SessionM Loyalty for Service Cloud Migration Guide

Version 1.x to 2.4 Balaton and higher: *December 2022*

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Overview

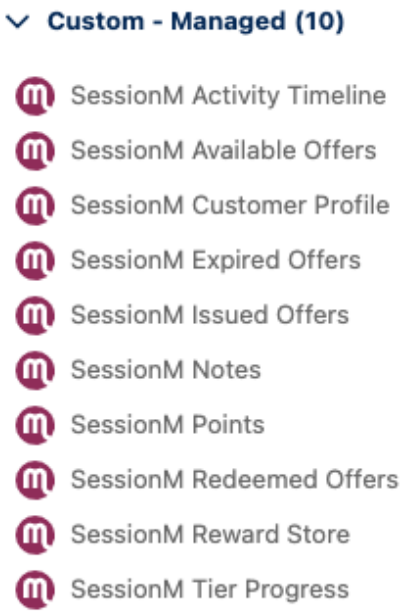
Note on this Documentation

This guide describes the two-step process needed to upgrade from a v1.x version to v2.4 Balaton and higher.

What Is New in v2.x?

Major UI Changes

Starting with v2.0 Como, you can choose from ten different components, each corresponding to a single SessionM functional area, to drag and drop onto your Lightning page.



This allows your users to access loyalty data in different areas of the page for a complete view of the customer, instead of having to toggle back and forth within a single SessionM pane.

The components can also be displayed only for specific users or based on certain record criteria – by simply using the built-in **Component Visibility** filter.

Sync to SessionM Automatically with Account/Contact Updates

Account or Contact updates can now be automatically sent to the SessionM Platform. Configure the new field mapping introduced in v2.1 Como and every Account/Contact update will automatically update the corresponding SessionM customer profile. Check the admin guide for more information.

Use Cases

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.

Upgrading from 1.x to 2.x

Before Upgrading

Testing

We advise that you test the upgrade first in a sandbox to make sure it works as you expect.

Backwards Compatibility

Please keep in mind that upgrading to another major version does not guarantee backwards compatibility with v1.x.

Data and Metadata

As per the Salesforce documentation, the data and metadata are not deleted.

> *Data and metadata are never deleted in a subscriber org without specific action by the customer. When a subscriber upgrades to the new package version, the deleted components are still available in the subscriber's org. The components are displayed in the Unused Components section of the Package Details page. This section ensures that subscribers have the opportunity to export data and modify custom integrations involving those components before explicitly deleting them.*

The customer profile is the only loyalty data stored in Salesforce by the SessionM managed package. The package versions 2.0 and higher bring significant changes to the schema – please read Appendix A – Deprecated Metadata for more information. However, a data migration is not needed; the SessionM platform is the source of truth for loyalty data and it can be refreshed in Salesforce anytime by using the Customer Profile component.

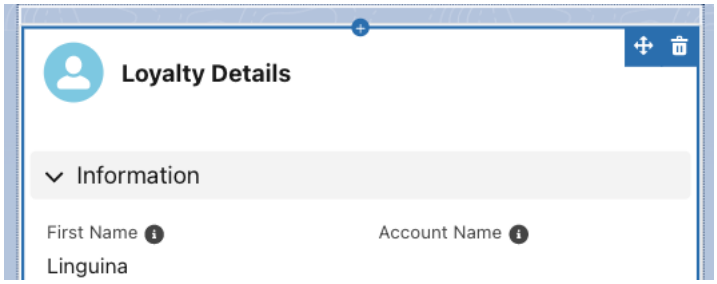
User Training

Given the major updates in the UI and configuration process of the managed package, please consider user training before rolling out the new changes.

Preliminary Step 1: Remove Component References

Please remove the *SessionMContainerCmp* component containing the single SessionM pane from all the pages.

1. Go to **Edit Page**.
2. Click on the component that you want to remove and click the bin icon on the top right corner.



3. Click **Save**.

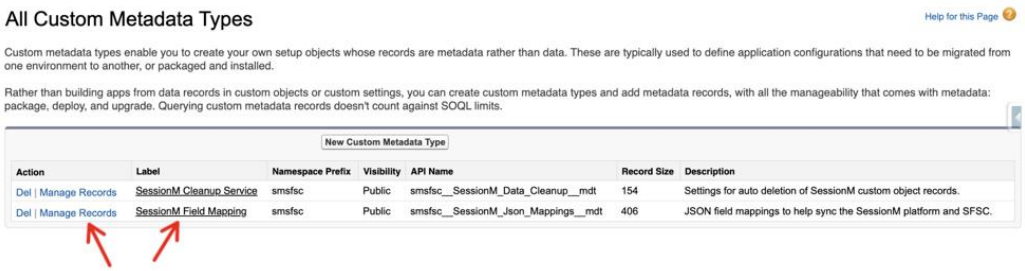
Preliminary Step 2: Check the Field Mapping

Starting with v2.0 Como, each field in the field mapping is validated before sending data to SessionM. Make sure the field mapping contains only fields that exist in your org.

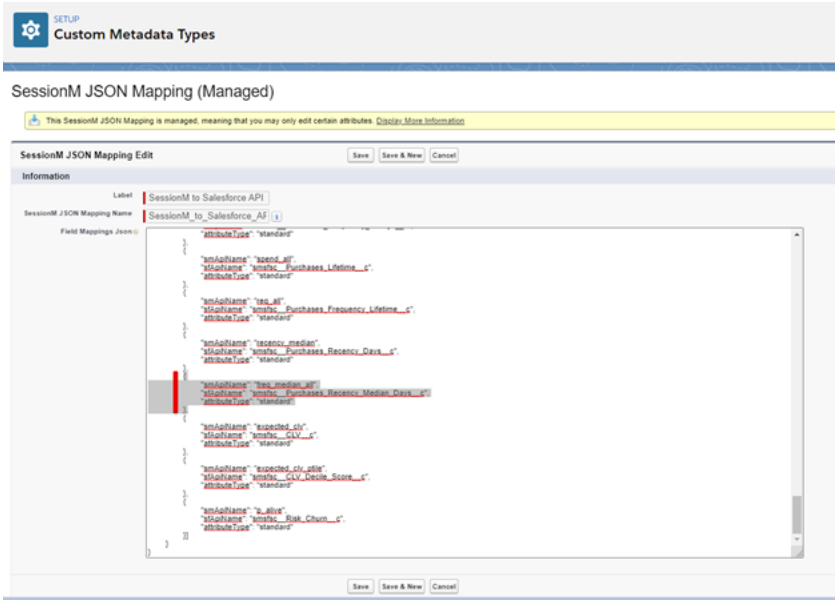
For example, the default mapping in v1.x erroneously included an invalid field *smsfsc__SessionMUser__c.smsfsc__Purchases_Recency_Median_Days__c.* If this field is still part of the mapping, it needs to be removed.

Also, all the Customer Lifecycle Value fields need to be updated with *attributeType: "customer_scores"* (examples for *smApiName* are *spend_7*, *freq_7*, *spend_30*, *freq_30*, *spend_all*, *freq_all*, *recency_median*, *expected_clv*, *expected_clv_ptile*, *p_alive*)

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.**

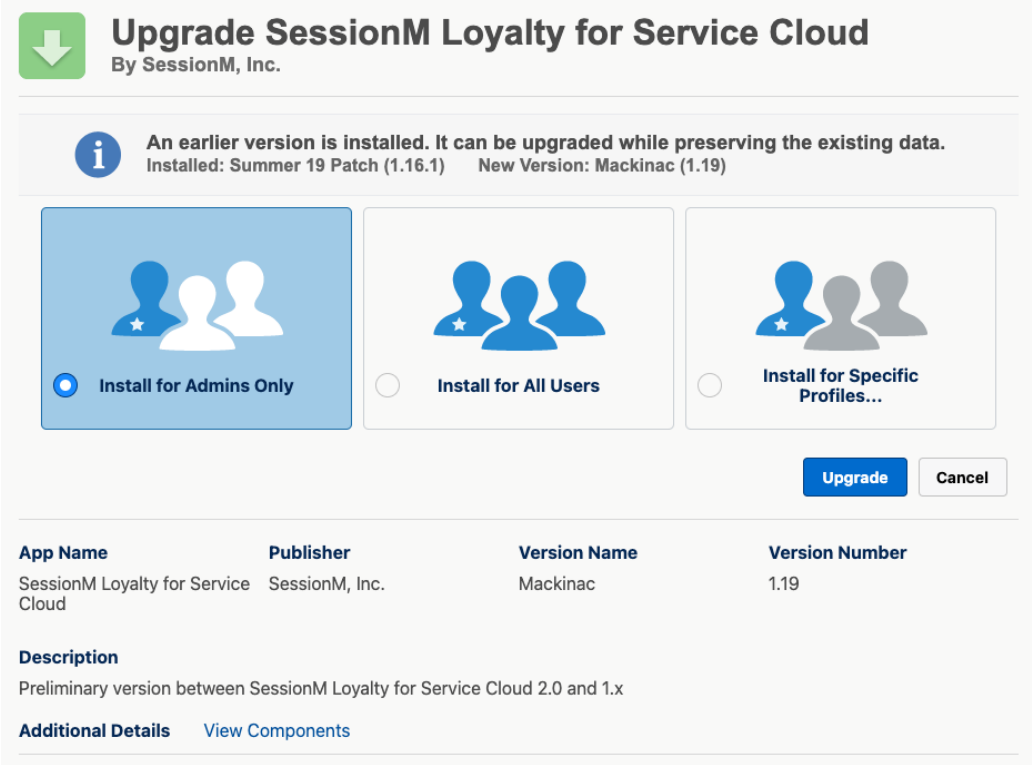


5. Click **Save**.

Step 1: Upgrade to v1.19 Mackinac

The first step requires an upgrade to an intermediary package version to remove obsolete metadata used for the single SessionM pane:

1. Open the v1.19 Mackinac installation URL and log into your org.
    - Click here to install v1.19 Mackinac to a Sandbox
    - Click here to install v1.19 Mackinac to Production
2. Select **Install for Admins Only**. This ensures that only System Administrators are provided access to the package during the installation. Click **Upgrade**.

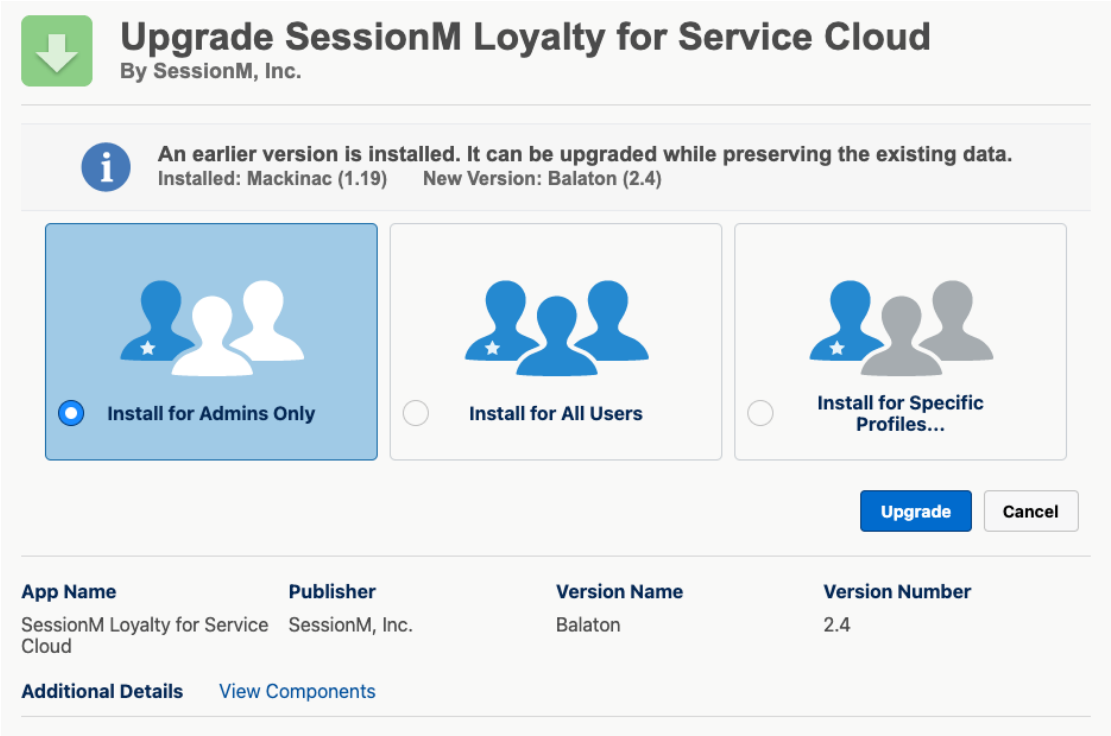


3. Click **Done** once the upgrade is complete. You will be redirected to the Installed Packages page. If the upgrade takes longer, you will receive an email after the upgrade has completed.

Step 2: Upgrade to v2.x

After the 1.x dependencies were removed in the previous step, you are ready to install the new version!

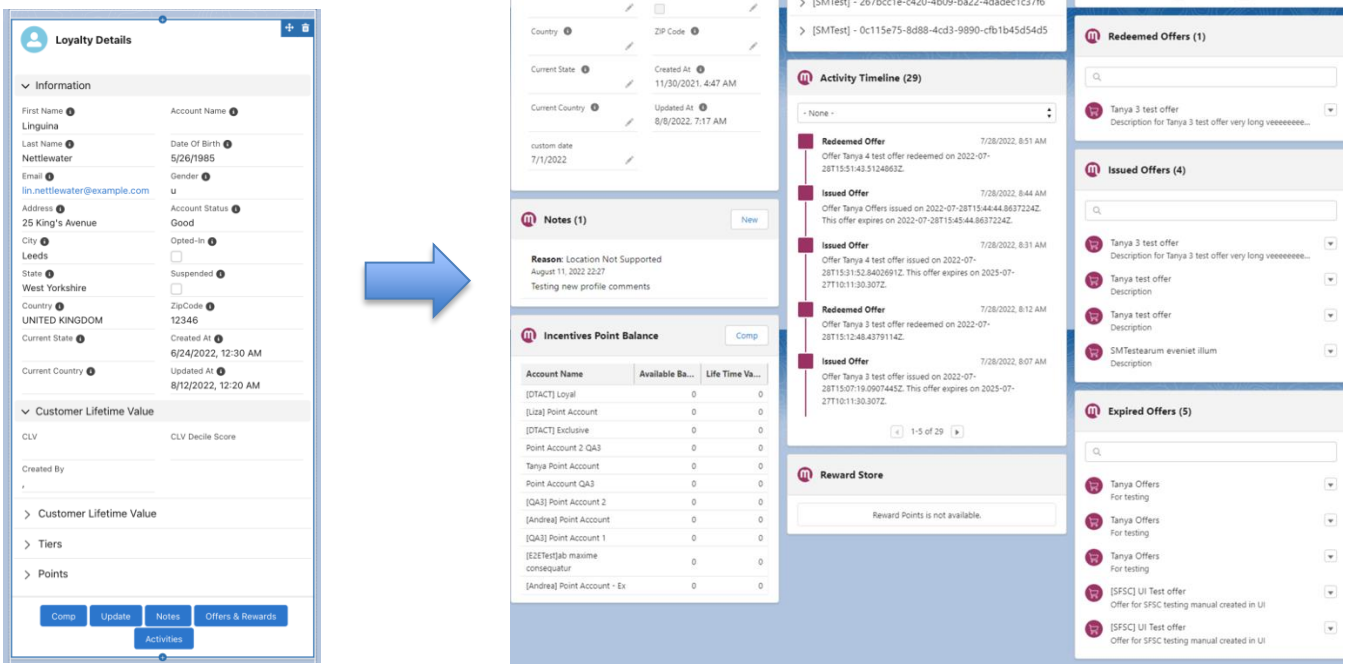
1. Visit our AppExchange listing to get the installation URL for the latest version. Log into your sandbox or production org.
2. Select **Install for Admins Only** and click **Upgrade**.



3. Click **Done** once the upgrade is complete. You will be redirected to the Installed Packages page. If the upgrade takes longer, you will receive an email after the upgrade has completed.
4. Read the admin guide to understand how to configure the package further.
5. You can now delete deprecated metadata if it's not used: Appendix A – Deprecated Metadata.

Lightning Components

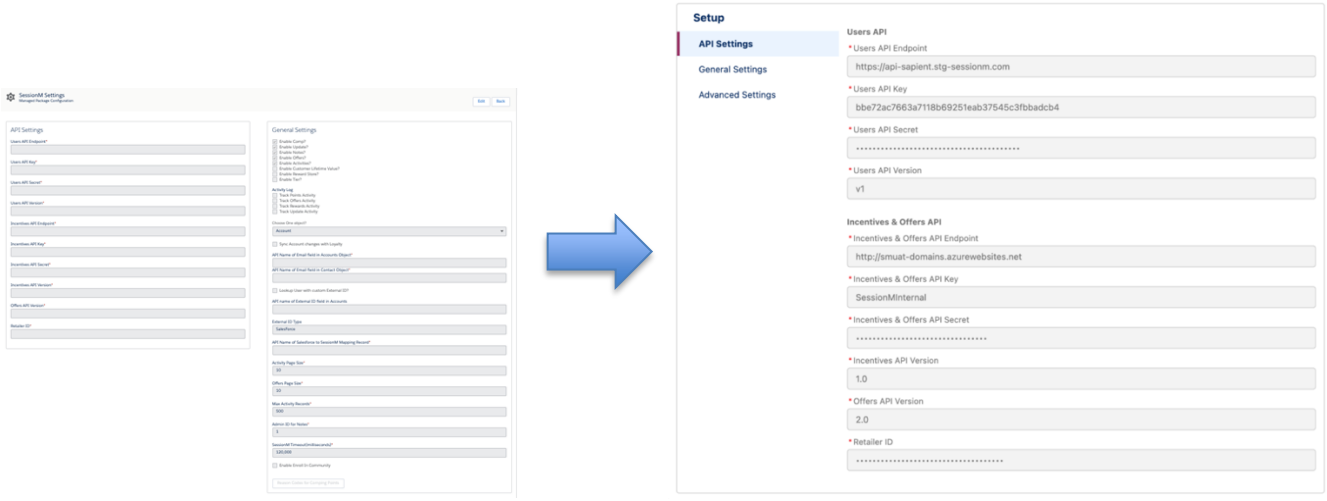
The single component that contained all the SessionM functionality in v1.x has been split into 10 different components, one for each functionality.



Refer to the admin guide for tips on how to embed these new components into the Lightning page layout.

Package Settings

Many of the fields from the package configuration page have been moved at component level. Starting with v2.4 Balaton, this page also has a new UI.

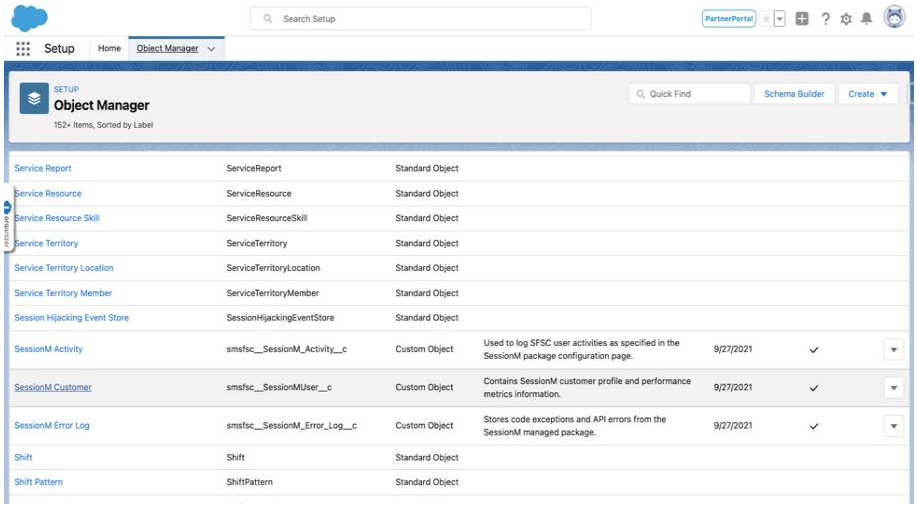


1. **Enable Notes?**, **Enable Offers?**, **Enable Activities?**, **Enable Reward Store?**, and **Enable Tier?** have been removed. To enable any of these functionalities, simply add the corresponding component to the page or use the **Component Visibility** filters to display them only for certain users or based on certain criteria.

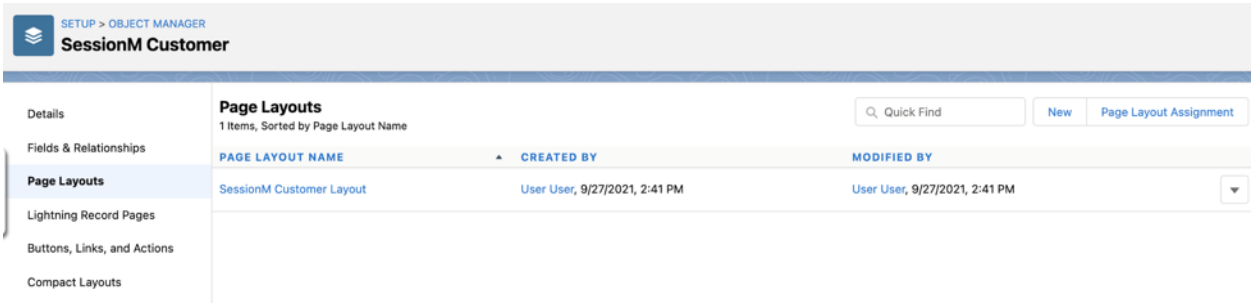
2. **Enable Customer Lifetime Value?** has also been removed. To add CLV to the page, you need to add the corresponding fields (attribute type *customer_score* in the field mapping) to the SessionM Customer page layout.

    a. Go to ⚙ Setup.

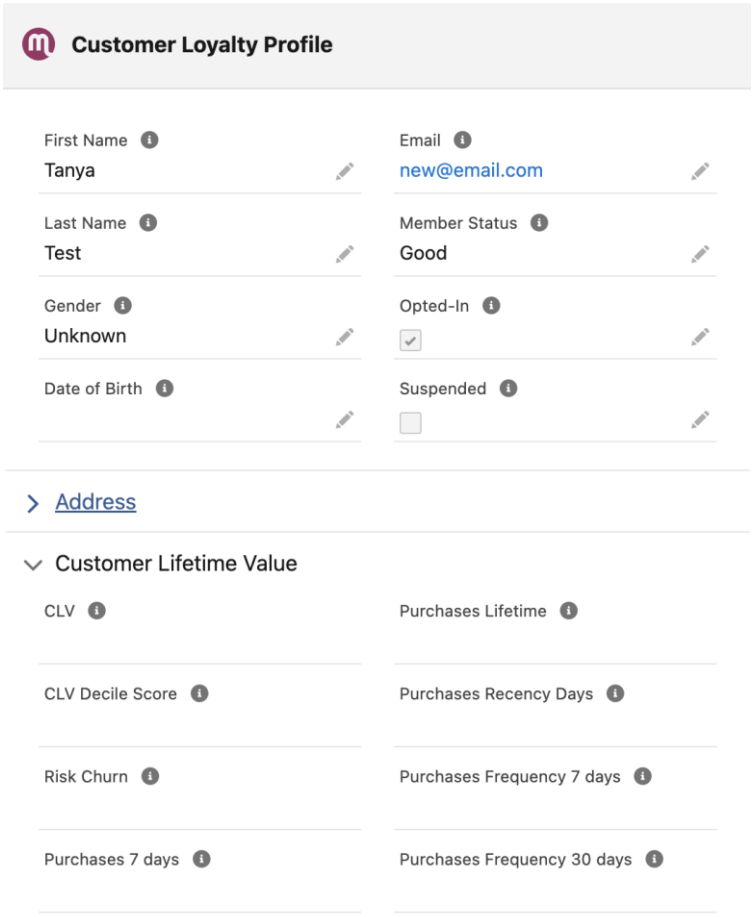
    b. Click the **Object Manager** tab and select **SessionM Customer**.



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



d. Modify the page layout as needed. Then click **Save** to save and exit. Example of how the component loads when the page layout contains multiple sections:



3. **Enable Comp?** has been moved to the Points Balance component.
4. **Enable Update?** has been moved to the Customer Profile component.
5. **API Name of Email field in Accounts Object** and **API Name of Email field in Contacts Object** have been merged into **Email Field in Parent Object**. Only one parent object can be selected (Account or Contact).

6. **API Name of Salesforce to SessionM Mapping Record** has been removed. Check the admin guide on how to update the field mapping.
7. **Activity Page Size** and **Max Activity Records** have been moved to the Activity Timeline component.
8. **Offers Page Size** has been moved to the Available Offers, Issued Offers, Redeemed Offers, Expired Offers, and Reward Store components.
9. **Admin ID for Notes** has been moved to the Notes component.
10. **Enable Enroll In Community** has been removed. The components can be used in Experience Cloud (former Community Cloud) by default. Please refer to the admin guide for more information.
11. **Reason Codes for Comping Points** has been removed. The reasons list is fetched dynamically from SessionM for both the Notes and Points Balance components.

Appendix A – Deprecated Metadata

The following is a list of deprecated metadata. These can be deleted by the admin user once the upgrade has been completed.

Name	Parent Object	Type	Available in Versions
account	SessionM Transaction	Custom Field	1.1 - 1.19
account_name	SessionM User	Custom Field	1.1 - 1.19
accountloyaltyuser	SessionM User	Custom Field	1.15 - 1.19
addnote	SessionM Transaction	Custom Field	1.5 - 1.19
api_offers_endpoint	SessionM Protected Settings	Custom Field	1.5 - 1.19
api_offers_key	SessionM Protected Settings	Custom Field	1.5 - 1.19
api_offers_secret	SessionM Protected Settings	Custom Field	1.5 - 1.19
configoptions	SessionM List Settings	Custom Field	1.6 - 1.19
contact	SessionM Transaction	Custom Field	1.14 - 1.19
cumulativeavailablepoints	SessionM Transaction	Custom Field	1.1 - 1.19
customboolean1	SessionM User	Custom Field	1.1 - 1.19
customboolean2	SessionM User	Custom Field	1.1 - 1.19
customboolean3	SessionM User	Custom Field	1.1 - 1.19
customboolean4	SessionM User	Custom Field	1.1 - 1.19
customboolean5	SessionM User	Custom Field	1.1 - 1.19
customdate1	SessionM User	Custom Field	1.1 - 1.19
customdate2	SessionM User	Custom Field	1.1 - 1.19
customdate3	SessionM User	Custom Field	1.1 - 1.19
customdate4	SessionM User	Custom Field	1.1 - 1.19
customdate5	SessionM User	Custom Field	1.1 - 1.19
customdatetime1	SessionM User	Custom Field	1.1 - 1.19
customdatetime2	SessionM User	Custom Field	1.1 - 1.19
customdatetime3	SessionM User	Custom Field	1.1 - 1.19
customdatetime4	SessionM User	Custom Field	1.1 - 1.19
customdatetime5	SessionM User	Custom Field	1.1 - 1.19
customdecimal1	SessionM User	Custom Field	1.1 - 1.19
customdecimal2	SessionM User	Custom Field	1.1 - 1.19
customdecimal3	SessionM User	Custom Field	1.1 - 1.19
customdecimal4	SessionM User	Custom Field	1.1 - 1.19
customdecimal5	SessionM User	Custom Field	1.1 - 1.19
customer_lifetime_value	SessionM List Settings	Custom Field	1.10 - 1.19
customer_no_sfcc	Contact	Custom Field	1.16 - 1.19
customer_number	Contact	Custom Field	1.16 - 1.19
custominteger1	SessionM User	Custom Field	1.1 - 1.19

custominteger2	SessionM User	Custom Field	1.1 - 1.19
custominteger3	SessionM User	Custom Field	1.1 - 1.19
custominteger4	SessionM User	Custom Field	1.1 - 1.19
custominteger5	SessionM User	Custom Field	1.1 - 1.19
customtext1	SessionM User	Custom Field	1.1 - 1.19
customtext10	SessionM User	Custom Field	1.1 - 1.19
customtext11	SessionM User	Custom Field	1.1 - 1.19
customtext12	SessionM User	Custom Field	1.1 - 1.19
customtext13	SessionM User	Custom Field	1.1 - 1.19
customtext14	SessionM User	Custom Field	1.1 - 1.19
customtext15	SessionM User	Custom Field	1.1 - 1.19
customtext2	SessionM User	Custom Field	1.1 - 1.19
customtext3	SessionM User	Custom Field	1.1 - 1.19
customtext4	SessionM User	Custom Field	1.1 - 1.19
customtext5	SessionM User	Custom Field	1.1 - 1.19
customtext6	SessionM User	Custom Field	1.1 - 1.19
customtext7	SessionM User	Custom Field	1.1 - 1.19
customtext8	SessionM User	Custom Field	1.1 - 1.19
customtext9	SessionM User	Custom Field	1.1 - 1.19
email_opt_in	Contact	Custom Field	1.16 - 1.19
email_opt_in_date	Contact	Custom Field	1.16 - 1.19
emailfieldincontact	SessionM List Settings	Custom Field	1.14 - 1.19
enabled_activities	SessionM List Settings	Custom Field	1.6 - 1.19
enabled_comp	SessionM List Settings	Custom Field	1.6 - 1.19
enabled_notes	SessionM List Settings	Custom Field	1.6 - 1.19
enabled_offers	SessionM List Settings	Custom Field	1.6 - 1.19
enabled_update	SessionM List Settings	Custom Field	1.6 - 1.19
external_id_field_in_accounts	SessionM List Settings	Custom Field	1.10 - 1.19
external_id_field_in_contact	SessionM List Settings	Custom Field	1.14 - 1.19
external_sessionmuser	Performance Metric	Custom Field	1.16 - 1.19
externalidtype	SessionM User	Custom Field	1.1 - 1.19
first_name	Account	Custom Field	1.16 - 1.19
last_name	Account	Custom Field	1.16 - 1.19
last_update_date	Contact	Custom Field	1.16 - 1.19
loyaltypoints	SessionM Transaction	Custom Field	1.1 - 1.19
mail_opt_in	Contact	Custom Field	1.16 - 1.19
mail_opt_in_date	Contact	Custom Field	1.16 - 1.19
maxactivityrecords	SessionM List Settings	Custom Field	1.1 - 1.19
membership_type_code	Contact	Custom Field	1.16 - 1.19
notes_admin_id	SessionM List Settings	Custom Field	1.5 - 1.19
notesreasoncodes	SessionM Transaction	Custom Field	1.5 - 1.19
offerdetails	SessionM User	Custom Field	1.6 - 1.19

pagesize	SessionM List Settings	Custom Field	1.1 - 1.19
pagesize_offer	SessionM List Settings	Custom Field	1.5 - 1.19
performancemetrics		Custom Object	1.16 - 1.19
phone_opt_in	Contact	Custom Field	1.16 - 1.19
phone_opt_in_date	Contact	Custom Field	1.16 - 1.19
purchases_30days	Performance Metric	Custom Field	1.16 - 1.19
purchases_7days	Performance Metric	Custom Field	1.16 - 1.19
purchases_frequency_30days	Performance Metric	Custom Field	1.16 - 1.19
purchases_frequency_7days	Performance Metric	Custom Field	1.16 - 1.19
purchases_frequency_lifetime	Performance Metric	Custom Field	1.16 - 1.19
purchases_lifetime	Performance Metric	Custom Field	1.16 - 1.19
purchases_recency_days	Performance Metric	Custom Field	1.16 - 1.19
reasoncodes	SessionM Transaction	Custom Field	1.1 - 1.19
reward_store	SessionM List Settings	Custom Field	1.10 - 1.19
sales_associate_no	Contact	Custom Field	1.16 - 1.19
segmentation_code_a	Contact	Custom Field	1.16 - 1.19
segmentation_code_b	Contact	Custom Field	1.16 - 1.19
segmentation_code_c	Contact	Custom Field	1.16 - 1.19
segmentation_code_d	Contact	Custom Field	1.16 - 1.19
segmentation_flag_a	Contact	Custom Field	1.16 - 1.19
segmentation_flag_b	Contact	Custom Field	1.16 - 1.19
segmentation_flag_c	Contact	Custom Field	1.16 - 1.19
segmentation_flag_d	Contact	Custom Field	1.16 - 1.19
segmentation_flag_e	Contact	Custom Field	1.16 - 1.19
segmentation_flag_f	Contact	Custom Field	1.16 - 1.19
segmentation_value_a	Contact	Custom Field	1.16 - 1.19
segmentation_value_b	Contact	Custom Field	1.16 - 1.19
segmentation_value_c	Contact	Custom Field	1.16 - 1.19
segmentation_value_d	Contact	Custom Field	1.16 - 1.19
sessionm_transaction		Custom Object	1.1 - 1.19
sessionm_user	Performance Metric	Custom Field	1.16 - 1.19
sessionmtosalesforcemappingsapiname	SessionM List Settings	Custom Field	1.1 - 1.19
sessionmuserparent	SessionM User	Custom Field	1.1 - 1.19
status	SessionM Transaction	Custom Field	1.1 - 1.19
store_no	Contact	Custom Field	1.16 - 1.19
tier_progress	SessionM List Settings	Custom Field	1.10 - 1.19
userlookupoption	SessionM List Settings	Custom Field	1.6 - 1.19