jnm




Version: 4.1.0

Published date: October 2023

Copyright © 2023 by ESW. All rights reserved. Information contained herein is subject to change without notice.

# **ESW- Share Marketing Opt-In**

INTEGRATION GUIDE

**SFCC - ESW Cartridge**

+

Contents

[**ESW- Share Marketing Opt-In** 1](file:///C:\ESW-Repo\salesforce-plugin\link_eshopworld\documentation\eShopWorld_ESW_Share_Marketing_&_SMS_Opt_In_Integration.docx#_Toc148025746)

[**1** ESW Marketing Opt-In 3](#_Toc148025747)

* 1. [Benefits 3](#_Toc148025748)
  2. [ESW Marketing opt-in Configuration in the Customer profile 4](#_Toc148025749)
  3. [First-time Experience- New shoppers without Email Marketing opt-in & SMS Marketing opt-in selection to ESW checkout 5](#_Toc148025750)
  4. [Repeat Opt-in selected Shoppers Experience- Returning Shoppers are presented with the Email Marketing opt-in & SMS Marketing opt-in selected on ESW checkout 6](#_Toc148025751)
  5. [Testing Sandbox/Staging Environment 6](#_Toc148025752)

# **ESW Marketing Opt-In**

* 1. Benefits

Following are some benefits of using the ESW marketing opt-in feature.

* This ESW opt-in allows retailers to create separate newsletters or intimidation emails for ESW opted-in shoppers. The ESW cartridge also supports SMS opt in
* Registered Shoppers stored opt-in preference value can be passed to the pre-order payload, which will turn on opt-in preference on ESW checkout for already opted-in shoppers.
* The registered shoppers will be able to opt-out by unchecking opt-in preference on ESW checkout.

In addition to checkout shoppers’ registration, Retailers can store opt-in shoppers’ lists on the marketing cloud, i.e. (SFMC, Bronto).

How does this work?

**ESW Email Marketing Opt-in:**

The following flow depicts how marketing opt-in works. Flow is divided into two steps according to customers.

1. **Customer checks out**

When the shopper adds an item to their cart and clicks Checkout, the following steps occur:

* 1. If the customer is logged in and has checked the opt-in custom profile preference, the eswMaretingOptIn meta field is added to the pre-order request with a value of true. This will cause the customer to be opted in to marketing emails on the ESW checkout page.
  2. If the shopper is a first time shopper, a guest customer or has unchecked the opt-in custom profile preference, the eswMaretingOptIn meta field is added to the pre-order request with a value of false. This will cause the customer to be opted out of marketing emails on the ESW checkout page.

1. **ESW updates the order configuration in SFCC.**

Once the shopper has checked out and the order has been placed successfully, ESW order confirmation webhook calls SFCC endpoint to update the order attributes in SFCC.

* 1. If the customer checked the marketing opt-in preference on the ESW checkout page, ESW will update the customer's eswMaretingOptIn profile preference in SFCC to true.
  2. If the customer unchecked the opt-in preference on the ESW checkout page, ESW will update the customer's eswMaretingOptIn profile preference in SFCC to false.

**ESW SMS Marketing Opt-in:**

The following flow depicts how SMS marketing opt-in works. The flow is divided into two steps:

1. **Customer checks out**

When the shopper adds an item to their cart and clicks Checkout, the following steps occur:

* 1. If the customer is logged in and has checked the SMS marketing opt-in custom profile preference, the eswSMSOptin meta field is added to the pre-order request with a value of true. This will cause the customer to be opted in to SMS marketing on the ESW checkout page.
  2. If the shopper is a first time shopper, a guest customer or has unchecked the SMS opt-in custom profile preference, the eswSMSOptin meta field is added to the pre-order request with a value of false. This will cause the customer to be opted out of SMS marketing on the ESW checkout page.

1. **ESW updates the order configuration in SFCC.**

Once the shopper has checked out and the order has been placed successfully, ESW order confirmation webhook calls SFCC endpoint to update the order attributes in SFCC.

* 1. If the customer checked the SMS opt-in preference on the ESW checkout page, ESW will update the customer's eswSMSOptin profile preference in SFCC to true.
  2. If a registered customer unchecked the SMS opt-in preference on the ESW checkout page, ESW will update the customer's eswSMSOptin profile preference in SFCC to false.
  3. For guest shoppers, if a profile is found with the email used in order then the profile attribute will be updated only if the shopper checked the SMS marketing optin. This means that if the customer did not check the SMS marketing optin checkbox on ESW checkout, there would be no change in the profile attribute
  4. Guest shoppers who register after placing an order using the post-registration feature will have their SMS opt-in value populated on their newly created profile.

**Note**: If any third party is used to manage marketing optin, the ESW cartridge’s functions can be customized to meet the to meet the requirements for both the order confirmation and checkout API endpoints.

* 1. ESW Marketing Opt-in Configuration in the Customer profile

Customer profiles can be used to manage ESW opt-in, allowing merchants to create separate newsletters for opted-in shoppers. To access customer profiles, navigate to **Merchant Tools > Customers > Customer Profile.**

**ESW Marketing Opt-in Attributes**

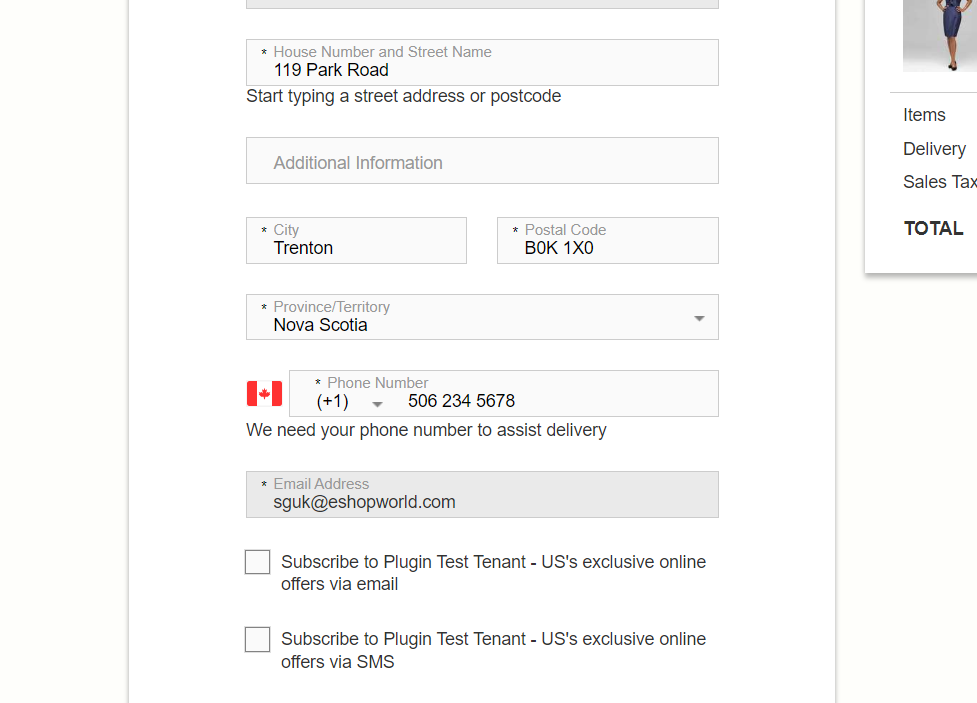
Each customer profile will include the following attributes:

* **ESW Email Marketing Opt-in:** This attribute determines whether the customer is opted in to ESW marketing emails.
* **ESW SMS Marketing Opt-in:** This attribute determines whether the customer is opted in to ESW SMS marketing.

Merchants can use these attributes to filter their customer list and send targeted marketing messages.

* 1. First-time Experience- New shoppers without Email Marketing opt-in & SMS Marketing opt-in selection to ESW checkout

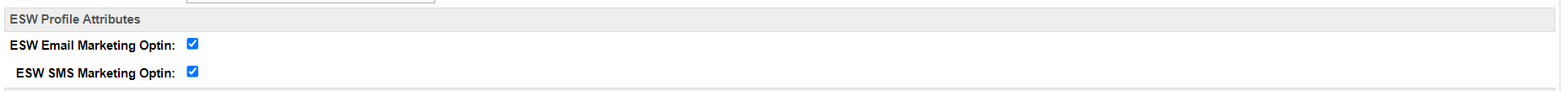
****

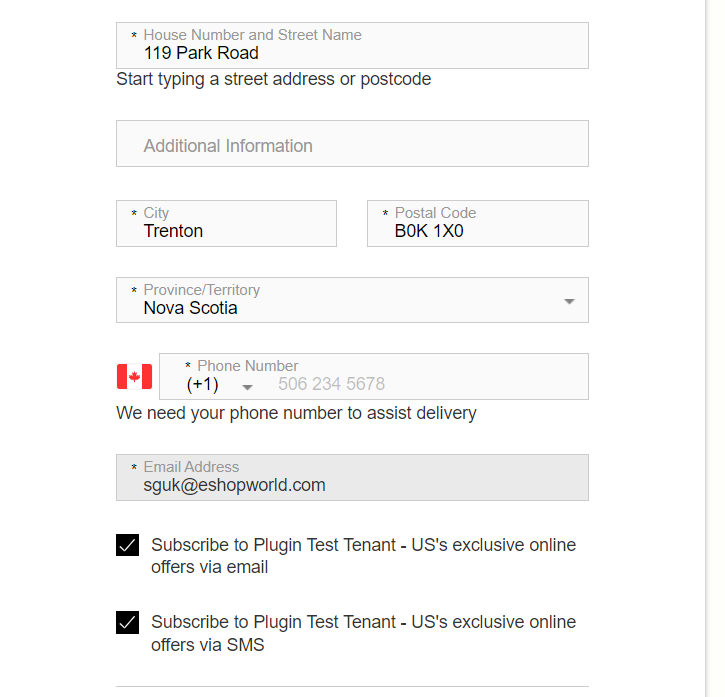
****

Once the order is placed with the above checkboxes checked. The information is updated in SFCC as well.

****

* 1. Repeat Opt-in selected Shoppers Experience- Returning Shoppers are presented with the Email Marketing opt-in & SMS Marketing opt-in selected on ESW checkout





* 1. Testing Sandbox/Staging Environment

There are two options to test this feature in a sandbox/staging environment.

1. Create an order with a newly registered customer following the ESW checkout flow.
2. Review that the registered customer profile custom attributes is set to false.



1. On ESW checkout, select the Email marketing opt-in or SMS marketing opt-in checkbox to be true and place the order.

A screenshot of a mail box

Description automatically generated

1. Check customer’s profile custom attributes is set to true.



1. Place an order with the existing account and opted-in for customer preference.
2. Review that the registered customer profile custom attributes are set to true  
   
3. On ESW checkout, confirm and deselect the Email marketing opt-in & SMS marketing opt-in checkbox to true and place the order.

A screenshot of a mail box

Description automatically generated

1. Preview the customer’s profile to confirm if the Email marketing opt-in & SMS marketing opt-in reverted to false.

