



Opt-In, Opt-Out & Shake it all about with the Marketing App Extension



Oliver Monty
Capgemini, Consultant



Emily Mann
Capgemini, Consultant

Agenda

- Background
- The Challenge
- The Solution
- The Journey
- The Setup [Live Demo]
- The Outcome [Live Demo]
- Observations
- Final Thoughts
- Q&A



The Background...



Salesforce Consent Model

- Growing importance of Data Privacy and Consent
- Salesforce's Consent Management Objects
- All about the individual's entire experience, not just a single contact point
- Manage the level of granularity depending on regulatory requirements

Individual

Contact Point Email

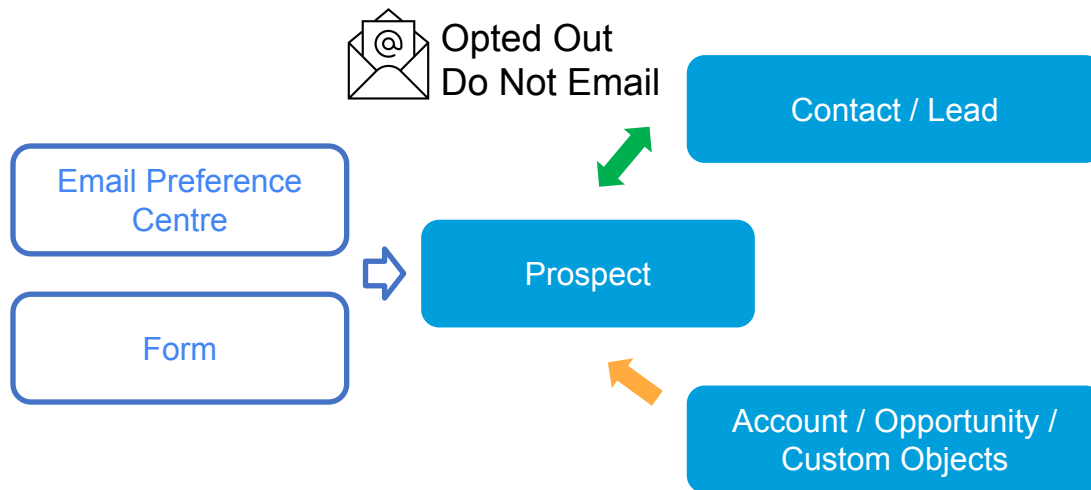
Contact Point Phone

Contact Point Type
Consent

Brand

Data Use Purpose

Consent in MCAE

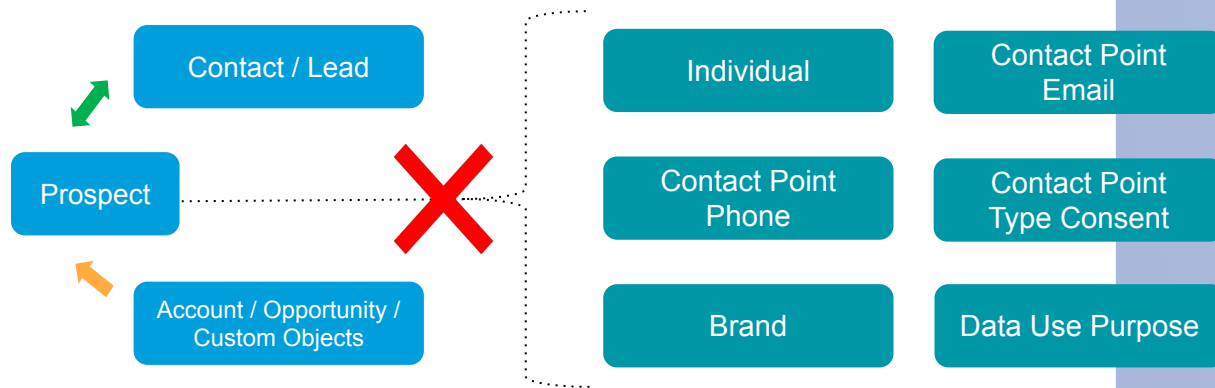


The Challenge...



The Challenge

- Consent model complexity
- Heavy configuration
- Limitation of external systems that AE can communicate with
- Marketers lack visibility and control over SF consent records



The Solution...



Marketing App Extension & External Actions

Marketing App Extension is an integration point that allows AE to communicate with external systems.

External Actions*

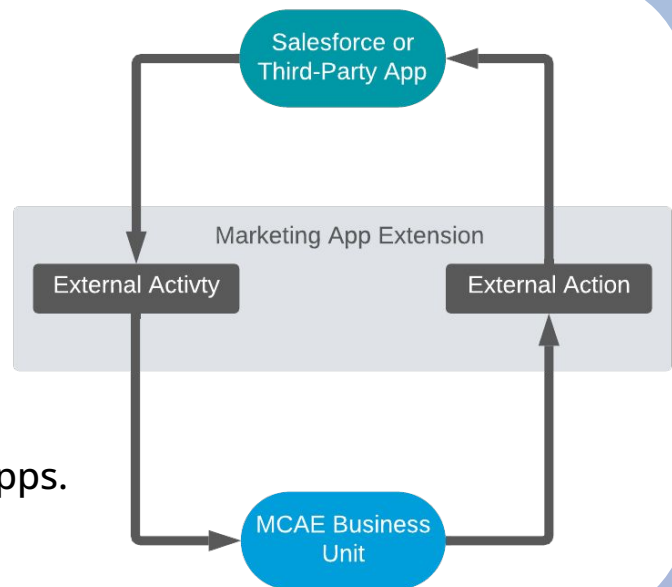
Initiate actions **to** third-party apps.

- Trigger an SMS send
- Register a customer for an event via a webinar provider

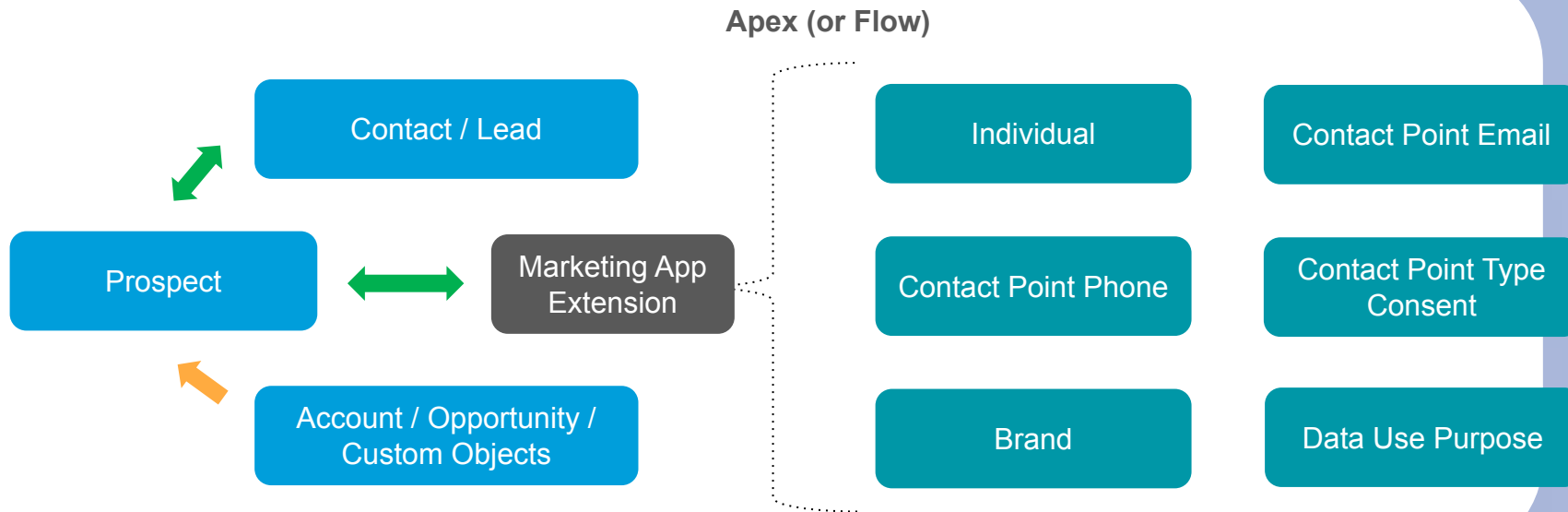
External Activity

Ingest activity data that originates **from** third-party apps.

- Record SMS engagement
- Monitor webinar attendance

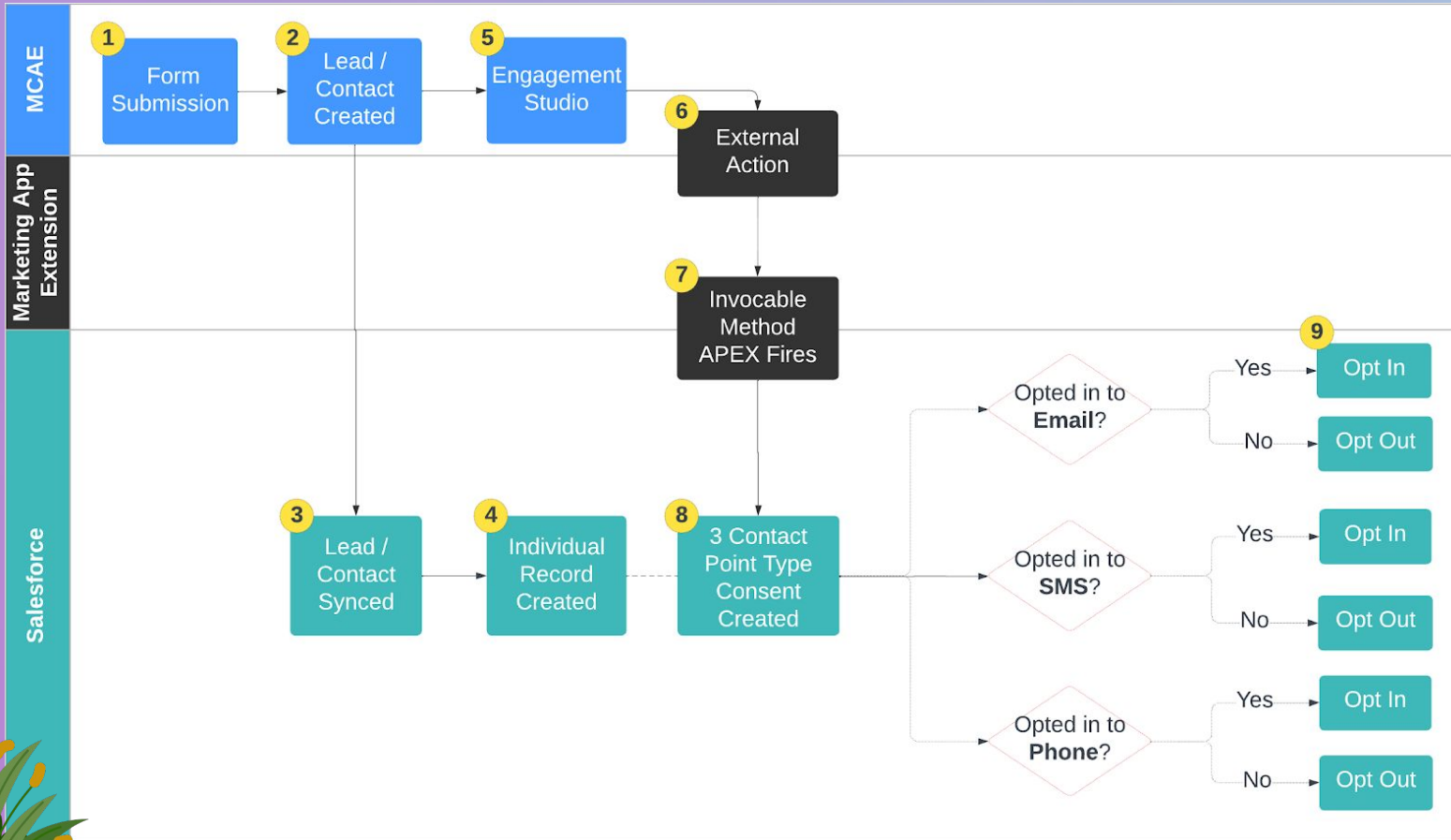


The Solution



The Journey...



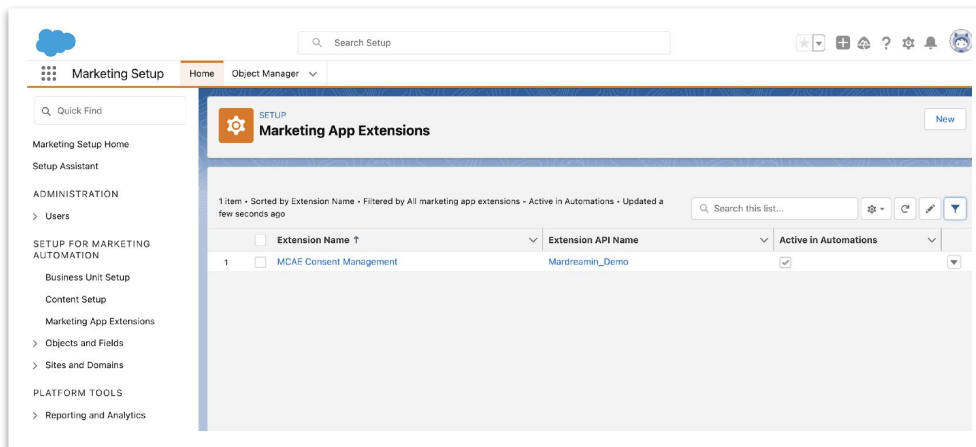


The Setup...



Part 1: Creating the App Extension

- AE's Marketing Setup > Marketing App Extension > New
- Assign to a Business Unit
- Tick 'Active in Automation'

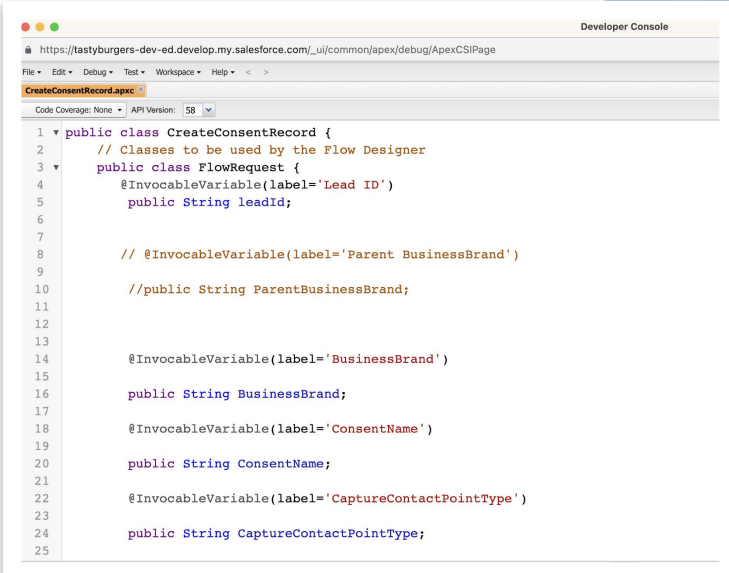


The screenshot displays the 'Marketing Setup' interface. The main heading is 'Marketing App Extensions'. Below this, there is a table with one item. The table has columns for 'Extension Name', 'Extension API Name', and 'Active in Automations'. The item listed is 'MCAE Consent Management' with the API name 'Mardreamin_Demo' and the 'Active in Automations' checkbox checked.

Extension Name	Extension API Name	Active in Automations
<input type="checkbox"/> MCAE Consent Management	Mardreamin_Demo	<input checked="" type="checkbox"/>

Part 2: Creating the Invocable Code

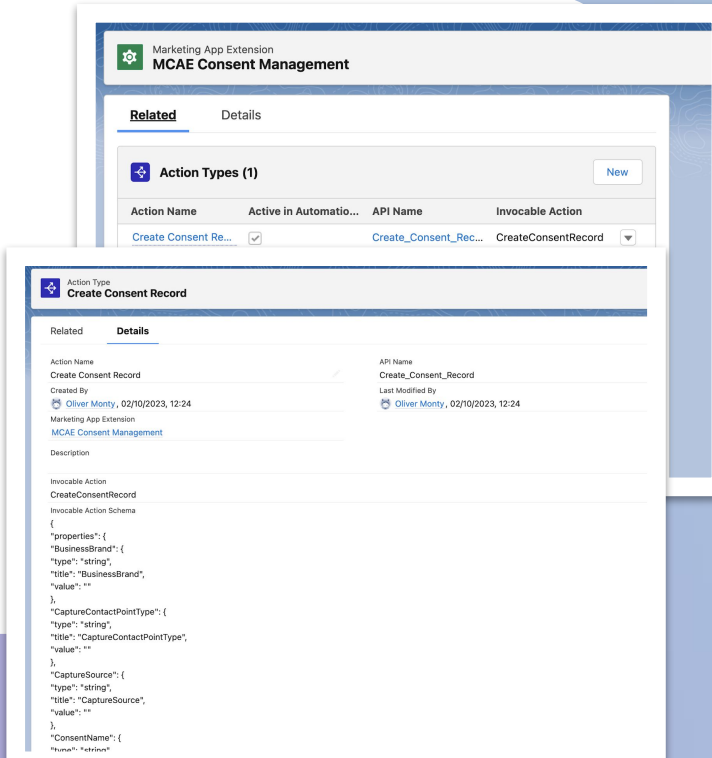
- Create the instruction in Salesforce that you want your External Action to trigger.
- Classes: to open consent record parameters up to AE.
- Build using either: Apex class vs. SF Flow (full – low code). Recommended: work with a Developer if you use Apex!



```
1 public class CreateConsentRecord {
2     // Classes to be used by the Flow Designer
3     public class FlowRequest {
4         @InvocableVariable(label='Lead ID')
5         public String leadId;
6
7
8         // @InvocableVariable(label='Parent BusinessBrand')
9
10        //public String ParentBusinessBrand;
11
12
13
14        @InvocableVariable(label='BusinessBrand')
15        public String BusinessBrand;
16
17        @InvocableVariable(label='ConsentName')
18        public String ConsentName;
19
20        @InvocableVariable(label='CaptureContactPointType')
21        public String CaptureContactPointType;
22
23
24
25    }
```

Part 3: Creating the External Action

- Back in the Marketing App Extension, create a new Action Type.
- Select the Invocable Action you want to associate it with – the SF instruction in the previous step.
- This will automatically bring in the JSON Schema package underneath.
- Once again tick 'Active in Automations'.



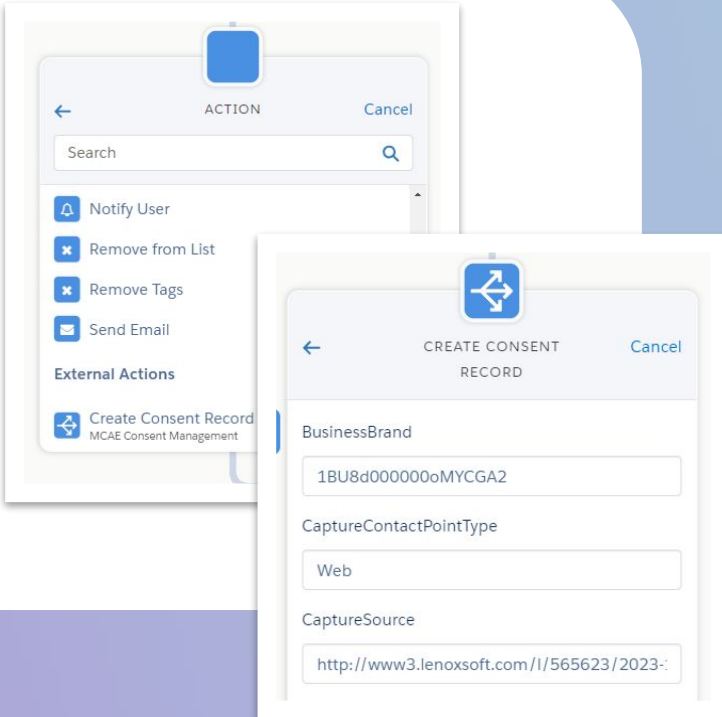
The screenshot displays the Salesforce Marketing Cloud interface for creating a new Action Type. The top section shows the 'Marketing App Extension' and 'MCAE Consent Management' details. Below this, a table lists the 'Action Types (1)' with columns for 'Action Name', 'Active in Automations', 'API Name', and 'Invocable Action'. The 'Create Consent Re...' entry is checked for 'Active in Automations' and has 'Create_Consent_Rec...' as the API Name and 'CreateConsentRecord' as the Invocable Action.

The bottom section shows the 'Details' for the 'Create Consent Record' Action Type. It includes fields for 'Action Name', 'Created By', 'Marketing App Extension', 'MCAE Consent Management', 'Description', 'Invocable Action', 'Invocable Action Schema', and 'JSON Schema'. The JSON Schema is displayed as follows:

```
{
  "properties": {
    "BusinessBrand": {
      "type": "string",
      "title": "BusinessBrand",
      "value": ""
    },
    "CaptureContactPointType": {
      "type": "string",
      "title": "CaptureContactPointType",
      "value": ""
    },
    "CaptureSource": {
      "type": "string",
      "title": "CaptureSource",
      "value": ""
    },
    "ConsentName": {
      "type": "string"
    }
  }
}
```

Part 4: Adding to your Marketing Assets

- Add as a step in Engagement Studio (or as a Completion Action)
- Choose the Pardot consent data you want to send across to Salesforce using the parameters



The image shows two overlapping screenshots from the Pardot Engagement Studio interface. The background screenshot displays the 'ACTION' menu with a search bar and several options: 'Notify User', 'Remove from List', 'Remove Tags', 'Send Email', and 'External Actions' which includes 'Create Consent Record (MCAE Consent Management)'. The foreground screenshot shows the 'CREATE CONSENT RECORD' form with the following fields:

- BusinessBrand**: 1BU8d000000oMYCGA2
- CaptureContactPointType**: Web
- CaptureSource**: <http://www3.lenoxsoft.com//565623/2023->



**TIME TO SHAKE IT ALL
ABOUT WITH A DEMO...**

Creation of Consent Records



Your communication preferences...

Update of Consent Records



Your communication preferences...

Check the boxes below for the communication channels you would like to be contacted through.

Observations...



Flexibility

HML (Handlebar Merge Language)

- Use HML merge fields to automatically populate Account Engagement data when the action executes.

ConsentName

```
{{Recipient.FirstName}} {{Recipient.LastN
```

Successor to 3rd Party Connector Apps

- Retirement of older MCAE Connector Apps limited to a product (e.g. Webex)
- Marketing App Extension offers an agnostic approach to integration.

Overcome traditional limitations

- SMS

Create Connector

CRM Connectors

~~NetSuite~~ ~~salesforce.com~~ ~~SugarCRM~~ ~~Microsoft CRM~~

Webinar Connectors

~~WebEx~~ ~~ReadyTalk~~ GoToWebinar

Other Connectors

Google AdWords Google Analytics Twilio bitly bit.ly Olark UserVoice

Social Media Connectors

Scalability

3rd-party Consent Validation

- Validate consent with external services.
- External Actions can communicate with external consent management systems.

Cross-System Consent Sync

- For organisation using multiple marketing and CRM systems, External Actions can synchronise consent data across these systems.
- Ensure consistency and accuracy of preferences.

Auditing

External Actions Error Table

- Identify, diagnose, and resolve errors from third-party apps tied to your automations.

External Actions Use/Limits

- Review all third-party app usage.

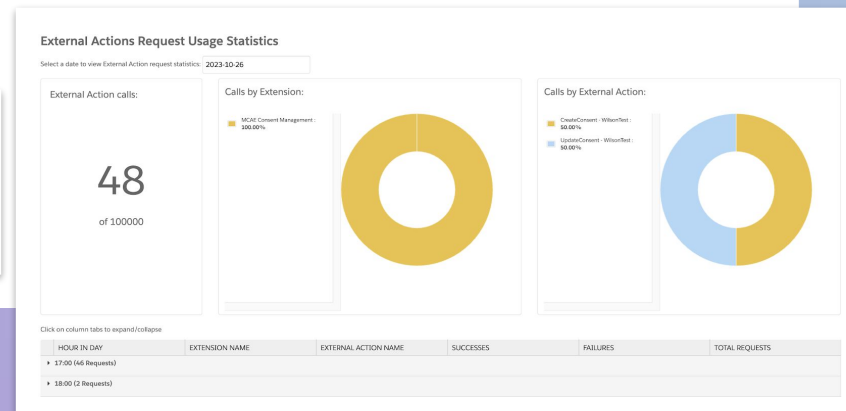
Daily External Activity API Limits ⓘ	0 daily external activity api limits	100,000	<input type="text" value="0%"/>
Concurrent External Activity API Requests ⓘ	0 concurrent external activity api requests	5	<input type="text" value="0%"/>
Rate Limit External Activity API Requests ⓘ	0 rate limit external activity api requests	200	<input type="text" value="0%"/>
Daily External Action Calls ⓘ	0 daily external action calls	100,000	<input type="text" value="0%"/>

Account Engagem... Dashboard Prospects Campaigns Automations Account Engagement Email Account Engagement Settings More

External Action Errors

Filter:

EXTENSION	ACTION	AUTOMATION TYPE	ASSET TYPE	ERROR MESSAGE	PROSPECT	OCCURRED AT
MCAE Consent Management	CreateConsent - WilsonTest	Engagement Studio	Consent Management (Create /Update)	Client Error, could not invoke action 6523daf6f8a3db on prospect id 45756905: Bad Request (HTTP STATUS CODE: 400) Response: [{"message": "You don't have access to the Apex class: UpdateConsent","errorCode":"INSUFFICIENT_ACCESS"}]	Oliver Monty	2023-10-09 06:48:16
MCAE Consent Management	UpdateConsent - WilsonTest	Engagement Studio	Consent Management (Create /Update)	Client Error, could not invoke action... (show)	Isaac Frimpong	2023-10-09 06:48:16



Final Thoughts

Great for

- Complex consent management needs
- Consent expiry / renewal
- Teams with good Apex code or Flow support
- Marketers who require more control over SF consent
- The future (retirement of MCAE 3rd party Connectors)

Not so great for

- Basic consent management
- Teams with limited Apex or Flow knowledge – support needed



Thank You!

Special thanks to:
Wilson Gong
MV, SHIVSANKAR

Articles & Resources:
Nathaniel Sombu
Carl Mortimer

You for watching!

Q&A

