



SALESFORCE MARKETING CLOUD USE CASE

Triggering a Salesforce Journey from a SessionM Campaign

Abstract

This use case demonstrates how you can leverage rules in the SessionM Campaigns Module and SFMC Journey Trigger message type to trigger a journey in Salesforce Marketing Cloud (SFMC).

April 18 2019

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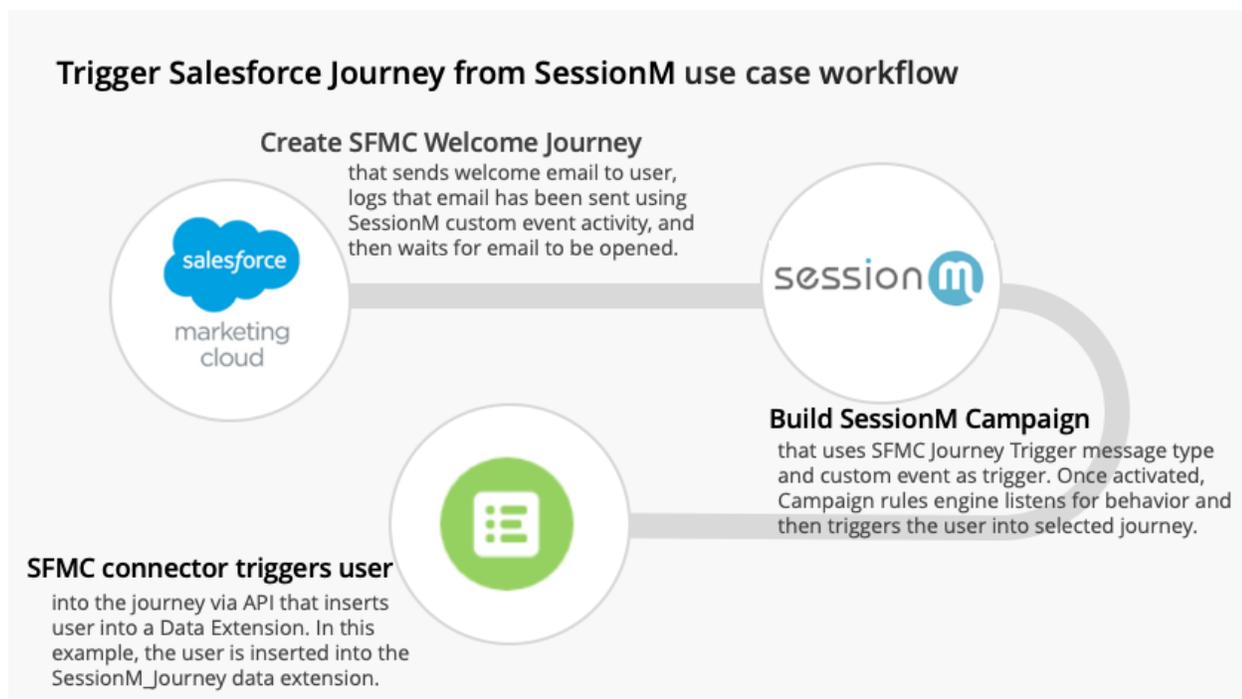
Triggering a Salesforce Journey from a SessionM Campaign

Use Case Overview

This use case demonstrates how you can leverage rules in the SessionM Campaign Module and SFMC Journey Trigger message type to trigger a journey in SFMC. The journey is invoked by an API to insert a user record into a data extension that is associated to a SFMC Journey. In this use case we create a welcome journey that leverages the SessionM_Journey data extension.

Use Case Workflow

The following image shows the workflow for triggering a journey based on customer behavior.



SessionM_Journey Data Extension

The SessionM/SFMC integration provides SFMC users with the ability to trigger SFMC journeys based on a record being inserted into a data extension. The SessionM Journey Trigger can insert records into any data extension that contains the SessionM standard profile. Additional fields can be added to the data extension as long as it contains the basic fields, but the connector will only populate the standard profile.

[Contact Builder](#)
[Data Designer](#)
[All Contacts](#)
[Data Sources](#)
[Data Extensions](#)
[Imports](#)
[Contacts Configuration](#)

[Feedback](#)
[DEV](#)
Tom Casey

[Data Extensions](#) > Sessionm JOURNEY

[Manage Policies](#)

[Properties](#)
[Records](#)

EXTERNAL KEY ?

Sessionm:JOURNEY

CREATED 09/06/2018 9:38 PM MODIFIED 09/06/2018 9:38 PM

LOCATION
Data Extensions [Change Location](#)

TYPE
Sendable

USED FOR SENDING USED FOR TESTING

Yes No [Edit](#)

SUBSCRIBER RELATIONSHIP
SessionM External ID relates to subscriber on Subscriber Key

ROOT DATA

6

Records

[Export](#)
[Import](#)

LAST REFRESHED
Never

[+ Create Attribute](#)

Name	Default Value	Length	Nullable	
ABC SessionM External ID		256	Yes	✎ ✕
@ Email		254	Yes	✎ ✕
ABC First Name			Yes	✎ ✕
ABC Last Name			Yes	✎ ✕
ABC Gender			Yes	✎ ✕

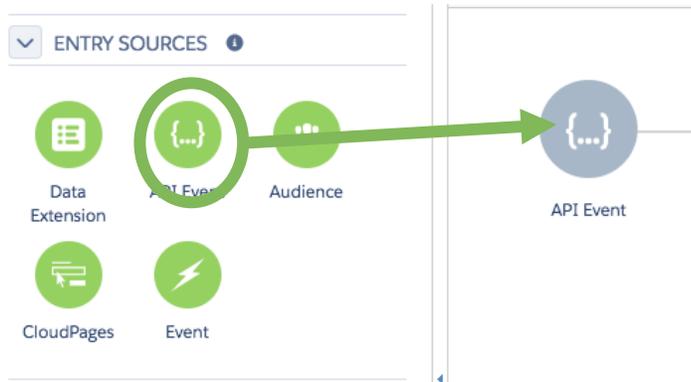
SessionM_Journey Required Fields

- SessionM External ID
- First Name
- Last Name
- Gender
- DOB
- Account Status
- Postal Code
- Country
- Identifiers
- Phone Number
- Email

Create Welcome Journey in SFMC

In this journey we demonstrate how to trigger a welcome journey using the SessionM Trigger Journey message type and the SessionM_Journey Data Extension. The journey sends a welcome email to the user, logs that the email has been sent using the SessionM custom event activity, and then waits for the email to be opened.

1. In Journey Builder create a new journey. Under “Entry Sources” drag the API Event onto the canvas.



2. Click on the API Event to configure it. Then choose **API Event** and click **Next**.

Define Entry Source

New Entry Sources



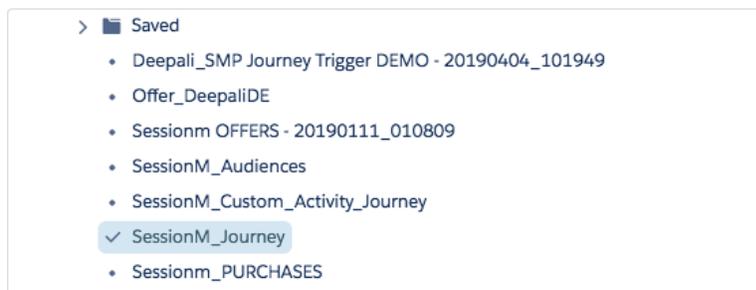
3. Select the **SessionM Journey** data extension, click **Next** and then **Done**.

Define Entry Source



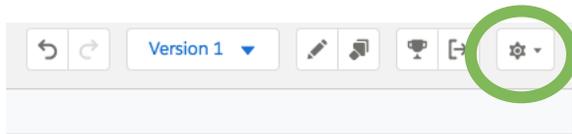
Select the DE or file below where your data will be stored when an entry event occurs.

ENTRY AUDIENCE

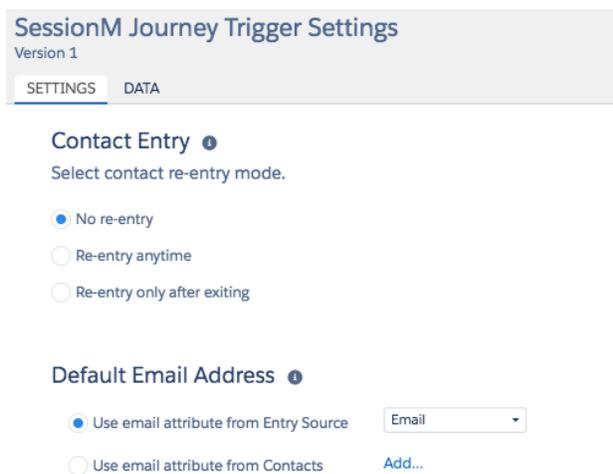


- 5 SessionM Salesforce Marketing Cloud Use Case:
Triggering a Salesforce Journey from SessionM Campaign
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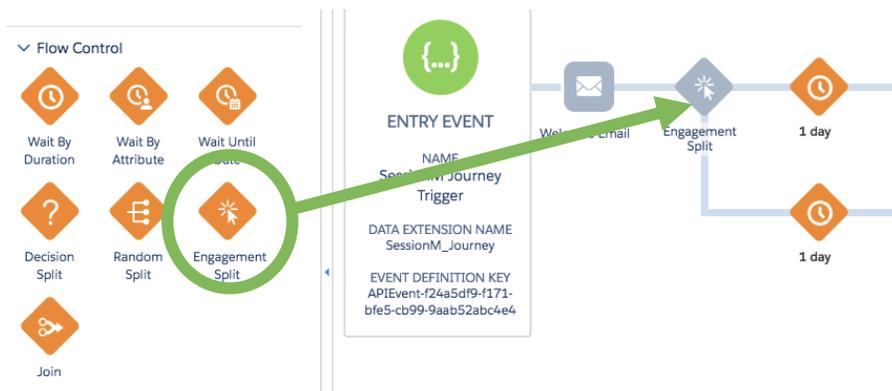
4. Edit the journey settings.



5. Under **Contact Entry**, set the **Re-entry mode**, which controls how many times a user can enter this journey. Since this is a welcome journey, we only want the user to enter once and so choose **“No Re-entry”**. If you want a user to be able to enter the journey more than once (for example, to send a thank you message after purchase), then choose **“Re-entry anytime”**.



6. Next add an **Engagement Split** activity to route the user based on whether they open the email.



7. Click on the **Engagement Split** activity. In this example, the user is routed based on whether they open the email sent earlier in the journey.

Engagement Split Summary

Message to Monitor

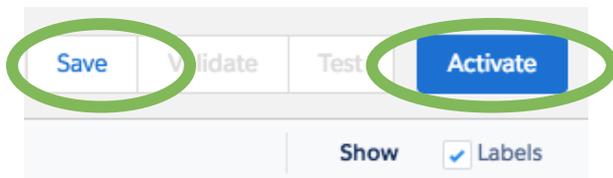
SessionM SF Demo 10% Off

MESSAGE PROPERTIES
 Created By: Kelth Felker
 Last Modified: 10/18/2018
 Folder Location: Content Builder

Message Metrics

Opens
 Recipients that open the message proceed on the Yes path.

8. Click **Save** and then **Activate** the journey.



Build SessionM Campaign

Build a SessionM campaign that uses the **SFMC Journey Trigger** message type and a custom event to as the trigger. Once activated, the Campaign rules engine listens for this behavior and then triggers the user into the selected journey.

1. Navigate to the Campaigns Module in the SessionM platform.

Campaigns & Content

Creative Templates
 Build and manage templates for use within Campaigns.

Campaigns
 Create messaging campaigns & promotions to drive high valued behaviors.

2. On the Campaigns dashboard, click the **Create Campaign** button.

All Campaigns (97 Campaigns)

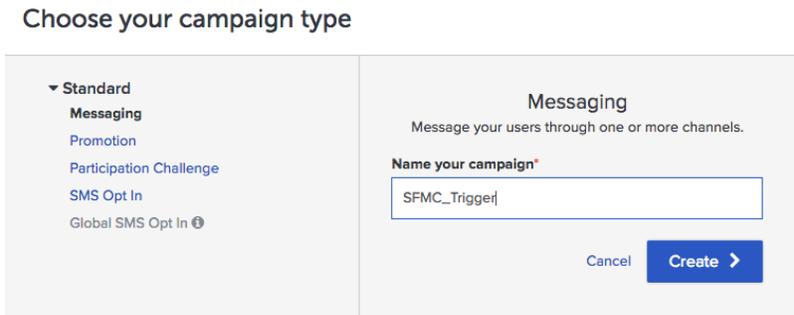
Search

Manage **Calendar**

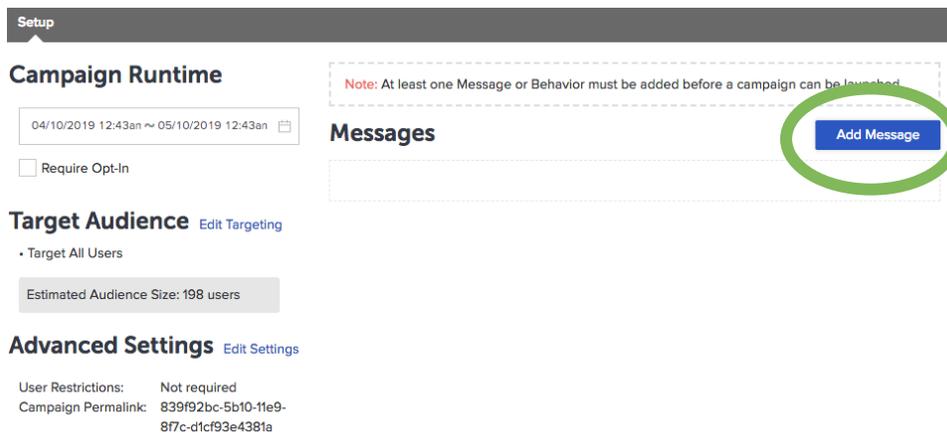
Filter By: Status [Manage Columns](#)

ID	Campaign Name	Type	Starts	Ends	Owner	Audience	Status
----	---------------	------	--------	------	-------	----------	--------

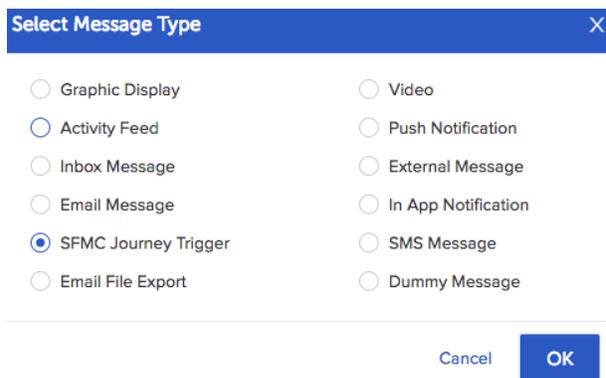
3. Select the **Messaging** campaign type and enter a campaign name and click **Create**.



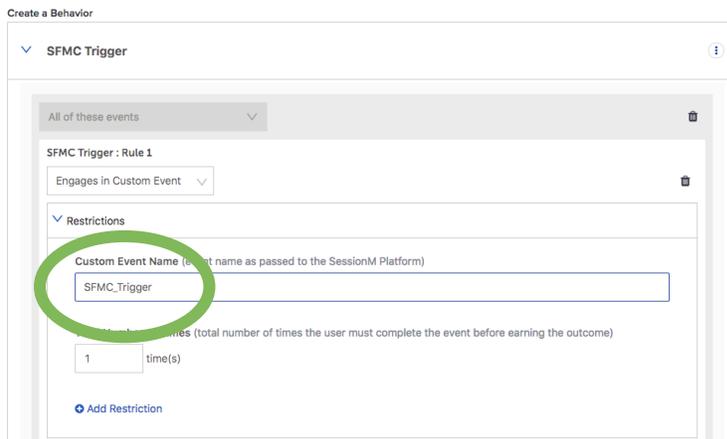
4. Under Messages click the **Add Message**.



5. Click on the **SFMC Journey Trigger** message type.



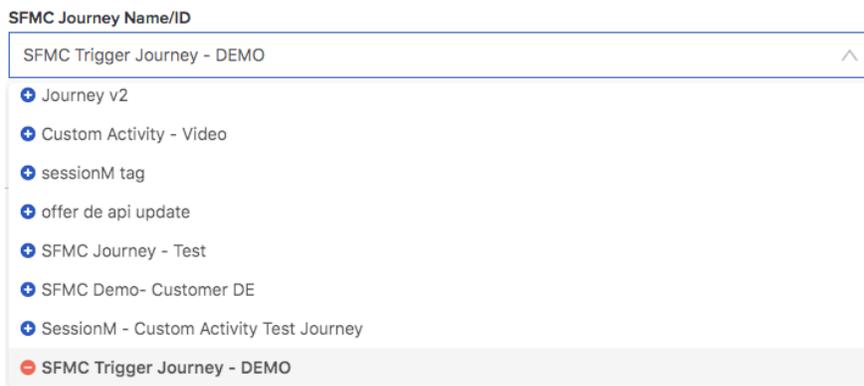
6. Under the behavior builder, enter a Behavior Name of **"SFMC Trigger"** for this example. Next, set up a Custom Event Name. For this example, use custom event name **"SFMC_Trigger"**. Click **Save**.



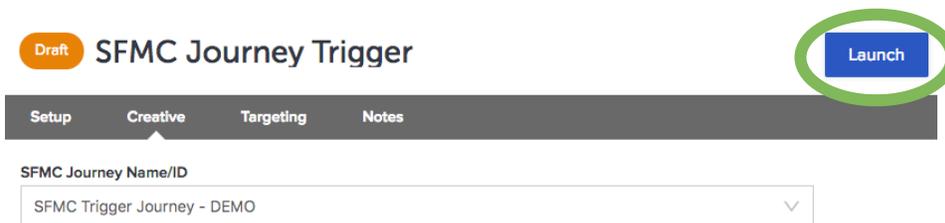
7. Click the **Creative** tab.



8. Select an active Journey from the **SFMC Journey Name/ID**, then click the **Save** button.



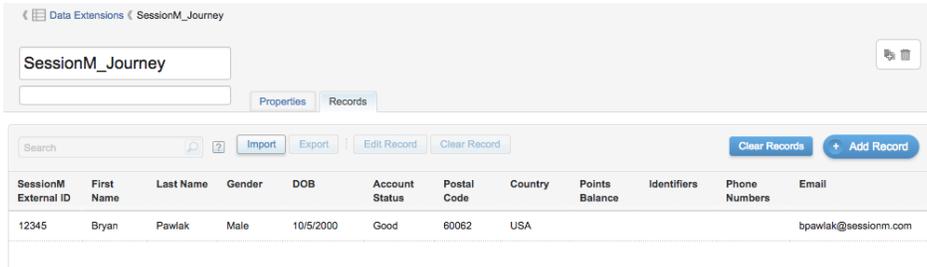
9. On the Campaigns Setup page, click the **Launch** button to activate the campaign.



Once activated, the Campaign rules engine listens for this behaviour and then triggers the user into the selected journey.

SFMC Connector Triggers the Journey via API

The SFMC connector triggers a user into the journey via API. That API then inserts a user into a Data Extension. In this example, the user is inserted into the **SessionM_Journey** data extension.



The screenshot shows the Salesforce interface for a Data Extension named 'SessionM_Journey'. The interface includes a search bar, tabs for 'Properties' and 'Records', and a table of records. The table has columns for SessionM External ID, First Name, Last Name, Gender, DOB, Account Status, Postal Code, Country, Points Balance, Identifiers, Phone Numbers, and Email. One record is visible with the following data:

SessionM External ID	First Name	Last Name	Gender	DOB	Account Status	Postal Code	Country	Points Balance	Identifiers	Phone Numbers	Email
12345	Bryan	Pawlak	Male	10/5/2000	Good	60062	USA				bpawlak@sessionm.com