



Apteco

# Technical Guide

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

Adestra Integration Guide  
D053T3X002– December 2018

## **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 updated December 2018

# Contents

- 1 Introduction ..... 2**
  - 1.1 Summary of Adestra functionality..... 2
  - 1.2 Before You Begin ..... 3
- 2 Process Summary ..... 4**
  - 2.1 Architecture ..... 4
- 3 Apteco System Configuration ..... 6**
  - 3.1 Creating the Response Database..... 6
  - 3.2 Linking the Response Database to the FastStats Service ..... 10
  - 3.3 Installing the Email Response Gatherer ..... 12
  - 3.4 Creating the Response Gatherer Folders ..... 15
  - 3.5 Creating the Configuration File ..... 16
  - 3.6 Scheduling the Response Gatherer ..... 18
- 4 FastStats Broadcasting & Responses..... 21**
  - 4.1 Enable Email Broadcasting.....21
  - 4.2 Configuration in FastStats .....23
  - 4.3 Adding a Predefined Broadcasting Field Set .....26
  - 4.4 Checking your configuration.....29
  - 4.5 Email Responses Wizard .....32
- 5 PeopleStage Broadcasting & Responses..... 36**
  - 5.1 Defining the Broadcast Channel in PeopleStage.....36
  - 5.2 Broadcasting in PeopleStage.....41
- Appendix A: Adestra Configuration..... 42**
- Appendix B: API Parameters ..... 50**
- Appendix C: Example Batch File ..... 53**
- Appendix D: Troubleshooting ..... 55**

# 1 Introduction

This integration guide details the processes required to integrate the Apteco Marketing Suite with the Aestra 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 Aestra. Use of the Apteco Marketing Suite in combination with Aestra 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 Aestra functionality

### Technology

Aestra integrates with your FastStats system by utilising a custom XML RPC over HTTP/S, in conjunction with SFTP.

### Supported Integrations

Aestra supports all the above integration options.

### Type of Integration - Predefined

Aestra is a Predefined integration meaning the output is defined by an administrator and will be structured to match the required field layout of the Digital Integrator's subscriber database. Typically, a list will contain standard and transactional data.

## 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 Aestra. You will also need to understand how to construct your message in Aestra.

---

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 Aestra
  - b. API Parameters

You need to configure Aestra 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 Aestra **Account Name, Username** and **Password** for the Aestra UI
- The Aestra API Username and Password  
(The API Username is a combination of the above **AccountName.Username**)
- The API URL `https://new.aestra.com/api/xmlrpc`
- The **\*Username/s** to associate with a broadcast in FastStats or PeopleStage
- The Aestra **Message Name**
- Your **FTP URL** for uploading to Aestra
- The Aestra Workspace, Core Table name and Data Table name  
(Either your own FTP location, or the Aestra provided Client FTP URL)

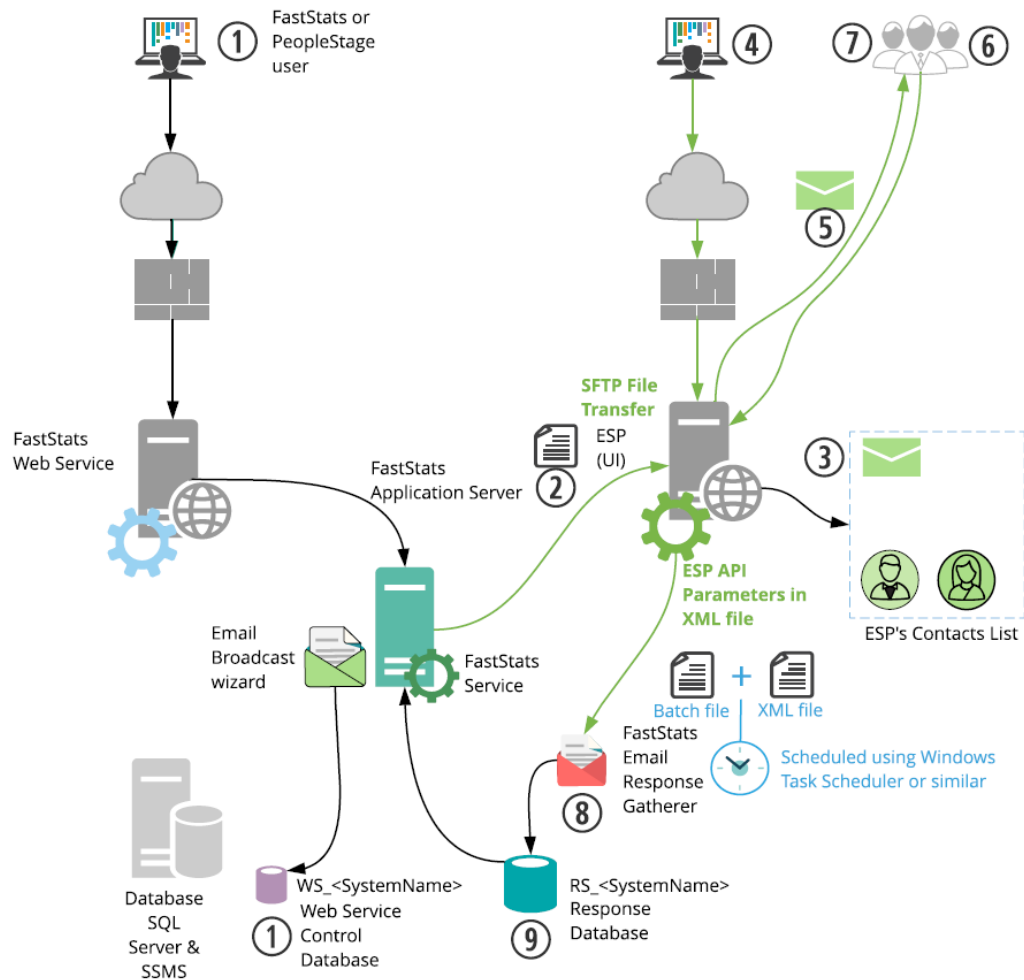
\*You can create individual users within Aestra to associate with a broadcast

## 2 Process Summary

### 2.1 Architecture

The following diagrams describe a typical process from FastStats to Aestra, to the customer and back to FastStats.

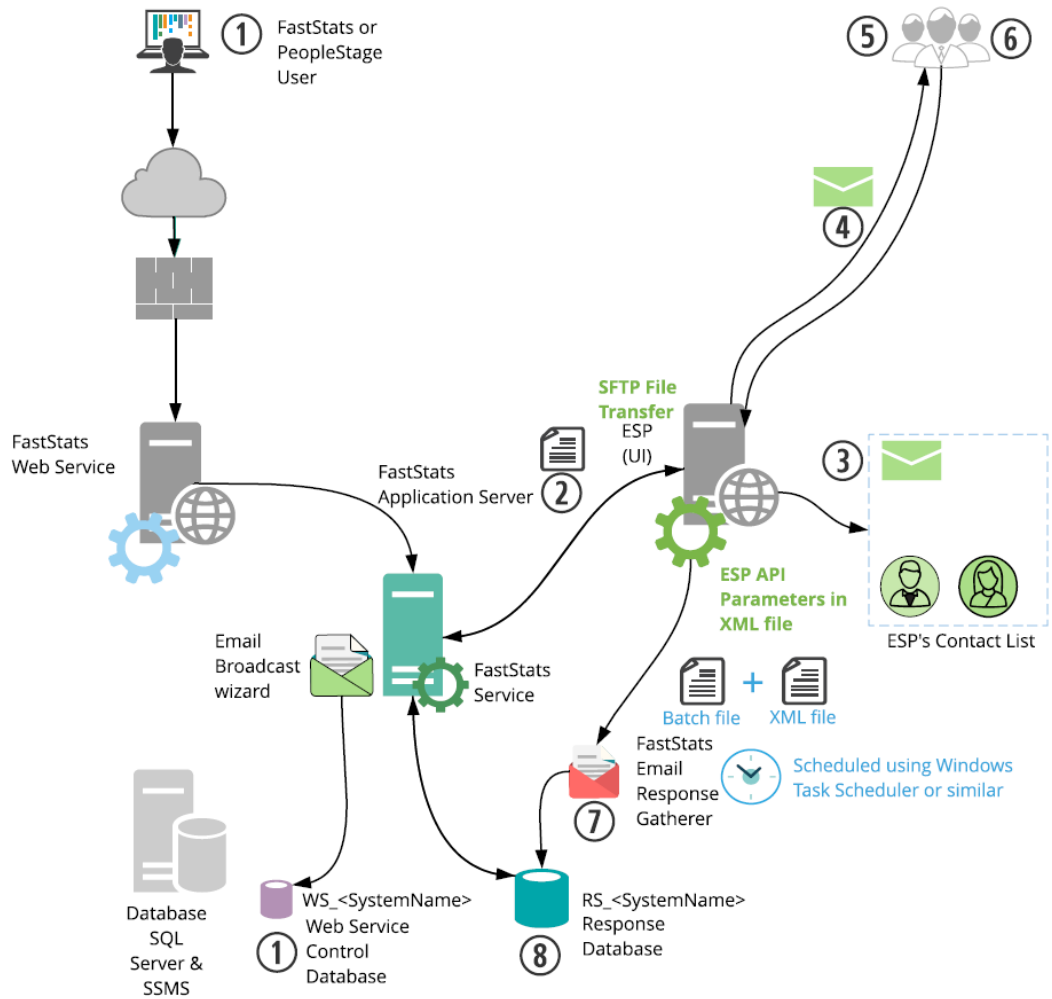
**Schematic showing campaign scheduling performed in Aestra.**



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 Aestra SFTP site and then uses RESTful communication to monitor the upload.
3. Aestra 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 Aestra web interface.
5. Aestra sends Messages to all recipients on the list.
6. Aestra records any undelivered messages.

7. Aedra 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 Aedra 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 Aedra.

# 3 Apteco System Configuration

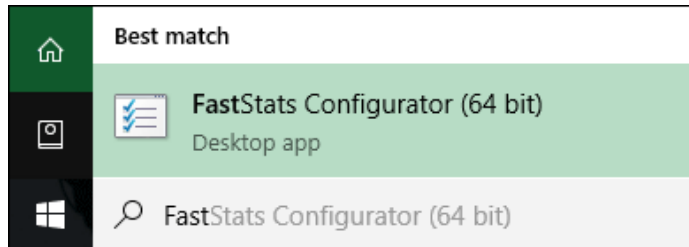
## 3.1 Creating the Response Database

You will need to create a response database to receive your responses from the ESP.

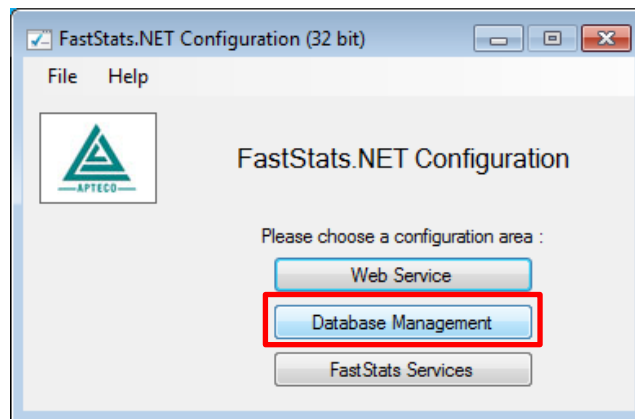
1. Open the FastStats Configurator.

**Tip:**

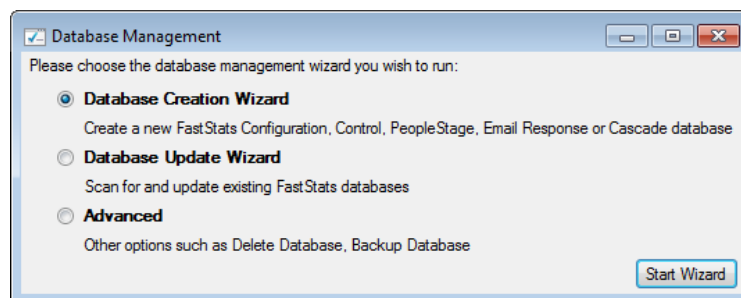
Search for Fast in the Start Menu



2. Select **Database Management**.

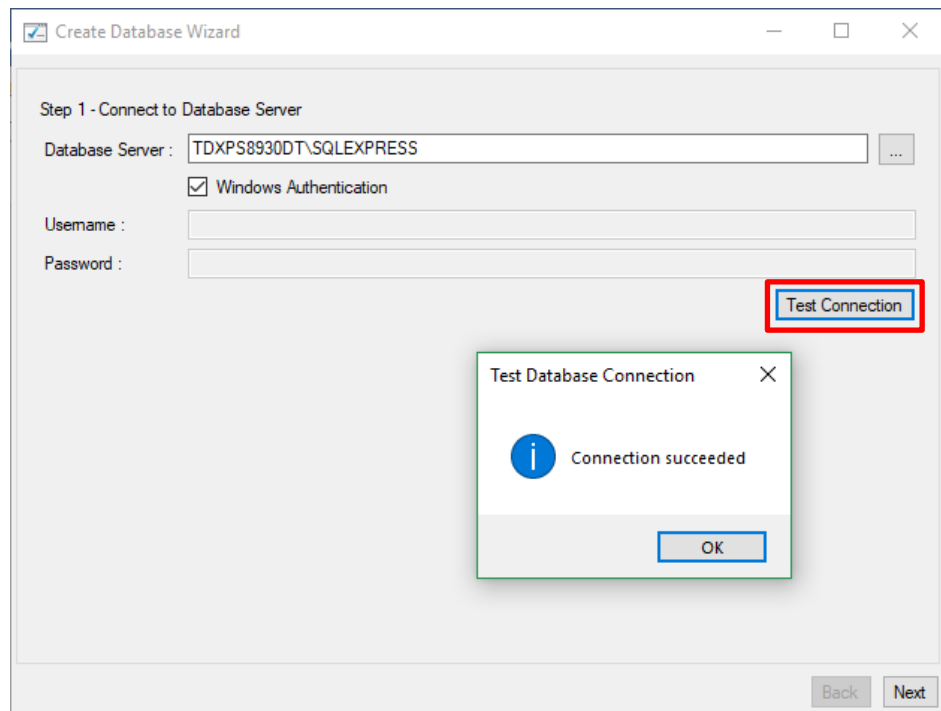


3. Select the **Database Creation Wizard** option and click **Start Wizard**.





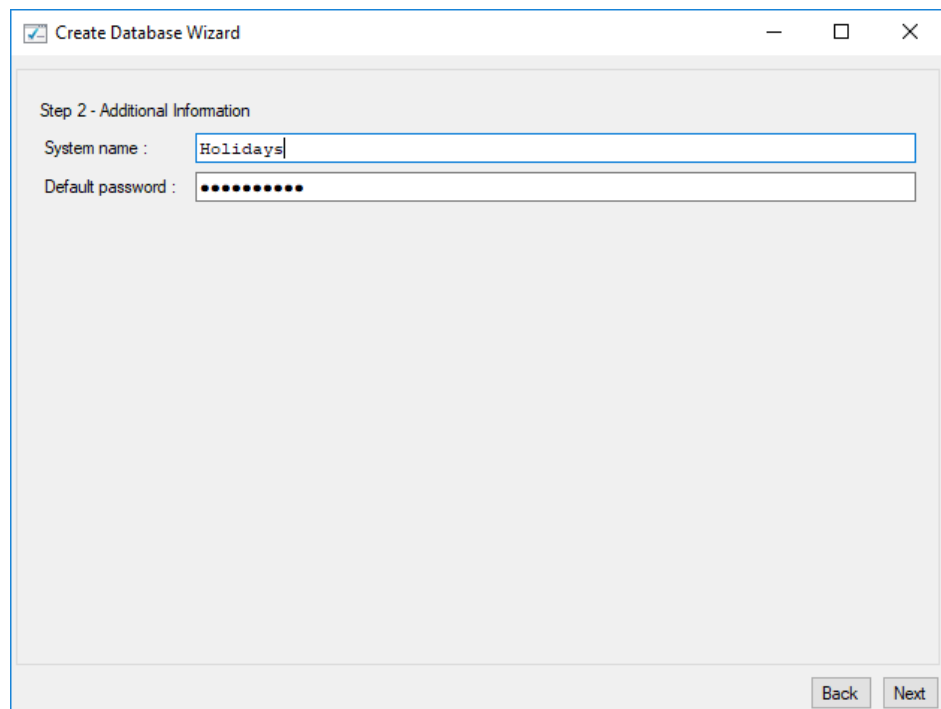
4. Enter the name of the **Database Server** where you wish to store the response database, click **Test Connection**



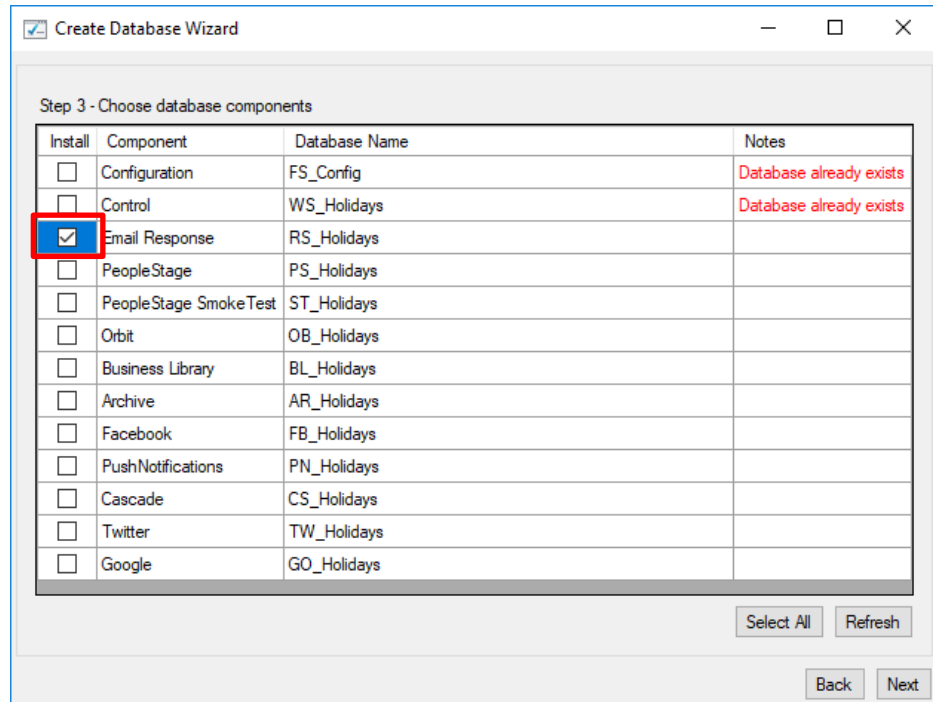
**Note:**

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.



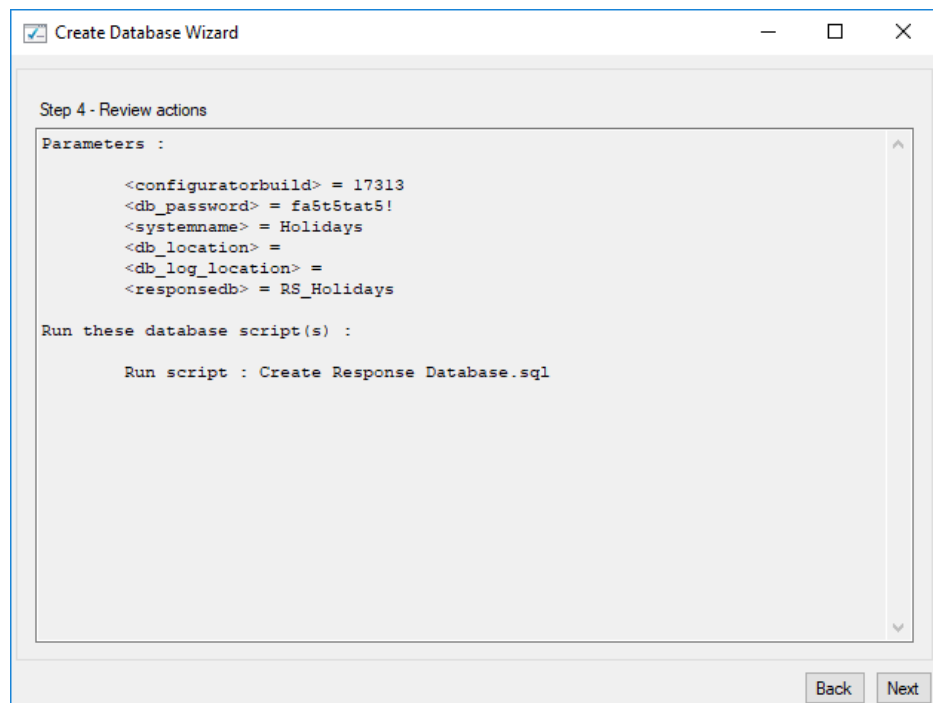
6. Select the **Email Response** check box, then click **Next**.



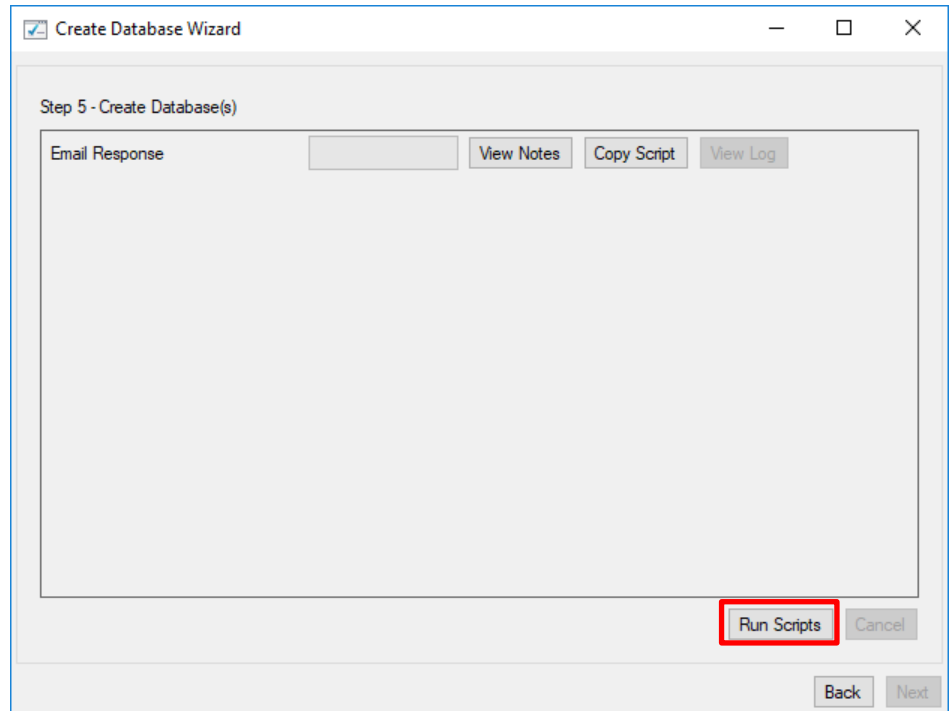
**Note:**

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.

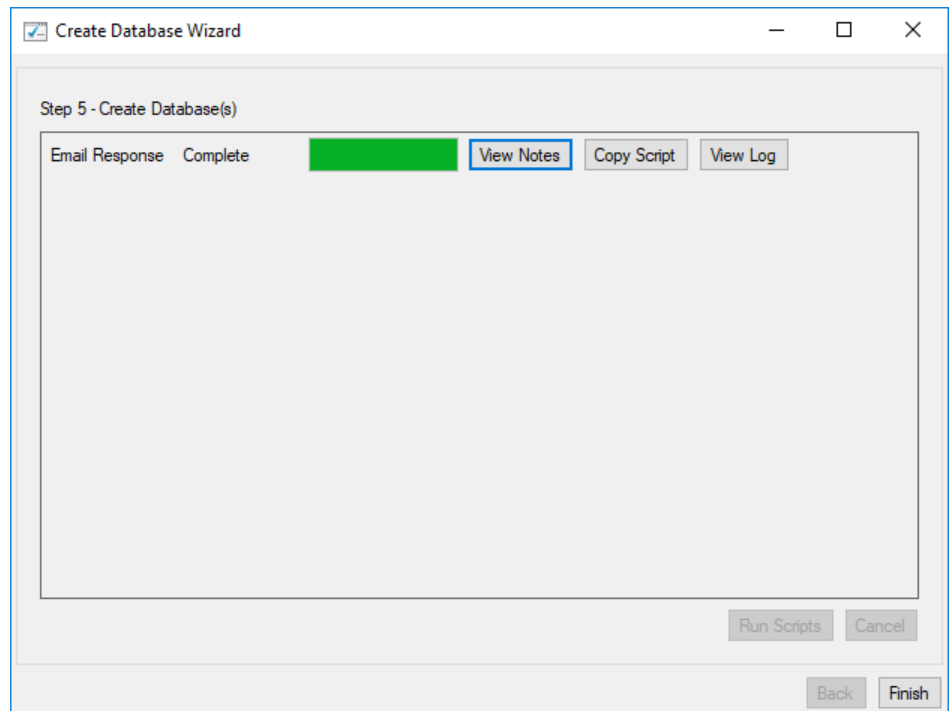
7. Click **Next** on the Review actions step.



8. Click **Run Scripts**.



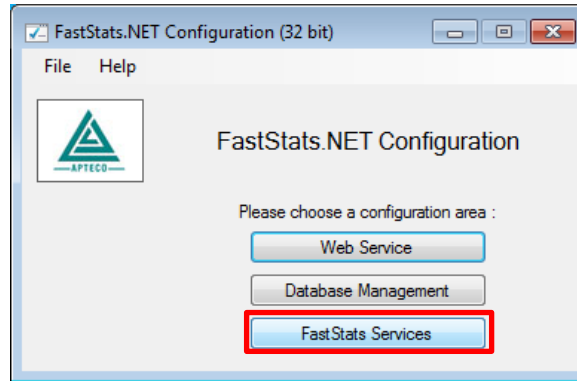
9. Click **Finish**.



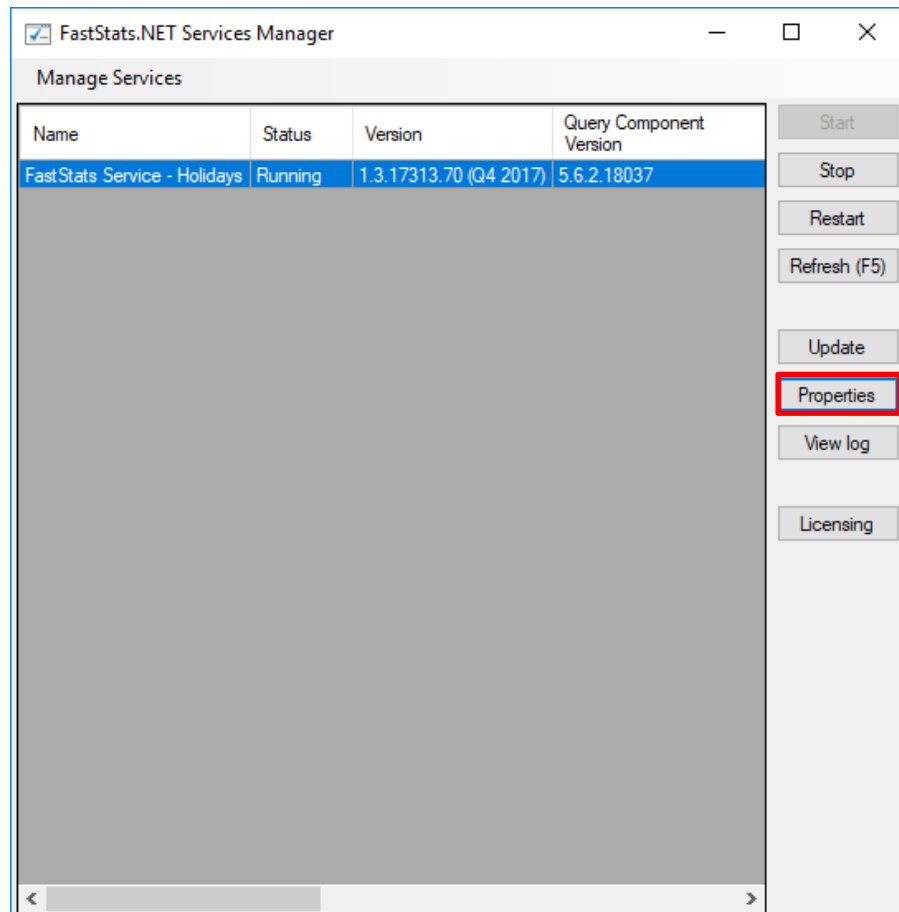
## 3.2 Linking the Response Database to the FastStats Service

You need link the response database to the FastStats service.

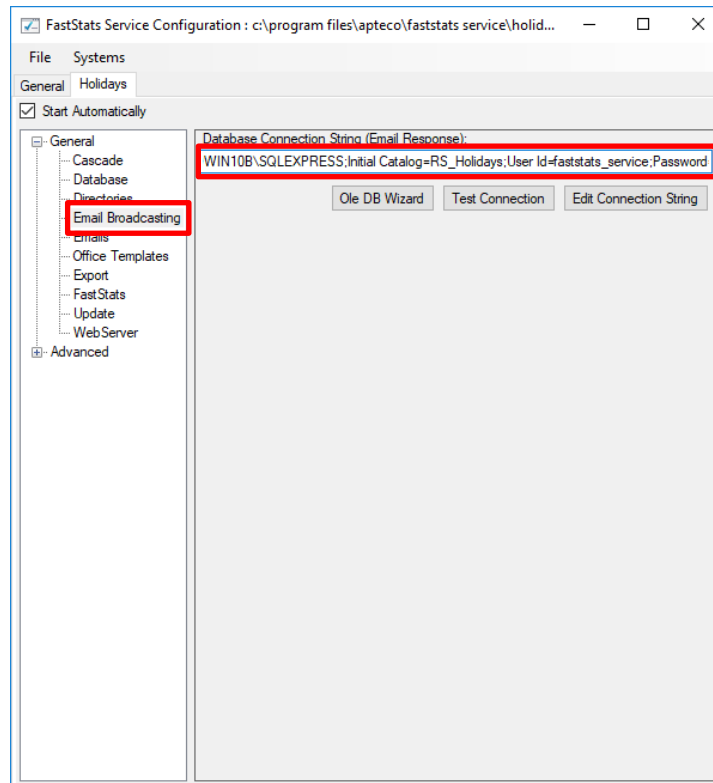
1. Open the **FastStats Configurator**
2. Select **FastStats Services**



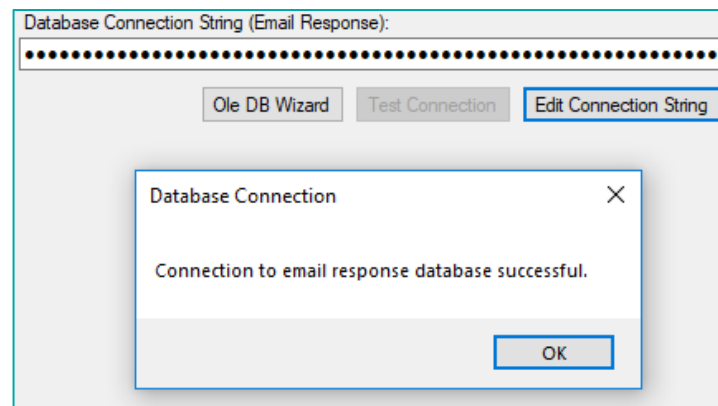
3. Select the **FastStats Service** for the system to link to the response database, click **Properties**



4. 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



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 FTP site through port 443, Adestra requires you to setup an FTP site.

---

## 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>

---

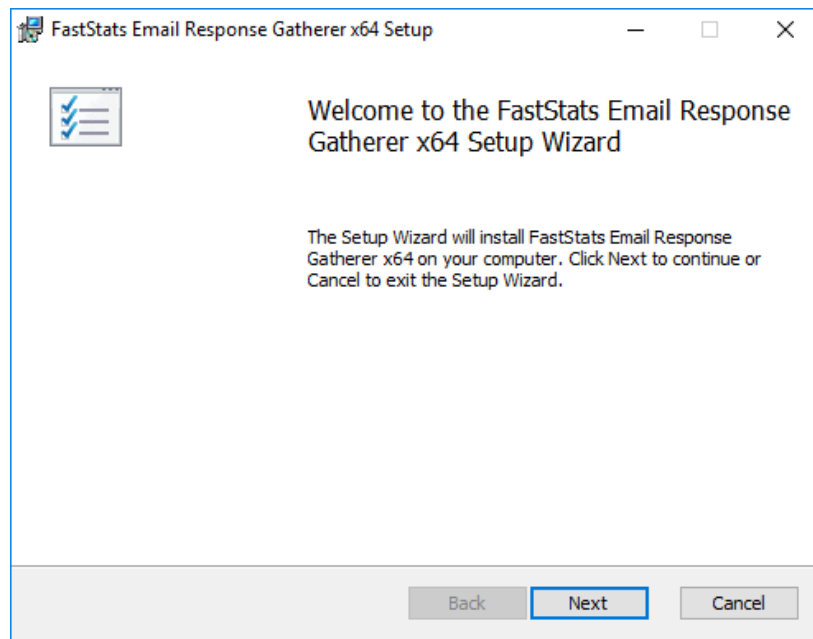
**Note:**

The FastStats Email Response Gatherer application can run on any PC in your system.

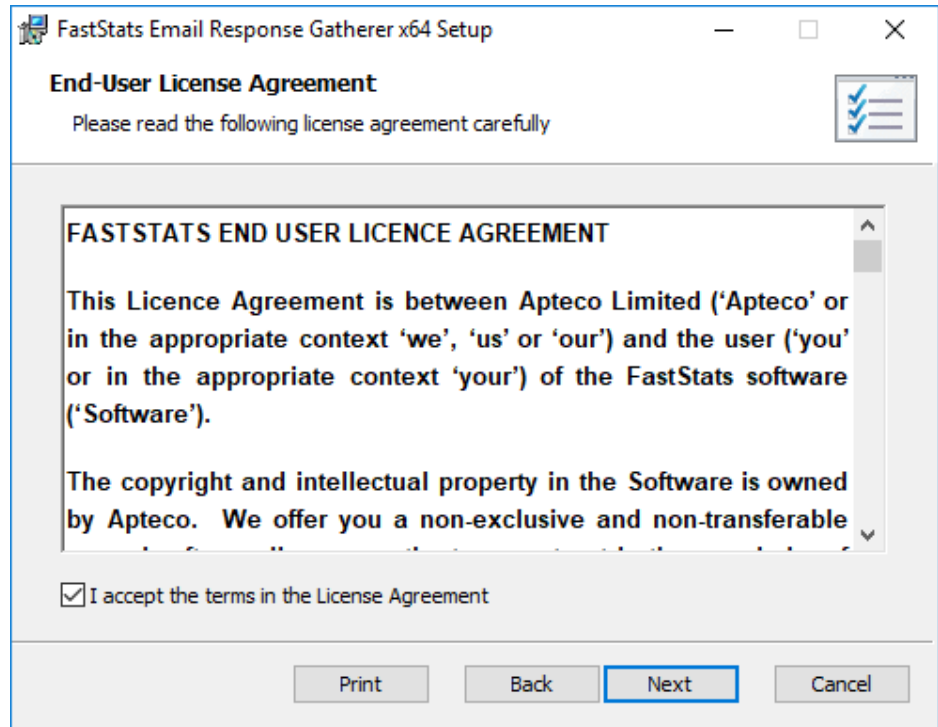
---

Open the **EmailResponseGatherer64Setup.msi** from the DigitalIntegration\EmailResponseGatherer folder.

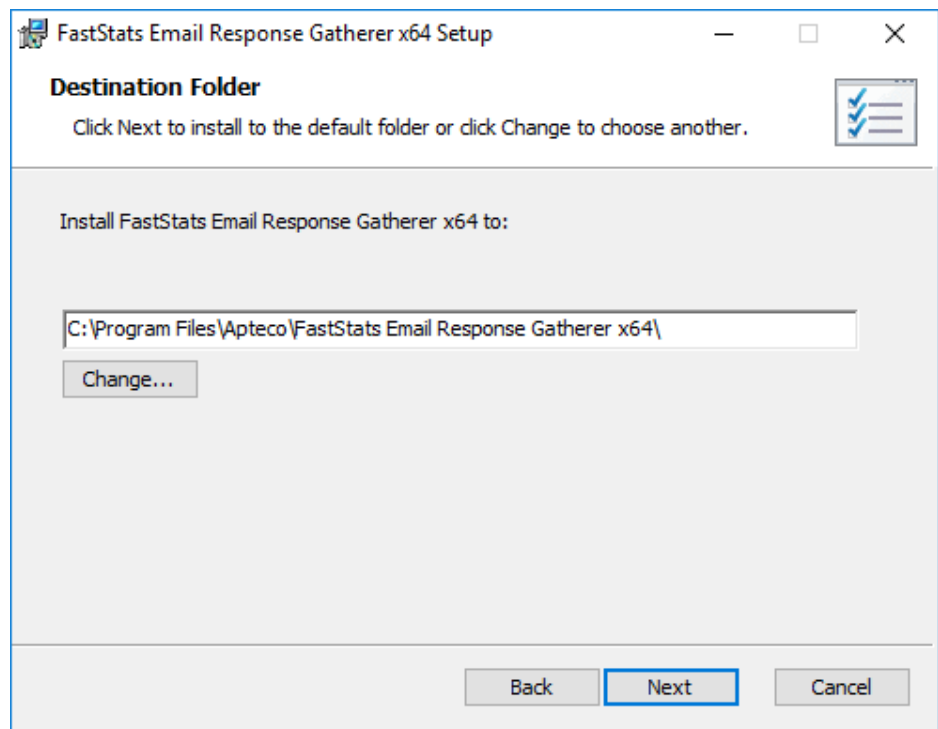
1. Click **Next**.



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

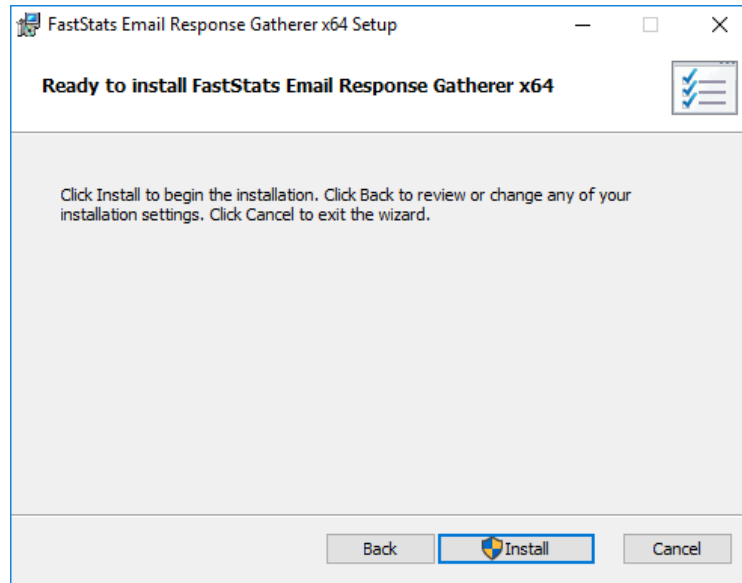


3. Click **Change** if you wish to install the Email Response Gatherer application in a different location then click **Next**

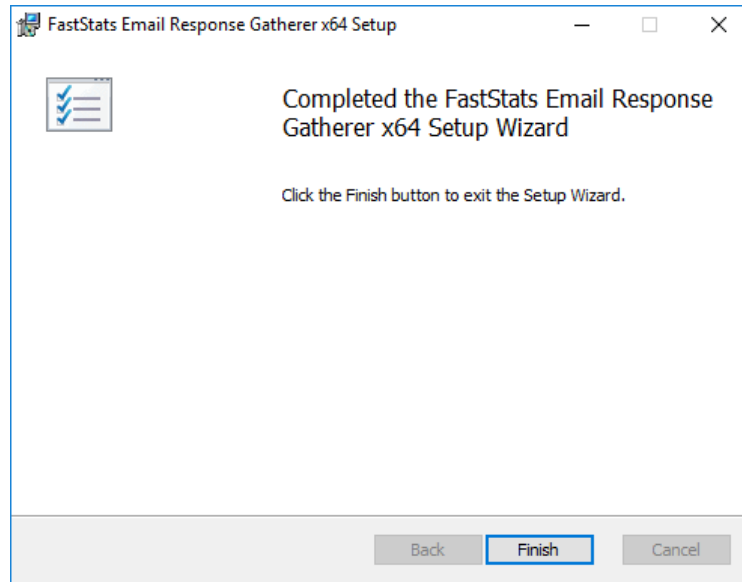
**Note:**

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**





## 3.4 Creating the Response Gatherer Folders

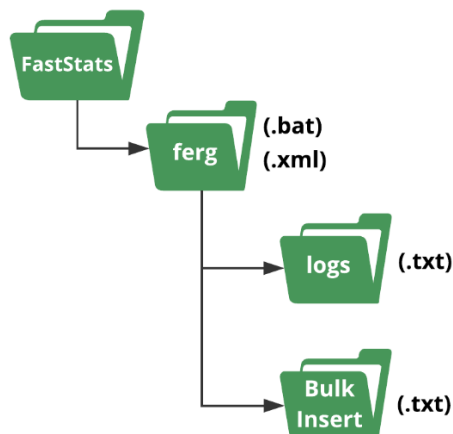
You will need to create folders to store the files to use with the Response Gatherer; these will include the following types of files.

Table 1 – Files Associated with the Response Gatherer

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 Adestra from the Broadcaster drop-down list
3. Enter the **Username** and **Password** to use with your FTP site
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

### Email Response Config dialogue with MISSING FIELDS

FastStats Email Response Gatherer

File Help

Database

Connection string : Data Source=MYSQLSERVER\SQLExpress;Initial Catalog=RS Edit

Timeout (secs) : 0 Test

Bulk insert folder : Browse

Send Email on Error SMTP Properties

PeopleStage connection string : Edit

Email Broadcaster

Broadcaster : Adestra

Username : username

Password : password

Broadcast Parameters Add

Parameter	Value
*	

Missing required parameter(s) : FTPURL

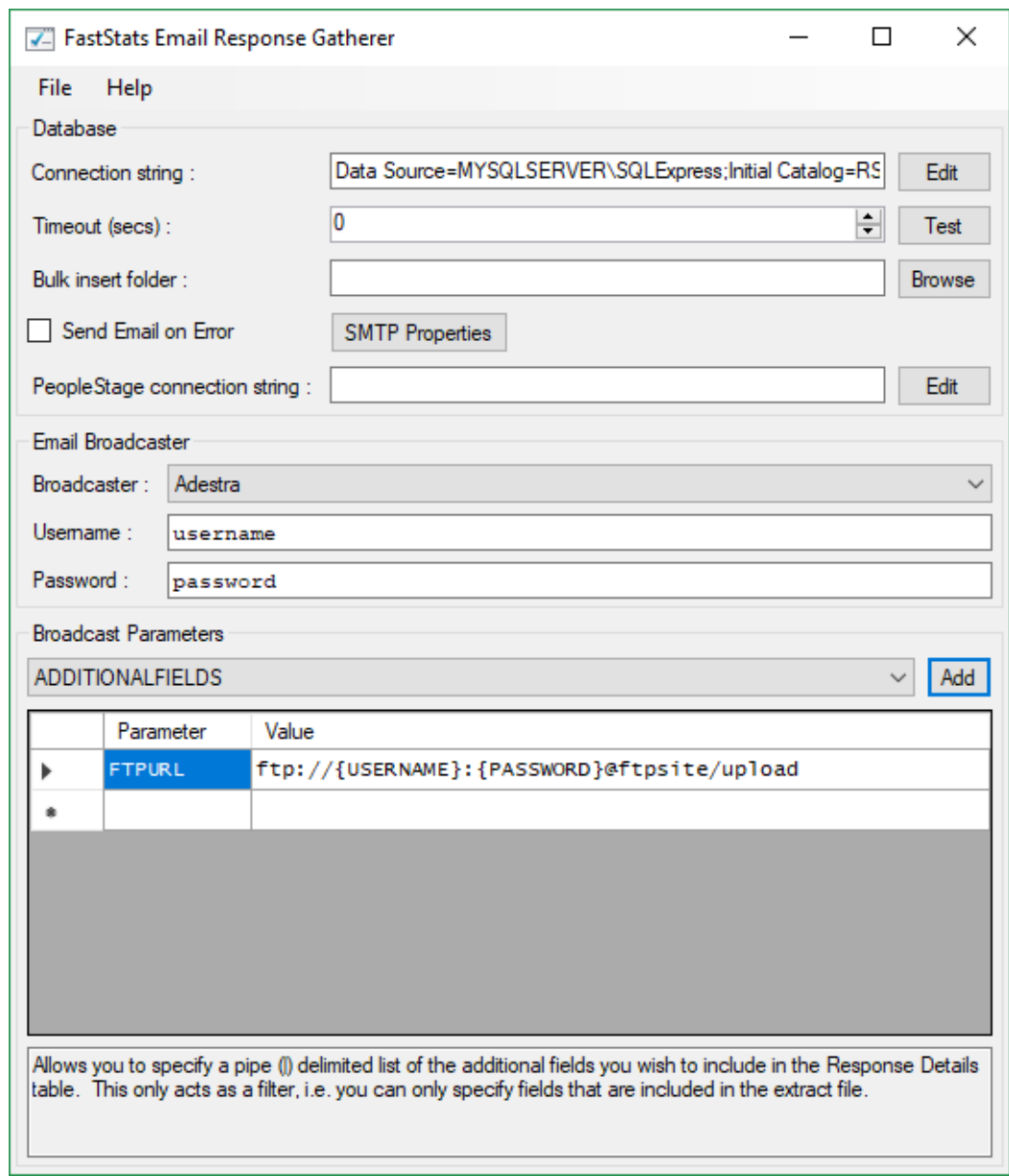
**Note:**

Adestra is a Predefined Broadcaster, the only required parameter is the FTPURL, you can use the other fields if you need to customize the collection.

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 Adestra

**Email Response Config dialogue with REQUIRED FIELDS completed**



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

## 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

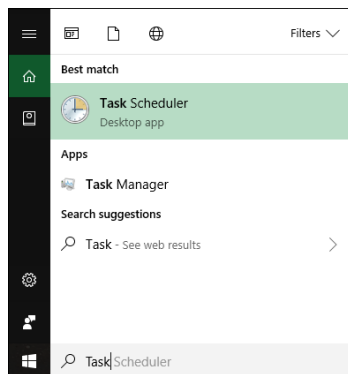
Using the Windows Task Scheduler, you can create multiple Tasks to run the Response Gatherer on a timed basis.

1. Open Windows **Task Scheduler**

---

#### Tip

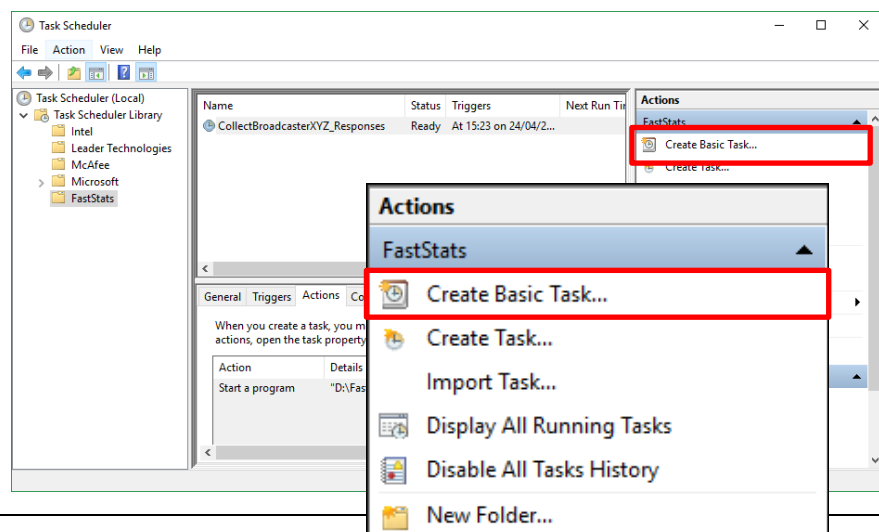
Search for **Task** in the Start Menu



---

The Windows Task Scheduler opens

2. Select **Create Basic Task**



---

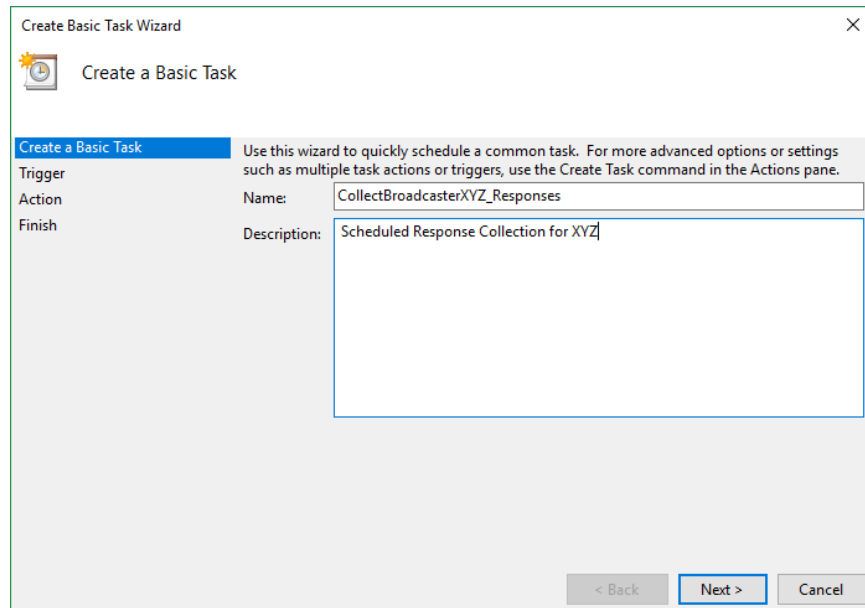
#### Tip:

You can create folders to organise your tasks

---

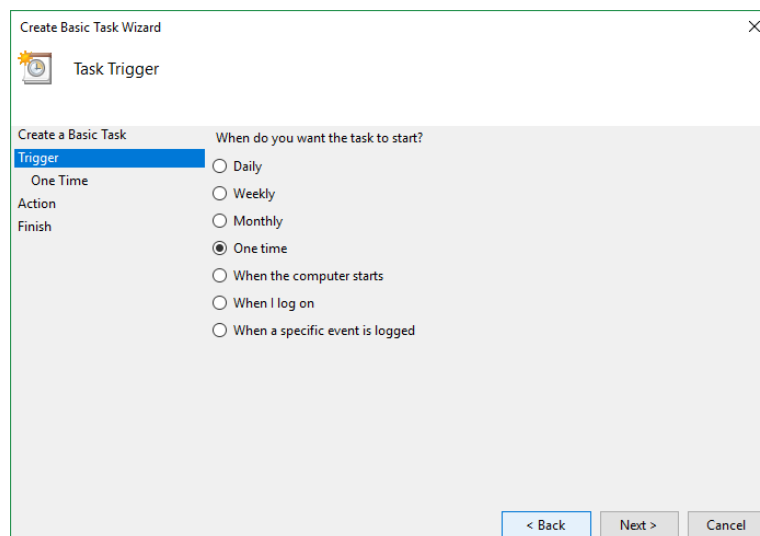
### 3. Create a Basic Task step

#### a. Give your task a Name and Description

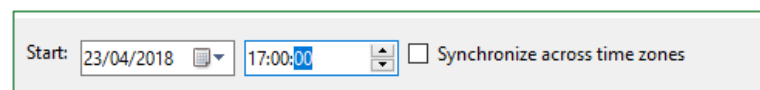


### 4. Task Trigger step

#### a. Select the Trigger interval

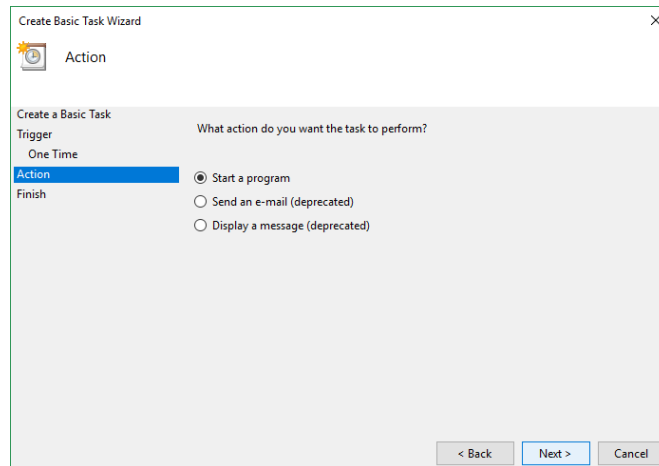


#### b. Enter the Start Date and Time or relevant sub-step details



5. **Action** step

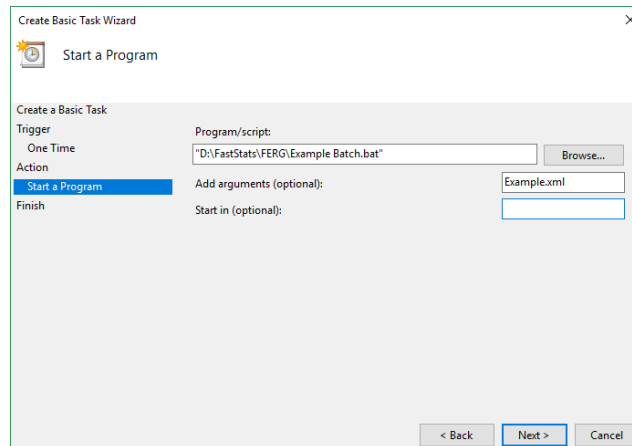
- a. Select **Start a program** and click **Next**



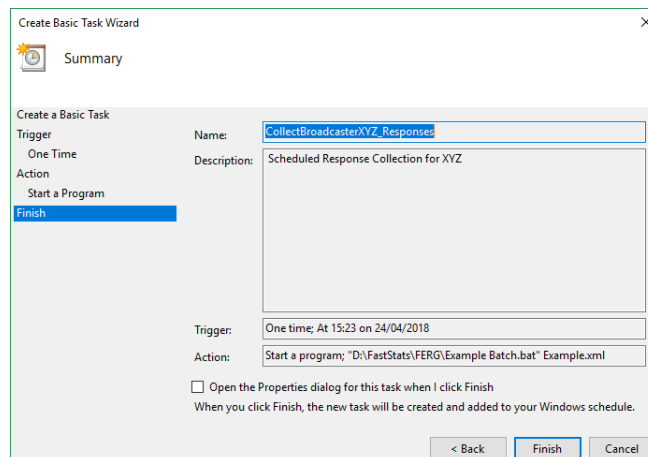
6. **Start a Program** Step

- 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.



7. **Summary** step – Click **Finish**



# 4 FastStats Broadcasting & Responses

**Notes:**

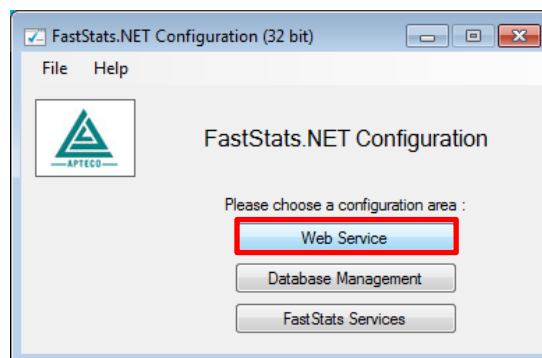
You must log in as an administrator to perform the following task.

The Email Broadcasting Wizard is required for FastStats use only.

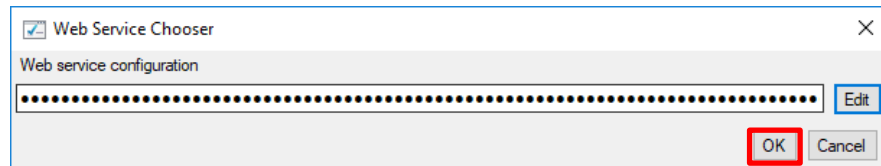
## 4.1 Enable Email Broadcasting

You must enable the Email Broadcasting wizard plugin.

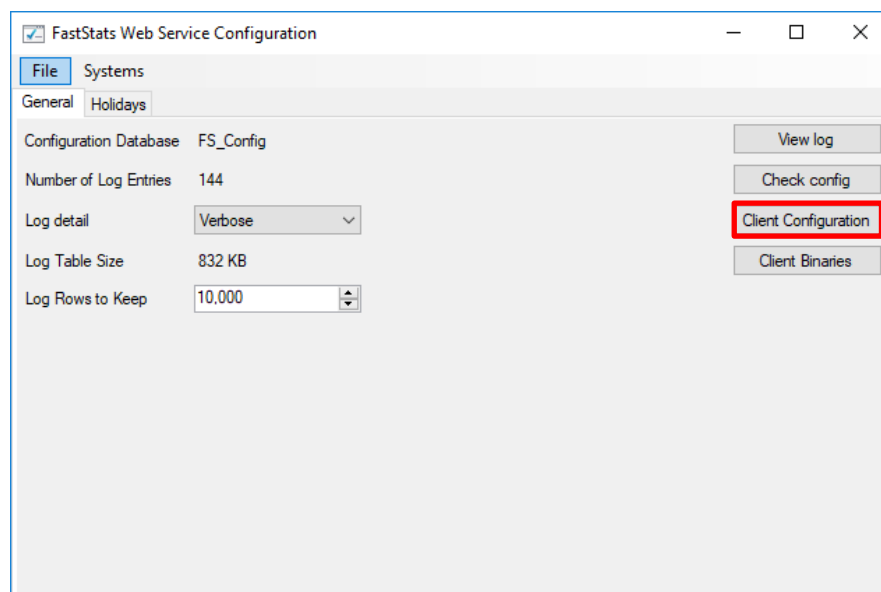
1. Open the **FastStats Configurator**
2. Select **Web Service**



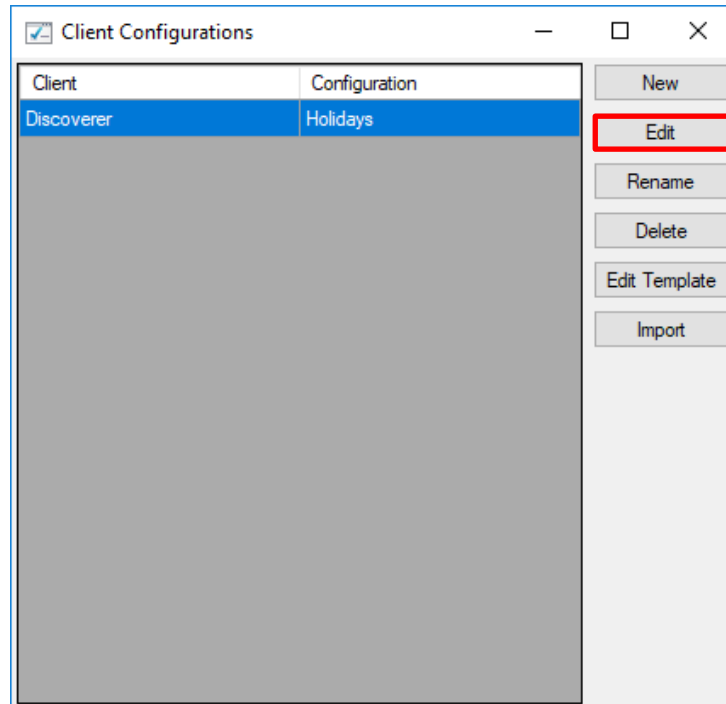
3. Click **OK** on the Web Service Chooser dialogue box



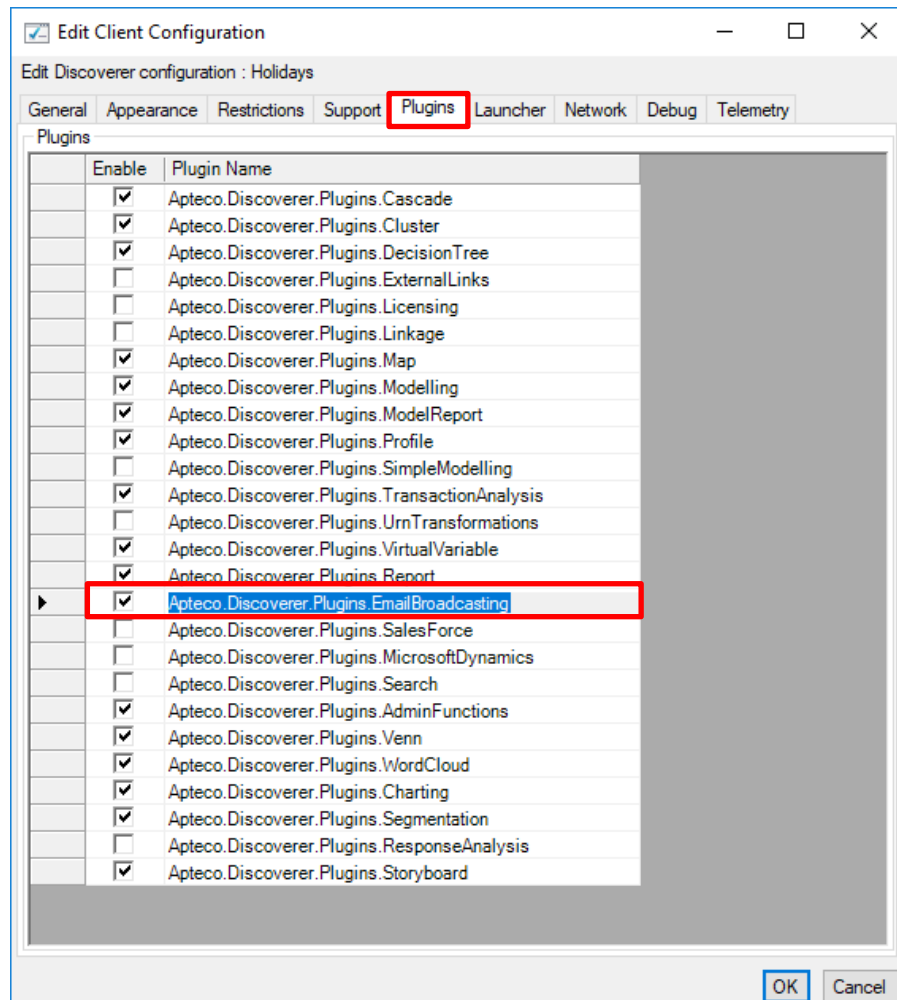
4. Click **Client Configuration**



5. Select the Discoverer client associated with your system and click **Edit**



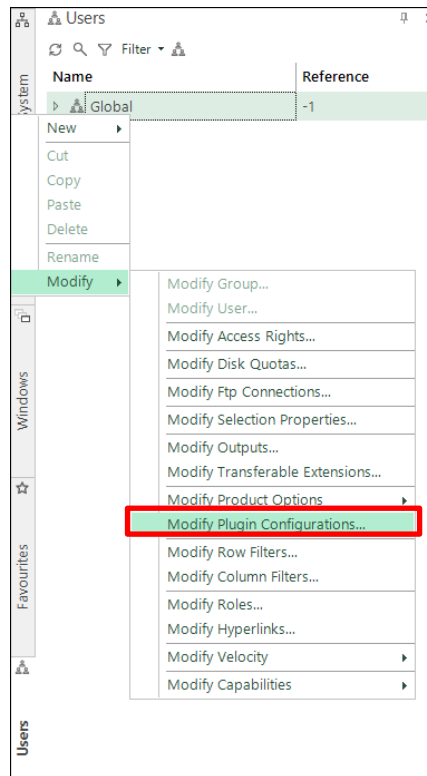
6. On the Plugins tab ensure the **Apteco.Discoverer.Plugins.EmailBroadcasting** check box is selected then click **OK**



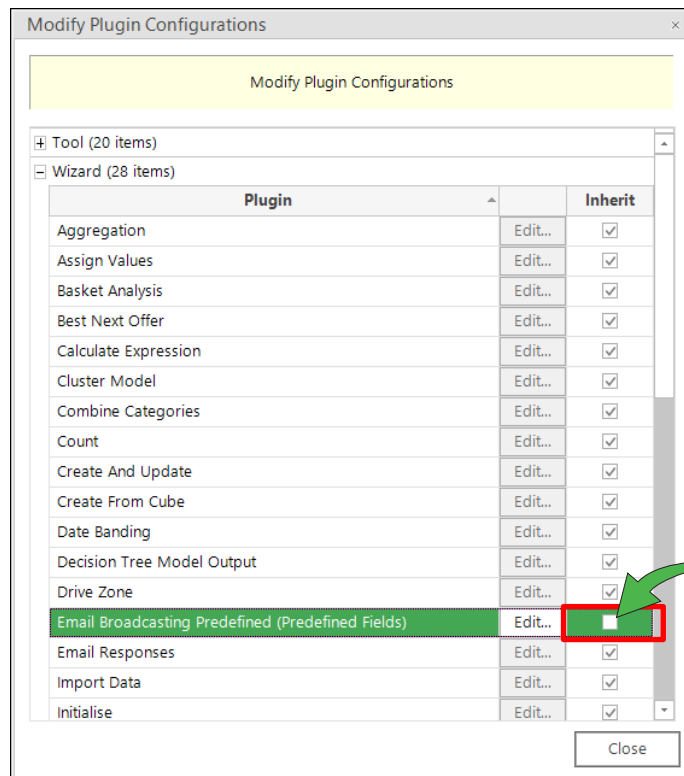


## 4.2 Configuration in FastStats

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



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



3. Click **Add** to add a new template

**Email Broadcasting**

Name:   Visible In Toolbox

Tooltip Text:

Image Path:

Group:  Order Within Group:

Group Order:

Name
------

Templates

4. Enter a **Name**, select the appropriate **Resolve Table** from the drop-down and select **Aestra** from the Broadcaster drop-down.

**Edit Template**

Name:

Resolve Table:

Broadcaster:

Known Parameters:

Core Table:  \*

Supplemental Table:

Key Field:  \*

Key	Value
-----	-------

Parameters:

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

**Note:**  
The Account Username in this dialog is not prefixed with the account name, this will enable the broadcasts to be filtered for that user, the user must be setup in Aestra

Complete the template parameters form with the required settings for your Adestra account.

Table 3 – Edit Template Known Parameters Settings

Parameter	Req	Settings to use
URL	Y	https://new.adestra.com/api/xmlrpc*
Account Username	Y	This is the username that has been setup within Adestra (not prefixed with account name).
Core Table	Y	The name of the Adestra Core Table
Supplemental Table	N	The name of the Adestra Data Table
Key Field	Y	email
Use Dated List	N	True (check-box selected)
Dated List Format	N	yyyyMMdd-HHmms
Workspace	Y	The name of the Adestra Workspace
FTP URL	Y	The FTP LOCATION must match the location that has been set up in Adestra and comply with the format below. <b>Note:</b> All unsafe characters in the USERNAME or PASSWORD must always be URL encoded.
sftp://{USERNAME}:{PASSWORD}@{LOCATION}/{FILENAME}		
SFTP Private Key Path	N	
Upload Empty Lists	N	True (check-box selected)
Max Wait Time	N	7200
Encoding	N	Default

---

**Note:**

\*These settings will be specific to your Adestra account. You may have your own FTP site for uploading to Adestra or use a Client FTP URL provided by Adestra.

---



---

**Note:**

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

---

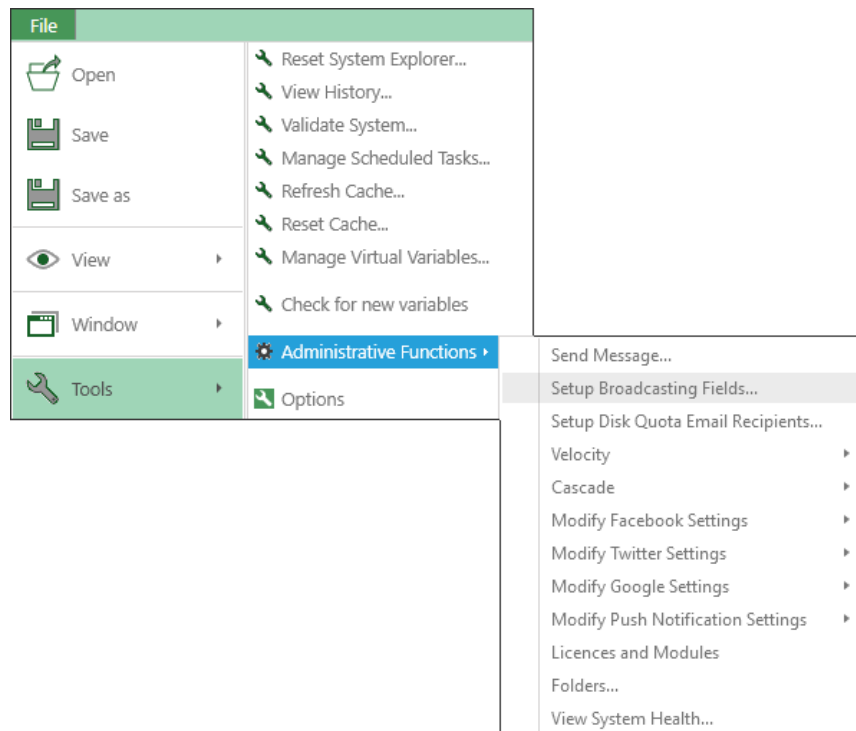
## 4.3 Adding a Predefined Broadcasting Field Set

As Adestra is a predefined digital integrator, you need to define a predefined output sequence which will identify the variables that will be uploaded in your list.

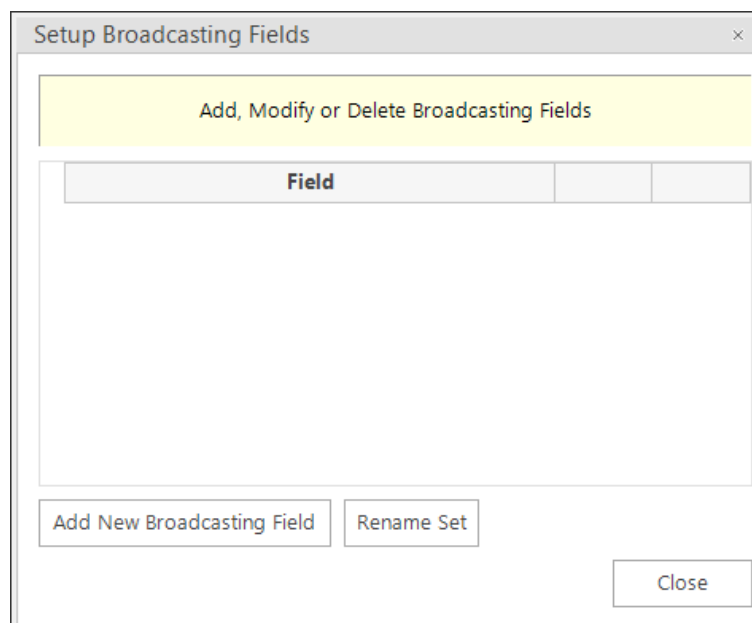
**Note:**

You must set up a message in Adestra before performing this step see **Appendix A Configuring Adestra**.

1. From FastStats select Tools > Administrative Functions > Setup Broadcasting Fields



2. The **Setup Broadcasting Fields** dialogue opens, Click **Add New Broadcasting Field**



3. Enter the **Set Name** to match the **Template Name** in Adestra

**Note:**

Use the **Set Name** to associate each new output field with a Set

1. Click **Add New Broadcasting Field** and complete each **Update Broadcasting Field** dialogue until the list of broadcasting fields is complete

Table 4 – Predefined Broadcaster Output Sequence Fields

Parameter	Settings to use
Set Name	Template name in Adestra
Variable	Select the <b>Variable</b> that you wish to include in your sequence
Header (Required for Adestra)	Use the <b>Header</b> field to give the variable a name so that it matches the <b>field name</b> in either your Adestra <b>Core Table</b> or <b>Data Table</b> within your profile
Output Style	Select to either the <b>Code</b> or <b>Description</b> from the <b>Output Style</b> drop-down.
Output Unclassified as Spaces	Select this check-box if you wish unclassified values to appear as spaces or if this variable is an email or SMS field
Email Field	Select this check-box when defining the <b>Email</b> field.
SMS Filed	Select this check-box when defining the <b>SMS</b> field.
Sequence Id	The Sequence ID allows you to order your variables in the set.

4. At least one of the fields must be an Email Address

Add Broadcasting Field

Set Name:

Variable:

Header (optional):

Output Style:

Output Unclassified as Spaces

Email Field

SMS Field

Sequence Id:

**Note:**

You can create multiple templates and sets and then reference these separately from your email broadcasts.

Setup Broadcasting Fields

Add, Modify or Delete Broadcasting Fields

[-] Set Name : Aestra (3 items)

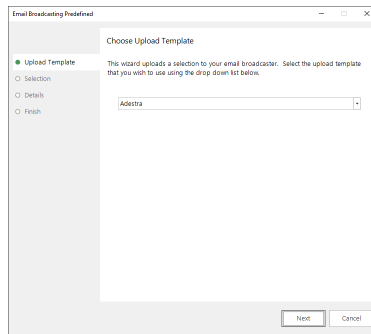
Field		
Person URN	Edit...	Delete...
Surname	Edit...	Delete...
▶ Email Address	Edit...	Delete...

[+] Set Name : Elaine (3 items)

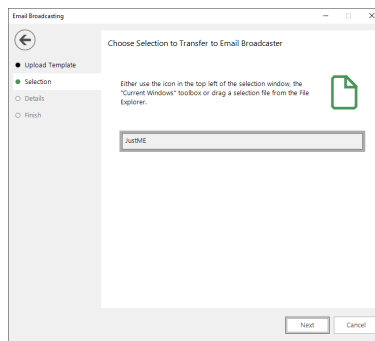
## 4.4 Checking your configuration

To use the Email Broadcasting Wizard, select the Email Broadcasting icon from the Output Wizards section on the Wizards panel. This will send a test email.

1. Select the Upload Template, if you have multiple upload sequences configured select the template from the drop down list and click **Next**. Otherwise, you will be taken straight to the **Selection** step



2. Drag a selection from FastStats with the contact/s you wish to send a test message to

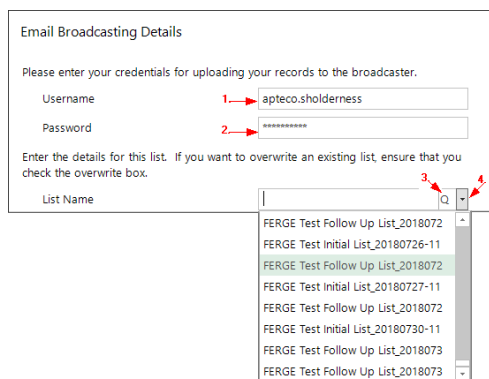


---

### Tip:

#### Email Broadcasting Details Form

1. Enter the Username
2. Enter the Password
3. Click the List Name retrieve button
4. After a short while you should be able to use the drop-down list to see the available lists from Adestra



If you do not see a list do not proceed, something is wrong in a previous configuration.

3. Complete the **Email Broadcasting Details** form then click **Finish**

Table 4 – EmailResponseGatherer.exe.config Settings

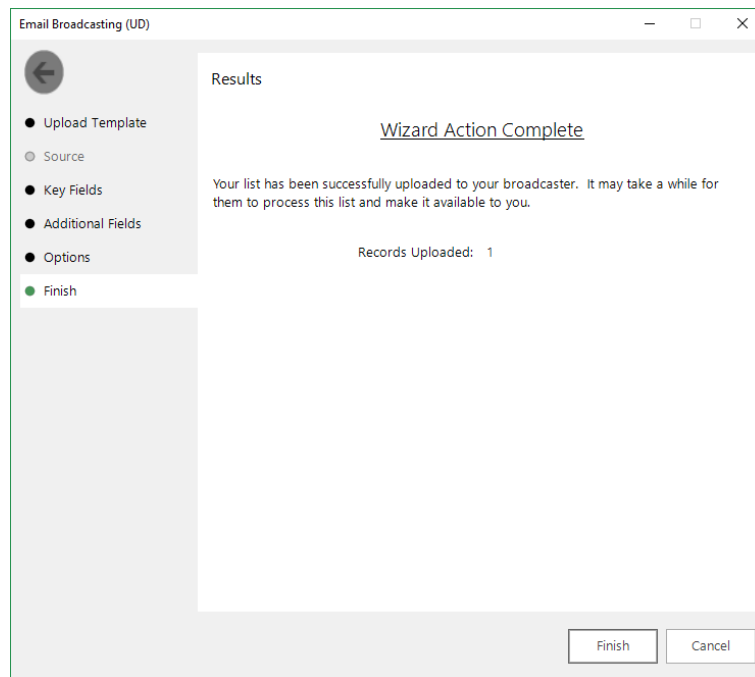
Option	Settings to use
<b>Username</b>	A username from your Aestra account prefixed by your account name. e.g. <b>accountname.username</b>
<b>Note:</b> Prefix the username with the account name followed by a full stop	
<b>Password</b>	The password for your Aestra account
<b>List Name</b> drop-down	Click on the <b>List Name</b> retrieve button and select a list from the drop-down (this appends any new records to the list) or enter a new <b>List Name</b>
<b>Message Name</b>	Click on the <b>Message Name</b> retrieve button and select one from the drop-down or leave it blank if you only want to upload your list
<b>A copy of the list will be saved to the directory below</b>	Browse to the location where you wish to save a copy of the list
<b>Email Address</b>	Enter an Email Address, FastStats will use this to notify you once the list has been processed and then click <b>Next</b>

- If you entered a message name, a Broadcast Warning message displays meaning this will send a message to your target audience

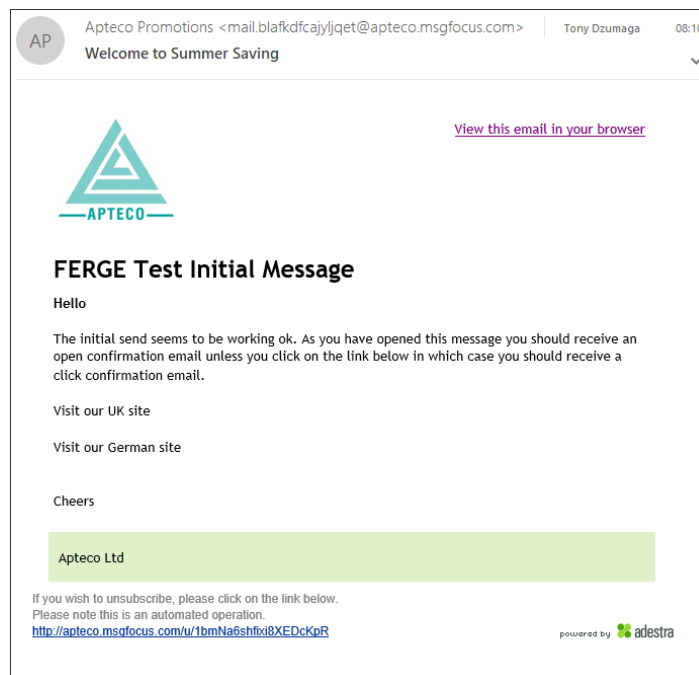
Click **Yes** to commit this action



- 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.



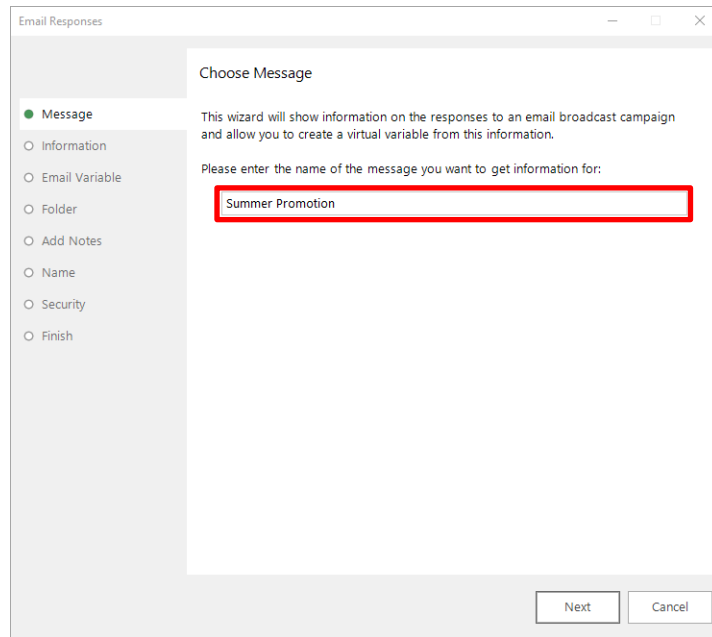
- The recipients in your selection should receive an email using the template from Adestra



## 4.5 Email Responses Wizard

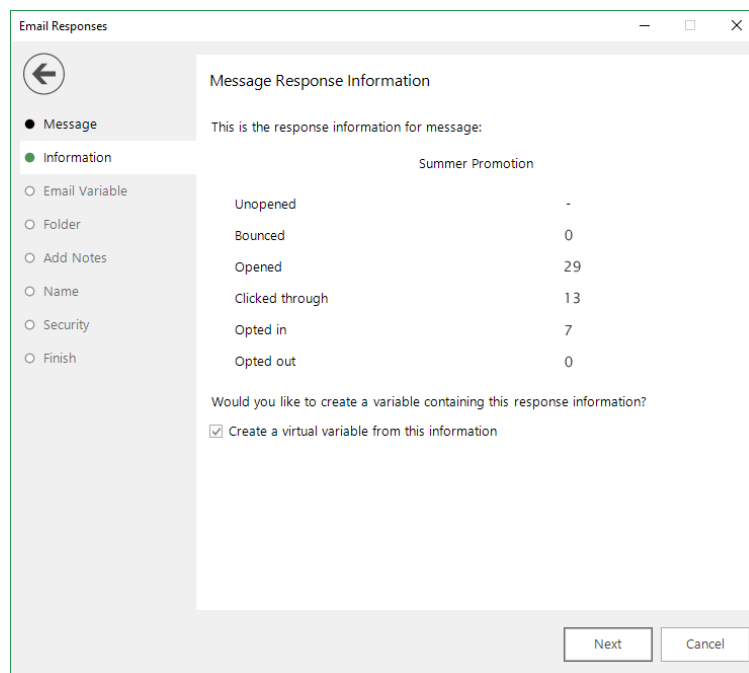
When your emails have been sent out you can start analysing the responses from your target audience.

1. Open the **Email Responses** wizard
2. Enter the name of the message that you used in the Email Broadcasting wizard and click **Next**



The screenshot shows the 'Email Responses' wizard window. On the left is a sidebar with a list of steps: Message (selected), Information, Email Variable, Folder, Add Notes, Name, Security, and Finish. The main area is titled 'Choose Message' and contains the following text: '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:'. Below this text is a text input field containing 'Summer Promotion', which is highlighted with a red rectangular border. At the bottom right of the window are 'Next' and 'Cancel' buttons.

3. As the Email Response Gatherer starts collecting information from Aestra, 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



The screenshot shows the 'Email Responses' wizard window at the 'Message Response Information' step. The sidebar on the left now has 'Information' selected. The main area is titled 'Message Response Information' and contains the text: 'This is the response information for message: Summer Promotion'. Below this is a table with the following data:

Unopened	-
Bounced	0
Opened	29
Clicked through	13
Opted in	7
Opted out	0

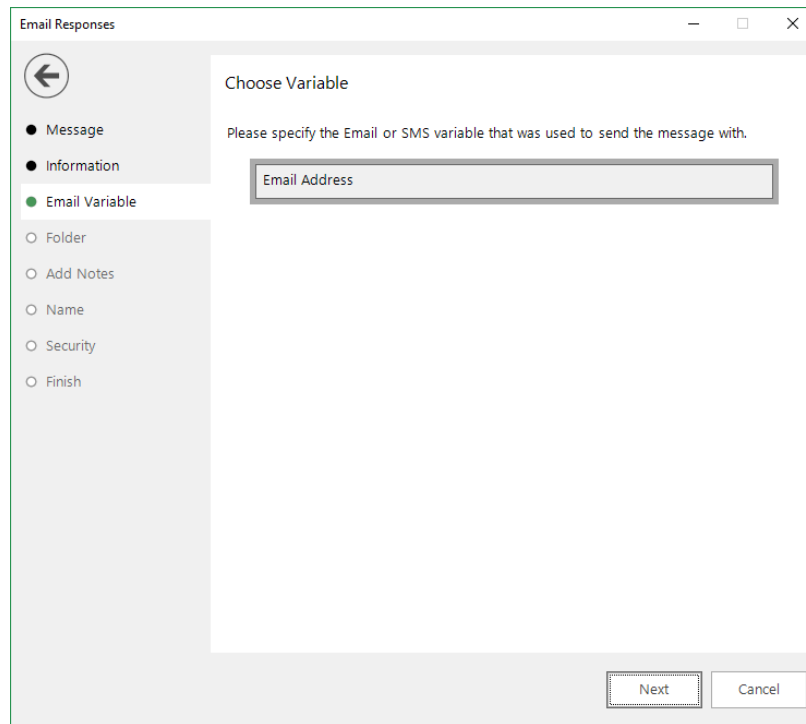
Below the table, there is a question: 'Would you like to create a variable containing this response information?' with a checked checkbox labeled 'Create a virtual variable from this information'. At the bottom right of the window are 'Next' and 'Cancel' buttons.

4. Drag the Email variable that you used in the Email Broadcasting wizard onto the drop box and click **Next**

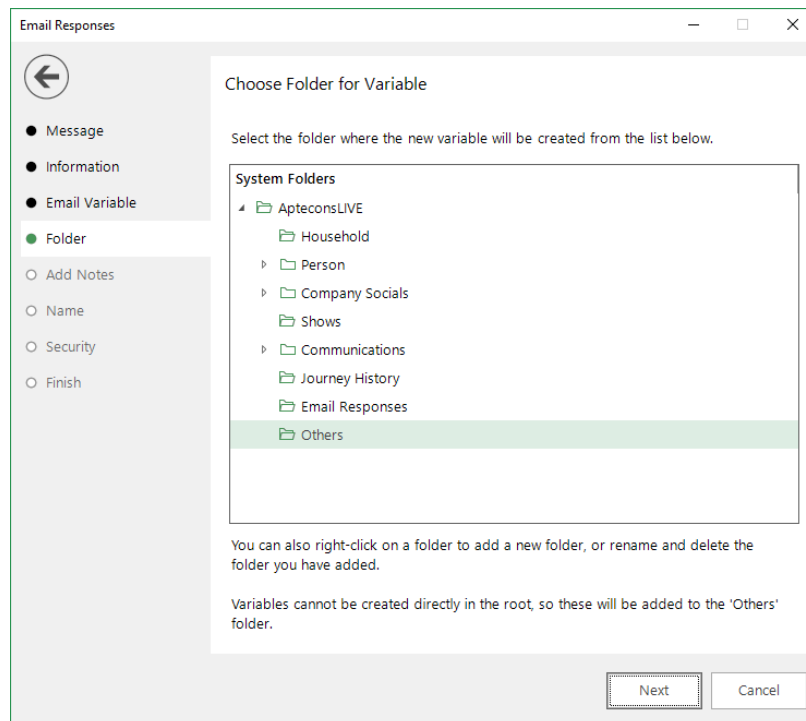
### Choose Variable

Please specify the Email or SMS variable that was used to send the message with.

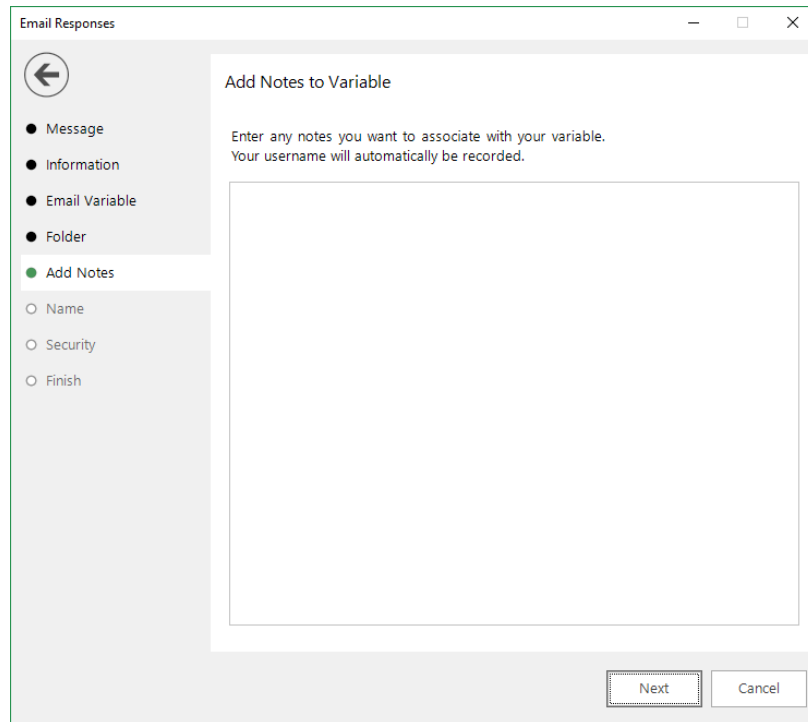
Drop your variable here



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

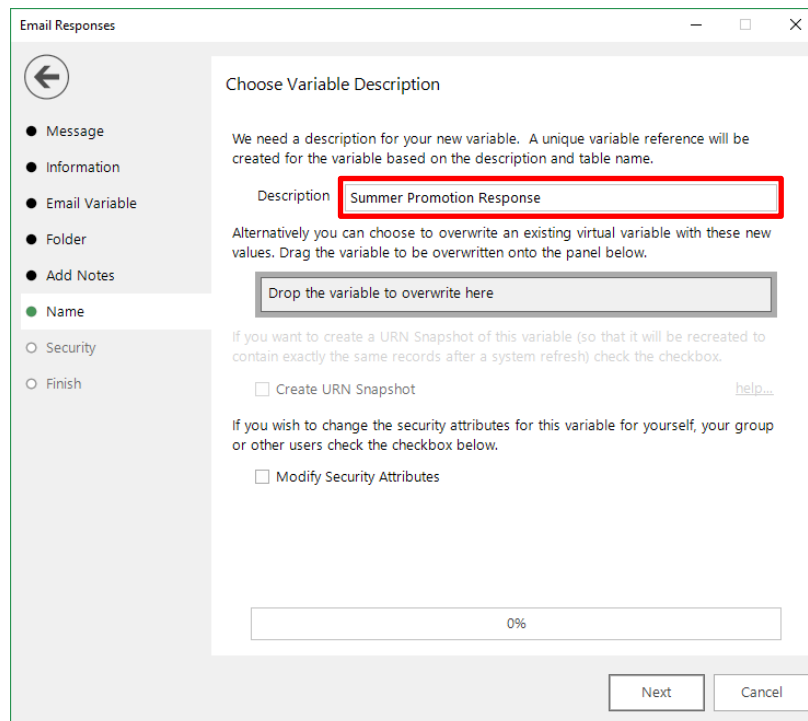


6. Enter any notes that will be stored along with the virtual variable and click **Next**



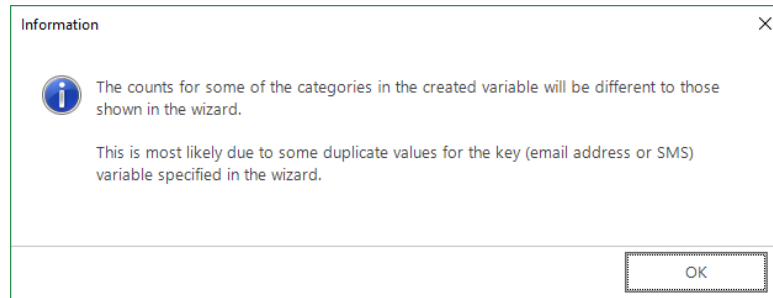
The screenshot shows a dialog box titled "Email Responses" with a sidebar on the left containing a back arrow and a list of steps: Message, Information, Email Variable, Folder, Add Notes (highlighted with a green dot), Name, Security, and Finish. The main area is titled "Add Notes to Variable" and contains the text: "Enter any notes you want to associate with your variable. Your username will automatically be recorded." Below this text is a large empty text area. At the bottom right, there are "Next" and "Cancel" buttons.

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**

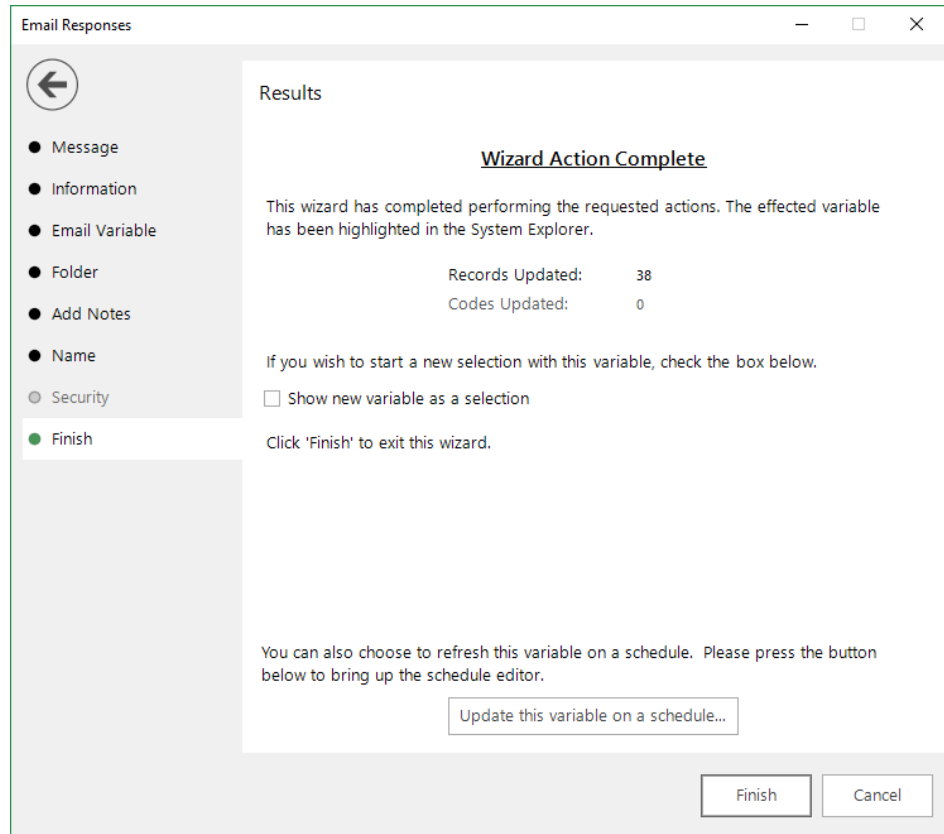


The screenshot shows the "Email Responses" dialog box at the "Choose Variable Description" step. The sidebar on the left has "Add Notes" highlighted with a green dot and "Name" selected with a radio button. The main area is titled "Choose Variable Description" and contains the text: "We need a description for your new variable. A unique variable reference will be created for the variable based on the description and table name." Below this is a "Description" label followed by a text input field containing "Summer Promotion Response", which is highlighted with a red border. Further down, there is a grey box labeled "Drop the variable to overwrite here". Below that, there are two checkboxes: "Create URN Snapshot" (unchecked) and "Modify Security Attributes" (unchecked). At the bottom right, there are "Next" and "Cancel" buttons.

8. Click **OK**



9. Click **Finish**

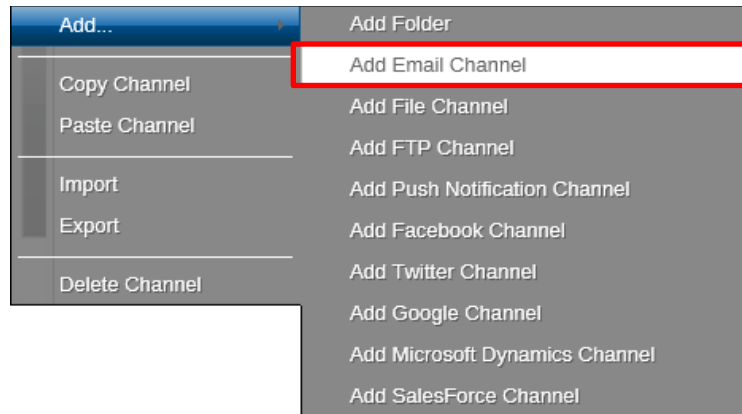


# 5 PeopleStage Broadcasting & Responses

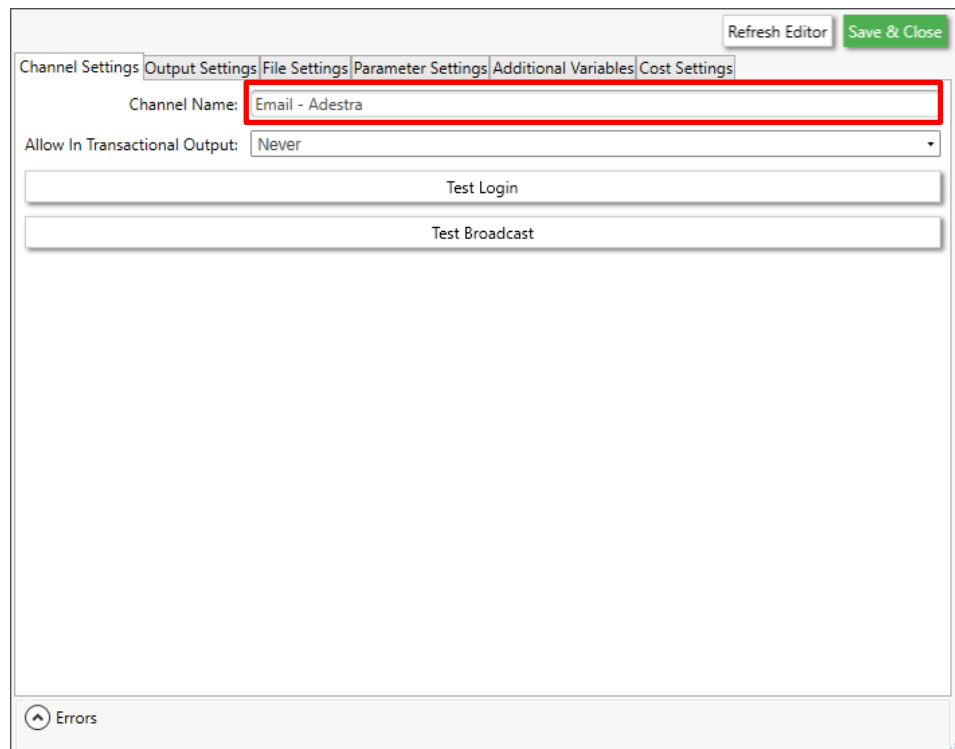
## 5.1 Defining the Broadcast Channel in PeopleStage

To use Adestra with PeopleStage, you must set up a channel that defines the settings and parameters and any fields that you always want to send to Adestra.

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



2. Enter a name in **Channel Name**



**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)

3. Define Output Settings for Adestra

Table 5 –PeopleStage Output Settings

Field	Settings
Broadcaster	Select <b>Adestra</b> from the drop-down
Username	Enter your <b>API username (accountname.username)</b>
<b>Note:</b> Prefix the username with the account name separated by a full stop	
Password	Enter your <b>API password</b>
Variable Name	Select <b>Email Address</b> 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 Adestra
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 Adestra.
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**

There are validation errors indicated in red Refresh Editor Save & Close

Channel Settings | Output Settings | **File Settings** | Parameter Settings | Additional Variables | Cost Settings

Zip File

Output File Format: Comma Separated Values (CSV)

Output Header: Descriptions

Delimiter: Tab

Alpha Encloser: None

Numeric Encloser: None

Extras:

Encoding: utf-8

Errors

- Parameter ApiBase has no value set
- Parameter FTPUsername has no value set
- Parameter FTPPassword has no value set

**Note:**

The default Encoding is Windows-1252 if you change use the same setting on the **Parameter Settings** tab



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

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

Parameter Name	Parameter Value
Core Table	MyCoreTable Core Table
Key Field	email
Workspace	MyWorkspace
FTP URL	sftp://username:pwd@ftp.apteco.com/folder/{FILENAME}
Use Dated List	true
Upload Empty Lists	false
Encoding	UTF8
Supplemental Table	MyDataTable Data Table

CORETABLE=MyCoreTable Core Table;KeyField=email;Workspace=MyWorkspace;FTPURL=sftp://username:pwd@ftp.apteco.com

Table 6 –Example PeopleStage Parameter Settings

Field	Settings
	*Example, these will be specific to your account
Workspace	The Adestra <b>Workspace</b> to use
Core Table	The Adestra <b>Core Table</b> name
Supplemental Table	The Adestra <b>Data Table</b> name
Key Field	email
FTP URL	The FTP LOCATION must match the location that has been set up in Adestra and comply with the format below. <b>Note:</b> All unsafe characters in the USERNAME or PASSWORD must always be URL encoded.  sftp://{USERNAME}:{PASSWORD}@{LOCATION}/{FILENAME}
Use Dated List	If set to “true” you will create a new list in Adestra for each broadcast
Upload Empty Lists	false
Encoding	UTF8
Account Username	(Optional) You can specify a username to associate the list and filter the broadcast for a user, the user must be setup within Adestra

See **Appendix B** for all the available parameters

6. Add any additional variables on the **Additional Variables** tab

There are validation errors indicated in red

Refresh Editor Save & Close

Channel Settings Output Settings File Settings Parameter Settings **Additional Variables** Cost Settings

Variable Name	Variable Description	Output Type	Formatting	Unclassified as blank
Forename (PeForena)	First Name	-	No Formatting	-
Select a Variable		-	-	-

- ▶ Household
- ▶ Person
- ▶ Company Socials
- ▶ Shows
- ▶ Communications
- ▶ Journey History
- ▶ Email Responses
- ▶ Others

Add Additional Variables Directly

Additional Variables Location: End

Errors

An additional variable () can't be found in the FastStats system

7. Click **Save & Close**

Refresh Editor **Save & Close**

Channel Settings Output Settings File Settings Parameter Settings **Additional Variables** Cost Settings

Variable Name	Variable Description	Output Type	Formatting	Unclassified as blank
Forename (PeForena)	First Name	-	No Formatting	-
Surname (PeSurnam)		-	No Formatting	-
Click here to add new item				

Add Additional Variables Directly

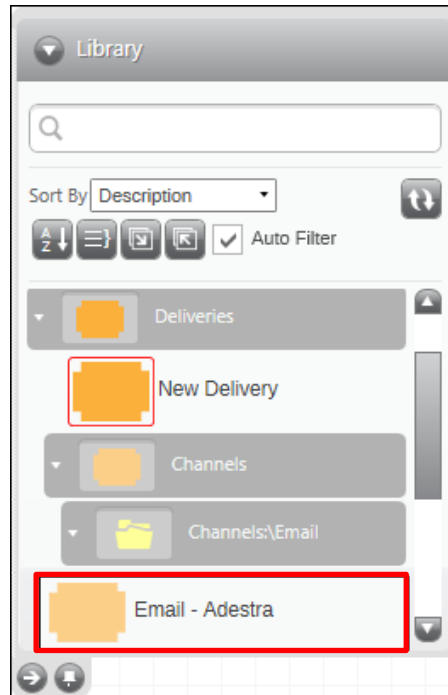
Additional Variables Location: End

Errors

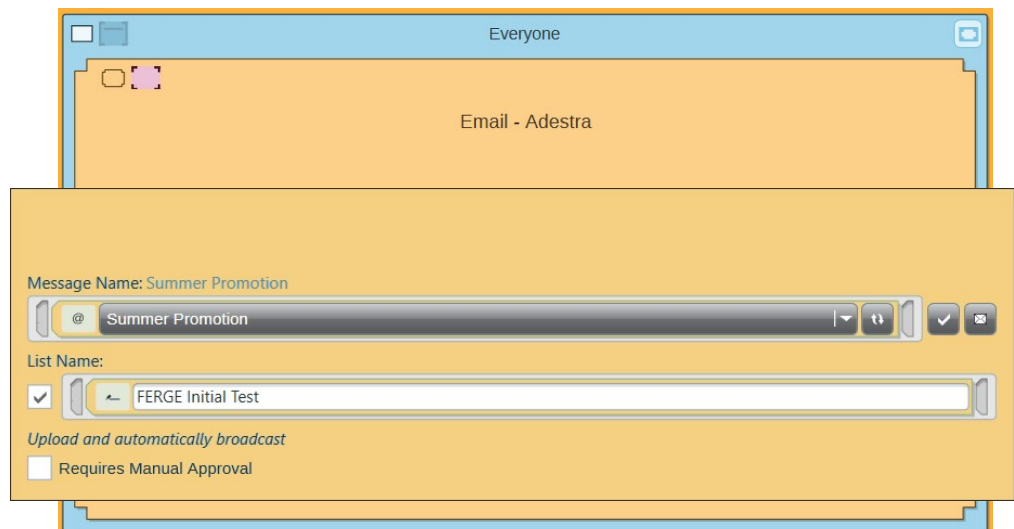
## 5.2 Broadcasting in PeopleStage

You can now test your channel at any Delivery Stage

1. You can drag your new Aestra channel from the Library to your Delivery step



2. You can select from the available messages in Aestra from the Message Name drop-down or use PeopleStage’s functionality to dynamically select a message, to use a different language for example.



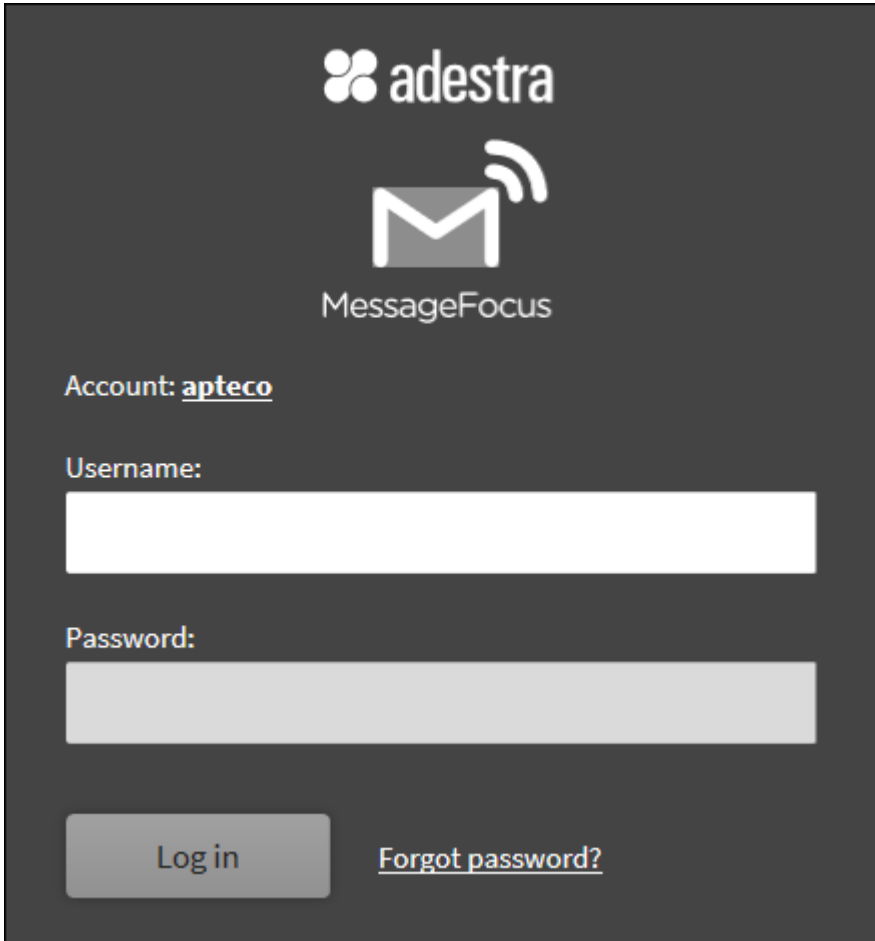
3. You can use the same **List Name** as the **Message Name** or define a custom one  
Selecting the **Requires Manual Approval** check box gives the option to view a sample list before processing

# Appendix A: Adestra Configuration

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

If you wish to automatically broadcast the list to a message either from the Email Broadcast wizard or PeopleStage, you need to create a Workspace, Project, and a Campaign with a message within Adestra. Also to collect responses you will need to setup an Export to create a Report.

1. Login to your Adestra account to access the web-based control panel



adestra

MessageFocus

Account: apteco

Username:

Password:

Log in [Forgot password?](#)

---

**Note:**

This section uses a specific example to show the areas that need to be setup in Adestra, your setup will likely be different, please contact Adestra support or the Adestra help for additional information.

---

## Tables in Aestra

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**

Table 7 –Example Core Table Fields

Field	Description
	*Example, these will be specific to your account
email	Active email address* (Dedupe field in Settings)
person_urn	
forename	Contact's forename
surname	Contact's surname
title	Contact's title

### Data Table

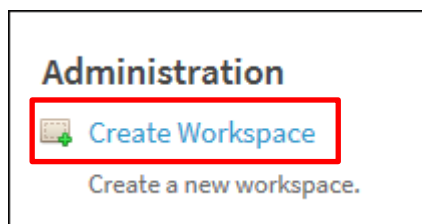
This table stores additional parameters for PeopleStage and any custom fields, it is referenced in the Broadcaster's Plugin Upload Template as **Supplemental Table**

Table 8 –Example Data Table Fields

Field	Description
	*Example, these will be specific to your account
Communication_key	Active email address* (Dedupe field in Settings)
subject	
fergecontent	Contact's forename
Run_number	Contact's surname

## Setting up a Campaign in Aestra

1. From: **Campaigns** go to *workspaces* > *Administration* > *Create Workspace*

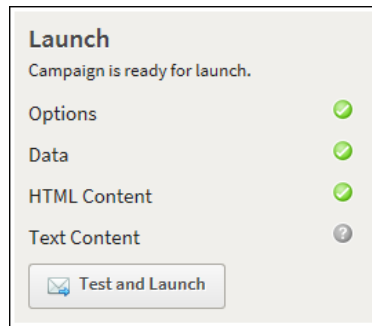


The **Create Workspace** page opens

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

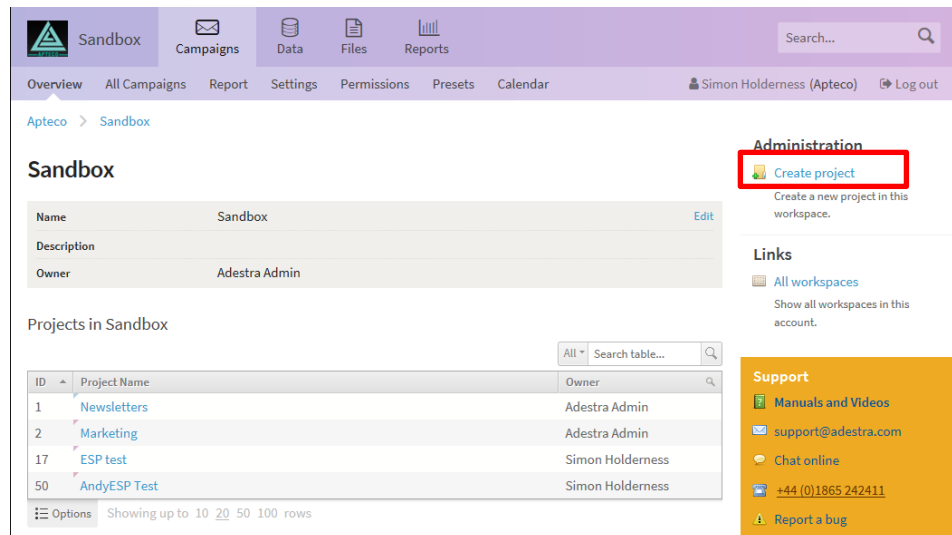
**Note:**

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

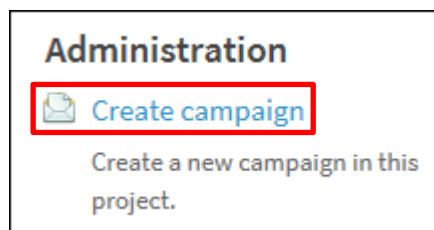


For example, you will also need to specify a List

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



5. From: **Project** go to **Administration > Create Campaign**



6. 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 ⓘ

Owner (required) ⓘ

Tags

Once complete, click **Save**

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

The screenshot shows a web interface for configuring campaign options. At the top, there is a breadcrumb trail: Apteco > Sandbox > ESP test > Summer Saver Promotion > Options. A 'Back to Summer Saver Promotion' link is located below the breadcrumb. The main heading is 'Campaign Options'. The form contains several sections: 'Subject line (required)' with a text input field containing 'Welcome to Summer Saving'; 'Domain (required)' with a dropdown menu showing 'apteco.msgfocus.com'; 'From Address' section with 'From name (required)' text input containing 'Apteco Promotions' and a checkbox for 'Use a custom from address'; 'From prefix' text input containing 'mail'; 'Reply Address' section with a checkbox for 'Use a custom reply address'; 'Unsubscribe handling' section with two checked checkboxes: 'Insert unsubscribe link into text parts' and 'Insert unsubscribe link into HTML parts'; 'Unsubscribe page URL' text input field; 'Unsubscribe list' dropdown menu showing 'Default Unsubscribers'; and 'Suppression lists' section with three checkboxes: 'Default Unsubscribers' (checked), 'Marketing Unsub List' (checked), and 'Newsletter Unsub List' (unchecked). A 'Save' button is located at the bottom right of the form.

**Note:**

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



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

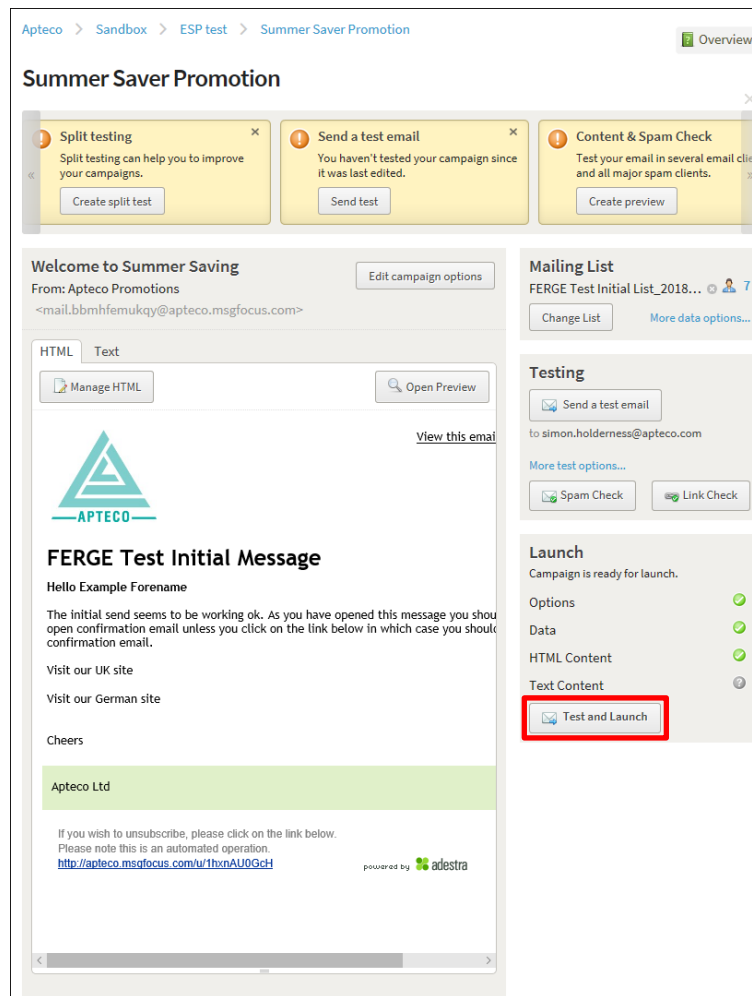
The screenshot shows the Aestra campaign editor interface for a campaign titled "Summer Saver Promotion". The breadcrumb navigation at the top reads "Apteco > Sandbox > ESP test > Summer Saver Promotion". There is an "Overview" button in the top right corner.

The main content area is divided into several sections:

- Select a mailing list:** A panel with a warning icon and the text "You can select an existing list, or create a new one." It contains "Select List" and "Create List" buttons.
- Add content:** A panel with a warning icon and the text "Add some HTML or text content to your campaign." It contains "Add HTML" and "Add Text" buttons.
- Split testing:** A panel with a warning icon and the text "Split testing can help you your campaigns." It contains a "Create split test" button.
- Message Preview:** A section showing the email content. The subject is "Welcome to Summer Saving" and the sender is "Apteco Promotions". Below the preview, there are tabs for "HTML" and "Text". A message states "This campaign has no HTML content" with a "Create HTML content" button.
- Mailing List:** A panel with a red border, showing "No list selected" and buttons for "Select List" and "Create new list".
- Launch:** A panel with the text "Before your campaign can be launched, please address the errors below." It lists three items: "Options" (with a green checkmark), "Data" (with a red minus sign and "No list selected"), and "Content" (with a red minus sign and "No HTML or text content").

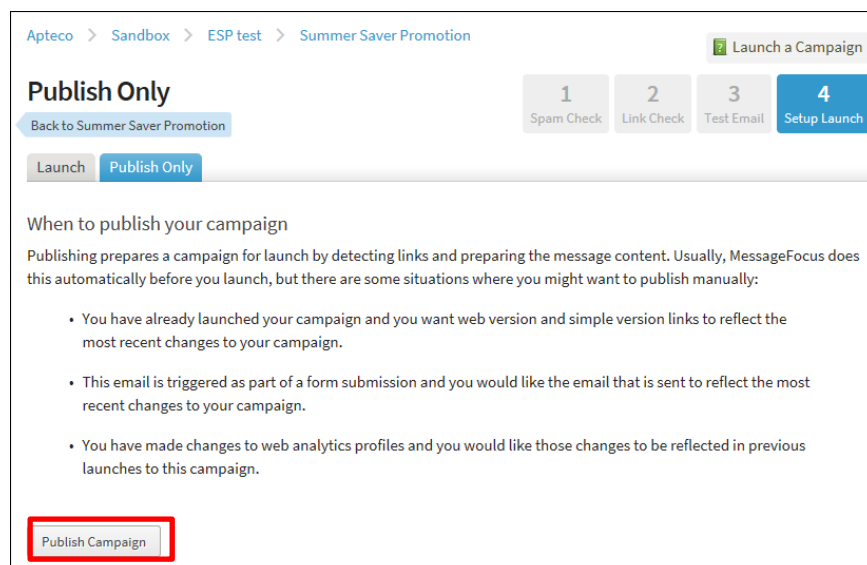
9. You will also need to select a mailing list, when all the required options have been configured the **Test and Launch** button displays.

10. Before you can run a campaign from FastStats or PeopleStage, you need to publish the message.



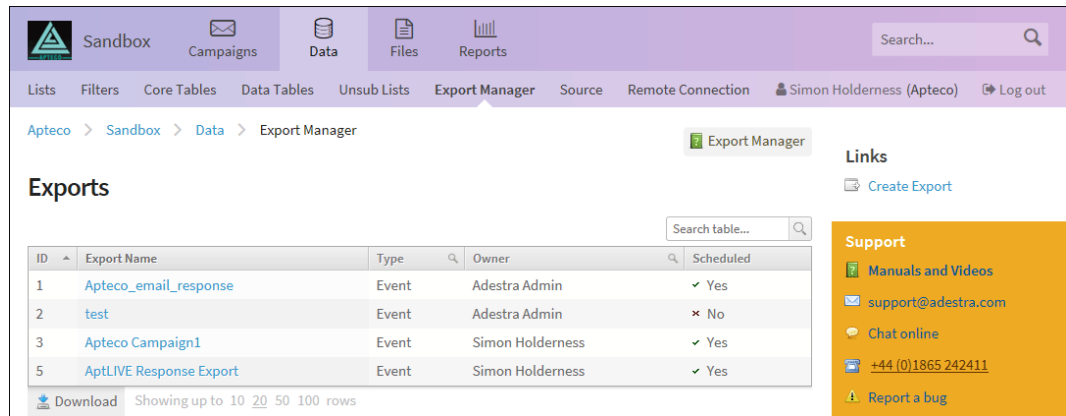
11. Click **Test and Launch** and select step 4 **Setup Launch**

12. Select the **Publish Only** tab and click **Publish Campaign**

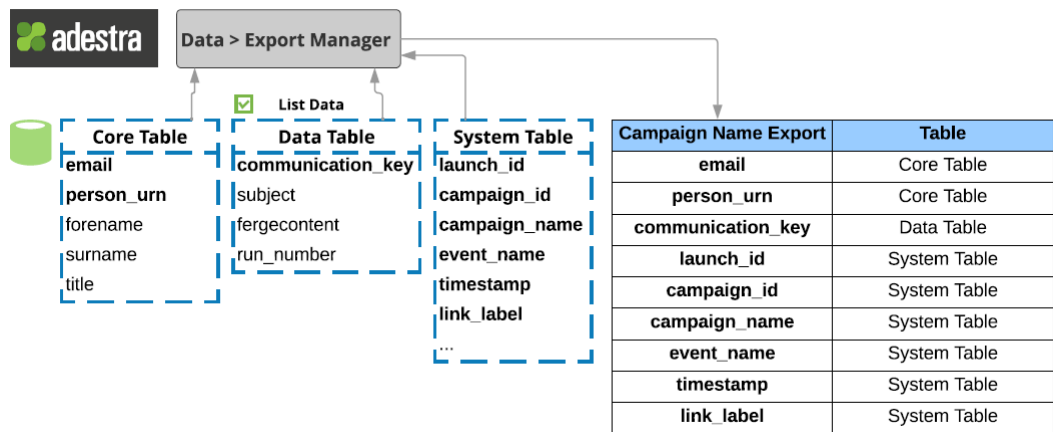


## Configuring the Export Manager

1. Select **Export Manager** from the **Data** menu



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



## Appendix B: API Parameters

Table 9 – Email Response Gatherer Parameters

Parameter	Required	Default	Description
FTPURL	Y		The ftp location where your Adestra responses are generated.

The following data is inserted into the FastStats Email Response Table as part of the predefined configuration, you can optionally override the settings by adding them in the FastStats Email Response Configurator

	Required	Response Table field (defaults shown*)	Adestra extract file column
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	N	Response*	Allows you to filter your responses to specific types when reading files from the ftp site
EMAILCOLUMNNAME	N	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	N		Reserved for future use
TYPECOLUMNNAME	N	MessageType	Response type
MESSAGENAMECOLUMNNAME	N		The message name is not returned in the Adestra extract file, but a reference is, this should typically be left as the default value
DELIVERYDATECOLUMNNAME	N	DeliveryDate	Delivery date
CLICKURLCOLUMNNAME	N	ClickUrl*	The name of the URL that was clicked
CLICKDATECOLUMNNAME	N	ClickDate*	Date the link was clicked
EVENTTRIGGEREDDATECOLUMNNAME	N	EventTriggeredDate	Date the response occurred
TYPE	N		This allows you to restrict thae data downloaded to a specific type of response: <ul style="list-style-type: none"> <li>• Open</li> <li>• Bounce</li> <li>• Click</li> </ul>
<b>Adestra Functionality</b>			
UpdateManualBroadcasts	N		Adestra also lets you check for responses to campaigns that have not been sent via PeopleStage by setting this to true, the default value is false
CheckForPhasedBroadcasts	N		Adestra can also send phased broadcasts, i.e. staggered over time or at optimum times. They are sent using the same broadcastId but have different send times. Set this to true to use this feature, default value is false

**Note:**

\*These settings are specific to each account and must match the name configured in Adestra.

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	N	Tab	Type of delimiter used in the extract file, options include: <ul style="list-style-type: none"> <li>• COMMA (,)</li> <li>• DOUBLEQUOTE ("")</li> <li>• NULL.</li> <li>• SEMI (;)</li> <li>• SPACE ( )</li> <li>• SINGLEQUOTE ('')</li> <li>• TAB</li> </ul>
ENCLOSER	N	None	Type of enclose used in the extract file
TreatTypeAsAdditionalField	N	false	Setting this to true will force the raw response type to be written to the <b>ResponseDetails</b> table before any conversion is carried out
TreatMessageNameAsAdditionalField	N	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 Ids will be fetched and cached as and when required
OnlyProcessRecordsWithBroadcastId	N	false	Setting this to true will force the Email Response Gatherer to only download responses to messages that have originated from FastStats. The default option is false; all responses will be downloaded.

Table 10 – Email Broadcasting Parameters

Parameter	Required Y/N	Default	Description
FTPURL	Y	Either your own location or one provided by Aestra	The ftp location (including username and password) where your upload will be generated. The FTP LOCATION must match the location that has been set up in Aestra and comply with the format below. <b>Note:</b> All unsafe characters in the USERNAME or PASSWORD must always be URL encoded.
		sftp://{USERNAME}:{PASSWORD}@{LOCATION}/{FILENAME}	
CORETABLE	Y		The Aestra CORE DATA table name. This should refer to the name of your core table as specified in your Aestra configuration
SUPPLEMENTALTABLE	N		The Aestra DATA TABLE table name. This should refer to the name of your supplemental table as specified in your Aestra configuration. If no parameter is supplied, the list name will be used.
WORKSPACE	Y		This should refer to the name of your required workspace
KeyField	Y	email	The field to link the two tables. This should refer to the name of your key field, typically this is the email address field.
PRIVATEKEYPATH	N		If secure ftp is used above and requires a 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 Aestra
UseDatedList	N	true	Setting this to false will remove the date and time stamp at the end of the file name
DatedListFormat	N	yyyMMdd-HHmss	The date format string for the date and time stamp if created
MaxWaitTime	N	7200 (120 minutes)	The maximum time to wait for a list to be imported in seconds
Encoding	N	UTF8	Enter the encoding of the incoming file
EscapeQuotes	N	False	Set this to true to escape quote characters
URL	N	https://new.aestra.com/api/xmlrpc"	The endpoint url for the api calls
AccountUsername	N		Enter a username in order to filter messages and results returned to those available to a particular user. Setting this will also make this user the owner of any uploaded lists. If not set, the api username will be used

# Appendix C: Example Batch File

## Example batch file to use with FERG and scheduling

```
@echo off

REM *****

REM File Name: AestraBatchFile.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 *****

D:

cd D:\FastStats\FERG

cls

SET FERG="%ProgramFiles%\Apteco\FastStats Email Response Gatherer x64\EmailResponseGatherer64.exe"
SET LOGFILE="Logs\Aestra.txt"
SET LOGFILEDETAILS="Logs\Aestra_Details.txt"

echo. >> %LOGFILE%

echo. >> %LOGFILEDETAILS%

echo %date% %time% - Starting FastStats Aestra Response Download >> %LOGFILE%

echo %date% %time% - Starting FastStats Aestra Response Download >> %LOGFILEDETAILS%

echo. >> %LOGFILE%

>> %LOGFILEDETAILS%

echo.

%FERG% Aestra.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 Aestra Responses OK >> %LOGFILE%
```

```
goto Complete
```

```
:FailedLogin
```

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

```
goto Complete
```

```
:FailedDownload
```

```
echo %date% %time% - FastStats Gatherer Failed - Downloading from Aestra >> %LOGFILE%
```

```
goto Complete
```

```
:FailedLogout
```

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

```
goto Complete
```

```
:FailedException
```

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

```
goto Complete
```

```
:Complete
```

```
echo %date% %time% - Completed FastStats Aestra 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: 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\Adestra.xml'.

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

```
%FERG% Adestra.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 Sending During configuration

---

These errors can occur due to an incorrect configuration

**Description:** Error received when using the Predefined Email Broadcasting wizard

**Error:** An error occurred whilst uploading data to your email broadcaster "Unable to upload list due to the following: (Request could not be processed key=api.request,account\_id=) was returned whilst creating a list on Adestra."

**Possible root Cause:** The Plugin Configurations Upload Template may have been configured incorrectly

**Solution:** Ensure all the parameters have been set up correctly, particularly the **Account Username**, this will be different to the API username, i.e. a username only without account prefix.

See Chapter 4.2



For customer service and technical support visit:

[www.apteco.com/support](http://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](mailto:support@apteco.de)  
[www.apteco.de](http://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](http://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](mailto:support@apteco.nl)  
[www.apteco.nl](http://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](mailto:support@apteco.com)  
W: [www.apteco.com](http://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.



Apteco

Apteco

INSIGHT INTO ACTION