Explore Salesforce Solution Kits

Last Updated:2026.02.25

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Explore Salesforce Solution Kits

Salesforce solution kits are recommended solutions that help solve common, cross-product, or cross-cloud business use cases.

Solution Kit	Products	Links
Collect Health Verifications to Return to Work Verify your employees' COVID-19 health status to ensure safety when returning to the workplace.	• Work.com, Sales Cloud, Service Cloud, or Salesforce Industries Cloud • Experience Cloud (Optional)	View Now
Create a Custom Preference Center Improve your customer relationships by synchronizing the Salesforce core Individual object with the Marketing Cloud profile center and subscription center.	• Marketing Cloud (all editions) • Salesforce Lightning Platform (Sales, Service, or B2B)	View Now
Manage Vaccine Communications with Marketing Cloud Use Marketing Cloud to deliver timely communications about registering for the vaccine and scheduling follow-up appointments.	SMS Communication • SMS Short code • Mobile Activation (Private Short Code only) • Sales or Service Cloud (Enterprise or Unlimited Edition) • Digital Engagement • Omni-Channel in Lightning Experience Email Communication • Marketing Cloud (Corporate or Enterprise Edition) • Private Domain	View Now

Solution Kit	Products	Links
	• Journey Builder • MC Connect • Tracking • SSL Certificates • Dedicated IP for any customer sending over 100k messages per month	
Respect Consent Preferences in Marketing Cloud with the Consent Data Model Understand the Salesforce Consent Data Model, its components, and purpose. Then use that data model to manage and respect consent preferences in Marketing Cloud.	• Marketing Cloud • Sales Cloud • Service Cloud	View Now
Send Back-in-Stock Notifications Let shoppers register their interest in out-of-stock items. Send personalized messages when the item is available. Gain insights into the popularity of products.	• B2C Commerce Enterprise SFRA or SiteGenesis • Marketing Cloud Enterprise 2.0 • Marketing Cloud Journey Builder • Marketing Cloud Connect • Service Cloud Enterprise or Unlimited Edition including the REST APIs	View Now
Personalize Experience Cloud Websites With Marketing Cloud Personalization Personalize, make recommendations, and track user behavior in Experience Cloud using standard Marketing Cloud Personalization (formerly Interaction Studio) functionality, like banner recommendations and global templates.	• Marketing Cloud Personalization (Growth or Premium edition) • Experience Cloud (Enterprise, Performance, Unlimited, or Developer edition)	View Now

Personalize Experience Cloud Websites Using Marketing Cloud Personalization
Personalize, make recommendations, and track user behavior in Experience Cloud using standard Marketing Cloud Personalization (formerly Interaction Studio) functionality like banner recommendations and global templates.

Collect Health Verifications to Return to Work

Verify your employees' COVID-19 health status to ensure safety when returning to the workplace.

Create a Custom Preference Center

Improve your customer relationships by synchronizing the Salesforce core Individual object with the Marketing Cloud Engagement profile center and subscription center.

Manage Vaccine Communications with Marketing Cloud Engagement

Use Marketing Cloud Engagement to deliver timely communications about registering for the vaccine and scheduling follow-up appointments.

Send Back-in-Stock Notifications

Let shoppers register their interest in out-of-stock items. Send personalized messages when the item is available. Gain insights into the popularity of products.

See Also

Salesforce Solution Kits: Quick Look

Personalize Experience Cloud Websites Using Marketing Cloud Personalization

Personalize, make recommendations, and track user behavior in Experience Cloud using standard Marketing Cloud Personalization (formerly Interaction Studio) functionality like banner recommendations and global templates.

Get Started

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look

Track user behavior in Experience Cloud to enhance the user profile in Experience Cloud and other marketing channels. By personalizing content in the Experience Cloud platform, you drive a better customer experience. And with the insights you collect, you can understand your customer and inform experiences across all your marketing channels.

This solution kit helps you:

- Add an Marketing Cloud Personalization JavaScript beacon to an Experience Cloud website.
- Deploy Marketing Cloud Personalization lightning web components such as Data Capture and Personalization to the Experience Cloud organization.
- Add Data Capture and Personalization components to the Experience Cloud website.
- Configure the Marketing Cloud Personalization sitemap and web templates to work with Data Capture and Personalization components on the Experience Cloud website.
- Understand which Marketing Cloud Personalization use cases can be accomplished in Experience Cloud.

Required Products

- Marketing Cloud Personalization (Growth or Premium Editions)
- Experience Cloud (Enterprise, Performance, Unlimited, or Developer Editions)

Other Recommended Technology

- Salesforce CLI

Implementation Time

The expected implementation time is 3 hours, depending on complexity. This estimate doesn't include developing an Marketing Cloud Personalization sitemap or setting up Marketing Cloud Personalization personalization campaigns and templates.

Implement This Solution

Run-time Workflow
Learn how data flows through the configurations when you use Marketing Cloud Personalization (formerly Interaction Studio) to personalize Experience Cloud websites.

Design Considerations
Keep these design considerations in mind when you use Marketing Cloud Personalization (formerly Interaction Studio) to personalize Experience Cloud websites.

Configurations
Use these configurations to personalize Experience Cloud websites using Marketing Cloud Personalization (formerly Interaction Studio).

Run-time Workflow

Learn how data flows through the configurations when you use Marketing Cloud Personalization (formerly Interaction Studio) to personalize Experience Cloud websites.

This diagram illustrates the workflow for using Marketing Cloud Personalization to personalize Experience Cloud websites.

Experience Cloud pages are built using different components. This integration includes two additional components (LWCs): the Data Capture component and the Personalization component.

- The customer visits an Experience Cloud website. (1)
- The Data Capture component captures customer data for logged-in users and initializes Marketing Cloud Personalization for all users. (2)
- Marketing Cloud Personalization receives user data and requests personalization campaigns. (3)
- In parallel, each Personalization Lightning component informs Marketing Cloud Personalization that it's available and waits for the personalized content. (4)
- Marketing Cloud Personalization registers each of the Personalized Components and continues its execution flow. (5)
- Marketing Cloud Personalization receives campaigns and generates personalized HTML content using Web Templates. (6)
- Marketing Cloud Personalization web templates send content events to Personalization Lightning Web components. These events include information about target content zone IDs and personalized content. (7)

- Personalization Lightning Web components receive these events and populate content on the Experience Cloud Website. (8)
- The customer receives personalized content on the Experience Cloud website. (9)
- The customer interacts with the personalized content. (10)
- Personalization Lightning Web components capture campaign impressions and clicks and send them back to Marketing Cloud Personalization. (11)
- Marketing Cloud Personalization receives impression and click events and makes them available for further personalization and segmentation. (12)

Related Content

Take the next steps in this implementation.

- Design Considerations
- Configurations

See Also

Introduction to Lightning Web Components
Marketing Cloud Personalization Web Integration
Marketing Cloud Personalization Web Templates

Design Considerations

Keep these design considerations in mind when you use Marketing Cloud Personalization (formerly Interaction Studio) to personalize Experience Cloud websites.

Personalization Use Cases

To personalize a banner, use the native campaign and banner template functionality in Marketing Cloud Personalization.

For product and content recommendations, use the native campaign and recommendation template functionality in Marketing Cloud Personalization.

Use the exit intent (pop-up) global template in Marketing Cloud Personalization as part of the native campaign and template functionality in Marketing Cloud Personalization.

Use custom or updated global templates. Ensure that the output is HTML added to the lightning web components (LWC).

Capture and Track Data Use Cases

Collect pageviews and interaction with Marketing Cloud Personalization in Experience Cloud. Collect and

track the clicks or views of visitors and personalization interactions from Marketing Cloud Personalization-driven content.

Use anonymous data to personalize the Experience Cloud, or collect known data on the Personalization unified customer profile. Use this data for cross-channel personalization, segmentation, and so forth.

Collect unique IDs stored and passed via an Marketing Cloud Personalization call within an LWC, including available data like email and Salesforce ID. When no unique identifiers are present, user data is anonymously tracked until an identifier is known.

Data collected in Experience Cloud is added to the Unified Customer Profile and used across any personalization channel through standard Marketing Cloud Personalization methods.

Capture Unique Page IDs and Add Metadata Through Extract, Transform, Load (ETL)

Collect an ID from content, page, product, and article via tracking through an LWC. To capture the additional metadata, tie this ID to a catalog imported into Marketing Cloud Personalization via standard ETLs.

For example, if you want to track a knowledge article, send the knowledge article ID for the page. This view matches to the ID in the content catalog and connects metadata like category, tags, and product to build affinity.

Data Collection Limitations

Marketing Cloud Personalization Sitemaps on Experience Cloud websites don't support collecting detailed product information and other contextual metadata from the HTML elements on the page. We recommend capturing a page's unique ID from the URL and adding all corresponding metadata through ETL Integration for these types of tracking use cases.

For example, if you want to track a view of the knowledge article, the URL of the page usually contains the article ID. Marketing Cloud Personalization Sitemap can extract this ID, match it to the content catalog, and connect metadata like category, tags, and product referenced to build user affinities.

Personalization Limitations

Marketing Cloud Personalization Sitemaps on Experience Cloud websites don't support custom web templates that include interactive content relying on third-party javascript libraries. Examples include custom templates for image slideshows and content carousels. For these personalization use cases, we recommend creating additional personalization LWCs and implementing frontend UI logic there.

Areas Requiring Further Investigation

LWCs in Aura and Lightning Web Runtime with Locker enabled can verify the Marketing Cloud Personalization integration with Experience Cloud. However, this integration on Aura components isn't yet verified.

Related Content

	Review earlier steps in this solution. • Run-time Workflow
	Take the next steps in this implementation. • Configurations

See Also

Marketing Cloud Personalization ETL Integration
Marketing Cloud Personalization Catalogs and Profiles

Configurations

Use these configurations to personalize Experience Cloud websites using Marketing Cloud Personalization (formerly Interaction Studio).

Add the Marketing Cloud Personalization Beacon and Supporting Scripts to the Experience Cloud Website

1. Add your Experience Cloud domains to the allowed domains list in Marketing Cloud Personalization.
2. Locate and copy the integration code for the Marketing Cloud Personalization JavaScript beacon.
3. Make sure that your integration code looks similar to this code, where {account} is your Marketing Cloud Personalization account name and {dataset} is the name of your Marketing Cloud Personalization dataset:

```
<script type="text/javascript"
src="//cdn.evgnet.com/beacon/{account}/{dataset}/scripts/evergage.min.j
s"></script>
```

4. In Experience Builder, click **Settings**, **Advanced**, and then **Edit Head Markup** to add markup to the head of every page. Paste the Marketing Cloud Personalization JavaScript beacon code into the head markup.
5. Paste supporting inline scripts from the GitHub source code into the head markup after the Marketing Cloud Personalization JavaScript beacon code.
6. In Experience Builder, click **Settings**, then **Security & Privacy**. Under Content Security Policy (CSP), find Security Level. Click the dropdown, and then select **Relaxed CSP: Permit Access to Inline Scripts and Allowed Hosts**.
7. In Experience Builder, click **Settings**, then **Security & Privacy**. Under Content Security Policy (CSP), find Trusted Sites for Scripts. Click **Add Trusted Site**, and then add these three URLs.

a. Copy the URL in the Marketing Cloud Personalization JavaScript beacon code as in step 2. For example, https://cdn.evgnet.com/beacon/{account}/{dataset}/scripts/evergage.min.js
b. https://cdn.evgnet.com/
c. Your Marketing Cloud Personalization account Base URL. Click **Gears** in the main menu of Marketing Cloud Personalization. Copy the URL in your browser's address bar. For example, https://companyname.us-1.evergage.com/

8. Follow instructions from this article to add these three trusted URLs in Setup.
   - https://cdn.evgnet.com/
   - https://cdn.evergage.com/
   - Your Marketing Cloud Personalization account Base URL. Click **Gears** in the main menu of Marketing Cloud Personalization. Copy the URL in your browser's address bar. For example, https://companyname.us-1.evergage.com/

Use the Examples Provided To Build Your Own Personalization Components and Deploy Them To Your Org

Refer to the instructions in:View and edit the source code using Workbench or the Visual Studio Code editor.

- GitHub source code
- LWC documentation

Add and Configure Marketing Cloud Personalization Components on Your Target Pages

1. After installing the custom components, open Experience Builder on the site you want to enable Marketing Cloud Personalization.
2. In Experience Builder, click the Lightning Components icon to expand the components panel. If your installation was successful, you see two new components towards the bottom of the components panel, under the Custom Components section. The names of these two components differ depending on whether you installed them via managed package, source code from Github, or updates to your own existing custom components. Look for two components named IS Data Capture and IS Personalization Block.
3. Drag and drop each of those components onto the page you want to serve your Marketing Cloud Personalization campaign from. You can use them on multiple pages. Also, you can drop multiple instances of the IS Personalization Block component onto a single page. Only add the IS Data Capture component one time to a page. You can include it in the page header or footer section. A green box in some components indicates what the component does. These green boxes only display in Experience Builder and aren't visible to your end user.
4. To display the component's configuration panel, click the **IS Personalization Block** component. In the Content Zone text box, enter the name of the content zone used in the Marketing Cloud Personalization selector.
5. Set the Content Zone property for every personalization component. The Content Zone is an ID attribute of the virtual placeholder DIV tag and only includes latin characters in lower case, digits,

underscores, or hyphens.

6. Preview and then publish your Experience Cloud site.

Configure the Marketing Cloud Personalization Sitemap

1. Create a standard Marketing Cloud Personalization sitemap.
2. Add content zones for all personalization components used on your Experience Cloud Website in the Marketing Cloud Personalization sitemap. Enter a name for the Content Zone and this pattern for the selector: where {CONTENT_ZONE_PROPERTY} is the value of the Content Zone property of the corresponding Personalization Component: #{CONTENT_ZONE_PROPERTY}. For example, if you set the Content Zone property of a Personalization component to **product-recs**, set the Content Zone selector in the Marketing Cloud Personalization sitemap to **#product-recs**.
3. Wrap the standard initialization code of the sitemap with an event listener from the Data Collection Component, and then add supporting methods.

   Note These code snippets are examples. Customer-specific implementations require additional adjustments.

   For example, replace this code:

```
Evergage.initSitemap(config);
```

   With this code:

```
  var currentUrl = window.location.href;
  var isSitemapInitialized = false;
  document.addEventListener('lwc_onuserdataready', (e) => {
       if(isSitemapInitialized) return;

       isSitemapInitialized = true;

       interactionStudioExperienceCloudHelpers.catchBuilderContext();

       interactionStudioExperienceCloudHelpers.userData = e && e.detail &&
e.detail.userData;

       Evergage.initSitemap(config);

       setInterval(() => {
           if(currentUrl !== window.location.href){
               currentUrl = window.location.href;
               Evergage.reinit();
           }
       }, 1000);
```

```
    });
```

4. To capture known user data, add a global onActionEvent to your sitemap.

```
onActionEvent: (event) => {
    if(userData){
        event.user = event.user || {};
        event.user.attributes = event.user.attributes || {};
        event.user.attributes.userName = ((userData?.fields?.FirstName?.value
|| '') + ' ' + (userData?.fields?.LastName?.value || '')).trim();
        event.user.attributes.experienceCloudUserId = userData?.id;
        event.user.attributes.emailAddress = userData?.fields?.Email?.value;
        event.user.attributes.companyName = userData?.fields?.CompanyName?.va
lue;
    }
    return event;
}
```

5. Review this example sitemap in GitHub.

Modify Marketing Cloud Personalization Web Templates

1. Modify only those web templates that require real content zone elements or that replace original content of the website, for example Banner with Call-To-Action or Einstein Product Recommendations. Web templates that automatically append content to the body of the page like Exit Intent Pop-Up with Email Capture don't require any modifications.
2. Open a web template, and proceed with the Client Side tab.
3. Locate this line of code:

```
Evergage.cashDom(element).html(html);
```

4. Replace it with this code:

```
document.dispatchEvent(
    new CustomEvent('interactionstudio_oncontentforcomponentready',
    {
        detail: {
            selector: contentZoneSelector,
            html: html
        },
    }
));
```

5. Save and publish this web template.

Related Content

Review earlier steps in this solution.

- Run-time Workflow
- Design Considerations

See Also

Marketing Cloud Personalization Sitemap Development
Marketing Cloud Personalization Web Templates

Collect Health Verifications to Return to Work

Verify your employees' COVID-19 health status to ensure safety when returning to the workplace.

Get Started

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look

This solution kit helps you:

- Capture employee health verifications with a digital process using Lightning Flow.
- Extend the Work.com Employee data model to define a custom object that holds COVID-19 health status information.
- Organize health verification requests for HR representatives to review, accept, or reject employee health verification records in a standard console.

Required Products

- Work.com, Sales Cloud, Service Cloud, or Salesforce Industries Cloud
- Experience Cloud (Optional)

Disclaimer

Work.com and Vaccine Cloud provide you with essential solutions designed to help businesses reopen the workplace as quickly as possible while taking into account health and safety needs. Review

Salesforce's Principles of Ethical Use of COVID-19 Vaccine Technology Solutions document to consider how your organization can use this solution kit in an effective and equitable manner.

This solution kit is a reference implementation that provides an overview for implementing potential solutions for verification of COVID health status documentation or credentials. When implemented, this solution kit also allows you to collect and use personal information about individuals, including health-related information, which is subject to various legal requirements in different jurisdictions. Consult with your organization's legal counsel to confirm that your intended use of this solution kit is appropriate for use cases. In addition, ensure that you're in compliance with local privacy and healthcare laws, as well as any other applicable laws or guidance.

Implement This Solution

Workflow
Learn how data flows through the configurations when you collect health verifications to return to work.

Design Consideration
Keep these design considerations in mind when you collect health verifications to return to work.

Configurations
Use these configuration steps to collect health verifications to return to work.

See Also
Trailhead: Flow Builer Trail - Add Screens to Your Flow
Trailhead: Screen Flow Distribution

Workflow

Learn how data flows through the configurations when you collect health verifications to return to work.

- The company sends out communication via an email or third-party channel for a health verification attestation. (1)
- The employee can accept or decline the attestation process. (2)
- The employee enters their health verification information. (3)
- The employee uploads documented proof of their health verification. (4)
- The company's HR department receives the health verification record for them to review. (5)
- HR verifies whether the employee is cleared to return to the workplace or not. (6)

See Also
Trailhead: Flow Builer Trail - Add Screens to Your Flow
Trailhead: Screen Flow Distribution

Design Consideration

Keep these design considerations in mind when you collect health verifications to return to work.

Employee Object

This solution kit uses the Employee object in the Work.com solution to achieve the desired result. This solution kit can be modified to work with other objects in Salesforce, including, but not limited to:

- Users
- Person Accounts
- Contacts
- Custom Objects

Note This solution kit isn't tested against External Objects.

Health Verification Object Permissions

The Health Verification object in this solution kit is a Custom Object. Implement this solution kit with the standard Employee, User, Person Account, or Contact Objects and use the Health Verification object as a related list. Do so by setting your permissions structure so that only authorized personnel can view this sensitive employee data. Salesforce recommends that you consult with your human resources and legal counsel to determine who can access and verify this information.

Options for Displaying the Health Verification Flow to Employees

The Health Verification Lightning Flow can be presented to employees in multiple ways. Popular display methods include:

- Community Page within the Work.com Employee Workspace
- Community Page within an Employee Community
- Lightning App Page within a Work.com org
- Custom login flow assigned to specific profiles

Flow Security in Communities

Override the run flow permission to assign access to specific flows based on permission set or profile as a best practice. Avoid allowing access to all flows based solely on the run flow permission. When using flows, remember to keep flow limits and Apex governor limits in mind.

Enable Field History Tracking

Field history tracking is used to monitor changes in specific field values. Companies can use Field History

Tracking to understand health verification record field changes for auditing purposes.

Agent Experience

To improve the agent review experience, companies can set up Quick Actions on the Health Verification objects to quickly update the Health Verification Status Field.

See Also

- Salesforce Help: How Does Flow Security Work?
- Salesforce Help: Track Field History for Custom Objects
- Salesforce Help: Create Object-Specific Quick Actions
- Salesforce Help: Employee Workspace
- Salesforce Help: Understand the Work.com Data Model
- Salesforce Help: Lightning Page Types
- Salesforce Help: Custom Login Flows
- Salesforce Help: General Flow Limits

Configurations

Use these configuration steps to collect health verifications to return to work.

Overview and Prerequisites

Use these steps to help set up your health verification process:

- Set up a new custom Object with the recommended name, Health Verification.
- Enable the Consent Management Objects, including the Individual Object. Go to Setup > Company Information > Data Protection and Privacy.
  - Check the 'Make data protection details available in records' checkbox.
  - Save the changes.
- Create an Authorization Form record and an Authorization Form Text record to capture individuals' requested consent authorization details for COVID-19 related topics.
- Create a dedicated screen flow for the health verification process.
- Create an Experience Cloud Digital Experience page to host the screen flow created for the health verification process.

Note To make it easier to keep permissions data, consider using a separate Salesforce instance when using this solution kit.

New Custom Object Setup

- New Custom Object
  - Suggested Label: Health Verification
  - Suggested Object Name: Health Verification

- Data Type: Auto Number
- If you plan to collect documentation, check the 'Add Notes and Attachments related list to default page layout' checkbox.

- Within the Health Verification object, create these fields.
  - Field Name: Health Verification Method
    - Description: This field describes the method of COVID-19 health status verification being attested to.
    - Field Type: Picklist
      - Proof of Vaccination
      - Negative COVID-19 Test
      - Documentation of COVID-19 Recovery
  - Field Name: Employee (Required) - See the Design Considerations section.
    - Description: This field connects the Health Verification record to the related Employee record.
    - Field Type: Lookup Relationship
  - Field Name: Health Verification Status
    - Description: This field captures the status of the employee's health verification status based on the submitted information.
    - Field Type: Picklist
      - Not Verified
      - Pending Approval
      - Verified
      - Declined
  - Field Name: Declined?
    - Description: This field captures when the employee declines to go through the health verification process.
    - Checkbox field - Default = False
  - Field Name: Declination Reason
    - Description: This field captures the reason the employee declined an available health verification.
    - Field Type: Picklist

      Note When using this picklist, consult with your organization's HR team and legal counsel. They can help you select the appropriate fields to populate for the Declination Reasons, as determined for your particular use cases. HR and legal counsel can also help to ensure compliance with local privacy and healthcare laws, as well as any other applicable laws or guidance
  - Field Name: Health Credential Document Date
    - Description: This field captures the date that the health credential was issued. Verifiers must confirm if this date also reflects the date that the related health event occurred.
      - Field Type: Date
  - Field Name: Verification Date
    - Description: This field captures the date that an organization member verified the end user's health credential.
      - Field Type: Date and Time
  - Field Name: Health Credential Expiration Date (Optional)
    - Description: This field tracks health verification expirations. For example, how often does an

employee require a test? Or, when does a vaccination require a booster based on local health authority guidance?
  - Field Type: Date

Create Consent Management Records

This solutions kit uses Salesforce Consent Management Objects to capture end-user consent for verification. When users accept terms and conditions, a new Authorization Form Consent record is automatically created. First, manually create an Authorization Form record and an Authorization Form Text record to associate with future Authorization Form Consent records. These records are required before you can configure the Health Verification Lightning Flow. The Authorization Form Text record ID is then passed into the flow as a Field Value. There, it automatically creates the Authorization Form Consent record with the correctly attached Authorization Form Text record.

- Create an Authorization Form record to represent capturing the user's authorization. Don't populate the Authorization Form Text lookup field at this time. Save this record before you create an Authorization Form Text record.
  - Required fields: Name
- Create New Authorization Form Text record
  - Required fields: Name, Authorization Form (Lookup)
  - Recommended fields: Full Authorization Form URL, Summary Auth Form Text, Content Document
- Update the Authorization Form record with the newly created Authorization Form Text record
  - Recommended fields: Default Auth Form Text (Lookup)

The Authorization Form Text record ID is inserted into the Lightning Flow Accept Journey's Create Authorized Form Consent record step.

Note When creating the Authorization Form and Authorization Form Text records, consult with your organization's HR specialist and legal counsel. They can help you include appropriate consent language for your own use cases and ensure compliance with local privacy and healthcare laws.

Set Up Your Health Verification Screen Flow

This Health Verification Lightning Flow consists of three main screen flow steps:

1. Capture consent acknowledgment.
2. Capture health verification information.
3. Capture health verification file upload.

To create a flow, from Setup, in the Quick Find box, enter **Flows**, and then select **Flows**. Create a Screen flow from the selection menu. Throughout this section, only some Flow steps contain suggestions for labels. However, admins must name their API convention carefully.

- **Flow Step:** Get Records
  - Flow Step Description: Get the employee's information from the User ID. To access the

Employee.UserId lookup field, you must have object-level access to the field.
- Object: Employee, or Person Account, Contact, or other record where employee information is stored
  - Condition requirements - All Conditions Are Met (AND)
    - Field: UserId
    - Operator: Equals
    - Value: {!$User.Id}
  - Sort Order - Not sorted
  - How Many Records to Store
    - Only the first record
  - How to Store Record Data
    - Automatically store all fields

- **Flow Step:** Screen Flow (screen properties and steps are described from top to bottom)
  - Flow Step Description: Create a screen to capture consent acknowledgment
  - Screen Properties
    - Configure Frame
      - Show Footer = True
    - Control Navigation
      - Next or Finish = True
  - Display Text Component
    - Text: Health Verification Form
  - Display Text Component
    - Text: Consent Acknowledgment
  - Display Text Component
    - This flow must include obtaining consent from end users for:
      - Collection and processing of their personal data, including personal health information, for verification of their COVID health status.
      - An acknowledgment of relevant information provided to them about the COVID-19 vaccines and their potential risks and benefits.

    Note Consult your organization's legal counsel to include appropriate consent language for your use cases and to ensure compliance with local privacy and healthcare laws, as well as any other applicable laws or guidance.

  - Display Text Component
    - Leave section intentionally blank for spacing
  - Radio Buttons Component
    - Create Choice Resources to use in the Radio Button Component that represents the Accept and Decline paths of the Consent Acknowledgment screen. These Choice Resources are used in the component's Configure Choices section.
    - Sample Label - I have:
      - Read and understand the Terms and Conditions as well as the Privacy Notice.
      - Acknowledge and consent to the processing of my personal data for the purpose of verifying my COVID-19 health status pursuant thereto.
    - Required = True
    - Data Type = True

    - Default Value = No Default Value
    - Configure Choices
      - Let Users Select Multiple Options: No
      - Component Type: Radio Buttons
      - Choice: [Accept Choice Resource]
      - Choice: [Decline Choice Resource]
- **Flow Step:** Decision
  - Flow Step Description: Create decision based on user's consent response on previous screen.
  - Outcome Order
    - Accept
      - Label: Accept
      - Condition Requirements to Execute Outcome
        - All Conditions Are Met (AND)
          - Resource: [Reference the API name of Radio Buttons Component from the Consent Acknowledgment screen]
          - Operator: Equals
          - Value: [Accept Choice Resource]
    - Decline
      - Label: Decline
      - Condition Requirements to Execute Outcome
        - All Conditions Are Met (AND)
          - Resource: [Reference the API name of Radio Buttons Component from the Consent Acknowledgment screen]
          - Operator: Equals
          - Value: [Decline Choice Resources]

Accept Journey

- **Flow Step:** Screen Flow (from top to bottom of component)
  - Flow Step Description: Create screen to capture health verification information.
  - Screen Properties
    - Configure Frame
      - Show Footer = True
    - Control Navigation
      - Next or Finish = True
      - Previous = True
  - Display Text Component
    - Text: Health Verification Form
  - Display Text Component
    - Text: Complete the health verification-related questions below.
  - Radio Button Component
    - Create Picklist Choice Resources to use in the Radio Button Component that represents the Health Verification Method picklist field.
    - Label: Health Verification Method
    - Required: True

        - Data Type: Text
        - Let Users Select Multiple Options: No
        - Component Type: Radio Buttons
        - Choice: [Reference Picklist Choice Set Created for Health Verification Method picklist]
    - Display Text Component
        - Text: Enter the Date of Health Verification. If your health verification process requires more than one step, for example, multiple vaccination dates, submit only the information related to the final step of the process.
    - Date Component
        - Configuration
            - Label: Date of Health Verification
            - Require = True
            - Default Value = Blank
            - Set Component Visibility
                - When to Display Component = Always
- **Flow Step:** Create Records
    - Flow Step Description: Create Health Verification record
    - How Many Records to Create
        - Select 'One'
    - How to Set the Record Fields
        - Select 'Use separate resources, and literal values'
    - Create a Record of this object
        - Object: Health Verification
    - Set Field Values for the Health Verification
        - Field: Employee__c
            - Value: [Reference 'Get Employee from User ID' step's API Name]
        - Field: Health_Verification_Date__c
            - Value: [Reference 'Date of Health Verification' screen component's API Name]
        - Field: Health_Verification_Status__c
            - Value: Select picklist value 'Not Verified'
        - Field: Health_Verification_Method__c
            - Value: [Reference the Health Verification Method Picklist Choice Set value]
- **Flow Step:** Screen Flow (from top to bottom of component)
    - Flow Step Description: Create screen to capture health verification file upload.
    - Screen Properties
        - Configure Name
            - Show Footer = True
        - Control Navigation
            - Next or Finish = True
            - Previous = True
    - Display Text Component
        - Text: Health Verification Form
    - Display Text Component
        - Upload a file to provide proof of your health verification. File extensions accepted: .jpeg, .jpg, .png, .pdf.

- File Upload Component
  - File Upload Label: Upload your vaccination card below:
  - Accepted Formats: .jpeg, .jpg, .png, .pdf
  - Related Record ID: [Reference API name from 'Create Step - Create Health Verification record']
- Set Component Visibility
  - When to Display Component
    - Always

- **Flow Step:** Create Records
  - Flow Step Description: Create Authorized Form Consent record
  - How Many Record to Create
    - Select 'One'
  - How to Set the Record Fields
    - Select 'Use separate resources, and literal values'
  - Create a Record of this Object
    - Object: Authorization Form Consent
  - Set Field Values for the Authorized Form Consent

    Note Prior to using and implementing this flow, consult with your organization's legal counsel. Confirm whether your organization is permitted by law to collect proof of COVID vaccination or other health status.

    - Field: [AuthorizationFormTextID record ID created in the 'Create Consent Management Records' section]
    - Field: ConsentCapturedDataTime
      - Value: {!$Flow.CurrentDate}
    - Field: ConsentCaptureSource
      - Value: Health Verification Flow
    - Field: ConsentCaptureSourceType
      - Value: Web
    - Field: ConsentGiverID
      - Value: [Reference the Employee's related Individual ID through the 'Get Record - Get the Employee's information from the User ID' step]
    - Field: Name
      - Value: [Reference the Employee Name variable through the 'Get Record - Get the employee's information from the User ID' step]
    - Field: Status
      - Value: Select picklist value 'Seen'
- **Flow Step:** Screen Flow
  - Flow Step Description: Create screen to display confirmation
  - Screen Properties
    - Configure Frame
      - Show Footer = True
    - Control Navigation
      - Next or Finish = True
      - Previous = True
  - Display Text Component

    - Text: Health Verification Form
  - Display Text Component
    - Text: Thank you for submitting your heath verification attestation.

Decline Journey

- **Flow Step:** Screen Flow
  - Flow Step Description: Create screen to capture declination reason.
  - Screen Properties
    - Configure Frame
      - Show Footer = True
    - Control Navigation
      - Next or Finish = True
      - Previous = True
  - Display Text Component
    - Text: Health Verification Form
  - Display Text Component
    - Text: Indicate your reason for declining:
  - Picklist Component
    - Create Picklist Choice Resources to use in the Picklist screen flow component that represents the 'Declination Reason' picklist field.
    - Label: Declination Reason
    - Data Type: Text
    - Default Value: No Default Value
    - Select Choices
      - Choice: [Reference Picklist Choice Set Created for Declination Reason picklist]
    - Set Component Visibility
      - When to Display Component: Always
- **Flow Step:** Create Records
  - Flow Step Description: Create Health Verification record for declined health verification
  - How Many Records to Create
    - Select 'One'
  - How to Set the Record Fields
    - Select 'Use separate resources, and literal values'
  - Create a Record of This Object
    - Object: Health Verification
  - Set Field Values for the Health Verification
    - Field: Declination_Reason__c
      - Value: [Reference the Declination Reason Picklist Choice Set value]
    - Field: Declined__c
      - Value: {!$GlobalConstant.True}
    - Field: Employee__c**** (see Considerations)
      - Value: [Reference 'Get Employee from User ID' step's API Name]
    - Field: Health_Verification_Date__c
      - Value: {!$Flow.CurrentDate}

        - Field: Health_Verification_Status__c
            - Value: Select ‘Declined’ picklist value
- **Flow Step:** Display Text Component
    - Flow Step Description: Create screen to display confirmation.
    - Screen Properties
        - Configure Frame
            - Show Footer = True
        - Control Navigation
            - Next or Finish = True
    - Display Text Component
        - Text: Health Verification Form
    - Display Text Component
        - Text: Thank you for submitting your health verification declination.

Congratulations! You’ve configured the employee health verification Lightning Flow to help your organization return to work. It’s now time to test your flow. See Design Considerations - Options for Displaying the Health Verification Flow to Employee’s for options on displaying and testing your Lightning Flow.

See Also

- Salesforce Help: How Does Flow Security Work?
- Salesforce Help: Track Field History for Custom Objects
- Salesforce Help: Create Object-Specific Quick Actions
- Salesforce Help: Employee Workspace
- Salesforce Help: Understand the Work.com Data Model
- Salesforce Help: Lightning Page Types
- Salesforce Help: Custom Login Flows
- Salesforce Help: General Flow Limits

Create a Custom Preference Center

Improve your customer relationships by synchronizing the Salesforce core Individual object with the Marketing Cloud Engagement profile center and subscription center.

Get Started

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look

The Individual object saves a user's data privacy preferences and employs them when communicating with Leads, Contacts, and Person Accounts. With Preference Center in Marketing Cloud Engagement, you can synchronize custom attributes with custom fields on Core objects. This solution kit addresses the fact that there's no direct way to map custom fields to the Individual object.

This solution kit helps you:

- Improve customer relationships.
- Synchronize Sales Cloud and Service Cloud Individual object implementation with the profile center and subscription center.
- Adhere to GDPR law.
- Keep your marketing campaign GDPR compliant.
- Maintain lead management in line with GDPR regulations.

Required Products

- Marketing Cloud Engagement (all editions)
- Salesforce Lightning Platform (Sales, Service, or B2B)

Implement This Solution

Workflow

Learn how data flows through the configurations when you create a custom preference center.

Design Considerations

Keep these design considerations in mind when you create a custom preference center.

Configurations

Use these configurations to create a custom preference center.

Workflow

Learn how data flows through the configurations when you create a custom preference center.

This diagram illustrates the workflow for creating a custom preference center.

- Store data privacy options for leads, contacts, person accounts, and users in the Core Individual object. (1)
- Create custom fields in the Sales or Service Cloud objects. For synchronization purposes, create a record trigger flow (after update) to update Individual objects, or vice versa. (2)
- Map the custom fields to Marketing Cloud Engagement attributes for use in the Profile Center. (3)
- Use the Profile Center webpage with Marketing Cloud Connect. Your subscribers can enter and maintain their personal information that you store. (4)
- Use the Subscription Center web page. Your subscribers can manage the messages that they receive from you. (5)

- Include a link to the Profile Center in every Engagement email to a Salesforce contact, lead, report, or campaign so that customers can manage their attributes and subscription preferences. These changes update Salesforce contact and lead data. (6)

Related Content

Take the next steps in this implementation.

- Design Considerations
- Configurations

Design Considerations

Keep these design considerations in mind when you create a custom preference center.

What Is a Preference Center?

A preference center is a centralized contact management tool:

- Customers can manage the messages that they receive from a brand and the channels where they receive them.
- Customers can manage their accounts with brands.
- Marketers can tailor their contact strategy, including frequency and content, based on customer feedback.

Why Customize a Preference Center?

- The relationship that a company has with its customers evolves.
- Customer contact preferences shift as business and personal routines do, and as customer communication habits change.
- By setting expectations and offering improved controls, businesses can solidify a relationship of trust and increase customer retention.
- A well-designed preference center reduces guesswork and improves efficiency and responses. It centralizes governance and can serve as a source of truth when a growing team of marketers is sending customer communications.

When Is a Preference Center Most Important?

- At signup
- At opt-out, with the opportunity to opt down
- For account changes
- For life changes and milestones that require updates such as a new job or name change

- When adding types of messages
- When adding new channels
- For selecting frequency
- When adding a brand, org, team, country, or region
- To delegate sending capabilities
- To expand to multiple-language communications

Common Data Considerations

1. When hosting the preference center, evaluate your current setup and consider these hosting options.
   - SFMC: Migrates to a centralized location with a feedback loop to CRM and other databases
   - EHI: Site information goes to SFMC via API or MC Connect
   - Lacek: Externally hosts
   - Other options: For example, Salesforce Experience Cloud
2. Determine how to fit the new preference data into the current data model with as little disruption as possible.
   - What system is the source of truth for preferences?
   - What integrations are necessary to support the data model?
   - Determine the hierarchy of data filters and apply it consistently. For example, Global do-not-contact > Channel-specific opt-out > preference filters > additional and behavioral segmentation.
   - How do options differ for members and non-members?
3. Which entry points do customers use to access the preference center? Is the experience the same from all entry points, or do certain paths have broader or narrower access?
   - Web profile login
   - Channel: email (footer, body), phone (sales rep), mobile (web, app)
4. How does authentication work?
   - Is login required? Can the user authenticate with an email address, or do they need a profile?
   - What are the data privacy concerns? What national or regional regulations do you adhere to?
   - Can a customer service or sales rep update user preferences easily?
5. How do you handle historical data? Review all sources of existing data, and develop a plan to assign status and level of access.
6. Do you allow subscribers to set how often they want to hear from you? Can you offer that frequency capping?
7. Do you want new or different data than you now collect? To build trust, collect only the data that you intend to use in the next 6 months.

Contact Governance

Contact Governance Is a set of guiding principles for enterprise-wide data management and contact strategy. Control for frequency, message prioritization, and permission to honor subscriber preferences and provide the best customer experience.

The Customer Experience

Use a customer-first approach to ensure that you honor permission and understand customers' implicit and explicit interests. Focus on the customer experience. Avoid over-communicating irrelevant content, which can lead to customer fatigue and attrition.

Data Standardization

Use a common data schema across brands and channels, allowing for a master record that ties to all customer data. Data standardization creates parity across brands, clusters, and the enterprise to avoid losing sight of the customer and valuable data attributes.

A governance center of excellence (COE) is a streamlined governance model for managing subscriptions, unsubscribe events, and new use cases for subscribers, account holders (nonloyalty), and loyalty members. Improve the customer experience and make data management simpler.

Creating these preferences involves the marketing and technology teams for segmentation, language, and channel. Prepare for this work, even if adoption is light at first. When your goals and priorities are aligned across brands, you're ready to move into gathering technical requirements and scoping your project.

Related Content

Review earlier steps in this solution.

- Workflow

Take the next steps in this implementation.

- Configurations

See Also

- Create a Custom Profile Center with AMPscript
- Consent Management for Marketing Cloud Engagement
- Do Not Track Email Opens and Clicks
- Configure a Preference Attribute for Do Not Track Email Opens and Clicks
- Object Reference for Salesforce and Lightning Platform
- Record Trigger Flow

Configurations

Use these configurations to create a custom preference center.

Define Your Source of Truth

- Third party central: Any third-party system external to Salesforce is the touchpoint for customers with a defined strategy for replication or synchronization.
- Lightning Platform: Use the Individual object.
- Marketing Cloud Engagement: Use Preference Center.

Set Up the Individual Object

The Salesforce Individual object includes some standards that create individual records for existing Leads and Contacts. Checkbox fields track user preferences such as Don't Process and Forget this individual.

Implement the Salesforce Individual Object

Set up data privacy records then encrypt the Individual Name field with the type of tenant secret and encryption scheme of your choice. These actions let your users track and store certain Data Privacy preferences.

- Enable Data Privacy and Protection.
- Create a new Individual record from a Lead or Contact or create an Individual record without linking it to Lead or Contact records.
- After the New button appears, you can create a record and associate it to a specific Lead or Contact if necessary.

Manually Update or Automate Individual Records

Salesforce Core uses the Individual object on Reports, Workflows, Process Builder, Flow, and Apex to maintain your business process. As a customer's preferences change, you can update the Individual records and honor the new preferences manually, or via APEX or AppExchange. In Engagement, use AMPscript to apply your customer options on email templates.

Filter Audiences

Profile center and subscription center work with List, but Journeys and Automations require these extra actions.

- Create a support data extension that holds your customer summarized preferences.
- To filter and mix your customer preferences with your journey intake, use Automation Studio's SSJS Activity and Query Activity.
- Create an Attribute Group on Contact Builder that stores customer preferences about journey subjects.

As a workaround, you can use Automation Studio. Update the custom profile center attributes for Salesforce contacts added by journeys for the first time, on a regular basis, or triggered by the journey.

Use the function RetrieveSalesforceObject() if the journey contains an email with AMPscript.

Receive and Store Consent

- Collect compliance requests outside of Engagement functionality. Determine the best process for your business to receive and store this information as part of your data protection and privacy regulation review.
- Make sure that your consent language corresponds to your privacy notices and policies.
- Consent must be specific, informed, and unambiguous. Collect positive consent, and avoid automatically selected checkboxes.
- The process for obtaining consent regarding messaging to children is stricter.
- Contacts must be able to withdraw consent at any time.
- Contacts must freely give consent, and you can't base usage of your website on provision of consent.
- Consent to use data must be specific for each purpose that you use data for.

Determine Permission Across Message Types

- Explicit Permission: The person actively and knowingly shares their contact information with the expectation of receiving commercial emails. This type of permission is the safest method.
- Implicit Permission: Assumes permission based on a variety of factors. If expectations aren't set, then deliverability issues and high attrition can result. This type of permission often results in poor compliance with regulations such as CAN-SPAM, CASL, and GDPR. Review your permission types with your legal counsel.

Set Rules to Prioritize Messages and Types by Brand and Channel

- Brand Model: The brand with the most recent activity takes priority. The first brand to gain permission takes priority.
- Email Engagement Model: Ranks by average message KPIs (open and click rates). Set rules to prioritize messages and types by brand and by channel.
- Customer Model: Prioritizes the value of the customer, including purchase amounts, frequency, and time on file. Uses personas based on account type, vehicle class, website, and email engagement.
- Revenue and Return Model: Uses the message with the highest estimated revenue or return per message for each subscriber.

Synchronize Profile Center

- Configure Marketing Cloud Connect to synchronize the Individual object in a Data Extension.
- Create Automation Filters.
- Configure SQL and SSJS.

SQL and SSJS Examples:

```
SELECT
     sub.SubscriberKey "Subscriber Key",
     sub.EmailAddress "Email Address",
     sent.OYBAccountID "BusinessUnitID"

FROM
     _Subscribers sub
     inner join _Sent sent on sub.SubscriberKey = sent.SubscriberKey
     inner join _EnterpriseAttribute ea on sub.SubscriberID = ea._SubscriberID

WHERE
     sent.OYBAccountID <> ea.BusinessUnitID
```

```
<script runat="server">
     Platform.Load("Core", "1");
     try {
          var mid = YOUR BUSINESS UNIT ID;
          var skey = "YOUR SUBSCRIBER KEY";
          var sub = {
               "Attributes": { "BusinessUnitID": mid }
          };
          var subObj = Subscriber.Init(skey);
          var status = subObj.Update(sub);
          Write(Stringify(status));
     } catch(e) { Write(Stringify(e)); }
</script>
```

Related Content

Review earlier steps in this solution.

- Workflow
- Design Considerations

See Also

- Create a record for standard Individual object
- The Profile Center and Subscription Center in Distributed Sending
- Trailhead - Identify Preferences

Manage Vaccine Communications with Marketing Cloud Engagement

Use Marketing Cloud Engagement to deliver timely communications about registering for the vaccine and scheduling follow-up appointments.

Get Started

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look

The rollout of a COVID-19 vaccine program is a complex technical and logistical endeavor. Individuals who want to get vaccinated need consistent and relevant information. The Engagement app lets you communicate with the most relevant audience at scale and reduces confusion about appointments and general vaccine knowledge.

As you develop your communication strategy, consider how it can enable prompt and equitable messaging to all stakeholders. Review Salesforce's lessons from the field, and consider:

- Localizing your solution so that it's available in languages other than English.
- Incorporating accessibility practices like screen reader support so that everyone can access your communication.
- Testing your implementation for backwards compatibility. Many recipients use older web browsers or non-smartphone technology.

This solution kit helps you:

- Send invitations for appointment scheduling.
- Provide confirmation email or SMS for vaccine appointments.
- Deliver appointment reminders for first and second vaccinations. Send bulk message notifications for situations such as cancellations, location changes, or rescheduling.
- Deliver post-vaccination communications for non-health related information.
- Reduce the implementation time for new Engagement accounts.

Required Products and Technology

SMS Communication

- SMS Short code
- Mobile Activation (Private Short Code only)
- Sales or Service Cloud (Enterprise or Unlimited Edition)
- Digital Engagement
- Omni-Channel in Lightning Experience

Email Communication

- Marketing Cloud Engagement (Corporate or Enterprise Edition)
- Private Domain
- Journey Builder
- MC Connect
- Tracking
- SSL Certificates
- Dedicated IP for any customer sending over 100,000 messages per month

Implementation Overview

Implementation time: The suggested overall time is 2–3 weeks between channel lead times and configuration of Engagement. SMS communications require additional time. After the expedited provisioning process, complete the standard configuration in the next 30–45 days.

An Engagement implementation across channels has standard lead times.

- Spend 8–10 days selecting an email subdomain specific to the brand.
- Spend 2–3 weeks provisioning SMS short code.
- Spend 1 day setting up SSL Certificates to use the existing default Engagement app setup.

Note This implementation requires the use of Salesforce Professional Services or a partner. Partners must be certified for SMS.

Implement This Solution

Workflow

Learn how data flows through the configurations when you manage vaccine communications with Marketing Cloud Engagement.

Design Considerations

Keep these design considerations in mind when you manage vaccine communications with Marketing Cloud Engagement.

Configurations

Use these configurations to manage vaccine communications with Marketing Cloud Engagement.

Workflow

Learn how data flows through the configurations when you manage vaccine communications with Marketing Cloud Engagement.

SMS Workflow

Provide your customers with outbound messages and assistance with their vaccine appointment questions and issues. A customer receives a personal interaction from an agent by sending keywords such as HELP, and then the agent updates the customer's account as needed for future engagement.

This diagram illustrates the SMS workflow for managing vaccine communications with Engagement.

- The marketer sends a campaign SMS Message. (1)
- A customer responds with the HELP keyword. (2)
- The Text response message triggers. (3)
- A customer receives a message to expect a text from an agent within 24 hours from a different number. (4)
- The AMPscript creates a case in Service Cloud. (5)
- Service Cloud receives the case and links to an existing customer contact or creates a contact. (6)
- Service Cloud grants implicit opt-in. (7)
- Service Cloud assigns the case to an agent queue. (8)
- Service Cloud routes the case through Omni-Channel to available agents.(9)
- An agent sends an outbound SMS from a long or short code configured in Digital Engagement. (10)
- The agent assists the customer in two-way conversation. (11)
- The agent closes the case. (12)

Email Workflow

Send bulk email campaigns to distribute information, appointment reminders, second appointment prompts, and invitations.

- To bring raw Health Cloud data into Engagement, synchronize data extensions.
- Create a bulk audience in Engagement from the synchronized data extension.
- Use Automation Studio or bulk injection into journeys.

Use near real-time messaging to provide alerts when vaccine appointments are available. After the shot has been administered, send information on possible side effects. Use Journey Builder Sales Cloud entry sources to listen for object record changes.

Send real-time messaging to provide instant messages on appointment confirmations, appointment

reminders, and appointment cancellations. Use the Transactional API.

Use APEX Code in the Health Cloud Process Builder to directly call the Transactional API for the Engagement app.

- Make an API call to Engagement using the ContactID for the patient receiving the communication.
- If needed, use web hooks to retrieve tracking data.

Related Content

Take the next steps in this implementation.

- Design Considerations
- Configurations

See Also

Run Conversational Campaigns for SMS Solution Kit

Design Considerations

Keep these design considerations in mind when you manage vaccine communications with Marketing Cloud Engagement.

Account Configuration

- With SAP, the customer can save time by fully delegating their subdomain to the Engagement app. Hosting DNS takes longer.
- For SSL certificates, Engagement generates and controls both SSL certificates to prevent the lengthier forced redirection.

Messaging Use Cases

Identify the trigger moment for each message type and where it's initiated. Base this moment on a CRM object change such as appointment record creation or on CRM logic in a process builder or flow. Two examples are 2 hours before an appointment and message initiation.

Core CRM Considerations

- The CRM object referenced in the Salesforce data Journey Builder entry source must relate back to ContactID, specifically Account.PersonContactID. Route people through journeys, not transactions.
- While most Marketing Cloud Connect traffic is excluded from CRM daily API limits, all current core APEX limits still apply.

- Watch for CPU CRM governor limits when using larger flows, more than 50 journeys, or setting up more than 50 journeys for the entry event referencing the same object.
- Together, Salesforce activities written back to CRM and Salesforce entry events injected into the journey contribute to governor limits.

Related Content

	Review earlier steps in this solution. • Workflow
	Take the next steps in this implementation. • Configurations

See Also

Marketing Cloud Connect
Install the Marketing Cloud Connect Managed Package
Marketing Cloud Connect Frequently Asked Questions
Manage Customer Journeys
Multi-Step Journeys
Transactional Send Journeys
Entry Sources
The Salesforce Data Event
Synchronized Data Sources in Contact Builder
Create Synchronized Data Sources in Contact Builder
Synchronized Object Relationship Priority
Synchronized Data Extensions: Limit of 250 Fields

Configurations

Use these configurations to manage vaccine communications with Marketing Cloud Engagement.

Account Setup

- Spend 4–6 weeks creating the business unit and email authentication such as SAP, SPF, DKIM, and SSL for the best deliverability. Set up the sender authentication package (SAP) to include sender policy framework (SPF), DKIM, private domains, image URLs, SSL security, and so on. This time period includes limited sending (<=100 K) for IP address warming unless you're using an existing SAP subdomain and warmed IP address.
- Spend 1 day setting up the administration user for cross-cloud integration in Marketing Cloud Connect. Set up design users for email creative tools.

Integration

Spend 1–2 days setting up Marketing Cloud Connect to integrate your Engagement app with the Sales and Service Cloud organization. This setup allows Journey Builder to listen to changes in CRM objects and send messages. Synchronize the sales and service Health Cloud raw object data to bulk campaigns in Engagement.

Data Model

Spend 1–2 days configuring data extensions and tables for Journey Builder entry sources.

Journeys

- Spend 1–2 days creating Journey Builder entry sources in Engagement. Listen to Sales Cloud and Service Cloud object changes and trigger the injection into a journey.
- Spend 2–3 days configuring journeys. Configure journeys to use the entry source and create associated email activity and creative aspects.

Quality Assurance

Spend 2–3 days testing. Activate the journey. Validate changes to Sales Cloud and Service Cloud objects that place contacts and patients on the appropriate journey in Engagement.

Go-Live and Validation

To track engagement, validate that you're properly capturing tracking details like opens and clicks. Optionally, you can continually update key milestone data back to Sales Cloud and Service Cloud objects.

Related Content

Review earlier steps in this solution.

- Workflow
- Design Considerations

See Also

- Manage Customer Journeys
- Multi-Step Journeys
- Transactional Send Journeys
- Entry Sources
- The Salesforce Data Event

Marketing Cloud Connect
Marketing Cloud Connect Frequently Asked Questions
Synchronized Data Sources in Contact Builder
Create Synchronized Data Sources in Contact Builder
Synchronized Object Relationship Priority
Synchronized Data Extensions: Limit of 250 Fields
Intro to Marketing Cloud Engagement APIs

Send Back-in-Stock Notifications

Let shoppers register their interest in out-of-stock items. Send personalized messages when the item is available. Gain insights into the popularity of products.

Get Started

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look

This solution kit helps you:

- Let shoppers request back-in-stock notifications from the product details page.
- Send notifications when a requested item is back in stock or inform shoppers that an item hasn't come back into stock within a defined period.
- Track notification requests and email engagement metrics, like open rate, CTR, and conversion rate.
- Minimize creation of duplicate contacts in Service Cloud and Marketing Cloud Engagement.
- Learn about customer interest in your products.
- Ensure sales and delight customers.

Implementation Overview

Send back-in-stock notifications by using Marketing Cloud Connect and B2C CRM Sync to connect B2C Commerce (Commerce Cloud), Service Cloud, and Marketing Cloud Engagement. This Solution Kit includes Service Cloud for full visibility of the customer's interest in out-of-stock products and to prevent duplicate contacts in Engagement. If you don't have these requirements, you can send notification requests directly from Commerce Cloud to Engagement.

Required Products

- B2C Commerce Enterprise SFRA or SiteGenesis as part of the SalesforceCommerceCloud GitHub organization (see Access the GitHub Repositories)
- Marketing Cloud Engagement Enterprise 2.0
- Journey Builder
- Marketing Cloud Connect
- Service Cloud Enterprise or Unlimited Edition, including the REST APIs

Other Recommended Technology

- Engagement reference implementation for B2C Commerce as part of the SalesforceCommerceCloud GitHub organization (see Access the GitHub Repositories).
- Salesforce B2C CRM Sync, an enablement solution that focuses on multicloud use cases. This approach uses REST APIs and the declarative capabilities of the Salesforce platform. This solution works across B2C Commerce, Service Cloud, and Engagement by resolving and synchronizing customer profiles across these Salesforce products. Learn more about the application overview and feature summary.

Recommended Roles and Skills

- Marketing Cloud Engagement Certified Developer
- Service Cloud Certified Administrator
- B2C Commerce Certified Architect
- B2C Commerce Certified Developer (front end and back end)
- Business owners and UX from Commerce, Service, and Marketing teams to define requirements

Implementation Considerations

Shoppers can change their mind about purchasing your product if stock doesn't come in or the back-in-stock notification takes too long to arrive. To mitigate this situation, create a strategy to offer alternative products on your out-of-stock product detail page using B2C Commerce Einstein product recommendations. Make sure your catalog feed includes out-of-stock products to generate recommendations on an out of stock Product Detail page.

Maintain good quality data about future inventory so that you aren't offering a notification for something that is discontinued. You not only defer the sale, you also set an expectation with your potential customer that you can't deliver on. You can also include notifications only for continuity and not seasonal lines.

Ensure that you have the decision criteria available to B2C Commerce only for the products that you expect to be replenished. It doesn't have to be perfect. Plans change, but if you know that forecasting online inventory is a challenge for your business, don't use back-in-stock notifications.

You can start with a proof of concept before investing in the full Customer 360 approach discussed in

this Solution Kit. Many B2C Commerce customers have built an end-to-end back-in-stock notification solution in B2C Commerce using custom objects and B2C Commerce emails. This approach doesn't give you the level of tracking, creativity, and Customer 360 visibility of a multicloud solution. However, it gives you an idea of how effective back-in-stock notifications are.

Implement This Solution

Back-in-Stock Notification Workflow
Learn how data flows through the configurations when you send back-in-stock notifications.

Back-in-Stock Design Considerations
Keep these design considerations in mind when you send back-in-stock notifications.

Integration Reference Implementations for Back-in-Stock Notifications
Integration reference implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.

Configuring Back-in-Stock Notifications
Use these configurations to send back-in-stock notifications.

See Also
Trailhead: Salesforce Solution Kits: Quick Look

Back-in-Stock Notification Workflow

Learn how data flows through the configurations when you send back-in-stock notifications.

This diagram illustrates the workflow for sending back-in stock-notifications.

- On the product detail page of an out-of-stock product, the customer provides their email address to request a back-in-stock notification. (1)
- B2C Commerce captures the form submission. (2)
- B2C Commerce makes a REST API call to Service Cloud containing the notification request. (3)
- Service Cloud uses matching rules to find an existing contact or create a contact. (4)
- Service Cloud creates a record in a back-in-stock custom object. The record includes the contact and the product SKU from the notification request with a Requested status. (5)
- Marketing Cloud Connect synchronizes the back-in-stock object with Marketing Cloud Engagement. (6)
- Engagement populates the synchronized data extensions. (7)
- As part of the regular store operations processes, B2C Commerce receives updated inventory. (8)
- A job runs in B2C Commerce to create a catalog feed for Engagement with current inventory availability status and upload the feed to Marketing Cloud Engagement SFTP. (9)
- Engagement imports the catalog feed. (10)
- Engagement checks the catalog feed for available inventory on products with back-in-stock notification requests. Matches are added to a journey. (11)

- Engagement sends a notification message to the customer. (12)
- The customer receives the notification message. (13)
- Engagement sends a Salesforce Update Object activity to Service Cloud using MC Connect. (14)
- The status of the Back in Stock record in Service Cloud updates to sent. You can send further updates for open and click. (15)

Data Flow

Data flows from the Commerce site to Engagement in two streams. The information from the two streams identifies the target audience and sends emails to customers when items are back in stock.

- Service Cloud receives the notification request created by the customer and sends it to Engagement via MC Connect.
- The stock inventory feed communicates with the Engagement SFTP and uploads to a data extension.

Related Content

Take the next steps in this implementation.

- Back-in-Stock Design Considerations
- Integration Reference Implementations for Back-in-Stock Notifications

Back-in-Stock Design Considerations

Keep these design considerations in mind when you send back-in-stock notifications.

Primary Keys

Marketing Cloud Engagement

- Use the Service Cloud ContactID value for the subscriber key in Engagement.
- Avoid using email address, SMS number, or mobile device ID for the subscriber key.

Commerce Cloud

- CustomerID is the system-generated ID for a registered customer.
- Customer.Profile.customerNo is the number used to identify registered customers.
- Decorate the Commerce Cloud customer record with the CRM contact ID using b2c-crm-sync, a reference implementation for integration of Salesforce CRM and B2C Commerce.
- For unregistered visitors, use the contact resolution features of b2c-crm-sync.
- To learn more about integrating B2C Commerce with Service Cloud, review the enablement

framework b2c-crm-sync.

Sales and Service Cloud

- Use or modify the B2C-CRM-Sync enablement solution helper flows to resolve to a matching contact record when it shares an email address. Configure duplicate rules to block, allow with alert, or report possible duplicates.
- If the email can't be matched to an existing customer, the receiving REST flow endpoint can create a contact record. To create a contact, Service Cloud requires the last name field. Capture the customer's first and last names in the notification request form in Commerce Cloud.
- The B2C-CRM-Sync enablement solution can send the email and ProductID. If the customer has logged in, pass the customerNo to help matching rules.
- Using a CRM ContactID simplifies overall integration with Experience Cloud and Commerce Cloud.

User Experience

- Capturing back-in-stock notification requests on the product detail page requires custom development on the B2C Commerce storefront. Ensure that your existing templates allow the selection of variations that are out of stock.
- If the customer is already logged in to the storefront, consider pre-populating the email address from the customer profile in the back-in-stock notification request.
- To create a contact, Service Cloud requires the last name field to be populated. Capture the customer's last name in the notification request form in Commerce Cloud. If you have UX reasons for not capturing the name, such as asking for only an email address, explore using default values for last names.
- In your back-in-stock notification email template include the product image, name, and variation details, like size and color. Link to PDP. Consider advising that the item availability is correct at the time the email is sent. Remind the customer that they requested this notification and that it's the only email they receive about it
- Do you maintain products on the storefront that you already know aren't coming back into stock after they sell out? In this case, you could use a custom product attribute to specify which products are eligible for back-in-stock notifications and putting a process in place for populating and maintaining this attribute.
- You can create an alternative journey that notifies customers if a back-in-stock notification hasn't been fulfilled after a certain time period and include product recommendations to highlight alternatives.
- Determine how to handle API failures, such as reporting back to the customer if the notification request was unsuccessful.

Reporting

- Engagement provides functionality to track opens and clicks.
- Google Analytics provides click tracking to revenue reporting capabilities. See Google Analytics 360 Integration for Engagement.
- Ensure that the notification sign-up data is being captured in Service Cloud, for example, the master ID as well as the SKU.

Configuring Data Feeds for Commerce and Engagement

- Use and extend the Engagement reference integration to create an Engagement catalog feed from B2C Commerce.
- Streaming updates provides an alternative to catalog feeds, but isn't efficient for large numbers of product SKUs.

Localization

- When managing multi-country websites, include localized product information in the back-in-stock notification emails.
- If you intend to have separate business units in Engagement for each language, create a localized catalog feed for each one.
- If you have a single business unit covering multiple languages, include local product information and review the file size.

Performance

Catalog Import

- If your catalog includes more than one million SKUs, import the catalog using delta files.
- Import only the data that you plan to use in Engagement.
- If the volume or frequency of your catalog update concerns you, contact your Engagement account executive or success manager.

Marketing Cloud Engagement

- Review Journey Builder performance documentation to ensure optimal setup.
- Take note of the Contact Builder best practices.
- Ensure that an appropriate individual record data retention is in place on the Journey Data Extensions.

Service Cloud

- Each call from Commerce to Service to create a back-in-stock notification request is an individual API request and counts against daily API limits in Service Cloud. See API Limits.
- Be aware of the volume of API requests and storage requirements for the stock notification request records. See Data and File Storage Allocations.
- If the data is no longer required, archive or configure a flow to automatically remove it.

Feed and Notifications Scheduling

The availability status of each SKU is a snapshot from the time the catalog feed is created in B2C Commerce. To minimize time delay, review the scheduling of your catalog feed import and back-in-stock notification.

Fast Moving Inventory

If your products tend to sell through quickly, you risk having customers click a back-in-stock notification and find the product already out of stock. You can extend the catalog feed model to include the inventory count and send notifications only when the inventory is above a specified threshold. If this threshold changes per product, consider you can add a custom product attribute where the product-specific threshold can be maintained and include this attribute in the catalog feed. Ensure there's a process in place for populating and maintaining this attribute.

Service Cloud Considerations

Use a back-in-stock notification custom object with a relationship to the contact to store the stock notification requests and status. Configure the Lightning UI to show these requests and status where required by service agents.

Considerations for the Engagement App

- Use a multi-org or single org connecter for MC Connect.
- Use additional Sales and Service Cloud journey activities in your journeys to update your contacts or other objects in Service Cloud.

Engagement Reference Implementation for B2C Commerce

The Engagement reference implementation for B2C Commerce includes steps for creating a catalog feed that you can use in this solution. No other functionality from the reference implementation is used in this solution but consider installing the collect tracking code in Commerce Cloud to support other use cases. Use cases include abandoned cart and behavior personalization using Einstein recommendations.

Related Content

Review earlier steps in this solution.

- Back-in-Stock Notification Workflow

Take the next steps in this implementation.

- Integration Reference Implementations for Back-in-Stock Notifications
- Configuring Back-in-Stock Notifications

Integration Reference Implementations for Back-in-Stock Notifications

Integration reference implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.

B2C CRM Sync

Salesforce B2C CRM Sync is an enablement solution that focuses on multicloud use cases. This approach uses REST APIs and the declarative capabilities of the Salesforce platform. This solution works across B2C Commerce, Service Cloud, and Marketing Cloud Engagement by resolving and synchronizing customer profiles across these Salesforce products. Learn more about the application overview and feature summary.

Engagement Reference Implementation for B2C Commerce

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

Before implementing, consider conducting an environmental audit with an Engagement account executive to confirm that you meet the prerequisites for the use case.

Before implementing the configurations, sign in to GitHub, and set up the Engagement reference implementation using the GitHub repository wiki instructions. If you're a Commerce Cloud customer or partner without access to the GitHub repository, get Unified Authentication to enable access.

General Information About Reference Implementations

- 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 Engagement and B2C Commerce Cloud. The Commerce Cloud storefront requires customization as part of the integration.
- Implementation and validation require operational and administrative experience with Engagement.
- Plan your implementation as you would any other B2C Commerce Cloud feature by collecting requirements, capturing work tasks, and making task estimates.

What You Can Do with This Reference Implementation

- Accelerate integration time to market for Commerce Cloud and Engagement.
- Simplify and centralize email authoring and content management.
- Improve marketing agility, efficiency, and campaign performance.
- Personalize engagement based on past purchases and shopper interactions.
- Capture revenue from cart, search, or browse abandonments by implementing storefront behavior monitoring and behavioral email delivery.
- Connect Commerce Cloud and Marketing Cloud Engagement using existing REST APIs exposed by

Commerce and Engagement.
- Enable one-way sharing of customer, catalog, and order data from B2C Commerce Cloud to Engagement using the Connector's data feed framework.
- Trigger transactional email sends from Commerce Cloud that Engagement delivers.

Related Content

	Review earlier steps in this solution. • Back-in-Stock Notification Workflow • Back-in-Stock Design Considerations
	Take the next step in this implementation. • Configuring Back-in-Stock Notifications

Configuring Back-in-Stock Notifications

Use these configurations to send back-in-stock notifications.

Catalog Feed

Catalog Feed from Commerce Cloud to Marketing Cloud Engagement

Use the Marketing Cloud Connector for Commerce Cloud to send a regular catalog feed.

The default catalog feed configuration sends the onlineAvailability flag. However, this flag indicates that the product is set to be available online and not that it is in stock or out of stock. Override the catalog feed script to use the `getAvailabilityModel().isInStock()` method and output it in the feed.

Catalog Importing in Engagement

Import the catalog into a data extension using Automation Studio. Create a data extension using the product catalog field list described in Einstein Recommendations Catalog Field Definitions.

If you're using or planning to implement Einstein Recommendations, you can instead use the catalog import in Engagement, setting the schedule options as appropriate. Set the import notification settings to monitor the success or failure of the import.

Back-in-Stock Notifications

Create a Notification Sign-Up on the Product Detail Page

- Override the productAvailability.isml in a new cartridge.
- Render an alternative template if the stock is unavailable.
- Use a form to capture the notification request.
- Use a controller to handle the UI request and pass it to model.
- Use a model to invoke the b2c-crm-sync ServiceMgr to send the request to Service Cloud.

Create a Service Cloud Flow to Receive the Notification Requests

- The flow resolves the customer to a contact record or creates a contact.
- The flow creates an associated Back In Stock Notification custom object record with:
  - Master and detail relationship to the contact record
  - Product ID and SKU
  - Status of requested or sent

Use MC Connect to connect Service Cloud and Engagement. Consider using a multi-org setup.

After setup, use Contact Builder to configure synchronized data sources. Select only the objects and fields that you require. We recommend the contact object and the Back In Stock Notification custom object.

Depending on the configuration of your Service Cloud, sync other prerequisite objects.

Deliver Back-in-Stock Notification Emails with Engagement

Use Content Builder to create the emails. Ensure that your email is created with a link to the product display page to let customers directly access the product from their inbox.

Create a data extension to use as the entry source for the journey in Journey Builder.

Use Automation Studio to create an automation. Use the SQL query to create the audience based on the stock now being available. Ensure that the SQL query collects the required fields across the sync data extensions and product catalog IGO_Products (or user-created product) data extension. Ensure that the SQL query adds the contacts to the journey data extension.

Suggested fields are:Ensure that the SQL query collects only records where the status of the back-in-stock notification is requested. Append only new records into the journey data extension.

- ContactID
- EmailAddress
- SkuID
- ProductName
- ProductLink
- ImageLink
- BIS_ID (the ID of the back-in-stock notification record from the synchronized data extension)

Create your journey using the data extension as your entry source, evaluating new record entries. Create at least two journey activity steps. The first step sends the email, and the second step updates the back-in-stock notification record status to sent. This journey prevents more than one notification from being

sent for each logged request.

Configure your automation and journey to run daily after the product catalog import completes.

Use Service Cloud to create required reports on back-in-stock notification sign-ups, for example, to share with stock management.

Get insights about shopper purchases using Google Analytics 360.

Related Content

Review earlier steps in this solution.

- Back-in-Stock Notification Workflow
- Back-in-Stock Design Considerations
- Integration Reference Implementations for Back-in-Stock Notifications