

## 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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# Contents

- How to Set Up a File Drop Automation in SFMC..... 3**
- Key Concepts ..... 3
  - Secure File Transfer Location ..... 3
  - File Drop ..... 3
- Order of Operations: Create File Drop Automation ..... 3
- Step 1. Edit FTP Users (If Using SFMC SFTP Facility)..... 4
- Step 2. Create File Transfer Location ..... 5
- Step 3. Define File Drop Automation..... 7
- Step 4. Test Automation..... 11

# How to Set Up a File Drop Automation in SFMC

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

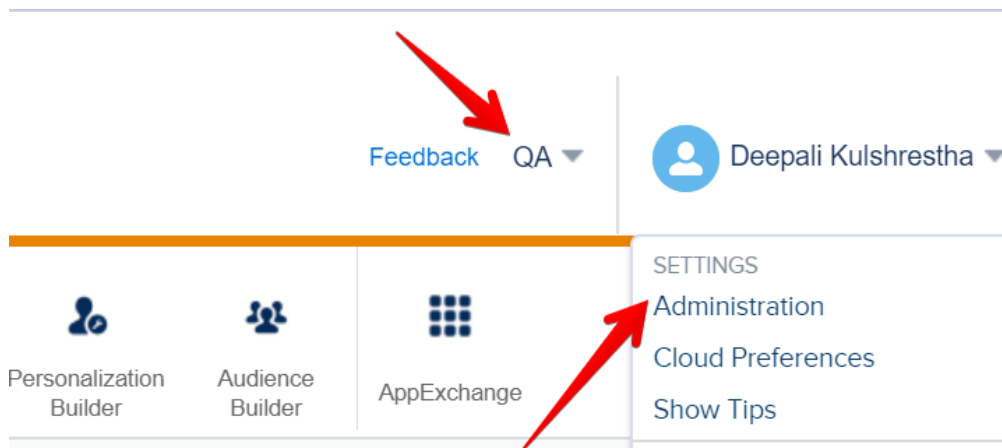
Complete the following steps to create a file drop automation. You must have administrator privileges to complete this procedure.

1. Edit FTP users.
2. Create file transfer location.
3. Create file drop automation.
4. Test automation.

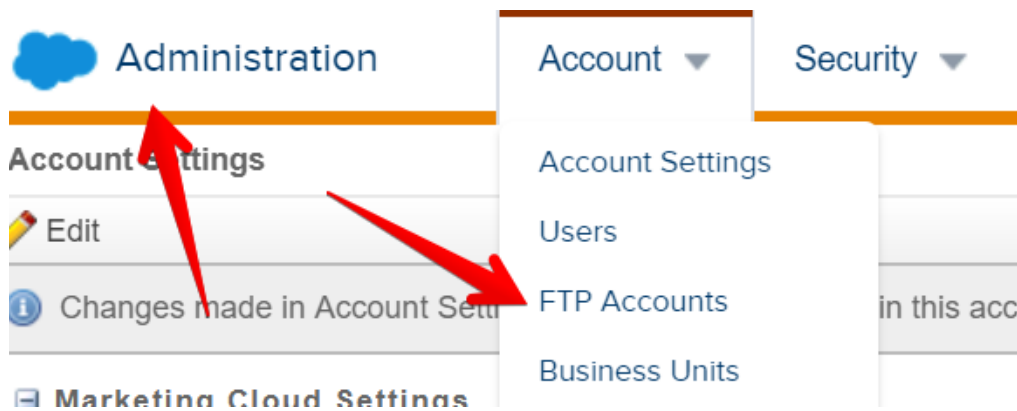
## Step 1. Edit FTP Users (If Using SFMC SFTP Facility)

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

1. Go to the STG POS Sapiient environment in SFMC.
2. In the Settings menu, click **Administration**.



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



#### 4. Edit the FTP users.

Administration | Account | Security | Applications | Data Management | Feedback | QA | Deepali Kulshrestha

FTP Accounts

FTP Site Information

URL  
mcnpg49yfd1d8f1ff8g11g061y4y.ftp.marketingcloudops.com

Port  
22

FTP Users

FTP Username	Status	Password Expiration Date
100004212	Enabled	06/07/2019

Activity

Activity	Status	Requested By	Date
Edited 100004212	Success	Deepali Kulshrestha	03/09/2019 1:39 AM
Added 100004212	Success	pgali	02/16/2018 2:07 PM

## Step 2. Create File Transfer Location

1. Go to Email Studio and select **Email**.
2. Click **Admin** and then **File Locations**.

Email | Overview | Content | Subscribers | Interactions | A/B Testing | Tracking | Admin | Audience Builder

Admin

- Account Settings
- Data Management
  - File Locations**
  - Key Management
- Send Management

File Locations

Create Delete

Name	External Key	Description
<a href="#">Salesforce Objects &amp; Reports</a>	Salesforce Objects & Reports	Salesforce Objects & Reports
<a href="#">ExactTarget Enhanced FTP</a>	ExactTarget Enhanced FTP	Enhanced FTP
<a href="#">SMP SFTP</a>	SeesionSMP	

#### 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.

Apps

Email Overview Content Subscribers Interactions A/B Testing Tracking Admin

Admin

- Account Settings
- Data Management
  - File Locations**
  - Key Management
- Send Management

File Locations > SMP SFTP

Save Delete Cancel

Properties

**Name** (required)  
SMP SFTP

**External Key**  
SeesionSMP

**Description**

Location Information

**Location Type** (required)  
External SFTP Site

**Uri** (required)  
mcnpg49yfd1d8f1ff8g11g061y4y.ftp.marketingcloudops.com/Imports/Offers

**Port** (required)  
22

**Username**  
100004212

**Auth Type** (required)  
Password

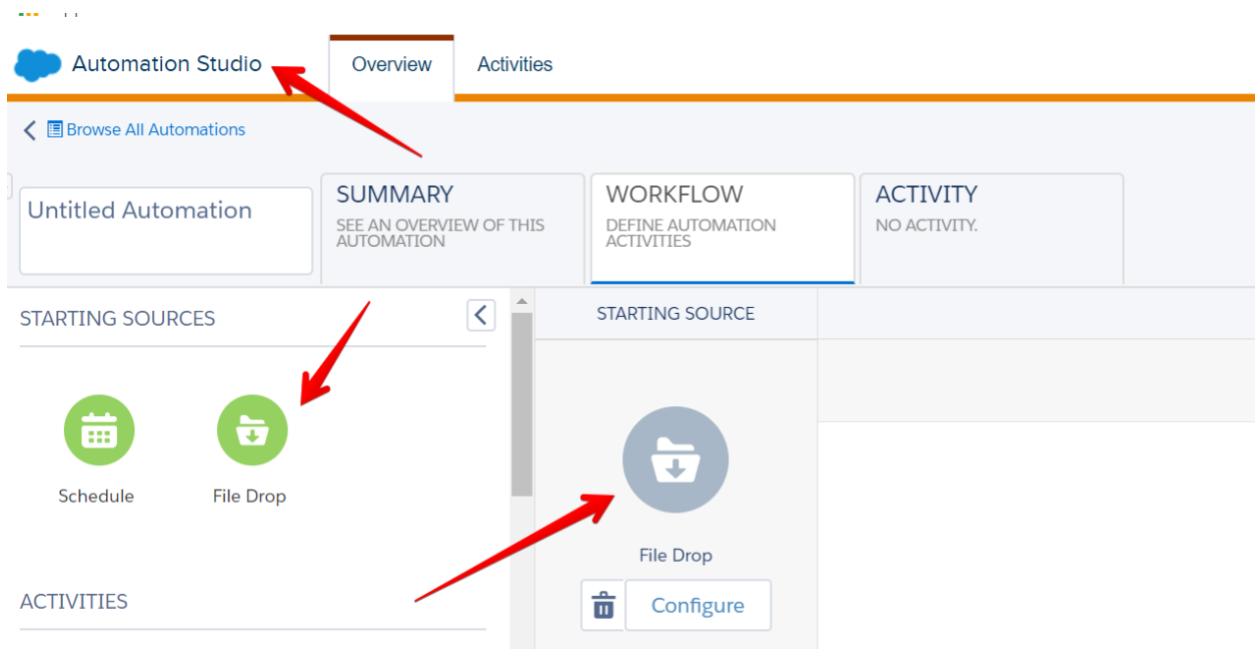
**Password** \*

**Retype 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.

### File Drop Setup

#### Choose Directory

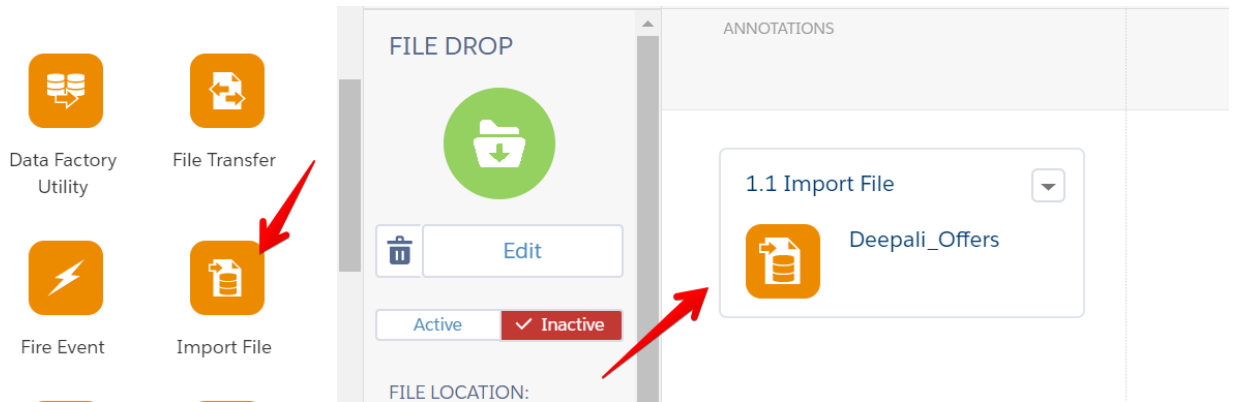
Select a directory. When a file is dropped into this directory, the automation begins. Select Use filename pattern if the automation filename.

No Filename Pattern ?

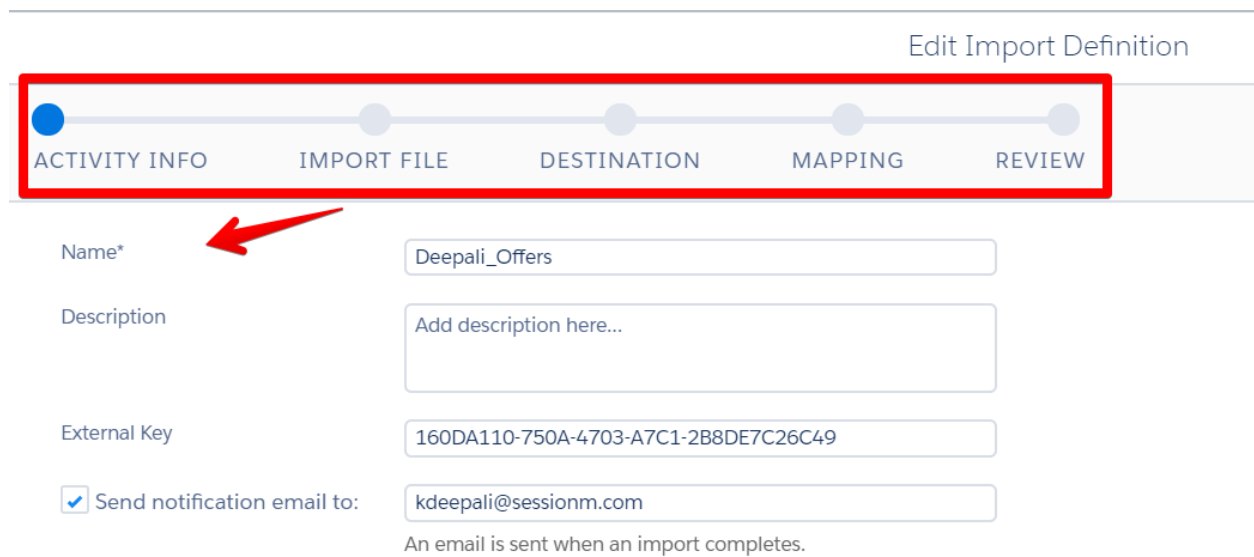
Use Filename Pattern ?

import  
 offers  
 triggered\_automations

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 “|”.



Edit Import Definition

ACTIVITY INFO   **IMPORT FILE**   DESTINATION   MAPPING   REVIEW

File Location\* SMP SFTP

mcnpg49yfd1d8f1f8g11g061y4y.ftp.marketingcloudops.com/Imports/Offers/<your file>

File Naming Pattern\* %%FILENAME\_FROM\_TRIGGER%%

Example File Name: %%FILENAME\_FROM\_TRIGGER%%

Date Format English (United States)  
Example: 1/19/2016 1:44 PM

Delimiter\* Other Specify: |

Respect double quotes ( " ) as a text delimiter

Bad Data Behavior  Skip rows with bad data

▶ Advanced File Options

8. Select **Data Extension** and then **SessionM\_Offers**.

Edit Import Definition

ACTIVITY INFO   IMPORT FILE   **DESTINATION**   MAPPING   REVIEW

▼ Data Extensions   Subscriber List Selected Data I

Search

NAME ↑	EXTERNAL KEY	RECORD COUNT	FIELD COUNT
Sample Test User JSON	321ADC43-EAD1-4608-9419-282D3D203D7A	4	5
Sessionm_OFFERS	Sessionm_OFFERS	0	16
Sessionm_PURCHASES	Sessionm_PURCHASES	0	15

### 9. Select **Add and Update**.

Edit Import Definition

ACTIVITY INFO   IMPORT FILE   DESTINATION   MAPPING   REVIEW

Data Action\*  Add Only  
Add new data to your target data extension.

Update Only  
Update the current data in your target data extension.

**Add and Update**  
Update existing data and add new data to your target data extension.

Overwrite **!**  
Replace or overwrite the current data in your target data extension.

Map by Header Row **!**    Map by Ordinal **!**    Map Manually **!**

"SESSIONM_OFFERS" (DATA EXTENSION)	
Required columns needed for this file mapping	
Offer_Order_ID	Number
User_ID	Text
Offer_ID	Text
Optional columns	

### 10. Review the import definition.

Edit Import Definition

ACTIVITY INFO   IMPORT FILE   DESTINATION   MAPPING   REVIEW

**Activity Info** Edit

Name: Deepali\_Offers

External Key: 160DA110-750A-4703-A7C1-2B8DE7C26C49

Email Notification: kdeepali@sessionm.com

Description:

**Import File** Edit

File Location: SMP SFTP

File Naming Pattern: %%FILENAME\_FROM\_TRIGGER%%

Date Format: English (United States)

Delimiter: |

Bad Data Behavior: Skip rows with bad data

Import Options: Respect double quotes (") as a text delimiter

**Destination** Edit

Data Extension: Sessionm\_OFFERS

**Mapping** Edit

Data Action: Add and Update

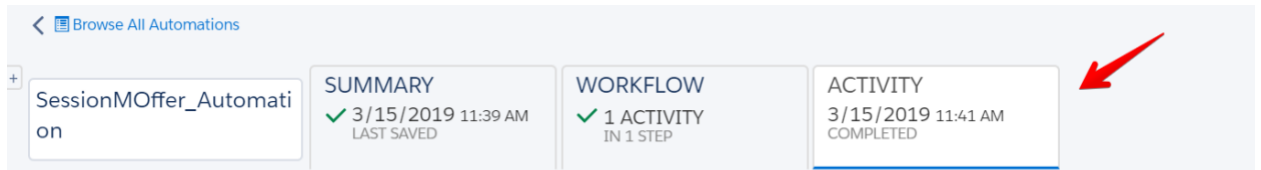
File Mapping: Map by Header Row

SOURCE	"SESSIONM_OFFERS" (DATA EXTENSION)	DATA TYPE
[Matching Header]	Offer_Order_ID	Number

### 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.



The screenshot shows a navigation bar with a back arrow and the text "Browse All Automations". Below this is a card for an automation named "SessionMOffer\_Automation". The card is divided into four sections: "SUMMARY" (3/15/2019 11:39 AM LAST SAVED), "WORKFLOW" (1 ACTIVITY IN 1 STEP), "ACTIVITY" (3/15/2019 11:41 AM COMPLETED), and a final empty section. A red arrow points to the "ACTIVITY" section.

Section	Details
SessionMOffer_Automation	
SUMMARY	✓ 3/15/2019 11:39 AM LAST SAVED
WORKFLOW	✓ 1 ACTIVITY IN 1 STEP
ACTIVITY	3/15/2019 11:41 AM COMPLETED