DCE2.0 Lead Form

Created by Krnac, Zdenko (contracted), last modified on Mar 28, 2024

0. Overview

New feature has been implemented globally for Organic markets on their DCE2 website (iqos.com) which is built by Adobe Experience Manager - AEM (CMS). Markets can create their own form (they can customize used items like first name, last name...) to gather leads or to allow existing customers to register for a specific campaign (e.g. Valentine's day, Black Friday...). List of submitted forms (list of IDs) will flow to MC for following use.

1. Process out of MC

1. Market requests a campaign related to lead form via standard process (MOS ticket)
2. MOS/HUB must create a "**campaign id**" in Accutics (as for regular campaign) and provide this ID to market
3. Market configures a form on their website with provided "campaign id" - this will be used as a unique identifier for the campaign
4. Market activate the form - data will start to flow to MC (every hour)
    a. Unknown customers (those who are not registered yet) are going through the registration process - we will receive real Gigya ID.

2. MC Setup

1. Data are stored in **Parent BU** in "Data extensions/Import/LeadGenCampaign"
    a. LeadGenerationFormCampaigns - contains all users who submitted the form
        i. https://mc.s50.marketingcloudapps.com/contactsmeta/admin.html#admin/data-extension/47761a8f-8774-ed11-a5df-f40343dfba28/records
        ii. CampaignId - unique identifier of campaign (Accutics ID)
        iii. Processed - it was already moved to DE for campaign (our target DE - explained below in section 3)
        iv. Details - JSON payload of all attributes sent from market to MC
    b. LeadFormCampaignConfig - list of DEs data need to be copied to
        i. https://mc.s50.marketingcloudapps.com/contactsmeta/admin.html#admin/data-extension/13f8af58-8374-ed11-a5df-f40343dfba28/properties/
        ii. active - means if data still needs to be copied (can be changed after sendout to false to save performance)
    c. LeadGenCampaign_automationLog - log for automation (for errors)
        i. https://mc.s50.marketingcloudapps.com/contactsmeta/admin.html#admin/data-extension/153316ff-8774-ed11-a5df-f40343dfba28/properties/

3. What must be done by MOS

1. You need to create **shared DE** in child BU and share it to parent
    a. This DE needs column names **same** as in entry source (LeadGenerationFormCampaigns)
        i. Standard columns: SubscriberKey, EmailAddress, SubmissionId, CampaignId, Country, Processed
        ii. For payload: you need to have same column name as the key defined in payload, e.g. "phone_number" : "123123" then "phone_number" is the column name
2. You need to add the external key (better to use meaningful name instead of auto generated key) of your DE to Config DE in parent (LeadFormCampaignConfig) so data will flow to this table

3. Then you have 2 options
    a. You will use this DE (shared with data) directly as entry source for your campaign (journey)
    b. You will use this DE as a source and use these data as you need for another DE in child BU which will be the entry source for your campaign

Warning: Be careful that unknown users can't exist right away in our tables coming from TD as it is real time. We will have info about them later on once data are synced...

4. Other resources

- DCE2 documentation (with flow how is customer navigated during the process): Lead data form process management
- AEM doc: DCE20HOME:Solution Design
- Other doc: 162653 - Ability to create forms for lead gen campaigns - Data Impact Assessment
- MC Config team doc: CONSGOV-5598

5. Other info

- "Campaign ID" value is stored in Identity table in **"registration_campaign_id"** and **"registration_event_id"** column for **new leads** and in **"profile_event_id"** for **existing customers** (after tests with SK/CZ records)
    - updated 10.3.2023 by Katarina Polievka
    - clarification for which use-case the value is there is in progress (lead/existing user, 1st/last value)
- You can send communication right after you receive data from Lead form - no need to merge (and wait) with TD data (join with Identity table)
- Data should be available right away in parent BU, hourly in child BU
- To distinguish between new user (lead) and existing user (already a customer) - no clarification yet but global segments could be used (as lead does not have too many segments like MGM, LSS...)
    - updated 27.2.2023 by Marko and Erdo

No labels