchase offers for customers in the SessionM Platform directly from this component.
- **Check Purchase Restrictions**: Hides offers that can't be purchased to the customer because of inventory or frequency restrictions. Warning – feature in beta: enabling this could impact the performance of the component.
- **Display Fields**: The fields to be displayed in the Offer Details popup when the View button is clicked. Please refer to Appendix A - Offer View Fields for a list of supported offer and user offer fields.
- **Number of Offers per Page**: The number of offers to be displayed at once in the component.

SessionM Loyalty Components in Experience Cloud

All the SessionM components have an additional property in Experience Cloud: **Record ID**. Please leave the default value `{!recordId}` for the component to have access to the parent record ID.

Overriding UI Labels and Messages

To override or translate package contents in the SessionM Loyalty package, go to **Setup**, click **Quick Find** and then type "translate", then click **Translate** under **Translation Workbench**. The translatable contents of the package are stored as:

- Field labels and help texts, used in the configuration page and the SessionM Customer Profile component

- Custom labels, used in all other components and error messages

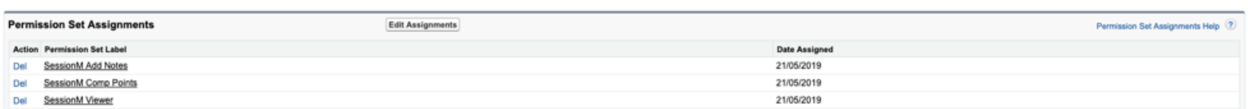
SessionM Security and Sharing

When you installed the SessionM package, only System Administrators were provided access to the application. In this section you learn how to provide SessionM access to additional users in your organization.

SessionM Loyalty includes pre-packaged permission sets, which can be used to quickly provide permissions to your internal and external users.

To see the list of permission sets assigned to a user:

1. Go to ⚙ **Setup**.
2. Click **Quick Find** and search for “users”. Click **Users**.
3. Select the desired username in the list of users.
4. Scroll down to **Permission Set Assignments** on the user page. Example of assignments for a user with access to multiple, but not all, features:



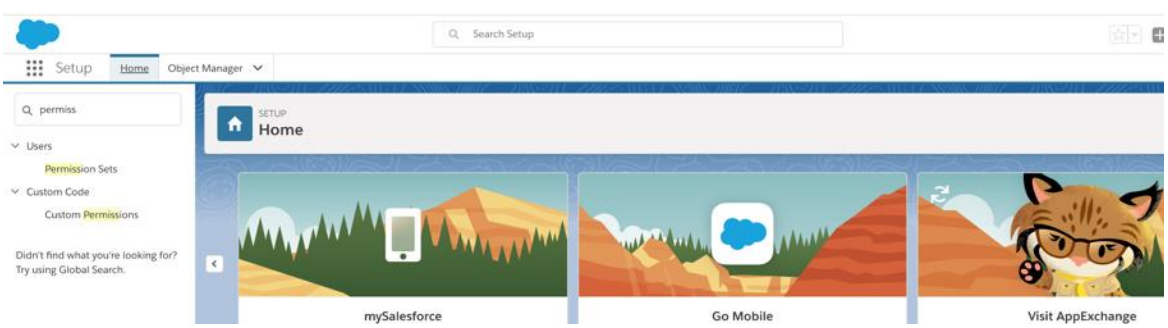
Permission Set Assignments Edit Assignments Permission Set Assignments Help

Action	Permission Set Label	Date Assigned
Del	SessionM Add Notes	21/05/2019
Del	SessionM Comp Points	21/05/2019
Del	SessionM Viewer	21/05/2019

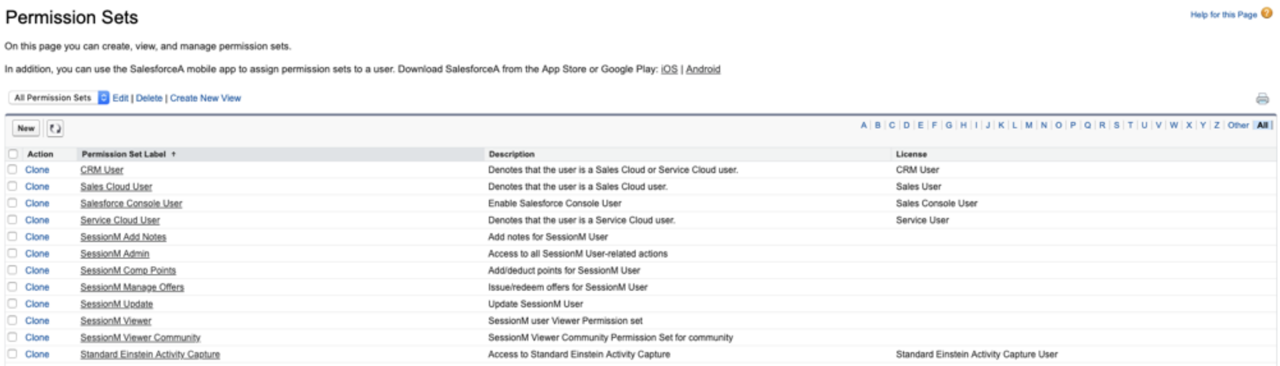
Provide Full-Access Permission to Users

The SessionM Admin permission set provides full access to all SessionM features. This is the recommended permission set for managers or superusers who need to manage all the SessionM Loyalty data.

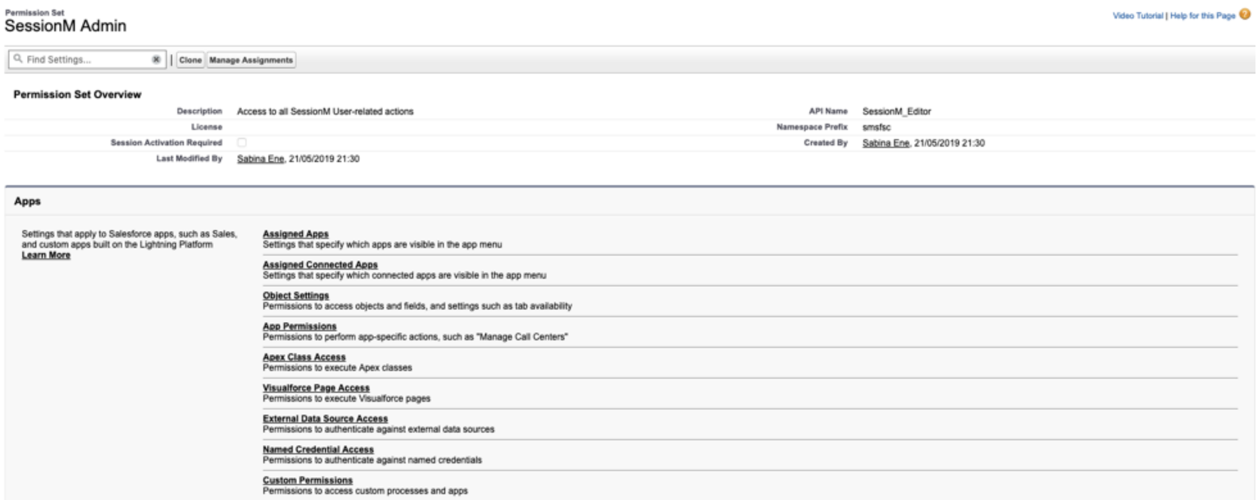
1. Go to ⚙ **Setup**.
2. Click **Quick Find** and search for “permission”. Click **Permission Sets**.



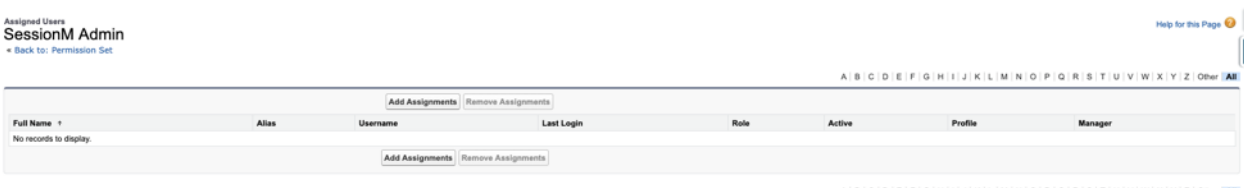
3. Select **SessionM Admin** in the list of permission sets.



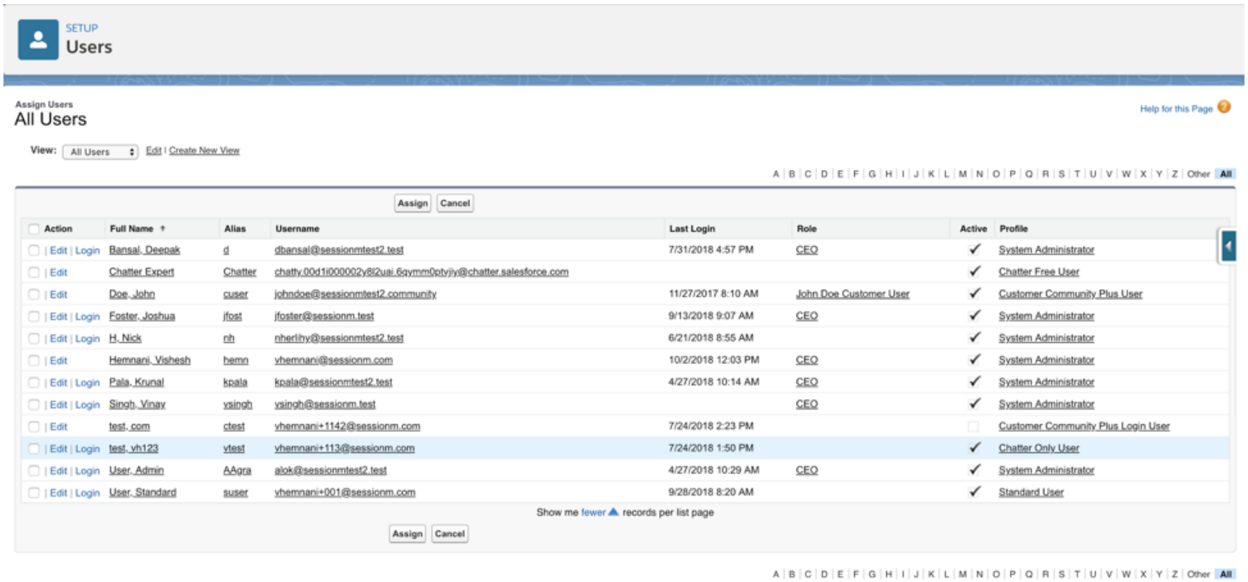
4. Click **Manage Assignments** on the SessionM Admin permission set page.



5. Click **Add Assignments**.



6. Select all the users to whom you want to assign the permission, then click **Assign**.



7. Review the assignment on the next screen and then click **Done**.

Provide Read-Only Permission to Users

The SessionM Viewer permission set provides read-only access to limited SessionM features. This is the recommended permission set for users who only need to view a user's loyalty data. Users with this permission set (and no other SessionM permission set) can view loyalty user information, activity, notes, user offers, reward store, tier progress, and point balance. They cannot edit customer profiles, add notes, manage user offers, or comp points.

To assign the SessionM Viewer permission set to your users, follow the same steps as in the previous section, but choose the SessionM Viewer permission set instead.

Provide Feature Permission to Users

In case a user needs to have access to a limited number of features (for example, they should be able to comp points and add notes, but not to manage offers), SessionM provides feature permission sets to allow for customized access:

- SessionM Comp Points – permission to add and deduct points
- SessionM Add Notes – permission to add notes to the customer profile
- SessionM Manage Offers – permission to issue, redeem, and revoke offers
- SessionM Manage Rewards – permission to purchase offers from the reward store
- SessionM Update – permission to update customer profiles

!!! The SessionM Viewer permission set is required to read loyalty data. Without it, users will not be able to access any SessionM Loyalty components, even if they have feature permissions.

Users with the SessionM Admin permission set automatically have access to all features - SessionM Viewer permission set is needed.

To assign the SessionM feature permission sets to your users, follow the same steps as in the previous section, but choose the feature permission set instead.

User Record Access

The SessionM Customer (smsfsc__SessionMUser__c) object, storing customer profile values from the SessionM platform, has its organization-wide defaults (OWD) set to Private by default. This means Salesforce users without View All permission will not be able to access these records even if they have access to the corresponding parent records (Account/Contact).

We recommend the following setup, depending on the parent object's (Account/Contact) OWD:

- If the parent object's OWD is Public Read-Write, set the SessionM Customer OWD to Public Read-Write. The **Auto-Access to Loyalty Data** flag in the configuration page is irrelevant in this case and can be disabled.
- If the parent object's OWD is Public Read-Only, set the SessionM Customer OWD to Public Read-Only. The **Auto-Access to Loyalty Data** can be enabled to sync edit rights between the parent object and SessionM Customer records.
- If the parent object's OWD is Private, the SessionM Customer OWD can stay Private. The **Auto-Access to Loyalty Data** can be enabled to sync view and edit rights between the parent object and SessionM Customer records.

To view and update OWD:

1. Go to **Setup**.
2. Click **Quick Find** and search for "sharing". Click **Sharing Settings**.
3. Click **Edit**. Apply the changed and click **Save**.

Bypass Security and Sharing

In some limited use cases, you may want to allow specific users to manipulate all loyalty-related data, including parent records. An example of such case is to allow Experience Cloud guest users to update Accounts from a contact form.

The manage package includes a custom permission **SessionM Bypass Security and Sharing** (smsfsc.SessionM_Bypass_Security).

!!! **This custom permission disables all CRUD, FLS, and record access checks in the SessionM package, please make sure the data is protected in a different way**.

To assign the custom permission to a user, you can:

1. Add the custom permission to a permission set and assign it to the user:
    a. Go to **Setup.**
    b. Click **Quick Find** and search for "permission". Click **Permission Sets.**
    c. Click **New**. Name the permission set.
    d. Select **Custom Permissions**.
    e. Click **Edit**. Add the **SessionM Bypass Security and Sharing** custom permission and click **Save**.
    f. Click **Manage Assignments**.
    g. Click **Add Assignments**. Select the user(s) and click **Assign**.
2. Add the custom permission to a profile:
    a. Go to **Setup.**
    b. Click **Quick Find** and search for "profiles". Click **Profiles**.
    c. Select the profile to update.
    d. Select **Custom Permissions**.
    e. Click **Edit**. Add the **SessionM Bypass Security and Sharing** custom permission and click **Save**.
3. Add the custom permission to the guest user profile:
    a. Go to **Setup.**
    b. Click **Quick Find** and search "sites". Click **Sites** under **Sites and Domains**.
    c. Select the site.
    d. Click **Public Access Settings**.

e. Update the profile as describes at point #2 above.

API Retry Mechanism

The SessionM package implements automatic retry logic for API requests to the SessionM Platform that receive server errors (5xx). This service applies to:

- User interactions with the SessionM Loyalty Package Lightning Web Components for making updates to a customer's profile, points balance, offer wallet, etc.
- Automatic syncing of Account or Contact records to SessionM customer profiles

You can configure the retry settings in the package configuration page, using the following fields:

1. **API Request Retry Attempts**: The maximum number of retries to call SessionM APIs before logging an error.
2. **API Request Retry Base Delay**: The base delay interval (in seconds) for retrying failed API calls to the SessionM Platform. Used for exponential backoff.
3. **API Request Retry Max Delay**: The maximum delay (in seconds) between two retries to call SessionM APIs.

The delay between retries is the base delay interval (set at point 2. above) multiplied by 2 to the power of the max number of retries (set at point 1. above) or the max delay (set at point 3. above), whichever is lower.

```
min([API Request Retry Base Delay] * 2^[API Request Retry
Attempts], [API Request Retry Max Delay])
```

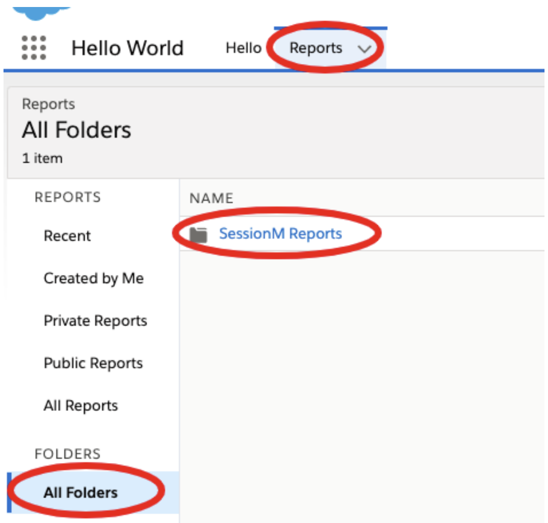
Client errors (4xx) are not eligible for automatic retries and indicate that the user needs to revise the request to correct the problem.

Internal User Activity Log

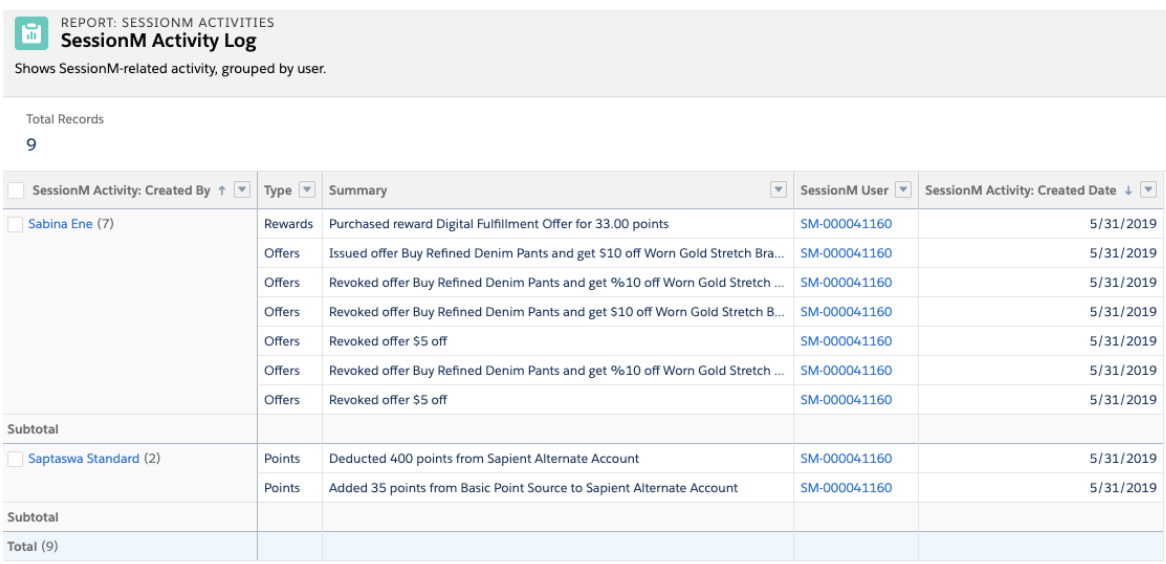
The SessionM package can log Salesforce user activity based on what SessionM-related actions they take, to be used for auditing purposes. Check Custom Package Settings on how to enable these logs.

To see the internal activity logs, navigate to the pre-packaged report:

1. Go to the **Reports** tab, select **All Folders** on the left side and choose **SessionM Reports.**



2. Choose **SessionM Activity Log.** A pre-configured report with all activity logs opens. You can edit the report to customize which fields to display.



REPORT: SESSIONM ACTIVITIES
SessionM Activity Log
Shows SessionM-related activity, grouped by user.

Total Records
9

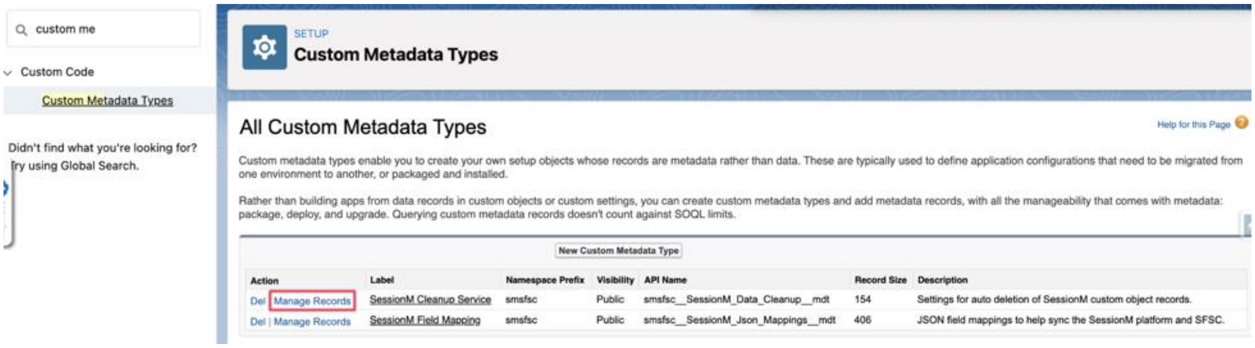
SessionM Activity: Created By ↑	Type	Summary	SessionM User	SessionM Activity: Created Date ↓
Sabina Ene (7)	Rewards	Purchased reward Digital Fulfillment Offer for 33.00 points	SM-000041160	5/31/2019
	Offers	Issued offer Buy Refined Denim Pants and get $10 off Worn Gold Stretch Bra...	SM-000041160	5/31/2019
	Offers	Revoked offer Buy Refined Denim Pants and get %10 off Worn Gold Stretch ...	SM-000041160	5/31/2019
	Offers	Revoked offer Buy Refined Denim Pants and get $10 off Worn Gold Stretch B...	SM-000041160	5/31/2019
	Offers	Revoked offer $5 off	SM-000041160	5/31/2019
	Offers	Revoked offer Buy Refined Denim Pants and get %10 off Worn Gold Stretch ...	SM-000041160	5/31/2019
	Offers	Revoked offer $5 off	SM-000041160	5/31/2019
Subtotal				
Saptaswa Standard (2)	Points	Deducted 400 points from Sapient Alternate Account	SM-000041160	5/31/2019
	Points	Added 35 points from Basic Point Source to Sapient Alternate Account	SM-000041160	5/31/2019
Subtotal				
Total (9)				

Cleanup Service

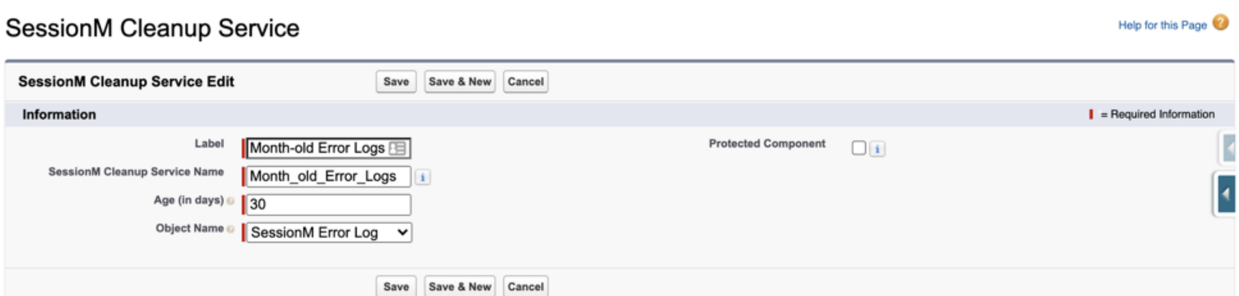
The cleanup service removes old SessionM-related custom object records daily. The service is disabled by default. To configure it:

1. Go to **Setup**.

2. Next to **SessionM Cleanup Service**, click **Manage Records**.



3. Click **New**.
4. Type a label of your choice for the service. The name should be automatically populated.
5. Choose the custom object and the age (in days) of the records that need to be deleted. In the example below, age 30 means that every day at midnight SessionM Error Log records older than 30 days are deleted.



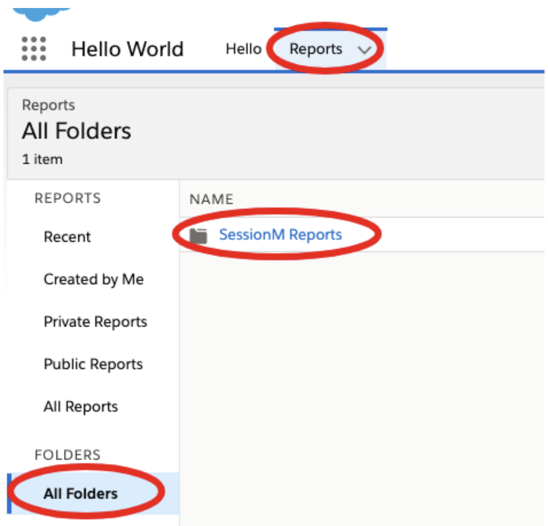
6. Click **Save**.
7. Repeat steps 3-6 for each object you want to clean.

Custom Debug Logs

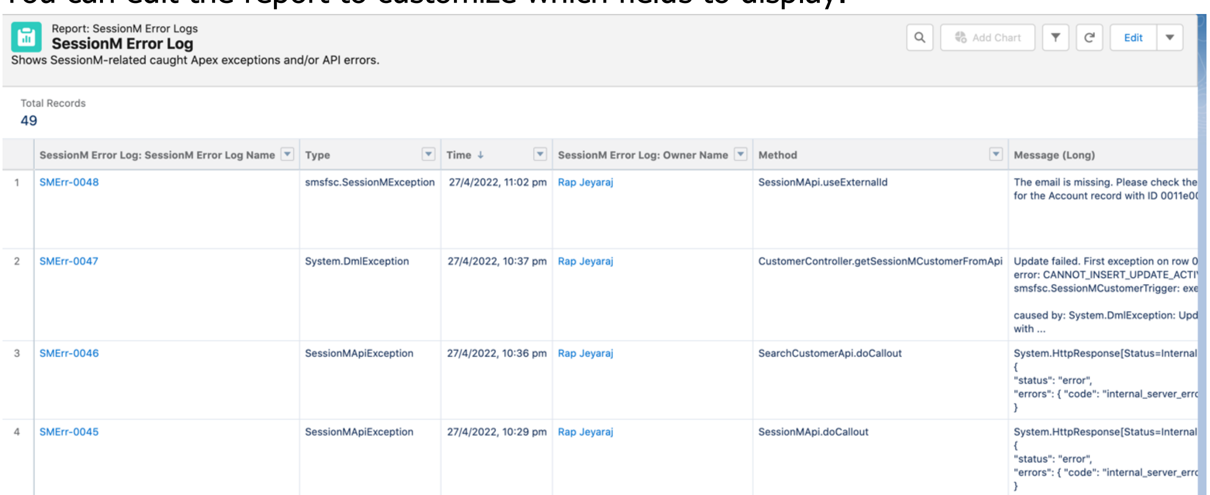
The SessionM Loyalty package offers a custom error logging service to capture errors from the package code and from the API responses. **Debug Mode** needs to be enabled, please check Custom Package Settings.

To see the custom debug logs, navigate to the pre-packaged report:

3. Go to the **Reports** tab, select **All Folders** on the left side and choose **SessionM Reports.**



4. Choose **SessionM Error Log.** A pre-configured report with all custom error logs opens. You can edit the report to customize which fields to display.



Using SessionM Loyalty Package Code

Global Methods

You can integrate SessionM Loyalty Package functionality into your custom code by using the following global methods:

syncToSessionM(parentRecords, oldParentRecords)

Syncs parent (Account/Contact) records in bulk to SessionM. The loyalty data is first staged into related smsfsc__SessionMUser__c records, then sent to SessionM via API, based on the configured field mapping.

Signature

```
global static void syncToSessionM(List<SObject> parentRecords,
Map<Id, SObject> oldParentRecords)
```

Parameters

parentRecords

- Type: List<SObject>
- Description: Parent records to sync to SessionM

oldParentRecords

- Type: Map<Id, SObject>
- Description: Parent records old data before the update, mapped by record ID; null if the records are new

Return Value

Type: void

Usage

Can be used to sync parent records that existed in Salesforce before the SessionM Loyalty package was installed or to sync new parent records created while the Sync Customer Changes with SessionM flag was disabled.

Examples

This following snippet shows how to call the method and pass in the parent records from a trigger context.

```
smsfsc.SessionMGlobalHandler.syncToSessionM(Trigger.new,
Trigger.oldMap);
```

This following snippet shows how to call the method and pass in the parent records from another context without old data.

```
smsfsc.SessionMGlobalHandler.syncToSessionM(parentRecordList, null);
```

Appendix A – Offer View Fields

The Salesforce admin user can combine fields from different field lists for each of the offer-related components, as follows:

Component	Field Lists
Available Offers	#1 Offers Overview + #5 Offer Details
Issued Offers	#3 User Offers + #5 Offer Details + #6 User Offer Details
Redeemed Offers	#4 User Offer History + #5 Offer Details + #6 User Offer Details
Expired Offers	#4 User Offer History + #5 Offer Details + #6 User Offer Details
Reward Store	#2 Reward Store Offers + #5 Offer Details

Field Lists

Table	Field List #1: Offers Overview
Source	InfoV2: /api/2.0/offers/fetch_offers_overview
Fields	`offer_id, root_offer_id, offer_type, title, description, start_date, purchase_count, redemption_count`

Table	Field List #2: Reward Store Offers
Source	RewardStoresV2: /api/2.0/rewardstores/get_reward_store_offers
Fields	`id, root_offer_id, reward_store_id, title, description, start_date, price, terms, purchase_count, redemption_count`

Table	Field List #3: User Offers
Source	InfoV2: /api/2.0/offers/get_user_offers
Fields	`id, offer_id, offer_type, name, description, is_redeemable`

Table	Field List #4: User Offer History
Source	InfoV2: /api/2.0/offers/user_offer_history
Fields	`offer_id, user_offer_id, offer_type, title, description`

Table	**Field List #5: Offer Details**
Source	InfoV2: /api/2.0/offers/fetch_offer
Fields	`status, pos_discount_id, acquisition_start_date, acquisition_end_date, redemption_start_date, redemption_end_date, points, monetary_value, weight, value_after_end_date, validity_period, validity_unit, reward_store, custom_data, requires_extended_data, all_items_eligible, terms`

Table	**Field List #6: User Offer Details**
Source	InfoV2: /api/2.0/offers/get_user_offer_details
Fields	`status, acquire_date, redeem_date, activation_date, redemption_start_date, redemption_end_date, redeem_reason, redeemed_by_id, redeemed_by_store_id, redeemed_by_user_id, redeemed_by_type, redeemed_store_id, immediate_issue_and_redeem, force_redeemed, pending_extended_data, facebook_shared, pos_offer_id, points_spent, reference_id, reference_type, custom_data`