

OpenFlex Marketing nodes - documentation

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Overview

OpenFlex Marketing is a program to awaken automobile purchase intentions at the point of sale. It helps salesmen and dealerships to drive more sales.

One of OpenFlex Marketing submodule allows to create custom scenarios, like sending automatic emails based on specific triggers. We use Make.com to run these scheduled tasks. To help our user in this quest, we provide built-in nodes to retrieve customer segments and to send them custom emails.

To be able to use these nodes, the users are required to have an active account at maprochaineauto.com, in order to get an API Key, and to define customer segments.

The **OpenFlex Marketing** custom app comprises:

- 1 connection
- 4 modules:
 - a. Get Segment customers
 - b. Send individual email to customer
 - c. Send emails to entire segment

- d. Make an API call
- 2 RPCs:
 - a. Segment RPC
 - b. Signatory User RPC

Flow

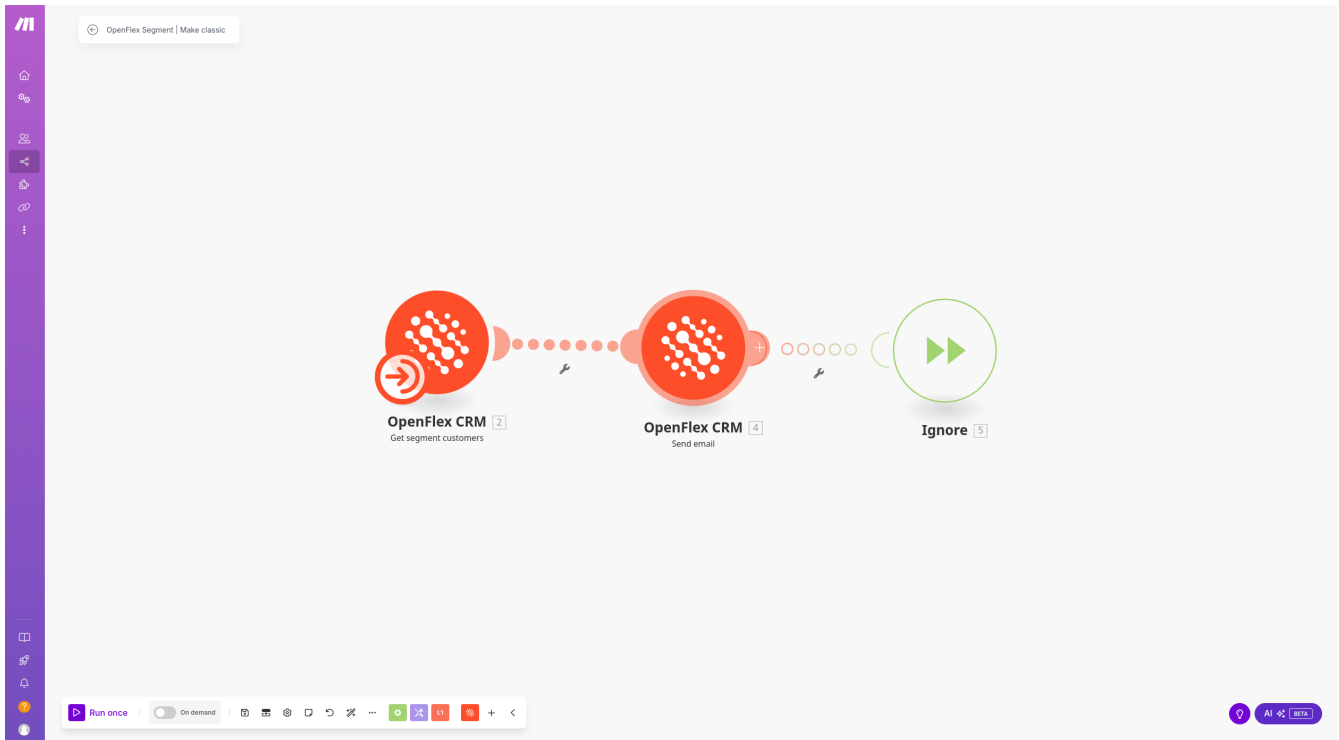


Figure 1. Overview of the OpenFlow Segment flow

The 2 modules **Get Segment customers** and **Send individual email to customer** are intended to work together, whereas **Send emails to entire segment** is intended to work as a standalone (more on that in their respective sections).

While the **Get segment customer** can be followed by anything, the **Send email** node has to be paired with the first module, because it expects a **customer_id** from OpenFlex Marketing database. Here is how it works:

Get customer segments node

1. the **connection** gets the **ApiKey** for the following endpoint calls - appending the **ApiKey** to the **X-API-KEY** header.
2. The **Get Segment customers** module uses the **Segment RPC** to fetch the list of segments bound to the related **workspace_id** (linked to the **ApiKey**)
3. Finally, the node passes the output (**i.e.** the list of customer from the selected segment) to the next node.

From there, the previous output can be passed to any other modules - GoogleSheet, Mailjet etc.

However, OpenFlex Marketing offers a dedicated flow for dealerships and salesmen to run email campaign. It comes with 2 nodes that allow to send pre-formatted emails to the customers: **OpenFlex Marketing | Send emails to entire segment** and **OpenFlex | Send individual email to customer**. More detail below.

Make an API call

This node is a generic node (call UNIVERSAL by Make), that allows to call any of the available endpoints, in case some node are not working as expected. The other nodes should be used preferably.

Modules in details

OpenFlex offers 2 distinct flows:

1. One node to send individual email to each customer of the segment: **Send Individual email to customer**
2. Onne node which runs once, and send a batch email to all customers of a given segment: **Send emails to entire segment**

The 2 nodes **Send Individual email to customer** and **Send emails to entire segment** work pretty much the same way. The difference will be stressed down below into the **Send emails to entire segment** section.

Connection

All the nodes will require an active account, and thus a working **Connection** to connect to OpenFlex.

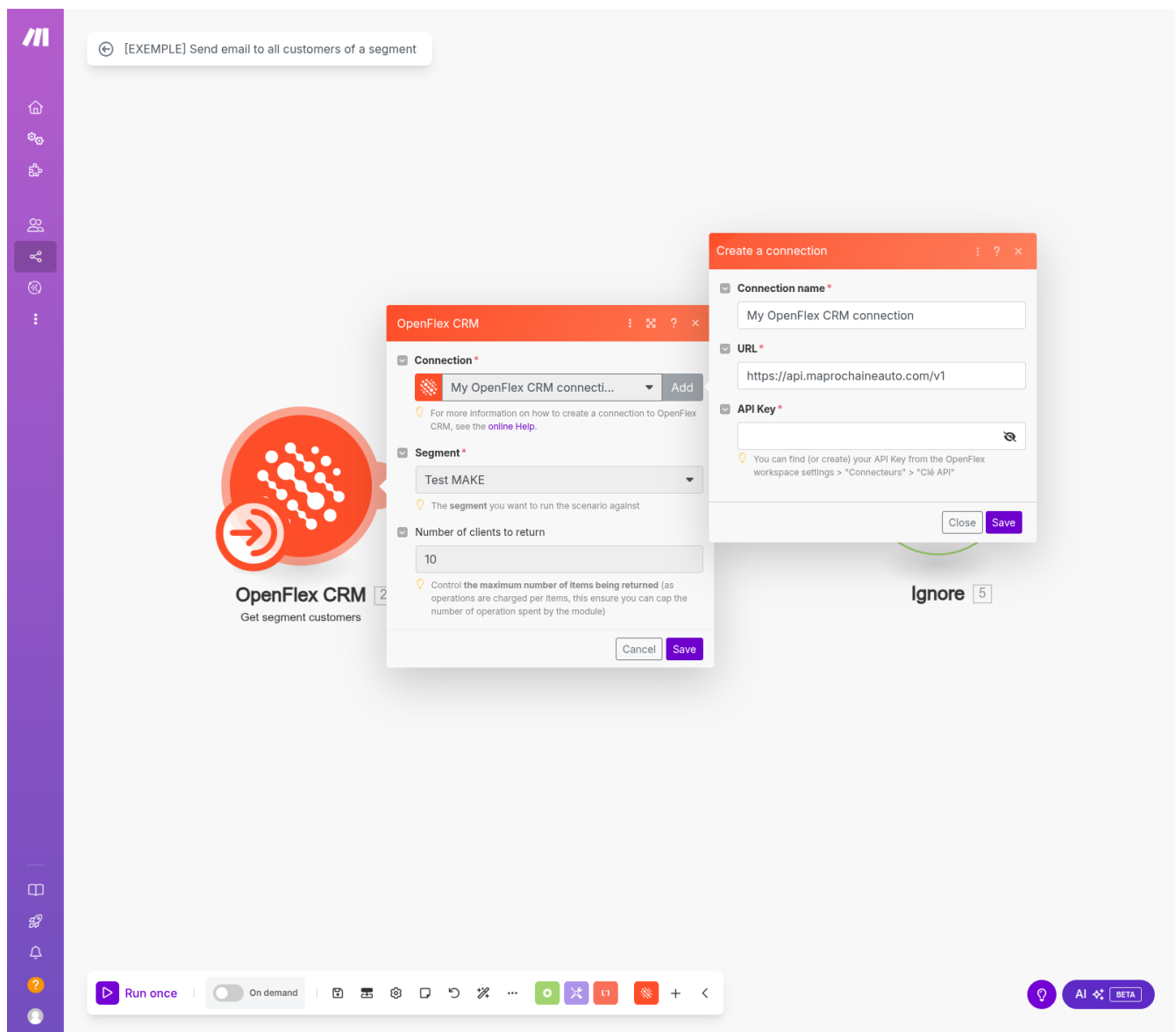


Figure 2. Connection node

3 fields are required:

1. **Name of the connection** (only used on Make.com side), to help you retrieve your connection among different accounts (if any).
2. **URL**: The base URL for the other endpoint calls. The default one (the production environment) should be the one to go. Depending on the scenario, you might need to change it. The Base URL is available in your OpenFlex workspace settings (along the API Key).
3. **API Key**: it's the key found in your workspace settings, in the OpenFlex webapp.

Get customer segments

Fields :

1. **Connection** (required): the **ApiKey** is required. The response contains the **workspace_id** which is used later on. The connection also save the **ApiKey**, which is also used downstream for authentication.
2. **Segment** (required): The module calls the RPC to get the related segments. It shows them into a dropdown menu.
3. **Limit** This fields allow you to cap how many requests are sent, to prevent unexpectedly high billing. 10 is the default, recommended by Make; You can increase to higher values to prevent some customer to not receive the campaign email.

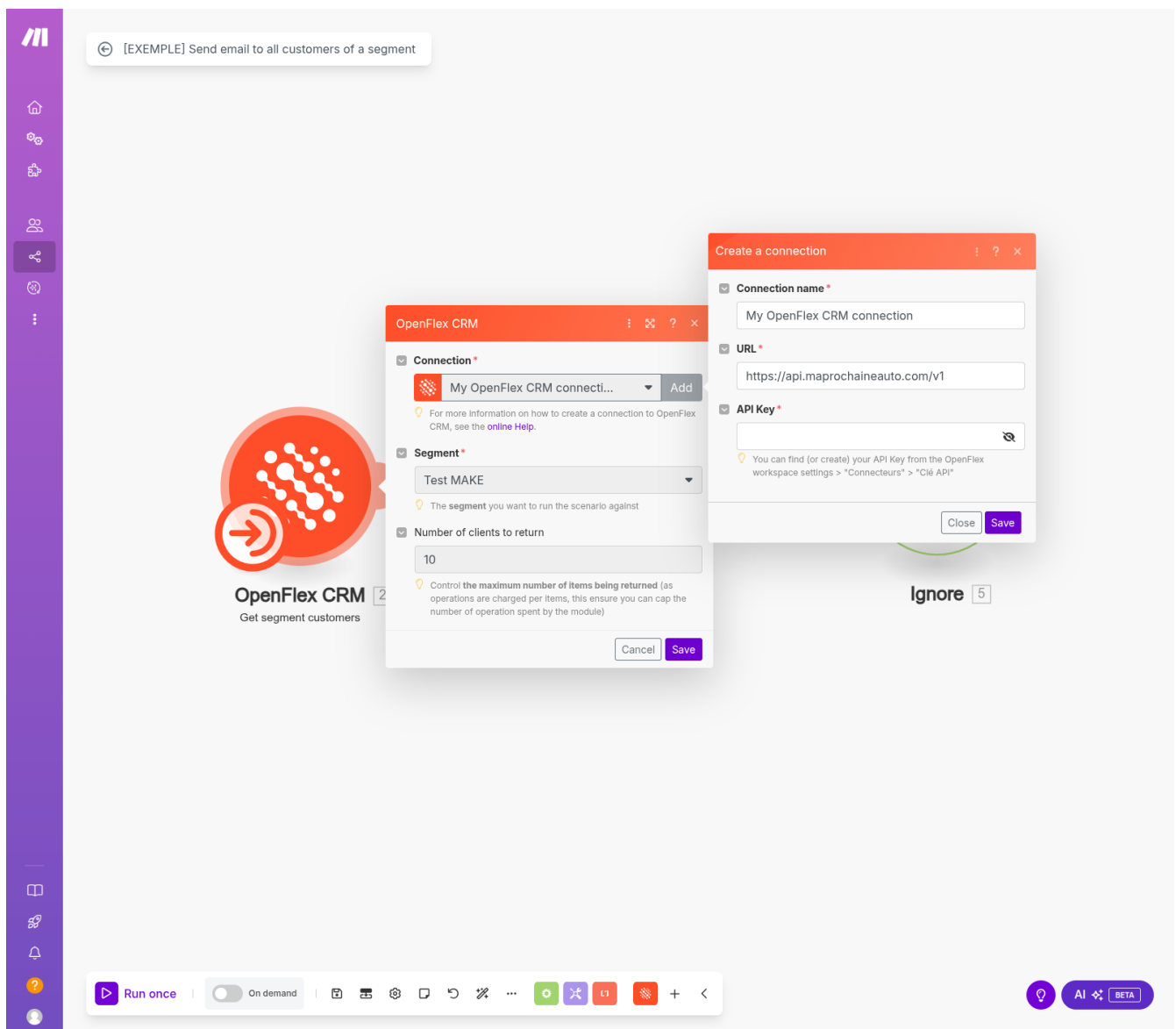


Figure 3. Get Segment node, with its 3 required fields

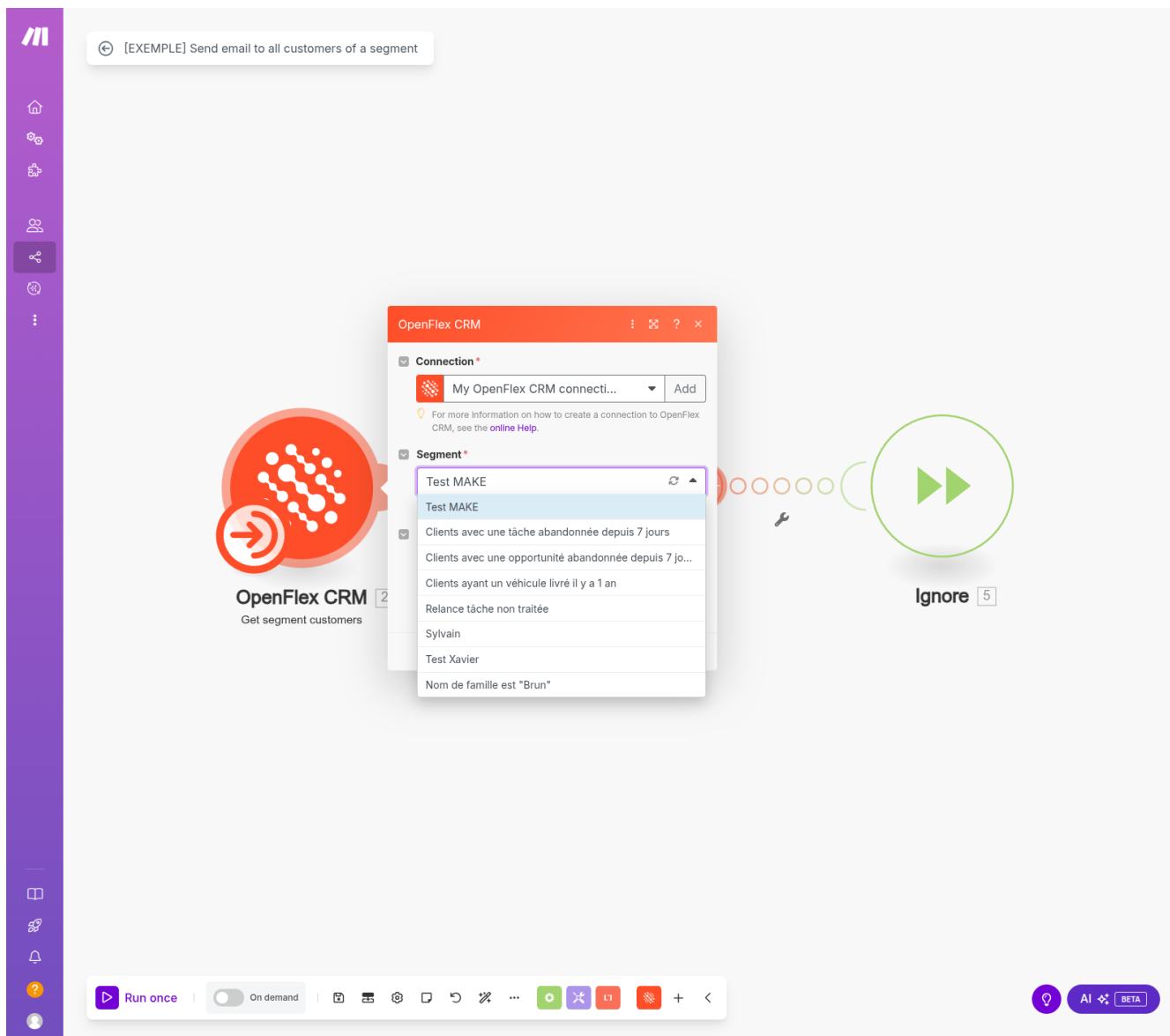


Figure 4. Fetching the segments related for a given workspace

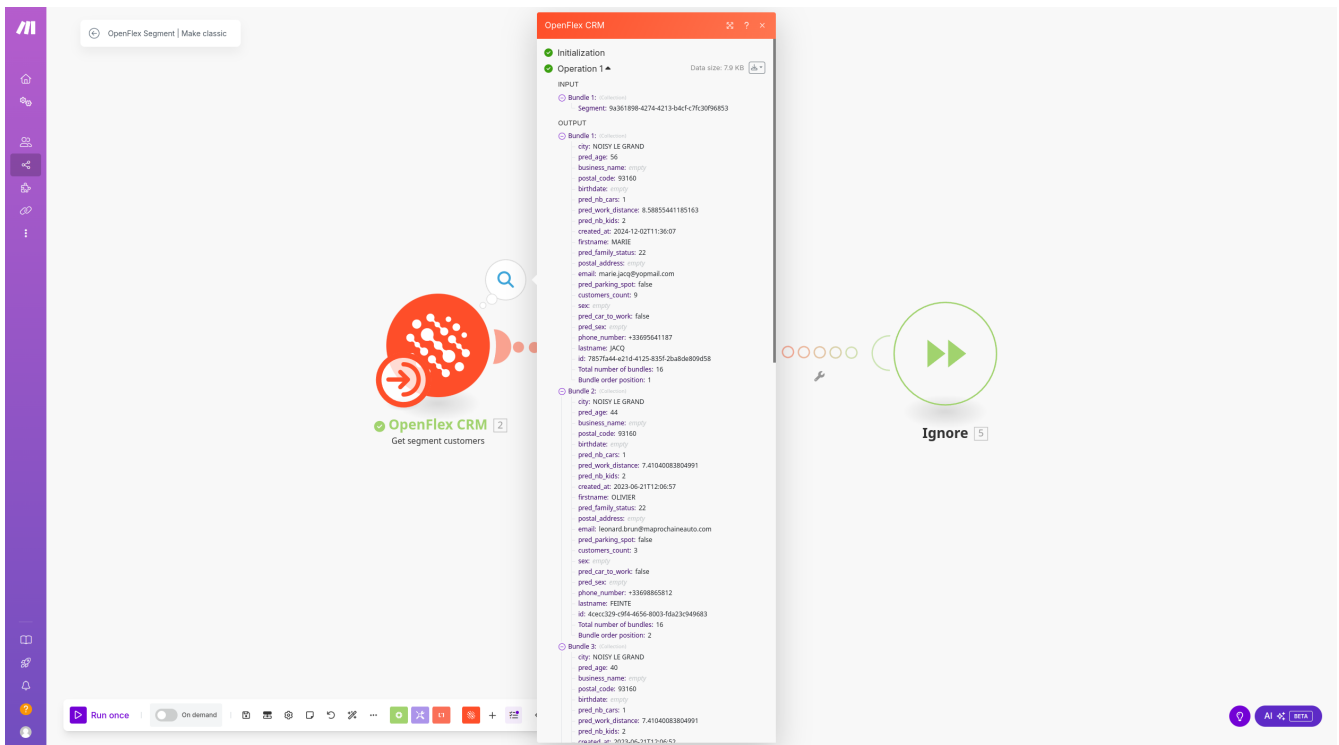


Figure 5. Output of the 'Get Segment Node'

Send Individual email to customer

Once you've selected your segment, this node allows to send email to each of its customers. It's very similar to **Send emails to entire segment**, but run once per customer. This node can be useful if you need to need to run additional checks or logic for each individual customer.

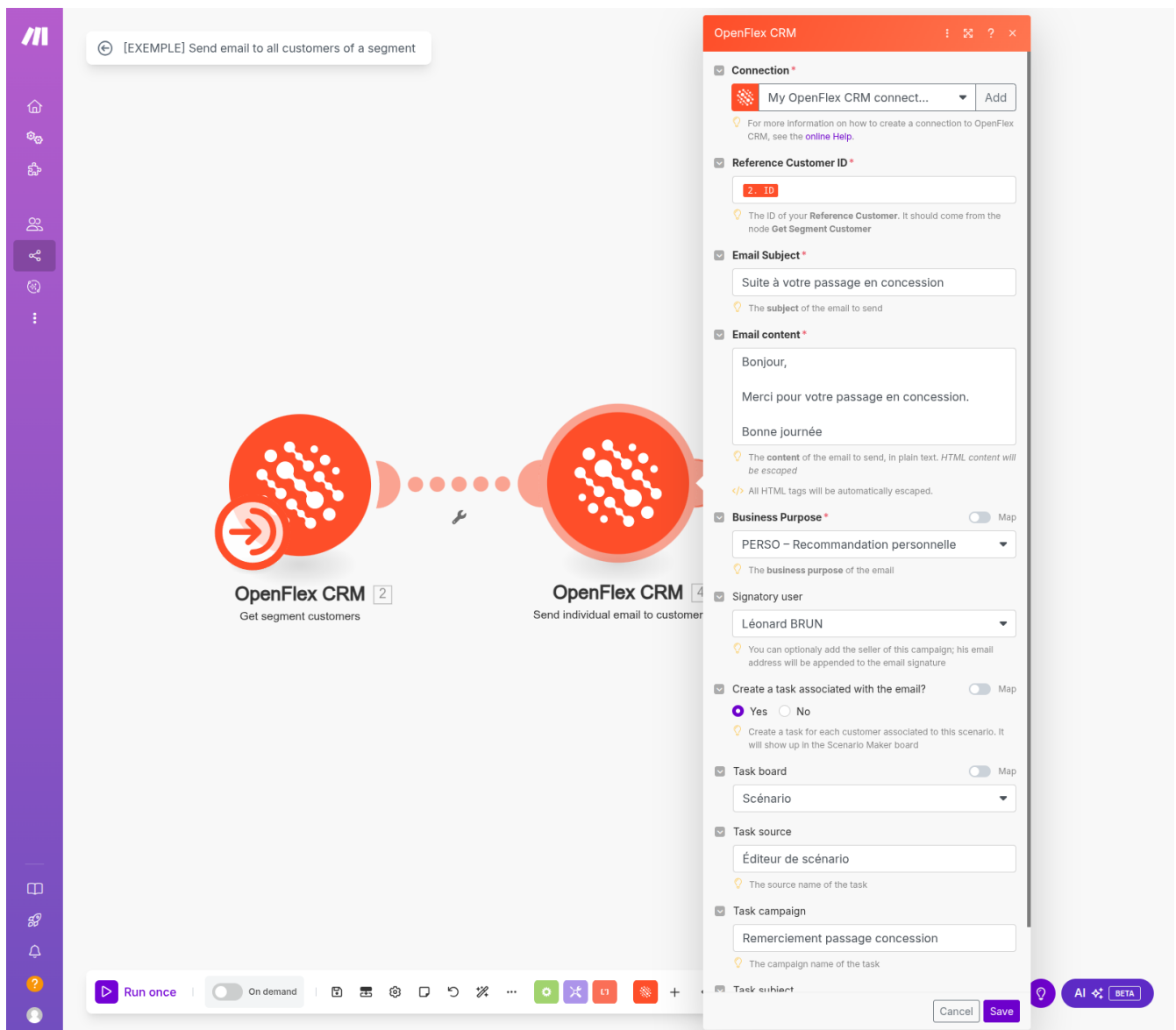


Figure 6. 'Send Individual email to customer' node

In order to work properly, **this node needs to be plugged to Get Segment Customer.**

Fields :

1. **Connection** (required): reuse the connection from the previous node
2. **Reference Customer ID** (required): The output from the **Get customer segment** contains an ID, which is used for this field. This field is hidden in Make Bridge templates.
3. **Email subject** (required): The subject of the email to send to the customer. The field is mappable, and can use variables from the **Get customer segment** output
4. **Email content** (required): The content of the email. For now, the HTML tags are escaped. And the field is also mappable.
5. **Business purpose** (required): For RGPD matter, the **business purpose** field is required, to precise what kind of communication this email is about.
6. **Signatory User Id** (optional): this field is optional: it allows to sign the email sent to the customer with one of the dealership's salesman signature.
7. **task** You can create and assign a task for each email sent. If you opt in, there are few additional

fields to fill in for where you want these tasks to appear.

Business purpose

Since OpenFlex operates in Europe, email campaigns require to comply to GDPR. The this matter, the field "Business purpose" explicits the purpose of your campaigns. If your customer unsubscribed from marketing related emails, it might not receive your email based on this criteria.

Because of that, an **Ignore** node is required downstream to prevent the flow to block because of unconsented customers.

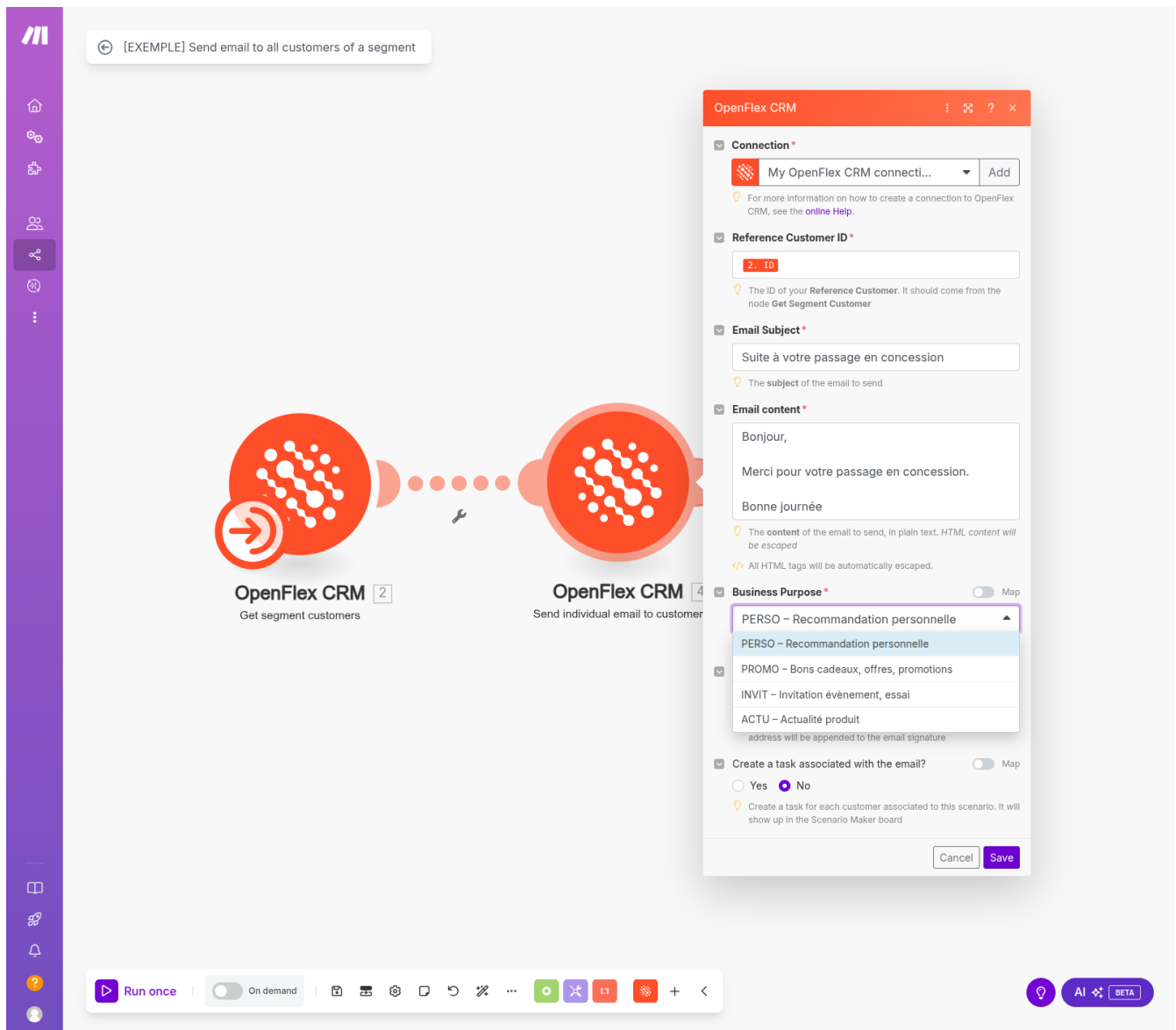


Figure 7. Business purpose

Signatory email

You can choose to sign the email campaign by one of your salesmen, using the Signatory fields. This fields will fetch the list of registered salesmen within your organisation.

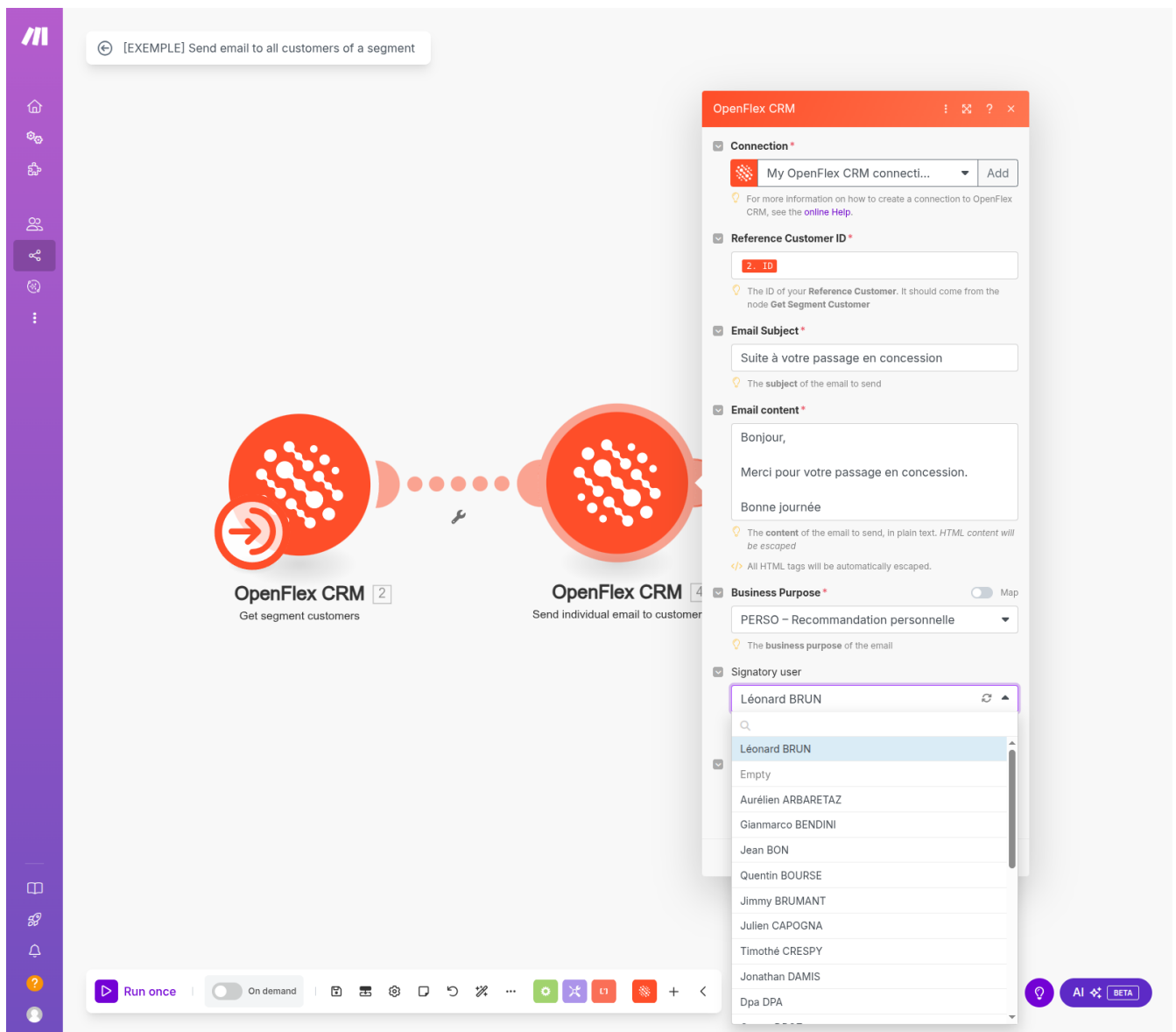


Figure 8. Signatory user

Task

For each email sent, you can opt to create an associated task. In this case, tick the "Create a task associate with this email?" checkbox, and fill in the 3 sub-fields.

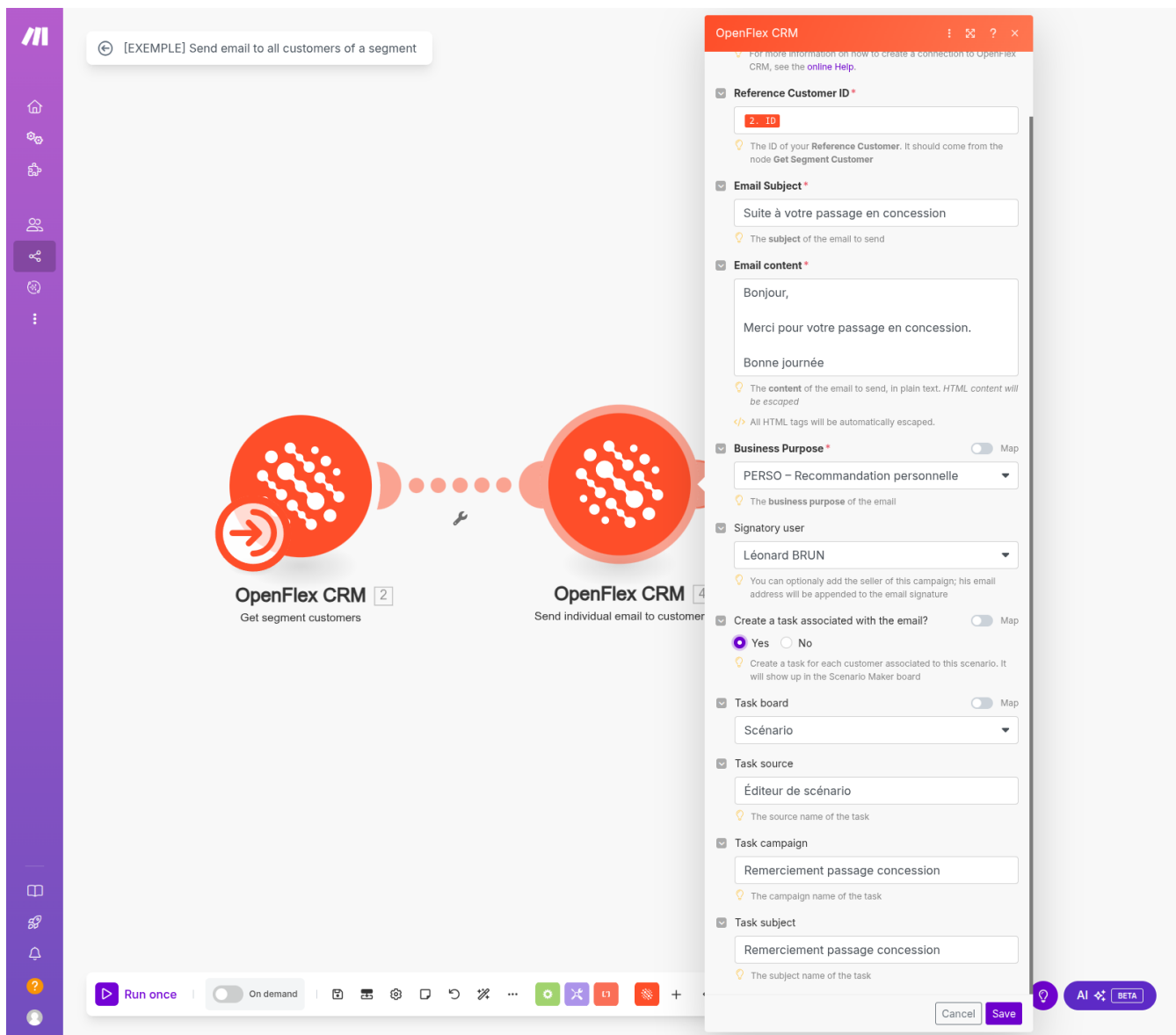


Figure 9. Create a task associated to each email

Flow control > Ignore

This node is required to prevent the flow to block (check [Business purpose](#) section). We will improve this behavior later on, to allow the flow running without this node. And we'll also further more improve the flow to be able to catch and save the flow report.

Send emails to entire segment

This node works as a standalone, and doesn't require any additional nodes to work (on OpenFlex end at least). You can always plug other nodes for further actions indeed.

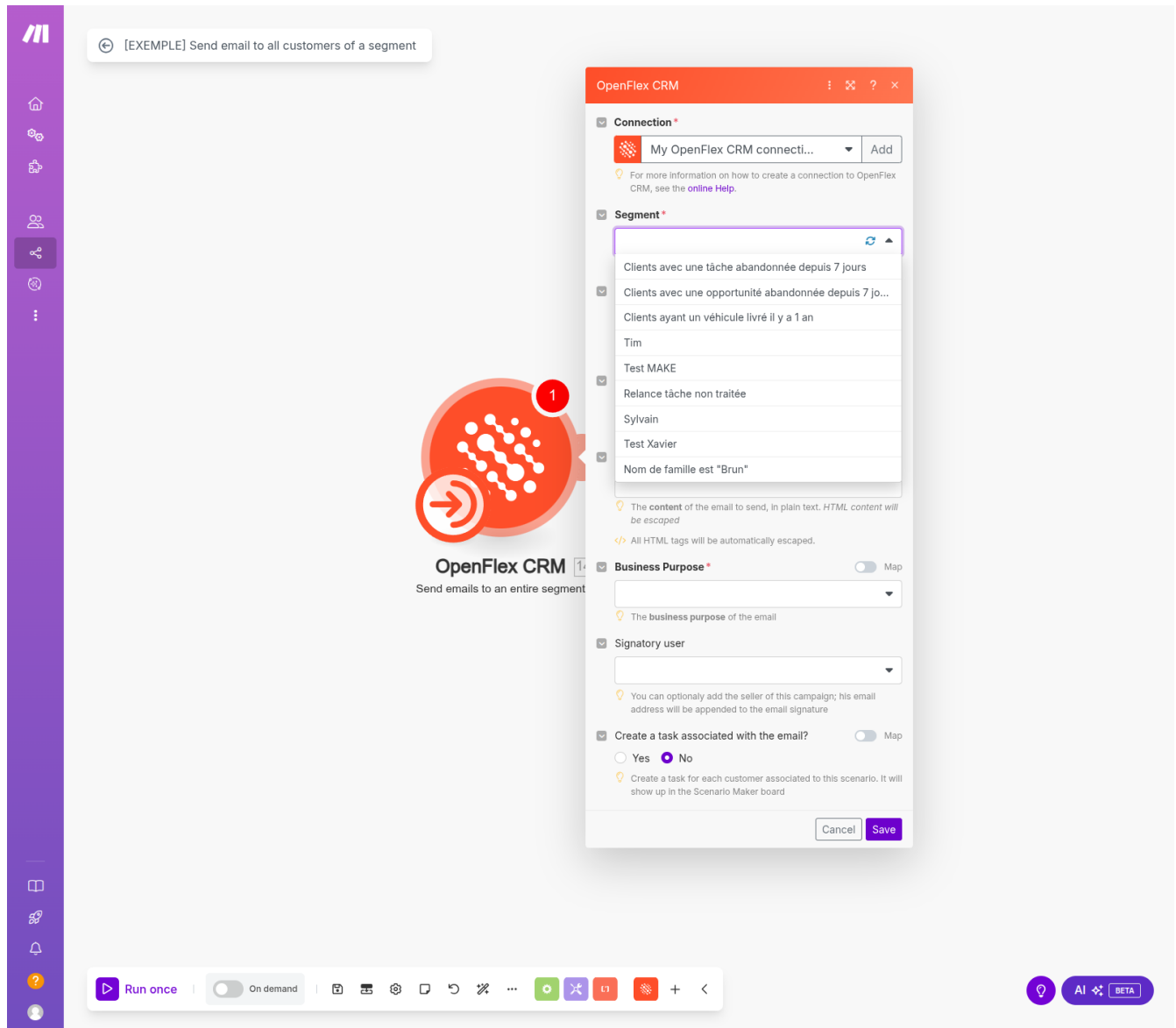


Figure 10. 'Send emails to entire segment' node

There are 2 main differences with the "Send Individual email to customer" node:

1. It acts as a standalone node: no need to plug it to anything else; it will work out-of-the-box
2. Instead of filling in the **Reference customer ID**, only the segment here is required. So you will find the same dropdown menu that fetches the segments as in "Get Customer Segment" node.

One important consequence of this flow: in this node, no matter how many customers the segment comprises, the node will run once. **It was designed to reduce the number of operations for long segments.**