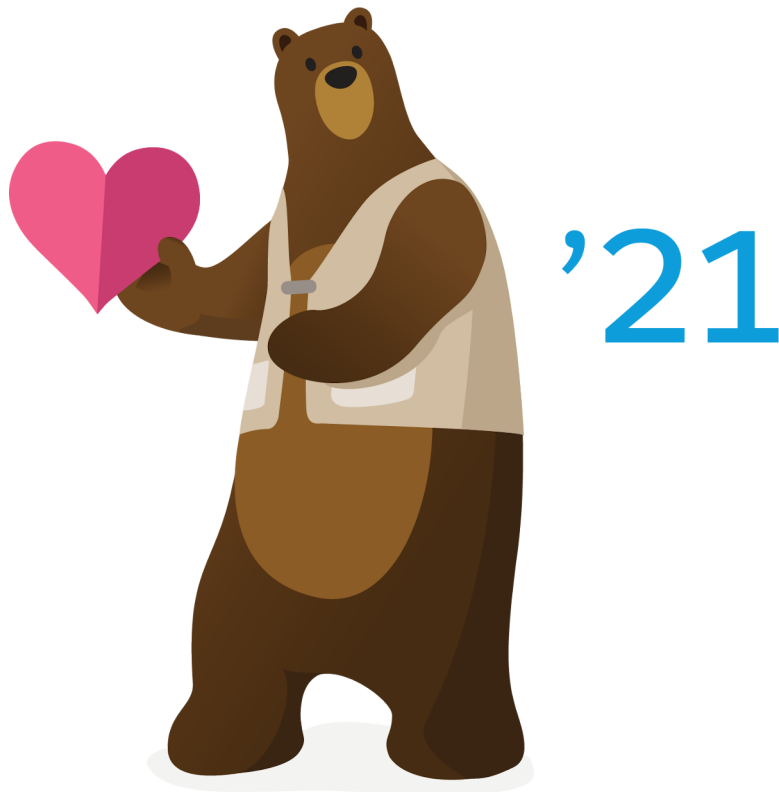




Keep Customers in the Loop with Transactional Email

Salesforce, Spring '21



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KEEP CUSTOMERS IN THE LOOP WITH TRANSACTIONAL EMAIL

Inform customers on the status of their orders through email while reducing call volume to your service centers. Increase storefront visits.



Get Started



Explore system architecture related to this solution.

- [B2C Industry Blueprint](#)
- [B2C Reference Architecture](#)
- [B2C Solution Architectures](#)



Take Trailhead modules related to this solution.

- [Salesforce Solution Kits: Quick Look](#)
- [Customer 360 Guide for Retail: Quick Look](#)
- [Customer 360 Guides: Quick Look](#)

This solution kit helps you:

- Build trust with your shoppers.
- Keep shoppers informed and reassured.
- Inform shoppers when their orders are in process and complete.
- Let shoppers track their purchase from order to delivery.
- Increase storefront visits.
- Give your shoppers a personalized experience when you connect Commerce Cloud and Marketing Cloud.

Required Products

- Commerce Cloud ([SFRA](#) or [SiteGenesis](#))
- Marketing Cloud (Journey Builder and Email Studio)

Implement This Solution

Transactional Email Solution Workflow

Learn how data flows through the configurations to keep customers in the loop with transactional email.

Design Considerations

Keep these design considerations in mind when you keep customers in the loop with transactional email.

Connector

Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Marketing Cloud Connector for B2C Commerce to keep customers in the loop with transactional email.

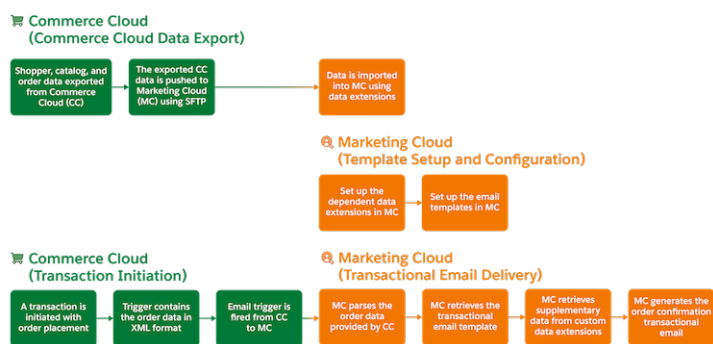
Configurations

Use these configurations to keep customers in the loop with transactional email.

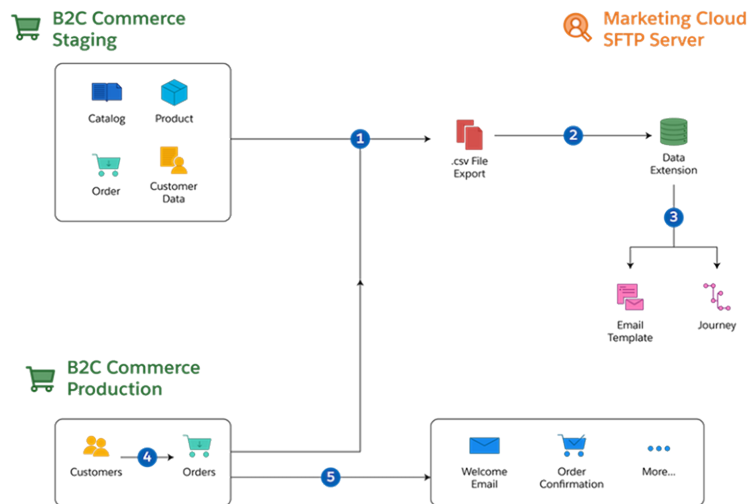
Transactional Email Solution Workflow

Learn how data flows through the configurations to keep customers in the loop with transactional email.

Workflow



Understand the Flow of Data



1. Collect the catalog, product, order, and customer [data feeds](#) from the B2C Commerce staging and production environments.
2. Move the data to the [Marketing Cloud SFTP server](#) so that Marketing Cloud consumes it on a schedule.
3. Use Commerce Cloud data in Marketing Cloud via data extensions during the authoring of email templates, creation of journeys, and development of personalized product recommendations.
4. Extend the Commerce Cloud storefront by replacing its email functions with the Marketing Cloud Connector's trigger-send features.
5. Implement Marketing Cloud Connector customizations to trigger [transactional email](#) for common scenarios. These scenarios include Welcome Email, Order Confirmation, and Order Status Update Email.

Functionality Considerations

- The configuration moves email authoring to the Marketing Cloud Email Studio. Avoid using Commerce Cloud storefront templates to generate and deliver transactional email.
- Enable transactional email delivery triggered in Commerce Cloud and generated in Marketing Cloud.
- The configuration delivers Commerce Cloud-driven [data feeds](#) to Marketing Cloud using SFTP (customers, catalogs, and orders).
- Inform email content and product recommendations using [data feeds](#) that Marketing Cloud consumes.
- Using Commerce Cloud data with Audience Builder can require a services engagement with an Audience Builder expert.

Performance Considerations

- To support your expected data volume, architect Commerce Cloud data feed consumption by Marketing Cloud.
- Extend Commerce Cloud data feeds to include other data sets necessary to implement custom use cases.
- Follow Marketing Cloud data extension best practices. All Commerce Cloud data that Marketing Cloud imports resides in data extensions.

Related Content



Review this solution's use case and purpose.

- [Keep Customers in the Loop with Transactional Email](#) on page 1



Take the next steps in this implementation.

- [Design Considerations](#)
- [Connector](#)
- [Configurations](#)

Design Considerations

Keep these design considerations in mind when you keep customers in the loop with transactional email.

Catalogs

- [Streaming updates](#) isn't efficient for large numbers of product SKUs.
- Language, currency, multi-brand support, and inventory affect the catalog feed model.
- Languages, currencies, and brands supported in the storefront impact the catalog feed model.
- [Extend all Commerce Cloud data feeds](#) to include every locale, currency, and brand in a given implementation.

Data Extensions

- The order confirmation email template uses the supplemental data extension [ShippingMethods](#) to retrieve labels and descriptions for shipping methods used by an order.
- Seed this data extension with all supported Commerce Cloud storefront shipping methods.

Triggers for Order Confirmation

- Replace your legacy email delivery logic for order confirmation with the Marketing Cloud Connector hook implementation.
- Include the order details for the confirmation email in the hook message used to invoke the Marketing Cloud trigger.

Related Content



Review earlier steps in this solution.

- [Transactional Email Solution Workflow](#)



Take the next steps in this implementation.

- [Connector](#)
- [Configurations](#)

See Also

Configuration B2C Marketing

- [B2C Custom Hooks Overview](#)
- [B2C Order.xsd Salesforce XML Schema](#)
- [B2C Marketing Cloud Connector: Connector Documentation](#)
- [B2C Marketing Cloud Connector: Connector Overview](#)

Email, Marketing, and Streaming

- [Einstein Email Recommendations](#)
- [Marketing Cloud SFTP Guide](#)
- [Stream Catalog Updates Through Collect Tracking Code](#)
- [XChange Marketing Cloud Connector: Developer Forum](#)

Connector

Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Marketing Cloud Connector for B2C Commerce to keep customers in the loop with transactional email.

The [Marketing Cloud Connector](#) for B2C Commerce facilitates the platform customizations necessary to integrate Commerce Cloud and Marketing Cloud.

Before implementing the connector, consider conducting an environmental audit with a Marketing Cloud representative to confirm that you meet the prerequisites for the use case. Also, keep in mind that triggers for Personalization Builder require a [paid services engagement](#) performed by Marketing Cloud Professional Services for every abandonment scenario and business unit combination.

Before implementing the configurations, sign in to GitHub and set up the Marketing Cloud Connector using the [GitHub repository wiki instructions](#). Are you a Commerce Cloud customer or partner and don't have access to the GitHub repository? If you have access to Xchange, you can get access to Github via this [XChange article](#).

 **Note:** For access to Salesforce B2C Commerce XChange content, talk to your Success Manager.

General Information About Connectors

- Connectors are developer-enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.
- Connectors support a core set of use cases that you can extend to support other customer-driven use cases.
- Connectors require customization and configuration in Marketing Cloud and B2C Commerce Cloud. The Commerce Cloud storefront requires customization as part of the connector integration.
- Implementation and validation require operational and administrative experience with Marketing Cloud.
- Plan your connector implementation as you would any other B2C Commerce Cloud feature by collecting requirements, capturing work tasks, and making task estimates.

What Your Company Can Do with This Connector

- Accelerate integration time to market for Commerce Cloud and Marketing Cloud
- Simplify and centralize email authoring and content management
- Trigger transactional email from Marketing Cloud through Commerce Cloud
- Track email performance using Marketing Cloud Analytics
- Improve marketing agility, efficiency, and campaign performance
- Personalize engagement based on past purchases and shopper interactions
- Connect Commerce Cloud and Marketing Cloud using REST APIs
- Enable one-way sharing of customer, catalog, and order data from B2C Commerce Cloud to Marketing Cloud

Related Content



Review earlier steps in this solution.

- [Transactional Email Solution Workflow](#)
- [Design Considerations](#)



Take the next steps in this implementation.

- [Configurations](#)

Configurations

Use these configurations to keep customers in the loop with transactional email.

Set Up SFTP in Marketing Cloud

- SFTP integrates the customer, catalog, content, and order data feeds from Commerce Cloud.
- Set up multiple export processes to support these and other Commerce Cloud data sets.
- Commerce Cloud data sets persist in Marketing Cloud through data extensions.
- For retailers, configure the data feeds in Commerce Cloud to deliver data to Marketing Cloud during periods of low traffic.

Configure Product Catalog Import in Marketing Cloud

- To ensure that the products represented in marketing communications align with your catalog definitions, regularly import the storefront catalog.
- Generate product recommendations from your catalogs.

Configure Email Templates in Marketing Cloud

Configure email templates to use Commerce Cloud data for each supported template type.

Set Up Triggers in Commerce Cloud

- Customize the storefront and replace B2C Commerce Cloud generated order confirmation logic with the [triggered Send API](#) call to Marketing Cloud (following the connector standards).
- [Implement SFRA](#).
- [Implement SiteGenesis](#).

Configure Email Templates

- The Marketing Cloud Connector supports [multiple transactional email templates](#) beyond the order confirmation and status use-cases.
- Extend email templates to use product recommendations that Marketing Cloud Einstein generates.
- For more information on setting up personalized recommendations in email templates, review the [Personalized Marketing Recommendation Solution Kit](#).

Related Content



Review earlier steps in this solution.

- [Transactional Email Solution Workflow](#)

- [Design Considerations](#)
- [Connector](#)