Keep Customers in the Loop with Transactional Email

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CONTENTS

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.

Integration Reference Implementation

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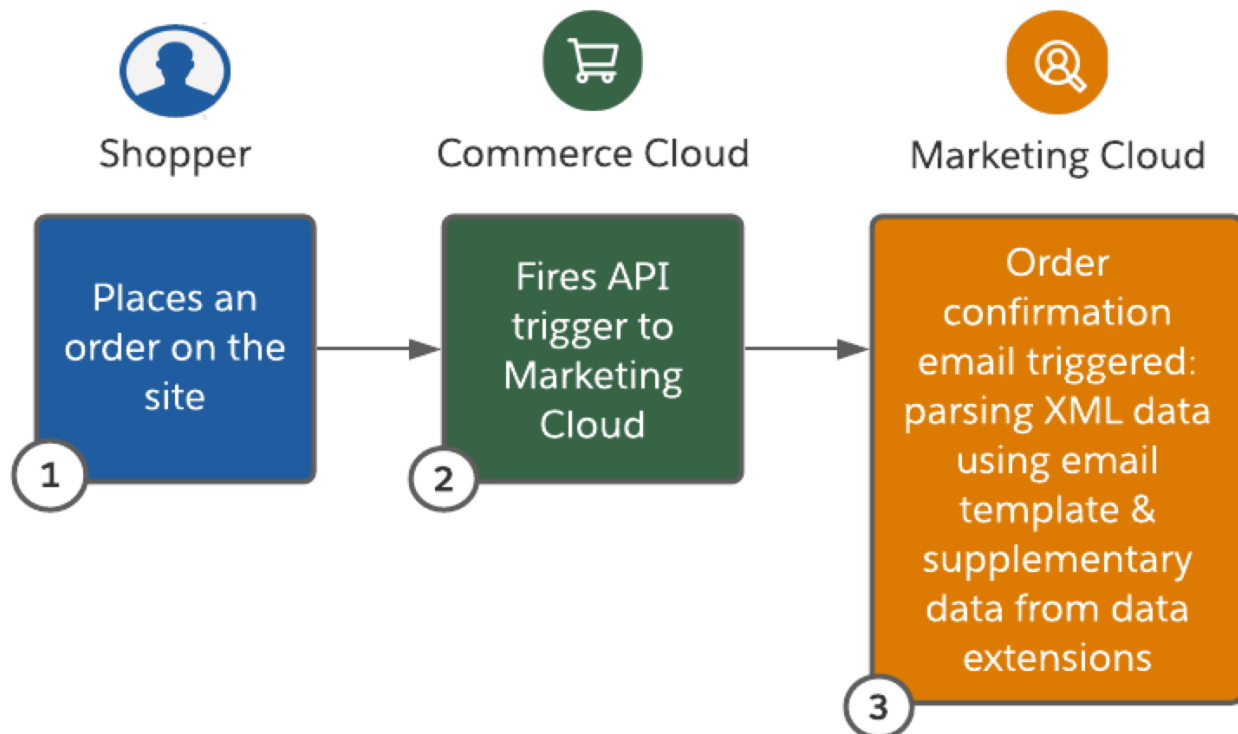
Configurations

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

1. The shopper places an order on the site.
2. Commerce Cloud triggers an API to Marketing Cloud that contains the order data in XML format.

3. Marketing Cloud generates the order confirmation email using the transactional email template while parsing the XML data and supplementary data from custom data extensions.

Understand the Flow of Data
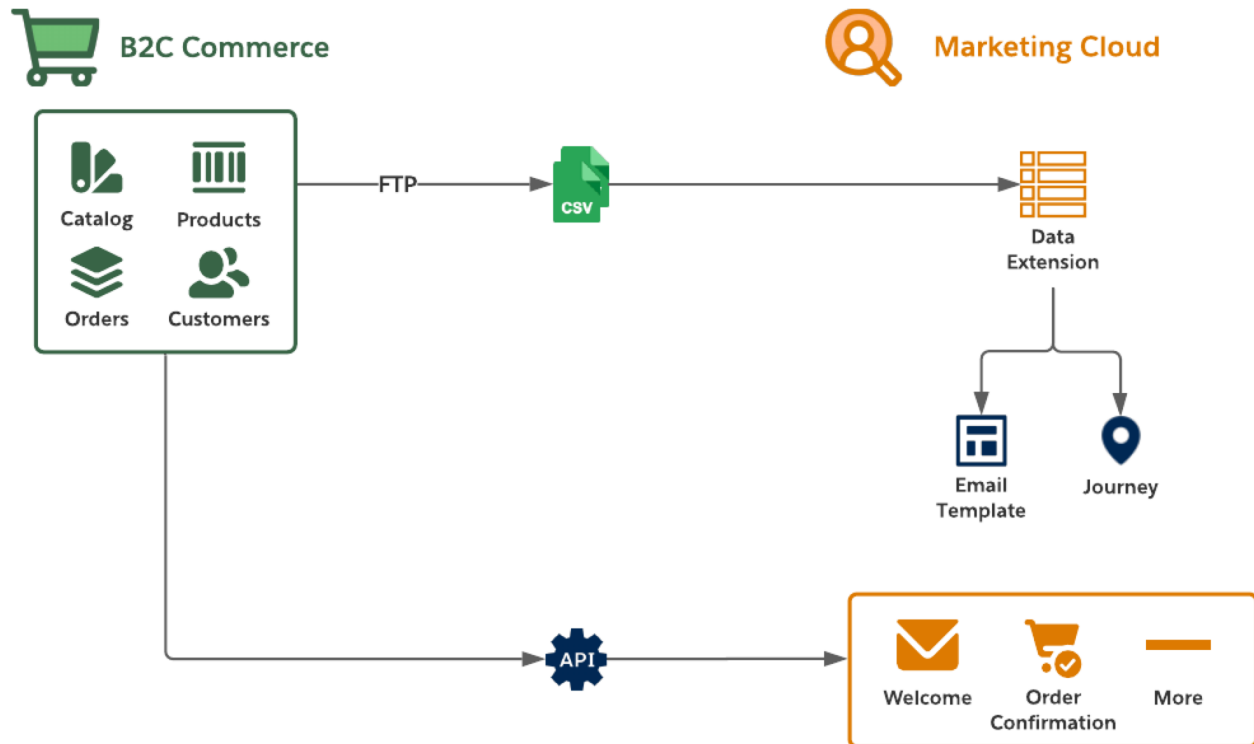
1. Collect the catalog, product, order, and customer data feeds from the B2C Commerce staging and production environments.

2. Move the data to the Marketing Cloud SFTP server and create import activities so that Marketing Cloud consumes it on a schedule via Automation Studio.

3. Use B2C Commerce 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 B2C Commerce storefront by replacing its email functions with the Marketing Cloud's trigger-send features.

5. Use the Marketing Cloud reference implementation customizations to trigger transactional email for common scenarios. These scenarios include Welcome Email, Order Confirmation, and Order Status Update Email.

Functionality Considerations

- The reference implementation enables email authoring using Marketing Cloud's Email Studio, rather than the developer storefront template model supported by B2C Commerce Enterprise.

- The reference implementation enables B2C Commerce to trigger Marketing Cloud to generate transactional email delivery.

- The reference implementation supports delivery of B2C Commerce-driven data feeds to Marketing Cloud through SFTP (customers, catalogs, and orders).

- Use data feeds that Marketing Cloud consumes to shape email content, including storefront product recommendations.

Performance Considerations

- Plan your Commerce Cloud data feed consumption to support expected volume and Marketing Cloud use cases.

- Limit data imported via the connector feed framework to 1 million rows per import. If your data volume exceeds 1 million rows, consider multiple imports.
- Use data extensions to import data into Marketing Cloud for personalization or segmentation.
- Avoid importing data into Marketing Cloud for "pre-processing" or "data-lake" activities.

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
- Integration Reference Implementation
- 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.
- Extend the catalog feed model to support multiple languages, brands, and currencies.

Data Extensions

- Follow best practices for creating data extensions. To ensure that your data is efficiently stored and quickly retrieved, choose the correct data field types. Set appropriate field lengths. When no other option is available, use unbounded columns whose field lengths aren't set. Limit the total number of field lengths in a data extension to less than 4000 total characters.
- The order confirmation email template uses the supplemental data extension ShippingMethods to retrieve labels and descriptions for shipping methods. 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 reference 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.

- Integration Reference Implementation

- Configurations

See Also

Configuration B2C Marketing

- B2C Custom Hooks Overview
- B2C Order.xsd Salesforce XML Schema
- B2C Marketing Cloud Reference Implementation: Documentation
- B2C Marketing Cloud Reference Implementation: Overview

Email, Marketing, and Streaming

- Einstein Email Recommendations
- Marketing Cloud SFTP Guide
- Stream Catalog Updates Through Collect Tracking Code

Integration Reference Implementation

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

After you sign in to GitHub, the Marketing Cloud reference implementation for B2C Commerce facilitates the platform customizations necessary to integrate Commerce Cloud and Marketing Cloud.

Before implementing, consider conducting an environmental audit with a Marketing Cloud representative to confirm that you meet the prerequisites for the use case.

Before implementing the configurations, sign in to GitHub and set up the Marketing Cloud reference implementation using the GitHub repository wiki instructions. Get started with Commerce API.

General Information About Reference Implementations

- Reference implementations are developer-enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.
- Reference implementations support a core set of use cases that you can extend to support other customer-driven use cases.
- Reference implementations require customization and configuration in Marketing Cloud and B2C Commerce Cloud. The Commerce Cloud storefront requires customization as part of the integration.
- Implementation and validation require operational and administrative experience with Marketing Cloud.
- Plan your 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 Reference Implementation

- 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.
- The Marketing Cloud reference implementation 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.

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. Follow the reference implementation standards.
- Implement SFRA.
- Implement SiteGenesis.

Related Content

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- Integration Reference Implementation