

SALESFORCE COMMERCE CLOUD USE CASE

SFCC Connector – Issuing an Offer to a SessionM Audience and Redeeming in Salesforce Commerce Cloud

Abstract

This use case demonstrates how you can leverage offers in the SessionM Offers Module with Salesforce Commerce Cloud (SFCC) to deliver personalized offer and redeem via SFCC.

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Contents

- Issuing an Offer to a SessionM Audience and Redeeming via SFCC.....3**
- Use Case Walkthrough..... 4
- Create Offer in SessionM Offers Module4
- Create Audience in the SessionM Audience Module6
- Issue Offer to Audience8
- Redeeming a SessionM Offer via SFCC..... 10
- SessionM Activity Log 12

Issuing an Offer to a SessionM Audience and Redeeming via SFCC

This use case demonstrates how you can leverage offers in the SessionM Offers Module with Salesforce Commerce Cloud (SFCC) to deliver personalized offers and redeem via SFCC.

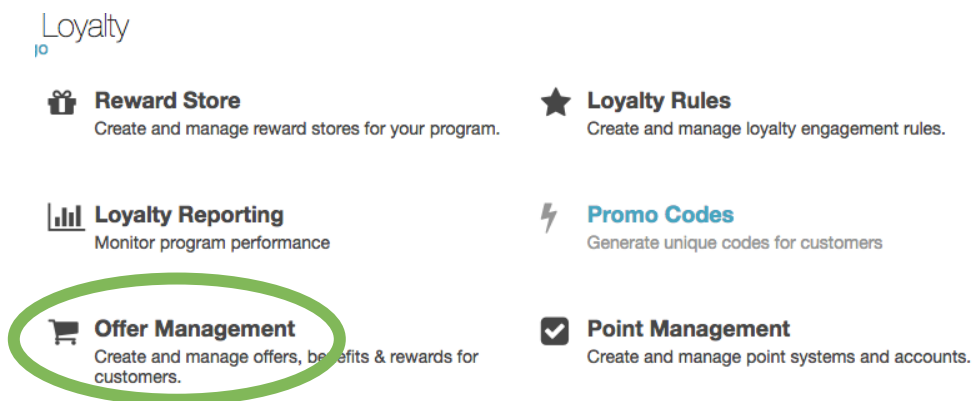
Use Case Walkthrough

The following procedure describes the steps to create an audience, issue an offer and synchronize the offer data via the SessionM SFCC Connector. When a user logs into SFCC the offer is available to redeem and SessionM will validate via closed-loop.

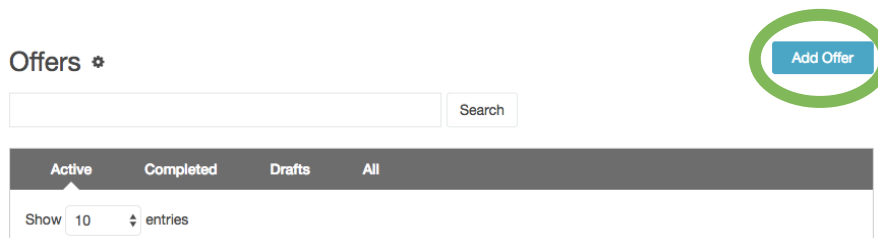
Create Offer in SessionM Offers Module

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. Select the Offer Type and click the **Create Offer** button.

Add Offer ✕

Title

Maximum 100 Characters.

Description

Maximum 1000 Characters.

Offer Type

Cancel Create Offer

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 (%)

10

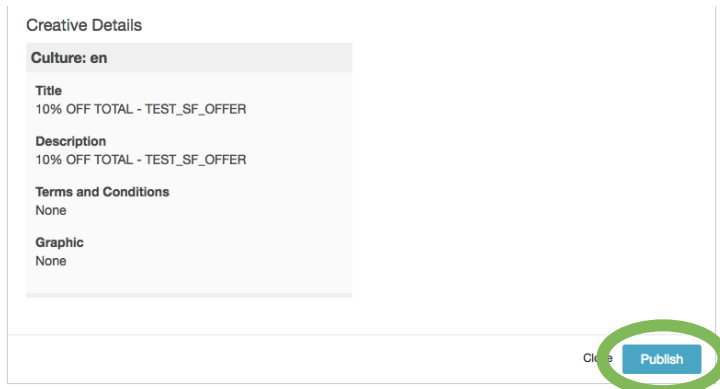
Specify a discount percentage between 0.00 and 100.00. For example, "20" would give a customer 20

Offer Title

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

Title

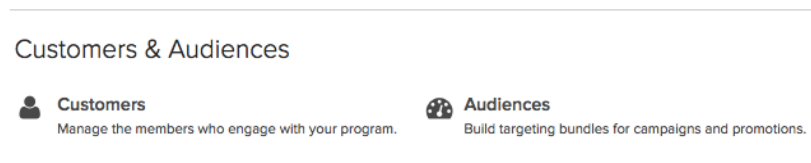
5. On the Publish page, click the **Publish** button to activate the offer.



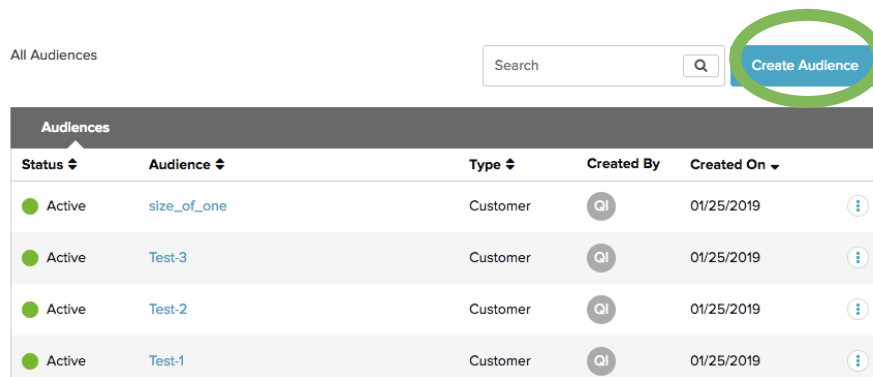
Create Audience in the SessionM Audience Module

Now, define the audience to whom the offer will be made.

1. Navigate to Audiences Module on the SessionM dashboard.



2. Click the **Create Audience** button.



- On the Audience Setup tab, enter the Audience Name and select **Customer** as the Type.

All Audiences > Create Audience

Setup Targeting

Audience Name: Offer Test Audience

Type: Customer

Next

- Specify audience criteria to filter the audience. In the example below, two criteria are specified: Gender is "Female" and State is "Massachusetts".

All Audiences > Offer Test Audience

Draft Offer Test Audience Delete Activate

Targeting

Gender: Female

AND

State: Massachusetts

Include

Add Attributes

Estimated Audience Size (real-time data)
72 users
*Does not reflect individual customer's message permissions.

Targeting Summary

Included

- Gender
 - Female

- Click **Save** and then **Activate**.

Issue Offer to Audience

The final step in the SessionM platform is to issue the offer to the audience.

1. On the All Audiences page of the SessionM Audiences Module, select the audience to which you want to issue the offer.

Audiences		
Status	Audience	Type
Active	Offer Test Audience	Customer

2. Click the **Offer Issuance** tab and then click the **Add Offer** button.

All Audiences > Offer Test Audience

Active Offer Test Audience

Details Exports **Offer Issuance**

Issue Bulk Offers

Add Offer

Issue Offer

3. Select the offer to issue. Then click the **Add** button.

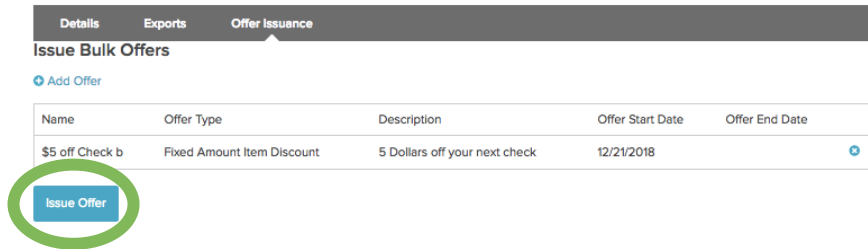
Select an Offer

Search by name or type

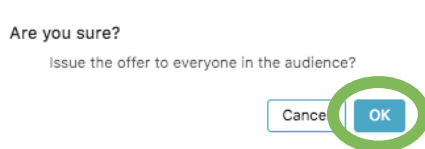
Name	Offer Type	Description	Offer Start Date	Offer End Date
<input checked="" type="radio"/> \$5 off Check b	Fixed Amount Item Discount	5 Dollars off your next check	12/21/2018	
<input type="radio"/> 50% off second item	Buy X Get Y Percent	By one, get 50% off	12/29/2018	
<input type="radio"/> Perpetual Offer	Percent Item Discount	Place in reward store to always use	01/16/2019	
<input type="radio"/> TEST-OFFER	Buy X Get Y Percent	TEST-OFFER	01/09/2019	
<input type="radio"/> XYZ	Buy X Get Y Percent	XYZ	01/17/2019	

Cancel **Add**

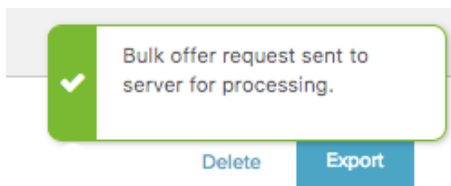
4. Click the **Issue Offer** button to add the offer to the list of bulk offers.



5. When prompted, click the **OK** button to issue the offer.



A modal appears with a message that the “Bulk Offer request sent to Server for processing”.



6. View the job status on the Offer Issuance tab.

History [Refresh](#)

Status	Offer	Audience size	Processed	Errors	Issued by	Issue date
Completed	\$5 off Check	72	72	0	CI	01/28/2019 1:43pm

Redeeming a SessionM Offer via SFCC

When the Offer Issuance is complete it will be available in a customer's SFCC Offer Wallet.

1. Login as a customer

My Account Login

RETURNING CUSTOMERS • **REQUIRED**

If you are a registered user, please enter your email and password.

• **Email Address**


• **Password**

Remember Me

2. Add items to cart, and click **Checkout** button

[« Continue Shopping](#)

CHECKOUT

PRODUCT	QTY	PRICE	TOTAL
 <p>Charcoal Flat Front Athletic Fit Shadow Striped Wool Suit - PromotionTest_WithoutQualifying Item No.: 640188016624 Color Charcoal Size 38 Width Regular Edit Details</p>	1 Remove Add to Wishlist	In Stock \$500.00 \$299.99	List Price \$299.99 Get 20% off of this tie. Item Total \$239.99


Enter coupon code

Subtotal	\$239.99
Shipping	-
Sales Tax	-
Estimated Total	\$239.99

3. As part of the check-out process, the SFCC Cartridge exposes the users SessionM Offer Wallet. Click the **Apply** button to add the offer to the cart.

OFFER WALLET

Your Offers **Eligible**

 \$5 off Check

Apply

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

ORDER SUMMARY
[Edit](#)


▶ *Charcoal Flat Front Athletic Fit Shadow Striped Wool Suit*
Color Charcoal
Size 38
Width Regular
 Qty: 1 \$239.99

Subtotal	\$239.99
Offer Discount	-\$5.00
Total Order Discount	-\$5.00
Edit Shipping Ground	\$9.99
Sales Tax	\$12.25
Order Total:	\$257.23

5. The user has the ability to remove the offer by clicking the **Cancel**.

OFFER WALLET

Your Offers Eligible **Applied**



\$5 off Check

Cancel

6. When the order is complete, click the **Continue to Place Order** button.

• **Expiration Date:**

• **Security Code** [What is this?](#)

Save this card

CONTINUE TO PLACE ORDER >

The purchase and offer redemption events are sent to SessionM.

SessionM Activity Log

In the SessionM Customers module, the purchase and offer redeem events logged are available in the Activity Log.

Activity Campaigns Notes Profile Member Profile Offers Digital Properties

Points Point Audit Log Activity Log Rewards Promo Codes Campaigns Tier

Offer Redeemed x

Purchase Transaction x

Date & Time	Activity	Additional details
02/25/2019 @ 4:31pm EST	Offer Redeemed	ab7db843-6061-4315-9e61-109f9bb8b6cc
09/20/2018 @ 3:38pm EST	Offer Redeemed	
09/19/2018 @ 1:36pm EST	Offer Redeemed	
09/19/2018 @ 1:36pm EST	Offer Redeemed	
09/19/2018 @ 1:32pm EST	Offer Redeemed	