

SessionM Loyalty for Service Cloud Migration Guide

Version 1.x to 2.0

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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 as compensation.

Service Cloud v2.0 Enhancements

SessionM Loyalty for Service Cloud v2.0 provides the following enhancements to the Account Detail page:

- Customer Loyalty Profile
- Available Offers
- Issued Offers
- Redeemed Offers
- Expired Offers
- Reward Store
- Incentives Point Balance
- Notes
- Tier Progress
- Activity Timeline

Upgrade from 1.x to 2.0

To upgrade the package from 1.x to 2.0, complete the following steps.

1. Upgrade to the package version 1.19 using the following link.
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1I000002yGqP>

Note: Install the v.19 package before the 2.0 package for the following reasons:

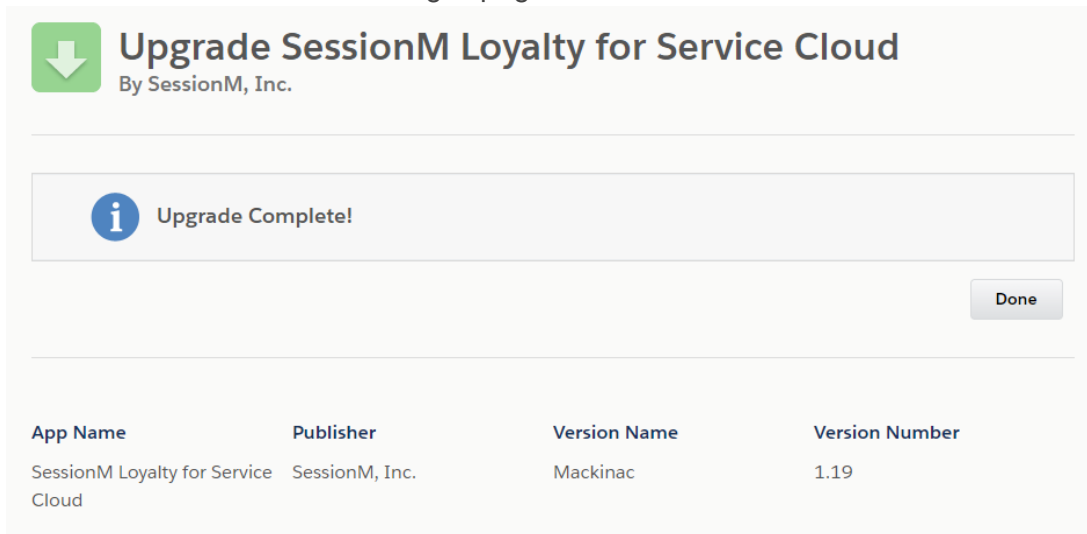
- All aura components, some visualforce pages and some other dependencies have been removed from the new package.
- To install v2.0, the dependencies from subscriber org must be removed. v1.19 removes the dependencies for deleted components and other contents.

2. Install the SessionM package v2.0.

Upgrade Process and Configurations (1.x to 2.0)

SessionM Loyalty can be installed in both production and sandbox environments. Use the production or sandbox installation URL depending upon your target environment.

1. Open the package v1.19 installation URL in your browser.
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 **Upgrade**. This ensures that only System Administrators are provided access to the package during installation. You can provide access to additional users in a later step.
4. Once the package is upgraded, click Done once the upgradation is complete. You are redirected to the Installed Packages page.



App Name	Publisher	Version Name	Version Number
SessionM Loyalty for Service Cloud	SessionM, Inc.	Mackinac	1.19


The package now appears in the list of installed packages in your organization.

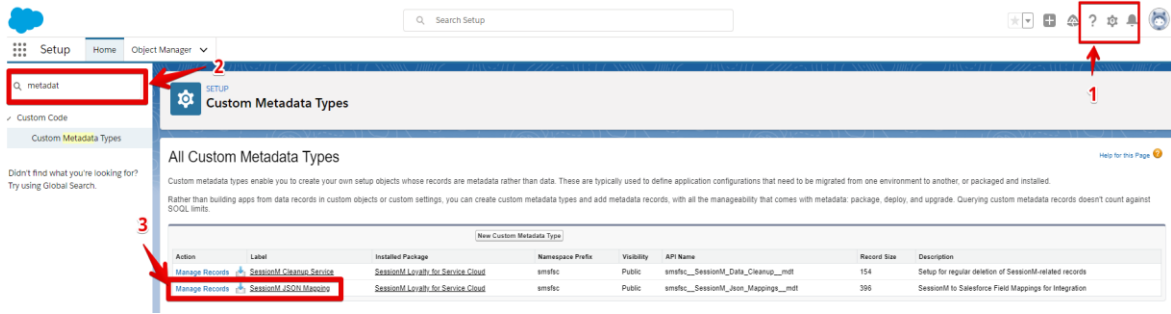
5. After upgrading to v1.19, follow the same process to upgrade to v2.0.

Make Configurations Changes

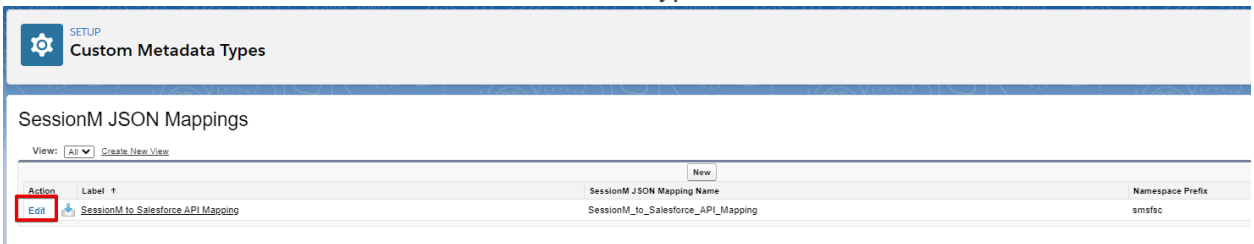
Complete the following configuration changes.

Update Metadata

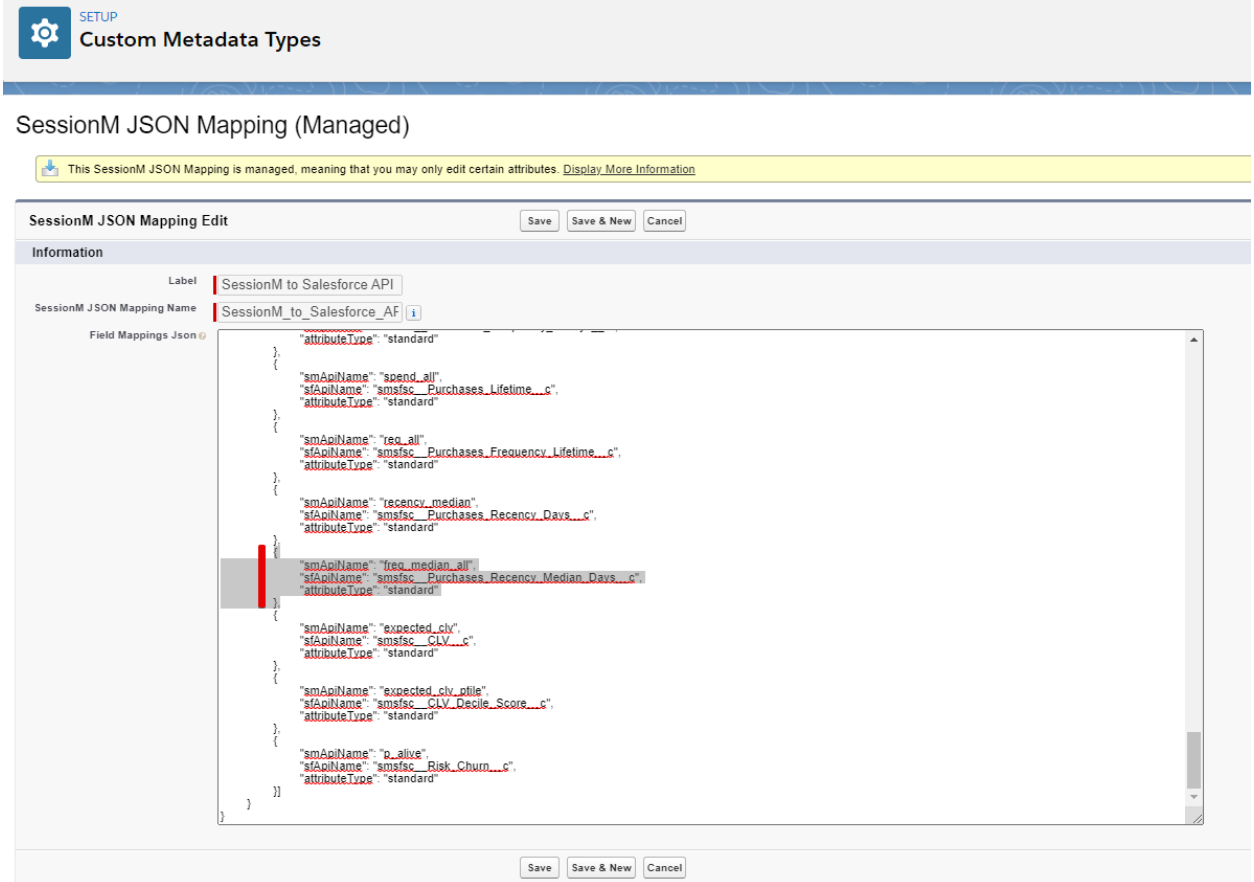
1. Click on **Setting**  on the Custom Metadata Types page.
2. Search on “metadata” in the Search box.
3. Click on **Manage Records** next to the SessionM JSON Mapping label.



4. Click **Edit** under Action on the Custom Metadata Types.

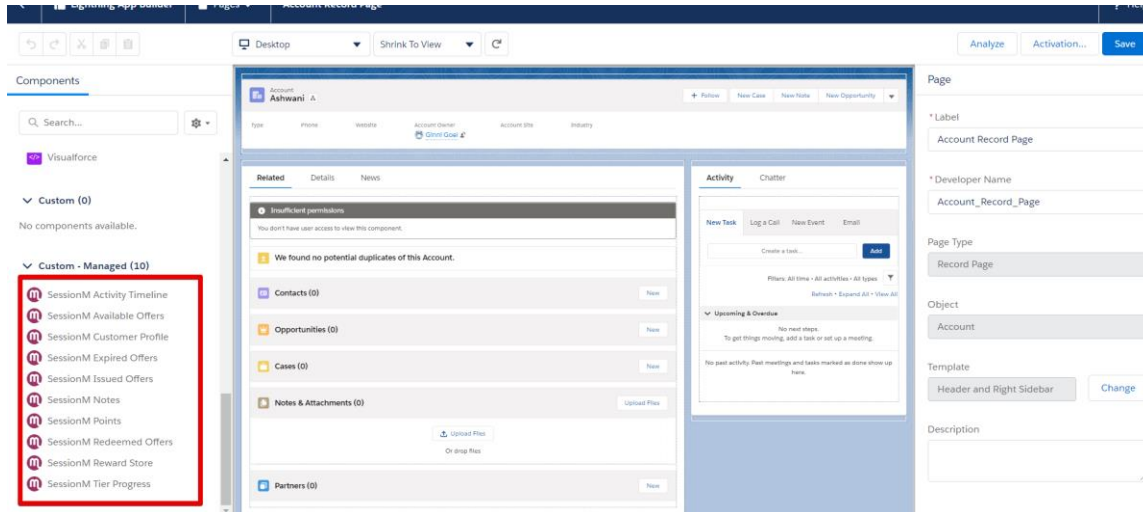


5. Remove the 'freq_median_all' field from the metadata (as shown below) and click on **Save**. Make sure there is nothing else removed SessionM JSON Mapping metadata.



Update Account Page

Add all desired SessionM components on the Account page. For more information, see the SessionM Loyalty for Service Cloud - Admin Guide v.2.0.



Deprecated Metadata

v2.0 Como was a major release with significant changes and a considerable number of metadata components was replaced by new, better ones. The following is a list of deleted metadata. Please make sure to consult this list before making any upgrades.

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
sessionmtosalesforcemapingsapiname	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