

Segment(Pipeline)

- Segment is the pipeline from SMRT to customer.io and Birdeye
- It is **required** if you're setting up customer.io or Birdeye
- 2 Different types of events
 - Track Event - These events are basically actions that occurred. Ex. "New Sign Up"
 - Identify Event - This is identifying a customer. Usually occurs after a track event that affects customer information

General Setup

1. From the main segment page scroll to the bottom and select "New Workspace"
2. Enter Company Name into the NICKNAME field
3. Slug will be generated, Copy this to a separate doc for later use.
4. Add Billing Email
5. Continue through pop-up pages. Continue to Workspace > Other > Next Step
6. From Connections
 - a. click on Sources > add New Source > Javascript > Add Source
 - b. Lable Name as "SMRT" > Click on Add Source.
7. Return to Connections
 - a. Click on Destinations > Add Destination
 - b. Filter Customer.io > Select Module
 - c. Click Configure Customer.io
 - d. Select SMRT Source Data
 - e. Enter Destination Name as "Customer.io" and Save

- f. Add Site ID and API Key from Customer.io Located in Settings > Account Settings > API Credentials on the left side menu
 - g. Enable Destination
 - h. Save Changes
- 8. Return to Connections
 - a. Click on Destinations > Add Destination > Functions
 - b. Create Function
 - c. Select Destination > Build
 - d. Copy Reviews2SegmentCode.txt from Marketing Setup Drive and replace the Source function in Segment
 - e. Click Configure
 - f. Name Configure SMRT Reviews and click Create Function
 - g. When Prompted to Click Connect Source
 - h. Click Continue
 - i. Enable Destination
 - j. Save Changes
- 9. Gather API Key from Source to add to SMRT
 - a. Click on Connections > SMRT(three dots) > Debugger > Settings > API Key
 - b. Copy the Write Key located in the API keys.
 - c. Enter the customer's SMRT instance.
 - d. Settings > Business settings > Segment Integration
 - e. You will be asked to update the API key or Link.
 - i. If you are updating the API key, verify first that the client will be using our Segment account and not one they have personally.
 - ii. If you are asked to just Link the API Key proceed with linking

Calculating MTU's

For Segment to work we need to allocate MTUs (Monthly Tracked Users) to a workspace. We pull 30 days worth of identify events(customers) so we need to allocate enough to handle that amount and the monthly average of new customers.

You just need to make 2 different KPI's

- Last Visit - last 30 days. This is to identify how many active customers they have
- New Sign Up Last Month - This is used to calculate how many new customer usually signup