



Aprimo Salesforce Einstein Connector Guide

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1. Introduction

Salesforce Einstein Content Selector is an AI platform that can detect patterns in a customer's engagement with content and recommend content for your emails to best suit their interests.

With Aprimo's Salesforce Einstein connector, manage your assets for Einstein in the Aprimo DAM and automatically push content to a CDN as well as create the catalog file needed for Einstein.

Einstein Recommendations use the catalog file and will analyze your asset metadata combined with your Salesforce data, using their machine learning software and filter its recommendations based on the analyzed attributes.

2. DAM Assets for Einstein

The Aprimo DAM – Salesforce Einstein connector will identify Aprimo assets classified with a specific classification and generate a Catalog File for the user to then upload directly to Einstein. The connector runs on a schedule, pulls the metadata for qualified assets, pushes the assets out to Akamai CDN if they are not already pushed, generates the catalog file, and then places it in an SFTP.

The classification the connector will search in to find qualified assets is configurable.

The Aprimo Akamai Connector is a required prerequisite for this connector, as Einstein requires that all images have already created public URLs. The connector will automatically push content out to the CDN.

3. The Catalog File

Metadata Definitions

The connector can be configured with DAM metadata fields to map over Aprimo metadata into the Einstein catalog file. The below table shows the fields required by Einstein. In the below screenshot “Author”, “Title”, “Abstract”, and “Goal Value” are custom Einstein fields. The connector can map Aprimo metadata to both the Einstein base fields and the custom fields. The connector supports text, numeric, date, and option list fields.

	A	B	C	D	E	F	G	H	I	J	K	L
1	AssetName	AssetClass	ImageURL	LinkURL	Available	StartDate	EndDate	Fallback	Author	Title	Abstract	Goal Value
2	Aprimo_f89b05f72	Aprimo_Events	https://aprimoakamaiconnector.akamaized.net/prod/	https://aprimo.com/myEvent	Y	5/10/2020	11/18/2020	N	Aprimo	SummerSy	Add To Einstein Collection	1
3	Aprimo_6c48f746	Aprimo_Sales	https://aprimoakamaiconnector.akamaized.net/prod/	https://aprimo.com/mySalesPromotion	Y	5/5/2020	5/21/2020	N	Aprimo	FakeSales	This is an asset	1
4	Aprimo_1eb16511	Aprimo	https://aprimoakamaiconnector.akamaized.net/prod/	https://aprimo.com/myRegisterPage	Y	4/12/2020	11/18/2020	N	Aprimo	AprimoIco	Microphone	1

Field Name	Description
AssetName	Unique identifier that is generated by Aprimo. The format is: Aprimo_[Aprimo Record GUID] This value is required by Einstein and is automatically generated by Aprimo.
AssetClass	A group or set of assets that can be selected and displayed interchangeably in a message content block. Asset classes are used to group related images that are commonly used in marketing messages. The connector will require a metadata field in Aprimo that has each AssetClass that has been defined in Salesforce as a selectable value. This value is required by Einstein and must be populated on the DAM record, or your file upload will fail.

ImageURL	An internet accessible URL where the content is stored. The connector will use the Akamai CDN URL for this value. This value is required by Einstein and will be automatically populated by the connector.
LinkURL	The URL that the user will be redirected to upon clicking the image. This field will be mapped from an Aprimo text metadata field and must be populated. This value is required by Einstein and must be populated on the DAM record, or your file upload will fail.
Available	Indicates if content is available for recommendation. This field only accepts two possible values, Y(yes) or N(no). If set to N then the content is not given as a recommendation. This field will be mapped from an Aprimo Option List metadata field that allows the user to select Available or Not Available. This value is required by Einstein and must be populated on the DAM record, or your file upload will fail.
StartDate	The date that the asset is eligible for recommendation. This field will be mapped from a DateTime metadata field in Aprimo. Einstein will only accept the date if it is formatted as YYYY-MM-DD. This value is required by Einstein and must be populated on the DAM record, or your file upload will fail.
EndDate	The date that the asset is no longer eligible for recommendation. This field will be mapped from a DateTime metadata field in Aprimo. Einstein will only accept the date if it is formatted as YYYY-MM-DD. This value is required by Einstein and must be populated on the DAM record, or your file upload will fail.
Fallback	Indicates if Einstein should use this asset as a fallback if an asset can't be selected by usual means. Y(yes) and N(no) are the only valid values. This field will be mapped from an Option list metadata field in Aprimo that contains 2 selectable values. 1 to set the asset to be used as fallback and the other to not use the asset as a fallback.

	This value is required by Einstein and must be populated on the DAM record, or your file upload will fail.
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Catalog Upload: The connector uploads the catalog file into an SFTP server. The user must go to the SFTP site, retrieve the catalog file, and manually upload the file into Einstein. The Catalog File will be uploaded to the SFTP server with the following name: AprimoCatalogFile-MMddyyyy.csv where MMddyyyy relates to the current date the file was created. E.G AprimoCatalogFile-05042020.csv.

Catalog Row Updates: If an asset has already been included in a Catalog File and that Catalog File was uploaded to Einstein and the asset is included in future Catalog Files, the previous version will be overwritten as long as the unique AssetName field is the same. E.g. If the Aprimo_123 AssetName is used in a Catalog File at one time with Availability set to 'Y' and then Aprimo_123 AssetName is used in a future Catalog File with Availability set to 'N', then the Aprimo_123 asset in Einstein will have its Availability set to 'N'.

4. Customer Setup

Note that Aprimo will simply generate and provide the catalog file on an SFTP site periodically. It is up to the customer or Salesforce implementing partner to determine all other aspects of implementation of Salesforce Einstein, including:

- What additional fields Einstein needs and to create those in the DAM accordingly.
- What asset classes are created.
- What the rules are for content showing on emails.
- Designing emails.
- Uploading the catalog file into Salesforce and triaging any errors.

Aprimo will simply enable the ability to generate the catalog file – all other activation steps for completing a full Salesforce Einstein Content Selector activation is not in scope. If additional support from Aprimo is needed, please let us know and we can provide more time from our experts to help configure the necessary fields in Aprimo.

Additionally:

- A Salesforce Marketing Cloud account with Einstein enabled will be required.
- The Aprimo Akamai connector is required and must be activated before this connector can be activated.
- An SFTP server for the Catalog File to be uploaded to.
- An Aprimo user will be needed with the necessary DAM permissions to read records through the REST API.
- A user for the SFTP site will be needed with the necessary permissions to upload files.
- Any fields that are required for Einstein must be populated, or file upload into Einstein will fail.

5. Additional Notes

- Crops are not supported.
- Only image formats are supported ("jpg", "jpeg", "png", "gif").