Customer.io(Trigger Based Email/SMS)

Overview Exaplanation

The purpose of customer.io is to take events and customers from SMRT and translate that into actions. This can range from Email/SMS broadcasts to trigger-based campaigns.

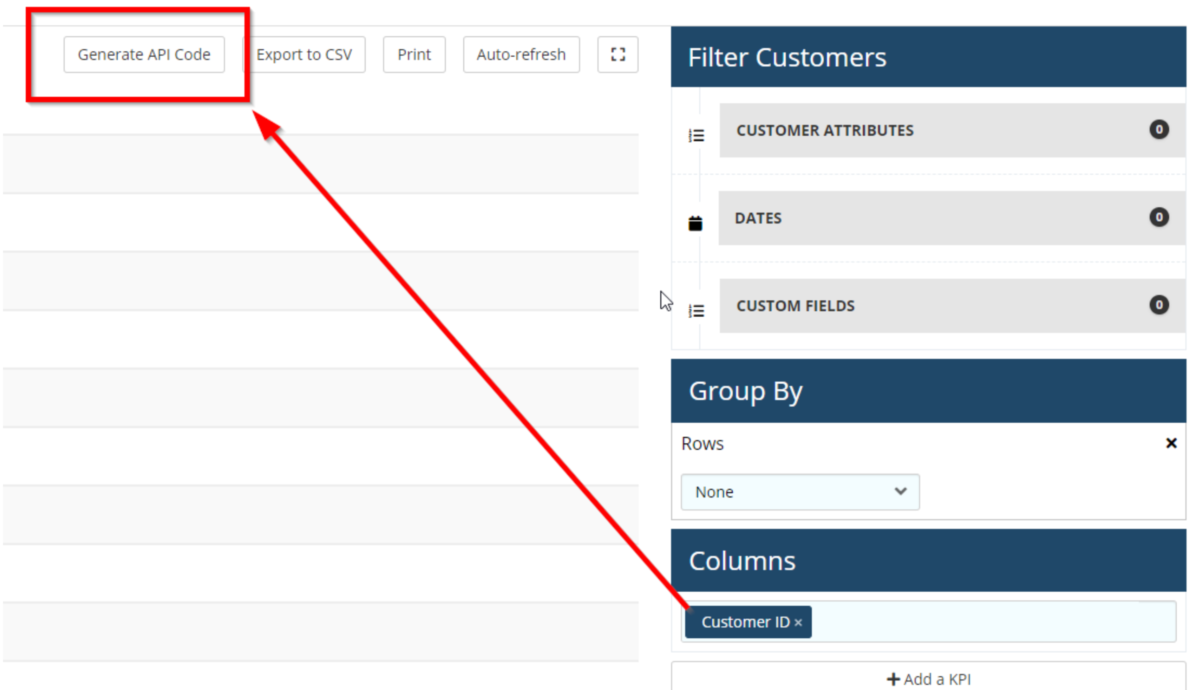
There are 2 different types of campaigns that we do. Trigger-based, and segment based.

Inside the campaigns

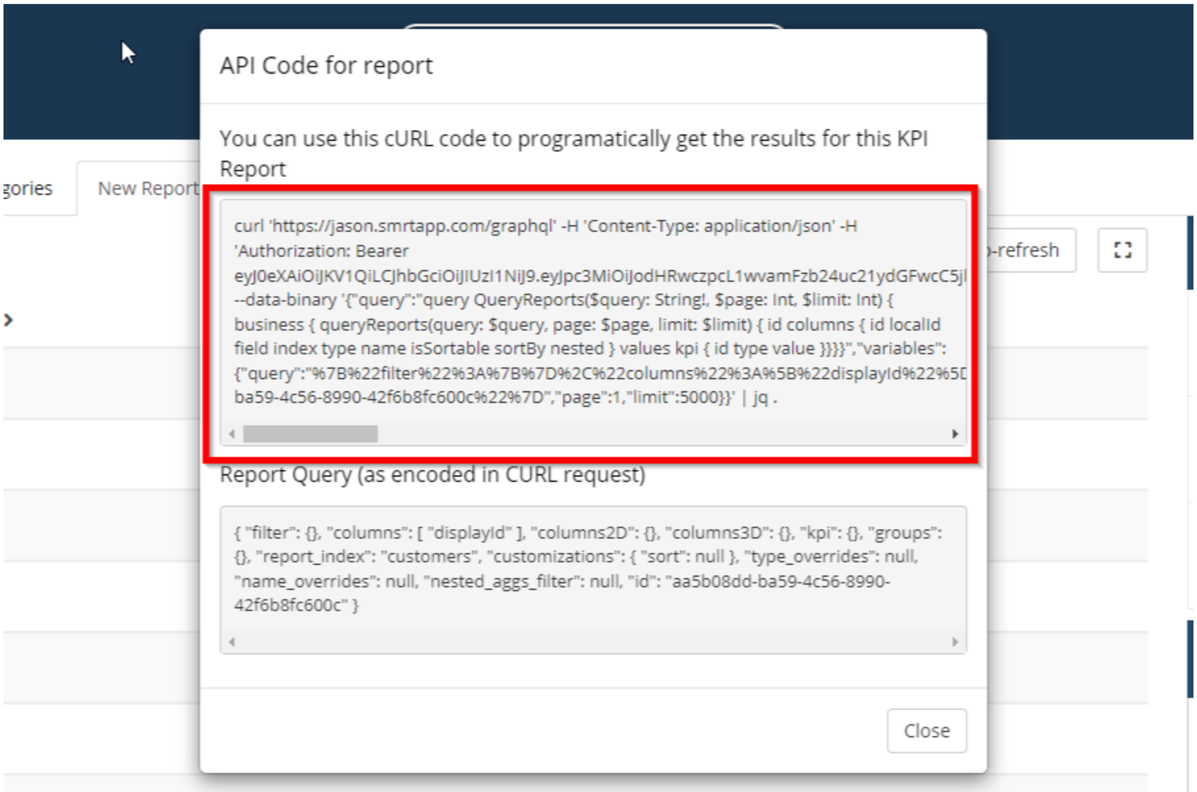
- Inside most of the campaigns, we use a variety of actions.
    - Sleeps
    - Webhooks
        - Post Address
            - 99% of the time this will be the instance hostname(https://panton.smrtapp.com/graphql)
        - Authorization Header(API key)
        - Query
            - Whatever you're trying to query for
        - Response
            - This is for formatting the response so we can get the value or values that we need.
    - Branches
    - Wait Until
    - Emails/SMS

General Setup

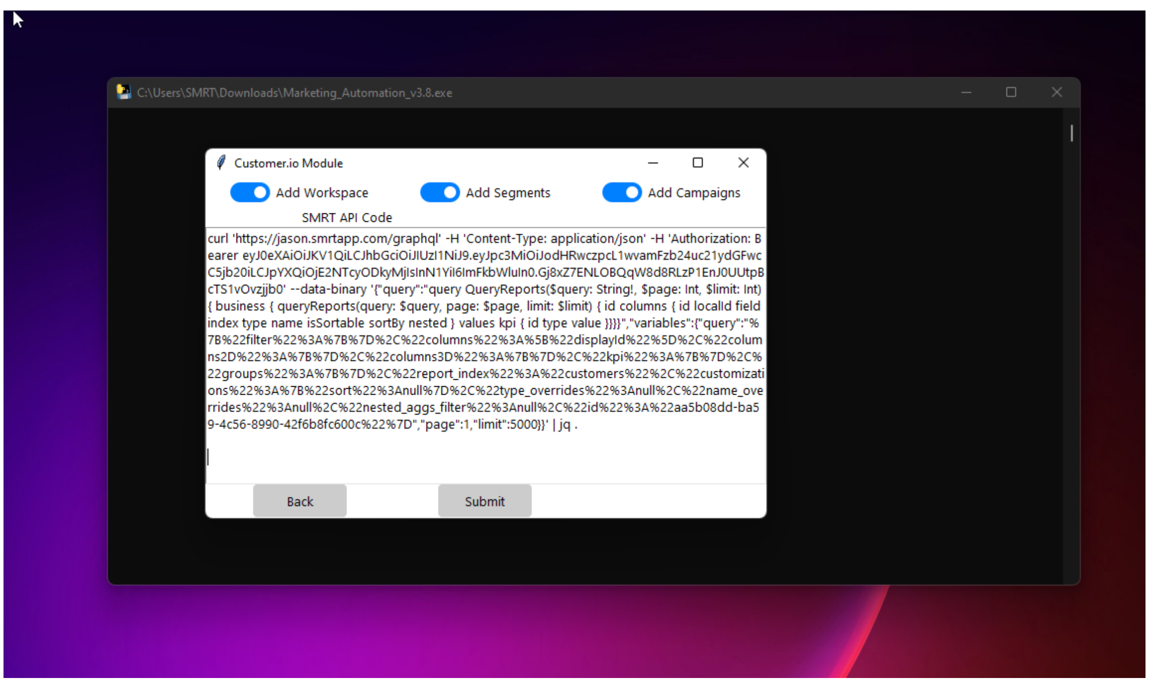
1. Run automation tool, This can be located in the Marketing Setup Files Drive https://drive.google.com/drive/folders/1CKbG2h6so6cjjJEIlh3H7eQzXKFtpGep?usp=sharing
    a. Select Customer.io Module from the Automation
    b. Log into the Customer SMRT instance and create a Customer KPI report. Add any column to the report to show the API Code Button



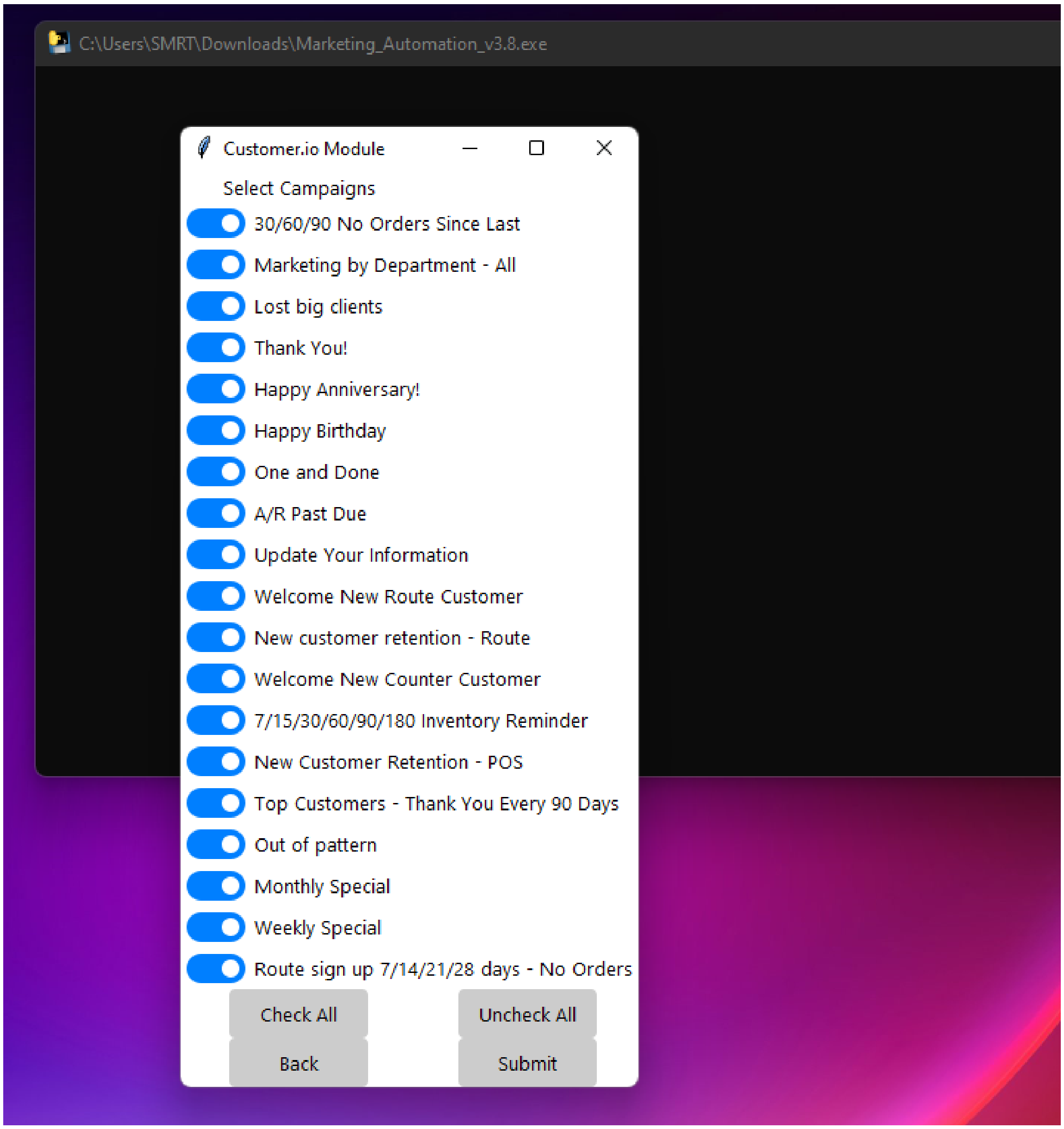
c. Copy API Code from the top box. You will need to close and reopen the code once or twice to remove the expiration on the API key



d. Paste the API Code into the Marketing Automation for Customer.io. If there is already a Workspace, Segment, or Campaigns added for the customer you can check what needs to be added.



1. If you are uploading the campaigns again due to an error do not recreate the workspace unless you have deleted it from Customer.io
2. Select Campaigns that need to be added to the workspace.



2. Enter Settings > Workspace Settings > Email to connect sending domain
   a. Sending domain is the SMRT instance Web Address “CLEANERINSANCENAME.smrtapp.com” does not need www or any thing

else.

b. Enter “Company Name” for the Display Name
c. Enter “Contact” for the email address
d. Click add Domain
e. Repeat steps a-d but this time in step a use the business's website and for step c use “marketing” for email address

3. Once the Domain has been created you will be provided with the MX, SPF, and DKIM Records.
    a. These will be saved to be provided to the customer later so that they can add them to their Website Domain Provider.