



Apteco

Technical Guide

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

acoustic Integration Guide
D054T3X002– June 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 D054T3X002 - June 2018

Acoustic acquired IBM Watson in April 2019 – This integration guide is being updated to reflect any changes brought about by that purchase, please contact your partner or Apteco for information about this integration.

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1 Introduction

This integration guide details the processes required to integrate the Apteco Marketing Suite with the IBM Watson, SilverPop SilverPop 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 SilverPop. Use of the Apteco Marketing Suite in combination with SilverPop 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 SilverPop functionality

Technology

SilverPop integrates with your FastStats system by utilising a RESTful transport over HTTP/S, in conjunction with SFTP.

Supported Integrations

SilverPop supports all the above integration options.

Type of Integration – User Defined

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

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 SilverPop
 - b. API Parameters

You need to configure SilverPop 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:

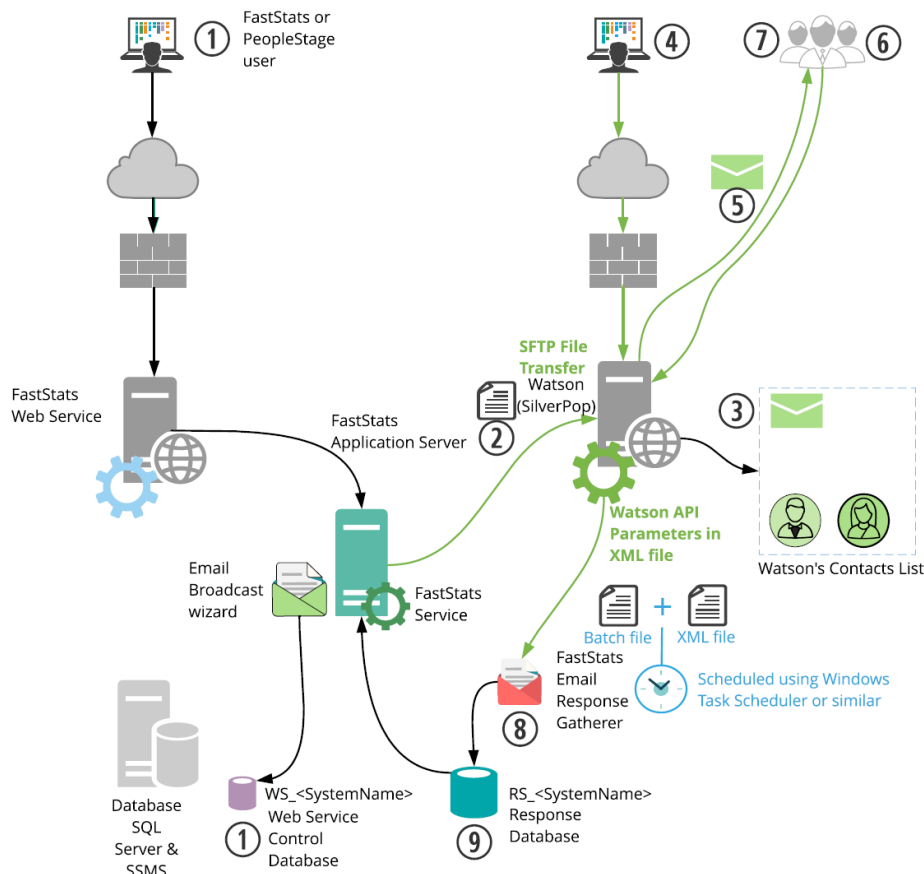
```
<SQLServerInstanceName>;Initial Catalog=RS_<SystemName>;User  
Id=faststats_service;Password=fa5t5tat5;
```
- The **Digital Integration.zip** available from:
<https://www.apteco.com/portal/software-releases>
- Decide where your **FERG folders** are to be created
Used to store the .xml and .bat files 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 SilverPop API Username and Password
- The SilverPop Mailing Name and List Name

2 Process Summary

2.1 Architecture

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

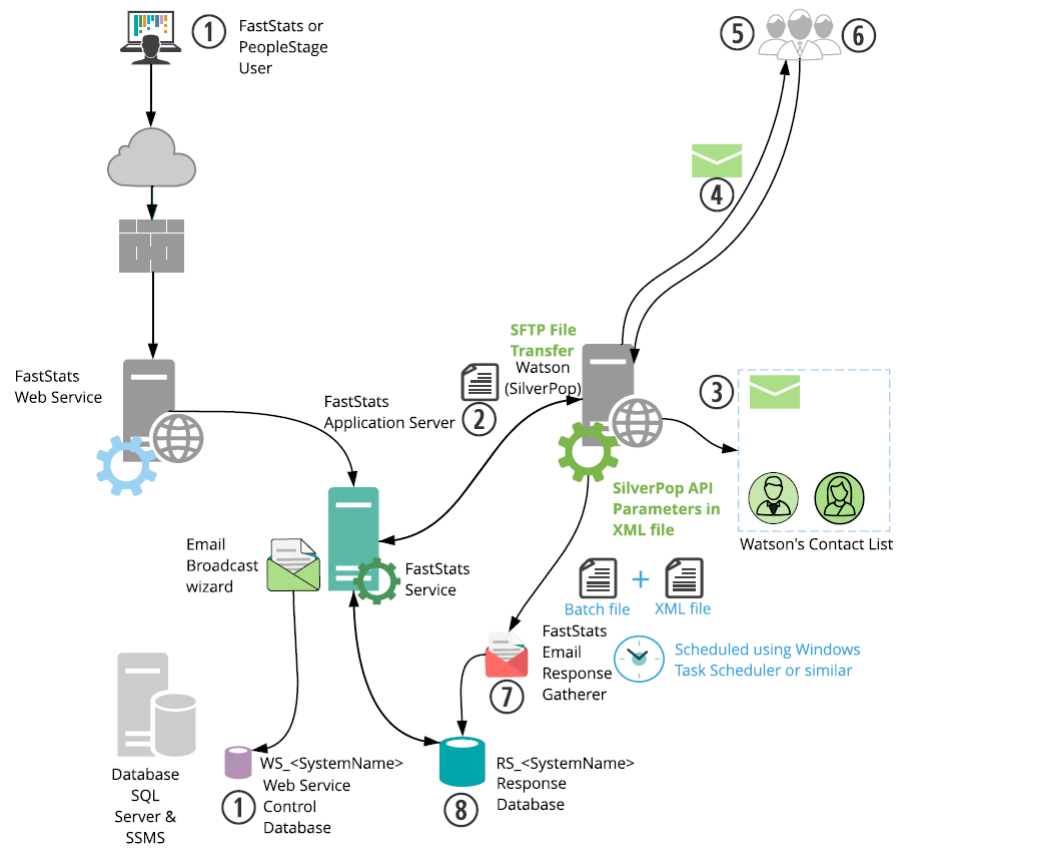
Schematic showing campaign scheduling performed in IBM Watson, SilverPop.



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 IBM Watson, SilverPop SFTP site and then uses RESTful communication to monitor the upload.
3. IBM Watson, SilverPop then imports the contents of this list to its contacts database and associates them with a message name ready for use in any email campaigns.
4. A campaign can then be scheduled using the IBM Watson, SilverPop web interface.
5. IBM Watson, SilverPop sends Messages to all recipients on the list.
6. IBM Watson, SilverPop records any undelivered messages.
7. IBM Watson, SilverPop 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 IBM Watson, SilverPop 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 Contact List and a Message in IBM Watson, SilverPop

3 Apteco System Configuration

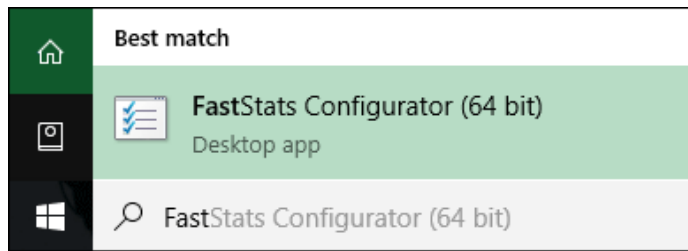
3.1 Creating the Response Database

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

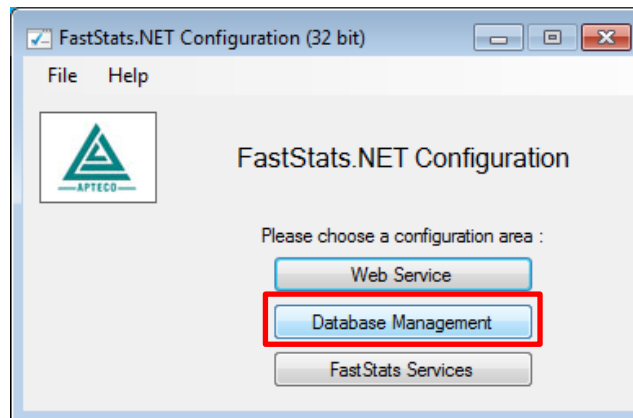
1. Open the FastStats Configurator.

Tip:

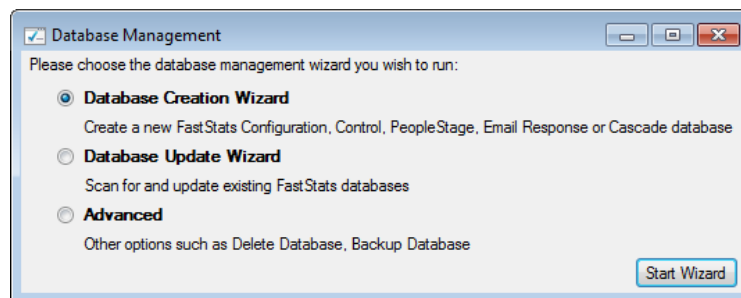
Search for Fast in the Start Menu



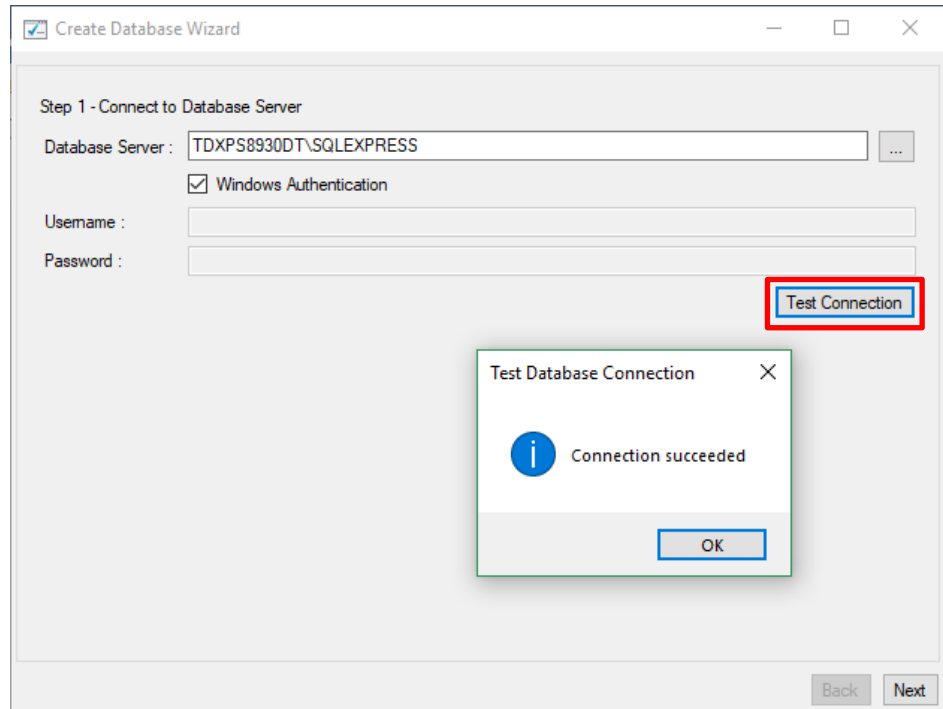
2. Select **Database Management**.



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



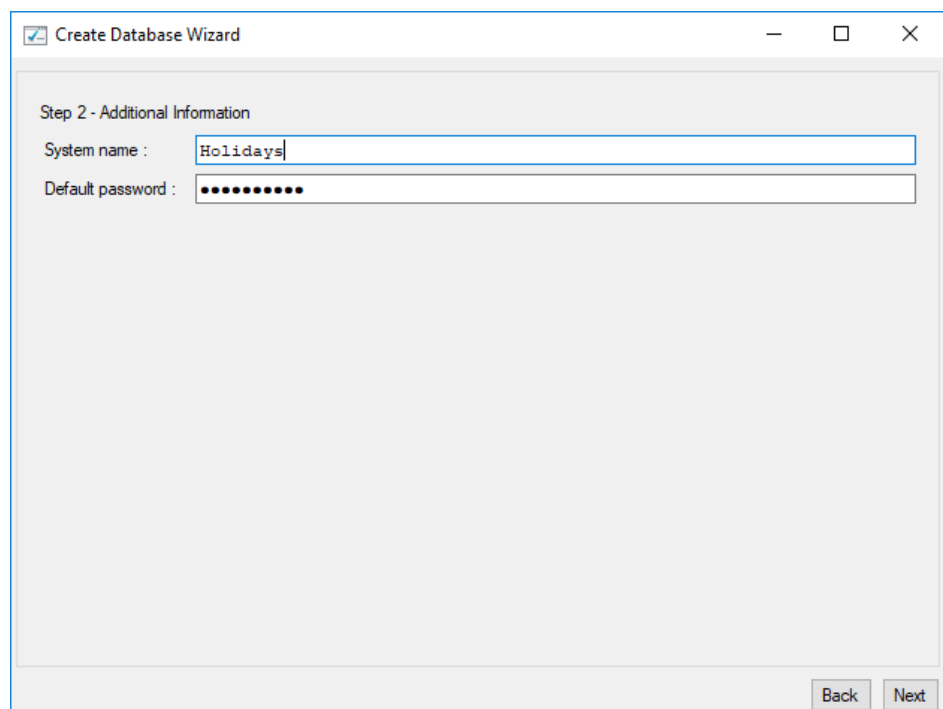
4. Enter the name of the **Database Server** where you wish to store the response database, click **Test Connection**



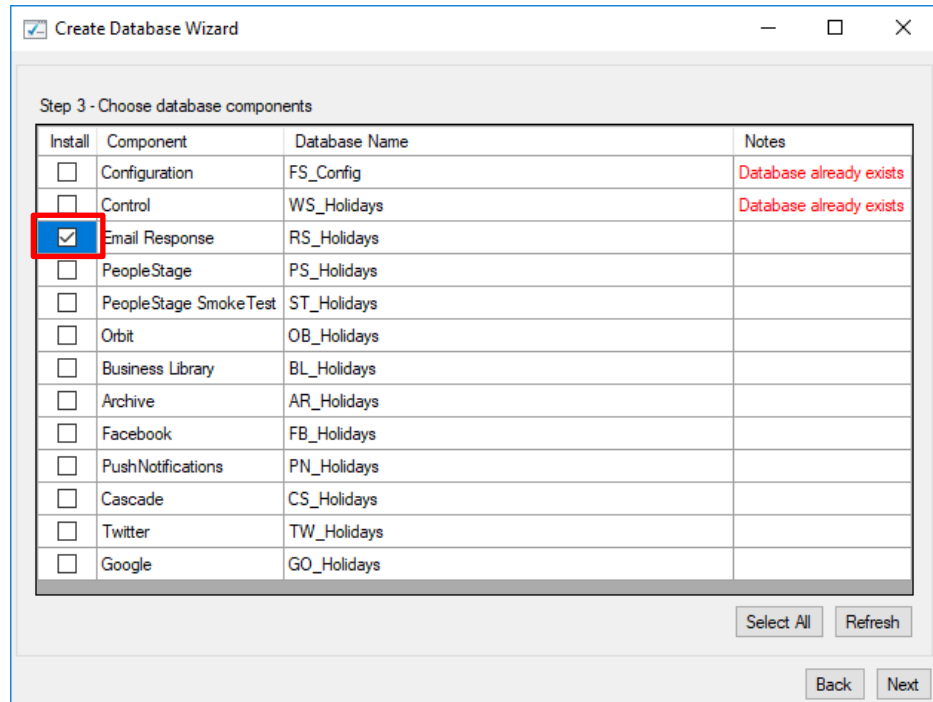
Note:

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.



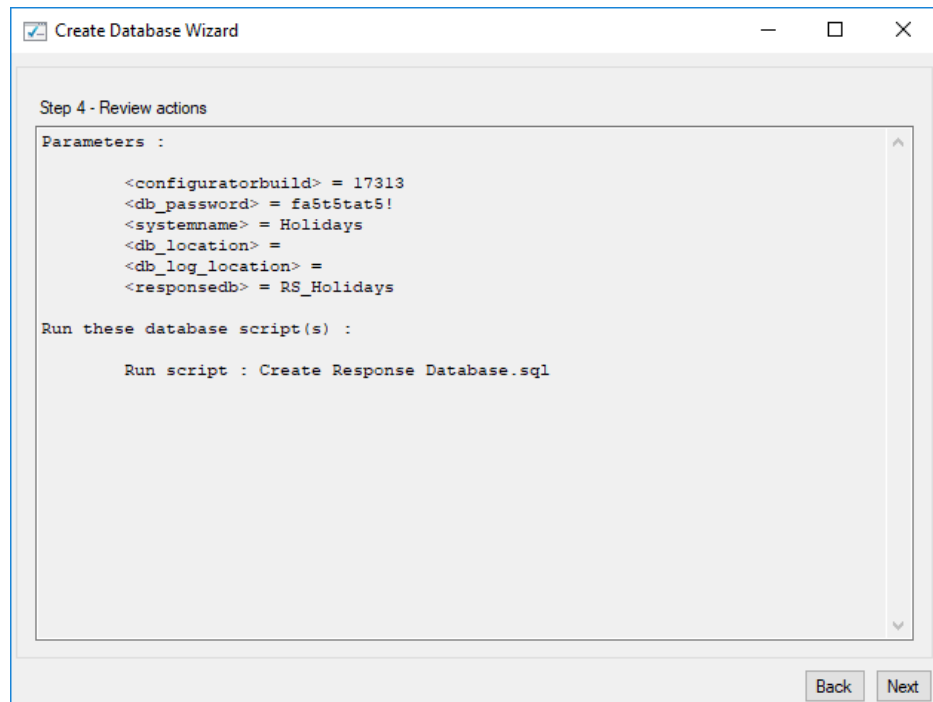
6. Select the **Email Response** check box, then click **Next**.

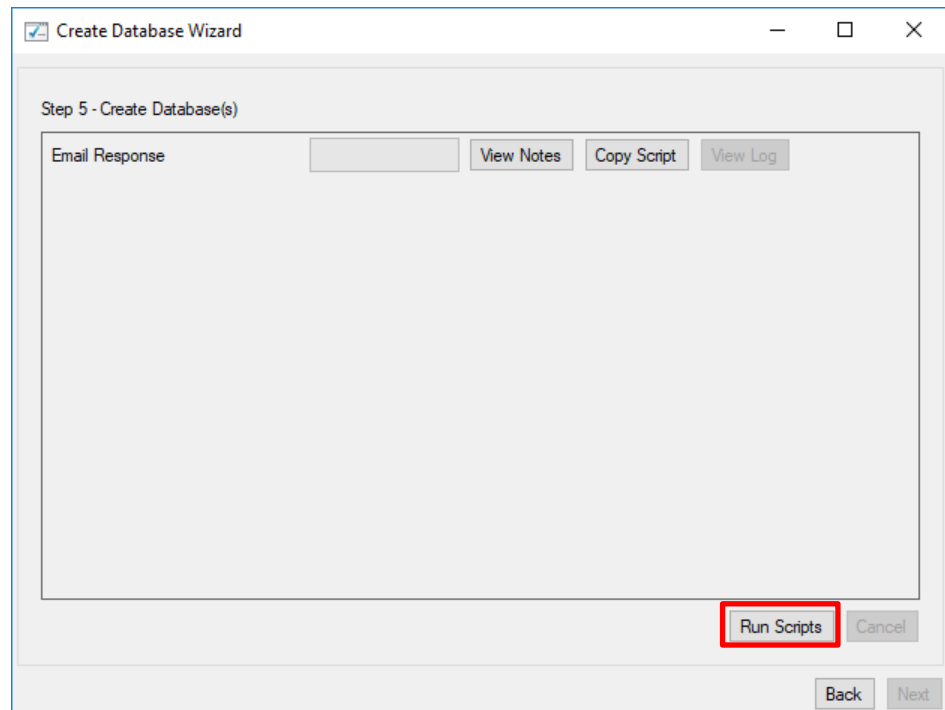
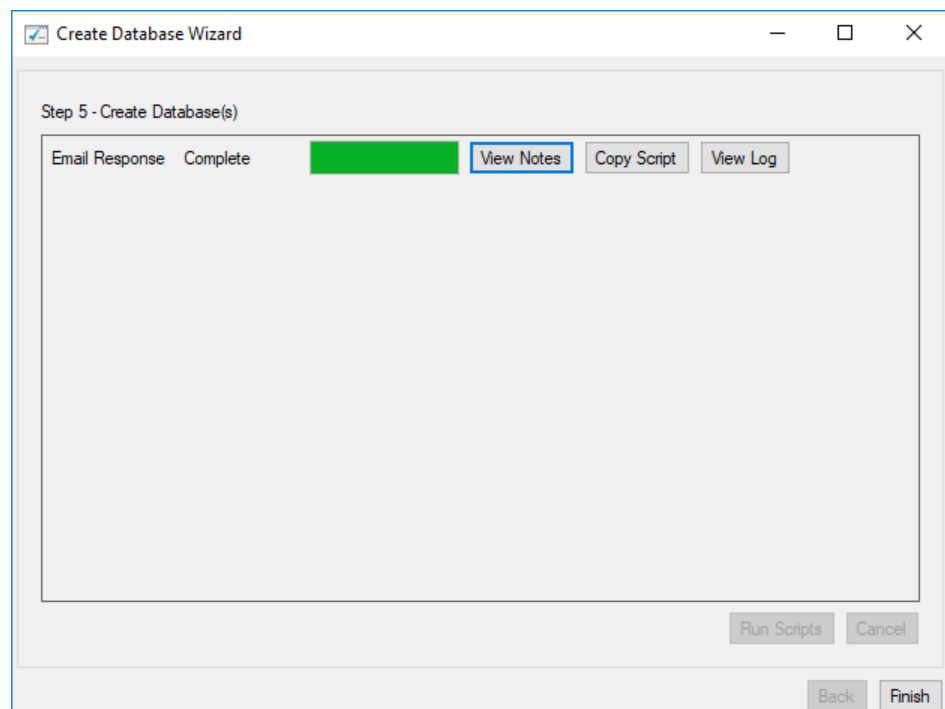


Note:

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.

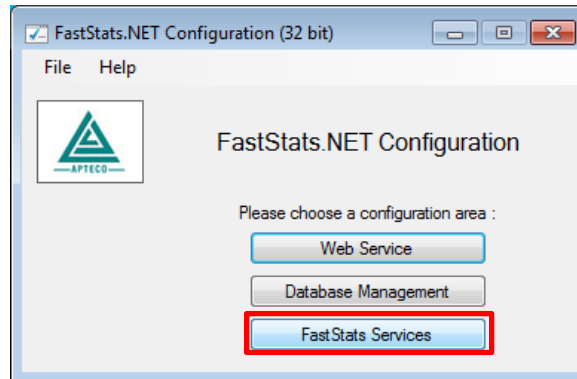


8. Click **Run Scripts**.9. Click **Finish**.

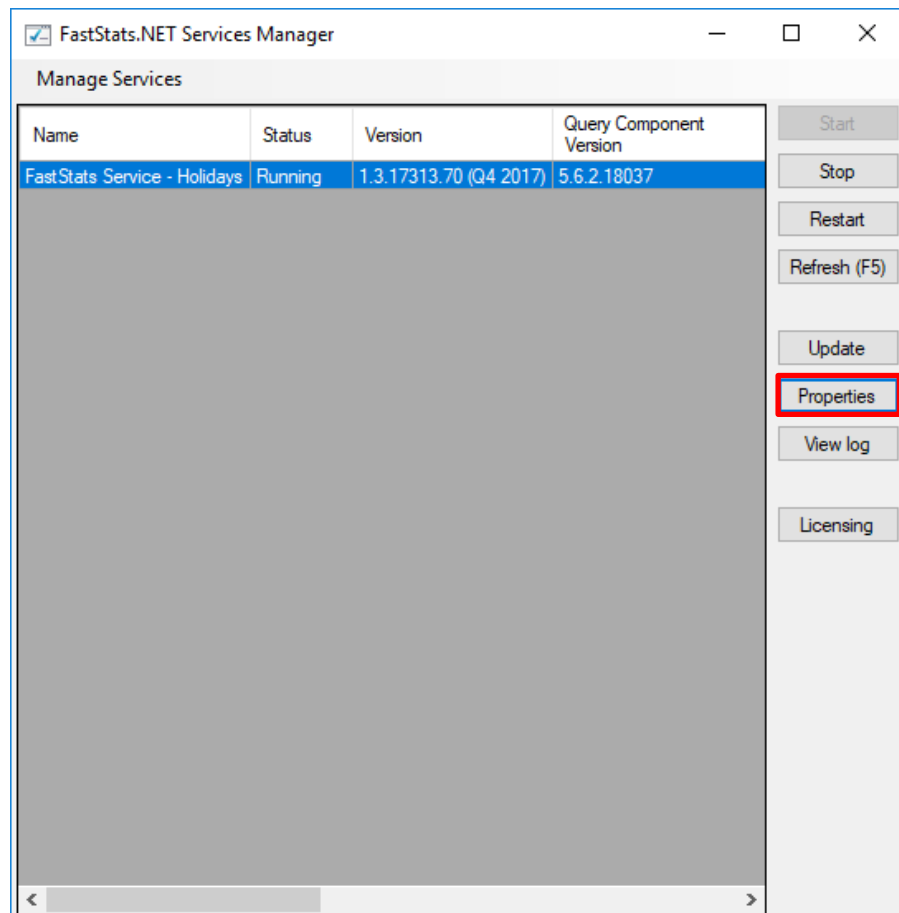
3.2 Linking the Response Database to the FastStats Service

You need link the response database to the FastStats service.

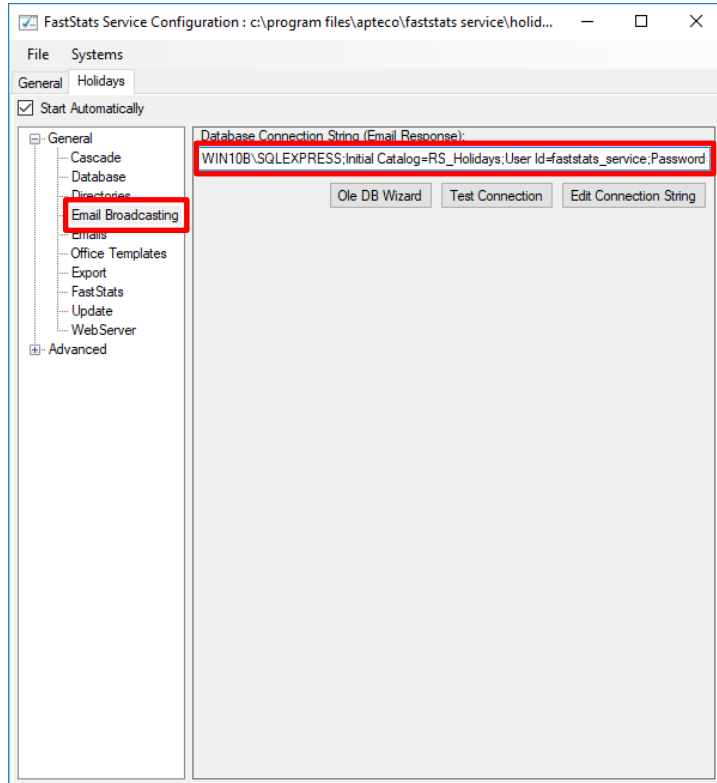
1. Open the **FastStats Configurator**
2. Select **FastStats Services**



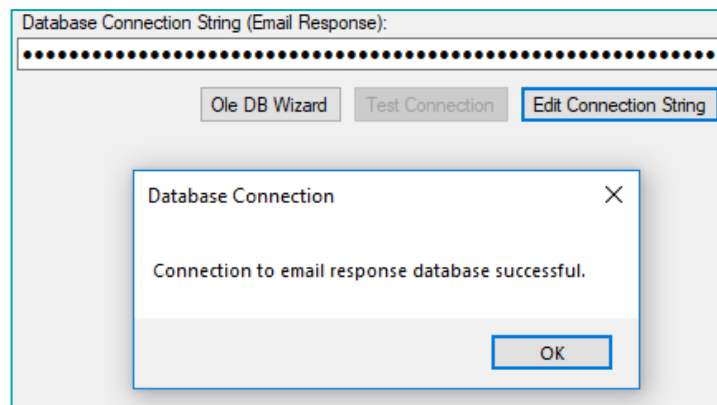
3. Select the **FastStats Service** for the system to link to the response database, click **Properties**



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 SilverPop server through port 443, see the example URL below; this may vary with your account:

transfer2.silverpop.com

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:

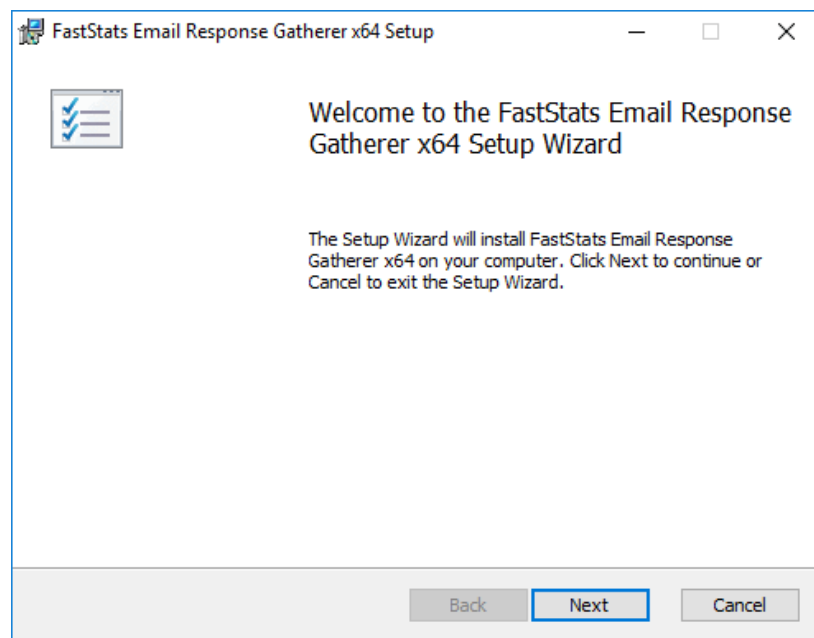
<https://www.apteco.com/portal/software-releases>

Note:

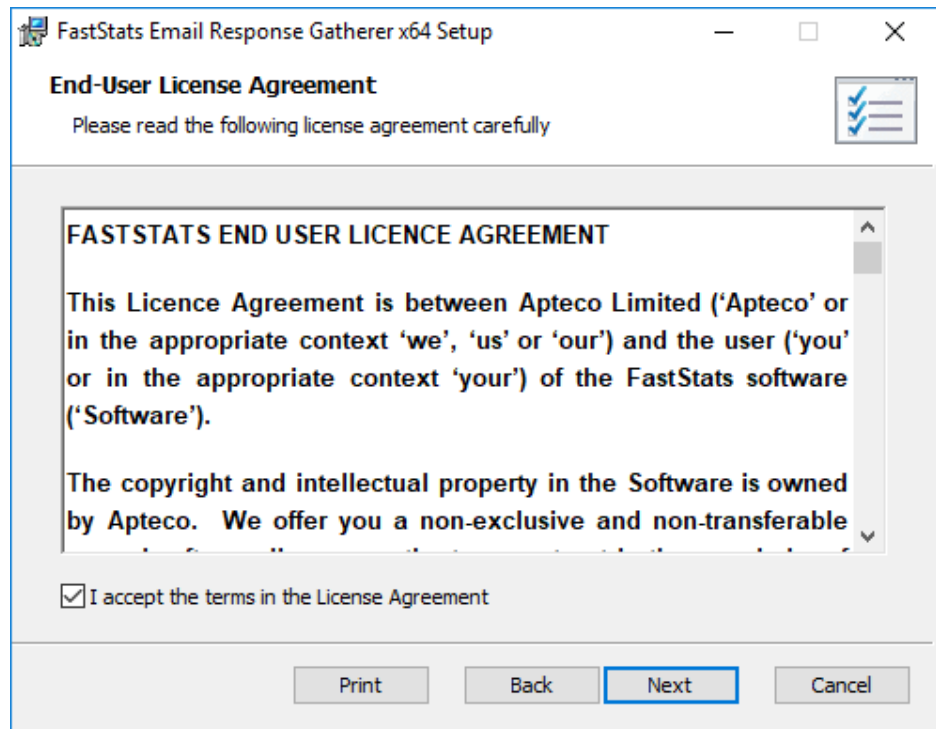
The FastStats Email Response Gatherer application can run on any PC in your system.

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

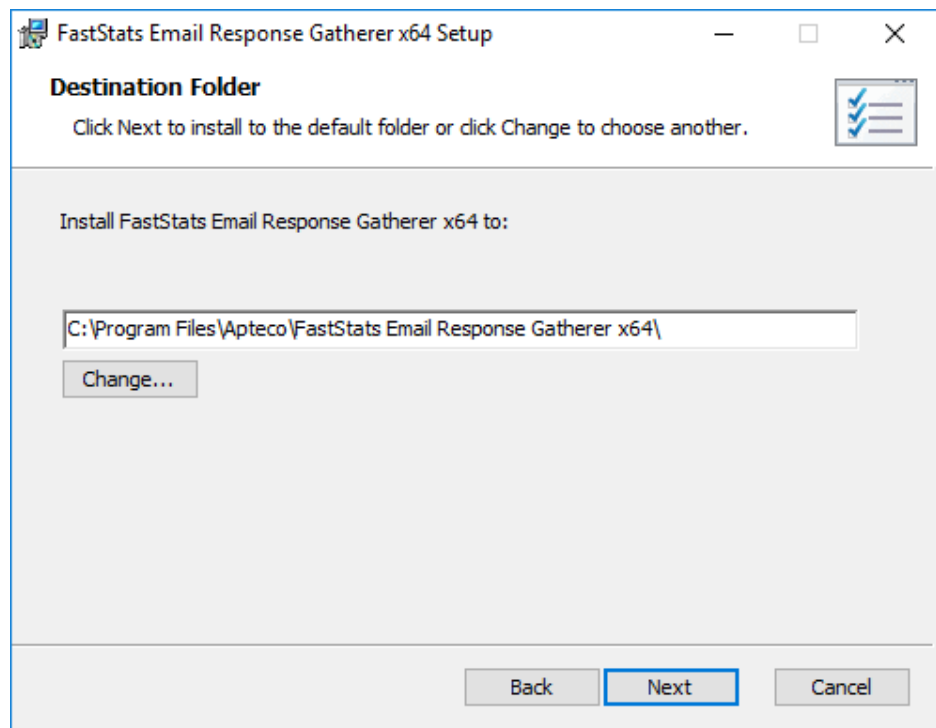
1. Click **Next**.



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



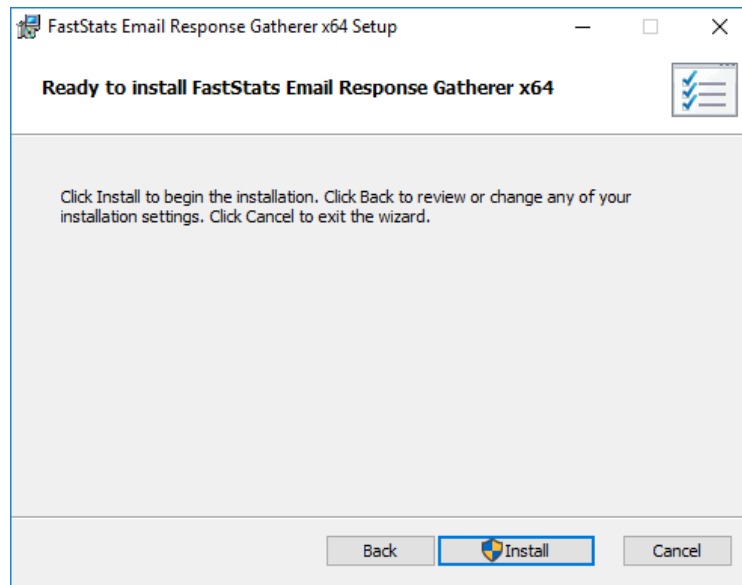
3. Click **Change** if you wish to install the Email Response Gatherer application in a different location then click **Next**



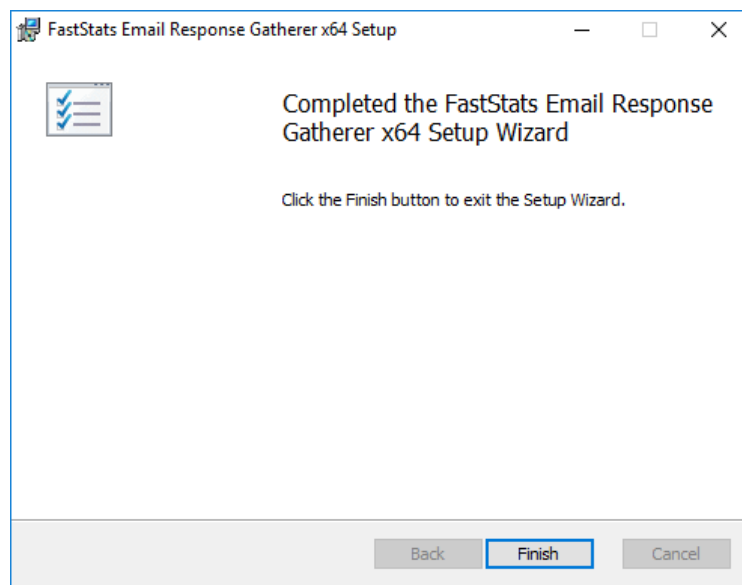
Note:

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

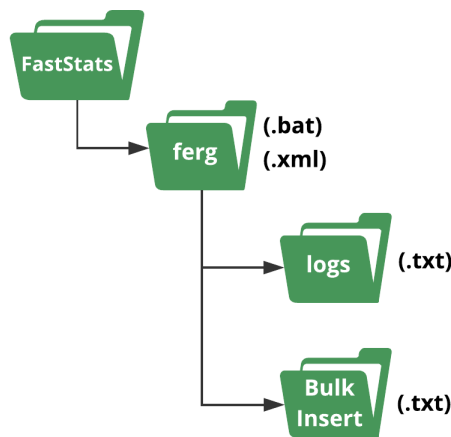
You will need to create folders to store the files to use with the Response Gatherer; these will include the following types of files.

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.

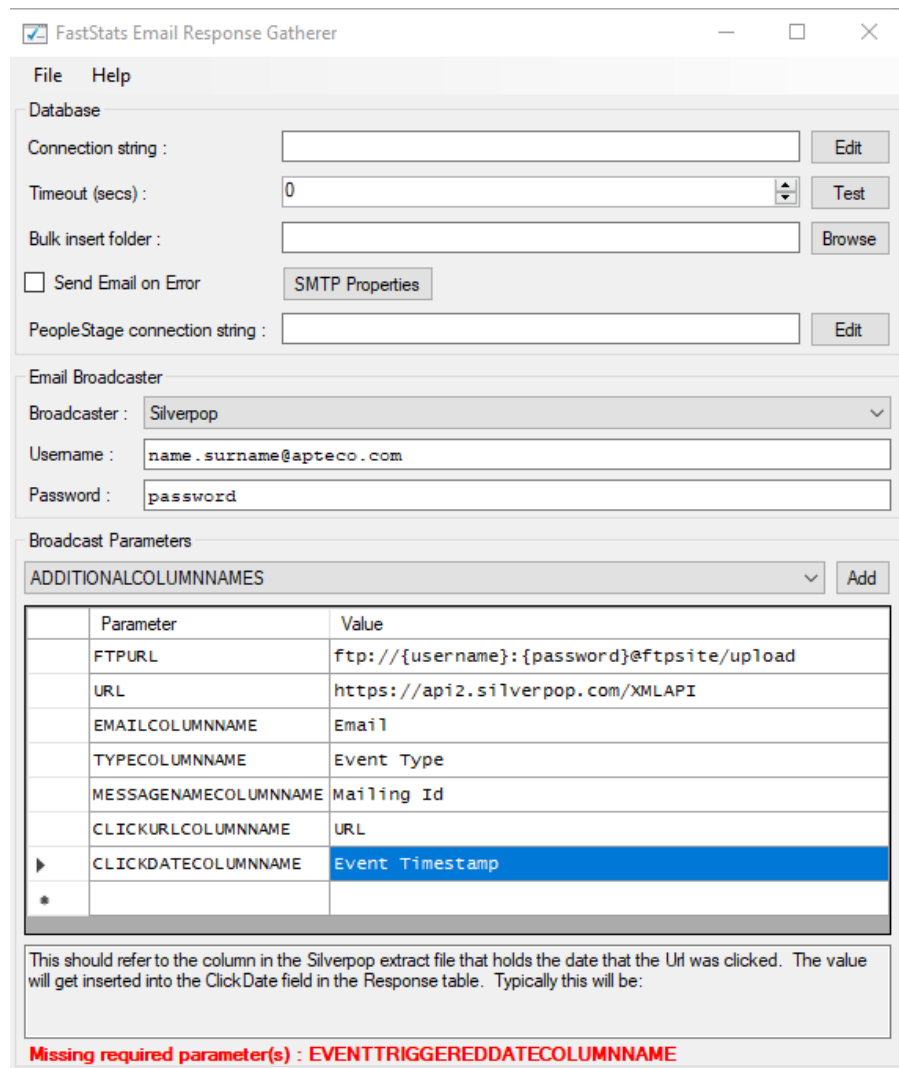
3.5 Creating the Configuration File

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 SilverPop from the Broadcaster drop-down list
3. Enter the **Username** and **Password** to use with the SilverPop 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



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 SilverPop

Email Response Config dialogue with ADDITIONAL FIELDS completed

FastStats Email Response Gatherer

File Help

Database

Connection string : Edit

Timeout (secs) : Test

Bulk insert folder : Browse

Send Email on Error SMTP Properties

PeopleStage connection string : Edit

Email Broadcaster

Broadcaster : Silverpop

Username : name.surname@apteco.com

Password : password

Broadcast Parameters

ADDITIONALCOLUMNNAME Add

Parameter	Value
FTPURL	ftp://{username}:{password}@ftpsite/upload
URL	https://api2.silverpop.com/XMLAPI
EMAILCOLUMNNAME	Email
TYPECOLUMNNAME	Event Type
MESSAGENAMECOLUMNNAME	Mailing Id
CLICKURLCOLUMNNAME	URL
CLICKDATECOLUMNNAME	Event Timestamp
▶ EVENTTRIGGEREDDATECOLUMNNAME	Event Timestamp
*	

This should refer to the column in the Silverpop extract file that holds the date that the event was produced. The value will get inserted into the Event TriggeredDate field in the Reponse table. Typically this will be:

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.

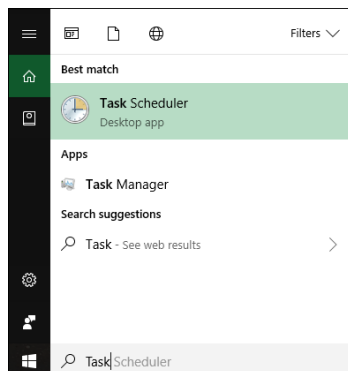
Using Task Scheduler

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

1. Open Windows **Task Scheduler**

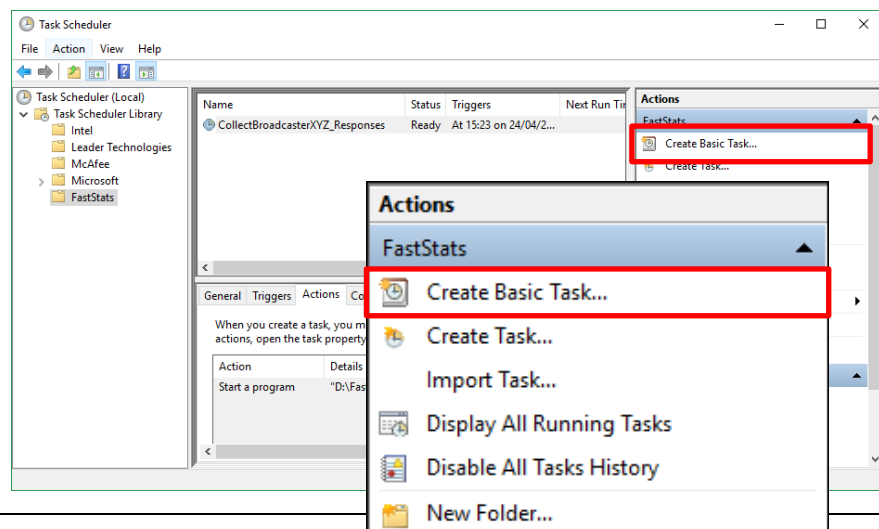
Tip

Search for **Task** in the Start Menu



The Windows Task Scheduler opens

2. Select **Create Basic Task**

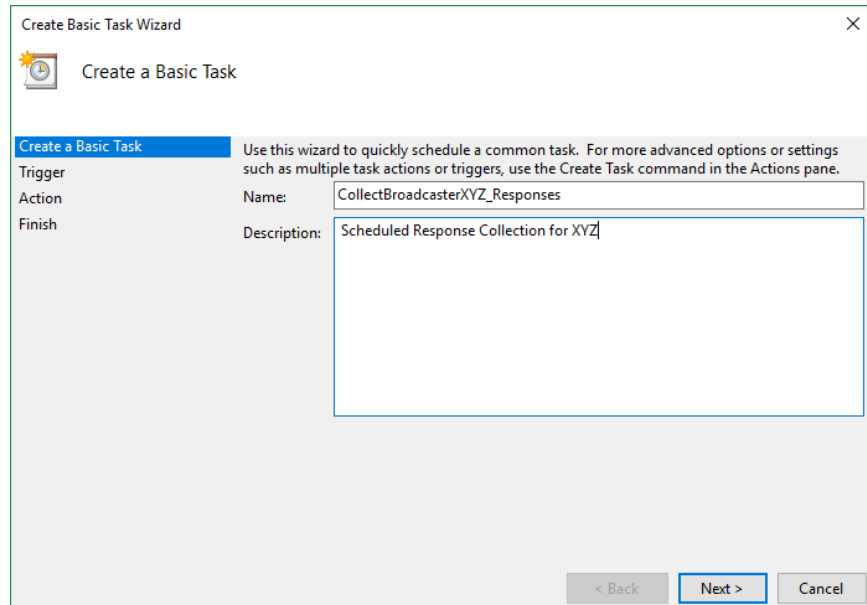


Tip:

You can create folders to organise your tasks

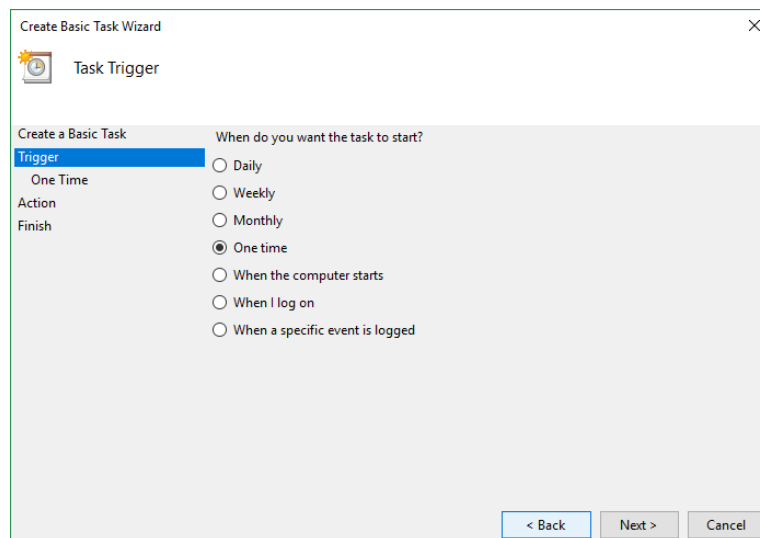
3. **Create a Basic Task** step

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

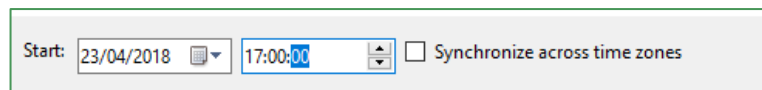


4. **Task Trigger** step

a. Select the **Trigger** interval

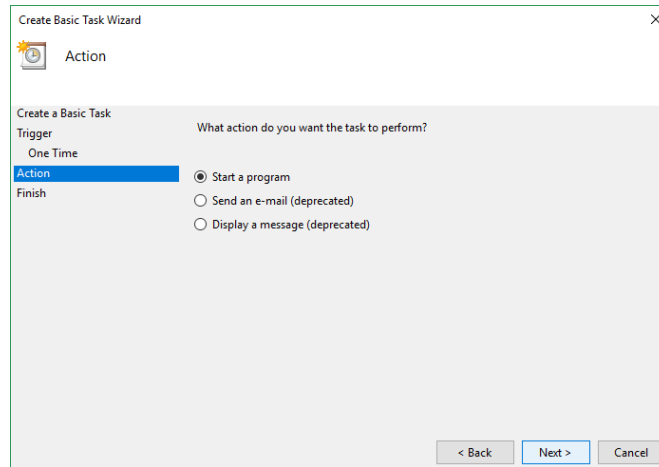


b. Enter the Start Date and Time or relevant sub-step details



5. Action step

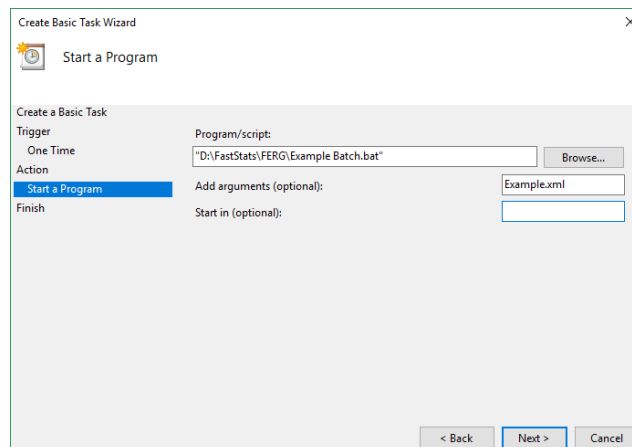
- a. Select **Start a program** and click **Next**



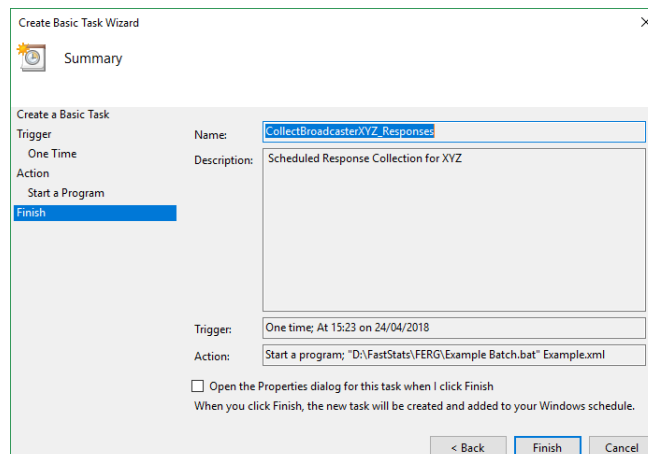
6. Start a Program Step

- 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:

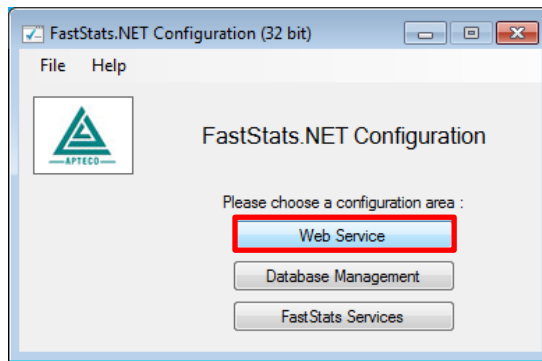
You must log in as an administrator to perform the following task.

The Email Broadcasting Wizard is required for FastStats use only.

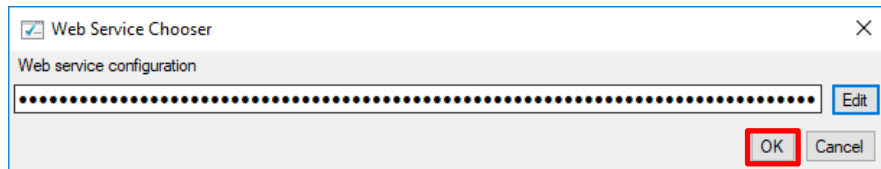
4.1 Enable Email Broadcasting

You must enable the Email Broadcasting wizard plugin.

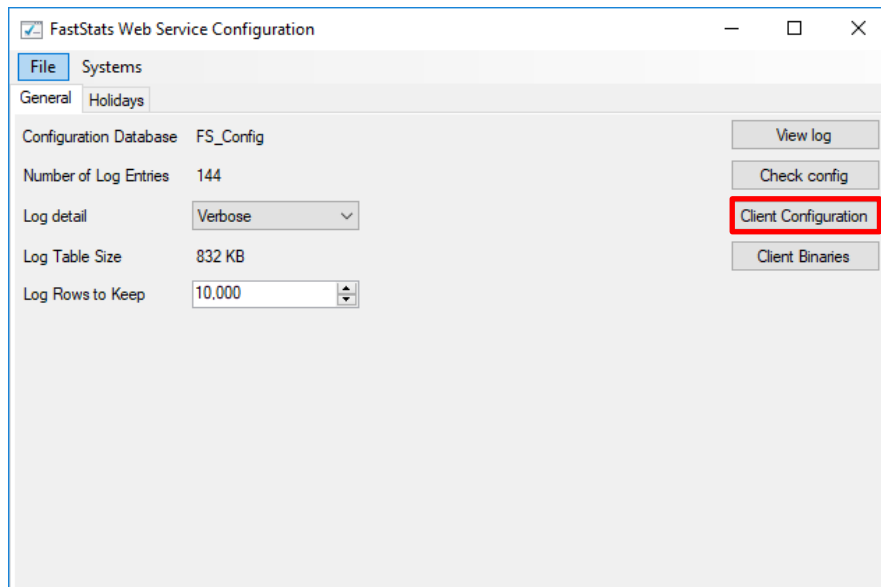
1. Open the **FastStats Configurator**
2. Select **Web Service**



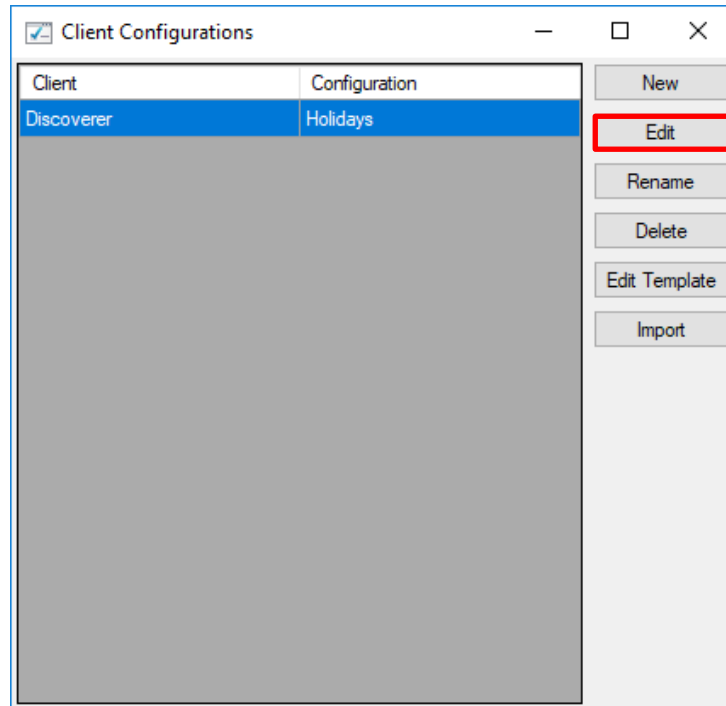
3. Click **OK** on the Web Service Chooser dialogue box



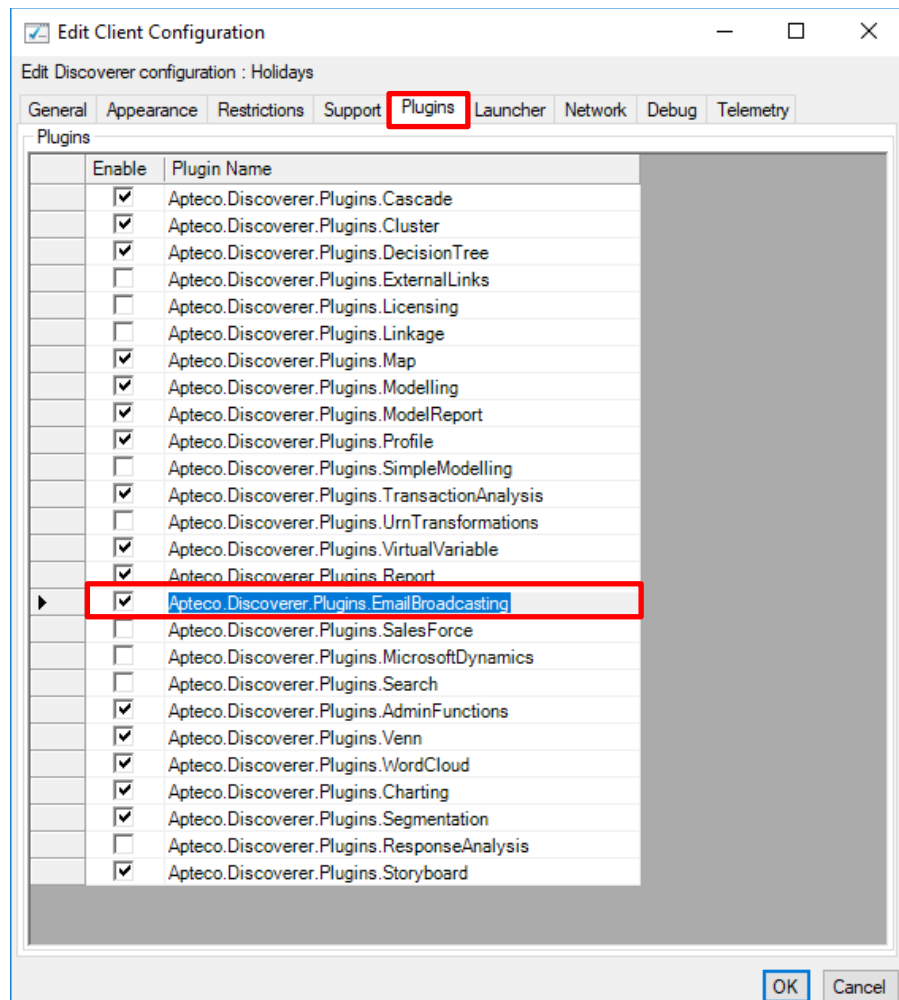
4. Click **Client Configuration**



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

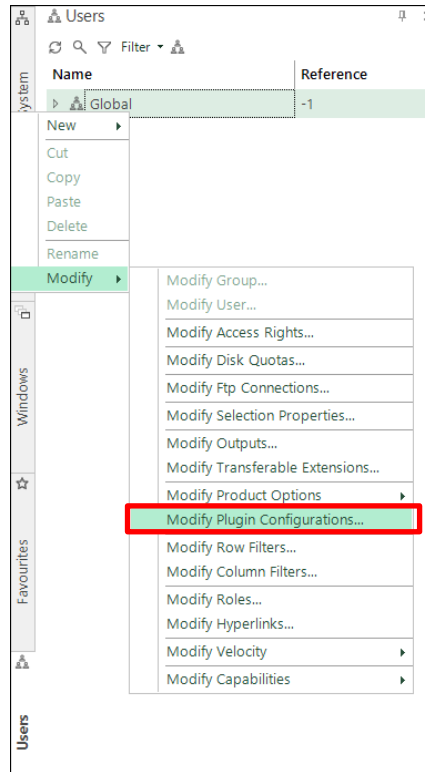


6. On the Plugins tab ensure the **Apteco.Discoverer.Plugins.EmailBroadcasting** check box is selected then click **OK**

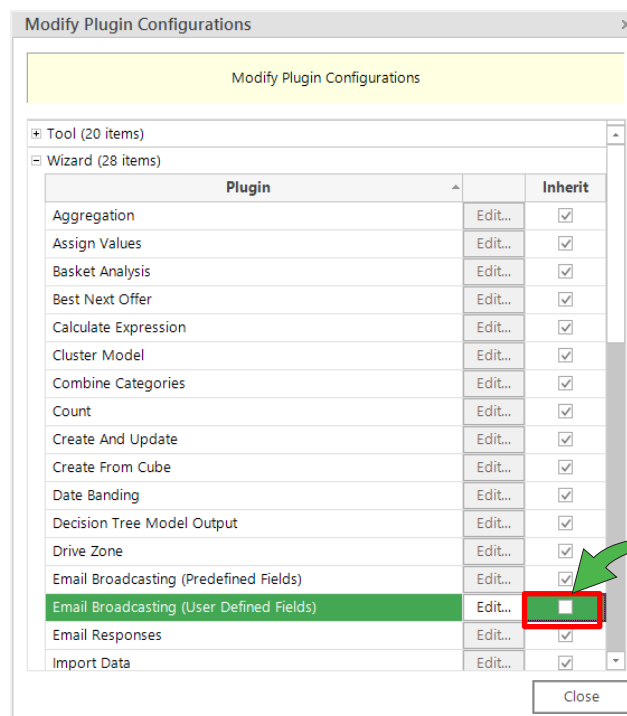


4.2 Configuration in FastStats

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

The 'Email Broadcasting' dialog box contains the following fields and controls:

- Name: Visible In Toolbox
- Tooltip Text:
- Image Path:
- Group: Order Within Group: Group Order:
- Templates:

Name

- Buttons: (highlighted), ,

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

The 'Edit Template' dialog box contains the following fields and controls:

- Name: (highlighted)
- Resolve Table: (highlighted)
- Broadcaster:
- Known Parameters:
 - URL:
 - Dated List Format:
 - Visibility:
- Additional Parameters:

Key	Value
*	
- Parameters:
- Buttons: ,

Note:

Scroll to enter the Known Parameters information, some fields will be entered automatically, * indicates a required parameter.

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

Table 3 – Edit Upload Template Known Parameters Settings

Parameter	Reqd.	Settings to use
URL	Y	https://api[pod].silverpop.com/XMLAPI
Dated List Format	Y	yyyyMMdd-HHmss
Visibility	Y	1
FTP Username *	Y	username* (blank by default)
FTP Password *	Y	password* (blank by default)
FTP URL	Y	transfer[pod].silverpop.com*
Upload Empty Lists		Selected (default)
Private Key Path		
Upload Only Contact List Folder		
Upload And Broadcast Contact List Folder		
Upload Only List Folder		
Upload And Broadcast List Folder		
Client ID	Y	A unique alphanumeric string*
Client Secret	Y	A unique alphanumeric string*
Refresh Token	Y	A unique alphanumeric string* (You will receive this from Watson Automation by email)
List Id Column Name		
Master Table	Y	The database to use within SilverPop
Encoding	Y	Default

Note:

*These settings will be specific to your SilverPop account. [pod] refers to a unique numeric ID for your account

Note:

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

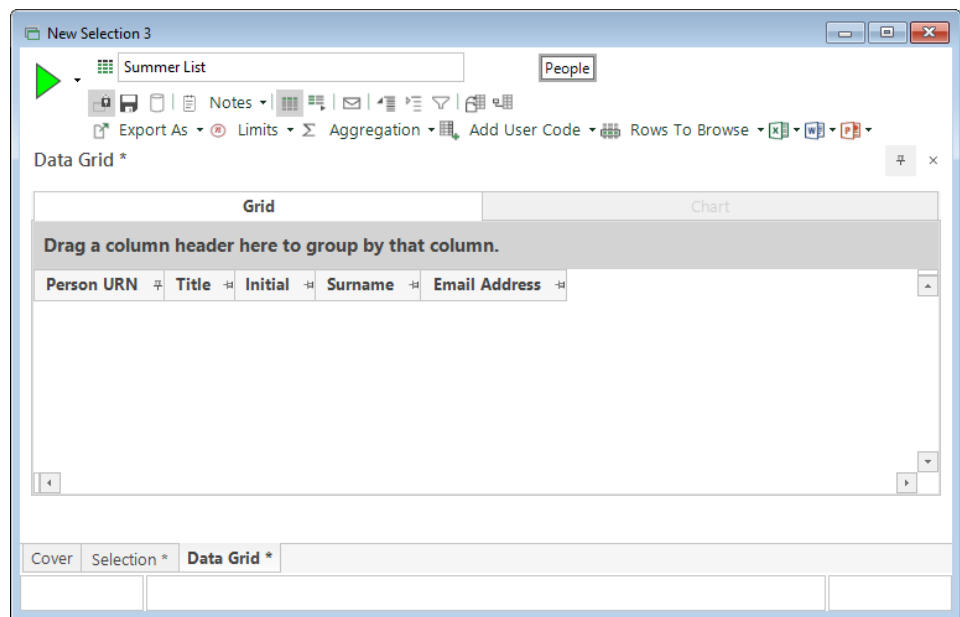
4.3 Checking your configuration

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.

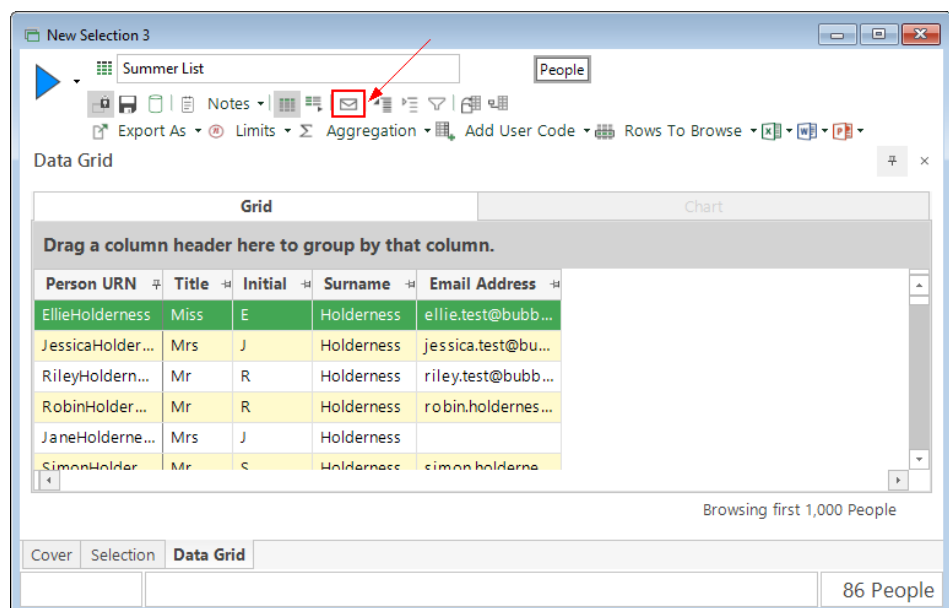
Note:

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

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



2. Click the **Email Broadcasting** icon

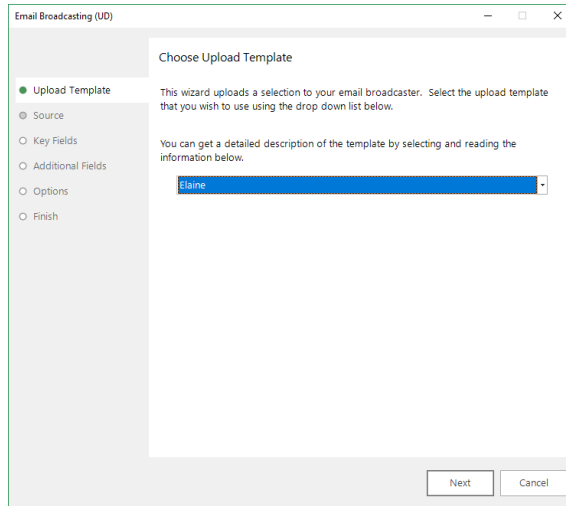


The **Email Broadcasting Wizard** opens

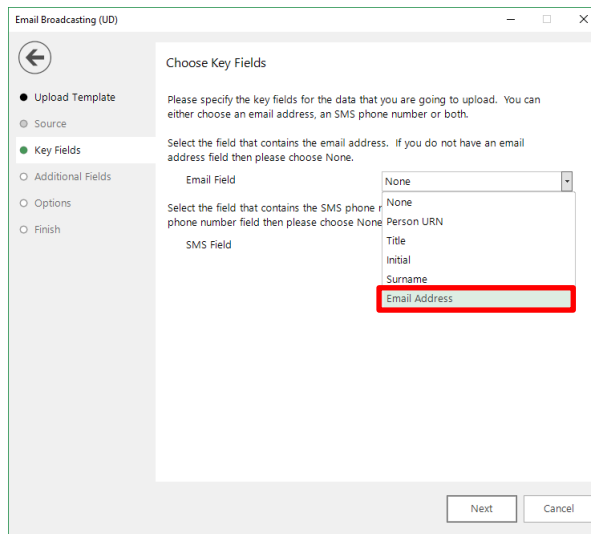
3. Choose the **SilverPop** template from the drop-down list and click **Next**

Note:

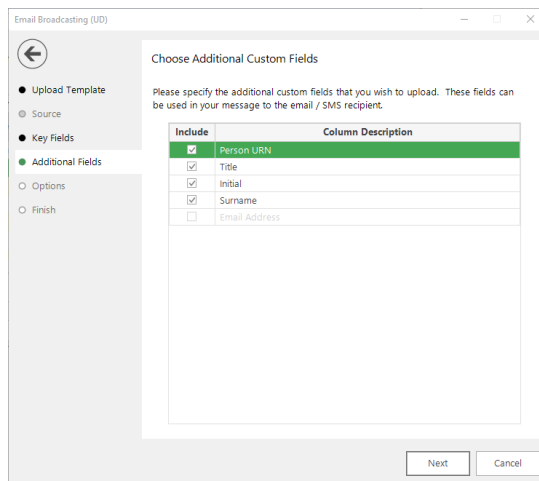
The wizard will omit this step if you have only one Upload Template



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



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



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

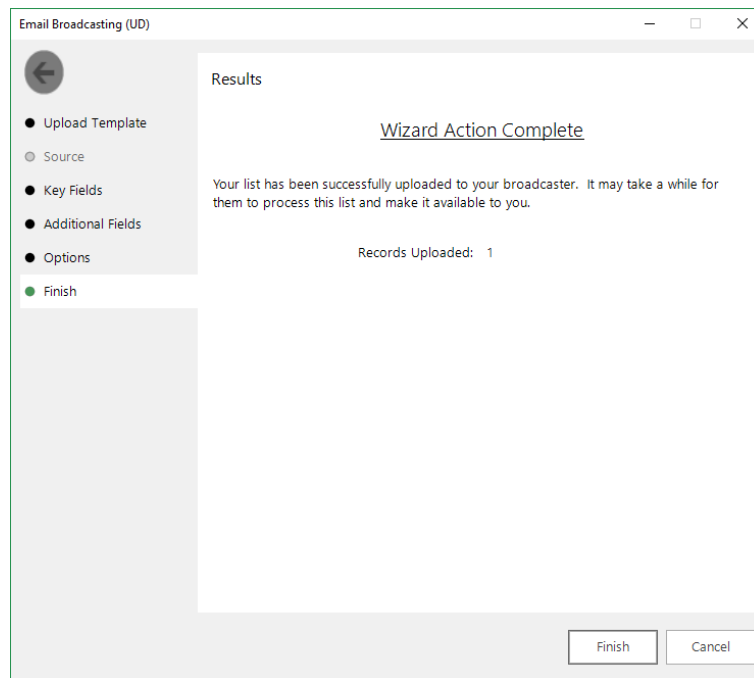
Table 4 – EmailResponseGatherer.exe.config Settings

Option	Settings to use
Username	The username for your SilverPop account
Password	The password for your SilverPop 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

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.



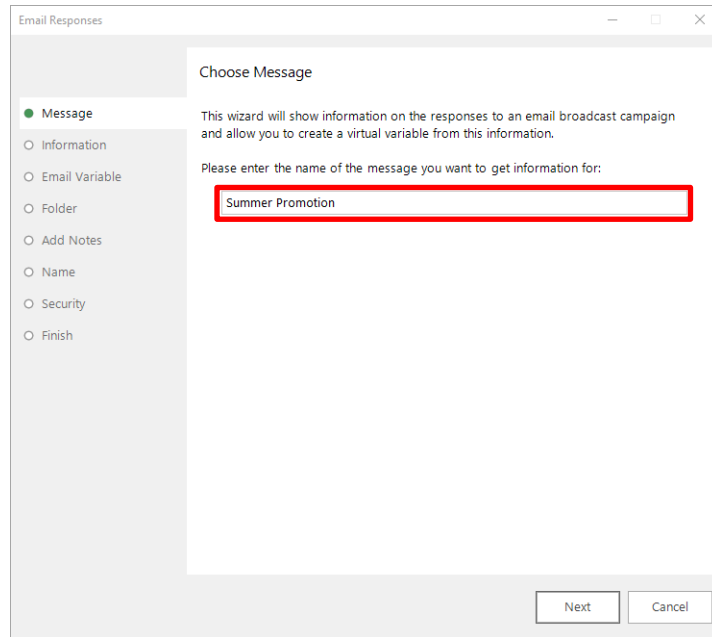
Note:

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

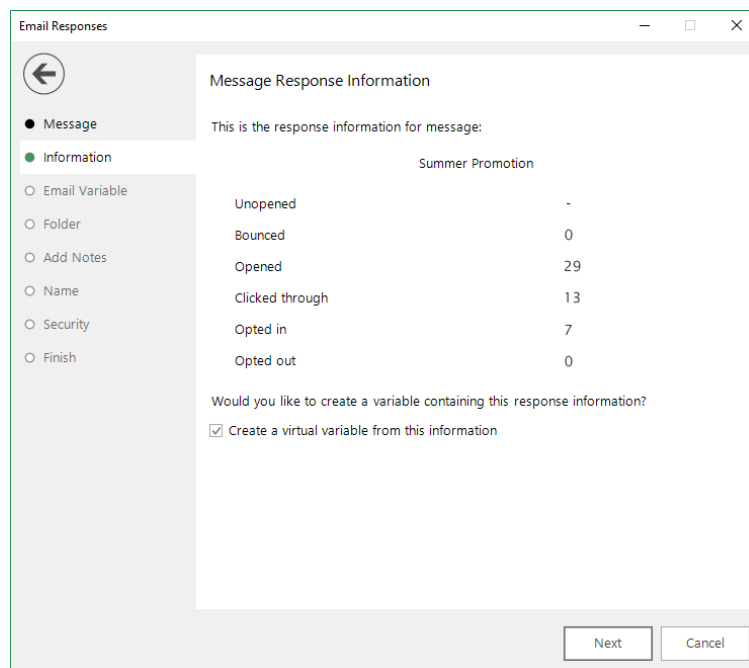
4.4 Email Responses Wizard

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**



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

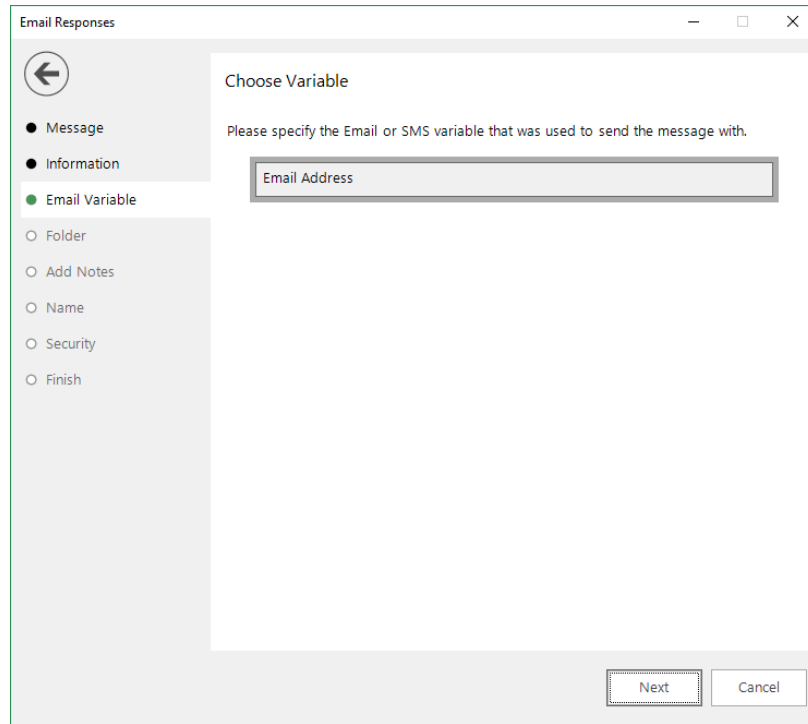


4. Drag the Email variable that you used in the Email Broadcasting wizard onto the drop box and click **Next**

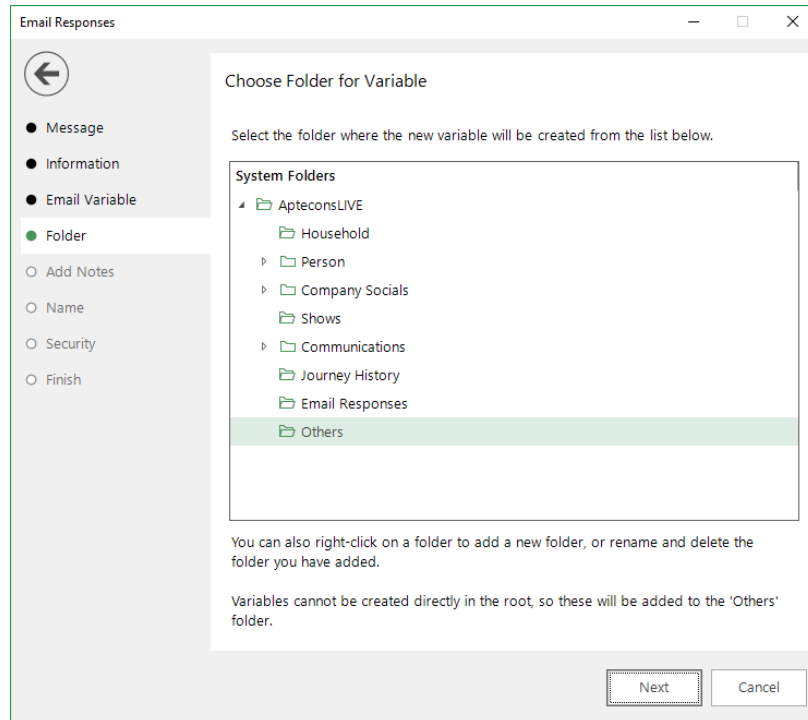
Choose Variable

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

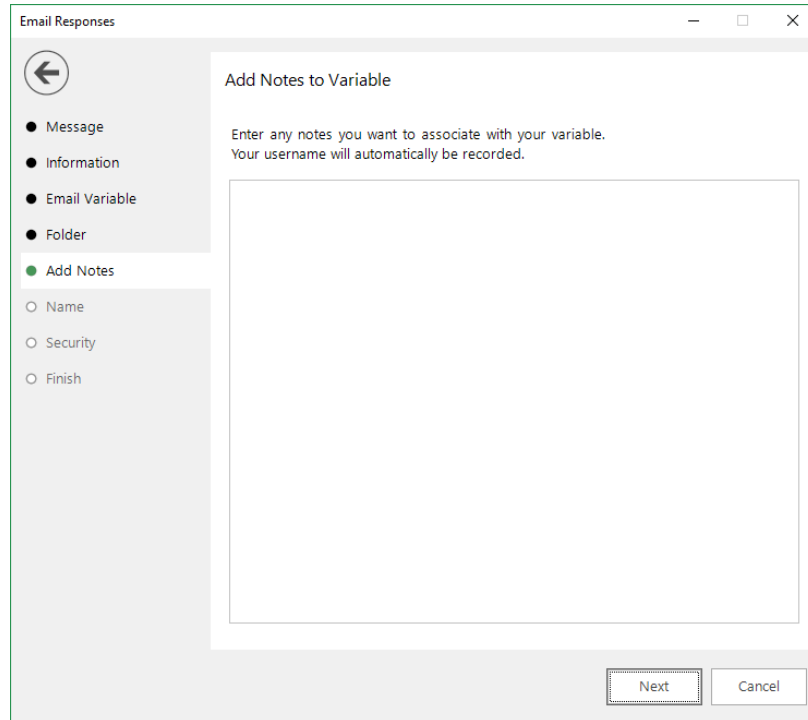
Drop your variable here



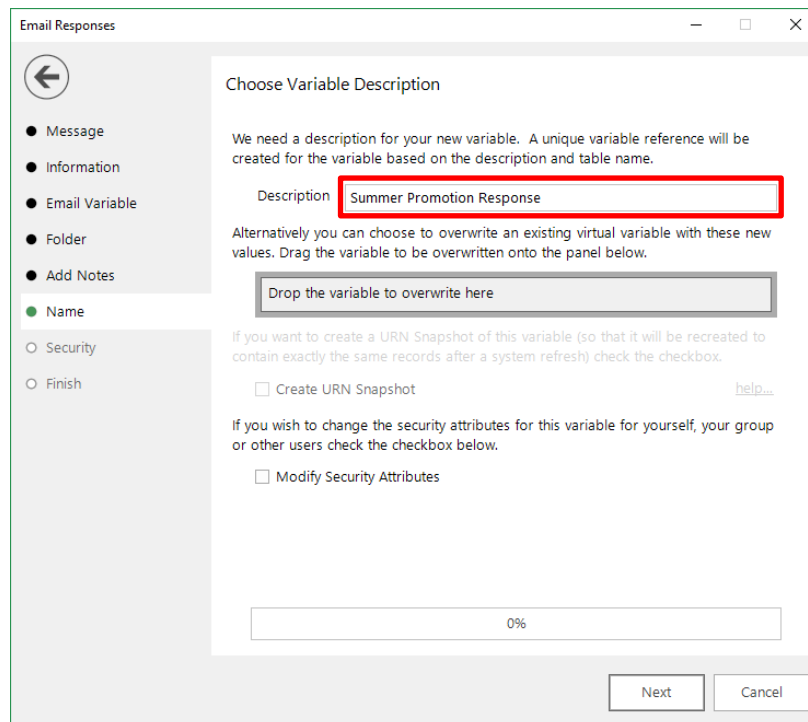
5. Locate the folder where you wish to store the virtual variable and click **Next**



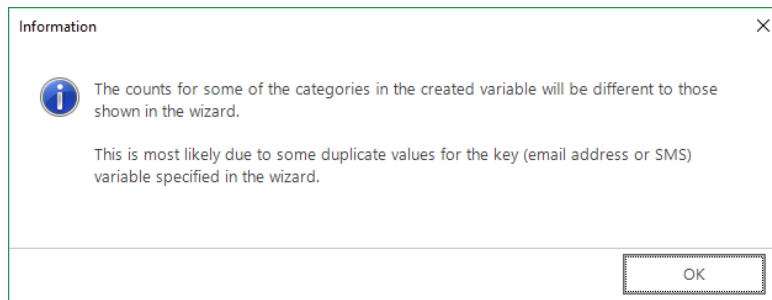
6. Enter any notes that will be stored along with the virtual variable and click **Next**



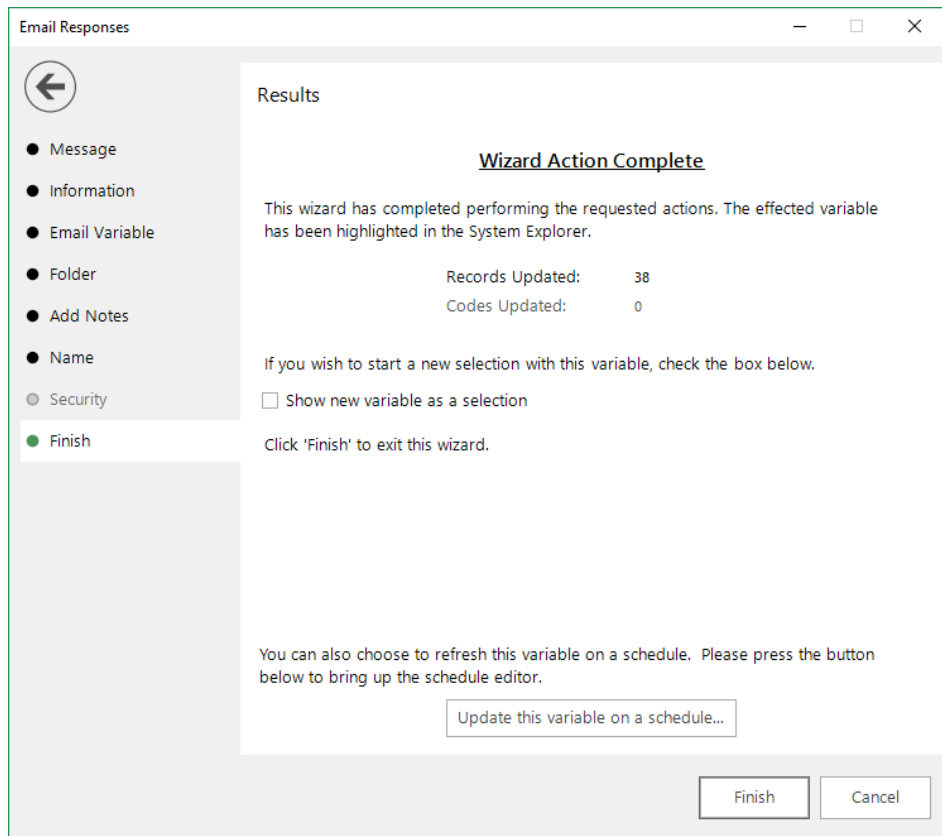
7. Enter a Description for the virtual variable or drag an existing virtual variable onto the drop box if you wish to overwrite it. Modify the Security Attributes if applicable and then click **Next**



8. Click **OK**



9. Click **Finish**

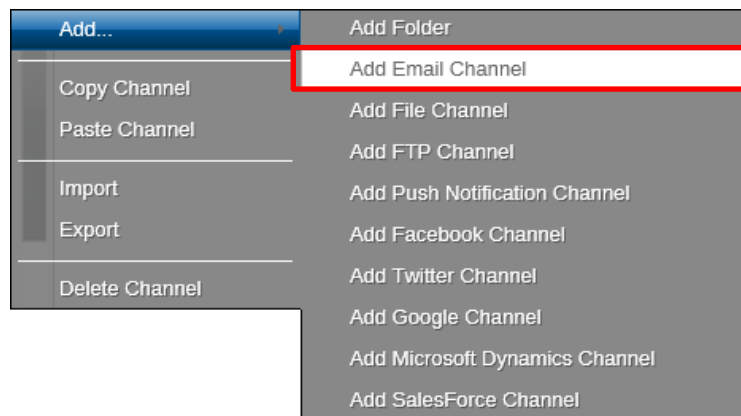


5 PeopleStage Broadcasting & Responses

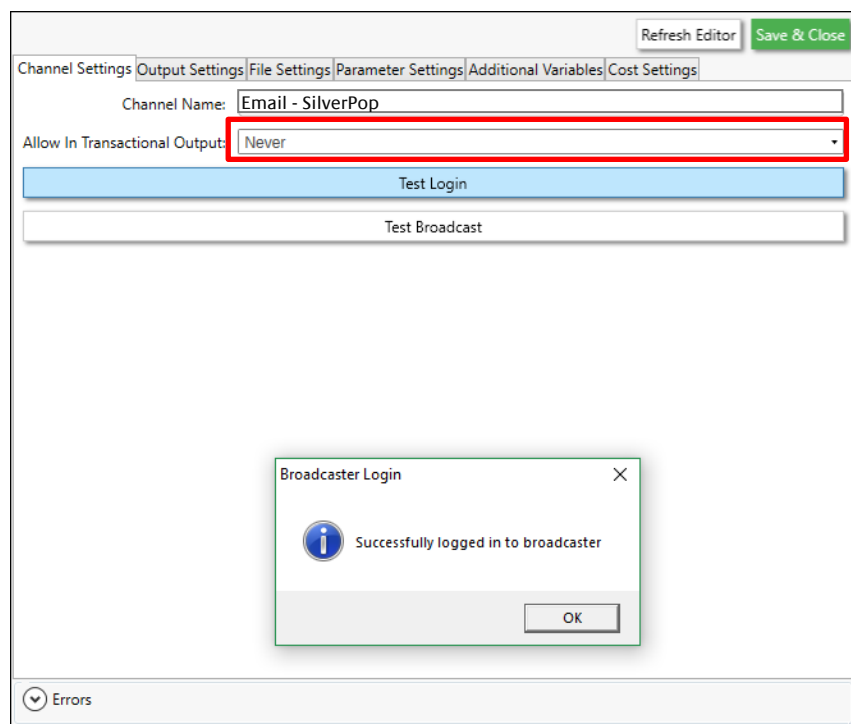
5.1 Defining the Broadcast Channel in PeopleStage

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

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 SilverPop

Table 5 –PeopleStage Output Settings

Field	Settings
Broadcaster	Select SilverPop 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” Note: This must correspond to the e-mail field within SilverPop
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. Note: 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 SilverPop.
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

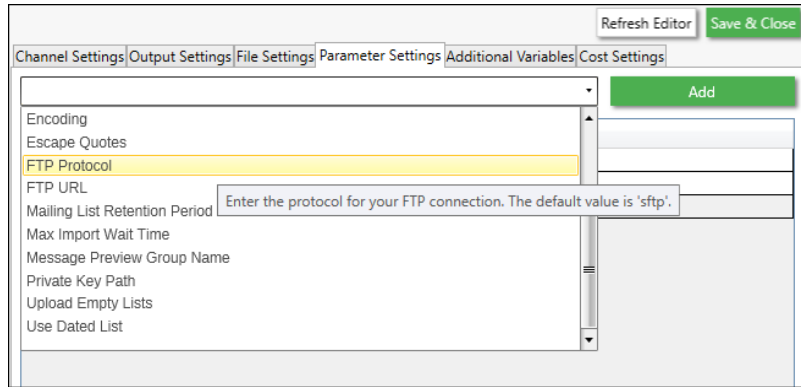
Errors

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

5. 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 SilverPop or contact your Partner or Apteco

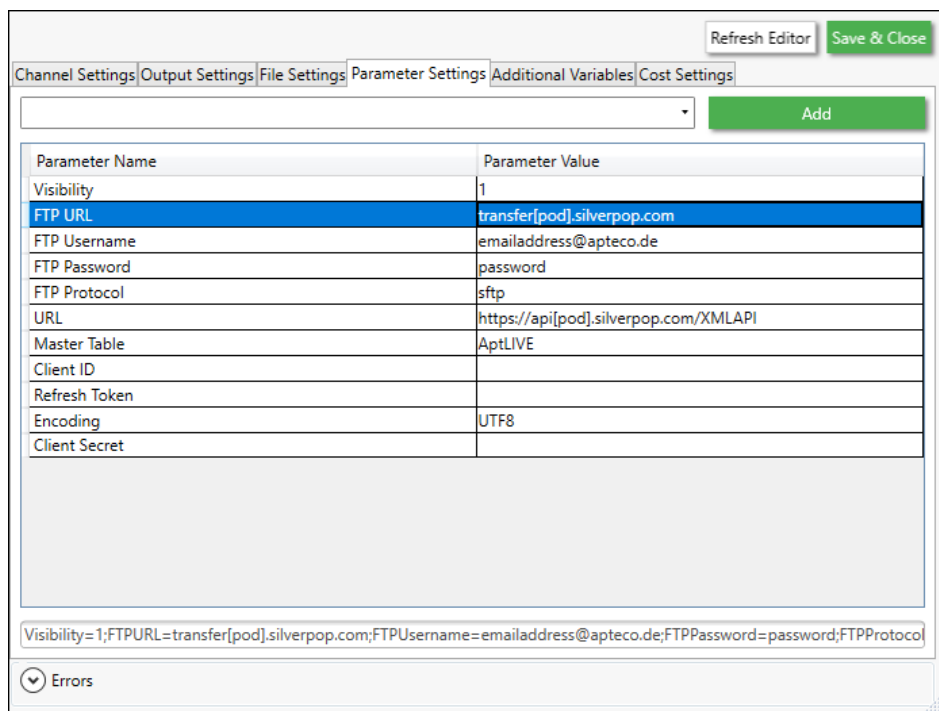


Table 6 –PeopleStage Parameter Settings

Field	Settings
	*These will be specific to your account
Visibility	1
FTP URL	Transfer[pod].silverpop.com (pod is a unique number specific to your account)
FTP Username	Enter your FTP username *
FTP Password	Enter your FTP password *
FTP Protocol	Either sftp, ftp or ftps*
Master Table	The name of the SilverPop database to use
Client ID	A unique alphanumeric string*
Refresh Token	A unique alphanumeric string*
Encoding	UTF8
Client Secret	A unique alphanumeric string*

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

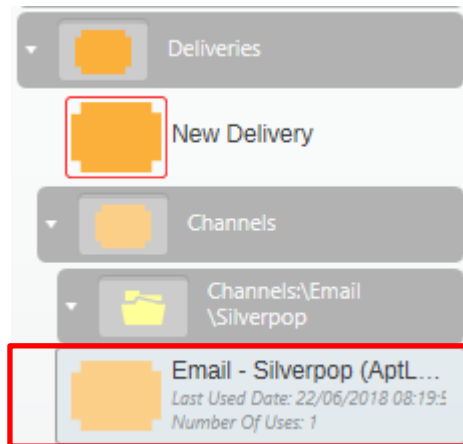
Additional Variables Location: End

Errors

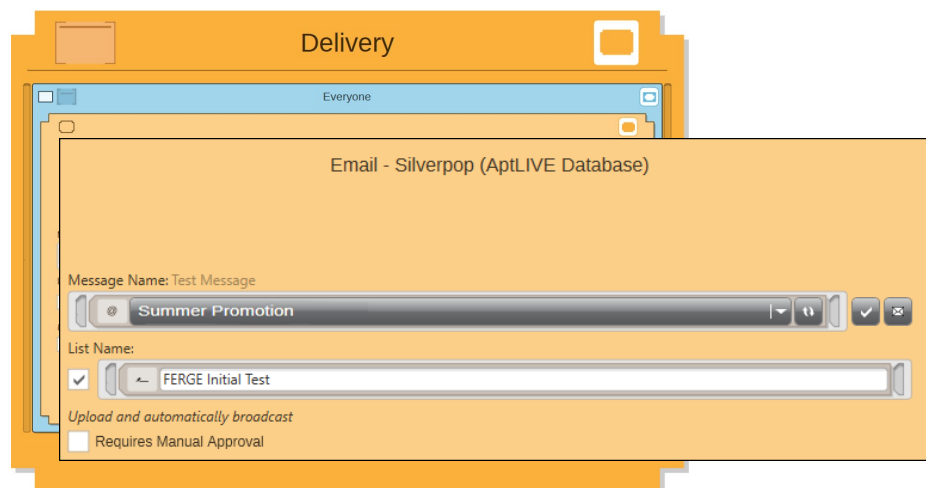
5.2 Broadcasting in PeopleStage

You can now test your channel at any Delivery Stage

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



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



3. Enter your SilverPop **List Name**

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

Appendix A: SilverPop Configuration

SilverPop from IBM Watson, SilverPop 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 SilverPop 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 with a **Mailing Name** within SilverPop.

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

Note:

IBM Watson uses Shared or Private folders, you should create your databases and content in the **Shared** area.

A. Organization Settings and Required Information

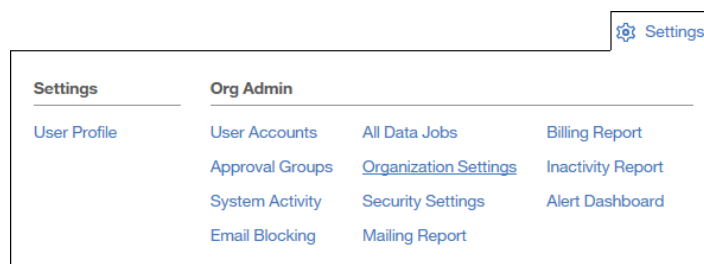
You need the following three items to use in FastStats with Watson:

Client ID, Client Secret and a Response key.

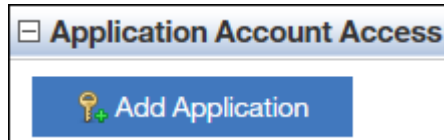
The first two are provided when creating an Application in Watson

Adding an Application

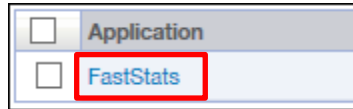
2. From the **Settings** menu select **Organization Settings**



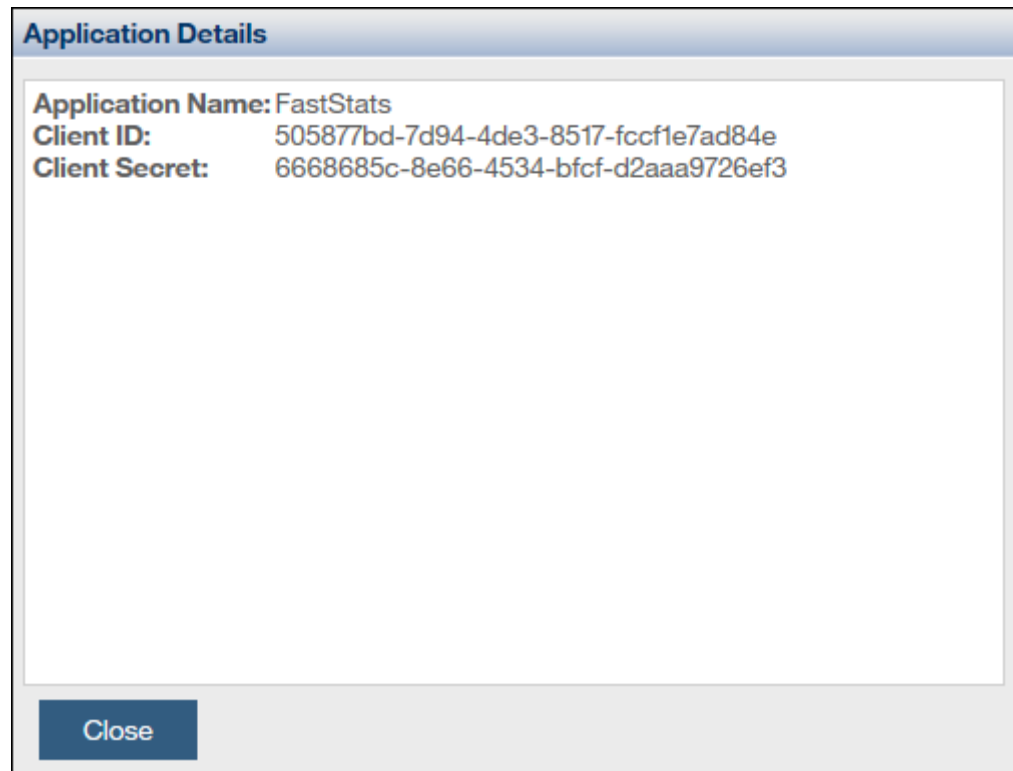
3. From the **Application Account Access** node click **Add Application**



4. Click in the application name to see the Application Details dialog



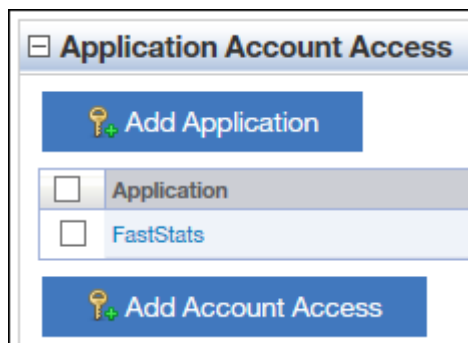
Application Details dialogue with the Client ID and Client Secret



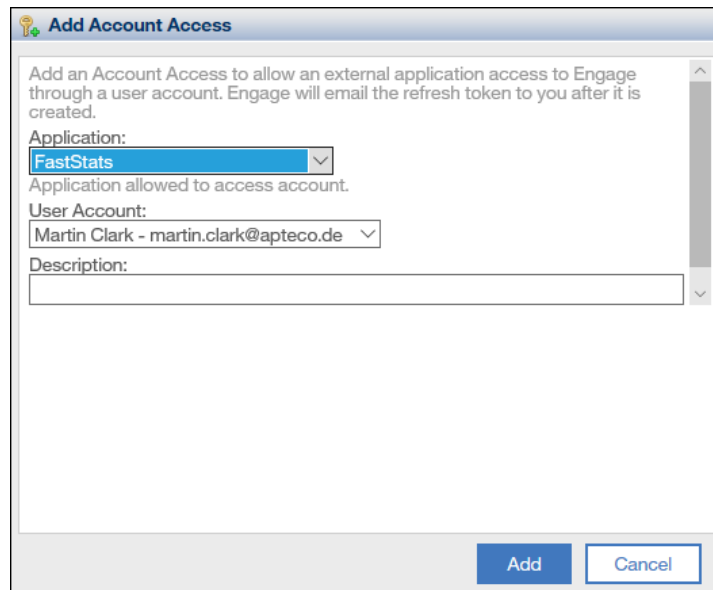
The Response key is created when you add account access.

Add Account Access

5. Click **Add Account Access** and select the new application from the list



6. Select the **Application** from the drop-down and the **User Account** from the **Add Account Access** form

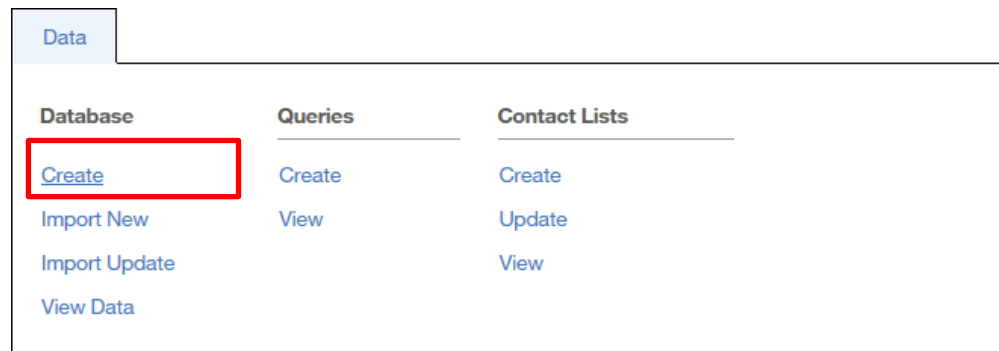


Getting a Response Key

An email with the Response Key will be sent to the email address associated with the selected user.

B. Creating a Mailing Database

You need a Database for each mailing list, from the **Data** menu select **Create** from the database section



The database creation wizard launches.

From **Step 1** - choose the type of database and complete the form:

- You will most likely choose **Double Opt-In** or **Single Opt-In** depending on your preferences requirements.
- Enter a **Database or List Name**
- Click **Select** to choose the **Shared** area
- Either Flexible or Restricted will work, Restricted requires a Unique Identifier at setup.

Click **Next**

Create database / list

Steps: **1** Name 2 Add Fields

What type of database or list would you like to create?

Double Opt-In Database

Single Opt-In Database

Test List

Seed List

Suppression List

Database or List Name

AptecoDB

Where would you like your database or list to be saved?

Shared Select

Create a Flexible or Restricted database

Flexible Database
Required for SMS, Mobile App Messages, CRM and strongly recommended for UBX customers. Select your database field(s) that you want to sync by when adding or updating contacts.

Restricted Database
Requires that you select a Unique Identifier(s) now. The field that you select as your Unique Identifier is required when adding or updating contacts. Typically the Unique Identifier is Email, but can be other fields.
[Click here](#) to learn more about settings and database creation.

Next

From **Step 2**, add the required fields for FastStats

Create database / list

Steps: 1 Name **2** Add Fields

Field Name

Field Type

Text Add Field

Database / List Fields

UID	Field Name	Field Type	Required	Default Value
Edit	Email	System	No	
	Opt In Details	System	No	
	Email Type	System	No	
	Opted Out Date	System	No	
	CRM Lead Source	System	No	
	Last Modified Date	System	No	
	Opt Out Details	System	No	
	Opt In Date	System	No	
	CREATED_FROM	System	No	
Edit	URN	Text	Yes	

Create Cancel Edit Unique Identifiers

You will need the following fields as a minimum:

URN - needed to map to the URN in a FastStats system

Email – (This is added by default in Watson and is set as the Unique Identifier)

Click **Edit Unique Identifiers** and set the **URN** field as the **UID**, click **Save**

UID	Field Name	Field Type
	CREATED_FROM	System
	Opt In Date	System
	Opt Out Details	System
	Last Modified Date	System
	CRM Lead Source	System
	Opted Out Date	System
	Email Type	System
	Opt In Details	System
<input type="checkbox"/>	Email	System
<input checked="" type="checkbox"/>	URN	Text
<input type="checkbox"/>	Forename	Text

Any other fields such as the following are dependent on your campaign requirements, for example:

- Forename
- Surname
- Subject – used to personalize the message
- Run Number
- Communication Key - May be required for PeopleStage

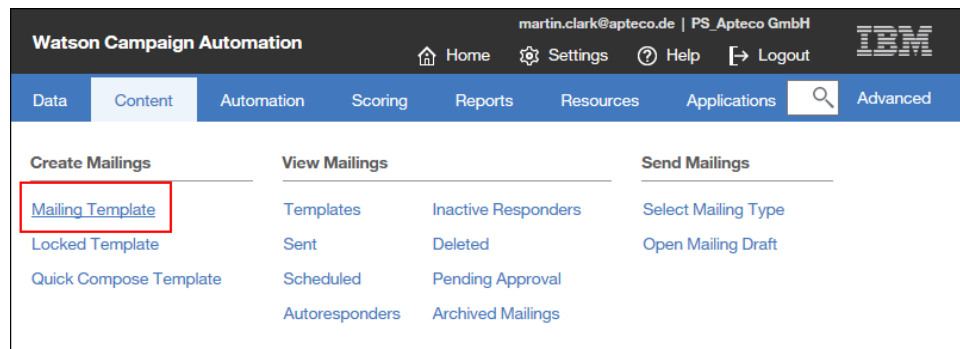
Click **Create** to complete the Database/list creation process

Note:

The above database name is used as the **Master Table** entry during the creation of the Upload Template (see 4.2 Configuration in FastStats). **If the Master Table is not specified** Watson will create a database automatically. In this way you can still use Watson without creating a database.

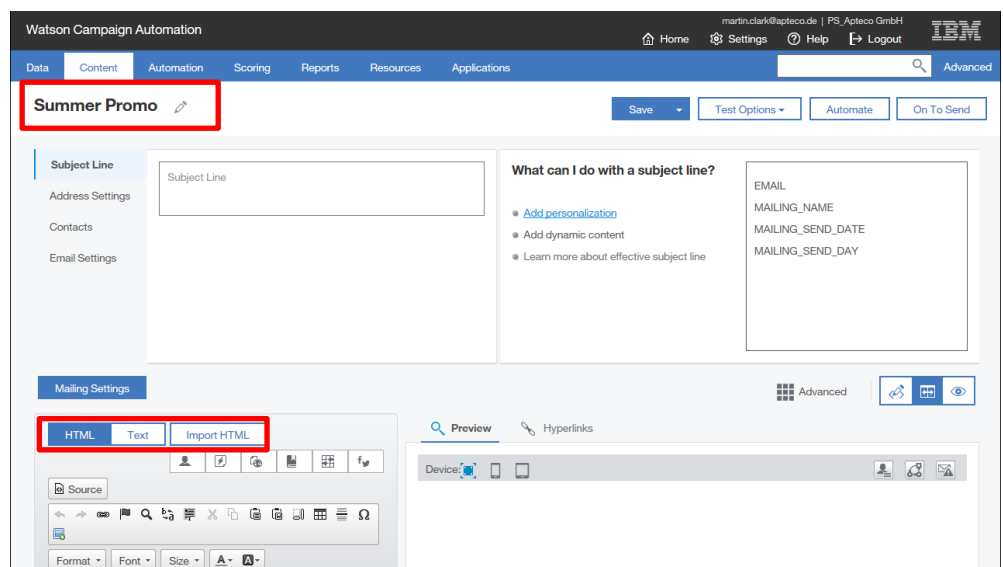
Creating a new Message in SilverPop

1. From: **Content** go to *Mailing Template*



The **Mailing Settings & Content** dialogue opens

2. Enter a **Mailing Name** for the message and complete the rest of the settings as appropriate:
 - Subject Line (dynamic content can be used e.g. “Welcome to Summer %%First Name%%”, you will need to configure the Contacts first
 - Import Message – To import a message



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

3. To further Add/Edit HTML or text content use the **HTML** tab
4. Once complete, click **Save**

Note:

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

Appendix B: API Parameters

Table 9 – Email Response Gatherer Parameters

Parameter	Req.	Default/System Specific*	Description
URL	Y	https://api[pod].silverpop.com/XMLAPI*	The web service on the server that hosts your SilverPop account
ApiProtocol	Y	https*	The communication protocol used with SilverPop, either http or https
FTPURL	Y	transfer[pod].silverpop.com*	The ftp location where your SilverPop responses are generated
TYPECOLUMNNAME	Y	Typically, this will be: Event Type*	This should refer to the column in the Silverpop extract file that holds the message type, i.e. sent, open, click through, etc. The value will get inserted into the MessageType field in the Reponse table.
MESSAGENAMECOLUMNNAME	Y	Mailing Id	
CLICKURLCOLUMNNAME	Y	URL	This should refer to the column in the Silverpop extract file that holds the URL that was clicked. The value will get inserted into the ClickUrl field in the Response table.
CLICKDATECOLUMNNAME	Y	Event Timestamp	This should refer to the column in the Silverpop extract file that holds the date that the Url was clicked. The value will get inserted into the ClickDate field in the Response table.
EVENTTRIGGEREDDATECOLUMNNAME	Y	Event Timestamp	This should refer to the column in the Silverpop extract file that holds the date that the event was produced. The value will get inserted into the EventTriggeredDate field in the Reponse table.

The following data is inserted into the FastStats Email Response Table

	Required	Response Table field	SilverPop extract file column
EMAILCOLUMNNAME	N	Email	Email address
URNCOLUMNNAME	N	Urn	FastStats Urn. Only 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
DELIVERYDATECOLUMNNAME	N	DeliveryDate	Delivery date

Note:

*These settings are specific to each SilverPop 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.
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		Allows you to filter your responses to specific types when reading files from the ftp site
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"> • COMMA (,) • DOUBLEQUOTE ("") • NULL. • SEMI (;) • SPACE () • SINGLEQUOTE (!) • TAB
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 ResponseDetails 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 ResponseDetails 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
URL	Y	https://api[pod].silverpop.com/XMLAPI	The location for the FastStats Service to use
DatedListFormat	Y	yyyMMdd-HHmms	The date format string for the date and time stamp if created
Visibility	Y		Choose your visibility 0 - Private 1 - Shared
ApiProtocol	N	https	
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	Y	transfer[pod].silverpop.com*	The ftp location where your upload will be generated
FTPProtocol	Y	sftp	The type of ftp protocol you will be using to upload your list.
PRIVATEKEYPATH	N		If secure ftp is used above and requires a private key, this should refer to the path and filename of that key
Upload Only Contact List Folder	N		
Upload And Broadcast Contact List Folder			Upload and broadcast contact list folder
Upload Only List Folder			
Upload And Broadcast List Folder			
Client ID	Y		A unique alphanumeric string*
Client Secret	Y		A unique alphanumeric string*
Refresh Token	Y		A unique alphanumeric string*
List Id Column Name			
Master Table	Y		
Encoding	N	UTF8	Enter the encoding of the incoming file

Appendix C: Example Batch File

Example batch file to use with FERG and scheduling

@echo off

REM *****

REM File Name: SilverPopBatchFile.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\SilverPop.txt"

SET LOGFILEDETAILS="Logs\SilverPop_Details.txt"

echo. >> %LOGFILE%

echo. >> %LOGFILEDETAILS%

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

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

echo. >> %LOGFILE%

>> %LOGFILEDETAILS%

echo.

%FERG% SilverPop.xml >> %LOGFILEDETAILS%

IF ERRORLEVEL 9003 goto FailedException

IF ERRORLEVEL 9002 goto FailedLogout

IF ERRORLEVEL 9001 goto FailedDownload

IF ERRORLEVEL 9000 goto FailedLogin

:OK

```
echo %date% %time% - FastStats Gathered SilverPop Responses OK >> %LOGFILE%
```

```
goto Complete
```

```
:FailedLogin
```

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

```
goto Complete
```

```
:FailedDownload
```

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

```
goto Complete
```

```
:FailedLogout
```

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

```
goto Complete
```

```
:FailedException
```

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

```
goto Complete
```

```
:Complete
```

```
echo %date% %time% - Completed FastStats SilverPop 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\SilverPop.xml'.

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

```
%FERG% SilverPop.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.

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.

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