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
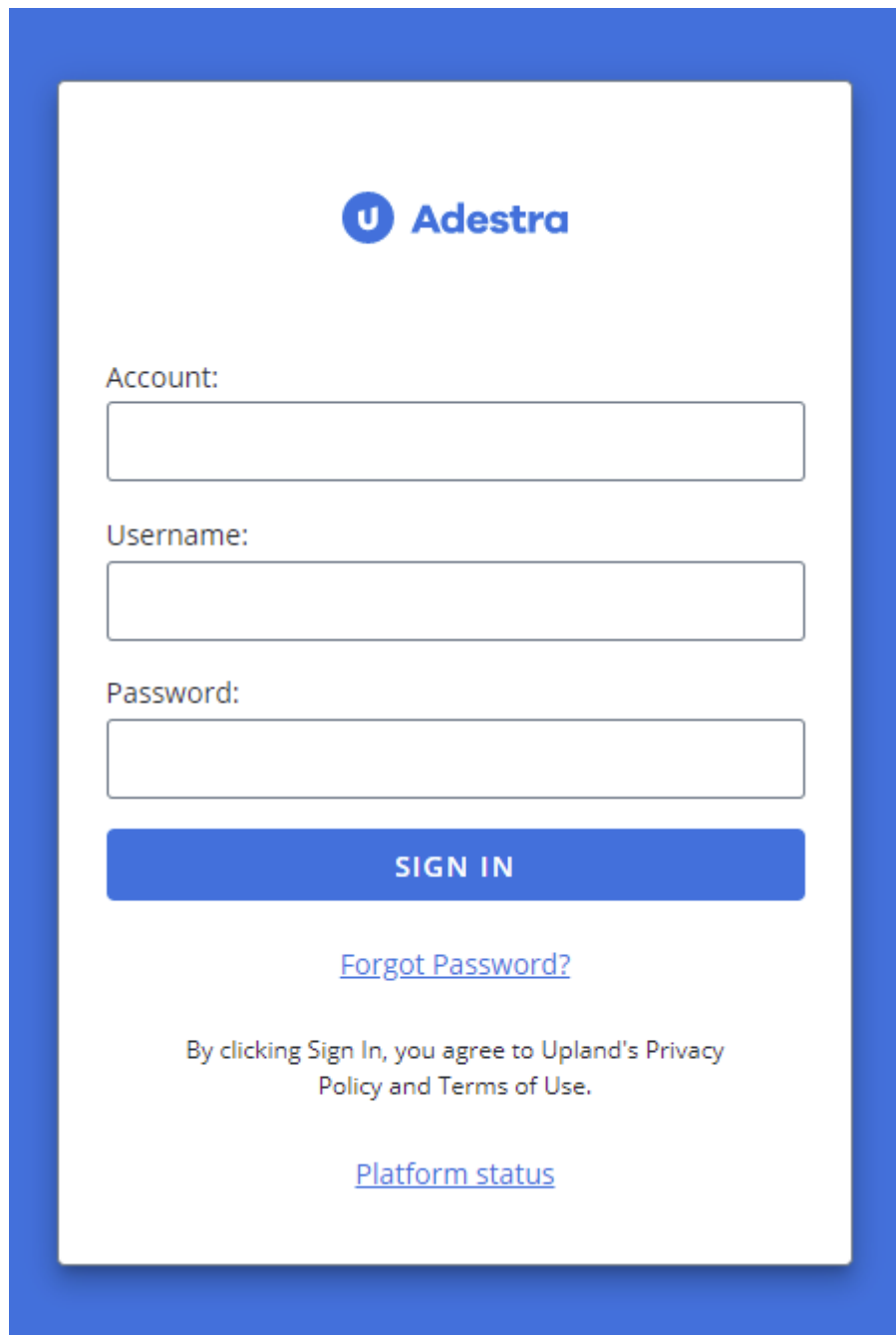
Upland Adestra Configuration

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

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

Aa Field	≡ Description
email	Active email address***** (Dedupe field in Settings)
person_urn	
forename	Contact's forename
surname	Contact's surname
title	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

Aa Field	≡ Description
Communication_key	Active email address***** (Dedupe field in Settings)
subject	
fergecontent	Contact's forename
Run_number	Contact's surname

These will be specific to your account

Setting up a Campaign in Upland

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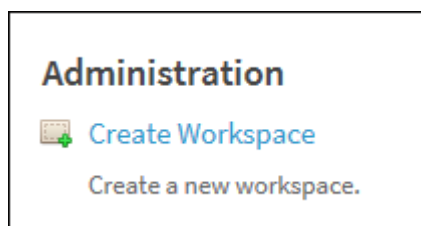
The Create Workspace page opens

- 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.
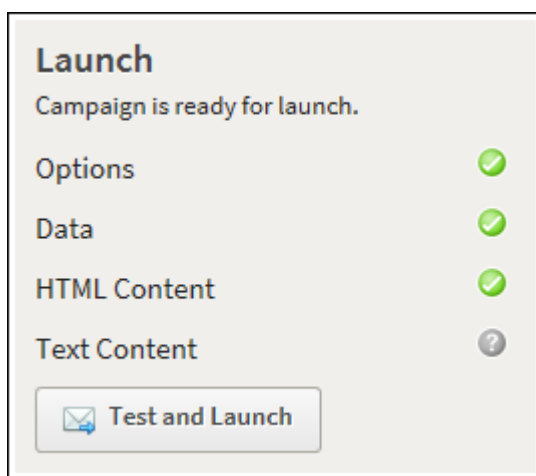
For example, you will also need to specify a List

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

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

- 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) ⓘ

Summer Promotion

Description ⓘ

Summer Promotion Message

Colour ⓘ

B2CDDD

Owner (required) ⓘ

Simon Holderness   Select User

Tags

Save

Once complete, click **Save**

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

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.

- 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.

- Click **Test and Launch** and select step 4 **Setup Launch**

- Select the **Publish Only** tab and click **Publish Campaign**

Configuring the Export Manager

- Select Export Manager from the Data menu

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

Campaign Name Export	Table
email	Core Table
person_urn	Core Table
communication_key	Data Table
launch_id	System Table
campaign_id	System Table
campaign_name	System Table
event_name	System Table
timestamp	System Table
link_label	System Table