

Apteco

# **Technical Guide**

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

Elaine Integration Guide D052T3X004 – November 2019

### **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 May 2018

Updated D052T3X004 - November 2019

Updated November 2019 - Elaine API Key broadcasting parameter added to document

# Contents

1	Introduction1						
	1.1	Summary of Elaine® functionality	1				
	1.2	efore You Begin2					
2	Pro	cess Summary					
-	2.1	Architecture					
	L.,		0				
3	Apt	eco System Configuration	5				
	3.1	Creating the Response Database	5				
	3.2	Linking the Response Database to the FastStats Service	9				
	3.3	Installing the Email Response Gatherer					
	3.4	Creating the Response Gatherer Folders					
	3.5	Creating the Configuration File	15				
	3.6	Scheduling the Response Gatherer	17				
4	Fas	tStats Broadcasting & Responses	20				
	4.1	Enable Email Broadcasting					
	4.2	Configuration in FastStats					
	4.3	Checking your configuration2					
	4.4	Email Responses Wizard					
5	Рес	pleStage Broadcasting & Responses	33				
	5.1	Defining the Broadcast Channel in PeopleStage					
	5.2	Broadcasting in PeopleStage					
Арре	endix	A: Elaine <sup>®</sup> Configuration					
Арре	endix	B: API Parameters	43				
Арре	endix	C: Example Batch File	46				
Арре	endix	CD: API Methods and Calls	48				
Арре	endix	E: Troubleshooting	49				

# **1** Introduction

This integration guide details the processes required to integrate the Apteco Marketing Suite with the Elaine<sup>®</sup> 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 Elaine<sup>®</sup>. Use of the Apteco Marketing Suite in combination with Elaine<sup>®</sup> 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 Elaine® functionality**

### Technology

Elaine<sup>®</sup> integrates with your FastStats system by utilising a RESTful transport over HTTP/S, in conjunction with SFTP.

### Supported Integrations

Elaine<sup>®</sup> supports all the above integration options.

#### Note:

SMS is also available, if you need to use SMS please contact Apteco Support.

#### Type of Integration – User Defined

Elaine<sup>®</sup> is a User Defined integration meaning you can select variables at run time and create a personalised output based on specific requirements.

### 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 Elaine<sup>®</sup>. You will also need to understand how to construct your message in Elaine<sup>®</sup>.

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 Elaine®
  - b. API Parameters

You need to configure Elaine® 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

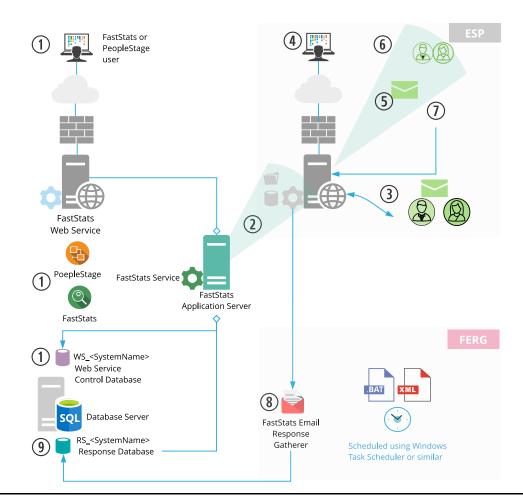
- Decide where you want the FastStats Email Response Gatherer to be installed This will typically be on the same PC as the FERG folders but can be on any PC
- The Elaine<sup>®</sup> API Username and Password
- The Elaine<sup>®</sup> Message Name

# **2 Process Summary**

### 2.1 Architecture

The following diagrams describe a typical process from FastStats to Elaine<sup>®</sup>, to the customer and back to FastStats.

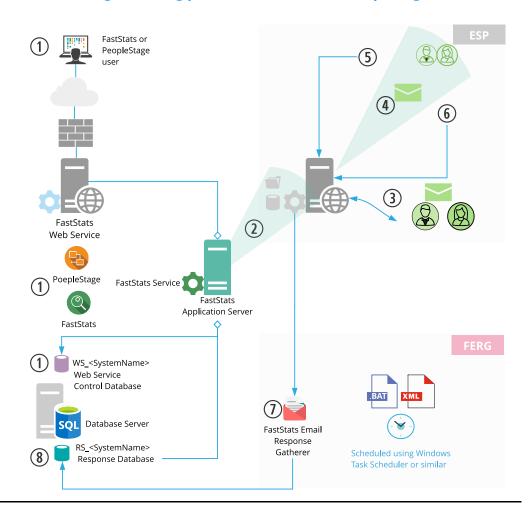




- 1. A broadcast is initialised through the FastStats Web Service using the Email Broadcasting Wizard, which inserts a job into the Web Service Control database (WS\_DB).
- 2. The FastStats Service picks this job up, uploads the list to the Elaine<sup>®</sup> SFTP site and then uses RESTful communication to monitor the upload.
- 3. Elaine<sup>®</sup> 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 Elaine<sup>®</sup> web interface.
- 5. Elaine<sup>®</sup> sends Messages to all recipients on the list.
- 6. Elaine<sup>®</sup> records any undelivered messages.

- 7. Elaine<sup>®</sup> 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 Elaine<sup>®</sup> 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 Elaine®.

## **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.

FastStats.NET Con	figuration (32 bit)	- • •
File Help		
	FastStats.NET C	Ŭ
	Please choose a config	guration area :
	Web Servio	ce
	Database Mana	gement
	FastStats Sen	vices

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** 

Database Server :	TDXPS8930DT\SQLEXPRESS	
	Windows Authentication	
Usemame :		
Password :		
	Test Con	nectio
	Test Database Connection X	
	Connection succeeded	
	ОК	

### 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.

🗾 Create Database	fizard	-		×
Step 2 - Additional Inf	mation			
System name :	Holidays			
Default password :	•••••			_
			Back	Ne

Install	Component	Database Name	Notes
	Configuration	FS_Config	Database already exist
	Control	WS_Holidays	Database already exist
$\checkmark$	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	

6. Select the Email Response check box, then click 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.

Create Databa	se Wizard	_		
0				
Step 4 - Review a				
Parameters :				
<coi< th=""><th>figuratorbuild&gt; = 17313</th><th></th><th></th><th></th></coi<>	figuratorbuild> = 17313			
	password> = fa5t5tat5!			
<sys< td=""><td>temname&gt; = Holidays</td><td></td><td></td><td></td></sys<>	temname> = Holidays			
	location> =			
	log_location> =			
<res< td=""><td>ponsedb&gt; = RS_Holidays</td><td></td><td></td><td></td></res<>	ponsedb> = RS_Holidays			
Run	script : Create Response Database.sql			
				_
			Back	N

### 8. Click **Run Scripts**.

🖉 Create Database Wizard			-		Х
Step 5 - Create Database(s)					
Email Response	View Notes	Copy Script	View Log		
			Run Scrip	ts Car	ncel
				Back	Next

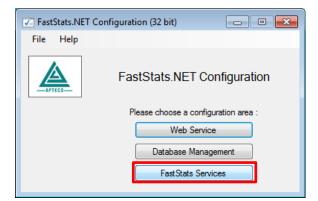
### 9. Click Finish.

Create Database Wizard	_		×
Step 5 - Create Database(s)			
Email Response Complete View Notes Copy Scr	ipt View Log		
	Run Scri	ipts Ca	ancel
		Back	Finish

### 3.2 Linking the Response Database to the FastStats Service

You need link the response database to the FastStats service.

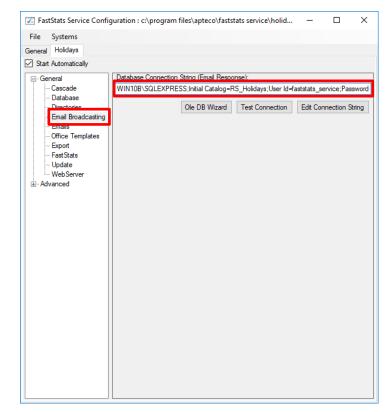
- 1. Open the FastStats Configurator
- 2. Select FastStats Services



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

FastStats.NET Services	Manager		_			Х
Manage Services						
Name	Status	Version	Query Component Version		St	art
FastStats Service - Holidays	Running	1.3.17313.70 (Q4 2017)	5.6.2.18037		St	ор
					Rea	start
					Refree	sh (F5)
						late
					Prop	erties
					Viev	v log
<				>	Licer	nsing

 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

Database Con	nection String (Email Response):	
	Ole DB Wizard Test Connection	Edit Connection String
	Database Connection	×
	Connection to email response database su	ccessful.
		ОК

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 Elaine<sup>®</sup> server through port 443, see the example URL below; this may vary with your account: nr23.elaine-asp.de

### 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 folder.

1. Click Next.

🖟 FastStats Email Response G	🕼 FastStats Email Response Gatherer x64 Setup 🦳 — 🗌 🗙			×
<b>≥</b>	Welcome to the FastStats Gatherer x64 Setup Wiza		Respo	nse
	The Setup Wizard will install FastStat Gatherer x64 on your computer. Clic Cancel to exit the Setup Wizard.			or
	Back Nex	ĸt	Cano	el

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

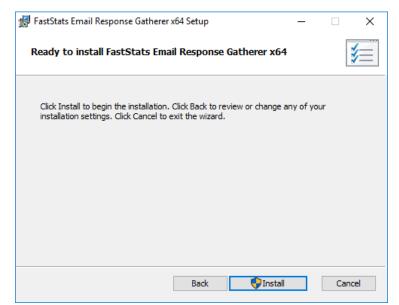
🔀 FastStats Email Response Gatherer x64 Setup - 🗆 🗙
End-User License Agreement
Please read the following license agreement carefully
FASTSTATS END USER LICENCE AGREEMENT
This Licence Agreement is between Apteco Limited ('Apteco' or
in the appropriate context 'we', 'us' or 'our') and the user ('you'
or in the appropriate context 'your') of the FastStats software
('Software').
The copyright and intellectual property in the Software is owned
by Apteco. We offer you a non-exclusive and non-transferable
☑ I accept the terms in the License Agreement
Print Back Next Cancel

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

😸 FastStats Email Response Gatherer x64 Setup	_		×
Destination Folder		Γ	1
Click Next to install to the default folder or click Change to choo	se another.		<b>%</b>
Install FastStats Email Response Gatherer x64 to:			
			_
C: \Program Files \Apteco \FastStats Email Response Gatherer x6	4\		
Change			
Back	Next	Can	cel

### 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

🙀 FastStats Email Response Gatherer x64 Setup				×
<u>ال</u>	Completed the FastStats Gatherer x64 Setup Wiza		Respon	ise
	Click the Finish button to exit the Set	up Wizard	Ι.	
	Back Finis	sh	Cano	el

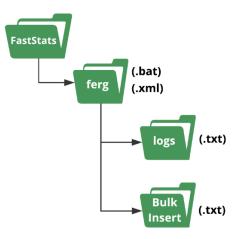
### 3.4 **Creating the Response Gatherer Folders**

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 Gat	herer
----------------------------	-----------------------	-------

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 Elaine<sup>®</sup> from the Broadcaster drop-down list
- 3. Enter the Username and Password to use with the Elaine® 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	—		$\times$
File Help			
Database			
Connection string : =RS_Training1;User Id=faststats_service;Passw	rd-fa5t5	at5!;	Edit
Timeout (secs) : 1200		÷	Test
Bulk insert folder :			Browse
Send Email on Error SMTP Properties			
PeopleStage connection string :			Edit
Email Broadcaster			
Broadcaster : Elaine			~
Usemame :			
Password :			
Broadcast Parameters			
ADDITIONALFIELDS		~	Add
Parameter Value			
<pre>FTPURL ftp://{USERNAME}:{PASSWORD}@ftpsite/up</pre>	load		
•			
This should refer to the ftp location (including usemame and password) where your generated.	Elaine res	ponses a	are
Missing required parameter(s) : APIBASE, APIPROTOCOL, FILEPATTE	RN		

#### Note:

The Email Response Config application displays a warning message about required parameters until you have included them all.

### 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 Elaine®

### Email Response Config dialogue with ADDITIONAL FIELDS completed

📕 Fast	Stats Email Response G	atherer	- 0	$\times$
File	Help			
Databas	se			
Connect	tion string :	=RS_Training1;User Id=	faststats_service;Password=fa5t5tat5!;	Edit
Timeout	: (secs) :	1200	▲ ▼	Test
Bulk ins	ert folder :			Browse
Send	d Email on Error	SMTP Properties		
PeopleS	Stage connection string :			Edit
Email Br	roadcaster			
Broadca	aster : Elaine			~
Useman	ne:			
Passwo	rd :			
Broadca	ast Parameters			
	ONALFIELDS			<ul> <li>✓ Add</li> </ul>
				7.00
	Parameter		Value	0.54
P	FTPURL		<pre>ftp://{USERNAME}:{PASSWORD}</pre>	ert
	PEMPRIVATEKEY FILEPATTERN			
	EMAILCOLUMNNAME		responses* EmailAddress	
	DELIVERYDATECOLUM		EventDate	
	CLICKURLCOLUMNNAM		Event Data	
	EVENTTRIGGEREDDAT		EventDate EventDate	
	DATEFORMAT	ECCEUMININAME		
	COMMUNICATIONKEYC	OL UMNNAME	уууу-MM-dd HH:mm:ss	
	TREATMESSAGENAMEA		false	
	APIBASE		nr93.elaine-asp.de	
	APIPROTOCOL		https	
This of	land and an to a first f		d a second where we plates	
This sho generate		n (including usemame an	d password) where your Elaine response	s are

See **Appendix A** Email Response Gatherer Parameters for a full list of available parameters to use with the Email Response Gatherer.

Note: Use "Quote" for the Encloser parameter with Elaine<sup>®</sup> version 6

### 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

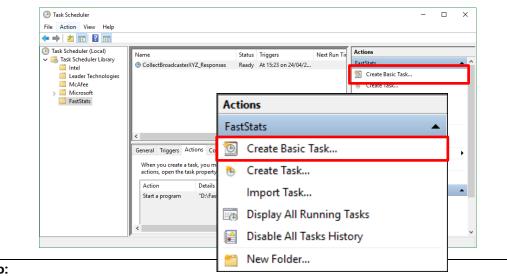
### Тір

Search for Task in the Start Menu

	▣ □ ⊕	Filters $\checkmark$
	Best match	
0	Task Scheduler Desktop app	
	Apps	
	😡 Task Manager	
	Search suggestions	
	✓ Task - See web results	>
٢		
2		
-	P Task Scheduler	

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

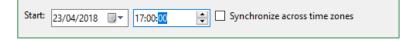
Create Basic Task Wizard	I		×
Create a Bas	sic Task		
Create a Basic Task Trigger		d to quickly schedule a common task. For more advanced options or setting ple task actions or triggers, use the Create Task command in the Actions pan	
Action	Name:	CollectBroadcasterXYZ_Responses	
Finish	Description:	Scheduled Response Collection for XYZ	
		< Back Next > Canc	

### 4. Task Trigger step

### a. Select the Trigger interval

Create Basic Task Wizard				×
Task Trigger				
Create a Basic Task Trigger One Time Action Finish	When do you want the task to start? Daily Weekly Monthly One time When the computer starts When I log on When a specific event is logged			
		< Back	Next >	Cancel

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



### 5. Action step

a. Select Start a program and click Next

Create Basic Task Wizard			×
Or Action			
Create a Basic Task Trigger	What action do you want the task to perform?		
One Time			
Action	<ul> <li>Start a program</li> </ul>		
Finish	<ul> <li>Send an e-mail (deprecated)</li> </ul>		
	<ul> <li>Display a message (deprecated)</li> </ul>		

- 6. Start a Program Step
  - a. Click **Browse** then navigate to the folder containing your batch files, select the file to use and click **Open**
  - b. **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.

Create Basic Task Wizard				×
5tart a Program				
Create a Basic Task Trigger	Program/script:			
One Time	"D:\FastStats\FERG\Example Batch.bat"			Browse
Action	Dr.(raststats(rEito)Example batch.bat			
Start a Program	Add arguments (optional):		Example.xm	
Finish	Start in (optional):			
		< Back	Next >	Cancel

7. Summary step – Click Finish

Create Basic Task Wizard			Х
5 Summary			
Create a Basic Task			
Trigger	Name:	CollectBroadcasterXYZ_Responses	
One Time	Description:	Scheduled Response Collection for XYZ	5
Action	beschption		
Start a Program			
Finish			
	Trigger:	One time; At 15:23 on 24/04/2018	٦
	Action:	Start a program; "D:\FastStats\FERG\Example Batch.bat" Example.xml	
	Open the	Properties dialog for this task when I click Finish	
	When you cli	ck Finish, the new task will be created and added to your Windows schedule	
		< Back Finish Canc	el

# 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

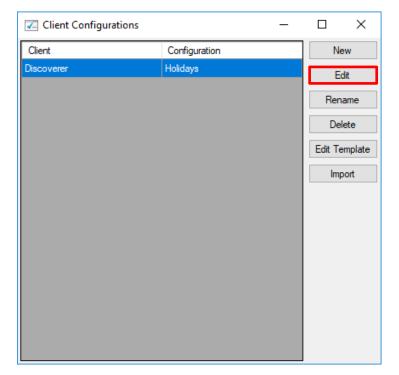
🖉 FastStats.NET Configuration (32 bit)							
File Help							
FastStats.NET Configuration							
Please choose a configuration area :							
Web Service							
Database Management							
FastStats Services							

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

Web Service Chooser	×
Web service configuration	
••••••	Edit
	OK Cancel

#### 4. Click Client Configuration

	X
View log	
Check con	fig
Client Configu	ration
Client Binar	ies
	Uiew log Check con Client Configu Client Binar



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** 

ieneral	Appea	rance	Restrictions	Support	Plugins	Launcher	Network	Debug	Telemet	iry	
Plugins								_			
	Enable	Plug	in Name								
	~	Apteo	co.Discoverer	.Plugins.	Cascade						
	~	Apteo	co.Discoverer	.Plugins.	Cluster						
	<b>~</b>	Apter	co.Discoverer	Plugins.	DecisionT	ree					
		Apteo	co.Discoverer	Plugins.	ExternalLi	nks					
		Apteo	co.Discoverer	Plugins.	Licensing						
		Apteo	co.Discoverer	Plugins.	Linkage						
	~	Apteo	co.Discoverer	Plugins.	Мар						
	<b>~</b>	Apteo	co.Discoverer	Plugins.	Modelling						
	<ul><li>✓</li></ul>	Apteo	co.Discoverer	Plugins.	ModelRep	ort					
	~	Apteo	co.Discoverer	.Plugins.	Profile						
		Apteo	co.Discoverer	.Plugins.	SimpleMo	delling					
	<b>~</b>		co.Discoverer	_							
			co.Discoverer	-							
	<b>v</b>		co.Discoverer			iable					
	<b>V</b>	-	co.Discoverer								
►	<b>V</b>		co.Discoverer.					J			
			co.Discoverer	-							
			co.Discoverer	-		Dynamics					
			co.Discoverer								
			co.Discoverer			ctions					
			co.Discoverer	-							
			co.Discoverer	-		d					
	▼		co.Discoverer	-	-						
			co.Discoverer	-	-						
			co.Discoverer	-		-					
		Apteo	co.Discoverer	.rugins.	Storyboar						

### 4.2 **Configuration in FastStats**

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

4	Å Users			џ
	$\mathcal{C} \land \mathcal{A}$	7 Filter	r • Å	
Ë	Name		Reference	
(ystem	Þ 📩 Glo	bal	-1	
	New	•		
	Cut			
	Сору			
	Paste			
	Delete	_		
	Rename Modify			
	Modily	•	Modify Group Modify User	
6				
			Modify Access Rights	
Ŵ			Modify Disk Quotas	
Windows			Modify Ftp Connections	
Ň			Modify Selection Properties	
			Modify Outputs	
ជ			Modify Transferable Extensions	
			Modify Product Options	•
			Modify Plugin Configurations	_
Favourites			Modify Row Filters	
NOVE			Modify Column Filters	
Ξ.			Modify Roles	
			Modify Hyperlinks	
Â			Modify Velocity Modify Capabilities	•

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

Modify Plugin Configu	rations				
Tool (20 items)				<b>•</b>	
Wizard (28 items)					
Plugin	*		Inherit		
Aggregation		Edit	$\checkmark$		
Assign Values		Edit	$\checkmark$		
Basket Analysis		Edit	$\checkmark$		
Best Next Offer		Edit	$\checkmark$		
Calculate Expression		Edit	$\checkmark$		
Cluster Model		Edit	$\checkmark$		
Combine Categories		Edit	$\checkmark$		
Count		Edit	$\checkmark$		
Create And Update		Edit	$\checkmark$		
Create From Cube		Edit	$\checkmark$		
Date Banding		Edit	$\checkmark$		
Decision Tree Model Output		Edit	$\checkmark$		Clea
Drive Zone		Edit			
Email Broadcasting (Predefined Fields)		Edit			
Email Broadcasting (User Defined Fields)		Edit			
Email Responses		Edit	$\checkmark$		
Import Data		Edit	$\checkmark$	-	

3.	Click Add	to	add	а	new	template
----	-----------	----	-----	---	-----	----------

Email Broad	Icasting	×						
Name	Email Broadcasting							
Tooltip Text	Upload selected records to your chosen Email Service Provider							
Image Path	images\EmailBroadcastingWizard.jpg							
Group	Output Wizards Order Within Group							
	Group Order							
	Name							
Templates								
		-						
	Add							
	OK Cancel							

4. Enter a **Name**, select the appropriate **Resolve Table** from the drop-down and select **Elaine**<sup>®</sup> from the Broadcaster drop-down.

lame:	Template	
Elaine		
esolve People xtras:	aster:	
Elaine	•	
nown	Parameters:	
Арі В	lase	
ed92	2.elaine-asp.de *	
http:	rotocol s /ersion2 *	
dditio	nal Parameters:	
	Key	Value
*		
arame		
		"AniVersion=2"LiseDatedList=True/DatedListFormat=vvv/MMdd- Darse
Артва	se-custiciane aspiac, April totocor-inq	;ApiVersion=2;UseDatedList=True;DatedListFormat=yyyyMMdd- Parse

### Note:

Scroll to enter the Known Parameters information, \* indicates a required parameter.

Complete the template parameters form with the required settings for your Elaine<sup>®</sup> account.

Parameter	Settings to use
Api Base	nr23.elaine-asp.de*
Api Protocol	https
Api Version	*This refers to the Elaine API Version either 1
	or 2.
Use Dated List check box	Selected (default)
Dated List Format	yyyyMMdd-HHmmss
FTP Protocol	sftp
FTP Username *	ed22* (blank by default)
FTP Password *	ed22* (blank by default)
FTP URL	nr23.elaine-asp.de/upload*
Upload Empty Lists	Selected (default)
Private Key Path	C:\\elaine-nopassword.ppk (blank by
	default) * (only relevant if using a private key
	on the FTP site)
Mailing List Retention Period (days)	0
Elaine Urn Field Name	Urn (blank by default) *
Elaine Email Field Name	Email Address (blank by default) *
Elaine Sms Field Name	(blank by default) *
Elaine Communication Key Field	(blank by default) *
Name	
Append Email to Urn	Cleared (default) This ties into the Email
	Response Gatherer and allows the retrieval of
	the email address
Max Import Wait Time	300 (default)
Message Preview Group Name	(blank by default)
Encoding	Default

### Table 3 – Edit Template Known Parameters Settings

### Note:

\*These settings will be specific to your Elaine<sup>®</sup> account.

### Note:

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

### 4.3 Checking your configuration

You can test the configuration by creating a Data Grid and using the email Broadcast Wizard; this will send a message to the people in your selection.

### Note:

You must set up a message in Elaine<sup>®</sup> before performing this step see **Appendix A Configuring Elaine**<sup>®</sup>.

1. Create a **Data Grid** based on the appropriate selection criteria and drag on the variables that you want to pass to Elaine<sup>®</sup> (one must be an email address)

New Selection 3	
III Summer List	People
🕛 🕞 🗍 🗒 Notes 📲 🗮 🗮 🖓 🔤 🖓	
	Add User Code 🔹 🏭 Rows To Browse 🔹 🕅 🕶 💽 🔹
Data Grid *	<b>Ψ</b> ×
Grid	Chart
Drag a column header here to group by that colu	mn.
Person URN # Title # Initial # Surname # Ema	I Address 🕸
I	×
Cover Selection * Data Grid *	

### 2. Click the Email Broadcasting icon

III Summ	ner List		/	Peo	pple
P <sup>™</sup> Export			Aggregation		de 🗸 🏭 Rows To Browse 🗸 🕅 🕈 🕅 🕈 📑 🗸
Data Grid		Grid			7 Chart
Drag a colum	n header	here to g	roup by tha	t column.	
Person URN #	Title +	Initial 🕫	Surname 🕸	Email Address 翊	
EllieHolderness	Miss	E	Holderness	ellie.test@bubb	
Jessica Holder	Mrs	J	Holderness	jessica.test@bu	
RileyHoldern	Mr	R	Holderness	riley.test@bubb	
RobinHolder	Mr	R	Holderness	robin.holdernes	
JaneHolderne	Mrs	J	Holderness		
SimonHolder 1	Mr	ç	Holderness	simon holderne	
					Browsing first 1,000 People
over Selection	Data Gr	id			

The Email Broadcasting Wizard opens

3. Choose the Elaine® template from the drop-down list and click Next

#### Note:

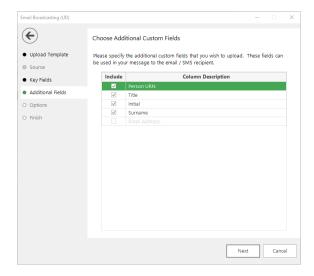
The wizard will omit this step if you have only one Upload Template

Email Broadcasting (UD)	- 0
	Choose Upload Template
Upload Template	This wizard uploads a selection to your email broadcaster. Select the upload templat
Source	that you wish to use using the drop down list below.
O Key Fields	You can get a detailed description of the template by selecting and reading the
O Additional Fields	information below.
O Options	Elaine -
O Finish	
	Next

4. Choose the email field and click **Next** 

Email Broadcasting (UD)			_		×
cinal broadcasting (65)					~
¢	Choose Key Fields				
Upload Template     Source     Key Fields	Please specify the key fields for the data that either choose an email address, an SMS phor Select the field that contains the email addres address field then please choose None.	ne number or both.		an	
<ul> <li>Additional Fields</li> <li>Options</li> <li>Finish</li> </ul>	Email Field Select the field that contains the SMS phone r phone number field then please choose None				•
	SMS Field	initial Surname Email Address			
		Next		Cano	el

5. Review the additional fields that will be sent as part of the list and click Next



Email Broadcasting (UD)		×
¢	Email Broadcasting Details	
<ul> <li>Upload Template</li> </ul>	Please enter your credentials for u	ploading your records to the broadcaster.
Source	Username	aptecouser
Key Fields	Password	*****
Additional Fields	Enter the details for this list. If you check the overwrite box.	u want to overwrite an existing list, ensure that you
<ul> <li>Options</li> </ul>	List Name	Summer List
O Finish	<ul> <li>Overwrite an existing list</li> </ul>	
	Message Name	Summer Promotion Q 🗸
	A copy of the list will be saved to t	he directory below.
	Private:\Summer List.csv	Browse
	When the list has been processed confirmation email to the address	and is ready, the broadcaster will send a below.
	Email Address	info@apteco.com
		0%
		Finish Cancel

6. Complete the **Email Broadcasting Details** form then click **Next** 

### Table 4 – EmailResponseGatherer.exe.config Settings

Option	Settings to use
Username	The username for your Elaine® account
Password	The password for your Elaine <sup>®</sup> account
List Name drop-down	Click on the List Name retrieve button and select a list from the drop-down (this appends any new records to the list) or enter a new List Name
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

7. 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	$\times$
2	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?	
	Yes No	

8. 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.

Email Broadcasting (UD)		-		$\times$
e	Results			
<ul> <li>Upload Template</li> </ul>	Wizard Action Complete			
Source				
Key Fields	Your list has been successfully uploaded to your broadcaster. It may them to process this list and make it available to you.	/ take a v	vhile for	
<ul> <li>Additional Fields</li> </ul>				
• Options	Records Uploaded: 1			
Finish				
	Finis	h	Cance	1

### Note:

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

### 4.4 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**

Email Responses	>
	Choose Message
<ul> <li>Message</li> <li>Information</li> <li>Email Variable</li> <li>Folder</li> <li>Add Notes</li> <li>Name</li> <li>Security</li> <li>Finish</li> </ul>	This wizard will show information on the responses to an email broadcast campaign and allow you to create a virtual variable from this information. Please enter the name of the message you want to get information for: Summer Promotion
	Next Cancel

3. As the Email Response Gatherer starts collecting information from Elaine<sup>®</sup>, 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

Email Responses		×
€	Message Response Information	
<ul> <li>Message</li> </ul>	This is the response information for me	ssage:
Information	Sum	mer Promotion
O Email Variable O Folder O Add Notes O Name	Unopened Bounced Opened	- 0 29
O Security O Finish	Clicked through Opted in Opted out	13 7 0
	Would you like to create a variable cor ✓ Create a virtual variable from this inf	
		Next Cancel

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
mail Responses	>
¢	Choose Variable
Message	Please specify the Email or SMS variable that was used to send the message with.
Information	Email Address
Email Variable	
O Folder	
O Add Notes	
O Name	
O Security	
O Finish	
	Next Cancel
	Livext Cancer

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

Email Responses	- D X
€	Choose Folder for Variable
<ul> <li>Message</li> <li>Information</li> <li>Email Variable</li> </ul>	Select the folder where the new variable will be created from the list below.  System Folders  A D ApteconsLIVE
Folder	🗁 Household
<ul><li>Add Notes</li><li>Name</li><li>Security</li><li>Finish</li></ul>	<ul> <li>Person</li> <li>Company Socials</li> <li>Shows</li> <li>Communications</li> <li>Journey History</li> <li>Email Responses</li> <li>Others</li> </ul>
	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

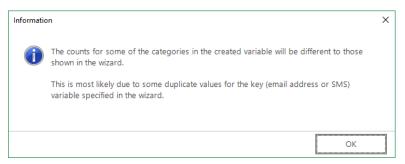
Email Responses		-		×
¢	Add Notes to Variable			
Message     Information	Enter any notes you want to associate with your variable. Your username will automatically be recorded.			
Email Variable				
• Folder				
Add Notes				
O Name				
O Security				
O Finish				
	Nex	d .	Canc	el

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

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** 

Email Responses	– 🗆 X	
¢	Choose Variable Description	
Message     Information	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.	
Email Variable	Description Summer Promotion Response	
• Folder	Alternatively you can choose to overwrite an existing virtual variable with these new values. Drag the variable to be overwritten onto the panel below.	
Add Notes	Drop the variable to overwrite here	
Name		
O Security	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.	
O Finish	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	
	0%	
	Next Cancel	

8. Click **OK** 



9. Click Finish

Email Responses	- 🗆 X
¢	Results
Message     Information	Wizard Action Complete
Email Variable	This wizard has completed performing the requested actions. The effected variable has been highlighted in the System Explorer.
Folder	Records Updated: 38
Add Notes	Codes Updated: 0
Name	If you wish to start a new selection with this variable, check the box below.
<ul> <li>Security</li> </ul>	Show new variable as a selection
Finish	Click 'Finish' to exit this wizard.
	You can also choose to refresh this variable on a schedule. Please press the button below to bring up the schedule editor.
	Update this variable on a schedule
	Finish Cancel

## 5 PeopleStage Broadcasting & Responses

## 5.1 **Defining the Broadcast Channel in PeopleStage**

To use Elaine<sup>®</sup> with PeopleStage, you must set up a channel that defines the settings and parameters and any fields that you always want to send to Elaine<sup>®</sup>.

 Open PeopleStage, select *File > Administration > Channel Editor*. Click Add Email Channel through the context menu within a folder

Add	Add Folder
Copy Channel	Add Email Channel
Paste Channel	Add File Channel
	Add FTP Channel
Import	Add Push Notification Channel
Export	Add Facebook Channel
Delete Channel	Add Twitter Channel
	Add Google Channel
	Add Microsoft Dynamics Channel
	Add SalesForce Channel

2. Enter a name in Channel Name

		Refresh Editor Save & Close
hannel Settings Output Setting	s File Settings Parameter Settings Additional Variable	es Cost Settings
Channel Name:	Email - Elaine	
Allow In Transactional Output:	Never	•
	Test Login	
	Test Broadcast	
	Broadcaster Login	×
	Successfully logged in to broadcast	er
	ОК	

### 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)

<sup>3.</sup> Define Output Settings for Elaine®

		Refresh Editor	Save & Close
Channel Settings Output	Setting	s File Settings Parameter Settings Additional Variables Cost Settings	
Broadcaster:	Elaine		•
Username:	api_ed9	2_1	
Password:	•••••	•••••	
Email Variable			
Variable	Name:	Email Address (PeEmaila)	• Clear
Variable Description Ov	verride:	Email Address	
SMS Variable			
Variable	Name:	Select a Variable	Clear
Variable Description Ov	verride:		
Reply Email Address:	robin.h	olderness@apteco.com	
Reply SMS Number:			
Upload but don't broa	adcast		
Append to List			
Number of Retries:			0
Response File Key Type:	Comm	unication Key	•
Message Content Type:	Broado	aster Template	•
• Errors			

## Table 5 – PeopleStage Output Settings

Table 5 Teoplestage Output se	
Field	Settings
Broadcaster	Select Elaine <sup>®</sup> 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 Address" <b>Note:</b> This must correspond to the e-mail field within Elaine <sup>®</sup>
Upload but don't broadcast	(Optional) – Select this check box to upload the list only without initiating a broadcast
Reply email Address	The email address that will receive notifications when the channel is used, i.e. list uploaded / broadcast. <b>Note:</b> 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 Elaine <sup>®</sup> .
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

Output File Format: Com	-	ost Settings
Output File Format: Com Output Header: Des Delimiter: Tab Alpha Encloser: Non	ma Separated Values (CSV) criptions	
Output Header: Des Delimiter: Tab Alpha Encloser: Non	eriptions	
Delimiter: Tab	3	•
Alpha Encloser: Non	-	
	-	
Numeric Encloser: Non	9	
		•
Extras:		
Encoding: utf-8		
Errors		
Parameter ApiBase has no	value set	
Parameter FTPUsername ha	is no value set	
Parameter FTPPassword ha	s no value set	

## Note:

The default Encoding is Windows-1252 if you change use the same setting on the **Parameter Settings** tab. Set this to utf-8

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

	Refresh Editor Save & Close
Channel Settings Output Settings File Settings Parameter Settings Additional Variables Co	st Settings
•	Add
Encoding	
Escape Quotes	
FTP Protocol	
FTP URL	1 1 1 0 1
Mailing List Retention Period	lue is "sttp".
Max Import Wait Time	
Message Preview Group Name	
Private Key Path	
Upload Empty Lists	
Use Dated List	
▼	

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

	Parameter Value
Api Base	ed92.elaine-asp.de
Elaine Email Field Name	Email Address
Elaine Urn Field Name	Urn
FTP Password	ed92
FTP Protocol	sftp
FTP URL	ed92.elaine-asp.de/%2Fsieis/import/upload
FTP Username	ed92
Private Key Path	C:\Temp\elaine-nopassword.ppk
Upload Empty Lists	false
Message Preview Group Name	MessagePreviewGroup
Append Email To Urn	true
Mailing List Retention Period	7
Max Import Wait Time	500
Escape Quotes	true
Encoding	UTF8

## Table 6 – Example PeopleStage Parameter Settings

Field	Settings
	*Example, these will be specific to your account
Api Base	nr23.elaine-asp.de
Elaine Email Field Name	Email Address*
FTP Password	Enter your FTP password*
FTP Protocol	Either sftp, ftp or ftps*
FTP URL	nr23.elaine-asp.de/*
FTP Username	ed22*
Private Key Path	C:\Temp\elaine-nopassword.ppk*
Upload Empty Lists	false
Message Preview Group Name	MessagePreviewGroup*
Append Email to Urn	true
Mailing List Retention Period	7
Max Import Wait Time	500
Escape Quotes	true
API Version	*This refers to the Elaine API Version either 1 or 2
Encoding	UTF8

See Appendix B for all the available parameters

	Variable Name	Variable Descripti T	Output Type	Formatting	Unclassified as blar
	Forename (PeForena	First Name	-	No Formatting	-
	Select a Variable 🔹		-	-	-
	<ul> <li>Household</li> </ul>				
	Person				
	<ul> <li>Company Socials</li> </ul>				
	Shows				
	<ul> <li>Communications</li> </ul>				
	<ul> <li>Journey History</li> </ul>				
	Email Responses				
	<ul> <li>Others</li> </ul>				
ļ	Add Additional Variable	s Directly			
فالمل	tional Variables Locatio	n:	End		

6. Add any additional variables on the Additional Variables tab

## 7. Click Save & Close

				Refre	sh Editor Save & Close
Chan	nel Settings Output Setti	ngs File Settings Parame	ter Settings Additional	Variables Cost Settings	
	Variable Name	Variable Descriptio	Output Type	Formatting	Unclassified as blanks
>	Forename (PeForena)	First Name	-	No Formatting	-
	Surname (PeSurnam)		-	No Formatting	-
	Add Additional Variables Directly				
Addi	itional Variables Location	:	End		Ŧ
$\odot$	Errors				

## 5.2 **Broadcasting in PeopleStage**

You can now test your channel at any Delivery Stage

1. You can drag your new Elaine<sup>®</sup> channel from the Library to your Delivery step

Library
Q
Sort By Description
Deliveries
New Delivery
Channels
👻 🎦 Channels:\Email
Email - Elaine
00

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

	Delivery
	Everyone
	Email - Elaine
	Email - Elaine
	Message Name: Summer Promotion
	Summer Promotion
	List Name:
	FERGE Initial Test
-	Upload and automatically broadcast
	Requires Manual Approval

3. You can use the same List Name as the Message Name or define a custom one

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

# Appendix A: Elaine<sup>®</sup> Configuration

Elaine<sup>®</sup> works on the principle of having a database of subscribers, which you can segment into lists. FastStats or PeopleStage will upload a list of subscribers and insert them into the Elaine<sup>®</sup> database.

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 Elaine<sup>®</sup>.

ELAINE SIX	ONLINE DIALOG CF	RM	
	Benutzername		
	Passwort	•••••	
			LOG-IN

1. Login to your Elaine<sup>®</sup> account to access the web-based control panel

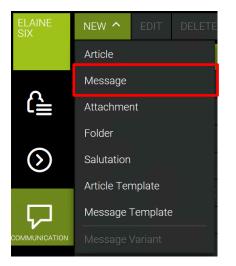
### Note:

You can change the interface language from the settings menu, top right.



## **Creating a new Message in Elaine®**

2. From: Communications go to New > Message



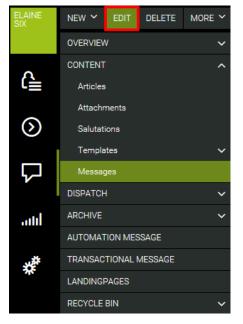
The Create Message dialogue opens

- 3. Enter a Name for the message and select from the options:
  - Create the New Message using a template
  - Import Message To import a message

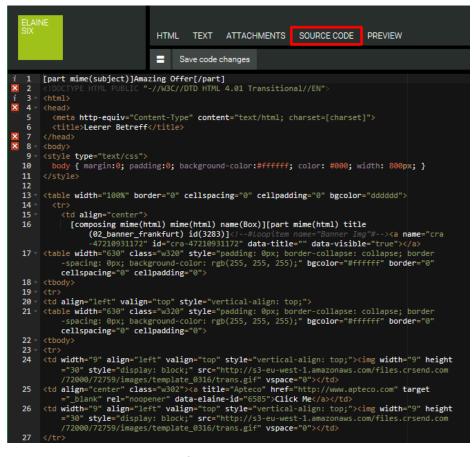
ELAINE SIX	CREATE MESSAG	Έ						
	Name 🕨	New	Message					
	Folder	Mess	ages					~
	O Create a New Messa	age						
	Template	Apteo	o HTML Vorlage				~	
		Aptec	o HTML Vorlage					
	O Import Message	Empty	/ Message					
	Message 🚽							
								Ē
			OK AND OPEN		CREATE		CANC	EL

Add any relevant offers that you want in the message, these can be picked up by PeopleStage when clicked by the recipient.

4. You can edit the Subject and the email content by selecting the message from the list in **Communications** and clicking **Edit** 



5. To further Add/Edit HTML or text content use the Source tab



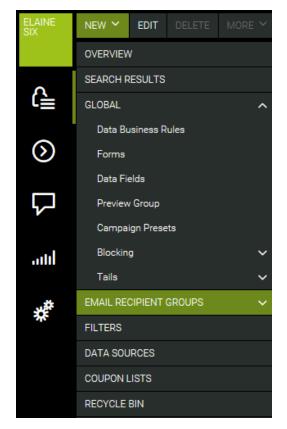
Once complete, click Save code changes

#### Note:

You should test your message to ensure there are no problems with the email message.

You can either create a List to use with FastStats or PeopleStage, these are called Recipient Groups in Elaine<sup>®</sup>, or you can enter a name in the Email Broadcasting Wizard which will create a list.





## The Create Recipient Group window opens

The Name of the recipient group corresponds to the List Name

ELAINE SIX	CREAT	E RECIPIENT GR	OUP						×
SIA	General	Sender Parameters	Interaction	User Access Rights					
	Channel		E-Mail					~	
	Name	>	Summer List						
	Folder		Email recipient	groups					1
	Website								
	Descriptio	ın							
	Expiration	interval in days		\$					
						ОК	С	ANCEL	

# Appendix B: API Parameters

## Table 9 – Email Response Gatherer Parameters

Parameter	Required	Default	Description
ApiBase	Y	nr23.elaine-asp.de*	The web service on the server tha hosts your Elaine®
			account
ApiProtocol	Y	https*	The communication protocol used with Elaine <sup>®</sup> , either
			http or https
FTPURL	Y		The ftp location (including username and password)
			where your Elaine <sup>®</sup> responses are generated
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	Y	Response*	Allows you to filter your responses to specific types
			when reading files from the ftp site

The following data is inserted into the FastStats Email Response Table

	Required	Response Table field	Elaine <sup>®</sup> extract file column
EMAILCOLUMNNAME	Ν	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	Ν		Reserved for future use
TYPECOLUMNNAME	Ν	MessageType	Response type
MESSAGENAMECOLUMNNAME	N		The message name is not returned in the Elaine <sup>®</sup> extract file, but a reference is, this should typically be left as the default value
DELIVERYDATECOLUMNNAME	Ν	DeliveryDate	Delivery date
CLICKURLCOLUMNNAME	N	ClickUrl	The name of the URL that was clicked
CLICKDATECOLUMNNAME	N	ClickDate	Date the link was clicked
EVENTTRIGGEREDDATECOLUMNNAME	Ν	EventTriggeredDate	Date the response occurred

## Note:

\*These settings are specific to each Elaine<sup>®</sup> 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	Ν	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
Note: Encloser setting for Elaine 6	Y	1	e" for Elaine 6
TreatTypeAsAdditionalField	Ν	false	Setting this to true will force the raw response
			type to be written to the <b>ReponseDetails</b> table
			before any conversion is carried out
TreatMessageNameAsAdditionalField	Ν	false	Setting this to true will force the raw message
			name to be written to the <b>ResponseDetails</b>
			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 lds will be fetched and cached as and
Only Drocoss Docords Mith Drood os stild	N	false	when required Setting this to true will force the Email Response
OnlyProcessRecordsWithBroadcastId	IN	laise	Gatherer to only download responses to
			messages that have originated from FastStats.
			The default option is false; all responses will be
			downloaded.
			uuwiiiuaueu.

Parameter	Required Y/N	Default	Description
ApiBase	Y	nr23.elaine-asp.de.	The web service on the server your
	-		Elaine <sup>®</sup> account is hosted on
ApiProtocol	N	https	The communication protocol used,
		inceps	either http or https
АріКеу	Y	1	This refers to the Elaine API Version
Арікеу	T		either 1 or 2
	N N		
FTPUsername	Y		The username for the login to the ftp site
			specified in FTPURL.
FTPPassword	Y		The password for the login to the ftp site
			specified in FTPURL
FTPURL	N	nr23.elaine-asp.de.	The ftp location where your upload will
			be generated
FTPProtocol	N	ftp	The type of ftp protocol you will be
			using to upload your list, options
			include:
			• ftp
			<ul><li>ftps</li><li>sftp</li></ul>
PRIVATEKEYPATH	N		If secure ftp is used above and requires a
	IN IN		private key, this should refer to the path
			and filename of that key
UploadEmptyLists	N	true	Set this to false if you wish to prevent
			empty list being uploaded to Elaine®
UseDatedList	N	true	Setting this to false will remove the date
			and time stamp at the end of the file
DatedListFormat	N	yyyMMdd-HHmmss	name The date format string for the date and
DatedListi offiat	IN IN	yyyiviividd-fiffiffiffiss	time stamp if created
ElaineUrnFieldName	N		The name of the field in Elaine <sup>®</sup> that will
			hold the URN
ElaineSmsFieldName	N		The name of the field in Elaine <sup>®</sup> that will
			hold the mobile number
ElaineCommunicationFieldName	N		The name of the field in Elaine <sup>®</sup> that will
			hold the communication key
MaxImportWaitTime	Ν	300 (5 minutes)	The maximum time to wait for a list to
Encoding	N	UTF8	be imported in seconds Enter the encoding of the incoming file
EscapeQuotes	N	False	Set this to true to escape quote
EscapeQuotes		T disc	characters
MailingListRetentionPeriod	N	0	The number of days to keep the
			uploaded mailing list
AppendEmailToURN	Ν	False	Setting this to true will generate the urn
			field as urn email
MessagePreviewGroupName	Ν		Defines the name of a group on Elaine®
			to use for previewing content when the
			target group cannot be found

## Table 10 – Email Broadcasting Parameters

# Appendix C:Example Batch File

Example batch file to use with FERG and scheduling
@echo off
REM************************************
REM File Name: Elaine BatchFile.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 ************************************
c:
cd c:\FastStats\FERG
cls
SET FERG="%ProgramFiles%\Apteco\FastStats Email Response Gatherer x64\EmailResponseGatherer64.exe"
SET LOGFILE="Logs\Elaine.txt"
SET LOGFILEDETAILS="Logs\Elaine_Details.txt"
echo. >> %LOGFILE%
echo. >> %LOGFILEDETAILS%
echo %date% %time% - Starting FastStats Elaine Response Download >> %LOGFILE%
echo %date% %time% - Starting FastStats Elaine Response Download >> %LOGFILEDETAILS%
echo. >> %LOGFILE%
>> %LOGFILEDETAILS%
echo.
%FERG% Elaine.xml >> %LOGFILEDETAILS%
IF ERRORLEVEL 9003 goto FailedException
IF ERRORLEVEL 9002 goto FailedLogout
IF ERRORLEVEL 9001 goto FailedDownload

IF ERRORLEVEL 9000 goto FailedLogin

## echo %date% %time% - FastStats Gathered Elaine Responses OK >> %LOGFILE%

## goto Complete

### :FailedLogin

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

goto Complete

#### :FailedDownload

echo %date% %time% - FastStats Gatherer Failed - Downloading from Elaine >> %LOGFILE% goto Complete

### :FailedLogout

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

goto Complete

#### :FailedException

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

goto Complete

### :Complete

echo %date% %time% - Completed FastStats Elaine 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:API Methods and Calls

The following describes the methods and calls used during an exchange from FastStats to the Elaine<sup>®</sup> API

First, we get the Groups, and get the data fields for the Groups

/api\_getGroups /api\_getDataFields?p1=group

Get the current Import Status of the group, loop until we receive the status for the group that we are importing.

Loop

/api\_getImportStatus?p1=filename

Until success

Then to broadcast a message to the imported group

/api\_getMailingsByStatus?p1=status

/api\_getDetails?p1=Mailing&p2=mailingId

/api\_getGroups

/api\_mailingCopy?p1=mailingId&p2=name&p3=&p4=folder

/api\_mailingAddressToGroup?p1=mailingId&p2=groupId&p3=type&p4=campaignId

/api\_mailingRelease?p1=mailingId&p2=dateandtime&p3=cycle

## **Appendix E: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\Elaine.xml'.

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

%FERG% Elaine.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.

## Errors relating to running a campaign

These errors can occur due to

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.

### Apteco GmbH

Schaumainkai 87 60596 Frankfurt am Main Germany T: +49 (0) 69 25 66 97 0 - 0 support@apteco.de www.apteco.de

## Apteco Australia Pty Ltd

Level 2 99 Macquarie Street Sydney NSW 2000 Australia T: +61 (0) 2 8355 2524 www.apteco.com.au

### **Apteco Benelux**

Stationsplein 45, Unit 4.004 3013 AK, Rotterdam The Netherlands T: +31 (0) 10 80 80 875 Email: support@apteco.nl www.apteco.nl

## Head Office Apteco UK

Tink-a-Tank House 21 Jury Street Warwick CV34 4EH, UK

T: +44 (0) 1926 407565 E: support@apteco.com W: www.apteco.com © 2020 Apteco Ltd. All rights reserved.

This publication is for informational purposes only. While every effort has been made to ensure accuracy, this publication shall not be read to include any warranty or guarantee, express or implied, including about the products or services described or their use or applicability.

Apteco Ltd. reserves the right to modify or improve the designs or specifications of its solutions at any time without notice.

