



Apteco

DRAFT

Technical guide

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

Episerver Integration Guide
D061T3X003 – January 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 D061T3X003 - January 2020

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Note:

This is a draft copy as we are finalising how to configure the FastSats settings to broadcast using FastStats, the PeopleStage settings are correct.

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1 Introduction

This integration guide details the processes required to integrate the Apteco Marketing Suite with the Episerver 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 Episerver. Use of the Apteco Marketing Suite in combination with Episerver 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 Episerver functionality

Technology

Episerver integrates with your FastStats system by utilising a RESTful transport over HTTP/S, in conjunction with SFTP.

Supported Integrations

Episerver supports all the above integration options.

Type of Integration - Predefined

Episerver is a Predefined integration meaning the output is defined by an administrator and will be structured to match the required field layout of the Digital Integrator's subscriber database. Typically, this type of list will contain standard and transactional data.

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 Episerver. You will also need to understand how to construct your message in Episerver.

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 Episerver
 - b. API Parameters

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

Useful to have before you start:

- **Database Connection String** made up of the database server Instance name and FastStats system name, for example:
 - `<SQLServerInstanceName>;Initial Catalog=RS_<SystemName>;User Id=faststats_service;Password=fa5t5tat5;`
- The **Digital Integration.zip** available from:
<https://www.apteco.com/portal/software-releases>
- Decide where your **FERG folders** are to be created
 - Used to store the .xml and .bat files used when scheduling FERG
 - Bulk insert folder must be accessible from SQL Server to use BULK INSERT
- Decide where you want the FastStats Email Response Gatherer to be installed
 - This will typically be on the same PC as the FERG folders but can be on any PC
- Virtual Variables in FastStats to map to broadcast fields, see pages 25 and 39
- The Episerver UI URL Username, Password and PIN
- The Episerver List Name and Message Name (available from the Episerver UI)
- The Episerver API Username and Password
- The Episerver Client ID

Note:

You will need to configure an Episerver Smart Campaign and a Message, the Mailings Classic has been deprecated, see Episerver's help on migrating a Classic mailing. See Appendix A for Episerver configuration notes.

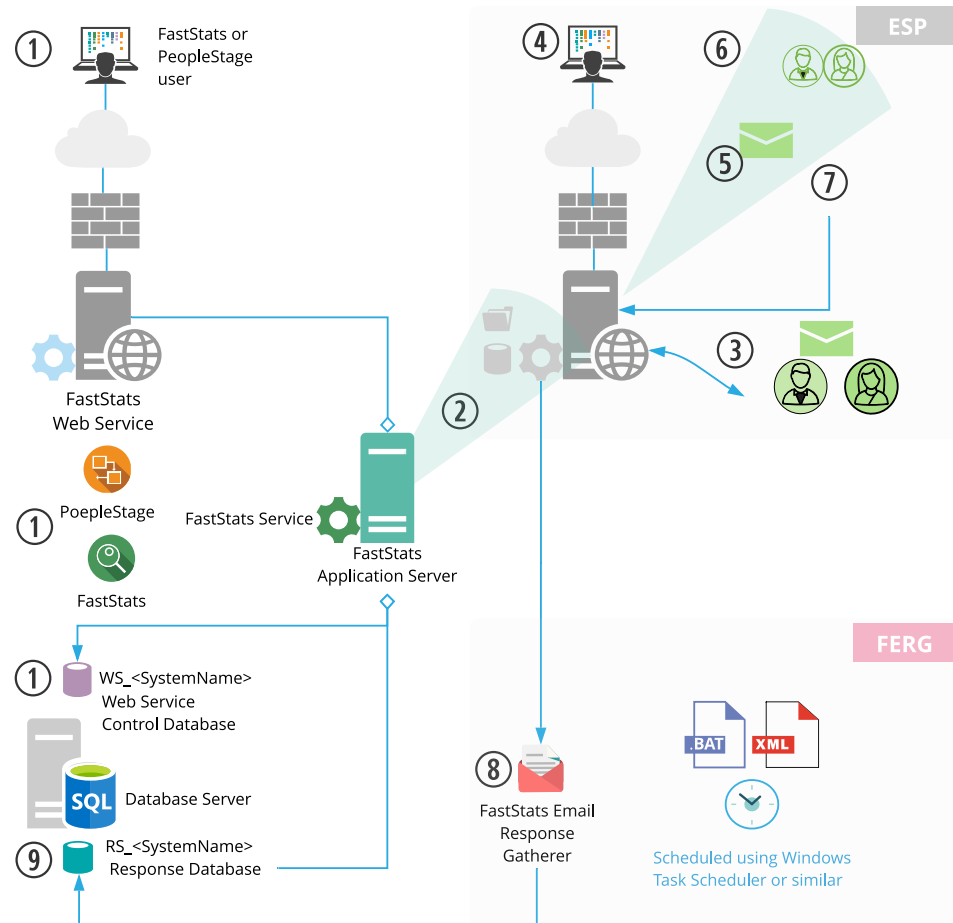
<http://webhelp.episerver.com/latest/en/home.htm>

2 Process Summary

2.1 Architecture

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

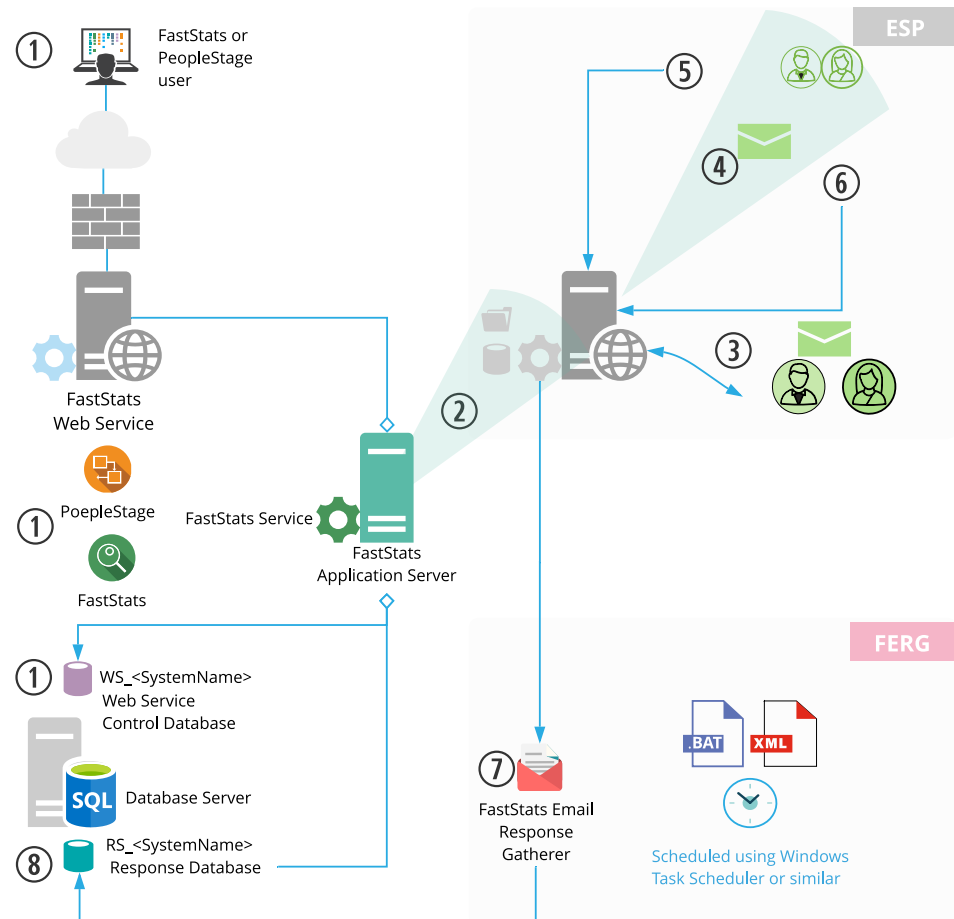
Schematic showing campaign scheduling performed in Episerver.



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 Episerver SFTP site and then uses RESTful communication to monitor the upload.
3. Episerver 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 Episerver web interface.
5. Episerver sends Messages to all recipients on the list.
6. Episerver records any undelivered messages.
7. Episerver 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 Episerver 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 Episerver.

3 Apteco System Configuration

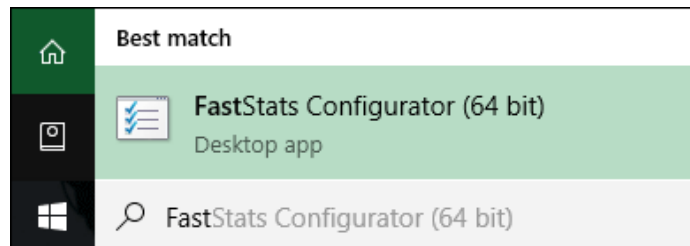
3.1 Creating the Response Database

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

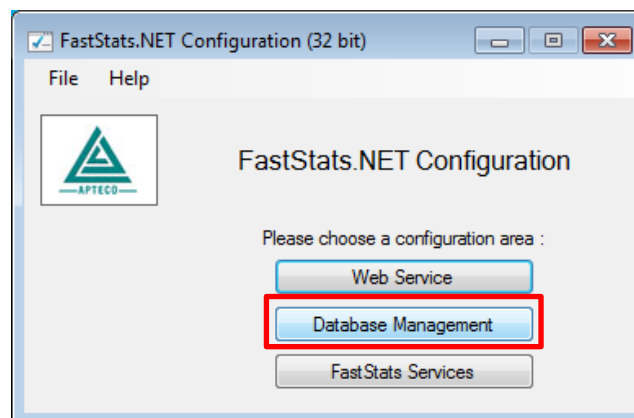
1. Open the FastStats Configurator.

Tip:

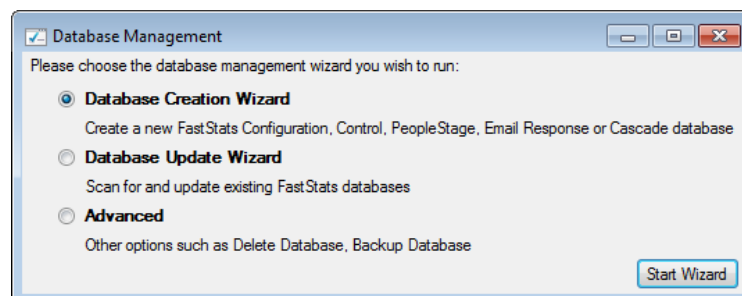
Search for Fast in the Start Menu



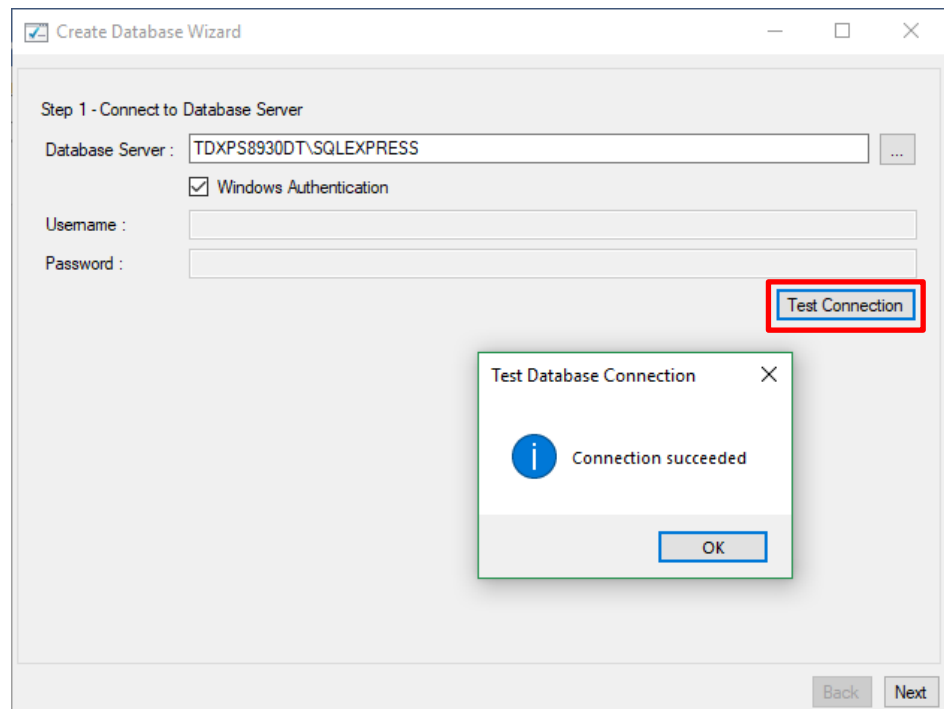
2. Select **Database Management**.



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

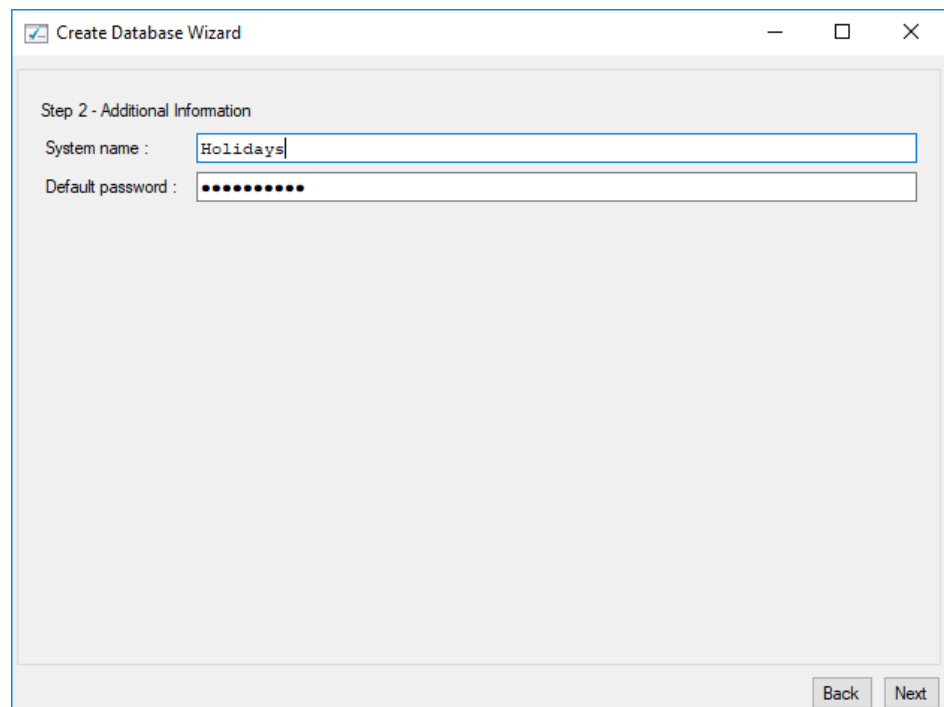


4. Enter the name of the **Database Server** where you wish to store the response database, click **Test Connection**

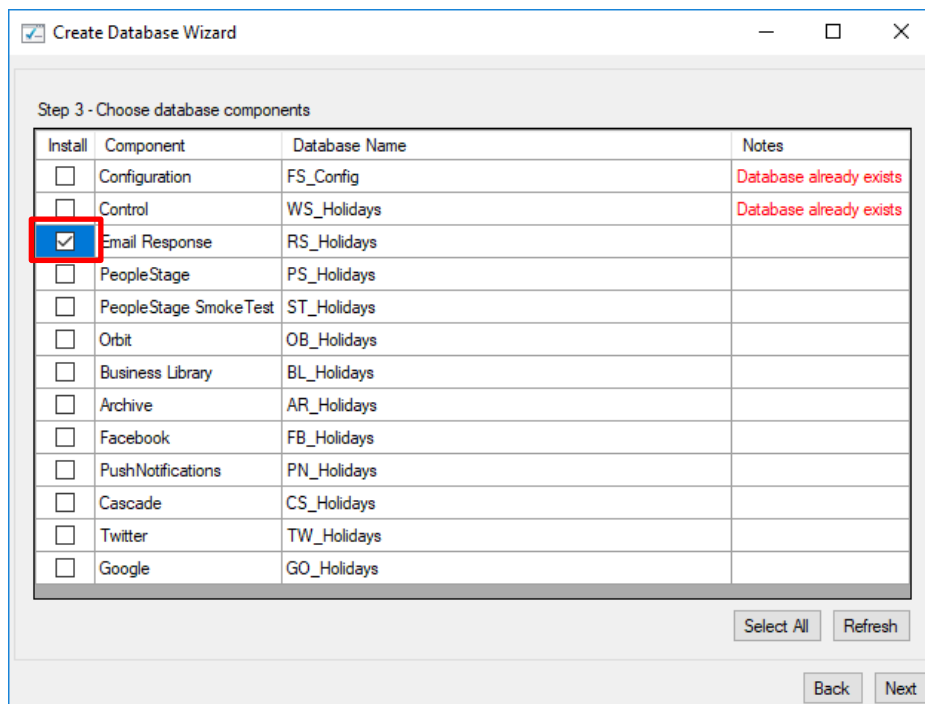
**Note:**

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**.



Step 3 - Choose database components

Install	Component	Database Name	Notes
☐	Configuration	FS_Config	Database already exists
☐	Control	WS_Holidays	Database already exists
☒	Email Response	RS_Holidays	
☐	PeopleStage	PS_Holidays	
☐	PeopleStage SmokeTest	ST_Holidays	
☐	Orbit	OB_Holidays	
☐	Business Library	BL_Holidays	
☐	Archive	AR_Holidays	
☐	Facebook	FB_Holidays	
☐	PushNotifications	PN_Holidays	
☐	Cascade	CS_Holidays	
☐	Twitter	TW_Holidays	
☐	Google	GO_Holidays	

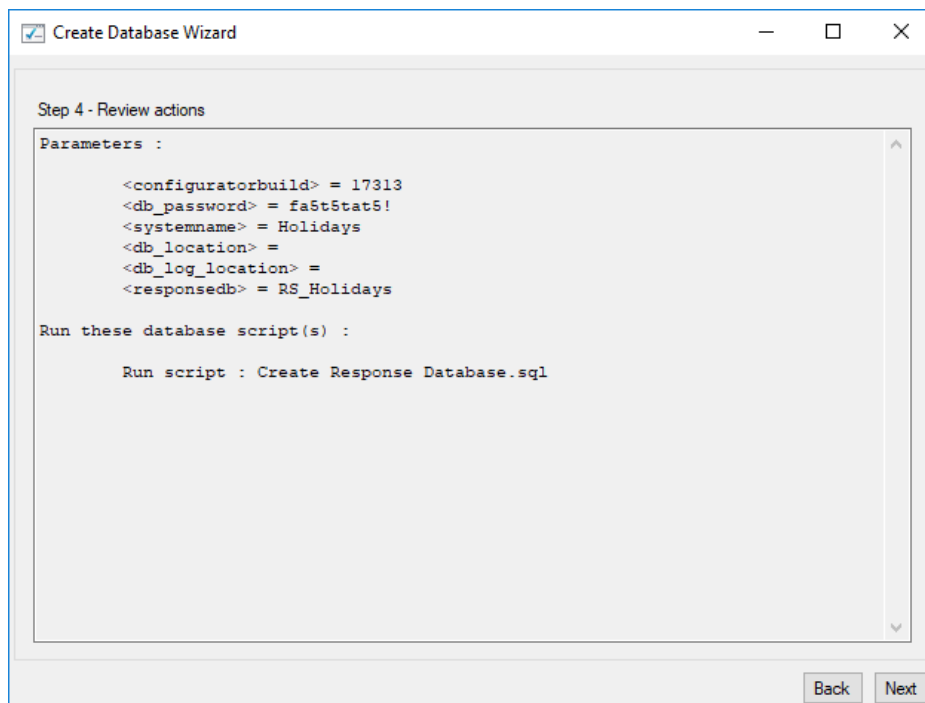
Select All Refresh

Back 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.



Step 4 - Review actions

Parameters :

```

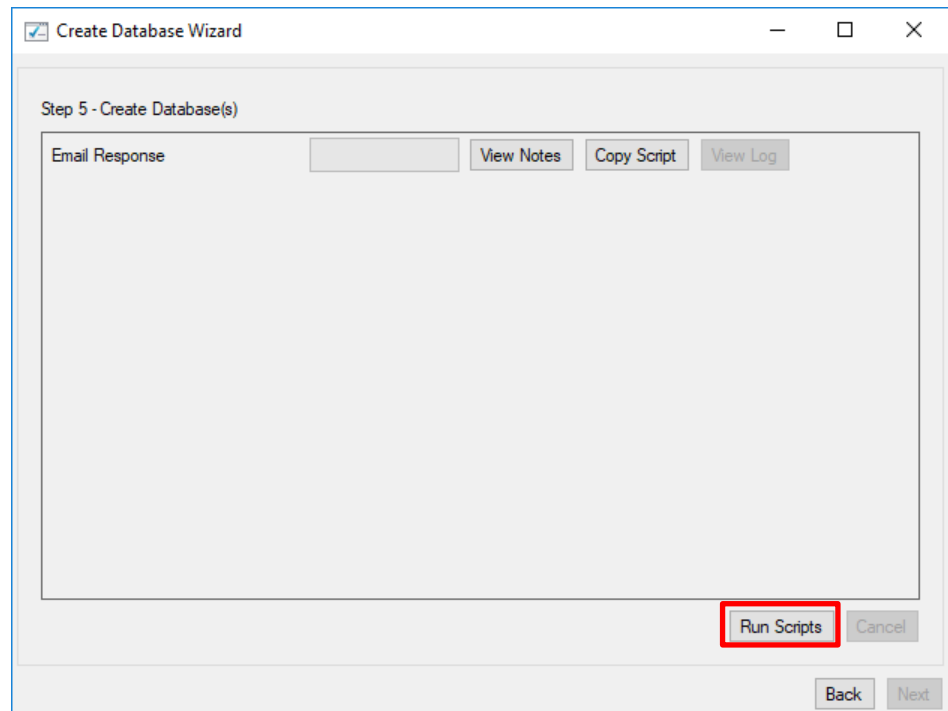
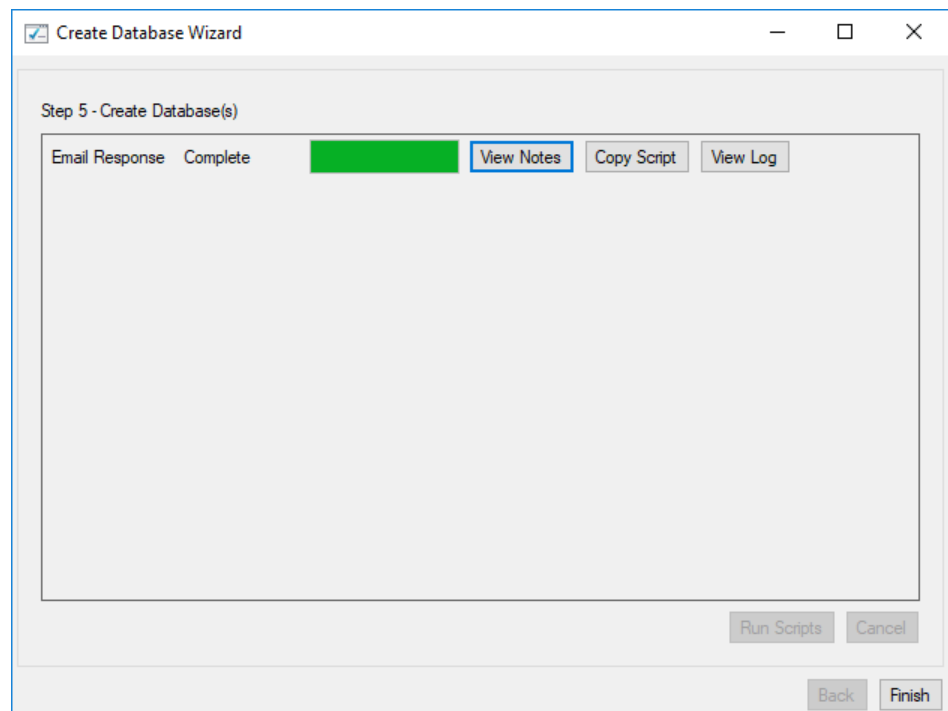
<configuratorbuild> = 17313
<db_password> = fa5t5tat5!
<systemname> = Holidays
<db_location> =
<db_log_location> =
<respondedb> = RS_Holidays
  
```

Run these database script(s) :

```

Run script : Create Response Database.sql
  
```

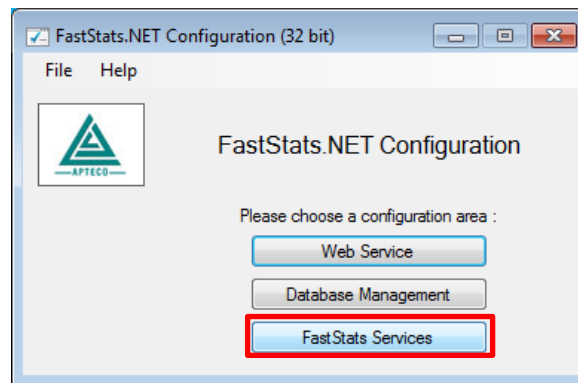
Back Next

8. Click **Run Scripts**.9. Click **Finish**.

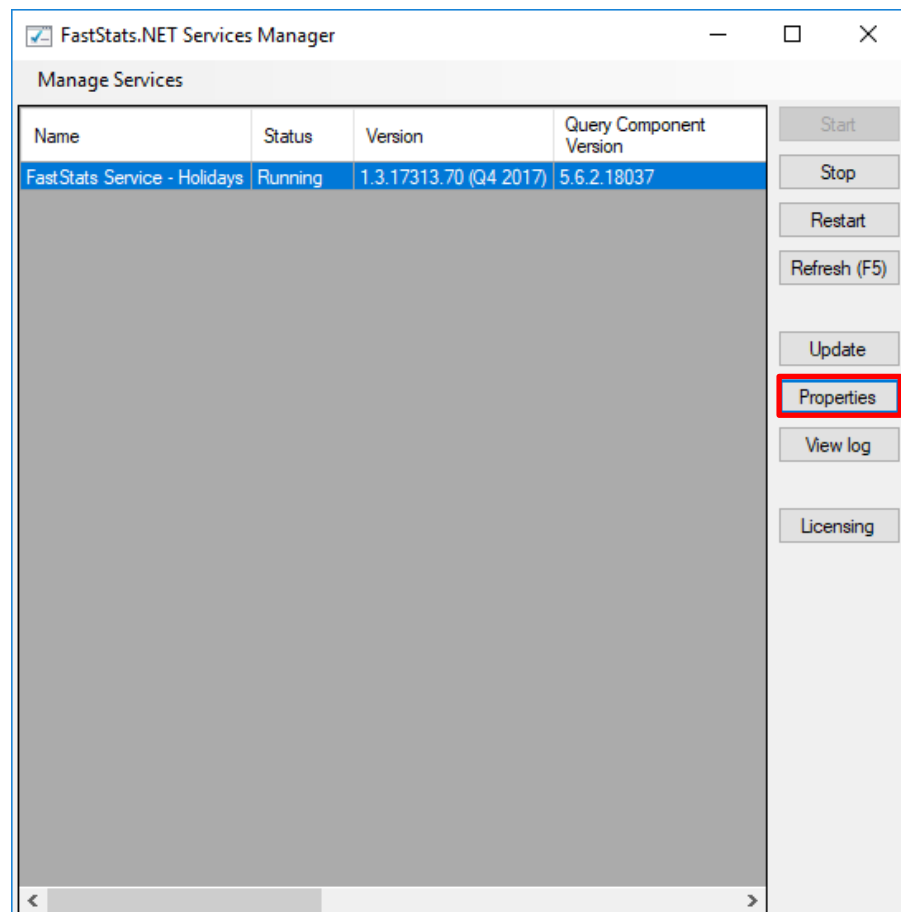
3.2 Linking the Response Database to the FastStats Service

You need link the response database to the FastStats service.

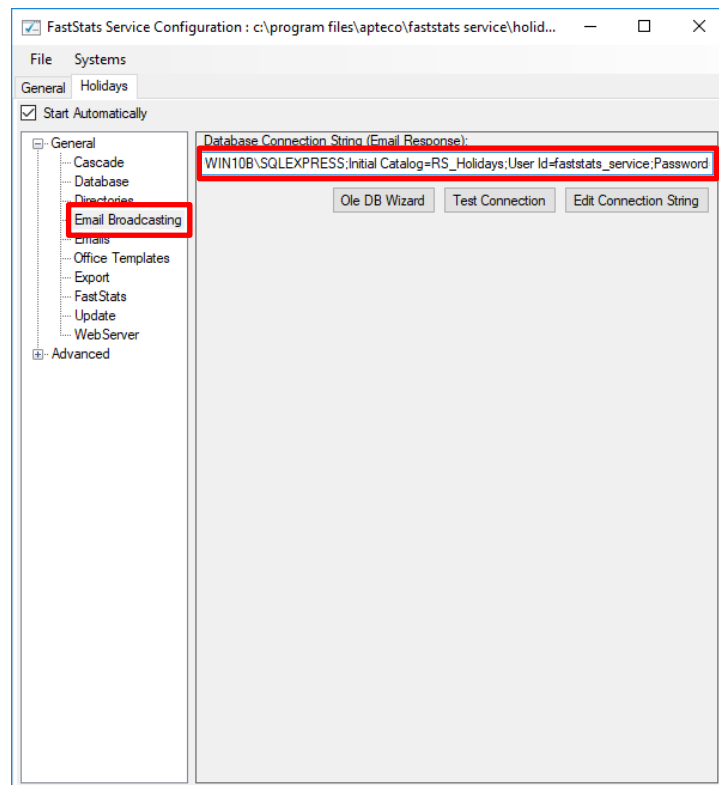
1. Open the **FastStats Configurator**
2. Select **FastStats Services**



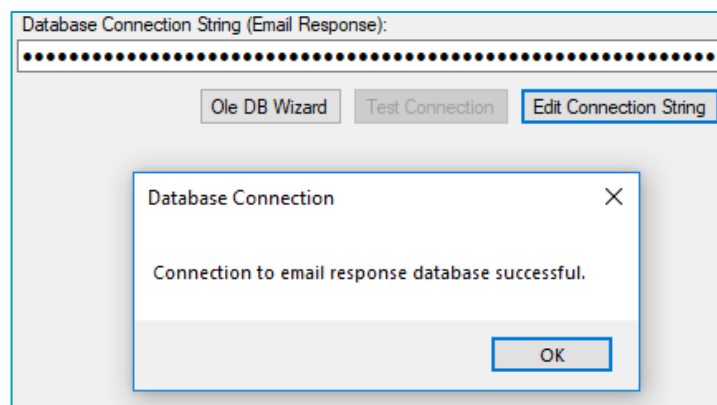
3. Select the **FastStats Service** for the system to link to the response database, click **Properties**



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, Episerver 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:

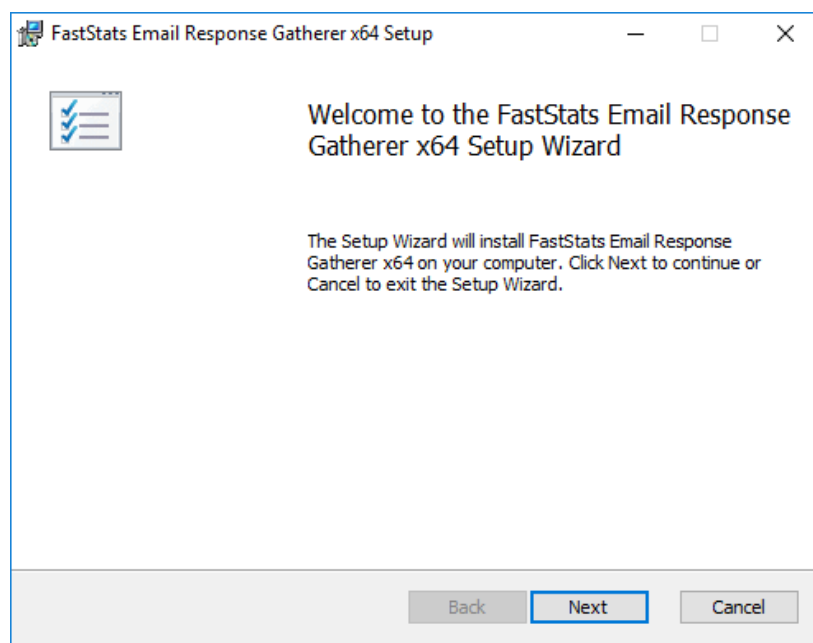
<https://www.apteco.com/portal/software-releases>

Note:

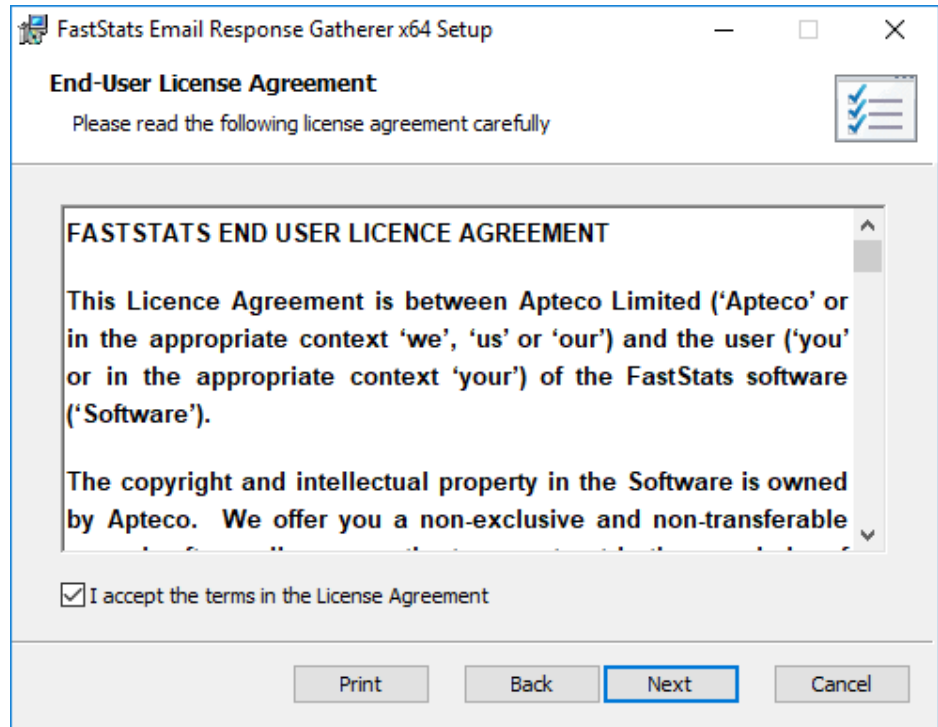
The FastStats Email Response Gatherer application can run on any PC in your system.

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

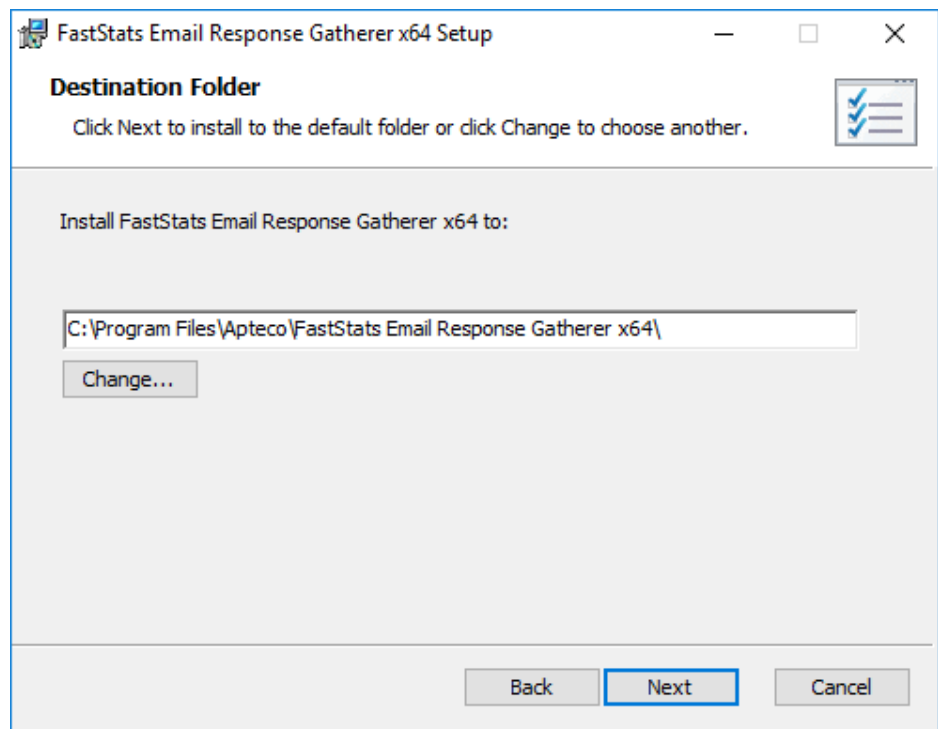
1. Click **Next**.



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

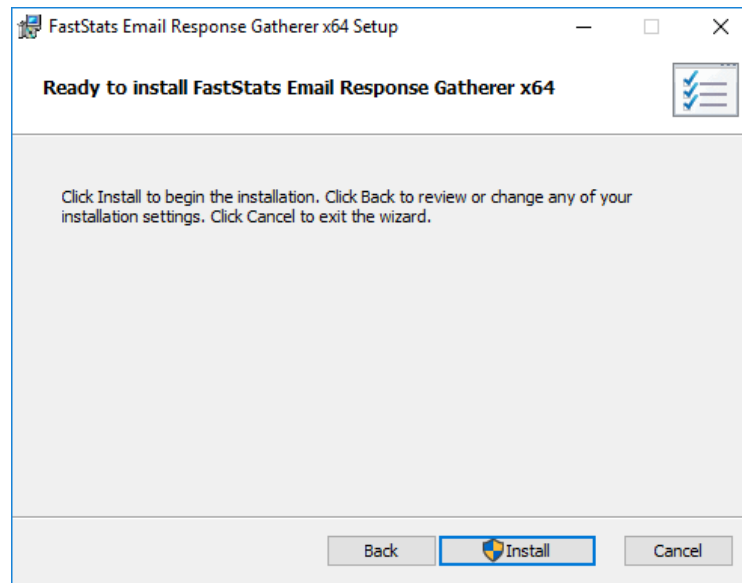


3. Click **Change** if you wish to install the Email Response Gatherer application in a different location then click **Next**

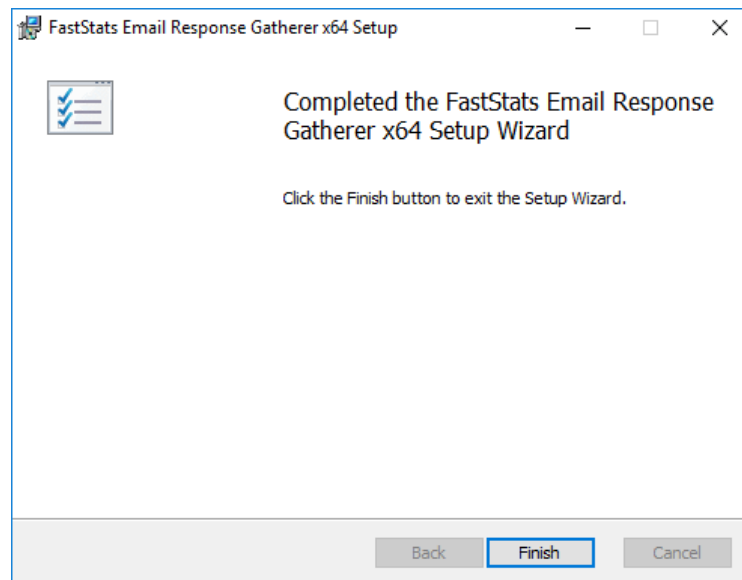
**Note:**

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

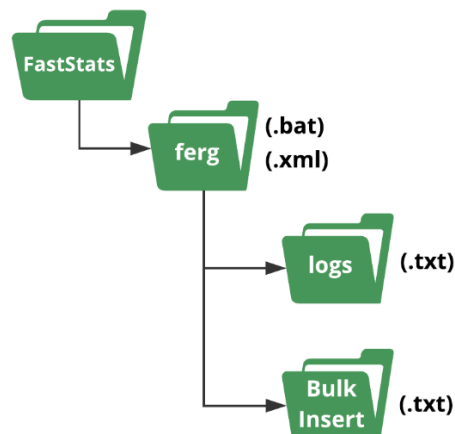
You will need to create folders to store the files to use with the Response Gatherer; these will include the following types of files.

Table 1 – 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 **Optivo** from the Broadcaster drop-down list, (the name
3. Enter the **Username** and **Password** to use with the Episerver API
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

FastStats Email Response Gatherer

File Help

Database

Connection string : Data Source=TDXPS8930DT\SQLExpress;Initial Catalog=RS_ Edit

Timeout (secs) : 0 Test

Bulk insert folder : \\ServerName\FastStats\FERG\BulkInsert Browse

☒ Send Email on Error SMTP Properties

PeopleStage connection string : Edit

Email Broadcaster

Broadcaster : Optivo

Username : username

Password : password

Broadcast Parameters

Add

Parameter	Value
*	

Missing required parameter(s) :

Note:

Episerver is a Predefined Broadcaster, the only required parameter is the FTPURL, you can use the other fields if you need to customize the collection.

Table 2 – 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 Episerver

Email Response Config dialogue with ADDITIONAL FIELDS completed

☒ FastStats Email Response Gatherer

File Help

Database

Connection string : Data Source=TDXPS8930DT\SQLExpress;Initial Catalog=RS_ Edit

Timeout (secs) : 0 Test

Bulk insert folder : \\ServerName\FastStats\FERG\BulkInsert Browse

☒ Send Email on Error SMTP Properties

PeopleStage connection string : Edit

Email Broadcaster

Broadcaster : Optivo

Username : username

Password : password

Broadcast Parameters

Add

Parameter	Value
MESSAGEPERIOD	n[D/M/Y]
CLIENTID	ClientId
CLICK.MAILINGID	n
CLICK.URN	n
CLICK.LINKID	n
CLICK.CREATED	n
CLICK.COMMUNICATIONKEY	n
CLICK.EMAIL	n
EXECUTIONBUFFER	0

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.

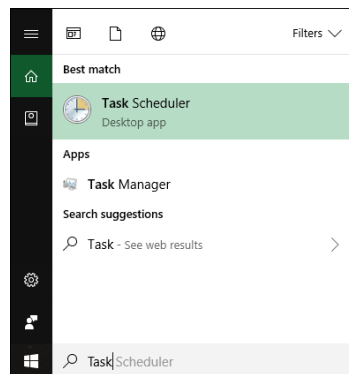
Using Task Scheduler

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

1. Open Windows **Task Scheduler**

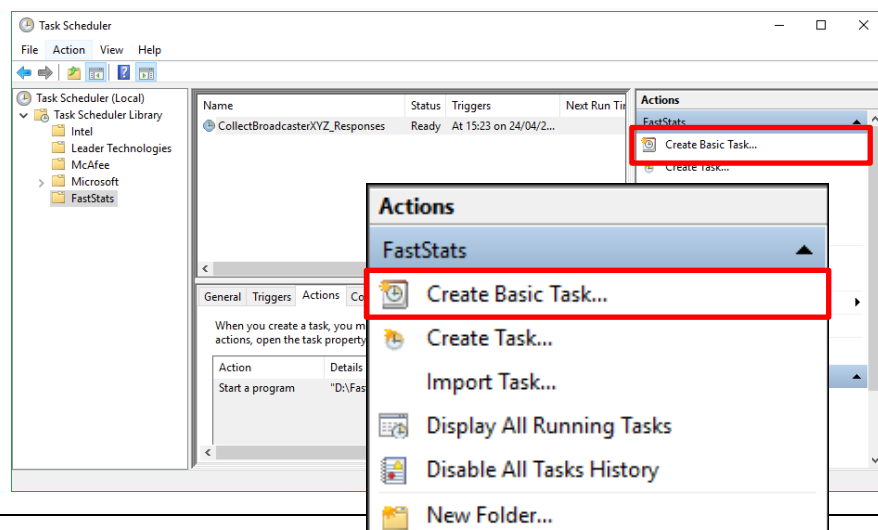
Tip

Search for **Task** in the Start Menu



The Windows Task Scheduler opens

2. Select **Create Basic Task**

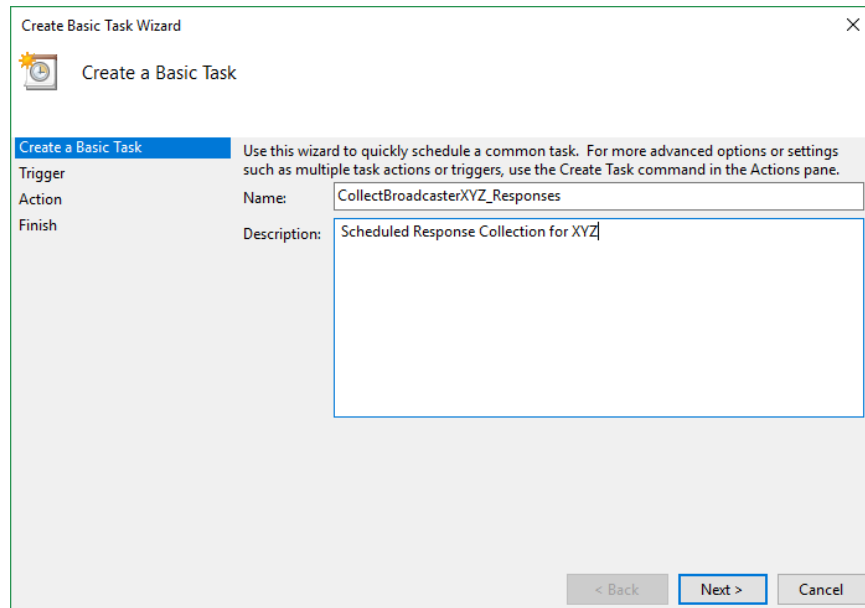


Tip:

You can create folders to organise your tasks

3. Create a Basic Task step

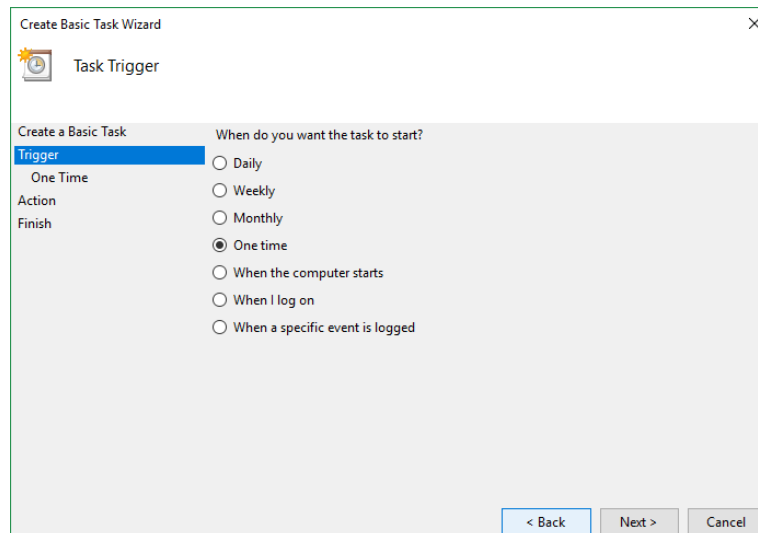
a. Give your task a **Name** and **Description**



The screenshot shows the 'Create Basic Task Wizard' dialog box, specifically the 'Create a Basic Task' step. The wizard has a sidebar with 'Create a Basic Task', 'Trigger', 'Action', and 'Finish'. The main area contains a 'Name' field with the text 'CollectBroadcasterXYZ_Responses' and a 'Description' text area with the text 'Scheduled Response Collection for XYZ'. At the bottom right are buttons for '< Back', 'Next >', and 'Cancel'.

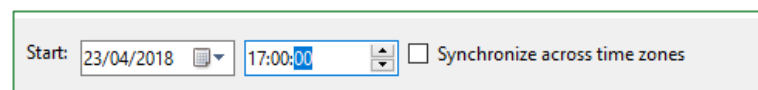
4. Task Trigger step

a. Select the **Trigger** interval



The screenshot shows the 'Create Basic Task Wizard' dialog box, specifically the 'Task Trigger' step. The sidebar has 'Create a Basic Task', 'Trigger' (selected), 'Action', and 'Finish'. The main area is titled 'When do you want the task to start?' and contains several radio button options: 'Daily', 'Weekly', 'Monthly', 'One time' (selected), 'When the computer starts', 'When I log on', and 'When a specific event is logged'. At the bottom right are buttons for '< Back', 'Next >', and 'Cancel'.

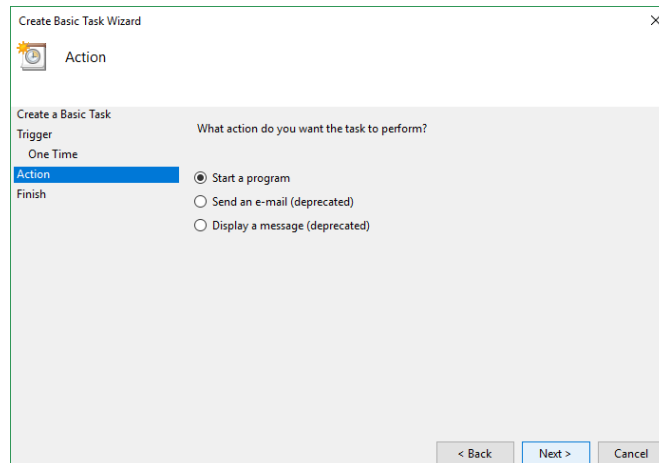
b. Enter the Start Date and Time or relevant sub-step details



The screenshot shows the 'Start' input fields. It includes a date field with '23/04/2018', a time field with '17:00:00', and a checkbox labeled 'Synchronize across time zones' which is currently unchecked.

5. Action step

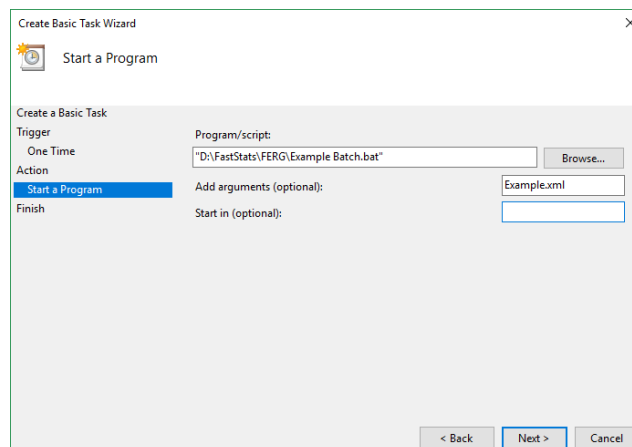
a. Select **Start a program** and click **Next**



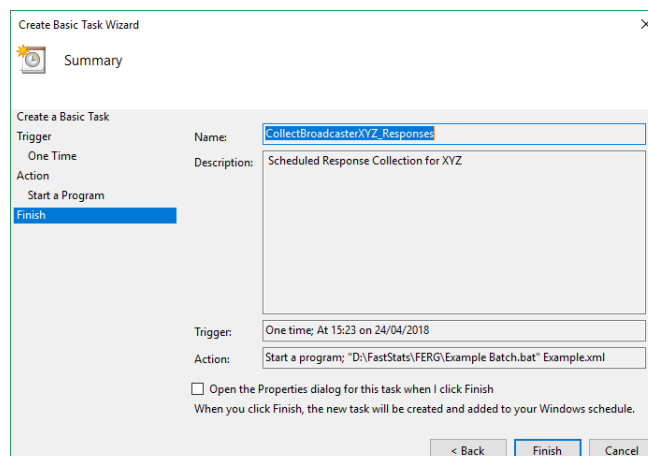
6. Start a Program Step

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

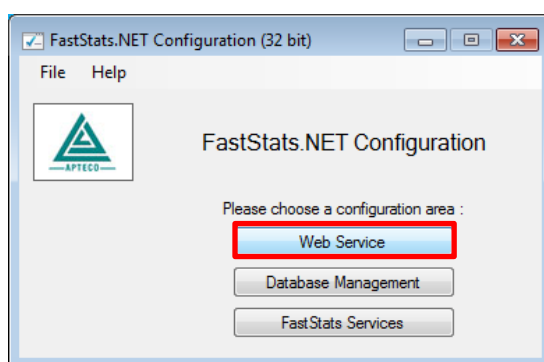
You must log in as an administrator to perform the following task.

The Email Broadcasting Wizard is required for FastStats use only.

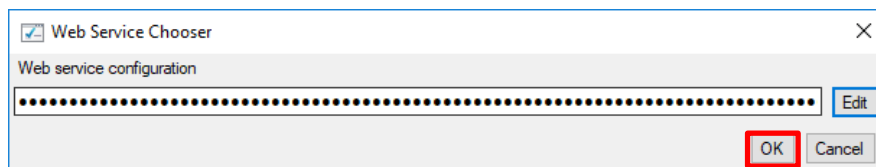
4.1 Enable Email Broadcasting

You must enable the Email Broadcasting wizard plugin.

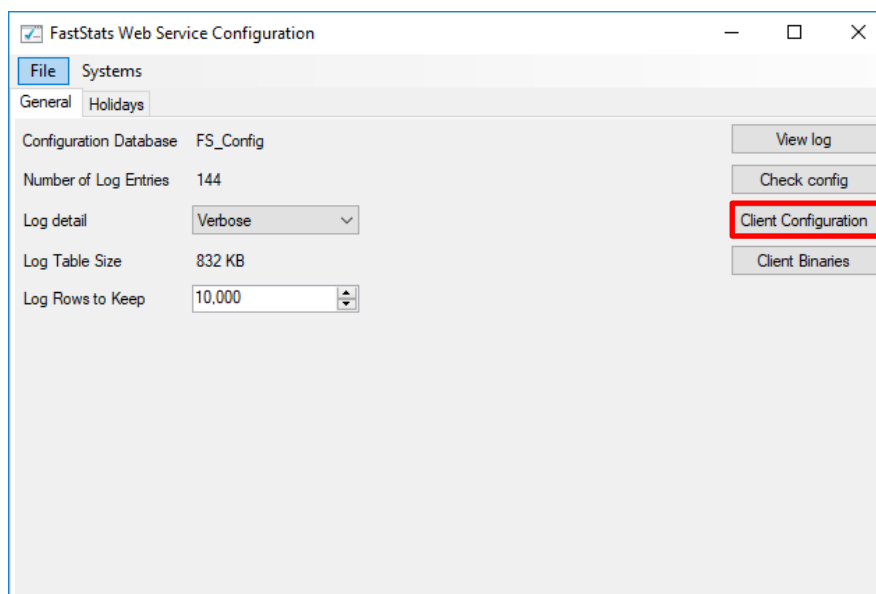
1. Open the **FastStats Configurator**
2. Select **Web Service**



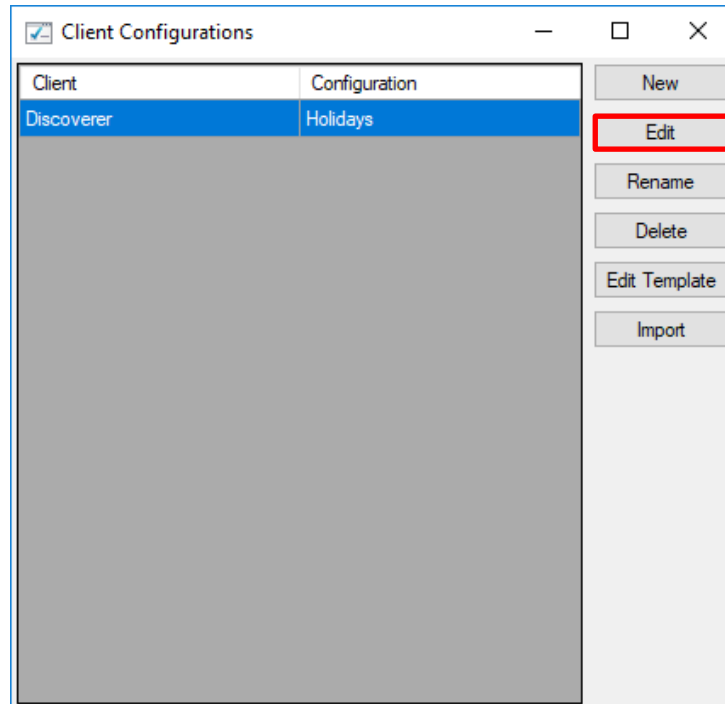
3. Click **OK** on the Web Service Chooser dialogue box



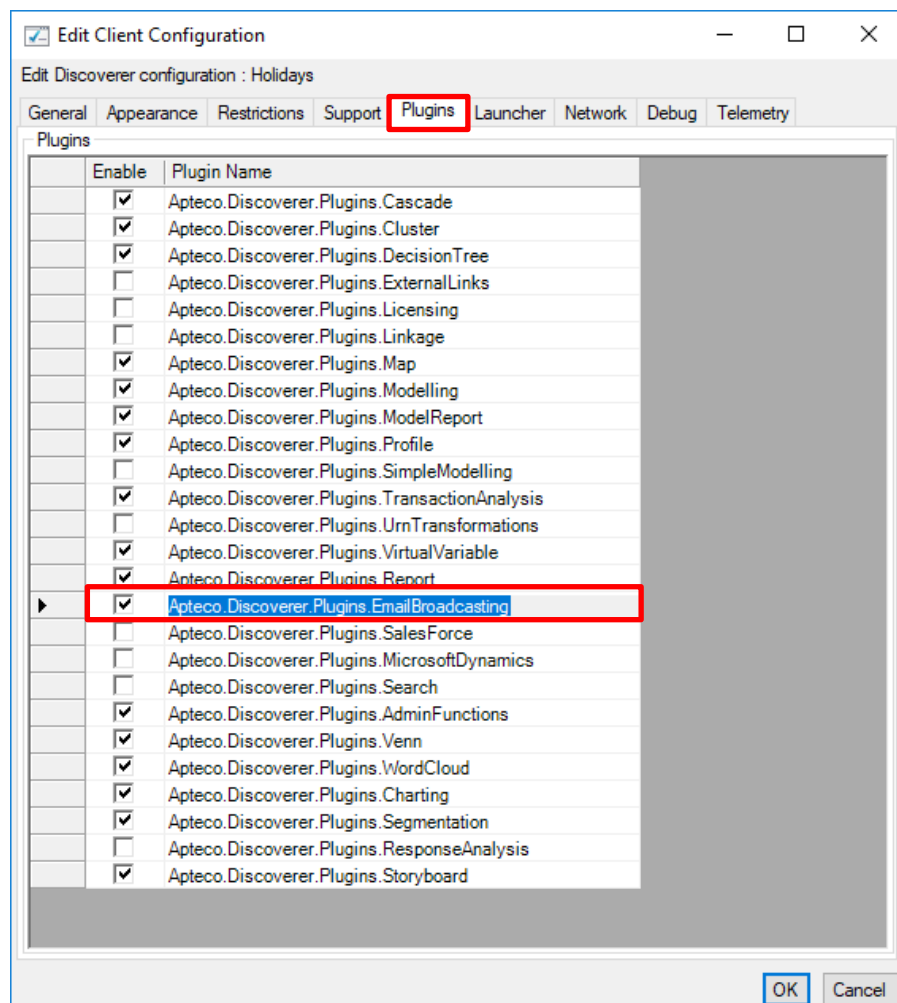
4. Click **Client Configuration**



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

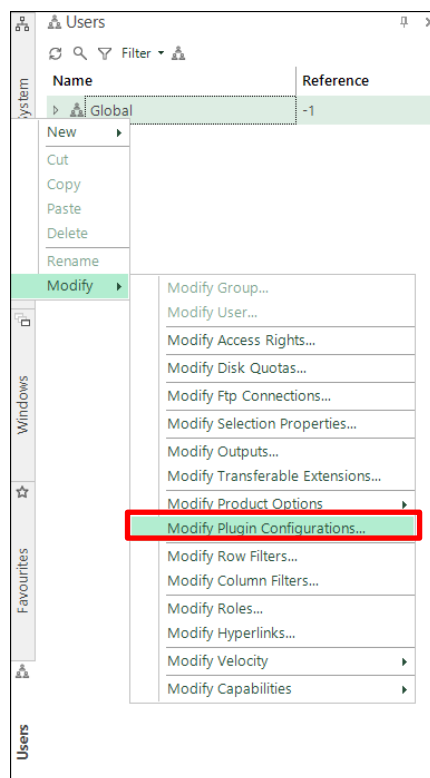


6. On the Plugins tab ensure the **Apteco.Discoverer.Plugins.EmailBroadcasting** check box is selected then click **OK**

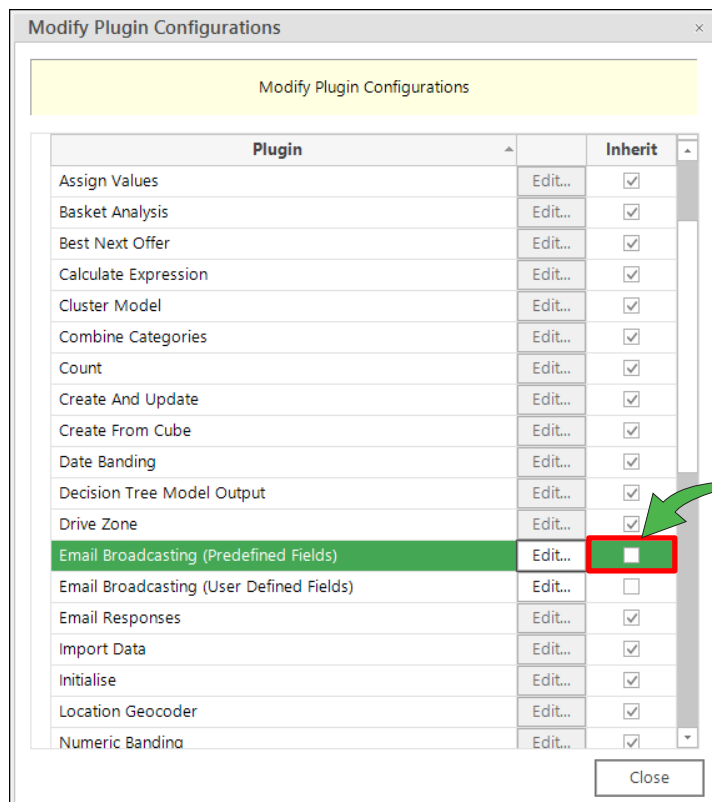


4.2 Configuration in FastStats

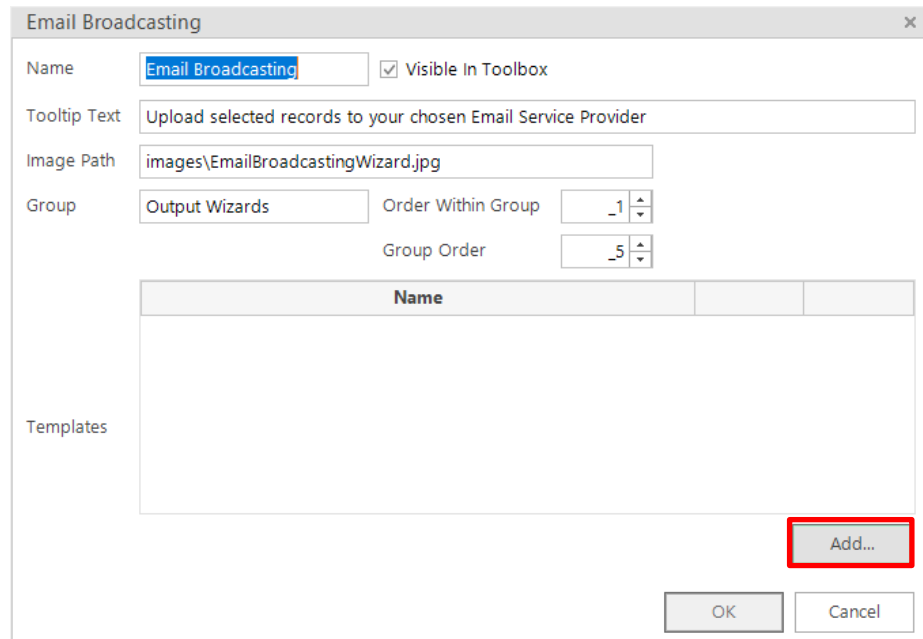
1. Open Apteco FastStats, select the **Users** explorer, right-click on the **Global** node then navigate to **Modify > Plugin Configurations**



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



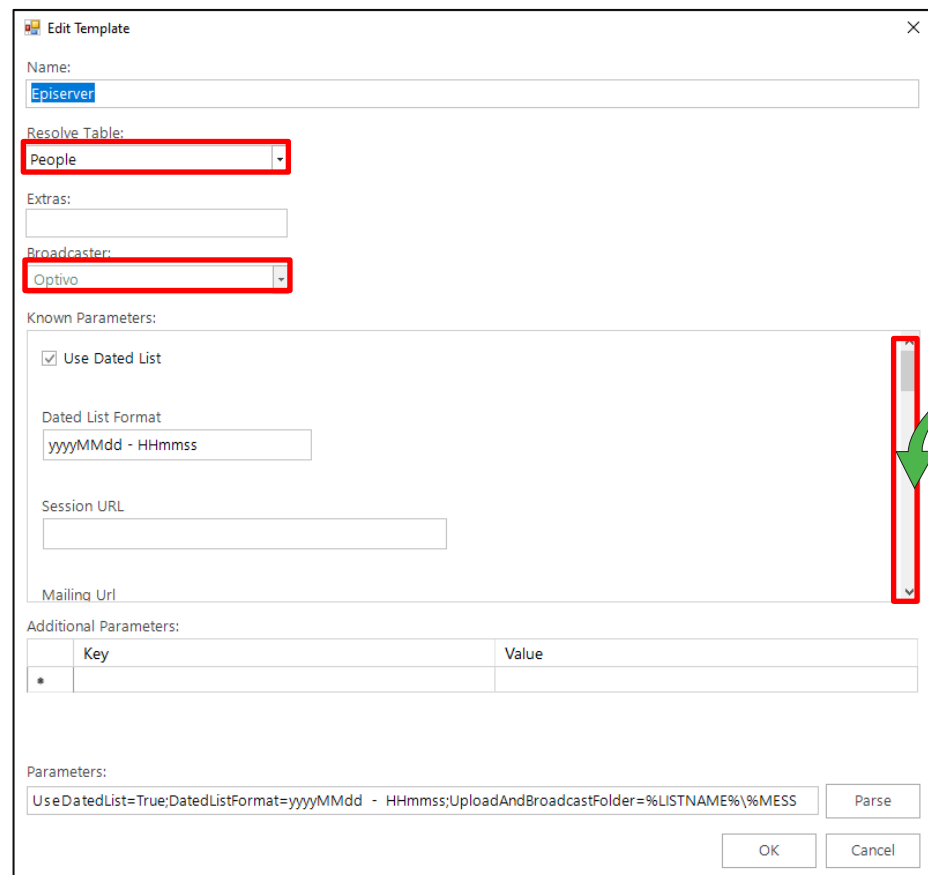
- Click **Add** to add a new template



The 'Email Broadcasting' dialog box contains the following fields and controls:

- Name:** Text box containing 'Email Broadcasting'.
- Visible In Toolbox:** Checked checkbox.
- Tooltip Text:** Text box containing 'Upload selected records to your chosen Email Service Provider'.
- Image Path:** Text box containing 'images\EmailBroadcastingWizard.jpg'.
- Group:** Text box containing 'Output Wizards'.
- Order Within Group:** Spin box set to '1'.
- Group Order:** Spin box set to '5'.
- Templates:** A large empty rectangular area.
- Add...:** A button at the bottom right, highlighted with a red rectangle.
- OK:** A button at the bottom center.
- Cancel:** A button at the bottom right, next to the OK button.

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



The 'Edit Template' dialog box contains the following fields and controls:

- Name:** Text box containing 'Episerver'.
- Resolve Table:** Drop-down menu showing 'People', highlighted with a red rectangle.
- Extras:** Empty text box.
- Broadcaster:** Drop-down menu showing 'Optivo', highlighted with a red rectangle.
- Known Parameters:**
 - Use Dated List:** Checked checkbox.
 - Dated List Format:** Text box containing 'yyyyMMdd - HHmmss'.
 - Session URL:** Empty text box.
 - Mailing Url:** Empty text box.
- Additional Parameters:**

	Key	Value
*		
- Parameters:**

UseDatedList=True;DatedListFormat=yyyyMMdd - HHmmss;UploadAndBroadcastFolder=%LISTNAME%\%MESS

Parse
- OK:** Button at the bottom center.
- Cancel:** Button at the bottom right.

A red vertical rectangle highlights the right side of the 'Known Parameters' section, with a green arrow pointing downwards, indicating where to scroll to enter additional parameters.

Note:

Scroll to enter the Known Parameters information, * indicates a required parameter.
The Episerver integration name in the FastStats system is called Optivo

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

Table 3 – Edit Template Known Parameters Settings

Field	Settings
	*Example, these will be specific to your account
Client ID	Your Episerver Client ID
Urn Field Name	Urn
Email Field Name	Email
Use Dated List	false
Template List Name	*ClosedLoopWebServiceTemplate: master
Upload Only Folder	%LISTNAME%
Upload and Broadcast Folder	%LISTNAME%\%MESSAGE%NAME%
Use Closed Loop	true
Closed Loop Layout	*Kunden ID Email Salutation Title Firstname Lastname mobile fon fax Print_Anrede Print_Vorname Print_Nachname Print_Strasse Print_Hausnummer Print_Strasse_und_Hausnummer Print_Adresszusatz Print_Postfach Print_Postleitzahl Print_Stadt Print_Land Message Discount Communication Key
Encoding	UTF8

Note:

*These settings will be specific to your Episerver account. See Appendix

Note:

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

Note:

You need to create the additional fields in the same order as the pipe delimited text in the **Closed Loop Layout**

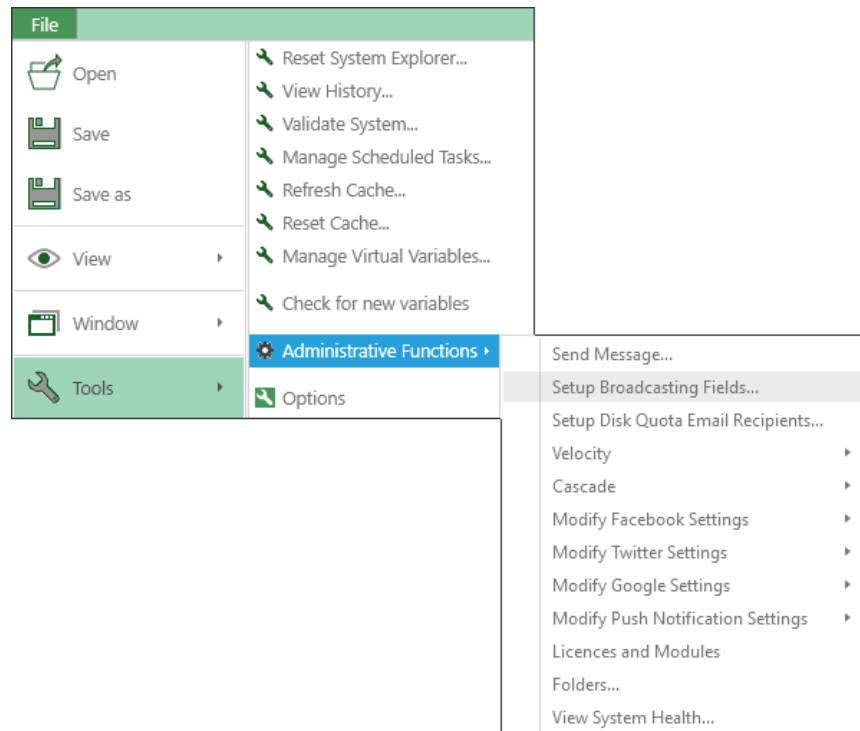
4.3 Adding a Predefined Broadcasting Field Set

As Episerver is a predefined digital integrator, you need to define a predefined output sequence which will identify the variables that will be uploaded in your list.

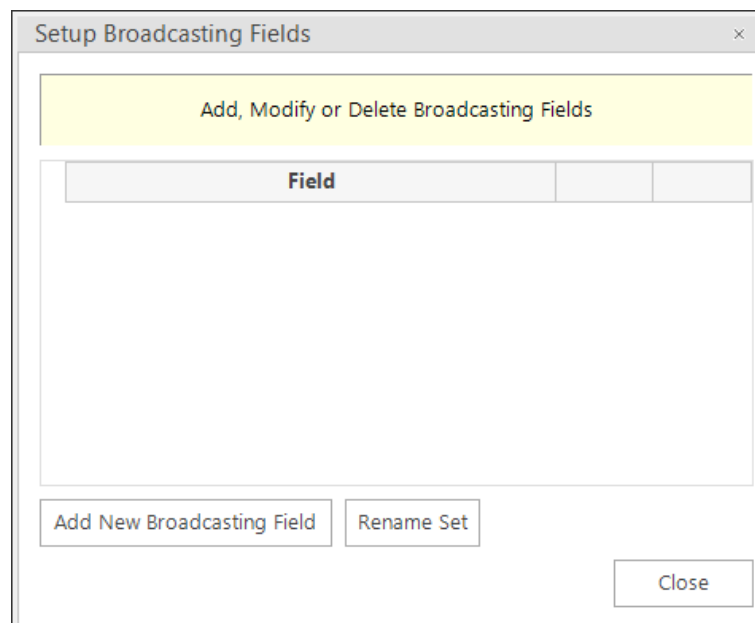
Note:

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

1. From FastStats select Tools > Administrative Functions > Setup Broadcasting Fields



2. The **Setup Broadcasting Fields** dialogue opens, Click **Add New Broadcasting Field**



3. Enter the **Set Name** to match the **Template Name** in Episerver

Note:

Use the **Set Name** to associate each new output field with a Set

1. Click **Add New Broadcasting Field** and complete each **Update Broadcasting Field** dialogue until the list of broadcasting fields is complete

Table 4 – Predefined Broadcaster Output Sequence Fields

Parameter	Settings to use
Set Name	Template name in Episerver
Variable	Select the Variable that you wish to include in your sequence
Header (Optional)	Use the Header field to give the variable a name so that it matches the field name in your Adestra Core Table or Data Table within your profile
Output Style	Select to either the Code or Description from the Output Style drop-down.
Output Unclassified as Spaces	Select this check-box if you wish unclassified values to appear as spaces or if this variable is an email or SMS field
Email Field	Select this check-box when defining the Email field.
SMS Filed	Select this check-box when defining the SMS field.
Sequence Id	The Sequence ID allows you to order your variables in the set.

4. At least one of the fields must be an Email Address

Update Broadcasting Field

Set Name:

Variable:

Header (optional):

Output Style:

☐ Output Unclassified as Spaces
☒ Email Field
☐ SMS Field

Sequence Id:

Note:

You can create multiple templates and sets and then reference these separately from your email broadcasts.

Setup Broadcasting Fields

Add, Modify or Delete Broadcasting Fields

Set Name : Episerver (3 items)

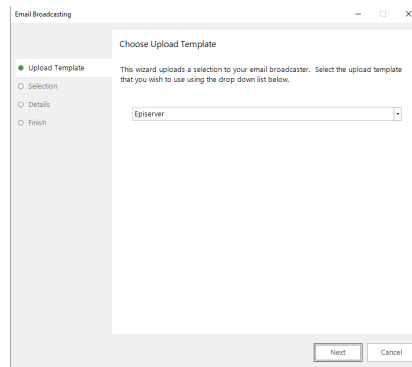
Field		
Person URN	Edit...	Delete...
▶ Email Address	Edit...	Delete...
Forename	Edit...	Delete...

+ Set Name : Generic FTP (4 items)
+ Set Name : Teradata (5 items)

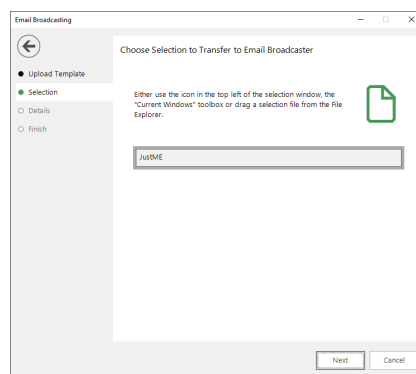
4.4 Checking your configuration

To use the Email Broadcasting Wizard, select the Email Broadcasting icon from the Output Wizards section on the Wizards panel. This will send a test email.

1. Select the Upload Template, if you have multiple upload sequences configured select the template from the drop down list and click **Next**. Otherwise, you will be taken straight to the **Selection** step



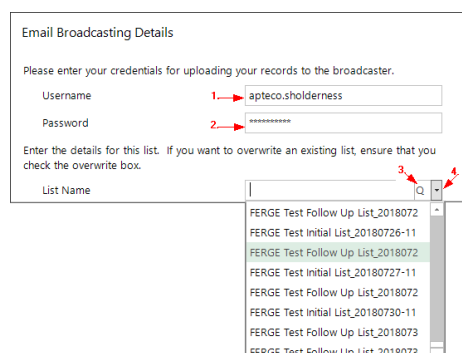
2. Drag a selection from FastStats with the contact/s you wish to send a test message to



Tip:

Email Broadcasting Details Form

1. Enter the Username
2. Enter the Password
3. Click the List Name retrieve button
4. After a short while you should be able to use the drop-down list to see the available lists from Episerver



If you do not see a list do not proceed, something is wrong in a previous configuration.

3. Complete the **Email Broadcasting Details** form then click **Finish**

Email Broadcasting

←

- Upload Template
- Selection
- Details
- Finish

Email Broadcasting Details

Please enter your credentials for uploading your records to the broadcaster.

Username:

Password:

Enter the details for this list. If you want to overwrite an existing list, ensure that you check the overwrite box.

List Name:

☐ Overwrite an existing list

Message Name:

A copy of the list will be saved to the directory below.

When the list has been processed and is ready, the broadcaster will send a confirmation email.

Email Address:

Table 4 – EmailResponseGatherer.exe.config Settings

Option	Settings to use
Username	A username from your Episerver account
Password	The password for your Episerver account
List Name drop-down	Click on the List Name retrieve button and select a list from the drop-down (select any list name as for Episerver the List is defined by the Message)
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

4. 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

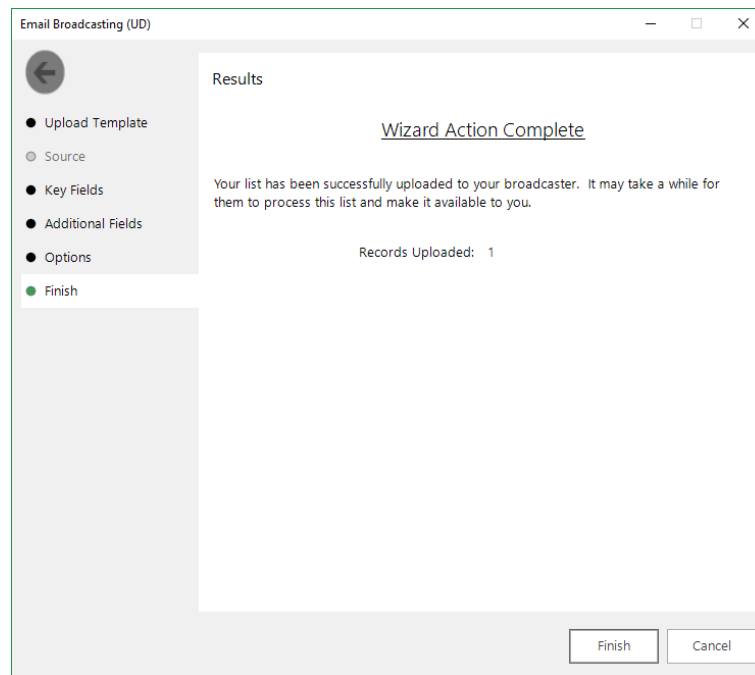
Broadcast Warning

?

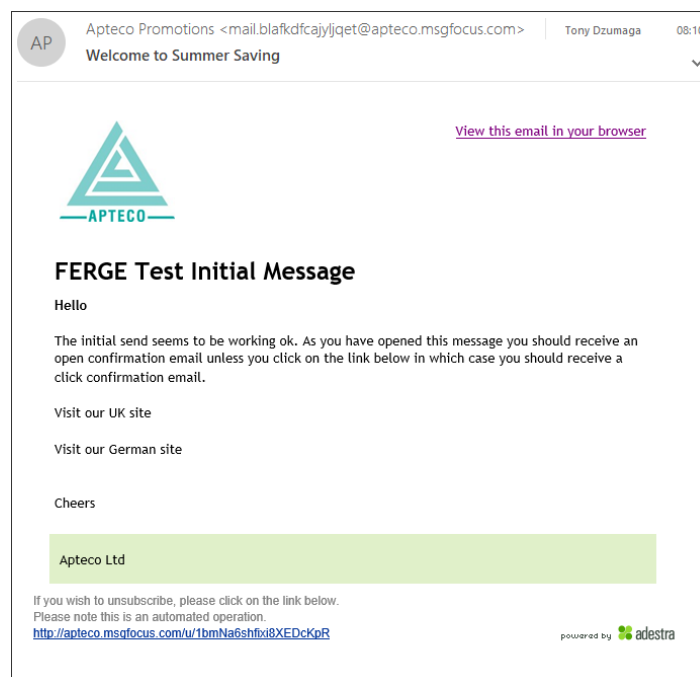
You have chosen to broadcast a message to the selected recipients.
On confirming this action, an upload and automatic broadcast will take place.

Are you sure you wish to continue with this action?

5. 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.



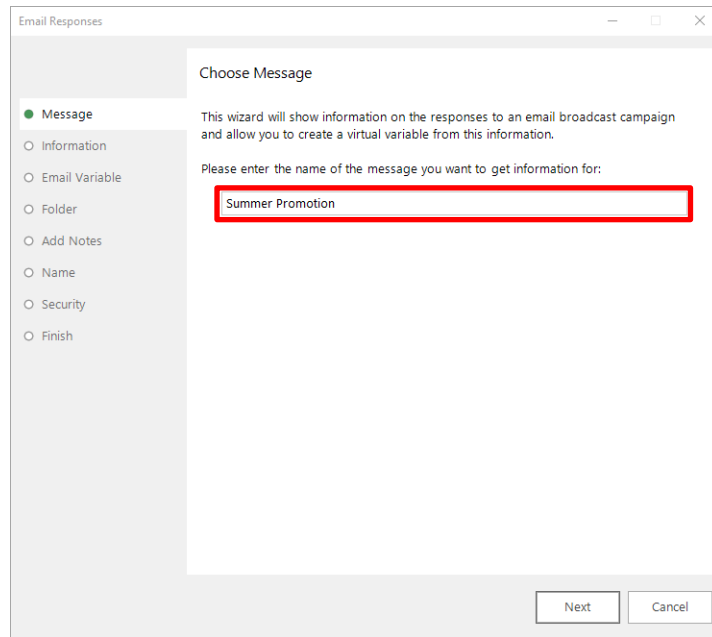
6. The recipients in your selection should receive an email using the template from Episerver



4.5 Email Responses Wizard

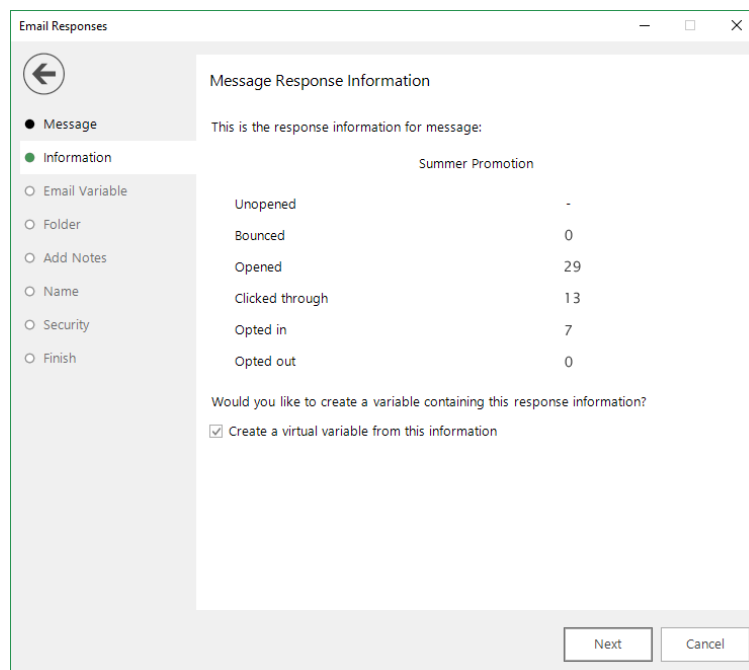
When your emails have been sent out you can start analysing the responses from your target audience.

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



The screenshot shows the 'Email Responses' wizard window. On the left is a sidebar with a list of steps: Message (selected with a green dot), Information, Email Variable, Folder, Add Notes, Name, Security, and Finish. The main area is titled 'Choose Message'. It contains the text: 'This wizard will show information on the responses to an email broadcast campaign and allow you to create a virtual variable from this information.' Below this, it says 'Please enter the name of the message you want to get information for:' followed by a text input field containing 'Summer Promotion'. At the bottom right are 'Next' and 'Cancel' buttons.

3. As the Email Response Gatherer starts collecting information from Episerver, 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



The screenshot shows the 'Email Responses' wizard window at the 'Message Response Information' step. The sidebar now has 'Information' selected with a green dot, and a back arrow is visible at the top left. The main area is titled 'Message Response Information' and says 'This is the response information for message: Summer Promotion'. Below this is a table showing response statistics:

Unopened	-
Bounced	0
Opened	29
Clicked through	13
Opted in	7
Opted out	0

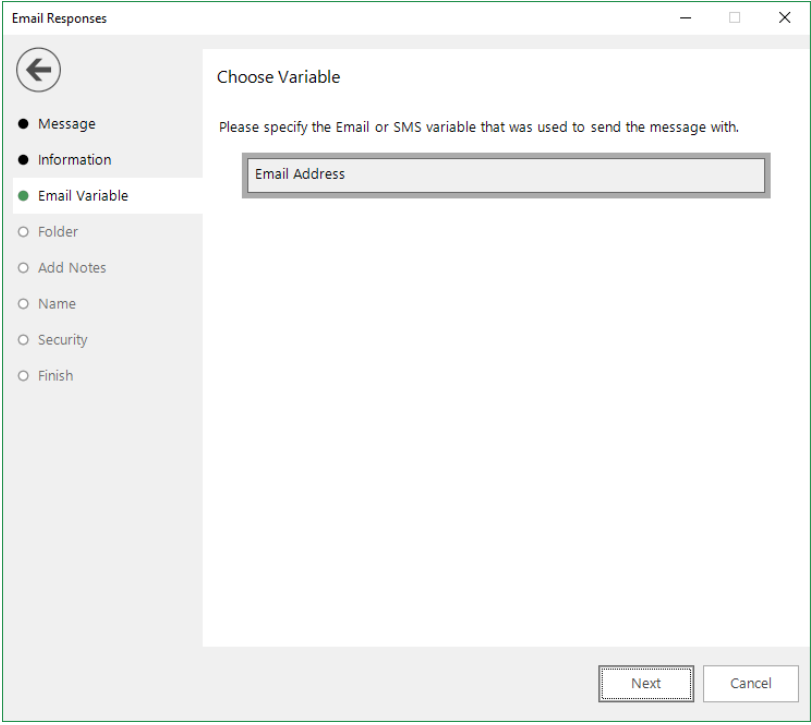
Below the table, it asks 'Would you like to create a variable containing this response information?' with a checked checkbox labeled 'Create a virtual variable from this information'. At the bottom right are 'Next' and 'Cancel' buttons.

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

Choose Variable

Please specify the Email or SMS variable that was used to send the message with.

Drop your variable here



Email Responses

Choose Variable

Please specify the Email or SMS variable that was used to send the message with.

Email Address

Next Cancel

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

Email Responses

Choose Folder for Variable

Select the folder where the new variable will be created from the list below.

System Folders

- ▲ ApteconsLIVE
 - Household
 - Person
 - Company Socials
 - Shows
 - Communications
 - Journey History
 - Email Responses
 - Others

You can also right-click on a folder to add a new folder, or rename and delete the folder you have added.

Variables cannot be created directly in the root, so these will be added to the 'Others' folder.

Next Cancel

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

The screenshot shows the 'Email Responses' dialog box with the 'Add Notes to Variable' step selected in the left sidebar. The main area contains a text input field for notes and a 'Next' button.

Dialog Title: Email Responses

Left Sidebar:

- Message
- Information
- Email Variable
- Folder
- Add Notes**
- Name
- Security
- Finish

Main Content:

Add Notes to Variable

Enter any notes you want to associate with your variable. Your username will automatically be recorded.

Buttons: Next, Cancel

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**

The screenshot shows the 'Email Responses' dialog box with the 'Choose Variable Description' step selected in the left sidebar. The main area contains a text input field for the description, a drop box for overwriting variables, and checkboxes for 'Create URN Snapshot' and 'Modify Security Attributes'.

Dialog Title: Email Responses

Left Sidebar:

- Message
- Information
- Email Variable
- Folder
- Add Notes
- Name**
- Security
- Finish

Main Content:

Choose Variable Description

We need a description for your new variable. A unique variable reference will be created for the variable based on the description and table name.

Description: Summer Promotion Response

Alternatively you can choose to overwrite an existing virtual variable with these new values. Drag the variable to be overwritten onto the panel below.

Drop the variable to overwrite here

If you want to create a URN Snapshot of this variable (so that it will be recreated to contain exactly the same records after a system refresh) check the checkbox. [help...](#)

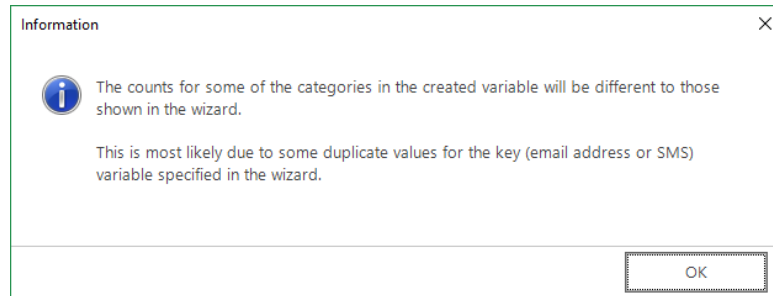
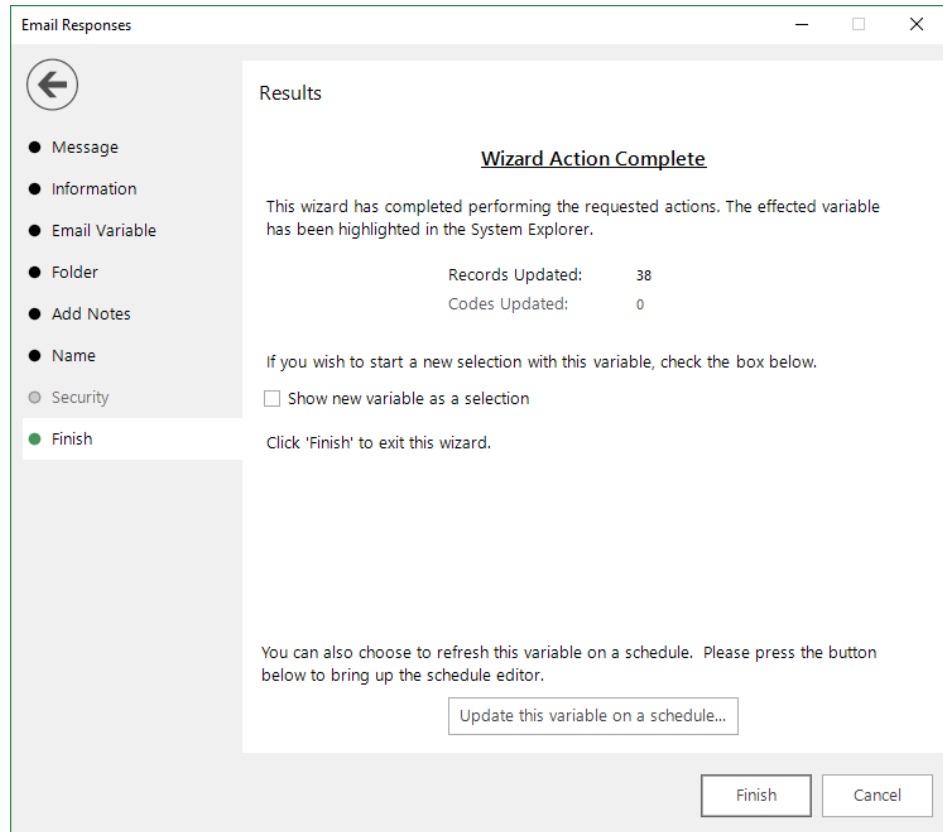
☐ Create URN Snapshot

If you wish to change the security attributes for this variable for yourself, your group or other users check the checkbox below.

☐ Modify Security Attributes

Progress bar: 0%

Buttons: Next, Cancel

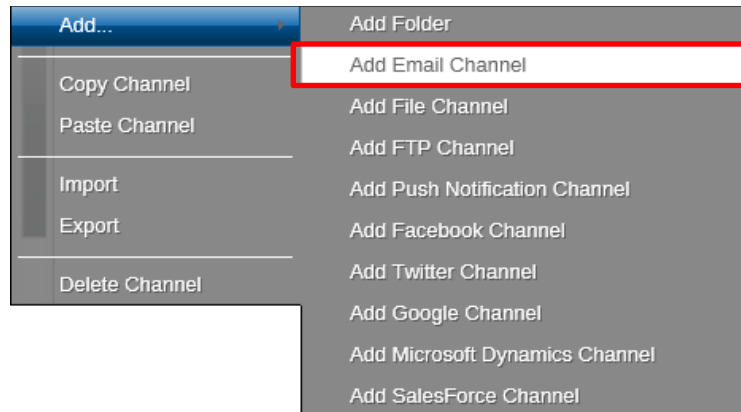
8. Click **OK**9. Click **Finish**

5 PeopleStage Broadcasting & Responses

5.1 Defining the Broadcast Channel in PeopleStage

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

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**

A screenshot of the 'Channel Editor' form. The form has several tabs: 'Channel Settings', 'Output Settings', 'File Settings', 'Parameter Settings', 'Additional Variables', and 'Cost Settings'. The 'Channel Settings' tab is active. In this tab, the 'Channel Name' field is highlighted with a red rectangular box and contains the text 'Email - Episerver'. Below this field is a dropdown menu for 'Allow In Transactional Output' with the value 'Never'. There are two buttons: 'Test Login' and 'Test Broadcast'. At the bottom of the form, there is an 'Errors' section with a downward arrow icon.

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 Episerver

Table 5 –PeopleStage Output Settings

Field	Settings
Broadcaster	Select Optivo from the drop-down
Username	Enter your API username
Password	Enter your API password
Variable Name	Select Email Address from the drop-down
Variable Description Override	Enter the description, for example, “ Email ” Note: This must correspond to the e-mail field within Episerver
Upload but don't broadcast	(Optional) – Select this check box to upload the list only without initiating a broadcast
Append to List	Deselected
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 Episerver.
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**

There are validation errors indicated in red

Refresh Editor

Save & Close

Channel Settings

Output Settings

File Settings

Parameter Settings

Additional Variables

Cost Settings

☐ Zip File

Output File Format: Comma Separated Values (CSV)

Output Header: Descriptions

Delimiter: Tab

Alpha Encloser: None

Numeric Encloser: None

Extras:

Encoding: utf-8

Errors

Parameter ApiBase has no value set

Parameter FTPUsername has no value set

Parameter FTPPassword has no value set

Note:

The Encoding is set to UTF8 in the code

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

You will be able to get these from Episerver or contact your Partner or Apteco

Parameter Name	Parameter Value
Client ID	53712729216
Urn Field Name	Urn
Email Field Name	Email
Use Dated List	false
Template List Name	ClosedLoopWebserviceTemplate: master
Upload Only Folder	%LISTNAME%
Upload And Broadcast Folder	%LISTNAME%\%MESSAGE%NAME%
Use Closed Loop	true
Closed Loop Layout	Kunden ID Email Salutation Title Firstname Lastname mobile fon fax Print_Anrede Print_Vorname Print_Nachname Print_Strasse Print_Hausnummer Print_Strasse_und_Hausnummer Print_Adresszusatz Print_Postfach Print_Postleitzahl Print_Stadt Print_Land Message Discount Communication Key
Encoding	UTF8

ClientID=53712729216;UrnFieldName=Urn;EmailFieldName=Email;UseDatedList=false;TemplateListName=Closed

Errors

Table 6 –Example PeopleStage Parameter Settings

Field	Settings
	*Example, or these will be specific to your account
Client ID	Your Episerver Client ID
Urn Field Name	Urn
Email Field Name	Email
Use Dated List	false
Template List Name	*ClosedLoopWebServiceTemplate: master
Upload Only Folder	%LISTNAME%
Upload and Broadcast Folder	%LISTNAME%\%MESSAGE%NAME%
Use Closed Loop	true
Closed Loop Layout	*Kunden ID Email Salutation Title Firstname Lastname mobile fon fax Print_Anrede Print_Vorname Print_Nachname Print_Strasse Print_Hausnummer Print_Strasse_und_Hausnummer Print_Adresszusatz Print_Postfach Print_Postleitzahl Print_Stadt Print_Land Message Discount Communication Key
Encoding	UTF8

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

Note:

You need to create the additional fields in the same order as the pipe delimited text in the **Closed Loop Layout** parameter.

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

Channel Settings
Output Settings
File Settings
Parameter Settings
Additional Variables
Cost Settings

	Variable Name	Variable Descrip	Output Type	Formatting	Unclassified as blan
>	Person URN (PePer	Kunden ID	-	-	-
	Email Address (PeE	Email	-	No Formatting	-
	Null (pe1KXVSD)	Salutation	-	No Formatting	-
	Title (PeTitle)	Title	Descriptions	No Formatting	☐
	Forename (PeForen	Firstname	-	No Formatting	-
	Surname (PeSurnar	Lastname	-	No Formatting	-
	Mobile (PeMobile)	mobile	-	No Formatting	-
	Telephone (HoTelep	fon	-	No Formatting	-
	Null (pe1KXVSD)	fax	-	No Formatting	-
	Null (pe1KXVSD)	Print_Anrede	-	No Formatting	-
	Null (pe1KXVSD)	Print_Vorname	-	No Formatting	-
	Null (pe1KXVSD)	Print_Nachname	-	No Formatting	-
	Null (pe1KXVSD)	Print_Strasse	-	No Formatting	-
	Null (pe1KXVSD)	Print_Hausnummer	-	No Formatting	-
	Null (pe1KXVSD)	Print_Strasse_und_	-	No Formatting	-
	Null (pe1KXVSD)	Print_Addresszusatz	-	No Formatting	-
	Null (pe1KXVSD)	Print_Postfach	-	No Formatting	-
	Null (pe1KXVSD)	Print_Postelzahl	-	No Formatting	-
	Null (pe1KXVSD)	Print_Stadt	-	No Formatting	-
	Null (pe1KXVSD)	Print_Land	-	No Formatting	-
	Forename (PeForen	Message	-	No Formatting	-
	Forename (PeForen	Discount	-	No Formatting	-
Click here to add new item					

☐ Add Additional Variables Directly

Additional Variables Location:

Note:

You need to create the additional fields in the same order as the pipe delimited text in the **Closed Loop Layout** parameter.

Tip:

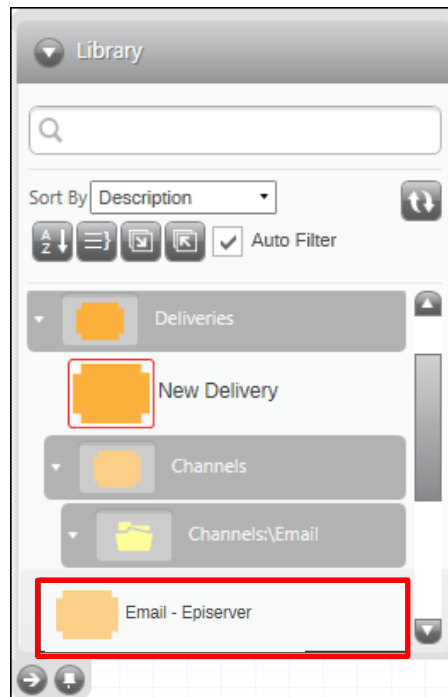
You can map actual variables from your FastStats System or you can use an empty Virtual Variable (VV) text field created in FastStats to map to the Episerver fields, the example shown uses a VV field called Null.

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 Episerver channel from the Library to your Delivery step



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



3. Deselect the **As above** check-box use the same **List Name** as the **Message Name**

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

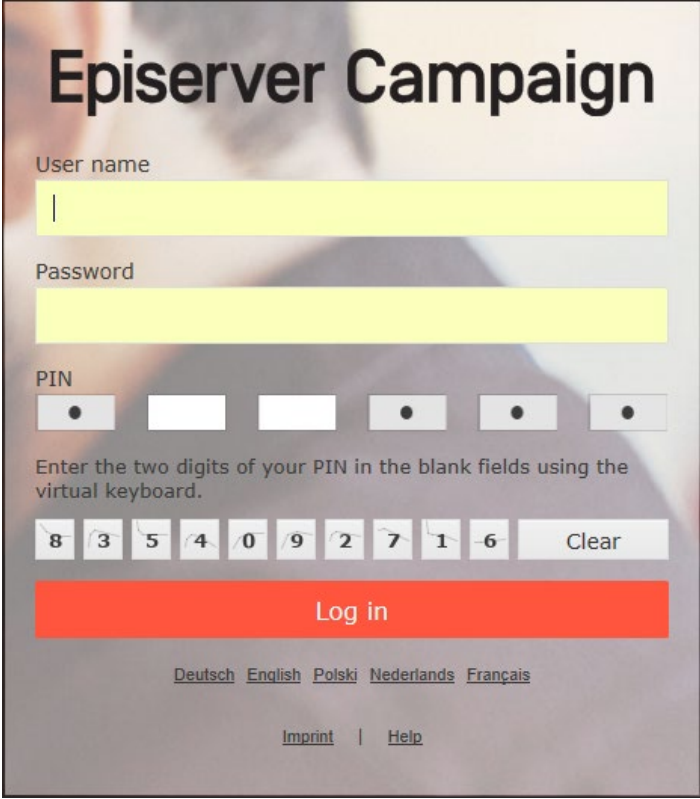
Appendix A: Episerver Configuration

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 Episerver using a Smart Campaign.

Note:

This section is not intended as a full manual on setting up your messages in Episerver please refer to the Episerver help or contact Episerver for more information.

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



The screenshot shows the 'Episerver Campaign' login interface. It features a title 'Episerver Campaign' at the top. Below the title are three input fields: 'User name' (a yellow text box), 'Password' (a yellow text box), and 'PIN' (a row of six boxes, each containing a dot). Below the PIN fields is a text prompt: 'Enter the two digits of your PIN in the blank fields using the virtual keyboard.' This is followed by a virtual keyboard with buttons for digits 8, 3, 5, 4, 0, 9, 2, 7, 1, 6, and a 'Clear' button. Below the keyboard is a large red 'Log in' button. At the bottom, there are links for language selection: 'Deutsch', 'English', 'Polski', 'Nederlands', and 'Français'. At the very bottom are links for 'Imprint' and 'Help'.

Note:

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

The following items are required in Episerver:

Recipients

For initial testing you should create a Recipient list which includes yourself, you can either create a recipient or Import a recipient to a list.

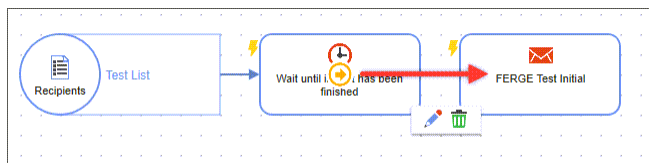
- Recipients List in Episerver

- Import Recipients Wizard – Row Mapping Step

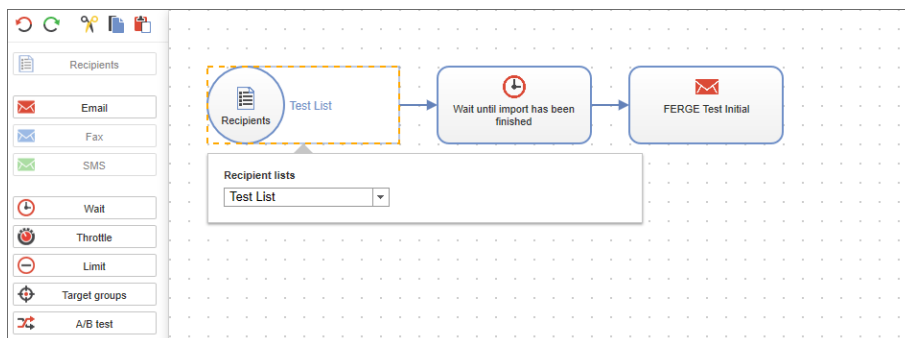
- Import Recipients Wizard – Import Options Step

Smart Campaign

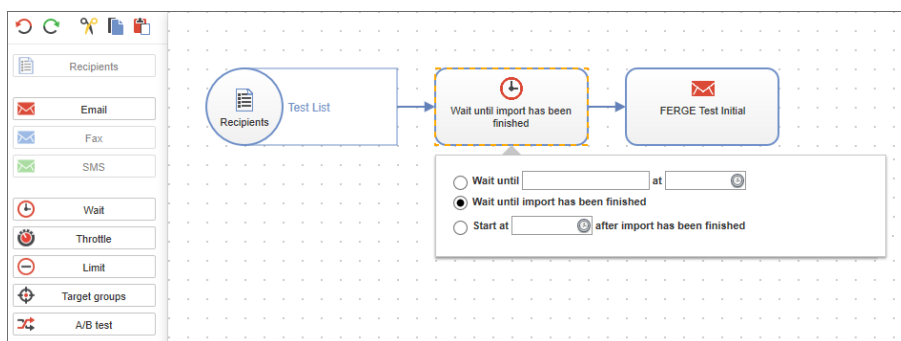
- Create a Smart Campaign with the following minimum items



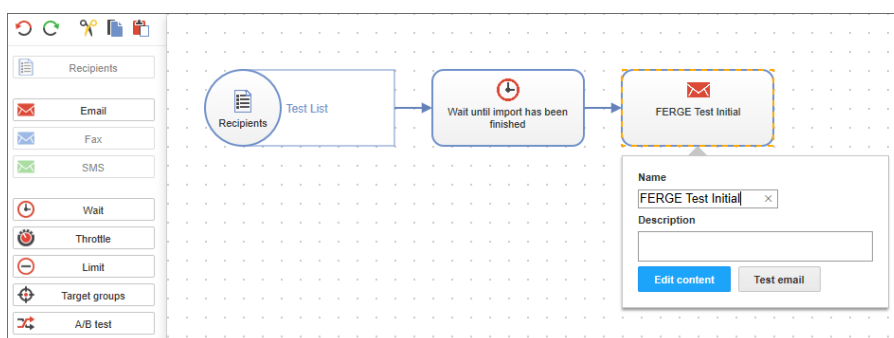
- Connect the steps
- Recipients – Select the list to use



- Wait Step – Set to **Wait until import has been finished**



Message – Create an Email message and personalise



Note:

You can migrate a Classic Mailings to a Smart Campaign

The Smart Campaign needs to be Activated

Tip

The **Smart Campaign** name is the **Message name** used in the PeopleStage Delivery

Appendix B: API Parameters

Table 9 – Email Response Gatherer Parameters

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

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

	Required	Response Table field	Episerver 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	Email	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
RUNCOLUMNNAME	N		Reserved for future use
TYPECOLUMNNAME	N	MessageType	Response type
MESSAGENAMECOLUMNNAME	N		The message name is not returned in the Episerver 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

Note:

*These settings are specific to each Episerver account.

Continued

Additional Configuration	Required	Default	Description
DATEFORMAT	N		Date format used e.g. dd.MM.yyyy HH:mm
DATEOFFSET	N	0	Value in hours to offset any date values received. This allows you to write responses in your current time zone.
MAXRETRIES	N	1000	The number of times the Email Response Gatherer will check to see if the extract file exists on the ftp site
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	Type of enclose used in the extract file
TreatTypeAsAdditionalField	N	false	Setting this to true will force the raw response type to be written to the ResponseDetails table before any conversion is carried out
TreatMessageNameAsAdditionalField	N	false	Setting this to true will force the raw message name to be written to the ResponseDetails table before any conversion is carried out
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.

Table 10 – Email Broadcasting Parameters

Parameter	Required Y/N	Default	Description *Example, or these will be specific to your account
Client ID	Y		Your Episerver Client ID
Urn Field Name	Y	Urn	
Email Field Name	Y	Email	
UseDatedList	Y	false	Setting this to false will remove the date and time stamp at the end of the file name
Template List Name	Y		*ClosedLoopWebServiceTemplate: master
Upload Only Folder	Y	%LISTNAME%	*You can define this using absolute folder and pathnames or use the parameters shown
Upload and Broadcast Folder	Y	%LISTNAME%\%MESSAGE%	* You can define this using absolute folder and pathnames or use the parameters shown
Use Closed Loop	Y	true	Setting to use with Smart Campaign
Closed Loop Layout	Y		*Kunden ID Email Salutation Title Firstname Lastname mobile fon fax Print_Anrede Print_Vorname Print_Nachname Print_Strasse Print_Hausnummer Print_Strasse_und_Hausnummer Print_Adresszusatz Print_Postfach Print_Postleitzahl Print_Stadt Print_Land Message Discount Communication Key
UploadEmptyLists	N	true	Set this to false if you wish to prevent empty list being uploaded to Episerver
	N	true	
DatedListFormat	N	yyyMMdd-HHmss	The date format string for the date and time stamp if created
MaxImportWaitTime	N	7200 (120 minutes)	The maximum time to wait for a list to be imported in seconds
Encoding	Y	UTF8	Enter the encoding of the incoming file
EscapeQuotes	N	False	Set this to true to escape quote characters
MailingListRetentionPeriod	N	0	The number of days to keep the uploaded mailing list
File Mapping	N		To be completed
Closed Loop Url	N		To be completed
Mailing Url	N		To be completed
Recipient List Url	N		To be completed
Recipient Url	N		To be completed
Session Url	N		To be completed

Appendix C:Example Batch File

Example batch file to use with FERG and scheduling

```
@echo off

REM *****

REM File Name: EpiserverBatchFile.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\Episerver.txt"

SET LOGFILEDETAILS="Logs\Episerver_Details.txt"

echo. >> %LOGFILE%

echo. >> %LOGFILEDETAILS%

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

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

echo. >> %LOGFILE%

>> %LOGFILEDETAILS%

echo.

%FERG% Episerver.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 Episerver Responses OK >> %LOGFILE%
```

```
goto Complete
```

```
:FailedLogin
```

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

```
goto Complete
```

```
:FailedDownload
```

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

```
goto Complete
```

```
:FailedLogout
```

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

```
goto Complete
```

```
:FailedException
```

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

```
goto Complete
```

```
:Complete
```

```
echo %date% %time% - Completed FastStats Episerver 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\Episerver.xml'.

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

```
%FERG% Episerver.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)

Note: If you have purchased the Apteco Marketing Suite™ via one of our partners then they are your first line of support.

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