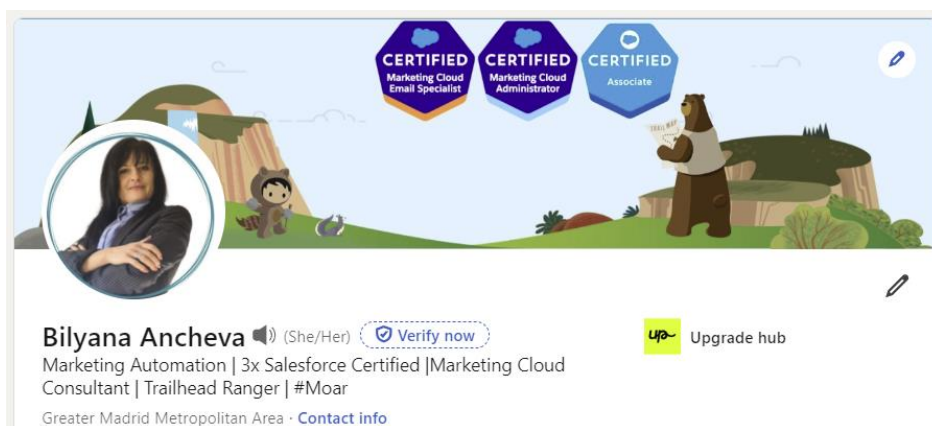


Marketing Automation Insurance Sector

June 2024

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Use Case 1

Audience Segmentation

We are going to activate an email and SMS campaign to launch a new car insurance. The database contains client information, including age, location, other active insurance, and previous insurance information.

The goal is to segment the audience to send an email and SMS to customers who meet certain criteria.

Create a SQL query to create segmentation, all the information is in a CUSTOMER HISTORY:

1. Clients aged between 25 and 40 years.
 2. Clients who live in Madrid and Barcelona.
 3. Customers who have purchased car insurance in the past.
 4. Exclude customers who currently have car insurance.
 5. The SQL query should retrieve the relevant DE information and generate a new DE from emails and SMS of the customers who meet the set criteria.
 6. In addition, there is another DE with customer Claims, and we must exclude customers having an open claim from the shipment.
- having

Solution: My GitHub repo

<https://github.com/ba23-python/SQL-Assignment>

DATA MODEL CONSTRUCTION OUT OF EXTERNAL CSV FILE

I start by reviewing and analyzing the database that the client has provided me in an Excel file.

This step is important to ensure that the data that will be imported into Marketing Cloud in data extension is mapped correctly and does not give data type errors.

I ensure the following:

- that the column fields do not contain spaces, accents and ñ-es to guarantee successful import.
- Before importing I must convert the file from Excel format to .csv format
- I rename the field year_birth and year_birth and make sure that in Spanish there are no accents on the words*not valid for English fields.
- I must correct the data type of all the columns in the file. I especially check the number and dates.

I correct the defects in the birth_year column. I see that there are incomplete dates, I have no further requirements if you only need the year without the date, therefore I leave it in day-month-year format.

A	B	C	D	E	F	G	H	I	J	K
Campo DE Cliente										
CodCliente	Nombre	Apellido	DNI	Sexo	CorreoElectronico	Móvil	Año_nacimiento	Ciudad	Seguro_Activo	Seguro_Anul
ABC123	ANA	CORTES	51751184B	F	AAAA@AAAA.COM		01/10/1978	MADRID	SALUD	HOGAR
ABC124	JUAN	PEREZ	61751184B	M	AAAA@AAAA.COM	658409498	01/01/1983	BARCELONA	HOGAR	SALUD
ABC125	LUZ	GONZALES	71751184B	F	AAAA@AAAA.COM	658409498	01/01/1998	MALAGA	AUTOS	HOGAR
ABC126	PEDRO	PEREZ	81751184B	M	AAAA@AAAA.COM	658409498	1//1/85	MURCIA	MOTOS	ACCIDENTES
ABC127	JOSE	MONTERO	91751184B	M	AAAA@AAAA.COM	658409498	1//1/86	SEVILLA	ACCIDENTES	ACCIDENTES
ABC128	MARIA	UZQUIEL	41751184B	F	AAAA@AAAA.COM	658409498	1//1/87	MADRID	HOGAR	ACCIDENTES
ABC129	JUAN	MORALES	31751184B	M	AAAA@AAAA.COM	658409498	1//1/88	BARCELONA	MASCOTAS	ACCIDENTES
ABC130	ALESIA	MONTALVO	21751184B	F	AAAA@AAAA.COM	658409498	01/02/1983	VALENCIA	SALUD	ACCIDENTES

I apply Format Cells to the birth_year column, but some rows cannot be formatted as dates, I must apply more advanced Excel formatting for these date fields. It looks like **Excel does not recognize them as dates due to the two slashes "/"**

1//1/85
1//1/86
1//1/87
1//1/88

Therefore, I apply **Excel's Datevalue function** Substitute and the result is a correctly formatted date

Data-Text-to-Columns tab I assign the date format in the last step

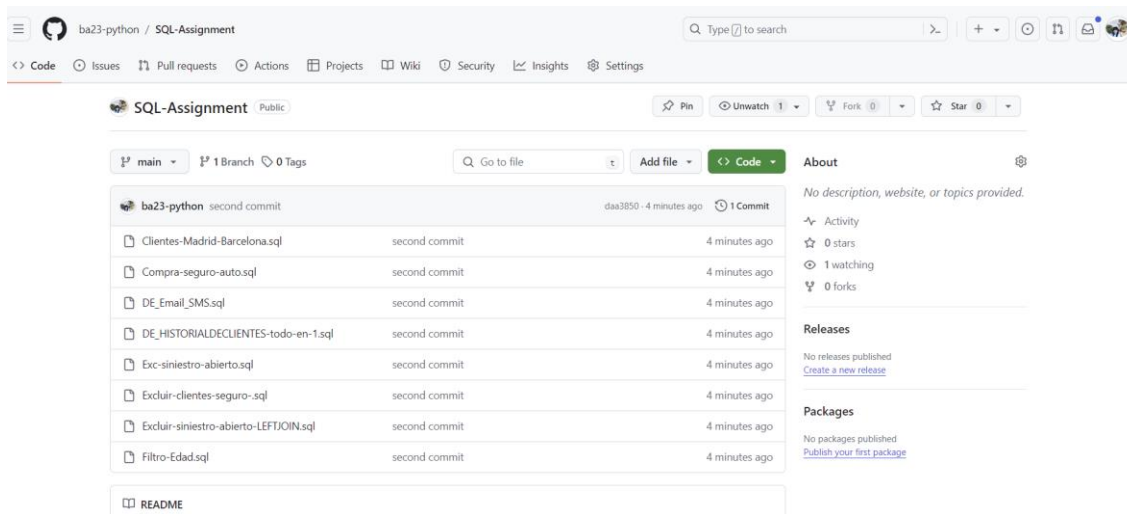
Ano_nacimiento
01-10-78
01-01-83
01-01-98
01-01-85
01-01-86
01-01-87
01-01-88
01-02-83

correctly assigns the date format according to the country at the time of importing the csv. For Spain you can leave the United Kingdom date format

when importing the csv through **Marketing Cloud Email Studio Import Wizard**, I mark the Comma Delimiter



Snapshot of my GitHub repo



I have created separate SQL slicers for each condition described in each point of the task. And on the other hand, I have created the joint query of all the tasks in one that is in the new tab of the spreadsheet called DE_CUSTOMER HISTORY-all-in-1.sql

- **Filtro-edad.sql** - 1. Customers between 25 and 40 years old.

[SQL-Assignment](#) / [Filtro-Edad.sql](#) 



ba23-python second commit

Code

Blame

36 lines (29 loc) · 885 Bytes

```
1      Clientes con edades entre 25 y 40 años.
2
3      SELECT
4      CodCliente,
5      Nombre,
6      Apellido,
7      DNI,
8      Sexo,
9      CorreoElectronico,
10     Móvil,
11     Año_nacimiento,
12     Ciudad,
13     Seguro_Activo,
14     Seguro_Anulado,
15     Si_Publicidad
16 FROM DE_Clientes
17 WHERE (YEAR(GETDATE()) - YEAR(Año_nacimiento)) BETWEEN 25 AND 40;
```

- **Cientes-Madrid-Barcelona.sql** Customers only from Madrid and Barcelona.

[SQL-Assignment](#) / [Cientes-Madrid-Barcelona.sql](#) 



ba23-python second commit


Code

Blame

13 lines (9 loc) · 289 Bytes

```
1      Clientes que viven en Madrid y Barcelona
2
3      SELECT CodCliente, Nombre, Apellido, CorreoElectronico, Móvil
4 FROM DE_Clientes
5 WHERE Ciudad IN ('MADRID', 'BARCELONA');
6
7
8      la segmentacion mostrara los siguientes suscriptores:
9
10     ABC123 (Madrid)
11     ABC124 (Barcelona)
12     ABC128 (Madrid)
13     ABC129 (Barcelona)
```

· **Compra-seguro-auto.sql** - 3. Customers with previous purchases of car insurance

[SQL-Assignment](#) / [Compra-seguro-auto.sql](#) 


 **ba23-python** second commit

Code Blame 9 lines (6 loc) · 215 Bytes

```
1  Clientes que han comprado Seguro Auto previamente
2
3  SELECT CodCliente, Nombre, Apellido, CorreoElectronico, Móvil
4  FROM DE_Clientes
5  WHERE Seguro_Anulado = 'AUTOS';
6
7  Debe de filtrar como resultado el cliente:
8
9  ABC125
```

· **Excluir-clientes-seguro.sql** Exclude customers with active car insurance

[SQL-Assignment](#) / [Excluir-clientes-seguro-.sql](#) 

 **ba23-python** second commit

Code Blame 5 lines (4 loc) · 169 Bytes

```
1  excluir clientes que tienen actualmente seguro de coche
2
3  SELECT CodCliente, Nombre, Apellido, CorreoElectronico, Móvil
4  FROM DE_Clientes
5  WHERE Seguro_Activo != 'AUTOS';
```

DE_Email_SMS.sql –

This SQL Query aims to recover retrieve relevant DE information and generate a new DE from emails and SMS of customers that meet the set criteria.

 ba23-python second commit

Code Blame 37 lines (33 loc) · 1.48 KB

```

1  SELECT CorreoElectronico, Móvil
2  FROM DE_Clientes
3  WHERE
4    (DATEPART(year, GETDATE()) - DATEPART(year, Año_nacimiento)) BETWEEN 25 AND 40
5    AND Ciudad IN ('MADRID', 'BARCELONA')
6    AND CodCliente IN (
7      SELECT CodCliente
8      FROM DE_Clientes
9      WHERE Seguro_Anulado = 'AUTOS'
10   )
11   AND Seguro_Activo != 'AUTOS'
12   AND CorreoElectronico IS NOT NULL
13   AND CorreoElectronico <> ''
14   AND Móvil IS NOT NULL
15   AND Móvil <> '';
16
17 Explicación:
18 Función DATEPART: aplico la función DATEPART, que extrae partes de una fecha.
19 Aquí, se utiliza para obtener el año de la fecha actual y el año de nacimiento para calcular la edad.
20 Filtro de Ciudad: Asegura que los clientes sean de Madrid o Barcelona.
21 Seguro de automóvil anterior: la subconsulta verifica si el cliente tuvo un seguro de automóvil en el pasado.
22 Excluir seguro de automóvil actual: Garantiza que el cliente no tenga actualmente un seguro de automóvil.
23 Correo electrónico y móvil no vacíos: garantiza que los campos de correo electrónico y móvil no sean nulos ni estén vacíos.
24
25
26 El resultado de esta segmentacion seria
27 CodCliente ABC129 (JUAN MORALES) como el unico suscriptor cumple la condicion de disponer de email y movil en el mismo tiempo
28 Edad: 36 (born in 1988)
29 Ciudad: Barcelona
30 Past car insurance (Seguro_Anulado = 'AUTOS')
31 No current car insurance (Seguro_Activo != 'AUTOS')
32 Non-empty email and mobile
33
34 Los demas suscriptores
35 ABC123 (sin movil)
36 ABC124 (sin email)
37 ABC128 (sin email)

```

- **DE_HISTORIAL DE CLIENTES-todo-en-1.sql** -This SQL QUERY CONTAINS all the tasks in one that is located in the new tab of the spreadsheet called DE_CUSTOMER HISTORY-all-

[SQL-Assignment / DE_HISTORIALDECLIENTES-todo-en-1.sql](#) 

```

ba23-python second commit

Code Blame 16 lines (13 loc) · 573 Bytes

1  -- Combinar todos los criterios en un query y guardar los datos en nueva data extension DE_HISTORIALDECLIENTES---
2
3
4  SELECT c.CodCliente, c.Nombre, c.Apellido, c.CorreoElectronico, c.Móvil
5  FROM DE_Clientes
6  WHERE (YEAR(GETDATE()) - YEAR(Año_nacimiento)) BETWEEN 25 AND 40
7        AND Ciudad IN ('MADRID', 'BARCELONA')
8        AND CodCliente IN (
9            SELECT CodCliente
10           FROM DE_Clientes
11          WHERE Seguro_Anulado = 'AUTOS'
12        )
13  AND Seguro_Activo != 'AUTOS'
14  AND (CorreoElectronico IS NOT NULL AND CorreoElectronico <> '')
15  AND (Móvil IS NOT NULL AND Móvil <> '');

```

in-1.sql

Use Case 2 Automation & Journey


We are going to activate a campaign in SFMKT, you need to design a series of steps in an Automation and Journey for this campaign.

I divide the solution into part Automation and part Journey Builder

Journey Builder-MAPPING

The campaign is aimed at promoting new insurance and consists of three waves:

- ❖ a first wave of insurance presentation
- ❖ a second reminder wave, excluding those who have already taken out the insurance,
- ❖ The third wave will be a reminder to those who have not clicked on the second email.
- ❖ in this wave those who hired should also be excluded.



The email will have a CTA “We will call you” and we will have to give the customer contacts who have clicked on the call center button so that they can call them and we must leave the file in an SFTP.

The SMS will be sent only to those who have not clicked on the second wave email. The SMS

It is informative.

The priority channel is email and SMS will be sent to customers who do not have email.

The reminder email will be sent 5 days after the first email and the SMS 3 days after sending the email

You must leave a Control Group 20% and generate a file for the SFTP.

It is important to identify the clients and the impacts they receive or to which group belong since the report must include:

Engagement:

- First wave
- Second wave
- Reminder

The databases: the clients are in a SFMKT but the contracts

They are daily loads in the SFTP.

BRAINSTORMING THE SOLUTION

Several options can be proposed, such as creating 3 separate journeys for each wave.

I would like to comment on how it could be considered in the case of the 3 journeys - 1 journey for each wave.

In this option what will be achieved is to define the clients of the 3 waves well, which is required.

- First wave - As an entry in the journey it would be Data Extension of the clients that would possibly come from the Automation studio refreshed and updated by Filter Activity with data updated at night in an automated way

- Second wave - The entry in the journey would be Data Extension segmented by SQL Activity in Automation Studio so that clients who have contracted are excluded and only those who have not yet contracted are impacted.

- Third Wave - the same as the second. As an entry in the journey it would be Data Extension segmented by SQL Activity in Automation Studio so that clients who have contracted are excluded and only those who have not yet contracted are impacted.

If there were 3 separate Journeys for each wave, it will have to be segmented in Automation Studio and generate a segment that only has those who have not purchased as input DE in Journey 2 and Journey 3 Automatic, transferring from Automation Studio to Journey Builder. Important here would be to leave 30 min of time between finishing the Automation and starting it in Journey Builder to avoid possible collisions

Even so, I have decided to propose a Multi step Journey of the 3 emails and SMS in a single journey.

Solution Use Case 2:

Multi-step Journey with 3 emails y SMS

Entry source: Data Extension DE_Customers sendable DE.

It is not explained where this data extension comes from, only that it is already in SFMC. What I assume is that it comes from Automation Studio either through Import Activity automation from FTP or through some Filter Activity automation that is done daily at night.

This data extension must be mapped by the subscriberkey in Contact Builder and Data Designer so that its dynamic attributes can be used in Contact data of the Journey Builder Decision Splits.

I am going to create empty sendable data extensions, with the following names:

DE_Purchases_1st wave

DE_Purchases_2nd wave

DE_3rd wave

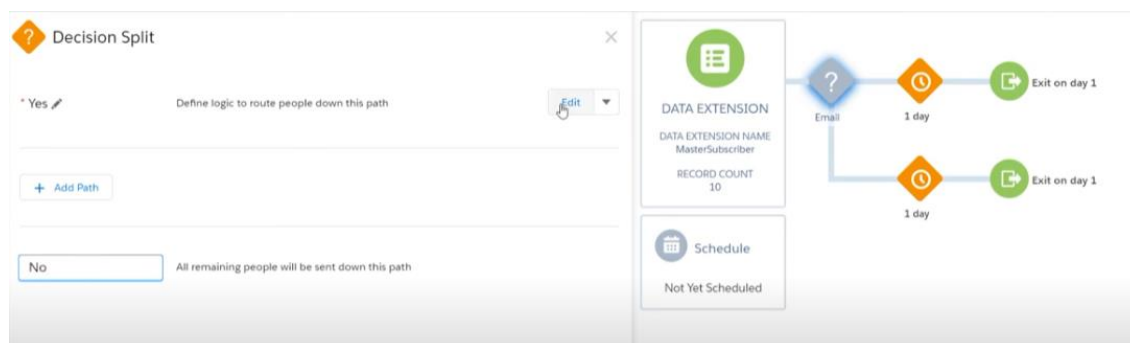
that contain StatusBuy attribute for each wave. These will be updated by the Update Contact in Journey Builder throughout the flow of the journey.

Update the previously created sendable Data Extension DE_Purchase_1st wave by attribute "Status_Purchase-IF" made. The data extensions of the waves will be segmented with SQL Query by the StatusPurchase so that it is YES, and the resulting DE will be exported with Data Extract to FTP.

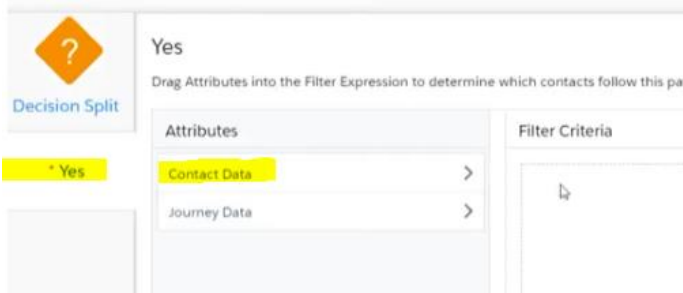
Also another data extension that would have previously been created DE_CallCenter that will save the clients of the 3rd wave who have clicked on the CTA “We call you” will be exported with Data Extract to FTP.

Then you have to do a scheduled Automation for a daily export to the FTP with these 3 - **DE_Purchases_1st wave, DE_Purchases_2nd wave, DE_3rd wave, DE_CallCenter**

Decision Split: Make sure subscriber has email or not – those with no email, will be sent an sms
Apply filter Email is not null



Since I previously linked the Contact data in Contact Builder, the dynamic attributes of the Contact Data are available to me in the Decision Split of Journey Builder.



I choose Contact data for the corresponding DE -

I drag **Email-filter is not null to guarantee that subscribers** with existing email will enter the journey (if we are sure that the DE is of good quality and all full of emails and mobile phones, there is no need to make sure and we can skip this Split)

Filter Criteria

PATH: CONTACT DATA > DEMOGRAPHICS > DEMOGRAPHICS > MASTERSUBSCRIBER

Email Address is not null

☐ Add an attribute to compare. ⓘ

Cancel Done

Engagement Split: Will register the Clicks in Email 2 and in Email 3 and depending on yes or no will split the audience in two directions.

3 Wait Activities:

1. Before each Decision Split and Engagement Split, I set a WAIT ACTIVITY so that time is spent analyzing the data collected.
2. Wait 5 days for sending the 2nd email.
3. Wait 3 days for sending SMS
4. Wait 1 day before each Exit

Update Contact

The Update Contact allows us to update or modify a Marketing Cloud contact record in Journey Builder using the update contact activity.

What Update Contact does is modify a contact attribute value when a contact reaches this point in the Journey. Choose a sendable data extension that has a previously created Send Relationship and set a static value that overrides this value for all contacts that reach the activity.

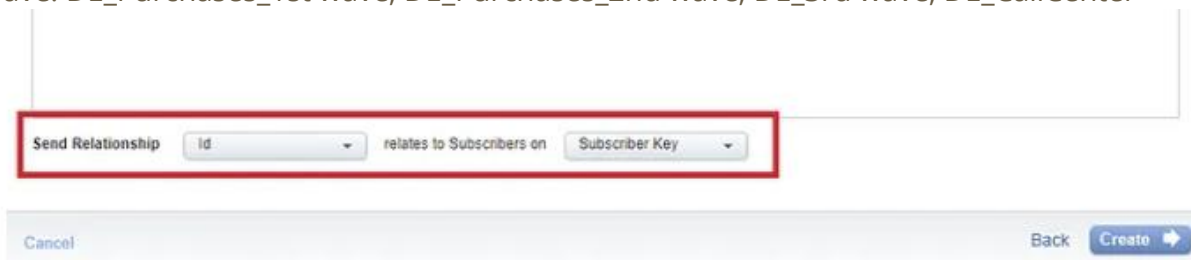
This type of Update contact is called updating “Static Value” and it is not necessary for the CRM to be linked to the Marketing Cloud.

There is the other Update Contact option that is usually applied more when the CRM is connected, but in our case the connection is not necessary. Documentation:

https://help.salesforce.com/s/articleView?id=sf.mc_jb_update_a_contact.htm&type=5

In our USE CASE, what Update Contact Will do is

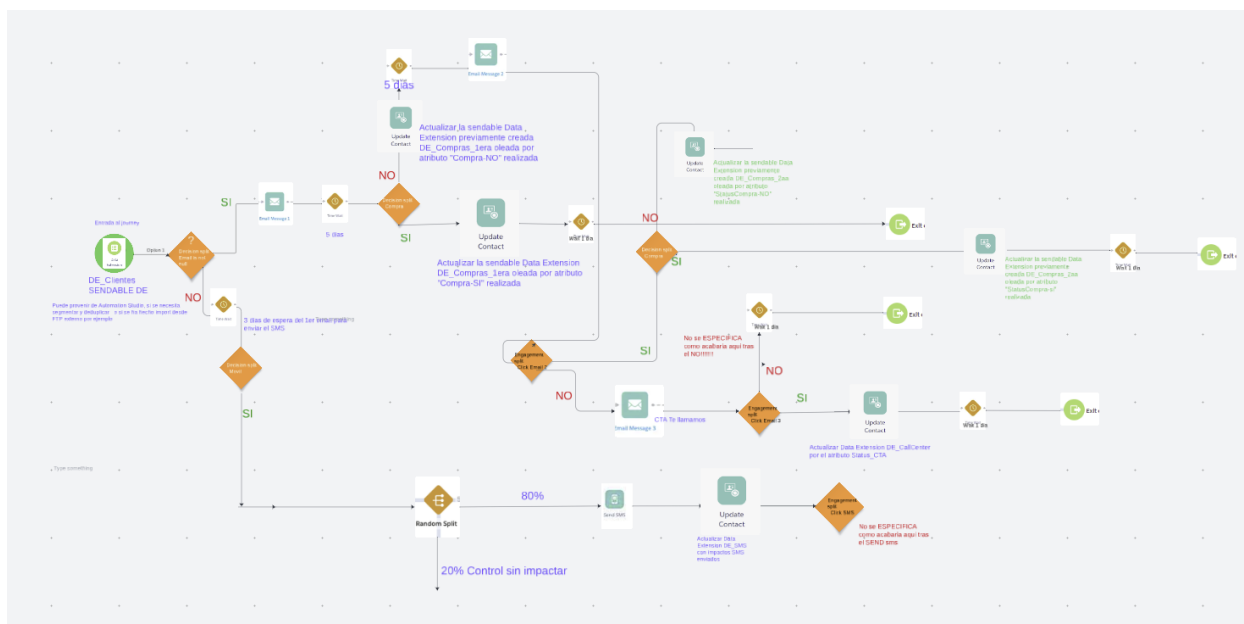
It will update the **Status_Purchase attribute** within the data extensions of each wave. The data extensions must be of type "Sendable" and must have the "Send Relationship". Each Update contact will relate the data extension corresponding to the corresponding wave: DE_Purchases_1st wave, DE_Purchases_2nd wave, DE_3rd wave, DE_CallCenter



This **Status_Purchase attribute** will be boolean type: True or False, which will correspond to the status of the purchase: yes in case of a purchase made, and to the status of the purchase: no in case of a purchase not made.

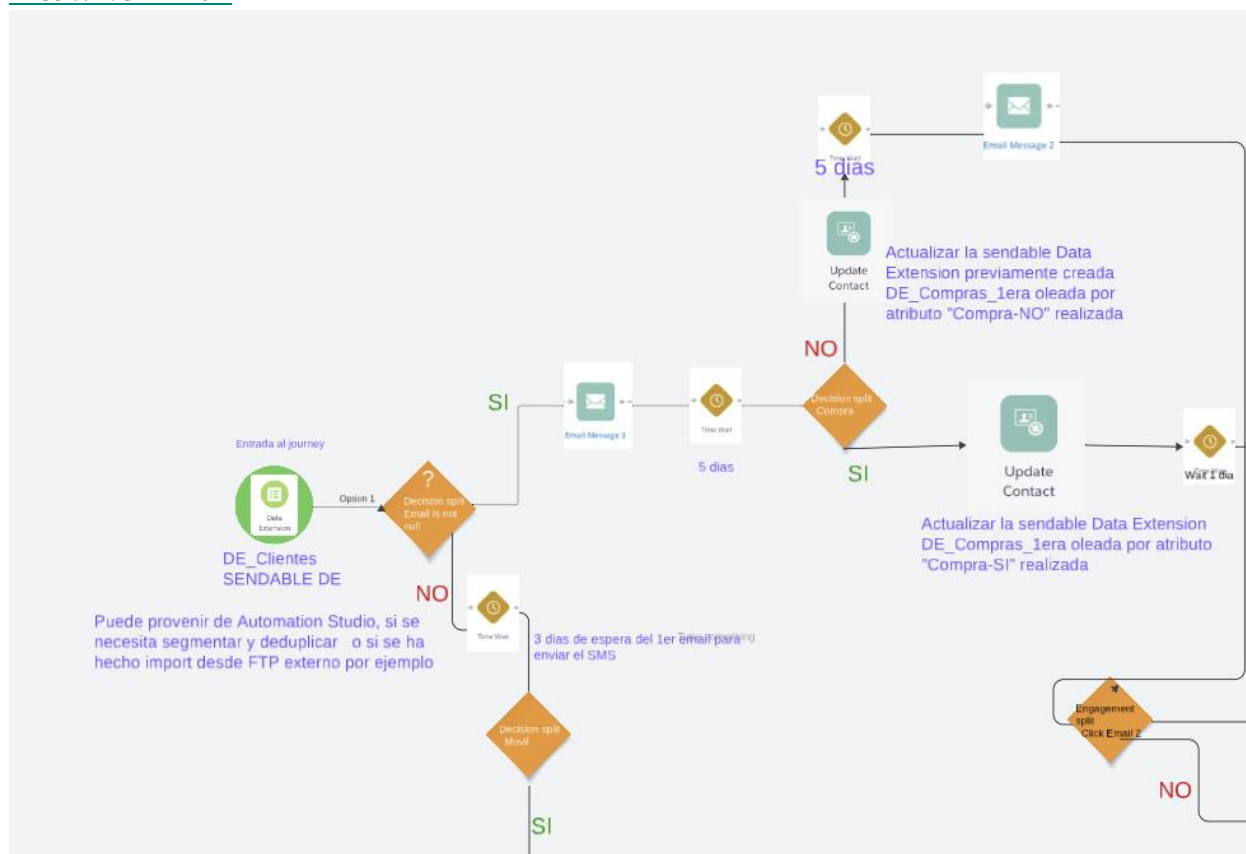
Follow the LucidChart link to view the complete Journey: *due to lack of Marketing Cloud I built the journey on LucidChart

https://lucid.app/lucidspark/6a9e4550-1db0-434b-a865-1ed3a9f05f92/edit?invitationId=inv_afa24279-0a7d-4e04-8a18-4924cf86247a&page=0_0#



Journey Description

First Wave Email 1



Entry source: Sendable Data extension DE_Cientes

Due to the unspecified details about where this data extension comes from and is located within the Marketing Cloud, it does not say where it may come from Automation studio where it has been refreshed and updated with Filter Activity, or perhaps it has gone through subscriber deduplication automation to that communications are not duplicated.

Decision Split I assume that 1st filter EMAIL IS NOT NULL. In case this input extension data comes directly from CloudPage without going through Automation which is a possible scenario, what this Decision split will do is that it will guarantee that the subscriber's email exists from the entry of the journey, and those that only If they have an email, they will be diverted by sending Email 1.

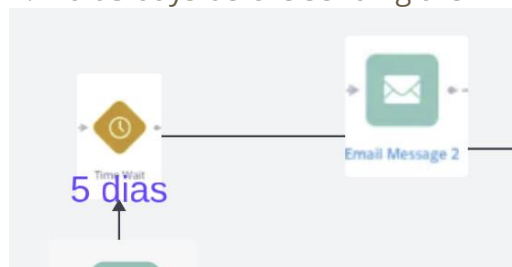
When email is not NULL is true, the Email 1 will be sent to the subscribers as we are now sure the have an email.

Decision Split . If EMAIL IS NOT NULL is FALSE they Will be prompted with another decision Split if they have a mobile number instead

Wait: 5 dias Before each Decision Split and Engagement Split, one Wait Activity must be set so that time is spent analyzing the data collected. I have put a 3-day wait between the sending of Email 1 and the Purchase Decision Split so that the customer has time to purchase if they wish from this Email 1

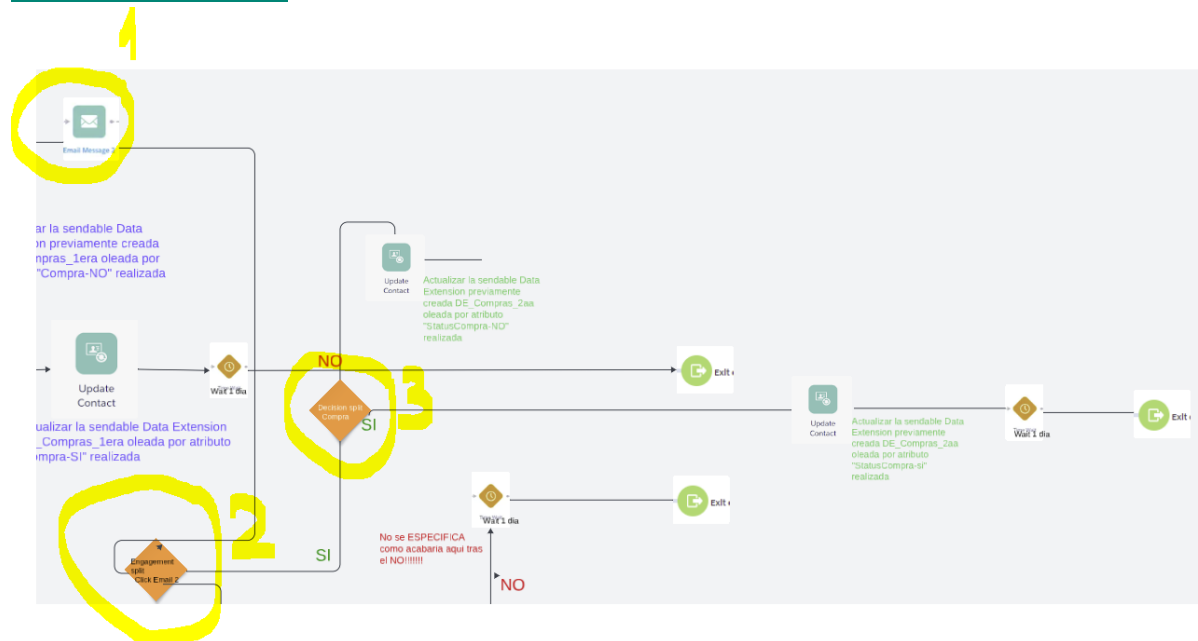


2. Wait 5 days before sending the 2nd email due to available requirements



Update Contact: In this first wave, the Update contact will update the DE_compras_1 erawave by the static attribute Status_compra - true or false

SECOND WAVE Email 2



Email 2 It will be sent 5 days after the sending of Email 1 due to the Wait of 5 days

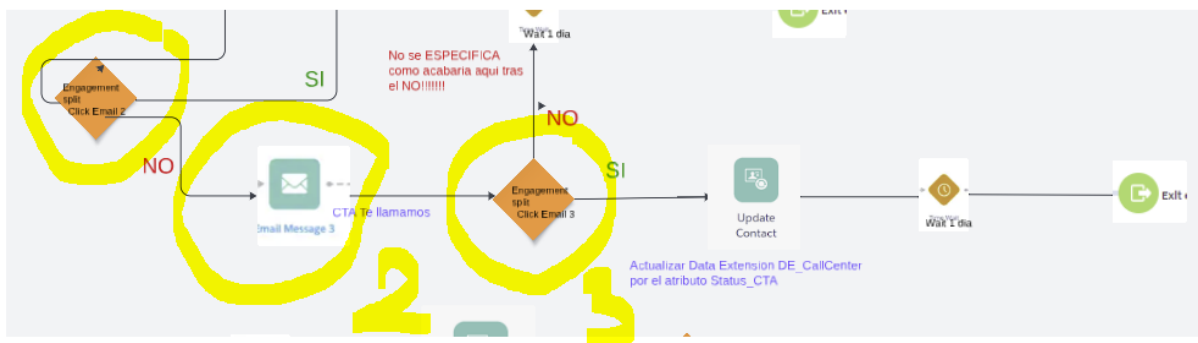
Engagement Split for Clicks Email 2 If they have clicked, they will be diverted to verify if they have purchased in the Decision split by Status_Purchase attribute

Wait between Engagement and Decision Split for MC to analyze the data.

Update Contact will Update the previously created sendable Data Extension DE_compras_2a wave by attribute "Purchase Status" whether made or not from the 2 ways of the Decision Split

THIRD WAVE Email 3 -CTA WE WILL CALL YOU

1

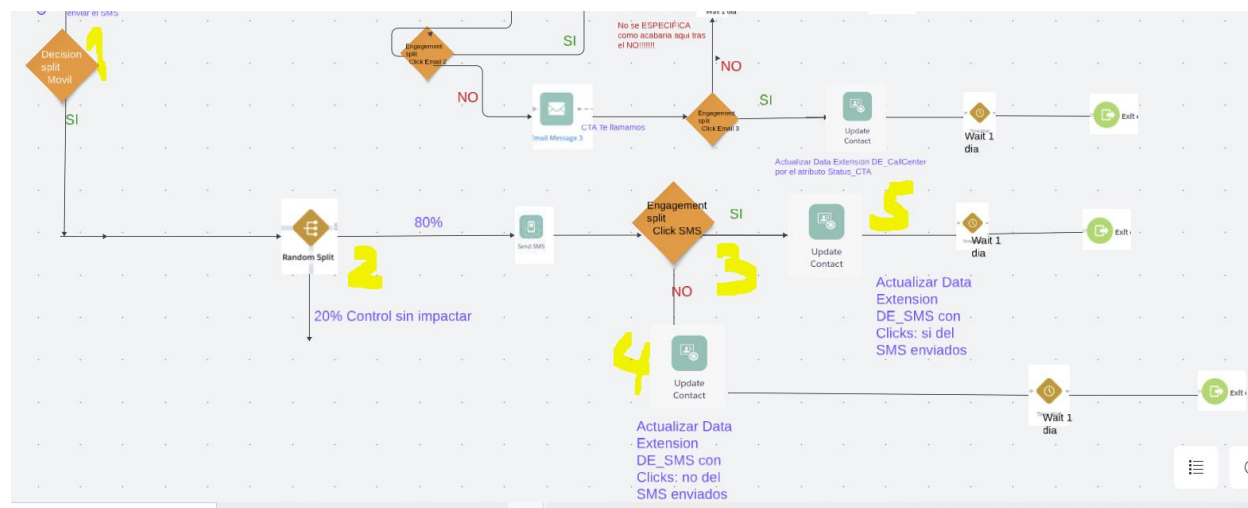


On the Engagement Split of Email 2 and the Branch of those who have clicked on Email the Email 3 will be sent with the call to action CTA WE WILL CALL YOU

Email 3 CTA WE WILL CALL YOU

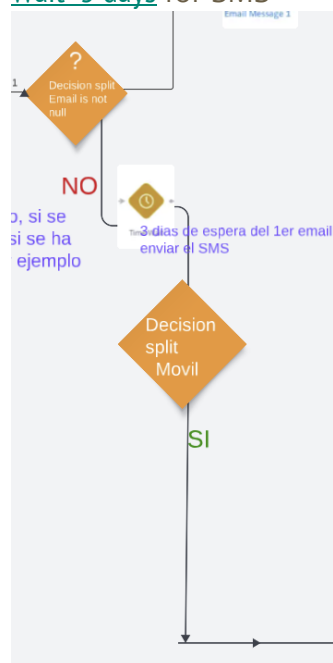
Engagement Split para Clicks del Email 3. Si hacen click el Update contact va a actualizar con valor estatico el Data extension DE_CallCenter por el atributo Status_CTA. Esta data extension se tendra que exportar al FTP y facilitar al Customer Service para que llamen al cliente lo antes posible. O si en caso de que hay CRM conectado a Marketing cloud y Service Cloud en marcha, incluso es posible crear una Task para que en el CRM se recibe alerta de tarea.

PATH FOR SUBSCRIBERS WITH NO EMAIL ADDRESS BUT HAVING MOBILE NUMBER



ON Decision Split inicial (1) nada mas entrar en el Journey EMAIL IS NOT NULL For those who do not have an email, they will be diverted by checking with another Split if they have a mobile number.

Wait 3 days for SMS



Wait de 1 DAY BEFORE EACHJ EXIT

Decision Split BRANCH HAVING MOBILE – I create a Random Split Control Group 20%

Random Split - the rest 80 % will receive SMS

Engagement Split FOR Click INSIDE THE SMS and with the result it will update the Update Contact of the Data Extension DE_SMS with Clicks: Yes or Clicks No of the SMS sent

El Journey Setting It is not specified AS A BUSINESS REQUIREMENT but it is AN ESSENTIAL SETTING in order to activate the journey:

SETTINGS

DATA

Contact Entry ⓘ

Select contact re-entry mode.

☐ No re-entry
 ☐ Re-entry anytime
 ☒ Re-entry only after exiting

I opt for Re-entry only after exiting

Goal & Exit Criteria: NOT SPECIFIED IN THE BUSINESS REQUIREMENTS

Automation Studio

Automation 1

SQL Activity for segmentation of purchases made per each wave that has the **Status_Purchase attribute: YES**

```
SELECT
    CustomerID,
    SubscriberKey,
    status_Compra
FROM
    DE_Compras_1eraoleada
WHERE
    status_Compra = 'True'
```

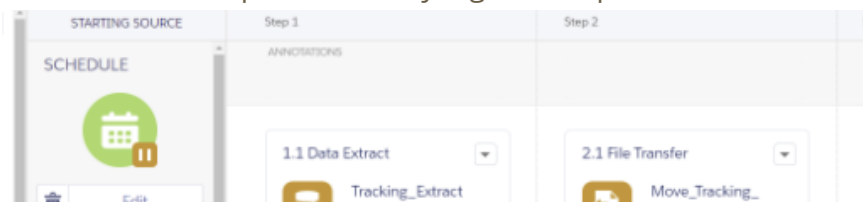
Automation 2

Data Extract of type data extract extensions in Automation Studio so that the purchases of each wave are exported to FTP automatically on a daily basis. The Export will be done for all the data extensions that have been contracted for each wave: **DE_compras_1st wave, DE_compras_2nd wave, DE_3rd wave, DE_CallCenter**

Step1 Data Extract type Data Extension extract in Automation Studio

Step 2 File Transfer with the option to Move from Safehouse to FTP

It is scheduled to perform every night at 11 p.m.



Automation 3

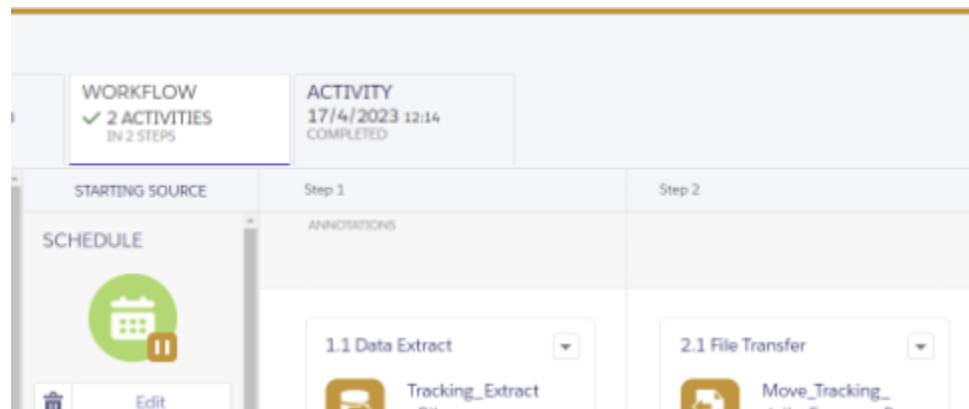
Data Extract of type Tracking extract of the impacts, Sends, clicks, in the last 30 days also by Data extract since the Journey is new and it is advisable to extract the last 30 days instead of the Data Views since the campaign would be new and initially not They will collect enough data to measure the Data Views.

Es recomendable automatizar un Tracking Extract automatizado de los envios, aperturas y clicks de las comunicaciones SENT/ENVIADAS del dia anterior. Se programa con Schedule para que se realice a diario esta exportacion al FTP a las 8 h de la mañana.

Step 1 Data Extract type [Tracking extract](#)

Step 2 File Transfer with the option to Move from Safehouse to FTP

It is programmed to act every day at 8 in the morning

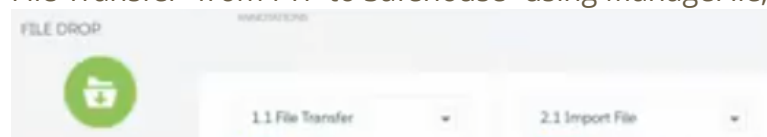


If it is with Data Views, it will be a Left Join SQL Activity between the DE and the data Views _Bounce, _Sent, _Click, _Open by the Subscriber key.

[Automation 4](#)

If an import has to be made to SFMC from FTP, this will be done with Import Activity in Automation studio with FileDrop input. If the file is in compressed zip format, this is done in 2 steps:

File Transfer- from FTP to Safehouse- using ManageFile, unzip and decrypt to Safehouse



Import Activity - from Safehouse to SFMC - assign target data extension and locate from ExactTarget Safehouse

If the file is in .csv format, only 1 step is preconfigured - the Import Activity

USE CASE 3 Automation exclusion

During the day we have 4 email campaigns planned. The priority campaign is DE_MASTER_CLIENTES.

It is possible that clients are part of more than one DE, and as a contactability policy we should not send more than 1 email per day to a client.

Primary key "CO_CLIENT"

Other DE:

DE_HOMEINSURENCE

DE_HEALTH

DE_AUTO

Option 1 SQL Query in Automation Studio

Segment the emails to ensure that the criteria that we should not send more than 1 email per day to a client will be respected with the Subscriber Keys of the DE_MASTER_CLIENTES

```
SELECT
  m.CorreoElectronico,
  m.Móvil,
  m.CO_CLIENT,
  m.Nombre,
  m.Apellido
FROM
  DE_MASTER_CLIENTES m
LEFT JOIN
  DE_HOME h ON m.SubscriberKey = h.SubscriberKey
LEFT JOIN
  DE_SALUD he ON m.SubscriberKey = he.SubscriberKey
LEFT JOIN
  DE_AUTO a ON m.SubscriberKey = a.SubscriberKey
LEFT JOIN
  DE_Exclusions_Today e ON m.SubscriberKey = e.SubscriberKey AND e.SendDate = CONVERT(DATE, GETDATE())
WHERE
  h.SubscriberKey IS NULL
  AND he.SubscriberKey IS NULL
  AND a.SubscriberKey IS NULL
  AND e.SubscriberKey IS NULL
  AND m.CorreoElectronico IS NOT NULL
  AND m.Móvil IS NOT NULL
```

Esta consulta sirve para seleccionar los clientes de la tabla DE_MASTER_CLIENTES que no están presentes en ninguna de las tablas DE_HOME, DE_SALUD, DE_AUTO y DE_Exclusions_Today con la fecha actual.

Esto asegura que los clientes no reciban más de un correo electrónico por día y solo selecciona aquellos con direcciones de correo electrónico y números de móvil válidos.

La tabla la tengo que crear adicionalmente DE_Exclusions_Today.

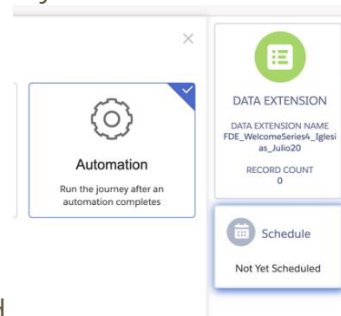
Contiene clientes que ya recibieron un correo electrónico hoy CON 2 filas de atributos:

CO_CLIENT text(255),

SendDate DATE.

Si el cliente está en esta tabla con la fecha actual, no será incluido en el resultado.

The result of this Query would be a new data extension that will come out of Automation studio and will serve as Entry Source for sending the Email. In Automation Studio in step 1 I would make this SQL Query and in Step 2 Email Activity directly or rather schedule this

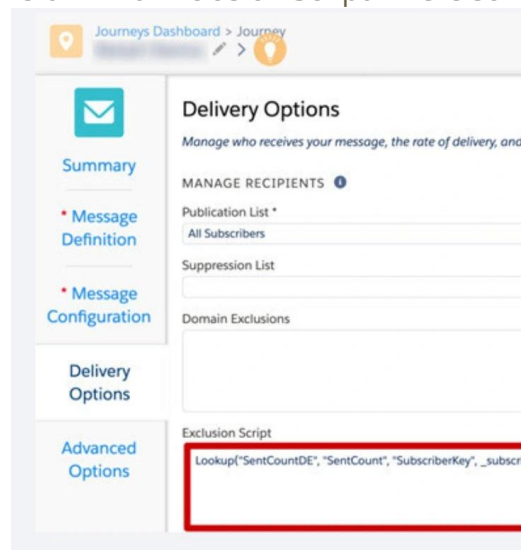


from entering JB as input through Automation in Scheduled.

Possible Solution 2

In Journey Builder I go to the Journey of the priority campaign with the data extension DE_MASTER_CLIENTES

I open the Email Send Activity of this journey - I must go to the Delivery Options tab on the left - I find Exclusion Script where some AMSCRIPT will be applied



```
RowCount(LookupRows("DE_HOGAR", "Email_Field", emailaddr)) > 0)
```

OR

```
RowCount(LookupRows("DE_SALUD", "EmailAddress", emailaddr)) > 0)
```

```
RowCount(LookupRows ("Name DE" , "columna name in the DE", AttributeValue("column name DEjourney")))> 0
```

RowCount(LookupRows ("Name DE" , "name column DE", AttributeValue("CO_CLIENTE")))> 0

Official Salesforce Resources for this solution

https://ampscript.com/using-an-exclusion-script-for-email-sends/#google_vignette

Possible Solution 3

To test before applying in Delivery options:

Put Ampscript Block in a copy of the same email before sending for testing.

```
%%[
VAR @clientId, @sendDate, @isExcluded
SET @clientId = AttributeValue("CO_CLIENTE")
SET @sendDate = FormatDate(Now(), "YYYY-MM-DD")

SET @isExcluded = RowCount(LookupRows("DE_Sent_Today", "CO_CLIENTE", @clientId,
"SendDate", @sendDate))
]%%
```

TreatAsContent(%%=v(@isExcluded)=%%) > 0

USE CASE 4

Reporting and Tracking

The task I have is to Generate the report in SFMKT for the Journey
4CESSVC101_RETARGETING_DELEGACIONES

SEVERAL WAYS FOR REPORTING OF A JOURNEY

Journey Analytics: Inside the same journey go to panel Analytics donde podemos

ver cómo han ido impactando los emails y SMS enviados

Journey tracking: in Email Studio < Tracking

We can access the tracking where we will see within the folder of each journey a report for each of the email activities that we have within the journey.

[Journey report](#): Within the catalogue of reports there is one dedicated to journeys that offers us information about the functioning of the journey in general and each branch in detail.

[Analitics Builder](#)-Reports-Journey Builder Email Send Summary

[Email Studio overview](#)-my tracking- Journey Builder sends

[Intelligence reports](#)- Journey Performance by email - you can put the Journey activity name and it gives you Sends, Opens, bounces, unique clicks, click to open rate (this option may not be available depending on the Marketing Cloud license that the company has)

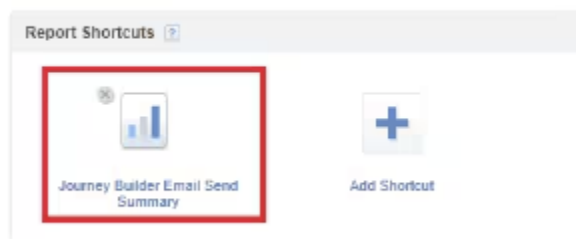
Solution USE CASE 4

Go to [Analitics Builder](#)-Reports-Journey Builder Email Send Summary



Mark Journey Builder Email Send Summary

Overview



Under Report parameters assign the desired dates
 Select the Journey
4CESSVC101_RETARGETING_DELEGACIONES.
 Click Submit.

This report cannot be viewed as a webpage. You must choose another delivery option from the Results page after submitting these parameters.

Report Source Journey Builder Email Send Summary

Report Parameters

Date Range * Custom
 From 01/01/2018 To 01/08/2019

Journey(s) *
 ALL
☒ Lead Journey

Version(s) *
 ALL
☒ Running & Finishing
☒ 2

Culture Code * English (United States)

Time Zone * (GMT-05:00) Eastern Time (US & Canada) *

* Denotes this time zone honors daylight savings time

[Cancel](#) [Submit](#)

Choose to be sent by email

[Back to Overview](#)

Results: Journey Builder Email Send Summary

This report cannot be viewed as a webpage. You must choose another delivery option such as Email, PDF, or Save and Compare.

Report Parameters

Start Date	01/01/2018
End Date	01/08/2019
Journey(s)	Lead Journey
Version(s)	Running & Finishing 2
Culture Code	English (United States)
Time Zone	(GMT-05:00) Eastern Time (US & Canada) *

If I need this Report every x time I can assign it to be sent on a recurring basis but first I have to save it to give me this option.

[Back to Catalog](#)

Results: Test

Success: This report has been saved to your reports overview. To view the details, view the Report Definition.

[Save](#)