Apteco

Technical Guide

Helping you to get the most out of the Apteco Marketing Suite™

Salesforce Integration Guide DE
D058T3X002 - February 2020

February 2020

Revision Tracking Sheet

This manual may be revised periodically to incorporate new or updated information.

Note:

Every effort has been made to keep the information up to date there may be changes to the broadcaster's API if in doubt contact your support department.

Listed below is the revision date of each page (if applicable):

PageRevision

All pages updated April 2019

API Version, Authentication Base URI, Base URI options Page 26, 43

Contents

1 Introduction

This integration guide details the processes required to integrate the Apteco Marketing Suite with the Salesforce Marketing Cloud email service provider (ESP).

Integration options:

FastStats

For a one-off broadcast, you can use a combination of the Email Broadcasting and Email Responses wizards to upload your list, schedule a broadcast campaign, and finally receive responses from your customers back into your FastStats system for further analysis.

PeopleStage

Automate data uploads for unattended and scheduled marketing broadcasts, PeopleStage will allow you to define and implement marketing process flow diagrams that will react to the responses you receive from the ESP.

Export and Upload a File

Access generic FTP support to allow data export and upload to third-party digital broadcast providers.

Note:
Apteco approves this integration with Salesforce. Use of the Apteco Marketing Suite in combination with Salesforce software through this integration will not affect the intellectual property rights indemnity provided in the Apteco Marketing Suite "End User Licence Agreement".

1.1 Summary of Salesforce functionality

Technology

Salesforce integrates with your FastStats system by utilising both SOAP and RESTful transport over HTTP/S, in conjunction with SFTP. RESTful is utilized when using *Content Builder

Supported Integrations

Salesforce supports all the above integration options.

Type of Integration – User Defined

Salesforce is a User Defined integration meaning you can select variables at run time and create a personalised output based on specific requirements.

*Salesforce Classic Builder allows HTML and Text only Emails, the Content Builder allows you to create Message Templates.

Note:
The Salesforce Marketing Cloud is a highly configurable integration, you may need to contact your Partner or Apteco for help with customising this integration.

This document covers Data Extensions and assumes you are using the Content Builder in Salesforce.

1.2 Before You Begin

CAUTION

This guide assumes you have the relevant Apteco Marketing Suite system administration experience to perform this task, particularly with the FastStats Administrator, SQL Server and the areas of the Apteco Marketing Suite that relate to creating selections and campaign creation. If you do not, contact your Apteco partner or the Apteco support team. You need to have the appropriate system and SQL Server administrator permissions to install the relevant components successfully. Additionally, you will need to have Access to the broadcaster web-based control panel and obtain all the relevant information from Salesforce. You will also need to understand how to construct your message in Salesforce.

This guide details the steps required to integrate FastStats and PeopleStage with a Broadcaster using an API; the document is in two parts:

1. The configuration of the Apteco Marketing Suite
2. Appendices which include:
    a. A summary of configuration in Salesforce
    b. API Parameters

Note:

You need to configure Salesforce before you perform the steps in Chapter 4

Useful to have before you start:
You need to know the Salesforce message requirements to match the fields that you upload from FastStats or PeopleStage

Table 1 – Prerequisite Checklist

Apteco FastStats System or Apteco	Description
Database Connection String	Made up of the database server Instance name and FastStats system name
Example <SQLServerInstanceName>;Initial Catalog=RS_<SystemName>;User Id=<system_username>;Password=<system_password>;	
The **Digital Integration.zip** available from:	https://www.apteco.com/portal/software-releases
Decide where you want the **FastStats Email Response Gatherer (FERG)** to be installed	This will typically be on the same PC as the FERG folders but can be on any PC
Decide where your **FERG folders** are to be created, used to store the .xml and .bat files used when scheduling FERG.	The location to store the results to optimize the processing of campaigns that generate large volumes of data, the Bulk Insert folder must be accessible from SQL Server to use BULK INSERT

See Appendix A: for instructions on how to obtain the following from your Salesforce Marketing Cloud. You may need to obtain some information from Salesforce.

Salesforce Marketing Cloud	[*] Example, this will be specific to your account
The Salesforce **Username** and **Password** and **Account ID** for the Salesforce Marketing Cloud	Available from Salesforce
The Salesforce **File Transfer Location**	Recommended “ExactTarget Enhanced FTP”
The Salesforce API **Username** and **Password**	Available from Salesforce
The **FTP URL** e.g. “ftp1.exacttarget.com”	The FTP endpoint can vary between accounts see: https://developer.salesforce.com/docs/atlas.en-us.noversion.mc-apis.meta/mc-apis/wsdl-endpoint-links.htm
API Version	All new accounts with Salesforce will be on v2, you can check if your existing API Package is a Legacy API v1 from Setup – Apps > Installed Packages
Authentication Base URI	[*]https:// 0f4wbzr4nlfssl wi2u612psbpg7g.rest.marketingcloudapis.com/
Base URI	[*]https://0f4wbzr4nlfssl wi2u612psbpg7g.rest.marketingcloudapis.com/
The **API URL** in the format -	e.g. https://webservice.exacttarget.com/Service.asmx Check with Salesforce
Assign Roles to Sender	See
The *Sender Profile Code/s to associate with a broadcast in FastStats or PeopleStage ().	Mouse over the Sender Profile Initials to see the globally unique identifier (GUID) at the bottom of the window, change to uppercase *24C54B21-3708-F123-A4E8-973AF123381B
***Client ID** and ***Client Secret**	*g2yTgel9ighz118ps6cWnq3j
The Salesforce **Message Name**	**Note:** You should also know the content requirements of the message, for example, create a test message using “Firstname” and match the broadcast field in FastStats
The Salesforce **Send Classification**	e.g. Default Commercial
Whether you are using the **Content Builder** or **Classic Builder** in the Salesforce Marketing Cloud	You must move to Content Builder if you are using the Classic Builder
The message **Upload Folder** under the Data Extensions tree and the **Upload Only Folder** to organize your broadcasts	These can be absolute paths to the folder, or you can use the following parameters e.g. Root\%LISTNAME%\%MESSAGENAME%

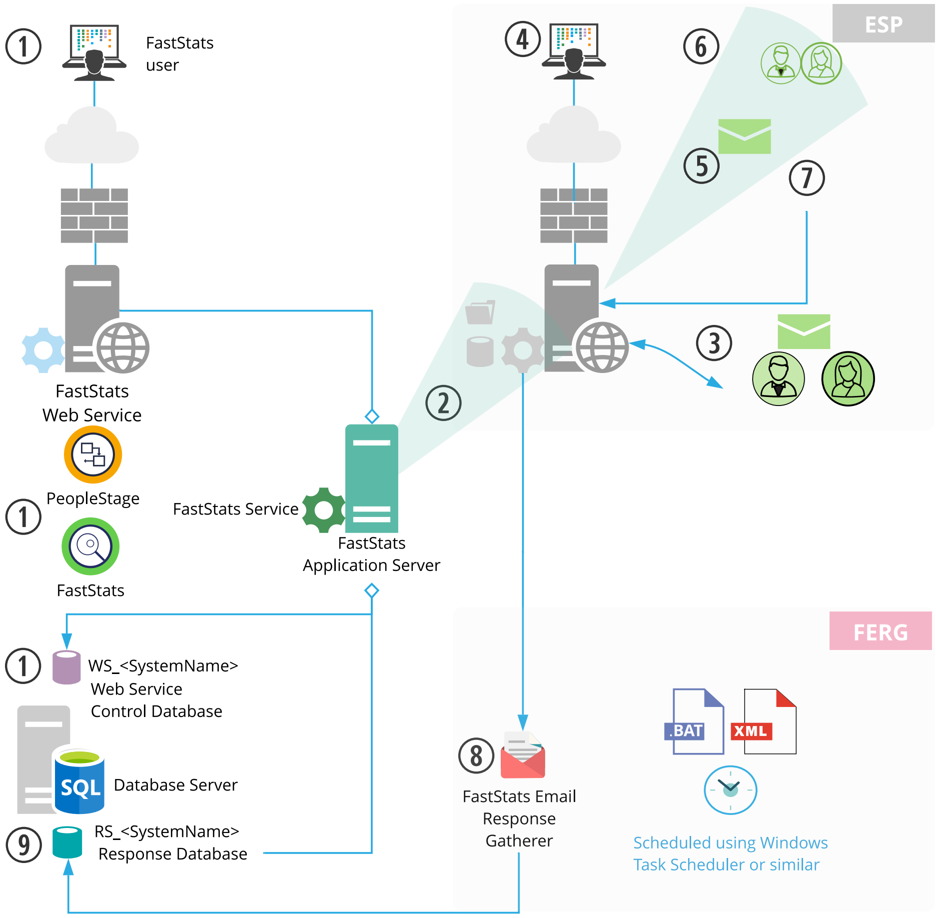
***Example** -You can create individual sender profiles within Salesforce to associate with a broadcast, you create an API Package for each Profile, the codes are specific to that Profile

2 Process Summary

2.1 Architecture

The following diagrams describe a typical process from FastStats to Salesforce, to the customer and back to FastStats.

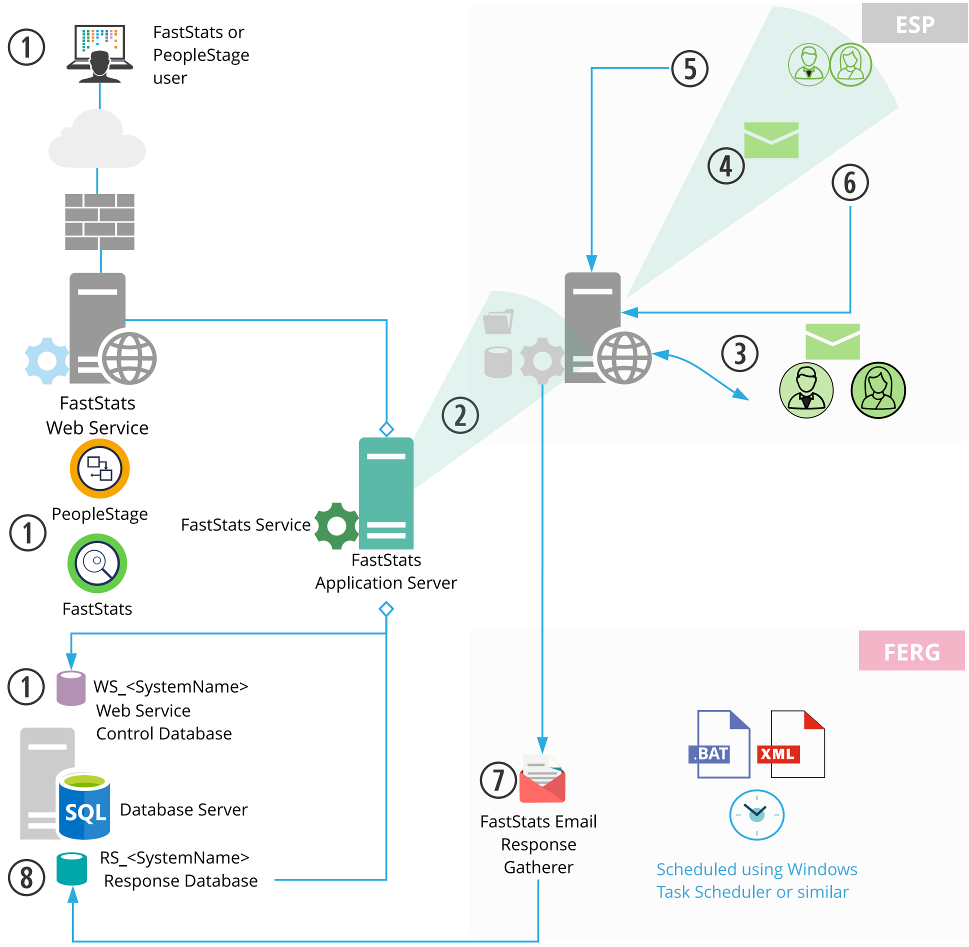
Schematic showing campaign scheduling performed in Salesforce.



1. A broadcast is initialised through the FastStats Web Service using the Email Broadcasting Wizard, which inserts a job into the Web Service Control database (WS_DB).
2. The FastStats Service picks this job up, uploads the list to the Salesforce SFTP site and then uses SOAP communication to monitor the upload. RESTful communications over https is used when you use the Content Builder
3. Salesforce then imports the contents of this list to its subscribers and associates them with a list name ready for use in any email campaigns.
4. A campaign can then be scheduled using the Salesforce web interface.
5. Salesforce sends Messages to all recipients on the list.
6. Salesforce records any undelivered messages.

7. Salesforce records a response for each interaction with a message (for example opens and clicks).
8. A scheduled job on the FastStats server initiates the FastStats Email Response Gatherer (FERG) which checks the SFTP site for response files.
9. These responses are then imported into the Response database (RS_DB) ready for analysis by your FastStats system.

Schematic showing scheduling performed in FastStats or PeopleStage.



The key difference in this process is messages are sent from Salesforce automatically, allowing full control of the campaign scheduling from within the Apteco Marketing Suite.

Note:
For the message to send automatically, you need to create a Message in Salesforce.

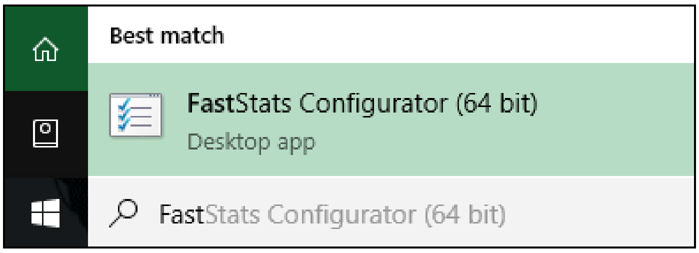
3 Apteco System Configuration

3.1 Creating the Response Database

You will need to create a response database to receive your responses from the ESP.

1. Open the FastStats Configurator.

Tip:
Search for Fast in the Start Menu



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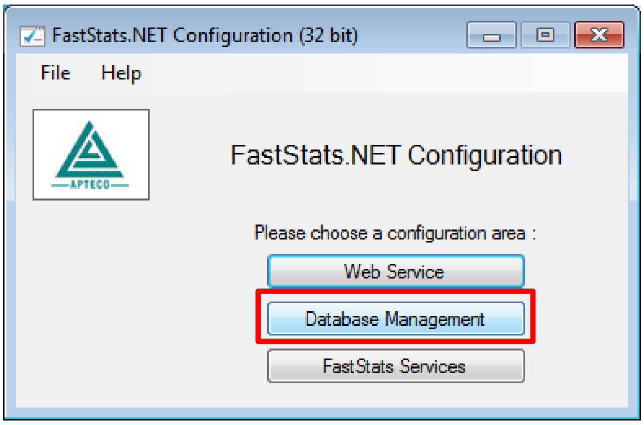
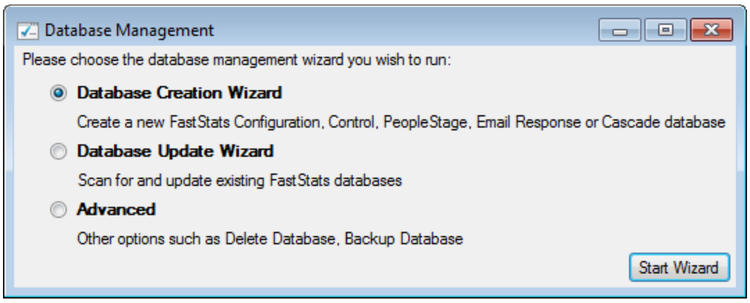
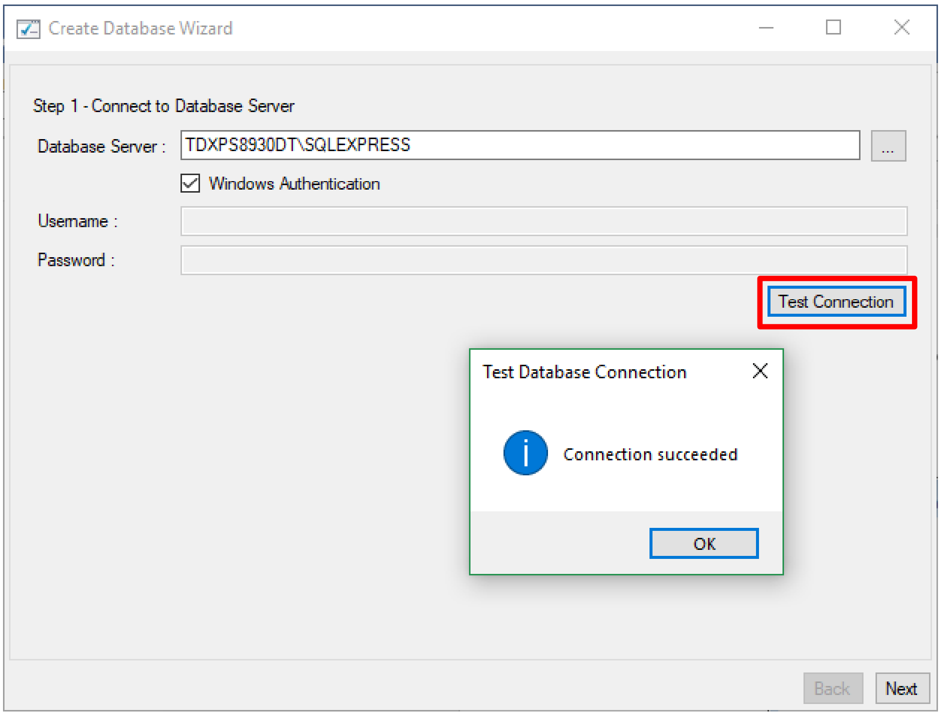
2. Select **Database Management**.



3. Select the **Database Creation Wizard** option and click **Start Wizard**.

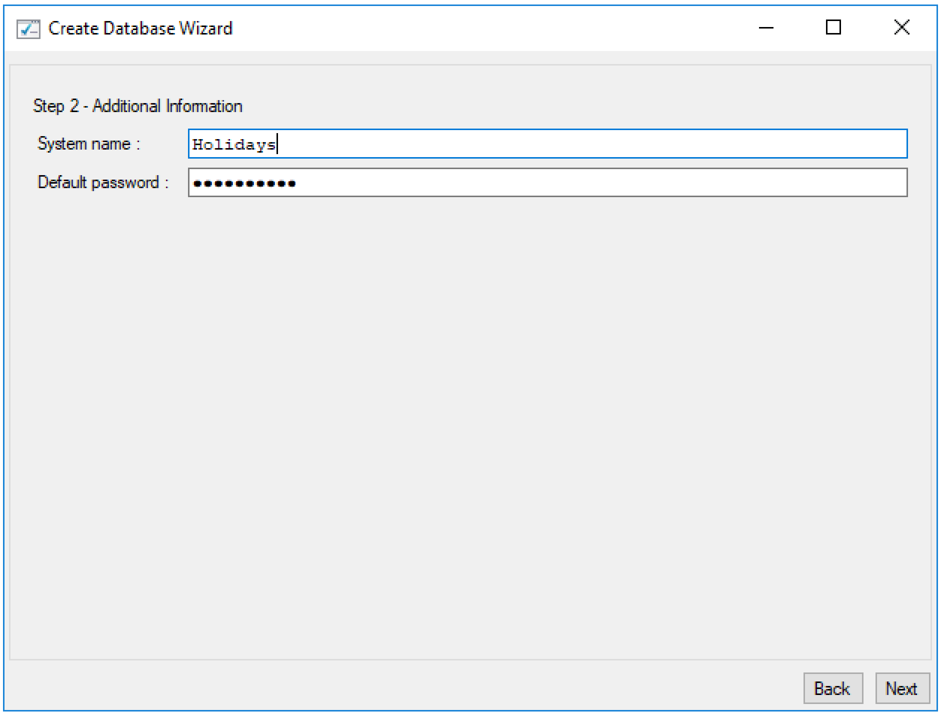


4. Enter the name of the **Database Server** where you wish to store the response database, click **Test Connection**

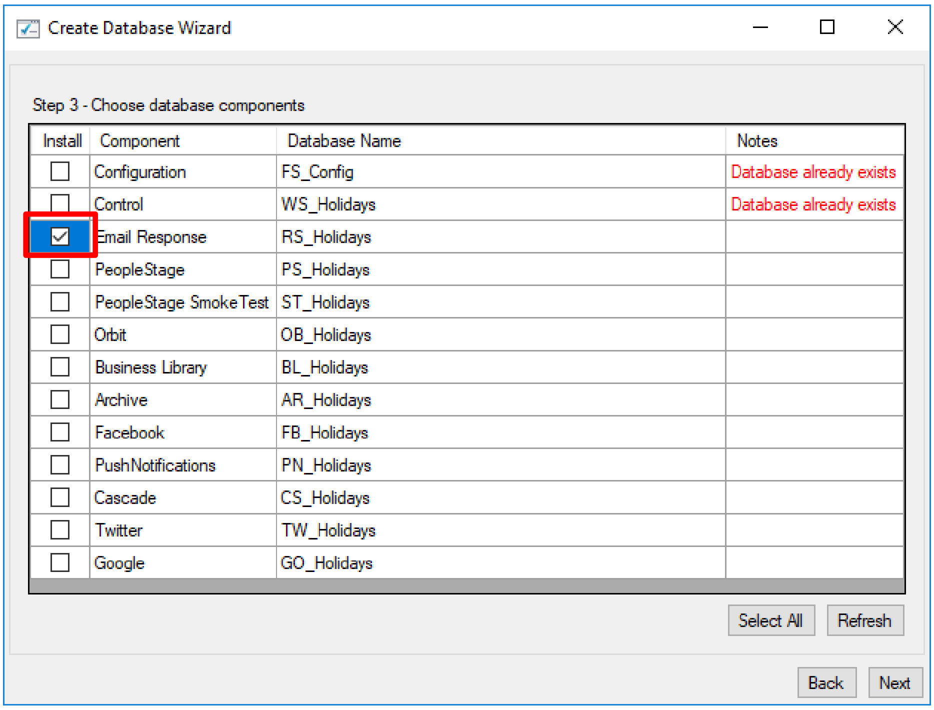


Note:
The Database Server name can be found by launching SSMS and finding the SQL Instance for your FastStats system, for example TDWIN10B\SQLExpress.

5. Enter a System name (for example Holidays) and your secure password.



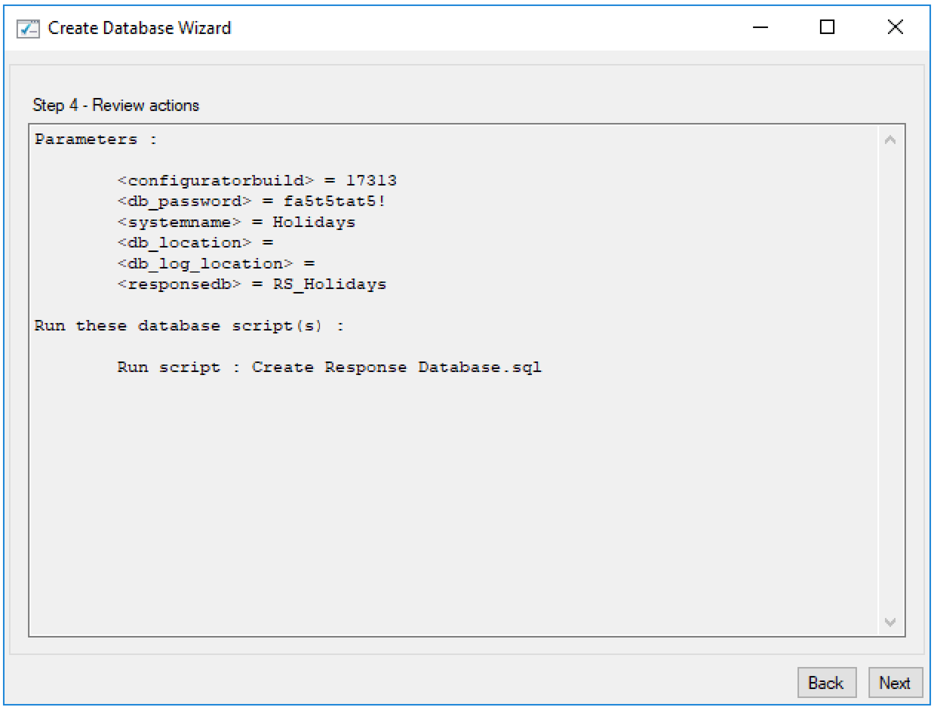
6. Select the **Email Response** check box, then click **Next**.



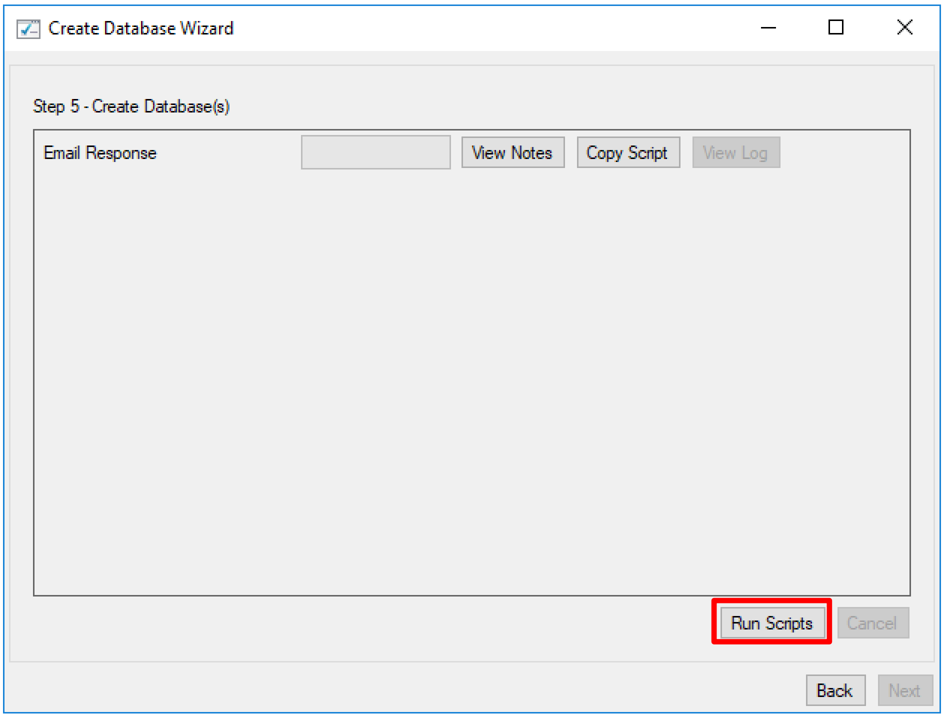
Note:

The Response Database may already exist, see the **Notes** column if it does you do not need to complete this process, click **X** to exit the installer.

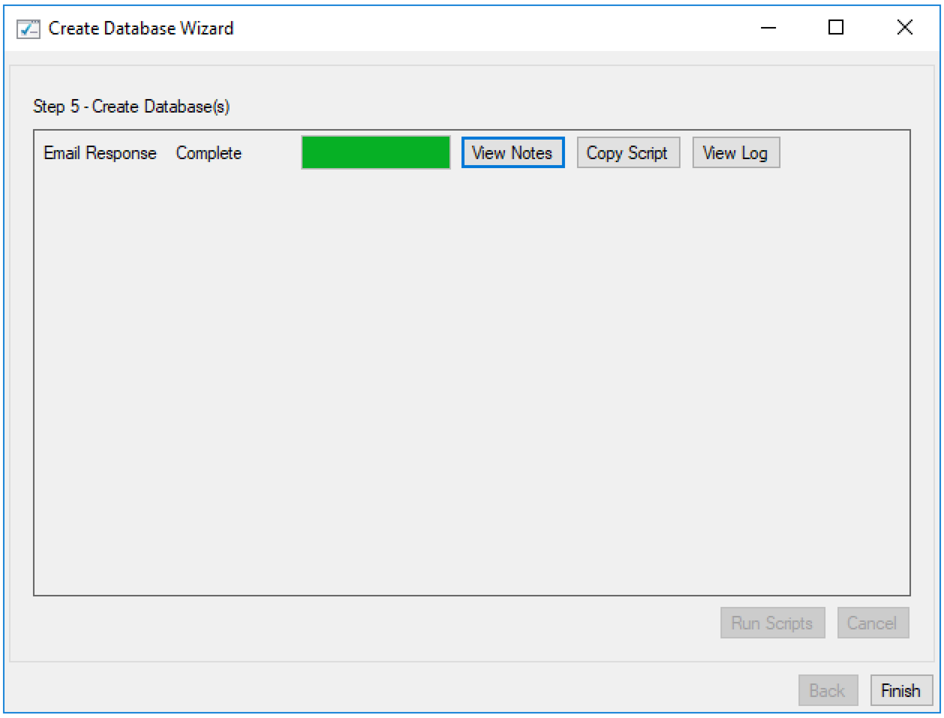
7. Click **Next** on the Review actions step.



8. Click **Run Scripts**.



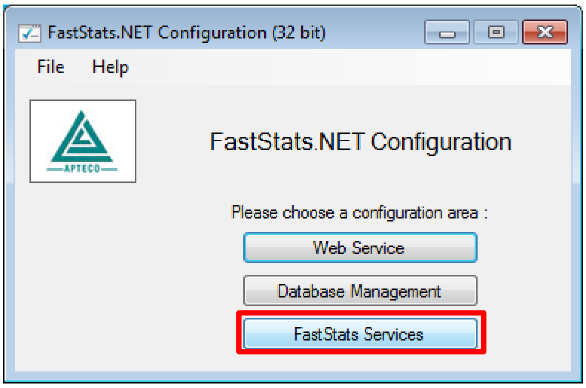
9. Click **Finish**.



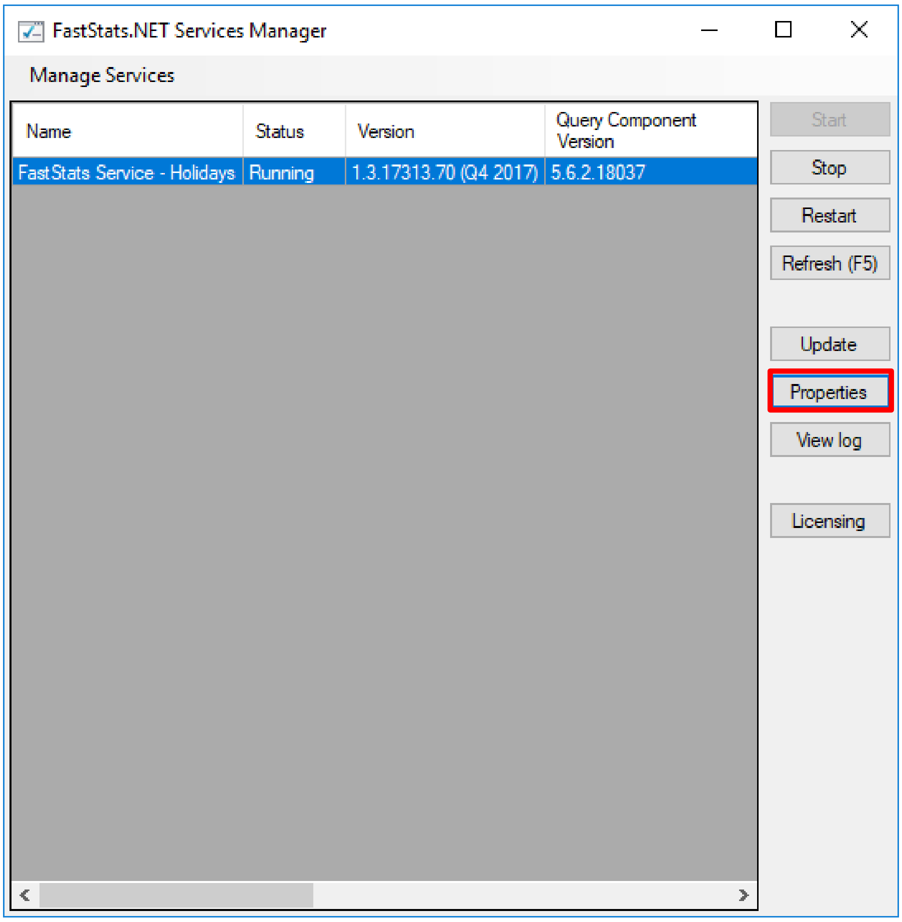
3.2 Linking the Response Database to the FastStats Service

You need link the response database to the FastStats service.

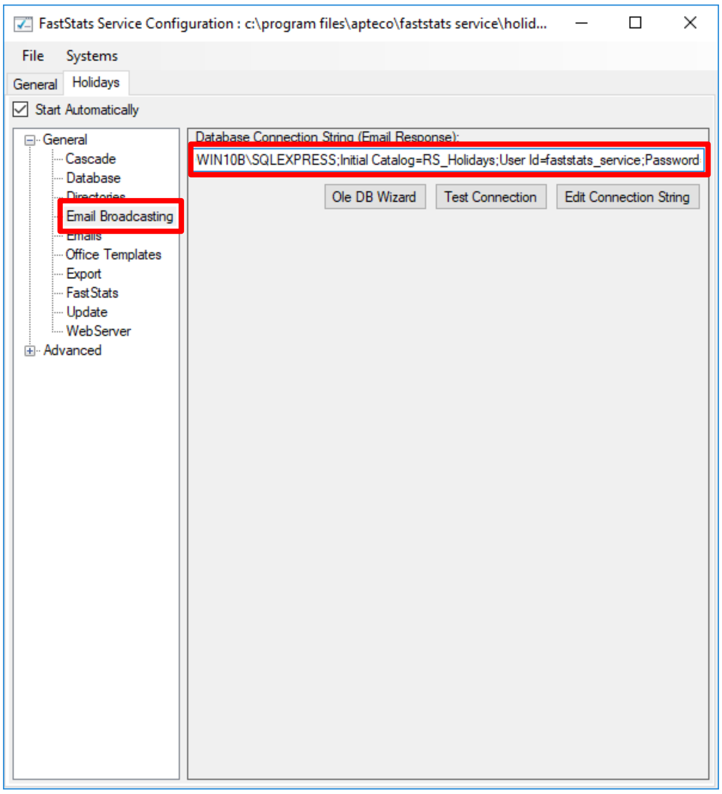
1. Open the **FastStats Configurator**
2. Select **FastStats Services**



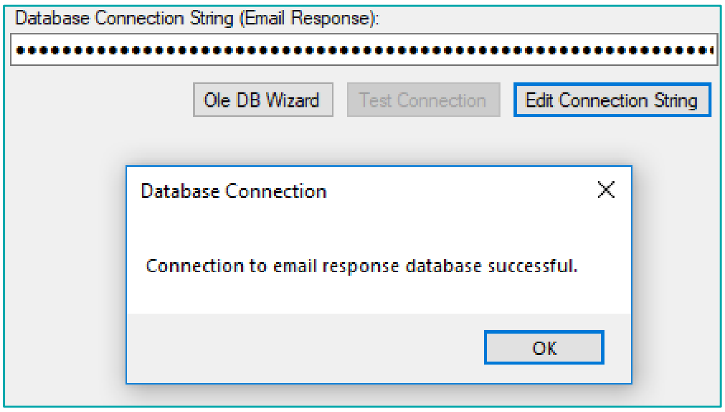
3. Select the **FastStats Service** for the system to link to the response database, click **Properties**



4. Select the system tab you want to link the response database, select **Email Broadcasting** from the list on the left and then enter the database connection string to your response database.



5. Click **Test Connection**, click **OK** to close the dialogue box



6. Select **Save** from the File menu

Note:
A restart of the FastStats service is required to pick up the changes to the configuration, click **Restart** in the **Managed Services** dialogue box.

General Considerations
For broadcasts to work correctly you need to ensure that the FastStats server has access to the relevant FTP site through port 443, Salesforce requires you to setup an FTP site.

3.3 Installing the Email Response Gatherer

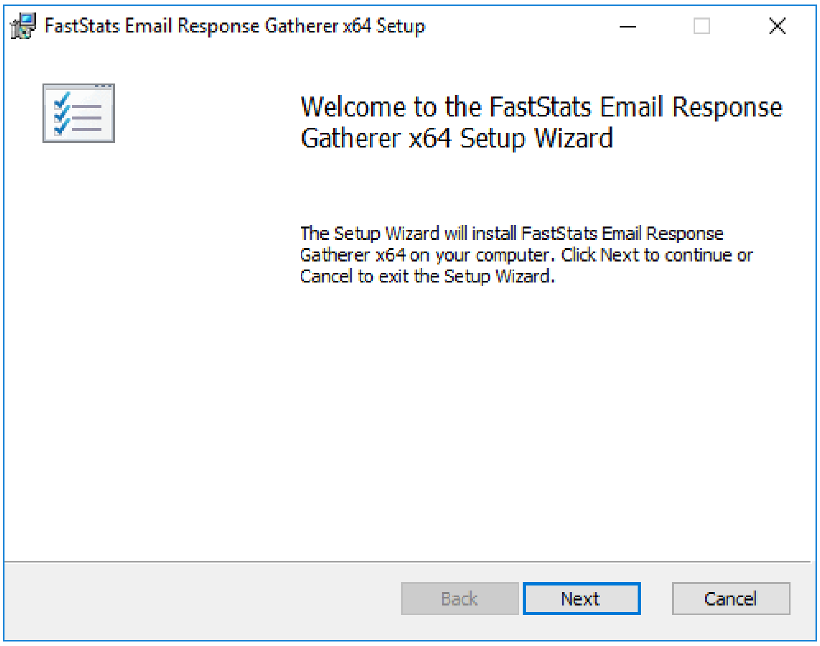
You can find the FastStats Email Response Gatherer installer in the DigitalIntegration.zip, extract the zip file to your designated PC where you want the email response web gatherer to run.

Digital Integration.zip available from:
https://www.apteco.com/portal/software-releases

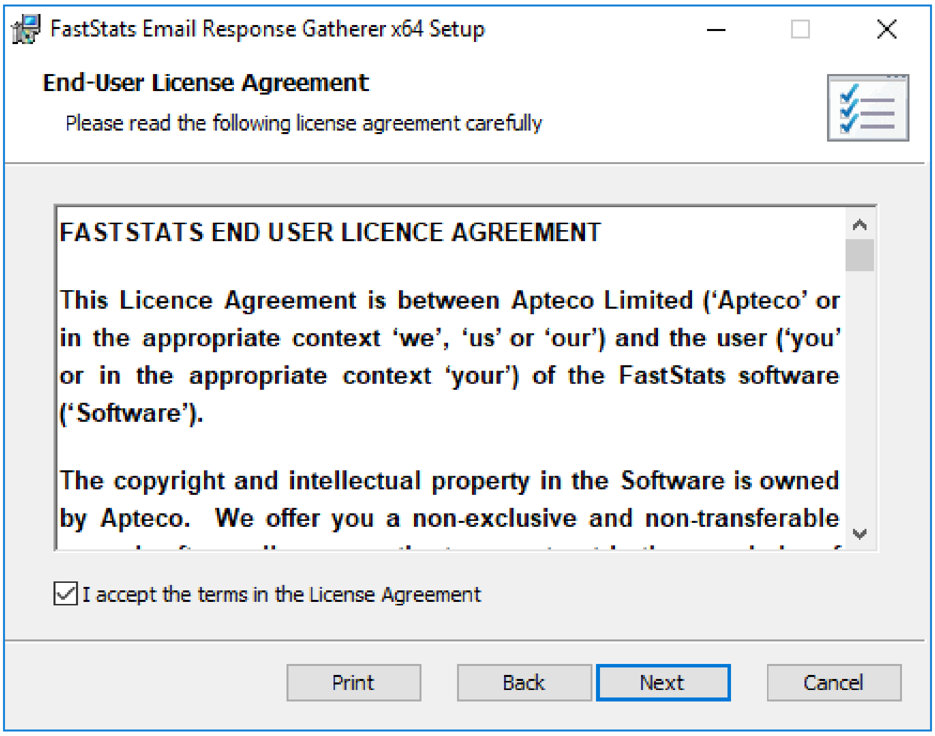
Note:
The FastStats Email Response Gatherer application can run on any PC in your system.

Open the **EmailResponseGatherer64Setup.msi** from the DigitalIntegration\ EmailResponseGatherer folder.

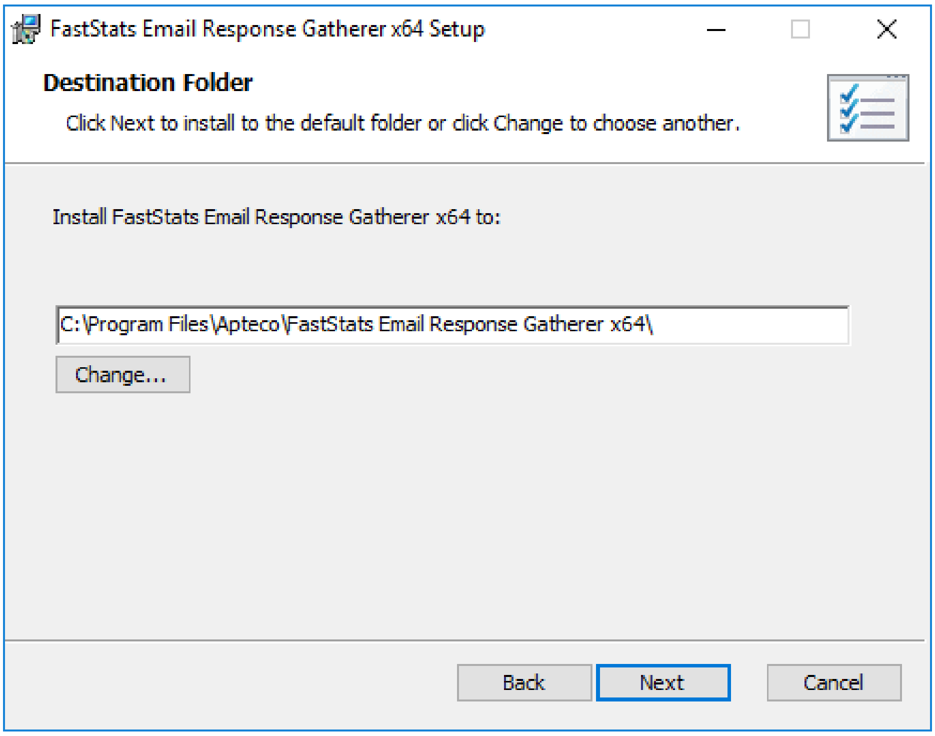
1. Click **Next**.



2. Select the check box to accept the terms and click **Next**

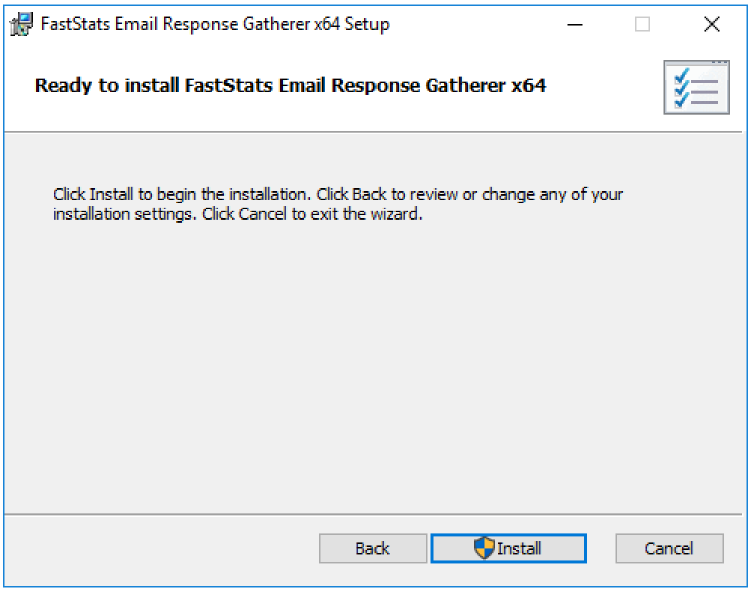


3. Click **Change** if you wish to install the Email Response Gatherer application in a different location then click **Next**

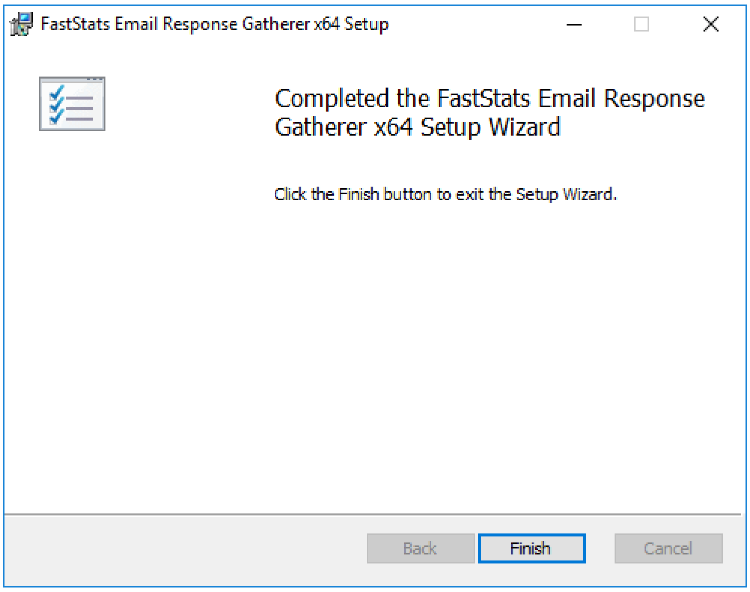


Note:
The default directory for this is **C:\Program Files\Apteco\FastStats Email Response Gatherer x64** but may be different, we recommended that you install this in your FastStats application files directory on the FastStats Application Server.

4. Click **Install** to start the installation



5. Once the installation has completed, click **Finish**



3.4 Creating the Response Gatherer Folders

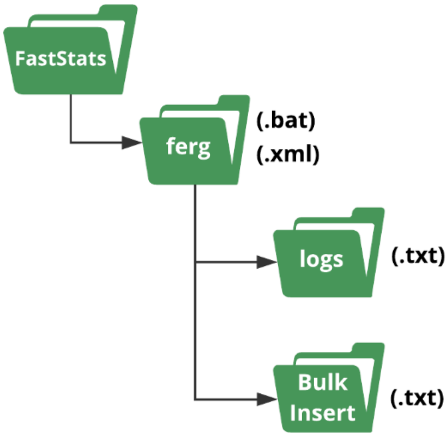
You will need to create folders to store the files to use with the Response Gatherer; these will include the following types of files.

Table 2 – Files Associated with the Response Gatherer

Type of file	Description
Batch (.bat)	Contains the information for applications like Task Scheduler or command-line programs to run the Response Gatherer on a schedule
XML (.xml)	Contains the connection and communication parameters used to connect to the broadcaster
Text files (.txt)	The Response Gatherer will generate two log files each time it runs, an Event log with the times each event occurred, and a Details log with a step by step log of the digital response batch process with the broadcaster

You can create the directories in any user-defined location and use your own choice of name; you must refer to the directories in the batch file.

A typical example folder structure



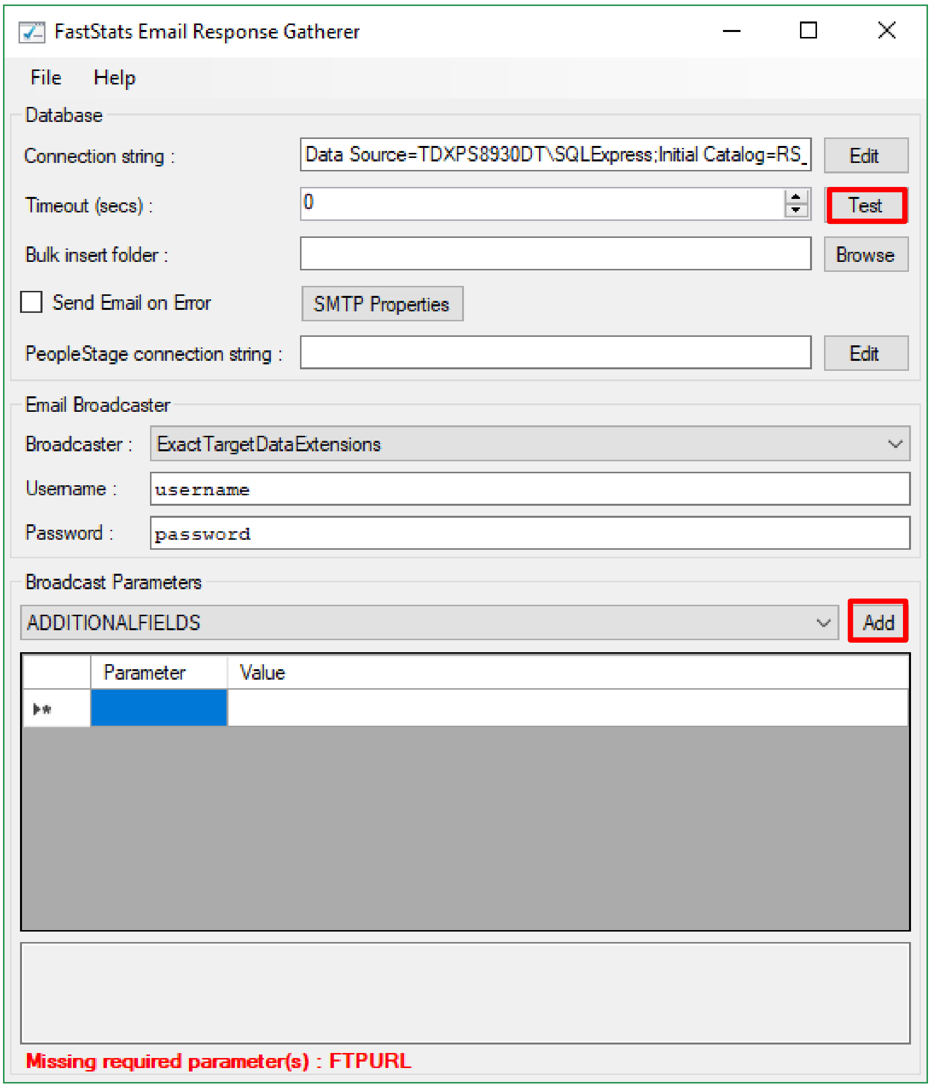
Important:
The bulk insert directory must be accessible from the SQL server and the user running the SQL Server Service must have read permissions to it.

3.5 Creating the Configuration File

You will need to create an XML file containing the configuration settings to use with the Email Response Gatherer; the XML file is specified in an argument when you run the EmailResponseGatherer.exe

Note:
You can use the Response Gatherer with multiple integrations by using an XML and matching batch file for each integration.

1. Browse to the directory where you installed the Email Response Gatherer and open the **EmailResponseConfig.exe**, enter your Connection String and click **Test**
2. Select Salesforce from the Broadcaster drop-down list
3. Enter the **Username** and **Password** to use with your FTP site
4. Use **Add** to add all the required parameters for the Broadcaster
5. Use the **File** menu to save the XML file to the batch and XML file folder

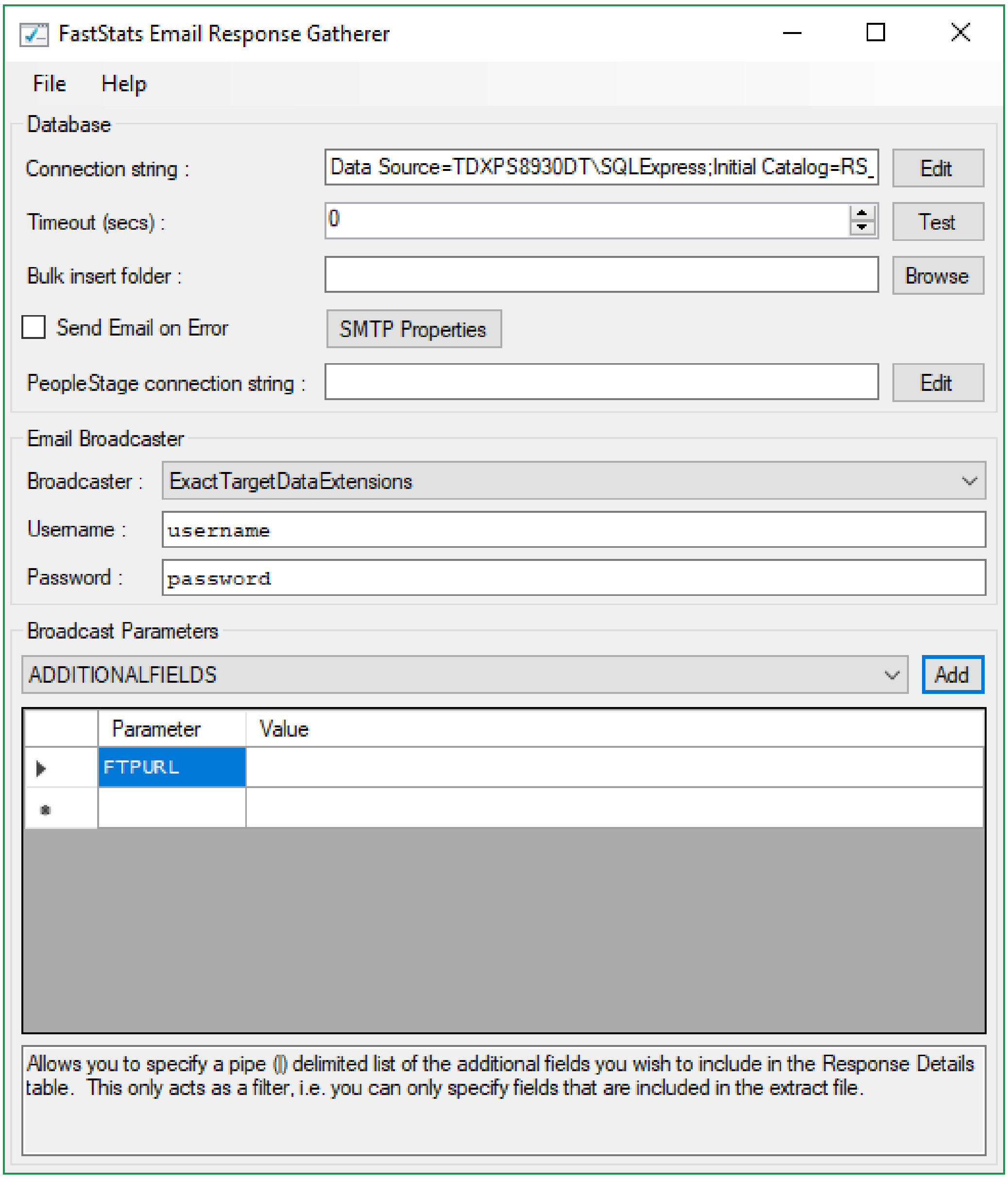


Note:
The Email Response Config application displays a warning message about required parameters until you have included them all.

Table 3 – EmailResponseConfig Parameters

Dialogue Item	Settings to use
Connection String	The connection string to the response database for your system
Timeout (secs)	The timeout (in seconds) for the connection and query steps, the default is 1200 seconds
Bulk insert folder	The location to store the results to optimize the processing of campaigns that generate large volumes of data, SQL Server can BULK COLLECT from this location
PeopleStage Connection String	Used for certain broadcasters, to retrieve metadata from the PeopleStage database Not applicable with Salesforce

Email Response Config dialogue with REQUIRED FIELDS completed



See **Appendix A** Email Response Gatherer Parameters for a full list of available parameters to use with the Email Response Gatherer.

3.6 Scheduling the Response Gatherer

You need to set FERG to run on a scheduled basis, provide it with the broadcaster's communication details (in a .xml configuration file) and the location to output the Log files; this example uses Windows Task Scheduler however you can use any similar application or create Command Line (.cmd) files manually.

Creating the Batch Files

The batch files provide the Response Gatherer with the Log file directory and the name of the XML file to use.

Create or modify the batch file using Notepad++ or similar text editor, see appendix B for an example file, save the file to the batch and xml file directory.

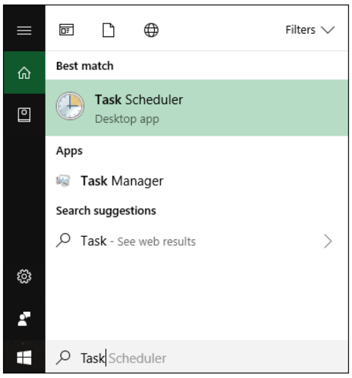
Using Task Scheduler

Using the Windows Task Scheduler, you can create multiple Tasks to run the Response Gatherer on a timed basis.

1. Open Windows **Task Scheduler**

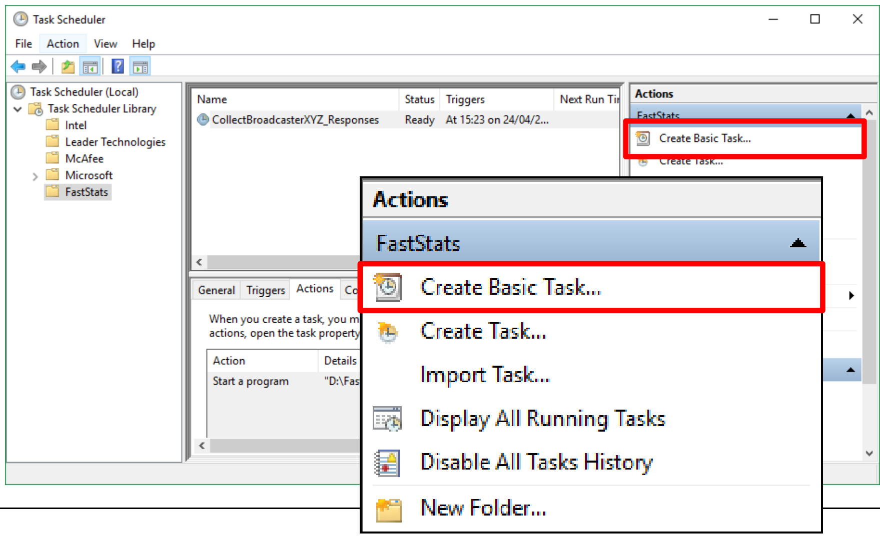
Tip

Search for **Task** in the Start Menu



The Windows Task Scheduler opens

2. Select **Create Basic Task**

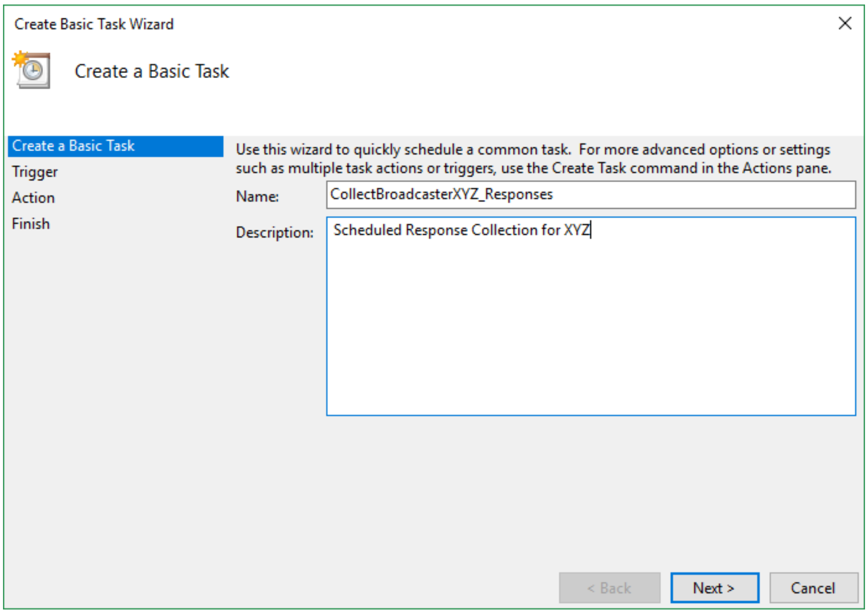


Tip:

You can create folders to organise your tasks

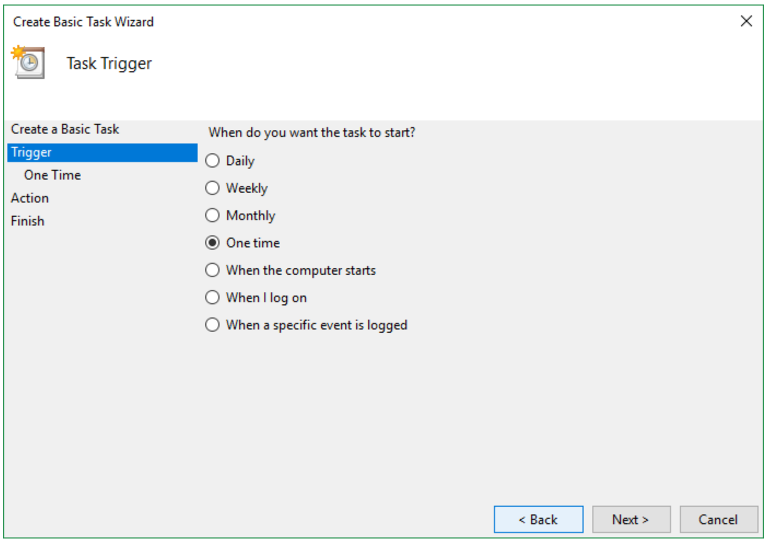
3. **Create a Basic Task** step

   a. Give your task a **Name** and **Description**

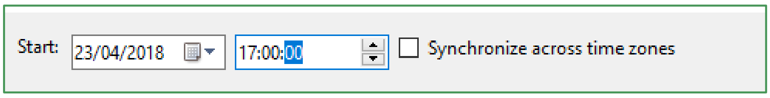


4. **Task Trigger** step

   a. Select the **Trigger** interval

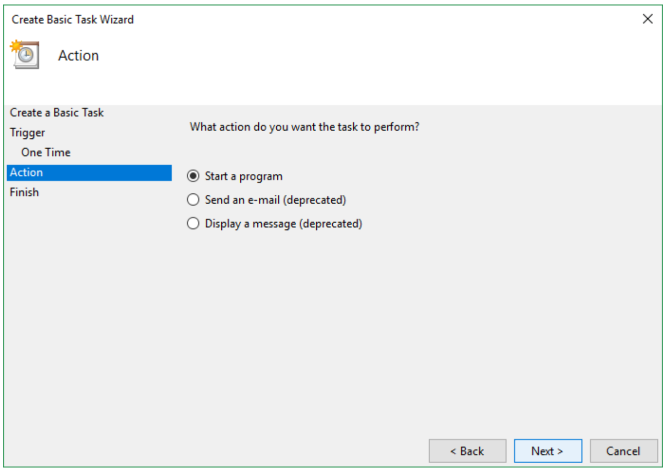


   b. Enter the Start Date and Time or relevant sub-step details



5. **Action** step

    a. Select **Start a program** and click **Next**

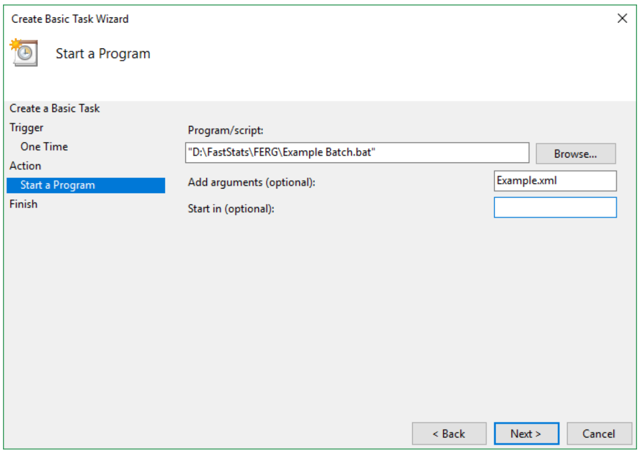


6. **Start a Program** Step

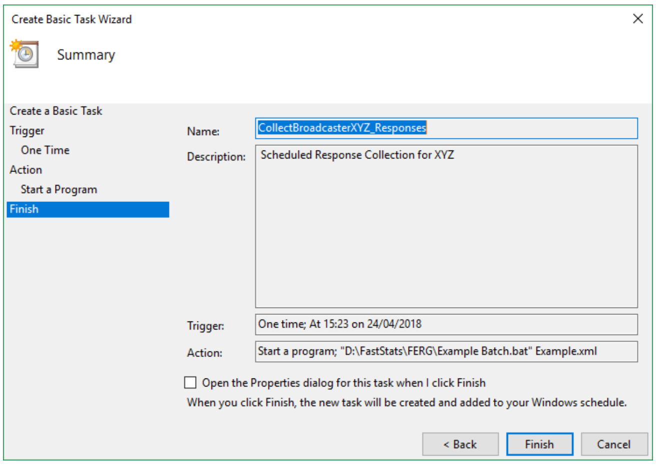
    a. Click **Browse** then navigate to the folder containing your batch files, select the file to use and click **Open**

    b. **Optional:** Provide the name of the XML configuration file in the **Add arguments** box, click **Next**

Note: The XML file is typically included in the batch file.



7. **Summary** step – Click **Finish**



4 FastStats Broadcasting & Responses

Notes:

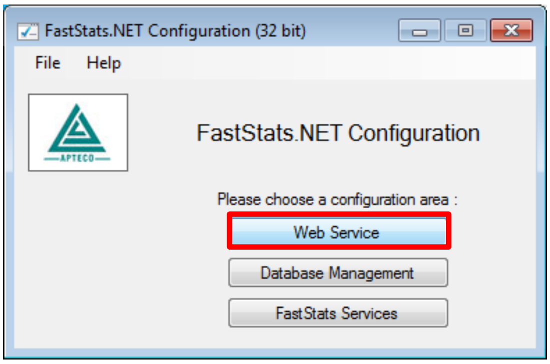
You must log in as an administrator to perform the following task.

The Email Broadcasting Wizard is required for FastStats use only.

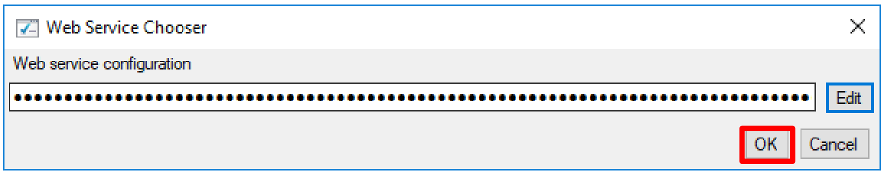
4.1 Enable Email Broadcasting

You must enable the Email Broadcasting wizard plugin.

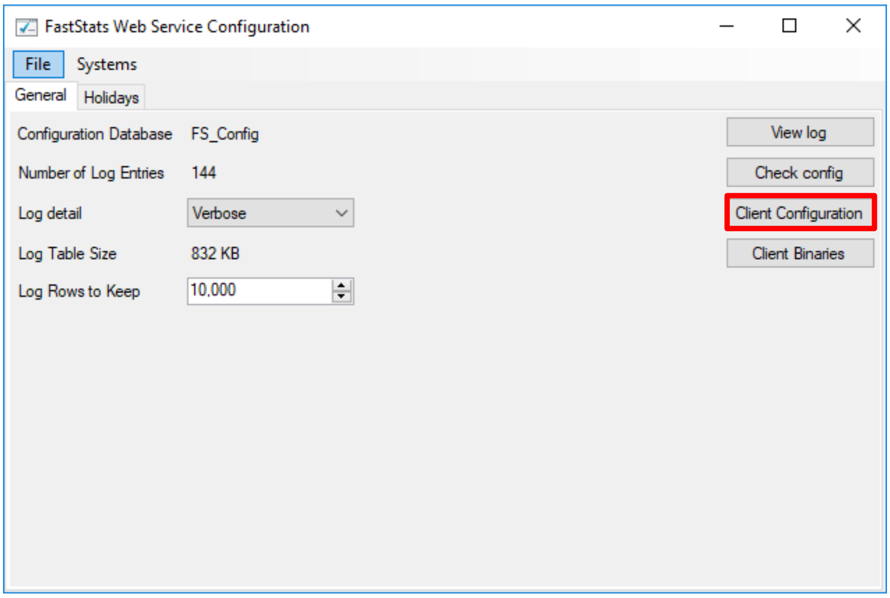
1. Open the **FastStats Configurator**
2. Select **Web Service**



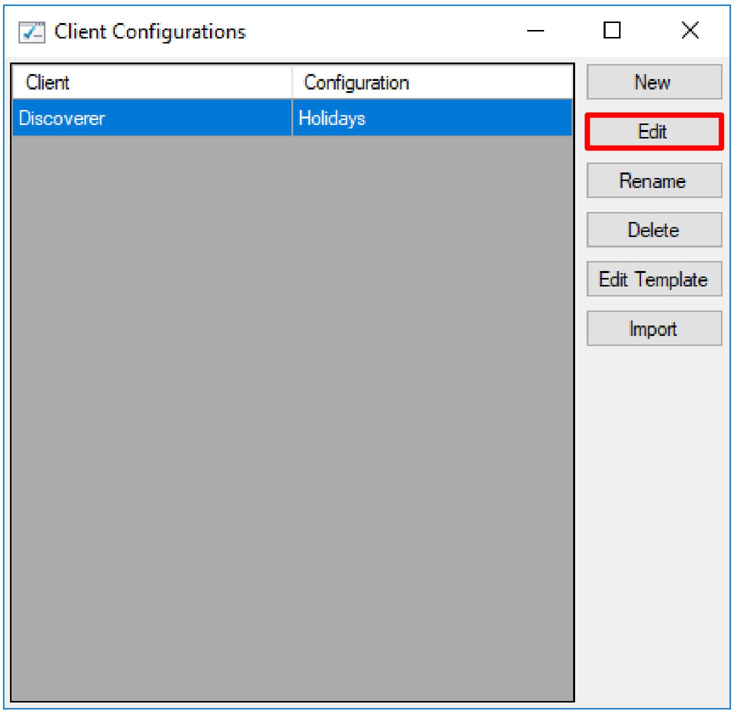
3. Click **OK** on the Web Service Chooser dialogue box



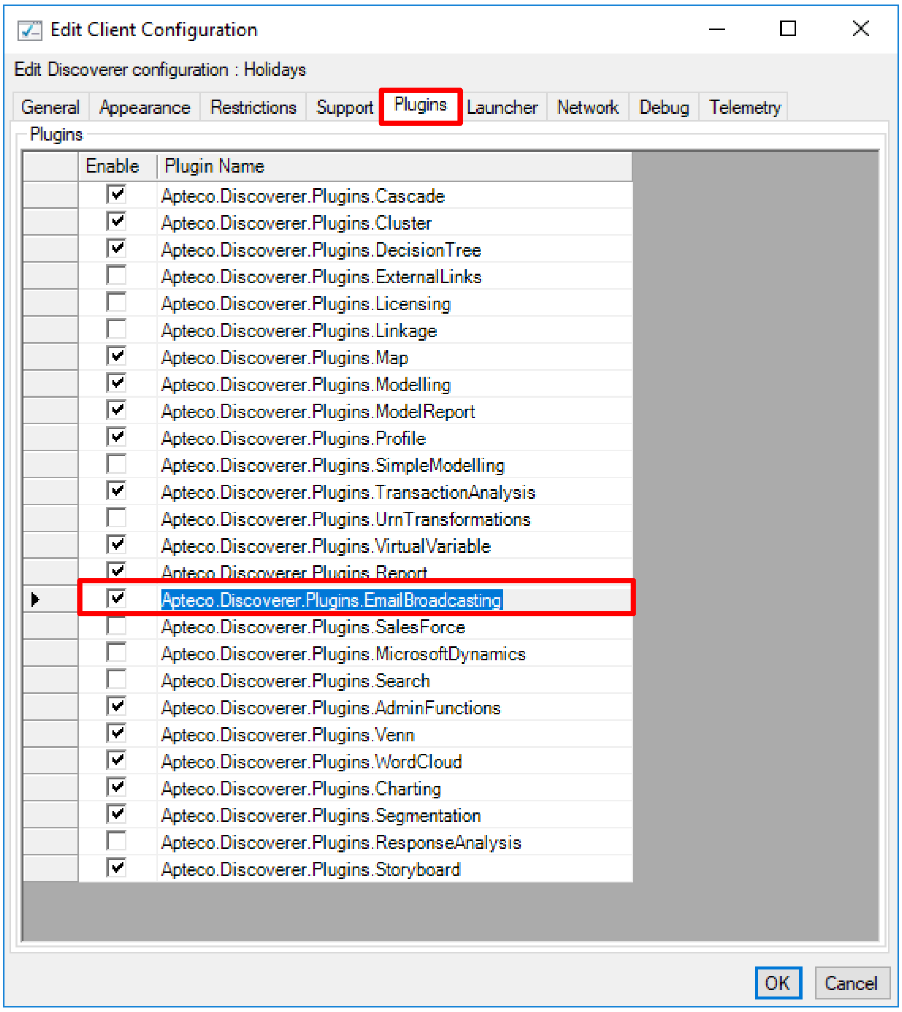
4. Click **Client Configuration**



5. Select the Discoverer client associated with your system and click **Edit**

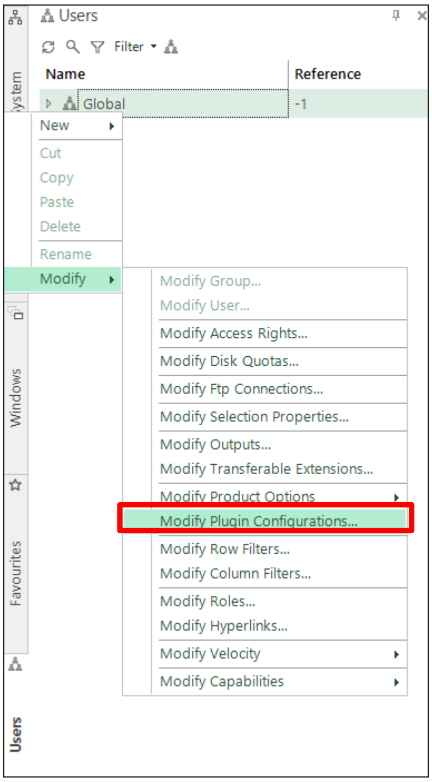


6. On the Plugins tab ensure the **Apteco.Discoverer.Plugins.EmailBroadcasting** check box is selected then click **OK**

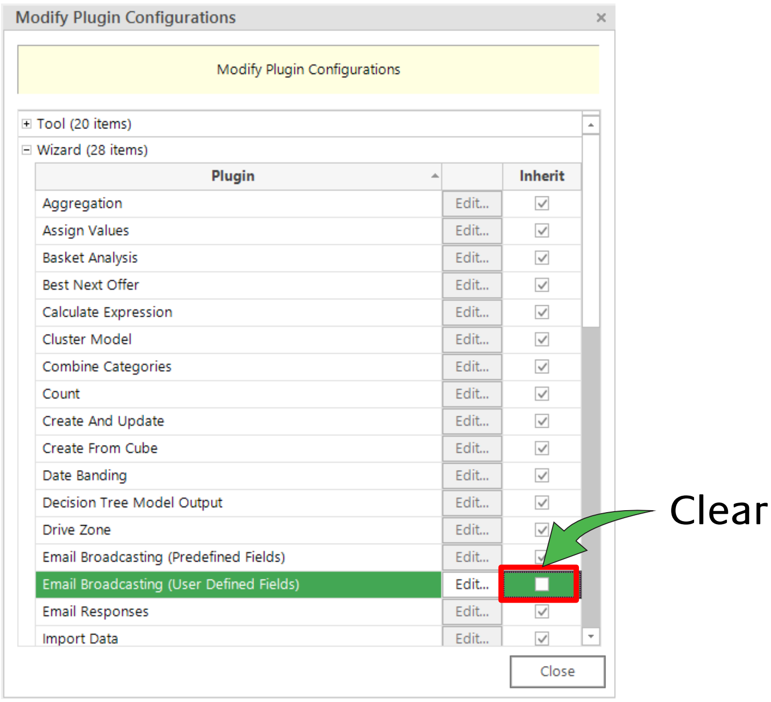


4.2 Configuration in FastStats

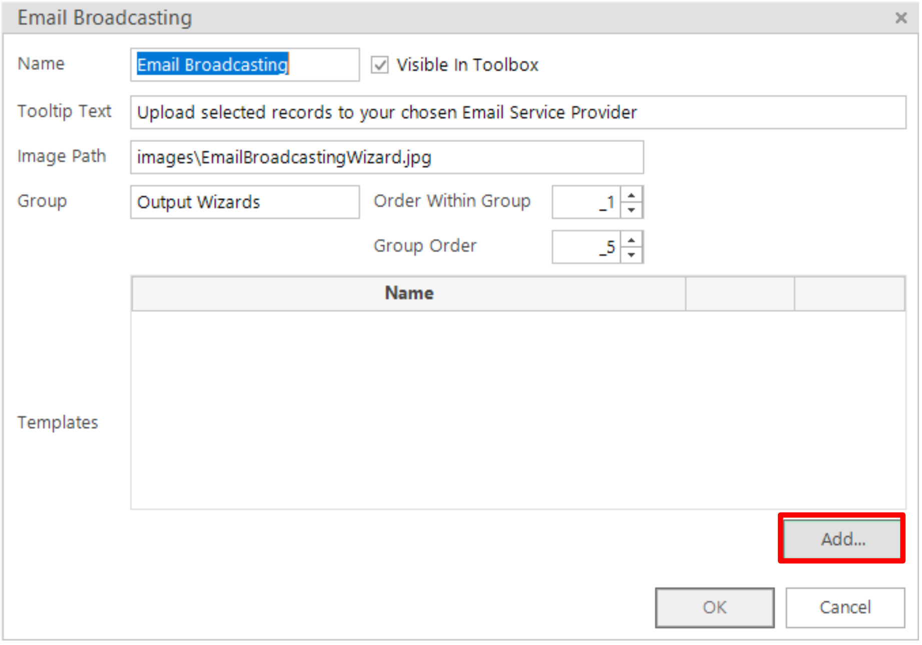
1. Open Apteco FastStats, select the **Users** explorer, right-click on the **Global** node then navigate to ***Modify*** > ***Plugin Configurations***



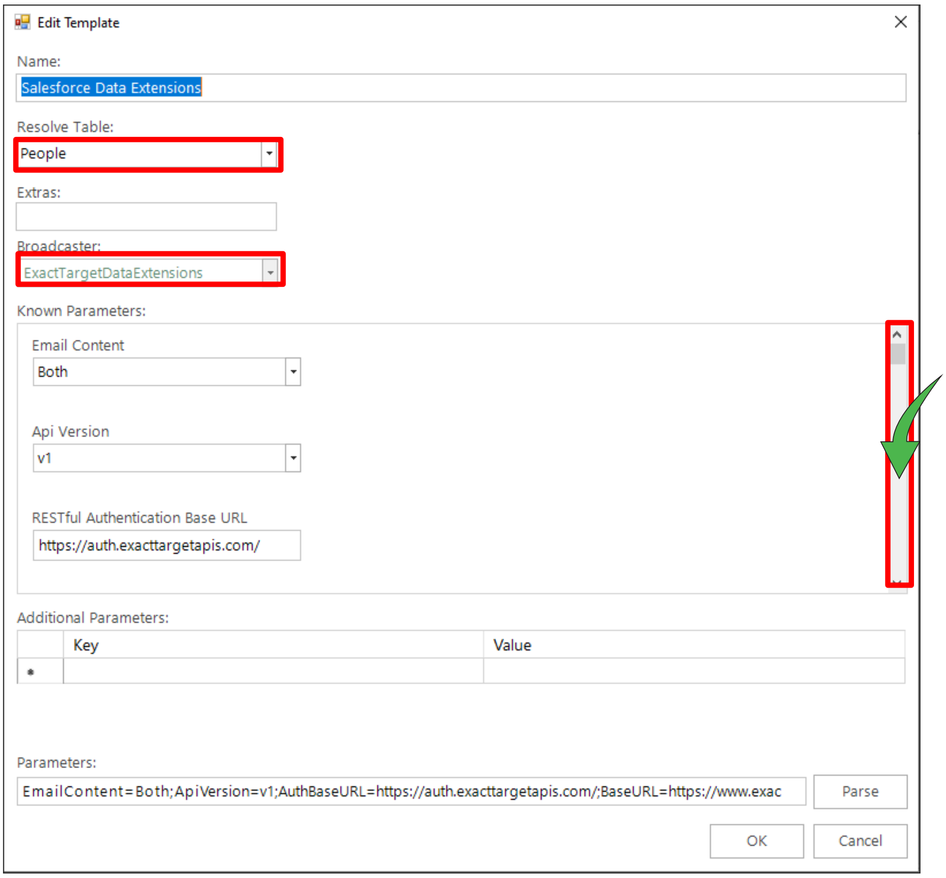
2. Expand the **Wizard** node then **clear** the **Inherit** check box for **Email Broadcasting (User Defined Fields)** and then click on the **Edit** button.



3. Click **Add** to add a new template



4. Enter a **Name**, select the appropriate **Resolve Table** from the drop-down and select **Salesforce** from the Broadcaster drop-down.



Note:
Scroll to enter the Known Parameters information, * indicates a required parameter.

Complete the template parameters form with the required settings for your Salesforce account.

Note:
The Salesforce Marketing Cloud is a highly configurable system, many of the parameters listed below are not documented here, they are marked as “Reserved for advanced use”. For more information on how to obtain the values for *commonly used parameters please see Appendix A.

Table 4 – Edit Template Known Parameters Settings

Parameter	Reqd.	Settings to use
Email Content	Y	Select which builder you are using in the Salesforce Marketing Cloud, options are: • Classic • Builder • **Both**
API Version	Y	All new accounts with Salesforce will be on v2, you can check if your existing API Package is a Legacy API v1 from Setup – Apps > Installed Packages
RESTful Authentication Base URL	(v2 Y)	e.g. https:// 0f4wbzr4nlfssl wi2u612psbpg7g.rest.marketingcloudapis.com/
RESTful Base URL	(v2 Y)	e.g. https://0f4wbzr4nlfssl wi2u612psbpg7g.rest.marketingcloudapis.com/
*Client Id	Y	Client ID for the Profile
*Client Secret	Y	Client Secret for the Profile
Api Timeout		Timeout (in secs) to wait for API the default is 300
Triggered Send Definition		Reserved for advanced use
Use Triggered Sends		Reserved for advanced use
Sendable	Y	true
Publication List		Reserved for advanced use
Triggered Send Data Extension		Reserved for advanced use
Use Urn As Subscriber Key		true
Subscriber Key Name		Subscriber Key
*Send Classification	Y	e.g. Default Commercial see the setting in the Marketing Cloud ***Admin*** > ***Send Classifications*** section
*File Transfer Location	Y	ExactTarget Enhanced FTP See the setting in the Marketing Cloud ***Admin*** > ***File Locations***
*Sender Profile	Y	A GUID obtained from the Marketing Cloud ***Admin*** > ***Sender Profiles***
* Business Unit		Optional, used where there are more than one business unit
Data Extension Retention Period		Reserved for advanced use

Owner Member ID		Reserved for advanced use
Owner Member Name		Reserved for advanced use
URL (API URL)	Y	https://webservice.exacttarget.com/Service.asmx
Upload and Broadcast Folder	Y	The message Upload folder under the Data Extensions tree to organize your broadcasts, this can be an absolute path to the folder, or you can use the following parameters, e.g. <FolderPath>\%LISTNAME%\%MESSAGENAME% where FolderPath is a folder or path in your Data Extensions tree.
Upload Only Folder	Y	The Upload only folder where Salesforce your broadcasts that will the same options as above can be used here.
Upload Empty Lists	Y	True
SFTP Private Key Path		Reserved for advanced use
Dated List Format		yyyyMMdd-HHmmss
FTP Protocol		ftp
FTP Username	Y	Obtain this from Salesforce
FTP Password	Y	Obtain this from Salesforce
Throttle Start Time		Reserved for advanced use
Throttle End Time		Reserved for advanced use
Throttle Limit		Reserved for advanced use
Encoding		UTF8
Account Username		This is the username that has been setup within Salesforce
Ues Dated List		True (check-box selected)
*FTP URL		sftp://username:pwd@ftp.apteco.com/folder/{FILENAME}
Encoding		Default

Note:
*These settings will be specific to your Salesforce account.

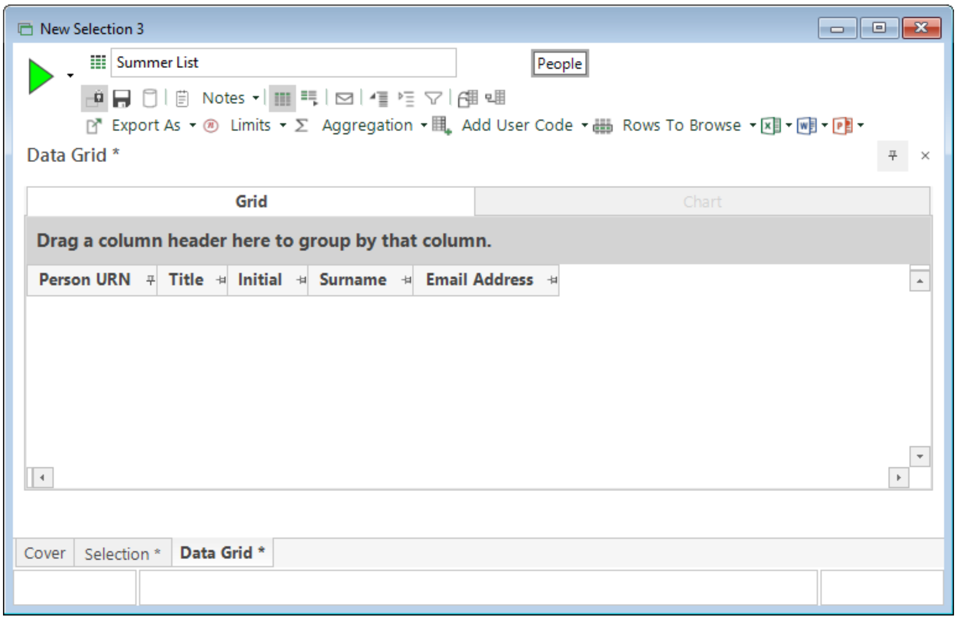
Note:
You will need to exit out of FastStats and log in again for these changes to take effect.

4.3 Checking your configuration

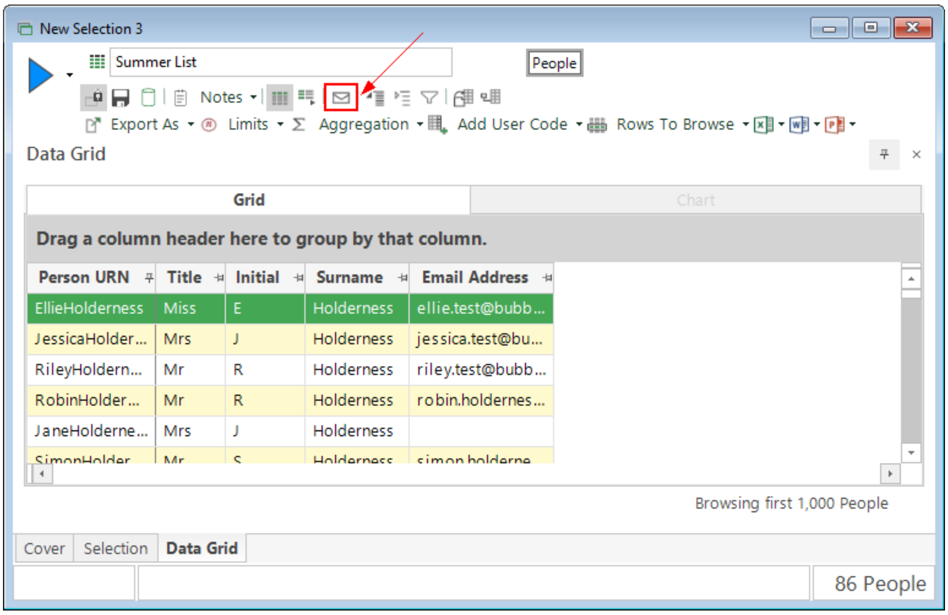
You can test the configuration by creating a Data Grid and using the email Broadcast Wizard; this will send a message to the people in your selection.

Note:
You must set up a message in Salesforce before performing this step see **Appendix A Configuring Salesforce.**

1. Create a **Data Grid** based on the appropriate selection criteria and drag on the variables that you want to pass to Salesforce (one must be an email address)



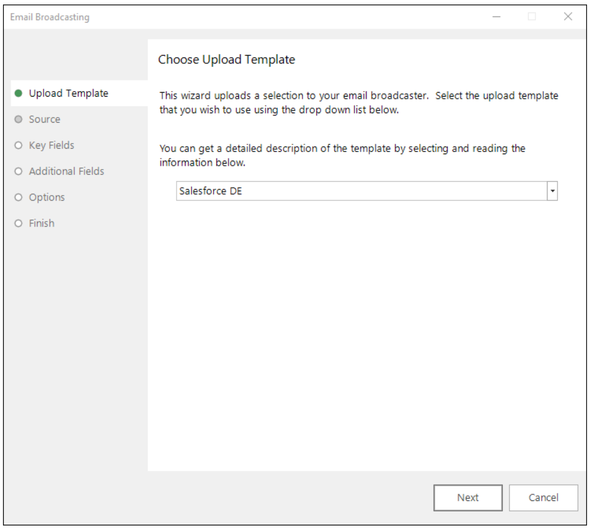
2. Click the **Email Broadcasting** icon



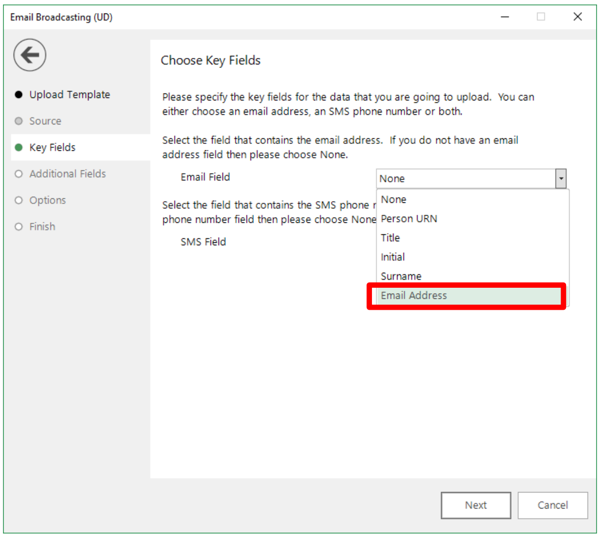
The **Email Broadcasting Wizard** opens

3. Choose the **Salesforce** template from the drop-down list and click **Next**

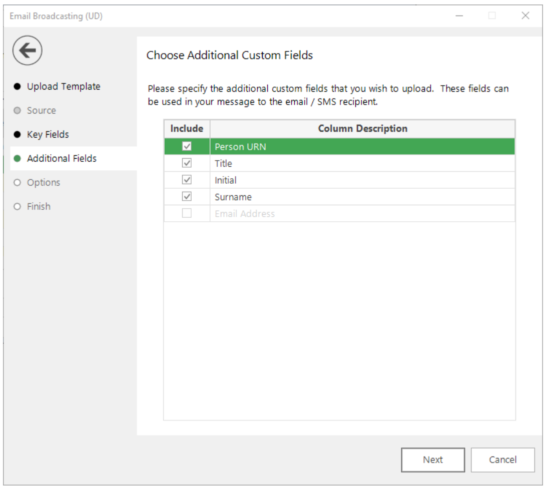
Note:
The wizard will omit this step if you have only one Upload Template



4. Choose the email field and click **Next**



5. Review the additional fields that will be sent as part of the list and click **Next**



6. Complete the **Email Broadcasting Details** form then click **Next**

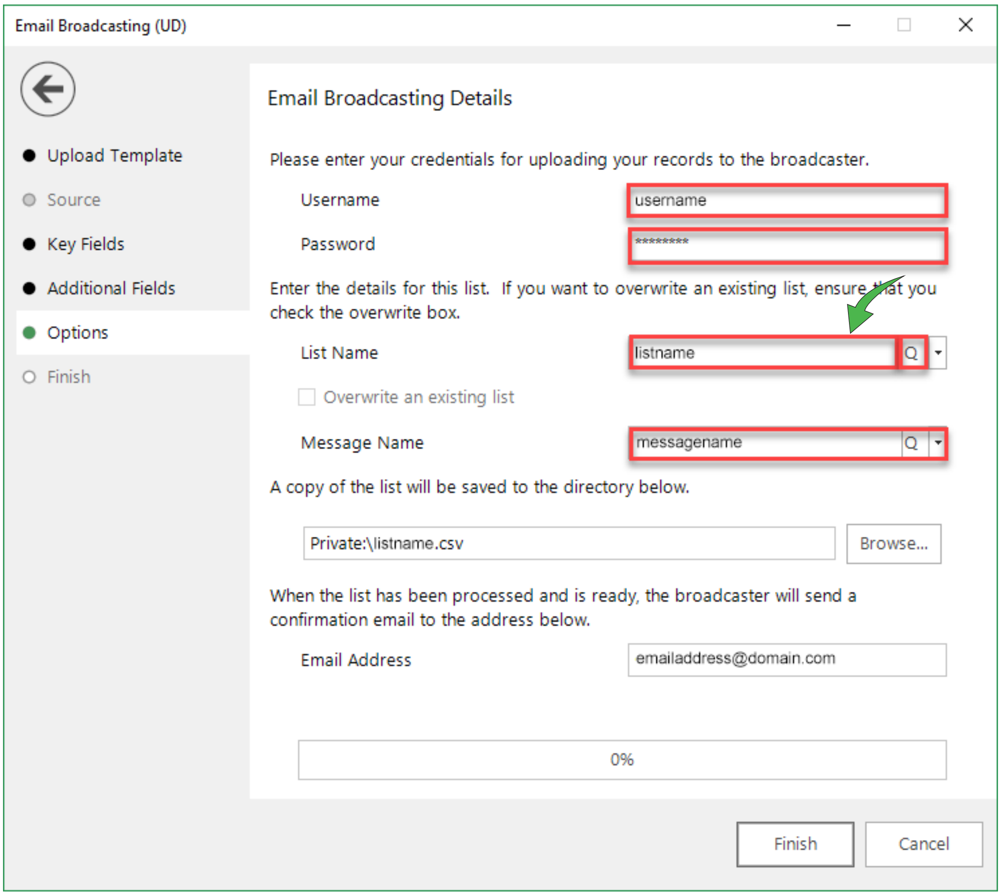
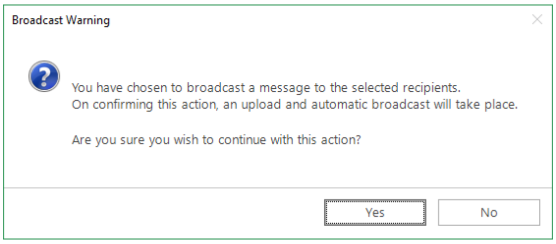


Table 5 – EmailResponseGatherer.exe.config Settings

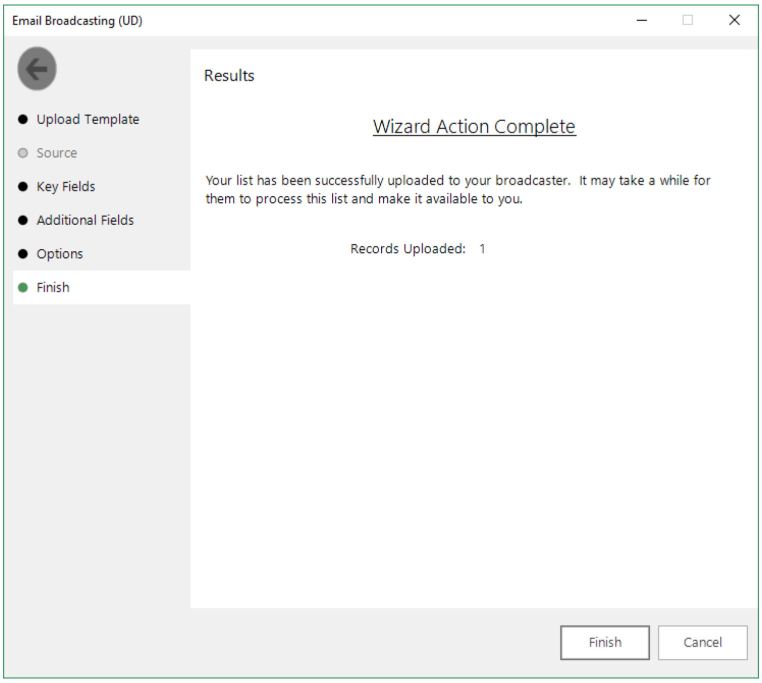
Option	Settings to use
Username	The username for your Salesforce account
Password	The password for your Salesforce account
List Name drop-down	Click on the List Name retrieve button and select a list from the drop-down (this appends any new records to the list) or enter a new List Name
Message Name	Click on the Message Name retrieve button and select one from the drop-down or leave it blank if you only want to upload your list
A copy of the list will be saved to the directory below	Browse to the location where you wish to save a copy of the list
Email Address	Enter an Email Address FastStats will use this to notify you once the list has been processed and then click Next

7. If you entered a message name, a Broadcast Warning message displays meaning this will send a message to your target audience

Click **Yes** to commit this action



8. Once the list has been uploaded (and if applicable the message delivery has been scheduled), the wizard will complete. Click **Finish** to close the wizard.

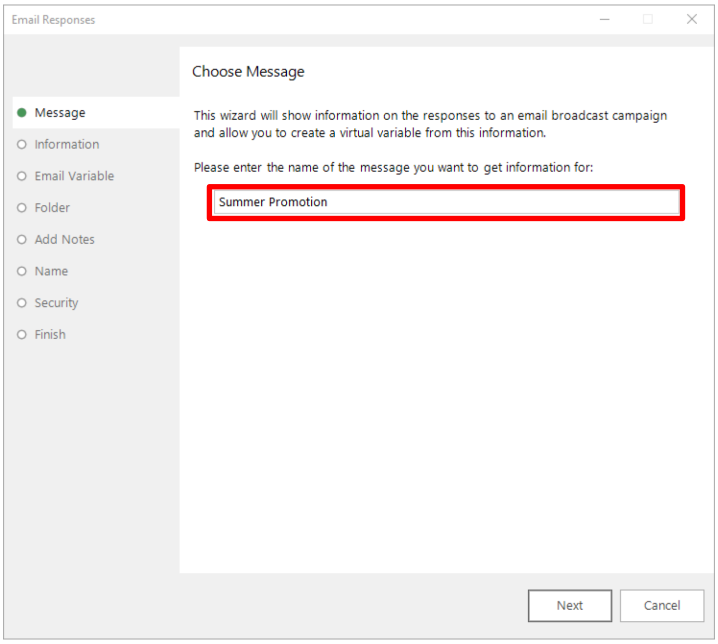


Note:
You will need to exit out of FastStats and log in again for these changes to take effect.

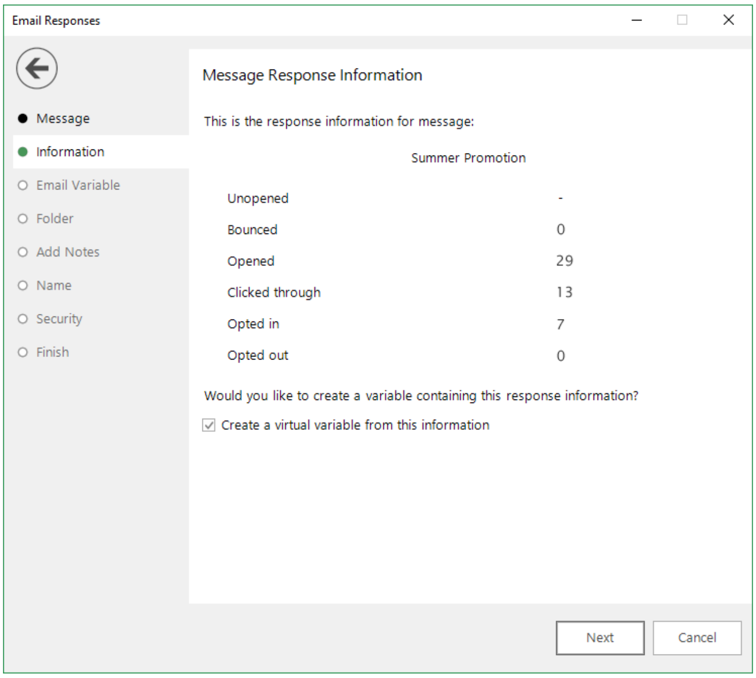
4.4 Email Responses Wizard

When your emails have been sent out you can start analysing the responses from your target audience.

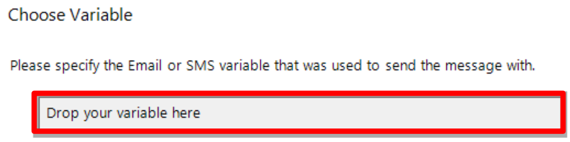
1. Open the **Email Responses** wizard
2. Enter the name of the message that you used in the Email Broadcasting wizard and click **Next**

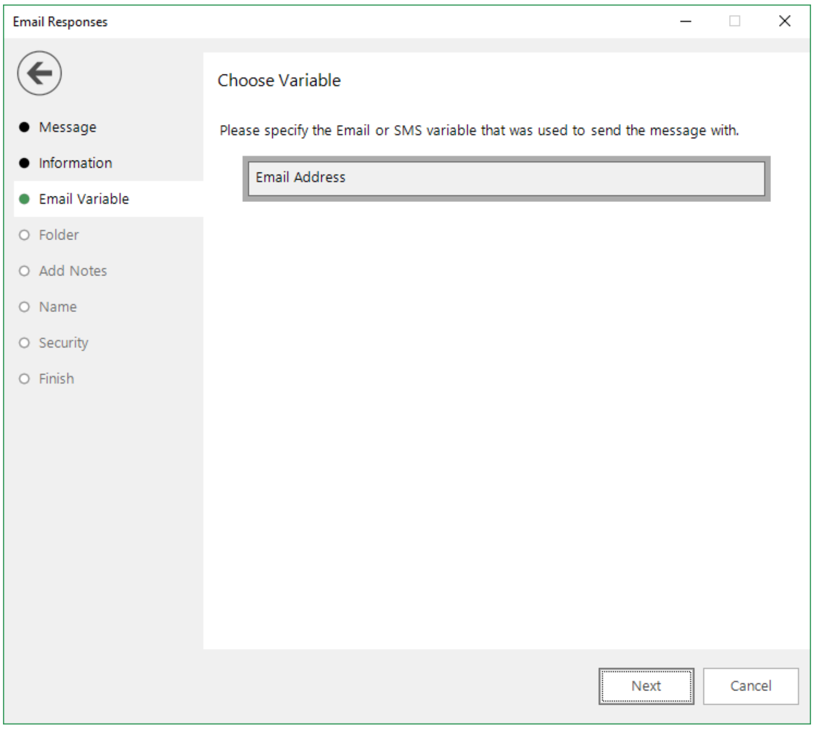


3. As the Email Response Gatherer starts collecting information from Salesforce, you will see how customers are interacting with your broadcast. If you want to analyse this information further, click on Create a virtual variable from this information and then click Next

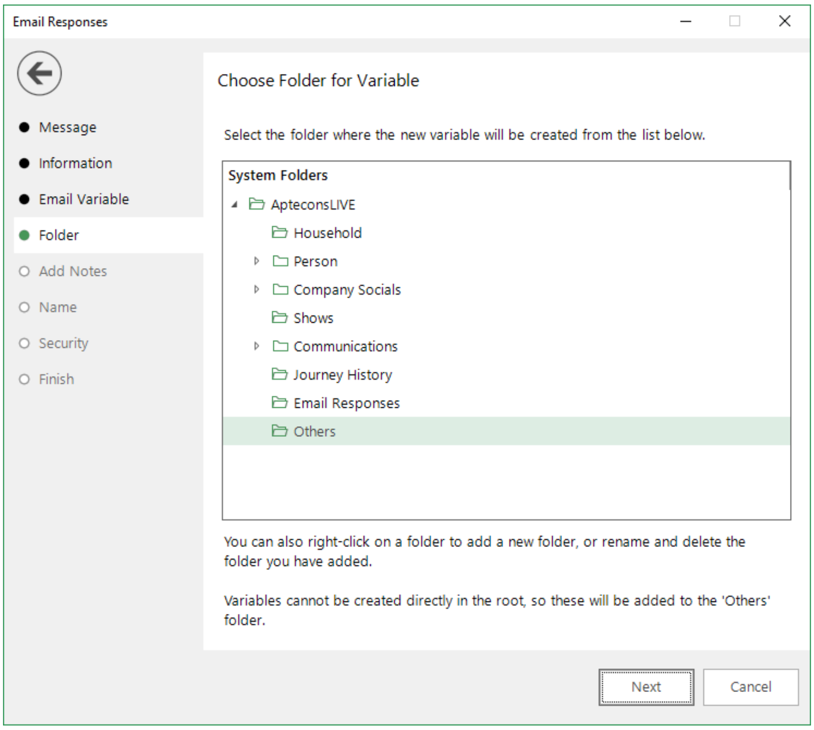


4. Drag the Email variable that you used in the Email Broadcasting wizard onto the drop box and click **Next**

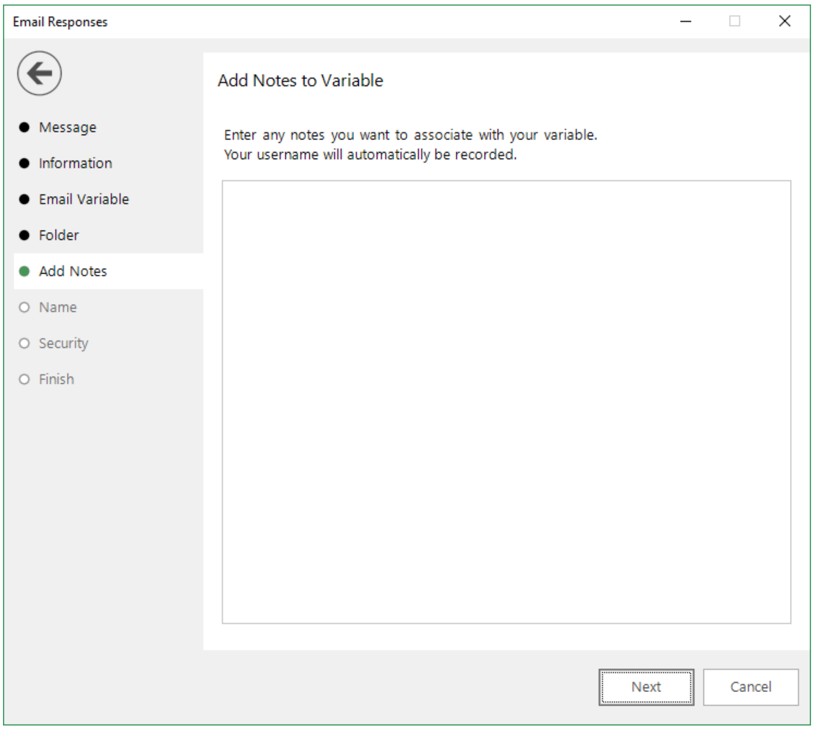




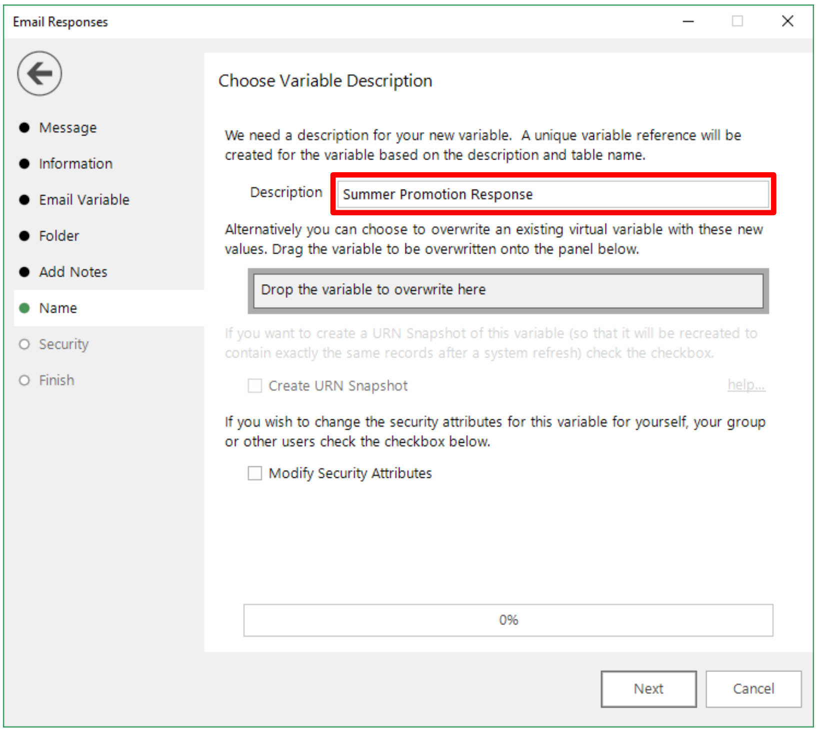
5. Locate the folder where you wish to store the virtual variable and click **Next**



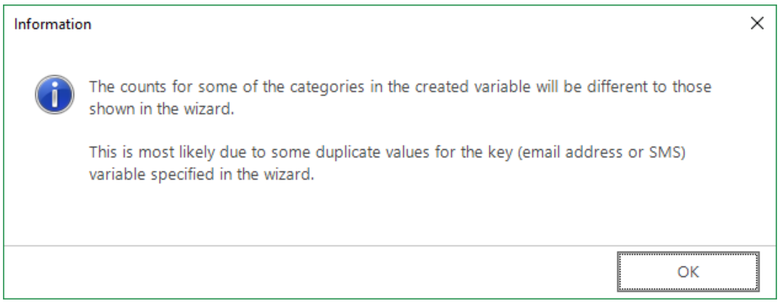
6. Enter any notes that will be stored along with the virtual variable and click **Next**



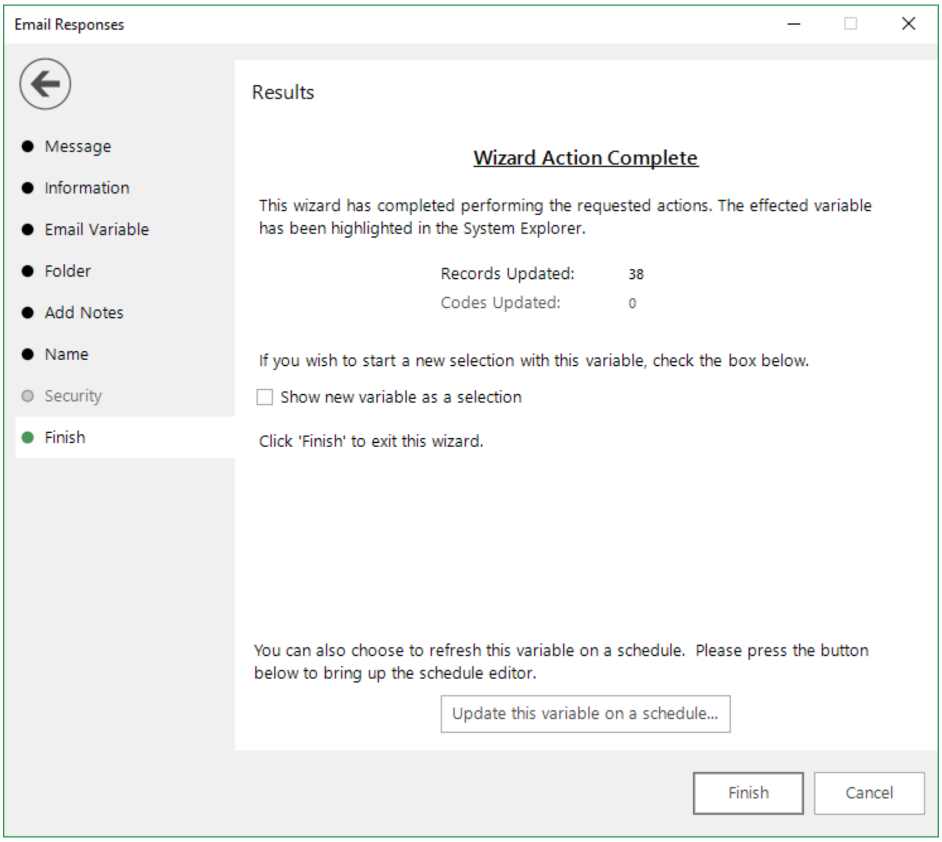
7. Enter a Description for the virtual variable or drag an existing virtual variable onto the drop box if you wish to overwrite it. Modify the Security Attributes if applicable and then click **Next**



8. Click **OK**



9. Click **Finish**

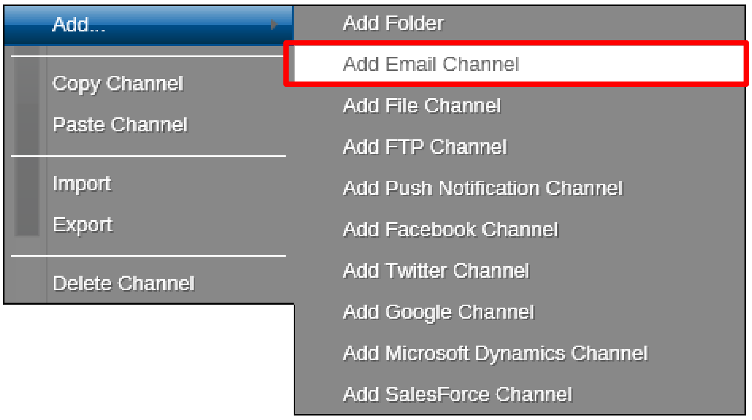


5 PeopleStage Broadcasting & Responses

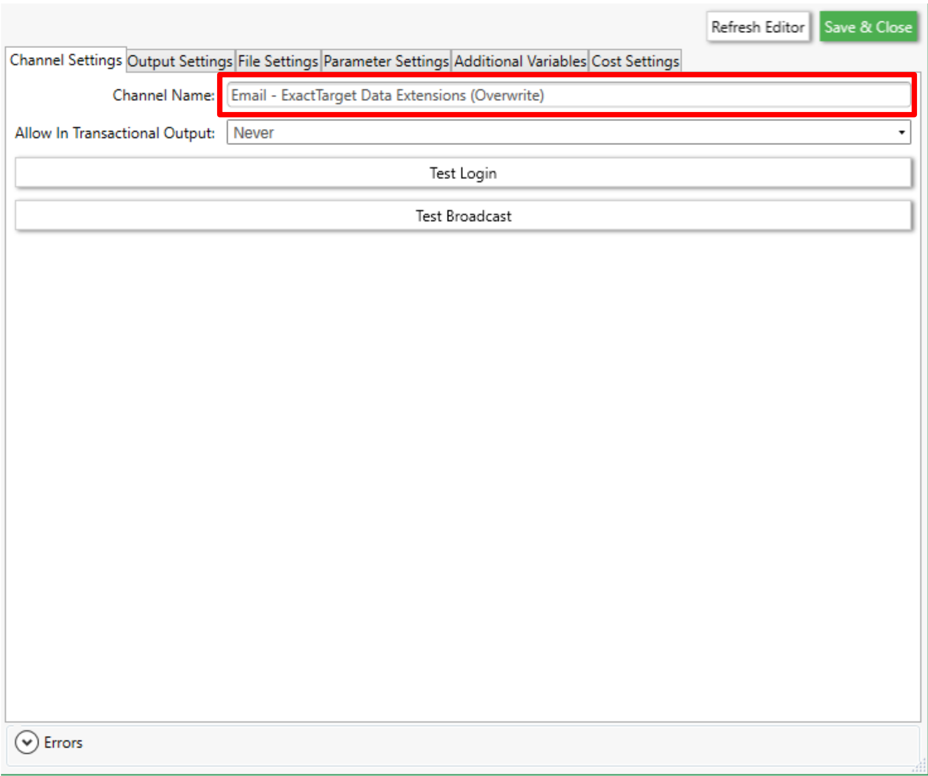
5.1 Defining the Broadcast Channel in PeopleStage

To use Salesforce with PeopleStage, you must set up a channel that defines the settings and parameters and any fields that you always want to send to Salesforce.

1. Open PeopleStage, select *File* > *Administration* > *Channel Editor*. Click **Add Email Channel** through the context menu within a folder



2. Enter a name in **Channel Name**



Note:
(Optional) Select Yes from the **Allow In Transactional Output** (you need to be careful if you select this option, as it means we can send multiple emails to the same email address)

3. Define Output Settings for Salesforce

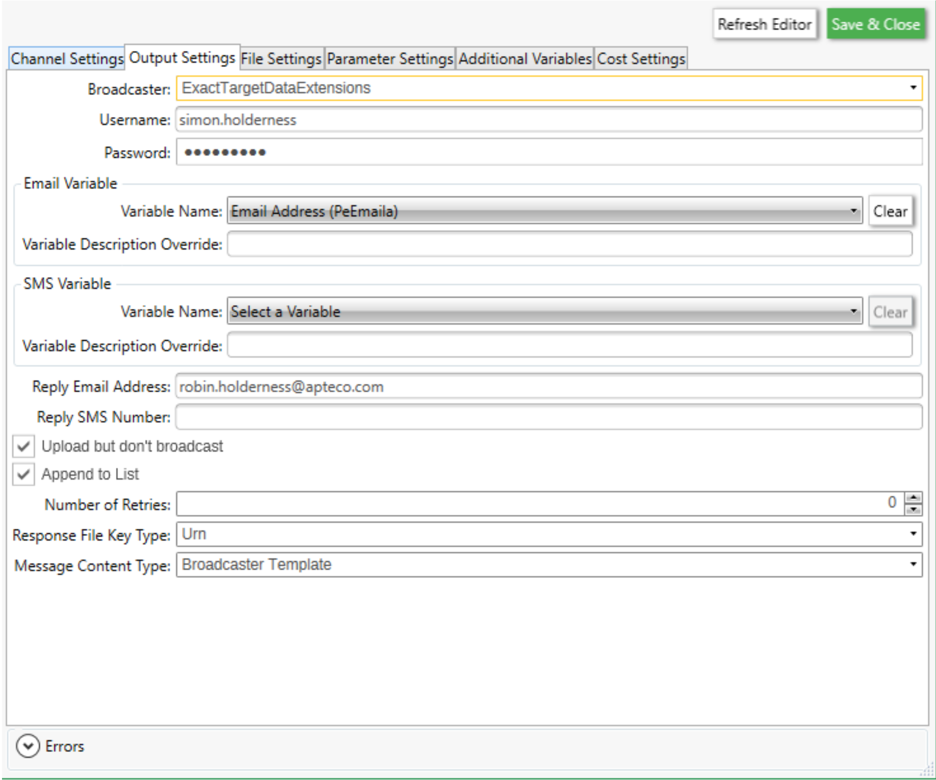
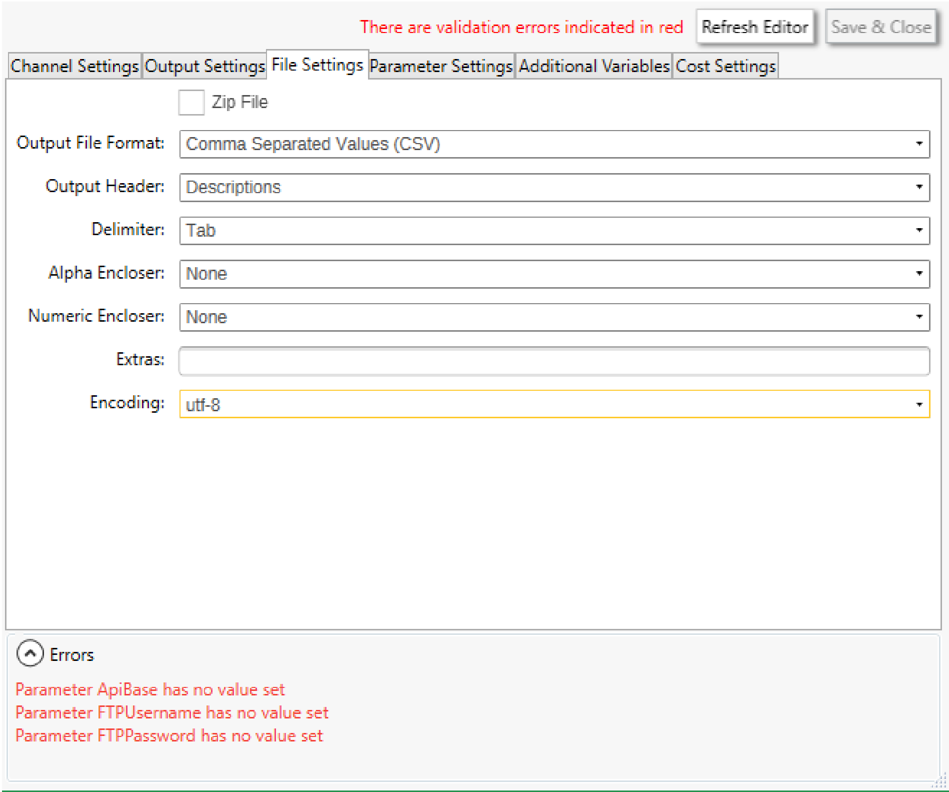


Table 6 –PeopleStage Output Settings

Field	Settings
Broadcaster	Select **ExactTargetDataExtensions** from the drop-down
Username	Enter your **API username**
Note: Prefix the username with the account name separated by a full stop	
Password	Enter your **API password**
Variable Name	Select **Email Address** from the drop-down
Variable Description Override	Enter the description, for example, “Email Address” **Note:** This must correspond to the e-mail field within Salesforce
Upload but don’t broadcast	(Optional) – Select this check box to upload the list only without initiating a broadcast
Reply email Address	The email address that will receive notifications when the channel is used, i.e. list uploaded / broadcast. **Note:** This is not the reply email address that will be used for the email send.
Number of Retries	The number of times to retry on failure of the channel. It is recommended (for Broadcast Channels) to leave this at 0. The Delivery Agent also has a retry value, so setting this to > 0 can result in multiple retries and may cause undesirable results
Response File Key Type	The key field to match responses to sends. Varies from broadcaster to broadcaster due to the fields they return in the response file. Should be set to Communication Key for Salesforce.
Message Content Type	Only Dynmark has the ability to use PeopleStage templates so this will always be Broadcaster Template. This is where the creative comes from.

4. Complete the **File Settings**



Note:

The default Encoding is Windows-1252 if you change use the same setting on the **Parameter Settings** tab

5. The ESP **Parameter Settings** tab is blank by default, select parameters from the drop-down and click **Add** to complete the form

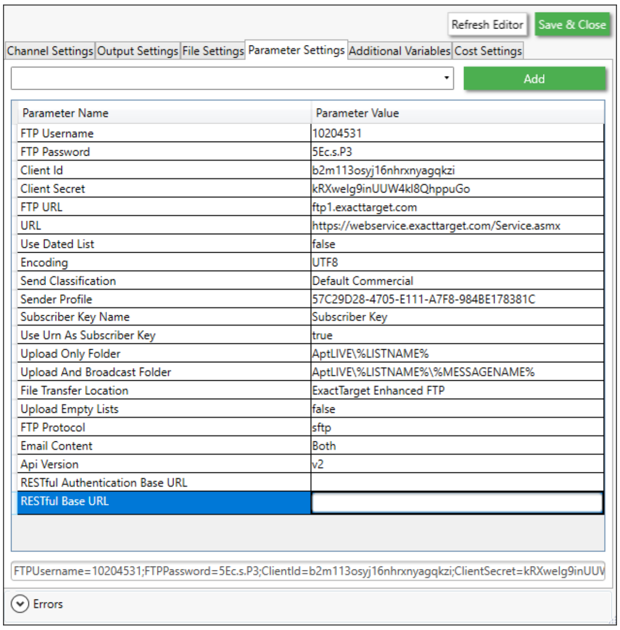
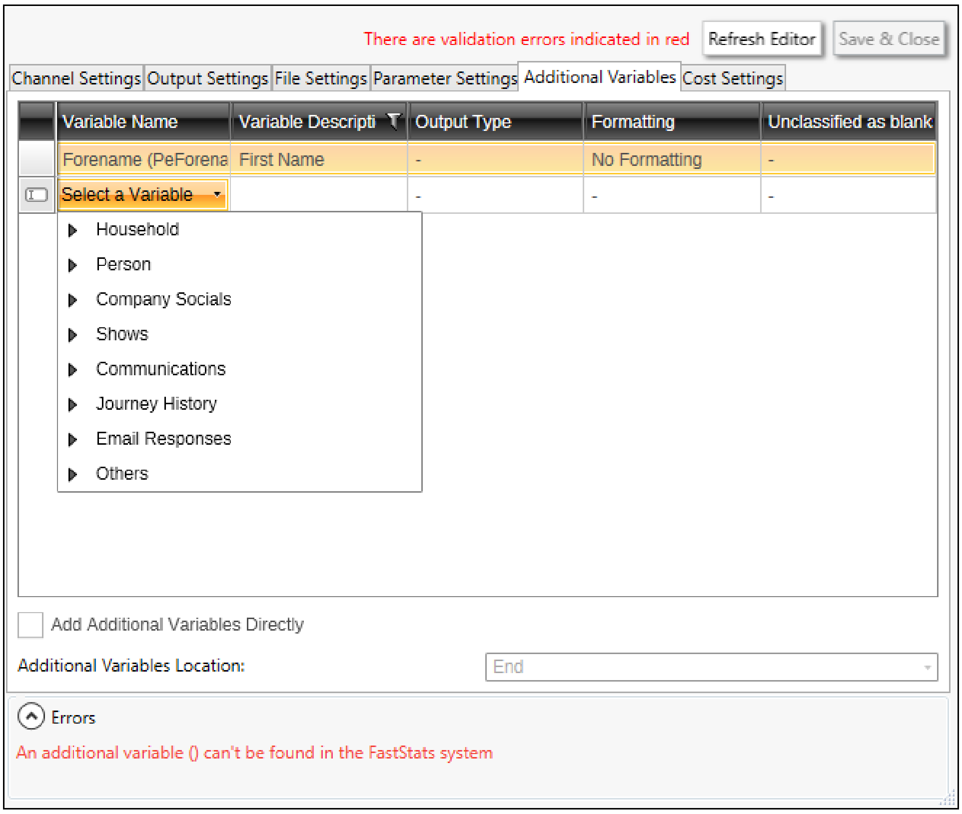


Table 7 –Example PeopleStage Parameter Settings

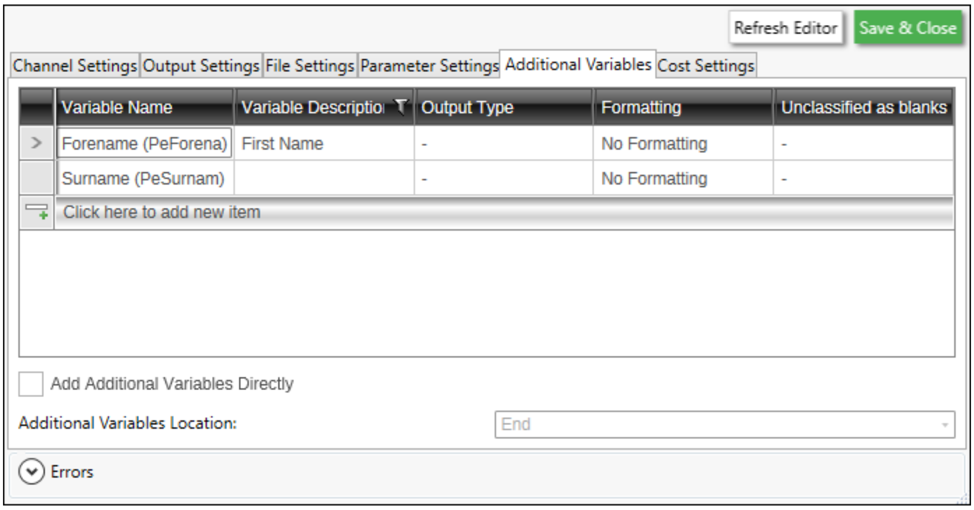
Field	Settings
	*Example, these will be specific to your account and you may need to contact salesforce, see Appendix A
FTP Username	*10345678
FTP Password	*6Da.fP.4L
Send Classification	*Default Commercial
URL (API URL)	* https://webservice.exacttarget.com/Service.asmx
FTP URL	*sftp://10345678: 6Da.fP.4L @ftp.exacttarget.com/<folder>
Sender Profile	* 24C54B21-3708-F123-A4E8-973AF123381B
Use Urn As Subscriber Key	true
FTP Protocol	ftp
Upload Empty Lists	false
Subscriber Key Name	Subscriber Key
File Transfer location	ExactTarget Enhanced FTP
Upload And Broadcast Folder	These can be absolute paths to the folder, or you can use the following parameters
Upload Only Folder	e.g. Root\%LISTNAME%\%MESSAGENAME%
Use Dated List	If set to "true" you will create a new list in Salesforce for each broadcast
Encoding	UTF8
Client ID	Client ID for the Profile
Client Secret	Client Secret for the Profile
Email Content	Use Both or Content Builder should match how the content was created
Api Version	All new accounts with Salesforce will be on v2, you can check if your existing API Package is a Legacy API v1 from Setup – Apps > Installed Packages
RESTful Authentication Base URL	e.g. https:// 0f4wbzr4nlfssl wi2u612psbpg7g.rest.marketingcloudapis.com/
RESTful Base URL	e.g. https://0f4wbzr4nlfssl wi2u612psbpg7g.rest.marketingcloudapis.com/

See **Appendix** A for all the available parameters

6. Add any additional variables on the **Additional Variables** tab



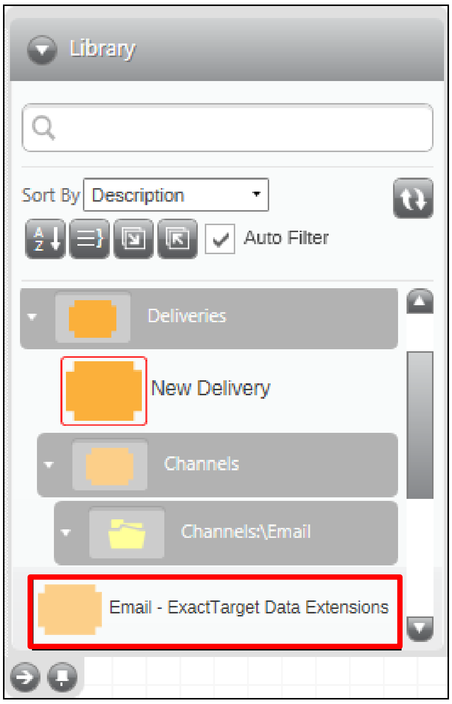
7. Click **Save & Close**



5.2 Broadcasting in PeopleStage

You can now test your channel at any Delivery Stage

1. You can drag your new Salesforce channel from the Library to your Delivery step



2. You can select from the available messages in Salesforce from the Message Name drop-down or use PeopleStage's functionality to dynamically select a message, to use a different language for example.

3. You can use the same **List Name** as the **Message Name** or define a custom one

Selecting the **Requires Manual Approval** check box gives the option to view a sample list before processing

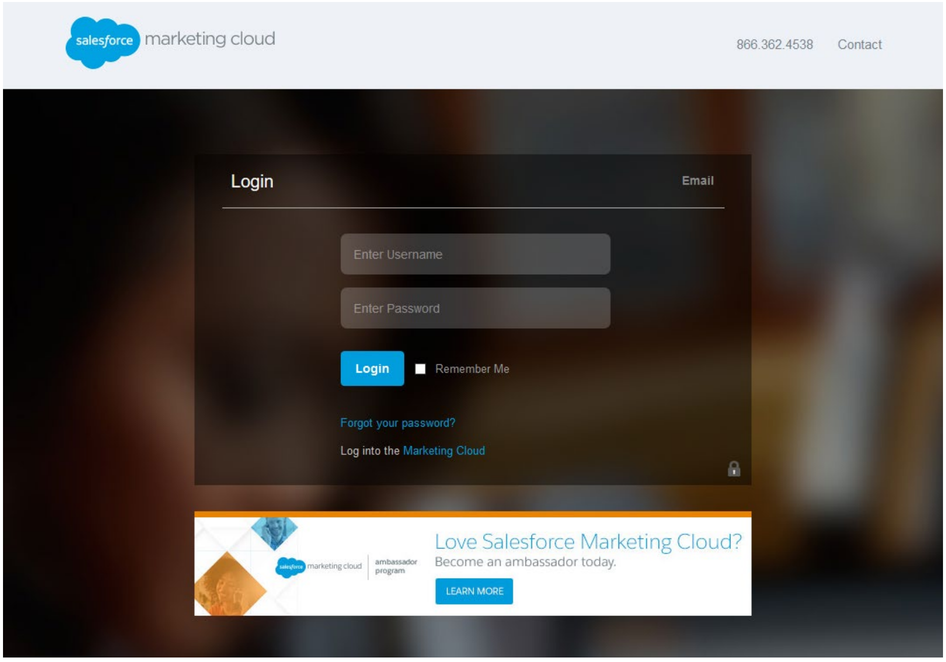
Appendix A: Salesforce Configuration

Salesforce Data Extensions works on the principle of having a defined location to store the lists you upload. FastStats or PeopleStage will upload a list of subscribers and insert them into the Salesforce folders.

If you wish to automatically broadcast the list to a message either from the Email Broadcast wizard or PeopleStage, you need to create a message within Salesforce and you will need to create a Package in the Administration area as part of the setup in your Salesforce account.

Note:
This section is not intended as a full manual on setting up your messages in the Salesforce Marketing Cloud please refer to the Salesforce help for more information.

1. Login to your Salesforce account to access the web-based control panel



Note:
This section uses a specific example to show the areas that need to be setup in Salesforce, your setup will likely be different, please contact Salesforce support or the Salesforce help for additional information.

Note:
See the Salesforce Marketing Cloud for help with migrating your content to the new “Content Builder” or for help using the Content Builder to organize your images and folders.

Settings in Salesforce

To use the Content Builder you will need to ensure an API Package has been setup in the **Administration** > **Account** > **Installed Packages** area for each Profile (The Administration area is available from the top right under the logged in username):

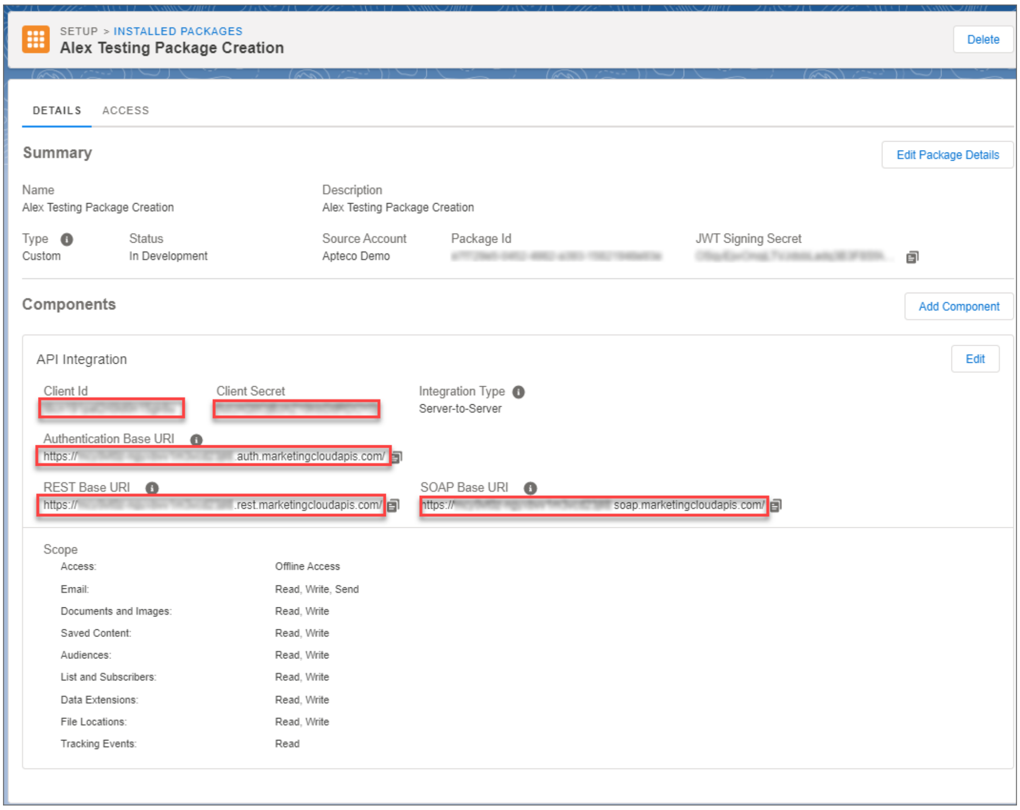
API Package Settings

During the setup make a note of the following

Table 8 –API Components

Field	Description
	*Example, these will be specific to each sender profile and are used in FasStats when configuring the Email Broadcasting Template
Business Unit	Optional
Account Id	e.g. *12345678 used as the FTP Username and forms the first part of the FTP URL
Client Id	e.g. *g2yTgel9ighz118ps6cWnq3j a 24-character alphanumeric string
Client Secret	e.g. *h8yygelSighz118ps6cWaquj a 24-character alphanumeric string
FTP Password	e.g. *6Da.fP.4L emailed during setup and forms the second part of the FTP URL
API Version	All new accounts with Salesforce will be on v2, you can check if your existing API Package is a Legacy API v1 from Setup – Apps > Installed Packages
Authentication Base URI	[*]https:// 0f4wbzr4nlfssl wi2u612psbpg7g.rest.marketingcloudapis.com/
Base URI	[*]https://0f4wbzr4nlfssl wi2u612psbpg7g.rest.marketingcloudapis.com/

Installed Packages page



Additional Settings

See the other areas in the Salesforce Marketing Cloud for additional settings

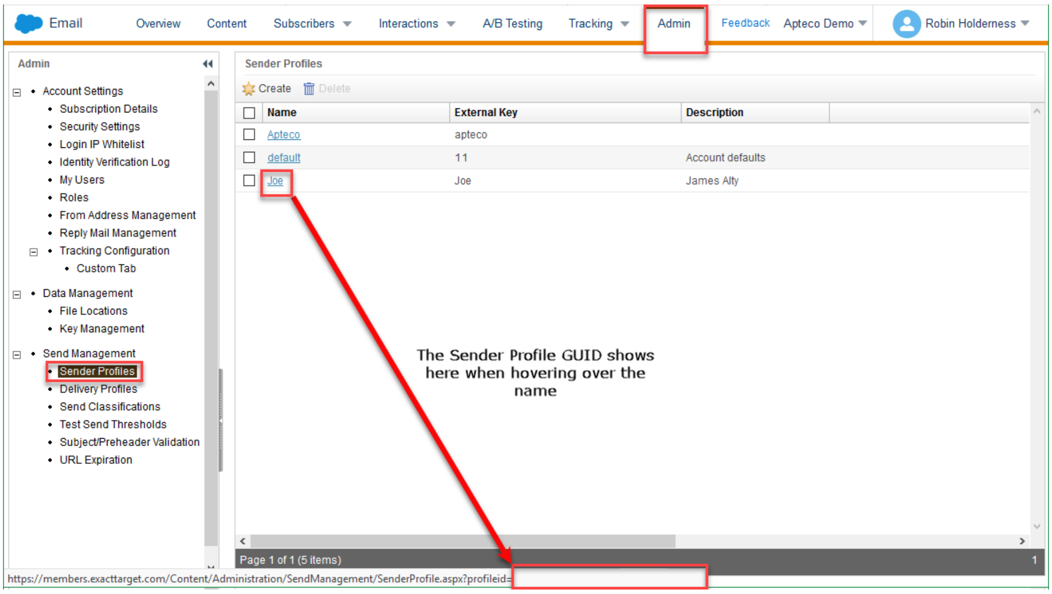
Table 9 –Other Settings

Field	Description
Sender Profile	GUID Hover over the name of the sender change to uppercase e.g. 24C54B21-3708-F123-A4E8-973AF123381B
File Transfer Location	From: Admin > File Locations
Send Classification	From: Admin > Send Classification

Sender Profile

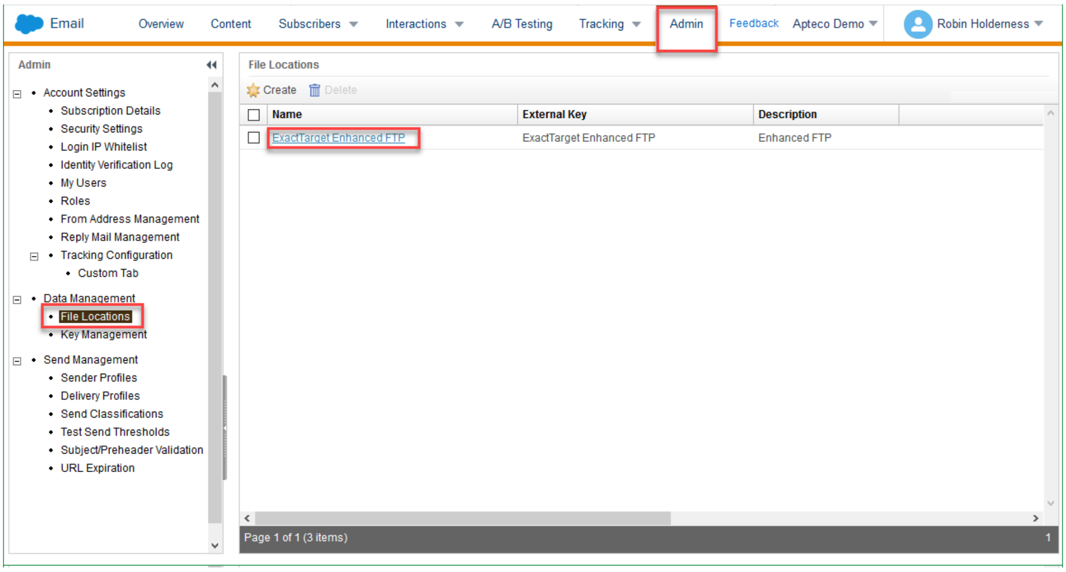
A GUID from the **Admin** menu sender Profiles (Note: This is a different area to Administration)

Hover over the name of the sender.



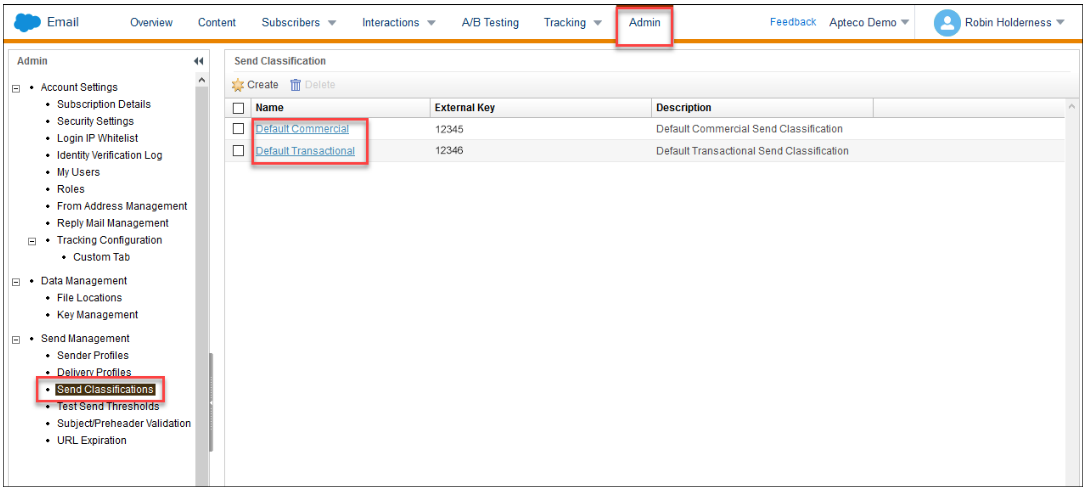
File Transfer Location

See the **Admin** menu **File Locations**



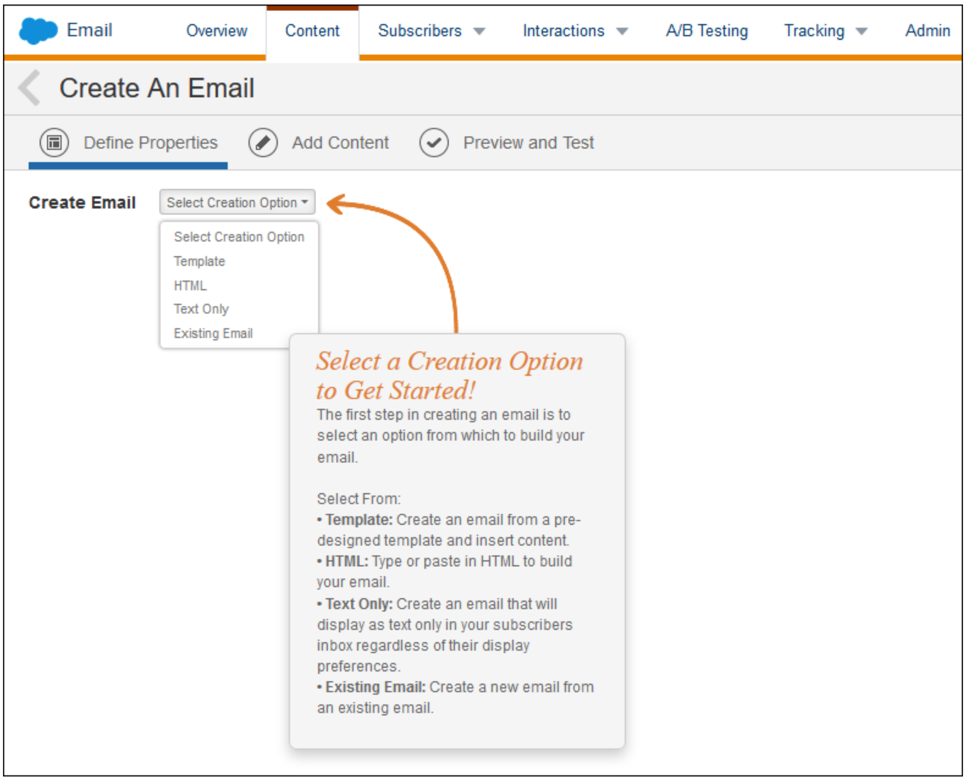
Send Classification

See the **Admin** menu **Send Classifications**

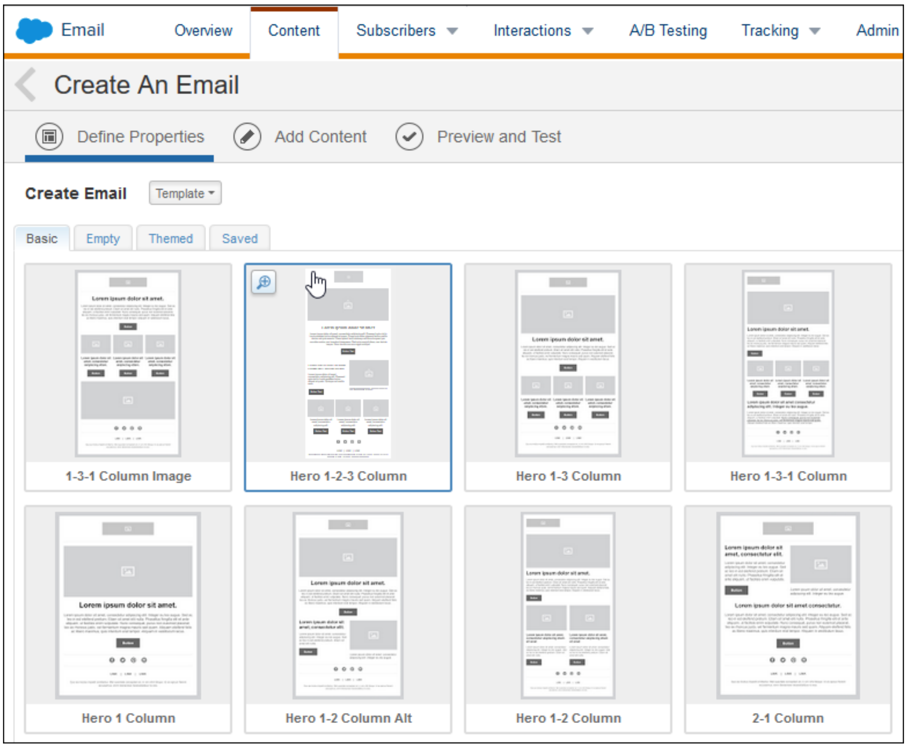


Set up Messages and Templates using Content Builder in Salesforce

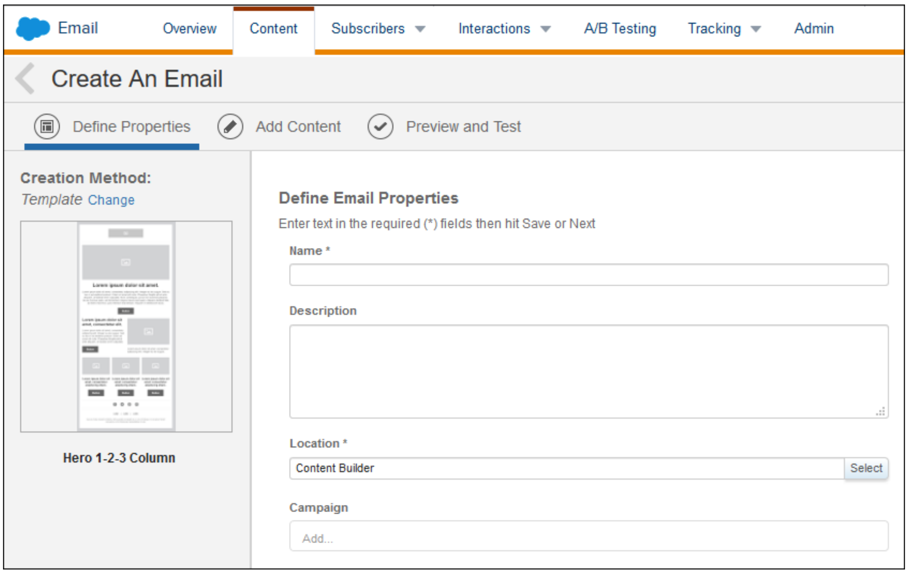
1. From: ***Content***



2. You can either create a Message or a Message Template.

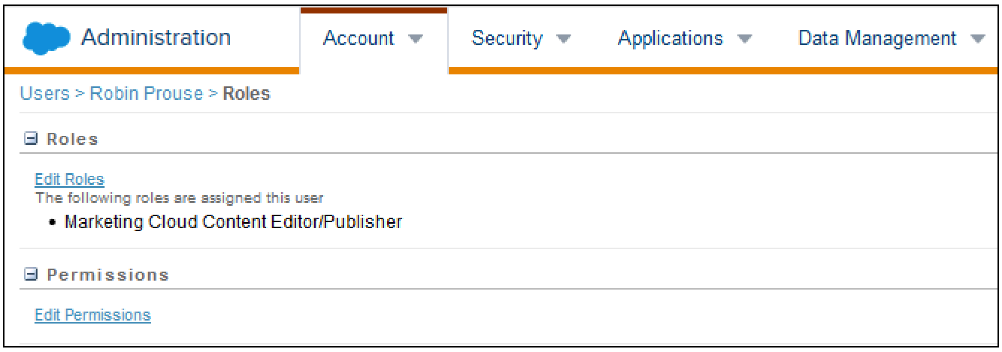


3. Using the wizards, you can define the static/dynamic content and the style of the emails.



Assigning Roles to FastStats Users in Salesforce

1. Log into Salesforce, Click the dropdown on the username on the right-hand side and choose Administration
2. From the Account menu choose Users
3. Put a tick next the user that is being used to authenticate
4. Click Manage Roles



5. Click Edit Roles

6. Ensure the following roles are assigned

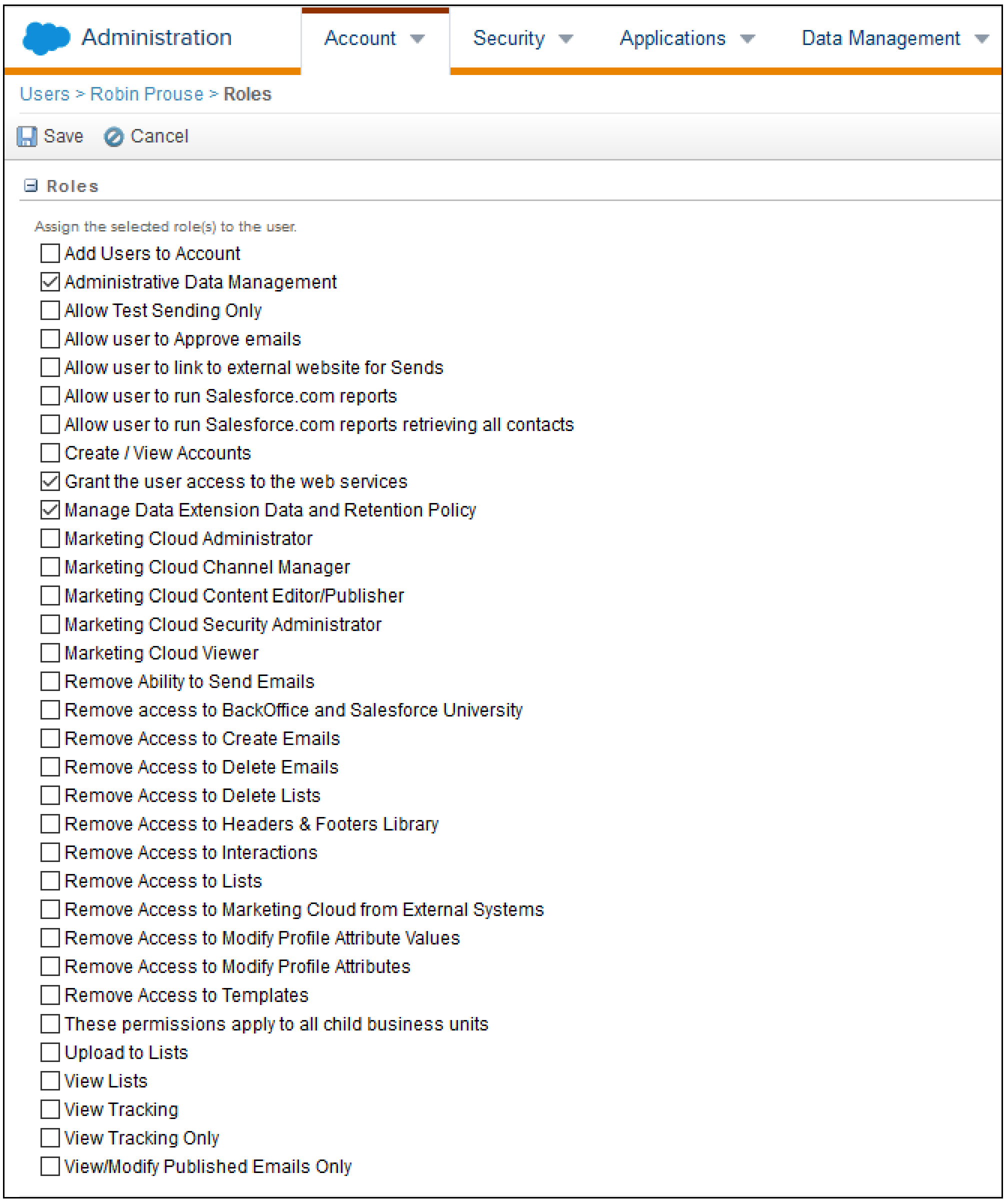


Table 10 – Broadcasting Roles

Required	Role
Y	Grant the user access to the web services
Y	Administrative Data Management
Y	Manage Data Extension Data and Retention Policy

Appendix B: API Parameters

Table 11 – Email Response Gatherer Parameters

Parameter	Required	Default	Description
FTPURL	Y		The ftp location (including username and password) where your Salesforce responses are generated

The following data is inserted into the FastStats Email Response Table as part of the configuration, you can optionally override the settings by adding them in the FastStats Email Response Configurator

	Required	Response Table field	Salesforce extract file column
PEMPRIVATEKEY	N		If secure ftp is used above and requires a private key, this should refer to the path and filename of that key
FILEPATTERN	N	Response*	Allows you to filter your responses to specific types when reading files from the ftp site
EMAILCOLUMNNAME	N	EmailAddress	Email address
URNCOLUMNNAME	N	Urn	FastStats Urn. Only be available if it has been previously uploaded from FastStats
COMMUNICATIONKEYCOLUMNNAME	N	CommunicationKey	FastStats Communication Key. Only be available if it has been previously uploaded from FastStats
MESSAGENAMECOLUMNNAME	N		The message name is not returned in the Salesforce extract file, but a reference is, this should typically be left as the default value
DELIVERYDATECOLUMNNAME	N	DeliveryDate	Delivery date
CLICKURLCOLUMNNAME	N	ClickUrl	The name of the URL that was clicked
CLICKDATECOLUMNNAME	N	ClickDate	Date the link was clicked
EVENTTRIGGEREDDATECOLUMNNAME	N	EventTriggeredDate	Date the response occurred
TYPE	N		This allows you to restrict thae data downloaded to a specific type of response: • Open • Bounce • Click
BATCHCOLUMNNAME	N	BatchID	
BESPOKEEXTRACTFILENAME	N		This needs to refer to the Extract Filename if downloading bespoke responses.
BESPOKEEXTRACTID	N		This needs to refer to the Extract Id if downloading bespoke responses.
BUSINESSUNITID			If you are using Business Units in your account, you can enter a specific id to retrieve responses for that Business Unit or enter a * to retrieve all responses across all units.
RESPONDSTARTDATE			A specific date and time from when you wish to retrieve responses from in the format you specify (using DATEFORMAT).
RESPONSEENDDATE			A specific date and time to when you wish to retrieve responses to in the format you specify (using DATEFORMAT).
RESPONSEPERIOD			If RESPONSESTARTDATE or RESPONSEENDDATE are not used, this can be used to specify a period in days (D) or months (M) from the current date.
SUBSCRIBERIDCOLUMNNAME		SubID	

Additional Configuration	Required	Default	Description
DATEFORMAT	N		Date format used e.g. dd.MM.yyyy HH:mm
DATEOFFSET	N	0	No Longer used, this parameter's function is preconfigured in the software using the SERVERTIMEZONE or LOCALTIMEZONE settings
LOCALTIMEZONE	N	Local	Specifes the time zone to store your dates in. This allows you to write responses in your current time zone.
SERVERTIMEZONE	N	GMT Standard Time	Specify the time zone that your broadcaster uses when returning data. This allows you to write responses in your current time zone. This value is pre configured for each broadcaster, options are Local, Central Standard Time, W. European Standard Time, UTC, GMT Standard Time, see the link below.
See: https://support.microsoft.com/en-gb/help/973627/microsoft-time-zone-index-values			
MAXRECORDSPERBATCH	N		Entering a numeric value will split the bulk insert of responses up into smaller batches. If this parameter is not set, all responses will be bulk inserted in one go.
READACCESSRETRIES	N	300	The number of times the Email Response Gatherer will check to see if the extract file is readable on the ftp site.
DELIMITER	N	Tab	Type of delimiter used in the extract file, options include: • COMMA (,) • DOUBLEQUOTE (") • NULL. • SEMI (;) • SPACE ( ) • SINGLEQUOTE (') • TAB
ENCLOSER	N	None	Allows you to specify a pipe (|) delimited list of the additional fields you wish to include in the Response Details table. This only acts as a filter, i.e. you can only specify fields that are included in the extract file.
LOOKUPBROADCASTIDSONTHEFLY	N	false	False will force the Email Response Gatherer to download a full list of Broadcast Ids from all the previous broadcasts in the response database. This can then be used to quickly match responses to broadcasts. If set to true, the Broadcast Ids will be fetched and cached as and when required
ONLYPROCESSRECORDSWITHBROADCASTID	N	false	Setting this to true will force the Email Response Gatherer to only download responses to messages that have originated from FastStats. The default option is false; all responses will be downloaded.
EXECUTIONBUFFER	N		Adds a buffer in minutes to the start of the response window. Use this to create an overlap to allow for delayed response notifications.
EXECUTIONTAG	N		When using Smart Execution, this can be used to identify separate accounts when using the same broadcaster.
FILETRANSFERLOCATION	N	ExactTarget FTP Export.	This should refer to the file location from your ExactTarget admin section.
TRACKINGEXTRACTFILENAME			This needs to refer to the Tracking Extract Filename as provided by ExactTarget (this is only required if you need to collect Communication Keys).
TRACKINGEXTRACTID			This needs to refer to the Tracking Extract Id as provided by ExactTarget (this is only required if you need to collect Communication Keys).

Parameter	Required Y/N	Default	Description
MESSAGESTARTDATE	N		A specific date and time from when you wish to retrieve message names for the lookup in the format you specify (using yyyy-MM-dd HH:mm:ss).
MESSAGEENDDATE	N		A specific date and time to when you wish to retrieve message names for the lookup in the format you specify (using yyyy-MM-dd HH:mm:ss).
MESSAGEEPERIOD	N		If MESSAGESTARTDATE or MESSAGEENDDATE are not used, this can be used to specify a period in days (D) or months (M) from the current date to retrieve message names for the lookup.
JOBIDCOLUMNNAME	N	JobID	.
QUERYALLACCOUNTS			The default value of true queries all accounts when retrieving message and list names. The information gathered is used to lookup the actual message and list names.
TREATMESSAGENAMEASADDITIONALFIELD		false	Setting this to true will force the raw response type to be written to the ReponseDetails table, before any conversion is carried out.
TREATTYPEASADDITIONALFIELD		false	Setting this to true will force the raw response type to be written to the ReponseDetails table, before any conversion is carried out.
TYPECOLUMNNAME			TREATMESSAGENAMEASADDITIONALFIELD
URL		https://webservice.exacttarget.com/52ervice.asmx.	This should refer to the web service on the server your ExactTarget account is hosted on.

Table 12 – Email Broadcasting Parameters

Parameter	Required Y/N	Default	Description
FTPURL	Y		e.g. ftp1.exacttarget.com Note: This may be a different URL depending on which salesforce WDSL service used
API Version	Y		All new accounts with Salesforce will be on v2, you can check if your existing API Package is a Legacy API v1 from Setup – Apps > Installed Packages
Authentication Base URI	(Y v2)		[*]https:// 0f4wbzr4nlfssl wi2u612psbpg7g.rest.marketingcloudapis.com/
Base URI	(Y v2)		[*]https://0f4wbzr4nlfssl wi2u612psbpg7g.rest.marketingcloudapis.com/
Send Classification	Y		e.g. Default Commercial
FTP Username	Y		Obtain this from Salesforce
FTP Password	Y		Obtain this from Salesforce
URL (API URL)		https://webservice.exacttarget.com/Service.asmx.	https://developer.salesforce.com/docs/atlas.en-us.mc-apis.meta/mc-apis/your-subdomain-tenant-specific-endpoints.htm
*Client ID	Y		Available from Salesforce - Administration > Account > Installed Packages
*Client Secret	Y		Available from Salesforce - Administration > Account > Installed Packages
Email Content	Y		Classic Builder, Content Builder or Both, Set to match the builder used in Salesforce to create the Message
Sender Profile	Y	e.g. 24C54B21-3708-F123-A4E8-973AF123381B	A GUID obtained from the Marketing Cloud **Admin** > **Sender Profiles** Mouse over the Sender Profile Initials to see the globally unique identifier (GUID) at the bottom of the window, **change to uppercase**
Use Urn as Subscriber Key	Y	true	
FTP Protocol	Y	FTP	
Subscriber Key Name	Y	Subscriber Key	
File Transfer Location	Y	ExactTarget Enhanced FTP	We recommend you use ExactTarget Enhanced FTP
Upload and Broadcast Folder	Y	e.g. Root\%LISTNAME%\%MESSAGENAME%	These can be absolute paths to the Data Extensions folder, or you can use the following parameters
Upload Only Folder	Y		
UploadEmptyLists	N	true	Set this to false if you wish to prevent empty list being uploaded to Salesforce
UseDatedList	N	true	Setting this to false will remove the date and time stamp at the end of the file name

DatedListFormat	N	yyyMMdd-HHmmss	The date format string for the date and time stamp if created
MaxWaitTime	N	7200 (120 minutes)	The maximum time to wait for a list to be imported in seconds
Encoding	N	UTF8	Enter the encoding of the incoming file
EscapeQuotes	N	False	Set this to true to escape quote characters

Appendix C:Example Batch File

Example batch file to use with FERG and scheduling

```
@echo off

REM**************************************************************************

REM File Name: SalesforceBatchFile.bat

REM Date: 30/01/2018

REM ToDo:

REM Define the drive and folders to output the log files

REM Set FERG to define the location of the EmailResponseGatherer64.exe

REM Set LOGFILE to the folder where the event logs are stored

REM Set LOGFILEDETAILS to the folder where detail logs are stored

REM Define the XML configuration file to use

REM *************************************************************************

D:

cd D:\FastStats\FERG

cls

SET FERG="%ProgramFiles%\Apteco\FastStats Email Response Gatherer x64\EmailResponseGatherer64.exe"

SET LOGFILE="Logs\Salesforce.txt"

SET LOGFILEDETAILS="Logs\Salesforce_Details.txt"

echo. >> %LOGFILE%

echo. >> %LOGFILEDETAILS%

echo %date% %time% - Starting FastStats Salesforce Response Download >> %LOGFILE%

echo %date% %time% - Starting FastStats Salesforce Response Download >> %LOGFILEDETAILS%

echo. >> %LOGFILE%

>> %LOGFILEDETAILS%

echo.

%FERG% Salesforce.xml >> %LOGFILEDETAILS%


IF ERRORLEVEL 9003 goto FailedException

IF ERRORLEVEL 9002 goto FailedLogout

IF ERRORLEVEL 9001 goto FailedDownload

IF ERRORLEVEL 9000 goto FailedLogin


:OK
```

```
echo %date% %time% - FastStats Gathered Salesforce Responses OK >> %LOGFILE%

goto Complete


:FailedLogin

echo %date% %time% - FastStats Gatherer Failed - Login Failed to Salesforce >> %LOGFILE%

goto Complete


:FailedDownload

echo %date% %time% - FastStats Gatherer Failed - Downloading from Salesforce >> %LOGFILE%

goto Complete


:FailedLogout

echo %date% %time% - FastStats Gatherer Failed - Logging out of Salesforce >> %LOGFILE%

goto Complete


:FailedException

echo %date% %time% - FastStats Gatherer Failed - Salesforce API Exception >> %LOGFILE%

goto Complete


:Complete

echo %date% %time% - Completed FastStats Salesforce Response Download >> %LOGFILE%
```

End of example text

To see how to use the batch file see section 3.4 Scheduling the Response Gatherer

Appendix D:Troubleshooting

The following are some common problems that may occur, and procedures for resolving them.

Errors relating to configuring and using FERG

These errors can occur due to missing files

Description: Error received when running FERG using a batch file

Error: `Could not read email response configuration file: Could not find file 'D:\FastStats\FERG\Salesforce.xml'.`

Elaine.xml refers to the filename referenced in this section of the batch file:

%FERG% Salesforce.xml >> %LOGFILEDETAILS%

In the location:

“cd D:\FastStats\FERG” in the batch file

Solution: Ensure the file exists or change the filename in the batch file to match.

For customer service and technical support visit:

www.apteco.com/support

T: +44 (0)1926 407 595 (Support Desk)

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