

Apteco Technical Guide



Apteco Integrations Optimizely Setup Guide

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

A bit about the broadcaster



Optimizely was formerly called **Episerver** and before that **Optivo**

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 Optimizely 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 setup document.

Note:

We take care to keep 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 Optimizely UI URL **Username**, **Password** and **PIN** to log in to your broadcaster
- The Optimizely List Name and Message Name (available from the Episerver UI)
- The Optimizely API Username and Password
- The Optimizely Client ID

Optimizely Configuration

Note:

If you wish to automatically broadcast the list to a message from Apteco, you need to create a message within Optimizely using a Smart Campaign.

- Login to your Optimizely account to access the web-based control panel

The image shows a login form with a yellow background. It contains the following elements:

- User Name:** A text input field.
- Password:** A text input field.
- PIN:** A section with four input boxes, each followed by a grey box containing a black dot. Below this is a text prompt: "Enter the two digits of your PIN in the blank fields using the virtual keyboard."
- Virtual Keyboard:** A row of buttons for digits 7, 3, 4, 2, 6, 5, 8, 0, 1, 9. Each digit button has a small checkmark icon. To the right is a "Clear" button.
- Forgot Password or PIN:** A link centered below the keyboard.
- Log In:** A large blue button.
- Language Selection:** A row of links: Deutsch, English, Polski, Nederlands, Français.
- Footer Links:** External Login | Imprint | Help.

Note:

The following items are required in Episerver:

Recipients

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

Recipients List in Optimizely

Recipient Overview

Recipient List

Target Group

Text Search

Warenkorbabbruch

Apply

Recipients

Urn	Email	Broadmail ID	Wave ID	Salutation	Title	First Name	
456789	florian.von.bracht...	unknown	unknown	Herr		Florian	

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Displaying 1 to 1 of 1 items

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Create Recipient...

Edit Recipient...

Delete Recipient

Block Recipient

- **Import Recipients** wizard – **Row Mapping** Step

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Import Recipients

Start Recipient list Row Mapping Import options Import

Set Mapping

To ensure that your data is imported correctly (first name into field "first name" etc.), allocate each field in the recipient list

FIELDS IN RECIPIENT LIST	FIELDS IN FILE	DEFAULT COUNTRY CODE/FIXED VALUE
Urn	<input type="text" value="Urn"/>	
Email	<input type="text" value="Email"/>	
Salutation	<input type="text" value="Salutation"/>	<input type="checkbox"/> Fixed value
Title	<input type="text" value="Title"/>	<input type="checkbox"/> Fixed value
Firstname	<input type="text" value="Firstname"/>	<input type="checkbox"/> Fixed value
Lastname	<input type="text" value="Lastname"/>	<input type="checkbox"/> Fixed value
Message	<input type="text" value="Message"/>	<input type="checkbox"/> Fixed value
Discount	<input type="text" value="Discount"/>	<input type="checkbox"/> Fixed value
Communication Key	<input type="text" value="Communication Key"/>	<input type="checkbox"/> Fixed value

• Import Recipients wizard – Import Options Step

Import Recipients

Start Recipient list Row Mapping Import options Import

Select import type

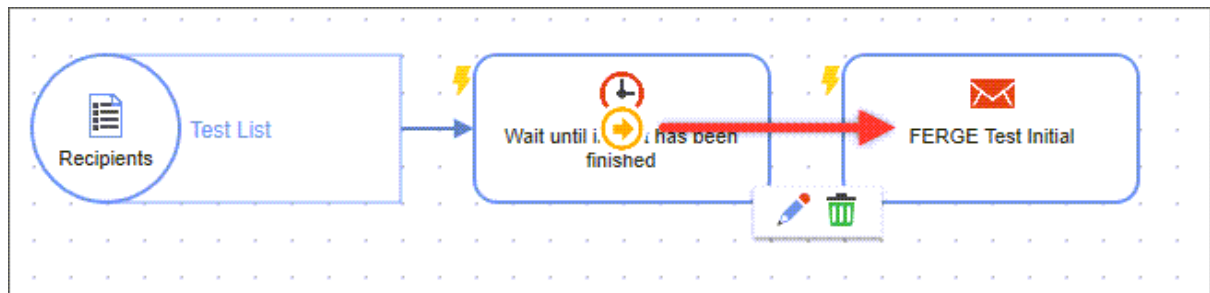
- ☐ **Simple Import**
Activate this option to add new recipients without updating old ones.
- ☒ **Import new recipients and update existing records**
Activate this option to add new recipients to your list and update existing records if they were changed (e.g. a new address).
- ☐ **Update only**
Activate this option to update changed records. No new recipients are imported even if the imported list contains new recipients.
- ☐ **Clear recipient list before importing**
Activate this option only to import your complete mailing list/database. All existing records will be deleted before importing the new records. Do not use this option if you want to add records to your list.

Set import options

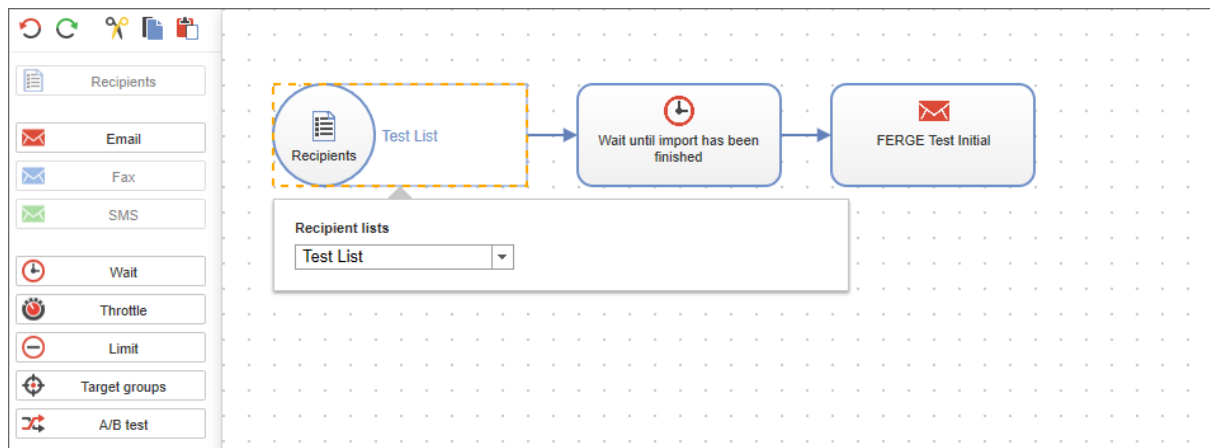
- ☒ **Skip first row**
Activate this option if the first row of your file contains the headlines to the respective columns (i.e. "email address" instead of "john.doe@example.com"). This prevents the first row from being imported.

Smart Campaign

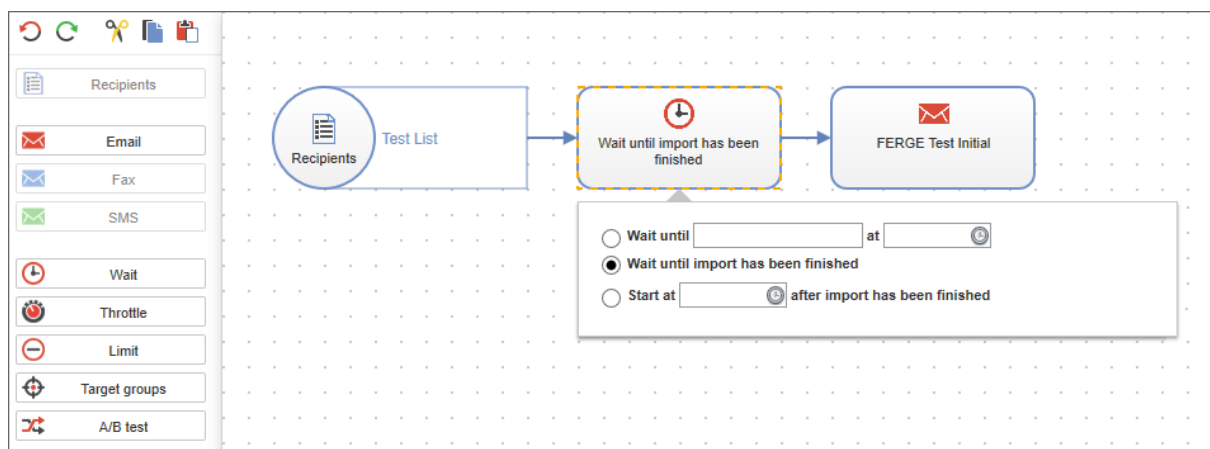
- Create a Smart Campaign with the following minimum items



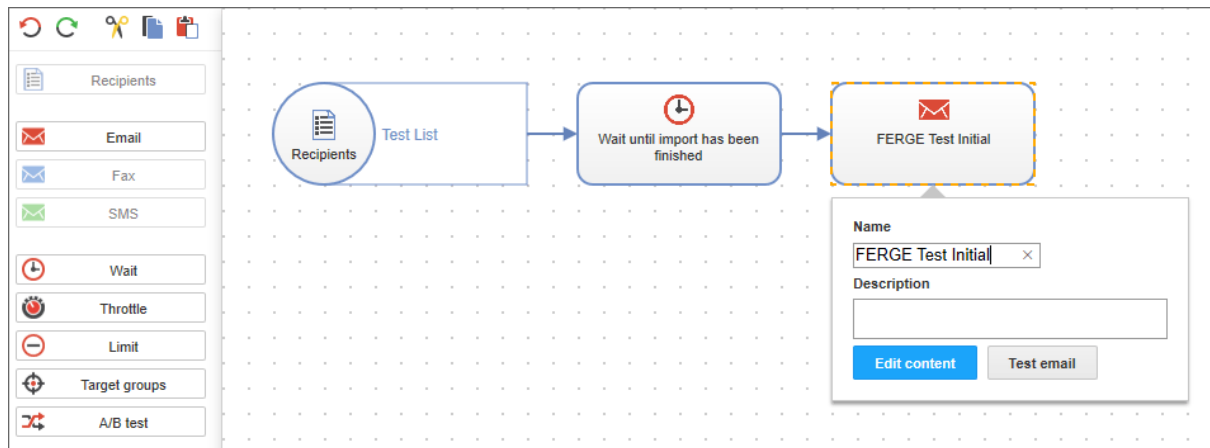
- Connect the steps
- Recipients – Select the list to use



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



Message – Create an Email message and personalise



Note:

You can migrate Classic Mailings to a Smart Campaign

Tip

The Smart Campaign name is the **Message** name used in Apteco