

# Apteco Technical Guide



## Apteco Integrations Adestra Setup Guide

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

A bit about the broadcaster



Upland Adestra was formerly called Adestra

### Before You Begin

#### CAUTION

This guide details the steps required to integrate Apteco with a Broadcaster using an API; the configuration is in two parts:

1. Configuration in your broadcaster, this document.
2. The configuration of the Apteco Marketing Suite, which is covered in the online help



You need to configure Upland Adestra before you perform the integration in Apteco, this document is an overview of the broadcaster setup process, it is not intended to be an in-depth broadcaster setup document, please see the documentation provided by Upland Adestra

## Note:

We take care to keep the information up to date. There may be changes to the broadcaster's API not reflected here. If in doubt, contact your support department or the broadcaster for more information.

## Useful to have before you start:

- The Variables or Virtual Variables in FastStats to map to broadcast fields
- The Upland Adestra UI URL, **Account Name**, **Username**, and **Password** to log in to your broadcaster
- The Upland Adestra **Message** name (available from the Upland UI)
- The API URL <https://new.adestra.com/api/xmlrpc>
- The Upland Adestra API Username and **Password**  
(The API Username is a combination of the above **AccountName.Username**)
- The **\*Username/s** to associate with a broadcast in Apteco
- The **FTP URL** for uploading to Upland Adestra  
(Either your own FTP location or the Upland Adestra provided Client FTP URL)
- The Upland **Workspace**, **Core Table** name and **Data Table** name

\*You can create individual users within Upland Adestra to associate with a broadcast

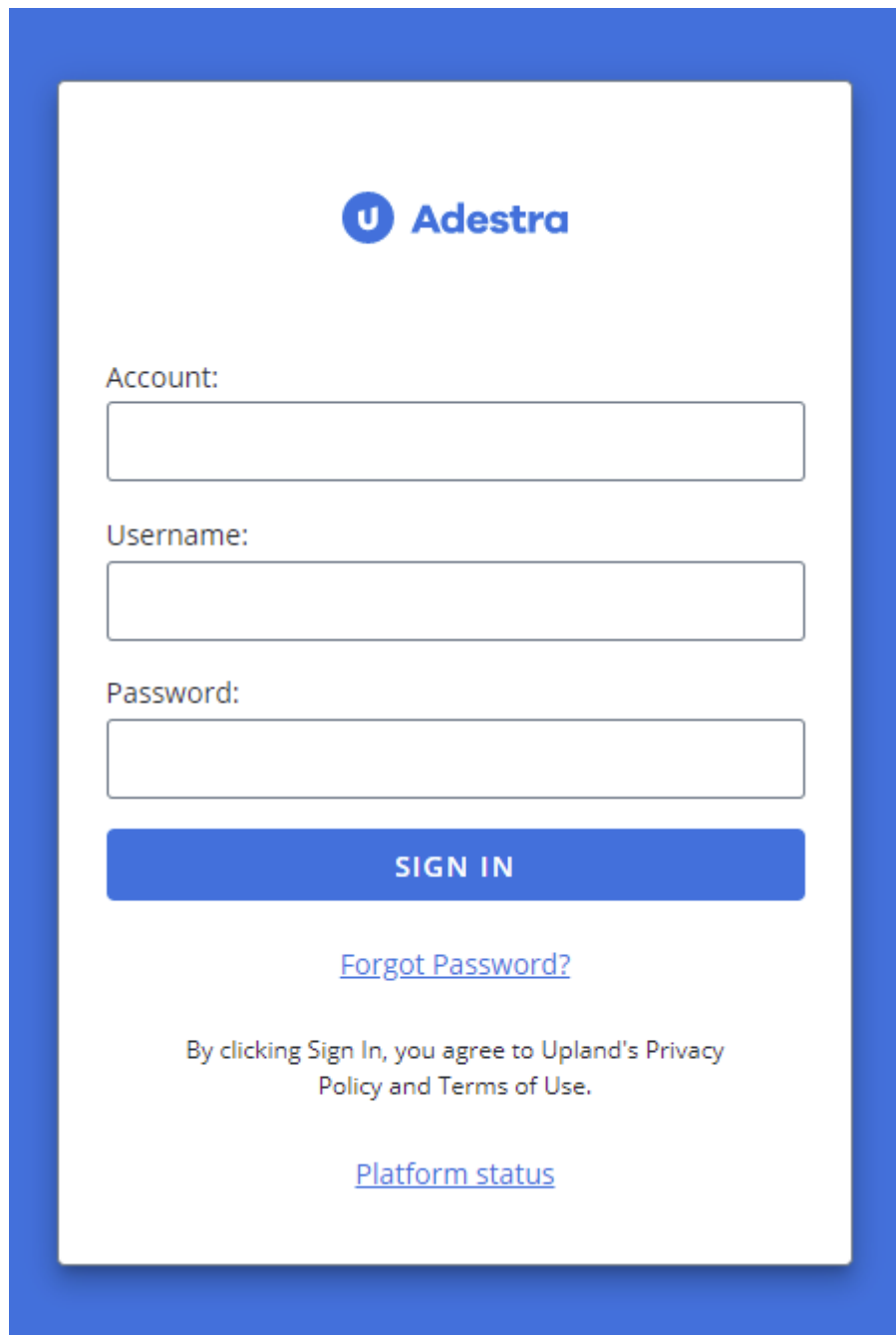
# Upland Adestra Configuration

Upland Adestra works on the principle of having a database to store the lists you upload, you will need a Core Table and a Data Table setup in your Upland account. Apteco will upload a list of subscribers and insert them into the Upland tables.

If you wish to automatically broadcast the list to a message from Apteco, you need to create a Workspace, Project, and a Campaign with a message within

Upland Adestra. Also to collect responses you will need to set up an Export to create a Report.

- Sign in to your Upland Adestra account to access the web-based control panel

The image shows a login form for Upland Adestra. It features a blue header with the Upland Adestra logo. Below the logo are three input fields labeled 'Account:', 'Username:', and 'Password:'. A blue 'SIGN IN' button is positioned below the password field. Below the button is a link for 'Forgot Password?'. At the bottom, there is a line of text stating 'By clicking Sign In, you agree to Upland's Privacy Policy and Terms of Use.' and a link for 'Platform status'.

## Note:

This section uses a specific example to show the areas that need to be set up in Upland, your setup will likely be different, please contact Upland support or the

Upland help for additional information.

## Tables in Upland



You will need the following tables:

### Core Table (Required)

This table stores the main communication parameters, it is referenced in the Broadcaster's Plugin Upload Template as Core Table

Example Core Table Fields

#### Core Table

 Field	 Description
<u>email</u>	Active email address* (Dedupe field in Settings)
<u>person_urn</u>	
<u>forename</u>	Contact's forename
<u>surname</u>	Contact's surname
<u>title</u>	Contact's title



These will be specific to your account

### Data Table

This table stores additional parameters for Apteco and any custom fields, it is referenced in the Broadcaster's Plugin Upload Template as Supplemental Table

Example Data Table Fields

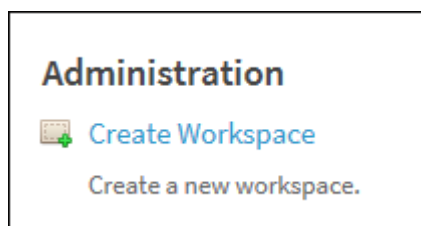
#### Data Table

 Field	 Description
<u>Communication_key</u>	Active email address* (Dedupe field in Settings)
<u>subject</u>	
<u>fergecontent</u>	Contact's forename
<u>Run_number</u>	Contact's surname

These will be specific to your account

# Setting up a Campaign in Upland

- From: **Campaigns** go to *workspaces > Administration > Create Workspace*

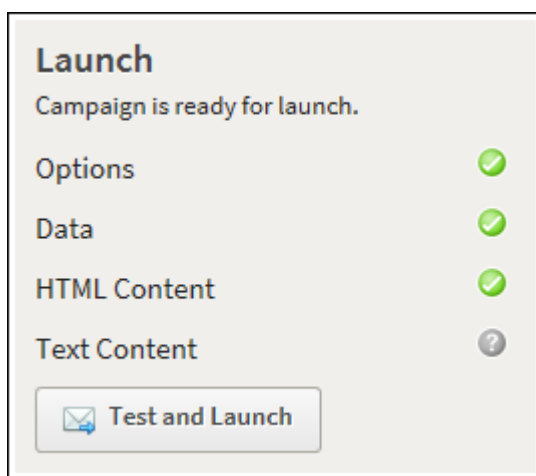


The Create Workspace page opens

- Enter a **Name** for the Workspace and customize using the options.
- If a Workspace exists select the Workspace that you wish to create the campaign in. You will reference this workspace in the configuration within Apteco.

## Note:

Upland will prompt you for all the required settings, the status area on the right will display your configuration progress.



For example, you will also need to specify a List

- You can either select the **Project** that you wish to create the campaign in or create a new project by clicking **Create Project**

The screenshot shows the Apteco Sandbox interface. The top navigation bar includes 'Sandbox', 'Campaigns', 'Data', 'Files', and 'Reports'. Below this is a secondary navigation bar with 'Overview', 'All Campaigns', 'Report', 'Settings', 'Permissions', 'Presets', and 'Calendar'. The user 'Simon Holderness (Apteco)' is logged in. The main content area is titled 'Sandbox' and shows a table with the following data:

Name	Sandbox	Edit
Description		
Owner	Adestra Admin	

Below the table, it says 'Projects in Sandbox'. There is a search bar and a table with the following data:

ID	Project Name	Owner
1	Newsletters	Adestra Admin
2	Marketing	Adestra Admin
17	ESP test	Simon Holderness
50	AndyESP Test	Simon Holderness

On the right side, there is an 'Administration' section with a 'Create project' button and a 'Links' section with 'All workspaces'. At the bottom right, there is a 'Support' section with 'Manuals and Videos', 'support@adestra.com', 'Chat online', '+44 (0)1865 242411', and 'Report a bug'.

- From: **Project** go to *Administration > Create Campaign*

The screenshot shows a button labeled 'Create campaign' with a folder icon. Below the button, it says 'Create a new campaign in this project.'

- Enter a **Campaign name** and choose a colour to easily identify the campaign if required.

## Create Campaign

[Back to ESP test](#)

Define your campaign settings here, they can be changed later in the 'settings' tab.

### Campaign Settings

**Campaign name (required)** ⓘ

**Description** ⓘ

**Colour** ⓘ

B2CDDD

**Owner (required)** ⓘ

[Select User](#)

**Tags**

[Save](#)

Once complete, click **Save**

- Configure the **Campaign options** as appropriate for your message.

[Apteco](#) > [Sandbox](#) > [ESP test](#) > [Summer Saver Promotion](#) > Options

Options

## Campaign Options

[Back to Summer Saver Promotion](#)

Subject line (required) ⓘ

Welcome to Summer Saving ⓘ

Domain (required) ⓘ

apteco.msgfocus.com ▾

From Address

From name (required) ⓘ

Apteco Promotions

☐ Use a custom from address

From prefix ⓘ

mail

Reply Address

☐ Use a custom reply address ⓘ

Unsubscribe handling

☒ Insert unsubscribe link into text parts

☒ Insert unsubscribe link into HTML parts

Unsubscribe page URL

Unsubscribe list ⓘ

Default Unsubscribers ▾

Suppression lists ⓘ

☒ Default Unsubscribers

☒ Marketing Unsub List

☐ Newsletter Unsub List

Save

## Note:

You will need to specify the Unsubscribe handling options to complete the process.

- Add the content to your message and personalize it with fields from the **Core** or Data tables as appropriate.



Apteco > Sandbox > ESP test > Summer Saver Promotion
Overview

## Summer Saver Promotion

**Select a mailing list**  
You can select an existing list, or create a new one.  
Select List Create List

**Add content**  
Add some HTML or text content to your campaign.  
Add HTML Add Text

**Split testing**  
Split testing can help you your campaigns.  
Create split test

**Welcome to Summer Saving**  
From: Apteco Promotions  
<mail.zpnnooxmrn@apteco.msgfocus.com>  
Edit campaign options

HTML
Text

This campaign has no HTML content  
Create HTML content

**Mailing List**  
No list selected  
Select List Create new list

**Launch**  
Before your campaign can be launched, please address the errors below.  

Options ✓  
Data ✗  
No list selected  
Content ✗  
No HTML or text content

- You will also need to select a mailing list, when all the required options have been configured the **Test and Launch** button displays.
- Before you can run a campaign from Apteco, you need to publish the message.

Apteco > Sandbox > ESP test > Summer Saver Promotion Overview

## Summer Saver Promotion

**Split testing**

Split testing can help you to improve your campaigns.

Create split test

**Send a test email**

You haven't tested your campaign since it was last edited.

Send test

**Content & Spam Check**

Test your email in several email clients and all major spam clients.

Create preview

**Welcome to Summer Saving**

From: Apteco Promotions  
<mail.bbmhfemukqy@apteco.msgfocus.com>

Edit campaign options

**Mailing List**

FERGE Test Initial List\_2018... 7

Change List [More data options...](#)

**Testing**

Send a test email

to simon.holderness@apteco.com

[More test options...](#)

Spam Check Link Check

**Launch**

Campaign is ready for launch.

Options ✓

Data ✓

HTML Content ✓


Text Content ?

Test and Launch

HTML Text

Manage HTML Open Preview

View this email



### FERGE Test Initial Message

Hello Example Forename

The initial send seems to be working ok. As you have opened this message you should open confirmation email unless you click on the link below in which case you should confirmation email.


Visit our UK site

Visit our German site

Cheers

Apteco Ltd

If you wish to unsubscribe, please click on the link below.  
Please note this is an automated operation.  
<http://apteco.msgfocus.com/u/1hxnAU0GcH>

powered by  adestra

- Click **Test and Launch** and select step 4 **Setup Launch**
- Select the **Publish Only** tab and click **Publish Campaign**

Apteco > Sandbox > ESP test > Summer Saver Promotion

Launch a Campaign

**Publish Only**

Back to Summer Saver Promotion

1 Spam Check 2 Link Check 3 Test Email 4 Setup Launch

Launch Publish Only

**When to publish your campaign**

Publishing prepares a campaign for launch by detecting links and preparing the message content. Usually, MessageFocus does this automatically before you launch, but there are some situations where you might want to publish manually:

- You have already launched your campaign and you want web version and simple version links to reflect the most recent changes to your campaign.
- This email is triggered as part of a form submission and you would like the email that is sent to reflect the most recent changes to your campaign.
- You have made changes to web analytics profiles and you would like those changes to be reflected in previous launches to this campaign.

Publish Campaign

## Configuring the Export Manager

- Select Export Manager from the Data menu

Sandbox Campaigns Data Files Reports

Search...

Lists Filters Core Tables Data Tables Unsub Lists Export Manager Source Remote Connection Simon Holderness (Apteco) Log out

Apteco > Sandbox > Data > Export Manager

Export Manager

**Exports**

Search table...

ID	Export Name	Type	Owner	Scheduled
1	Apteco_email_response	Event	Adestra Admin	✓ Yes
2	test	Event	Adestra Admin	✗ No
3	Apteco Campaign1	Event	Simon Holderness	✓ Yes
5	AptLIVE Response Export	Event	Simon Holderness	✓ Yes

Download Showing up to 10 20 50 100 rows

**Links**

Create Export

**Support**

Manuals and Videos

support@adestra.com

Chat online

+44 (0)1865 242411

Report a bug

You will need to create a custom export using the following fields for the FastStats Response Gatherer.

