Apteco Technical Guide

Apteco Integrations Salesforce Setup Guide

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

A bit about the broadcaster

> 💡 Salesforce was formerly called ExactTarget

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 Salesforce 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 Salesforce

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 Salesforce UI URL **Username** and **Password** to log in to the Salesforce Marketing Cloud

- The Salesforce Message name (available from the Salesforce UI)

- The Salesforce API Username and Password

- The Salesforce **File Transfer Location** - Recommended "ExactTarget Enhanced FTP"

- 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:// 0f4wbzr4nlfsslwi2u612psbpg7g.rest.marketingcloudapis.com/

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- The API URL in the format - e.g. https://webservice.exacttarget.com/Service.asmx Check with Salesforce

- The ***Sender Profile Code/s** to associate with a broadcast in Apteco

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 **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
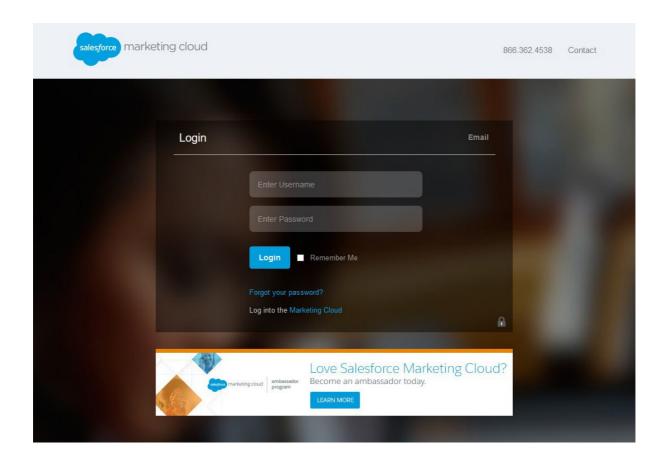
Salesforce Configuration

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:

- Login to your Salesforce account to access the web-based control panel
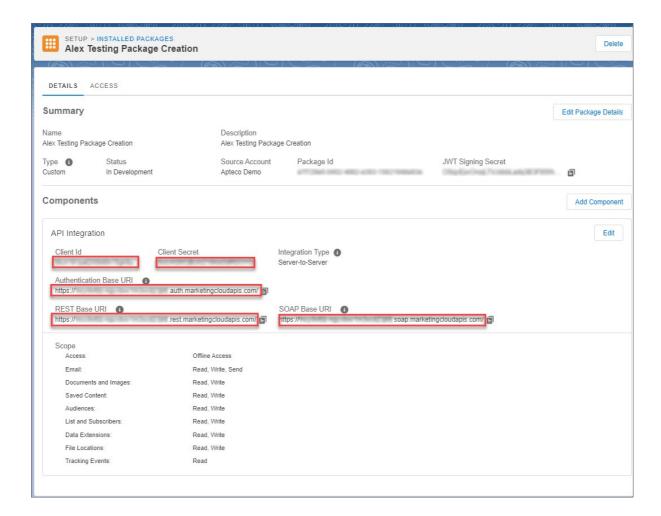
Settings in Salesforce

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
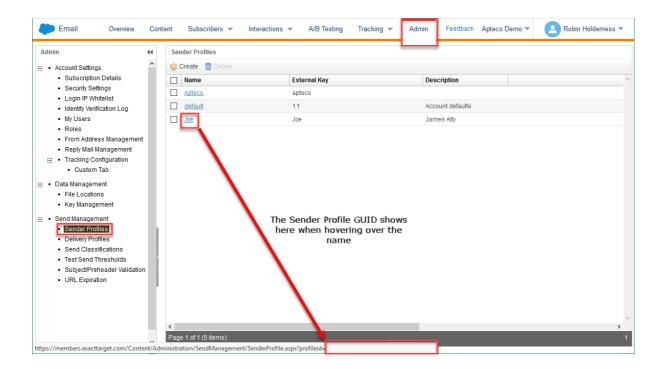
Installed Packages page

Additional Settings

See the other areas in the Salesforce Marketing Cloud for additional settings Table 9 –Other Settings
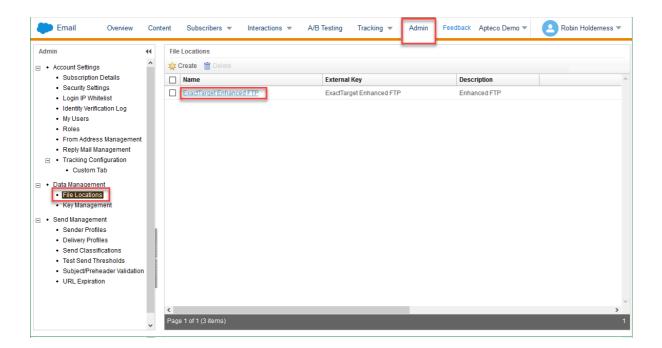
Sender Profile

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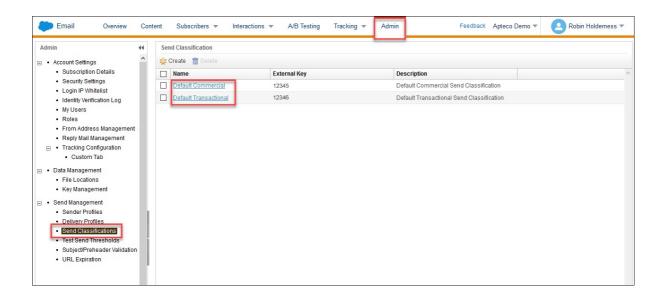
Hover over the name of the sender.

The Sender Profile GUID shows here when hovering over the name

https://members.exacttarget.com/Content/Administration/SendManagement/SenderProfile.aspx?profileid=

File Transfer Location
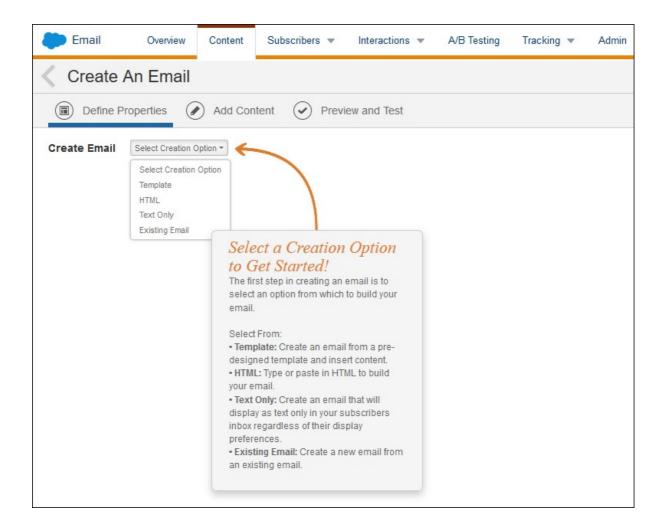
See the **Admin** menu **File Locations**

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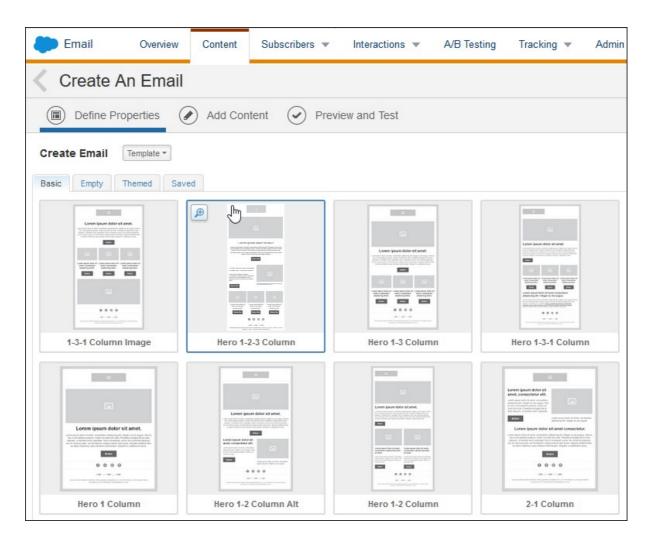
See the **Admin** menu **Send Classifications**

Set up Messages and Templates using Content Builder in Salesforce
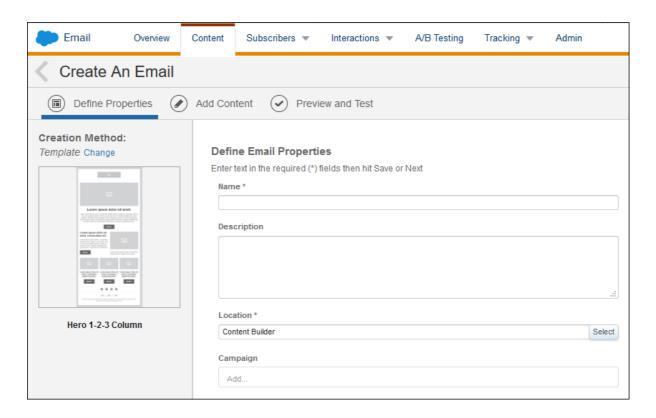
- From: *Content*

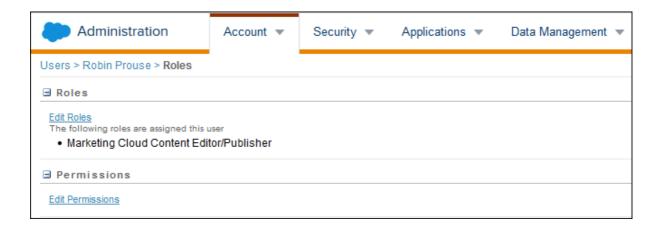- You can either create a Message or a Message Template.

- Using the wizards, you can define the static/dynamic content and the style of the emails.
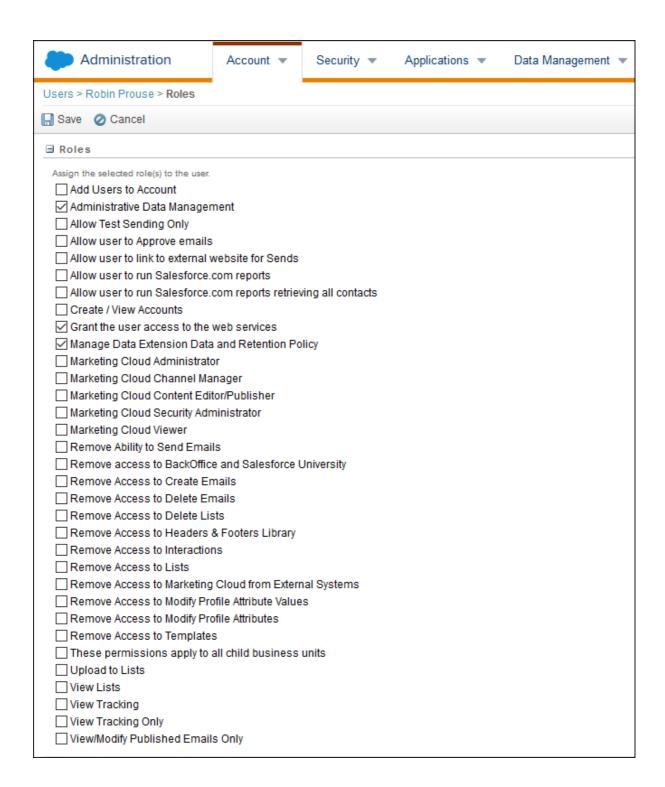
Assigning Roles to FastStats Users in Salesforce

- Log into Salesforce, Click the dropdown on the username on the right-hand side and choose Administration

- From the Account menu choose Users

- Put a tick next the user that is being used to authenticate

- Click Manage Roles

- Click **Edit Roles**

- Ensure the following roles are assigned

Copy of Broadcasting Roles

⊘ Required	A⃰a Role
Yes	Grant the user access to the web services
Yes	Administrative Data Management

Required	Role
Yes	Manage Data Extension and Retention Policy