



Apteco

Technical Guide

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

Salesforce Integration Guide DE
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February 2020

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 April 2019

API Version, Authentication Base URI, Base URI options Page 26, 43



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1 Introduction

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

Technology

Salesforce integrates with your FastStats system by utilising both SOAP and RESTful transport over HTTP/S, in conjunction with SFTP. RESTful is utilized when using *Content Builder

Supported Integrations

Salesforce supports all the above integration options.

Type of Integration – User Defined

Salesforce is a User Defined integration meaning you can select variables at run time and create a personalised output based on specific requirements.

*Salesforce Classic Builder allows HTML and Text only Emails, the Content Builder allows you to create Message Templates.

Note:

The Salesforce Marketing Cloud is a highly configurable integration, you may need to contact your Partner or Apteco for help with customising this integration.

This document covers Data Extensions and assumes you are using the Content Builder in Salesforce.

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

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 Salesforce
 - b. API Parameters

Note:

You need to configure Salesforce before you perform the steps in Chapter 4

Useful to have before you start:

You need to know the Salesforce message requirements to match the fields that you upload from FastStats or PeopleStage

Table 1 – Prerequisite Checklist

| Apteco FastStats System or Apteco | Description |
|---|---|
| Database Connection String | Made up of the database server Instance name and FastStats system name |
| Example | <code><SQLServerInstanceName>;Initial Catalog=RS_<SystemName>;User Id=<system_username>;Password=<system_password>;</code> |
| The Digital Integration.zip available from: | https://www.apteco.com/portal/software-releases |
| Decide where you want the FastStats Email Response Gatherer (FERG) to be installed | This will typically be on the same PC as the FERG folders but can be on any PC |
| Decide where your FERG folders are to be created, used to store the .xml and .bat files used when scheduling FERG. | The location to store the results to optimize the processing of campaigns that generate large volumes of data, the Bulk Insert folder must be accessible from SQL Server to use BULK INSERT |

See Appendix A: for instructions on how to obtain the following from your Salesforce Marketing Cloud. You may need to obtain some information from Salesforce.

| | |
|---|--|
| Salesforce Marketing Cloud | [*] Example, this will be specific to your account |
| The Salesforce Username and Password and Account ID for the Salesforce Marketing Cloud | Available from Salesforce |
| The Salesforce File Transfer Location | Recommended “ExactTarget Enhanced FTP” |
| The Salesforce API Username and Password | Available from Salesforce |
| The FTP URL e.g. “ftp1.exacttarget.com” | The FTP endpoint can vary between accounts see: https://developer.salesforce.com/docs/atlas.en-us.noversion.mc-apis.meta/mc-apis/wsd- endpoint-links.htm |
| API Version | All new accounts with Salesforce will be on v2, you can check if your existing API Package is a Legacy API v1 from Setup – Apps > Installed Packages |
| Authentication Base URI | [*] https:// 0f4wbzr4nlfsslwi2u612psbpg7g.rest.marketingcloudapis.com/ |
| Base URI | [*] https://0f4wbzr4nlfsslwi2u612psbpg7g.rest.marketingcloudapis.com/ |
| The API URL in the format - | e.g. https://webservice.exacttarget.com/Service.asmx Check with Salesforce |
| Assign Roles to Sender | See |
| The *Sender Profile Code/s to associate with a broadcast in FastStats or PeopleStage (). | Mouse over the Sender Profile Initials to see the globally unique identifier (GUID) at the bottom of the window, change to uppercase *24C54B21-3708-F123-A4E8-973AF123381B |
| *Client ID and *Client Secret | *g2yTgel9ighz118ps6cWnq3j |
| The Salesforce Message Name | Note: You should also know the content requirements of the message, for example, create a test message using “Firstname” and match the broadcast field in FastStats |
| The Salesforce Send Classification | e.g. Default Commercial |
| Whether you are using the Content Builder or Classic Builder in the Salesforce Marketing Cloud | You must move to Content Builder if you are using the Classic Builder |
| The message Upload Folder under the Data Extensions tree and the Upload Only Folder to organize your broadcasts | These can be absolute paths to the folder, or you can use the following parameters e.g. Root\%LISTNAME%\%MESSAGENAME% |

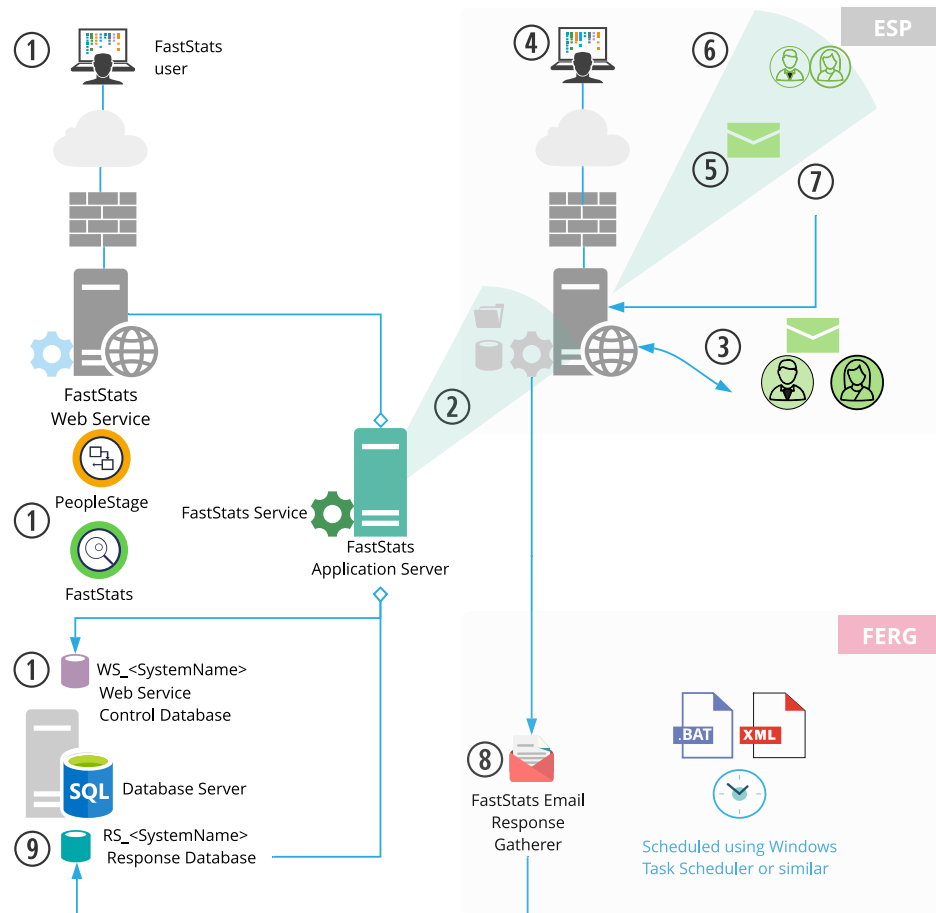
***Example** -You can create individual sender profiles within Salesforce to associate with a broadcast, you create an API Package for each Profile, the codes are specific to that Profile

2 Process Summary

2.1 Architecture

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

Schematic showing campaign scheduling performed in Salesforce.



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 Salesforce SFTP site and then uses SOAP communication to monitor the upload. RESTful communications over https is used when you use the Content Builder
3. Salesforce 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 Salesforce web interface.
5. Salesforce sends Messages to all recipients on the list.
6. Salesforce records any undelivered messages.

3 Apteco System Configuration

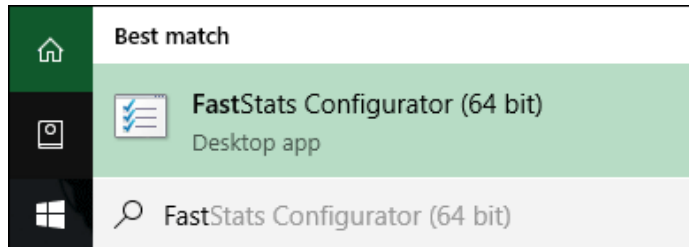
3.1 Creating the Response Database

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

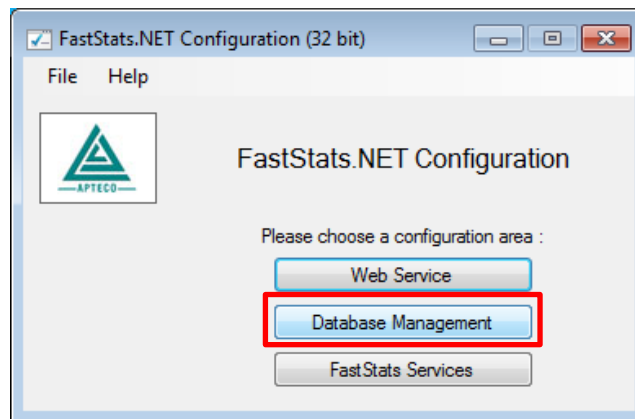
1. Open the FastStats Configurator.

Tip:

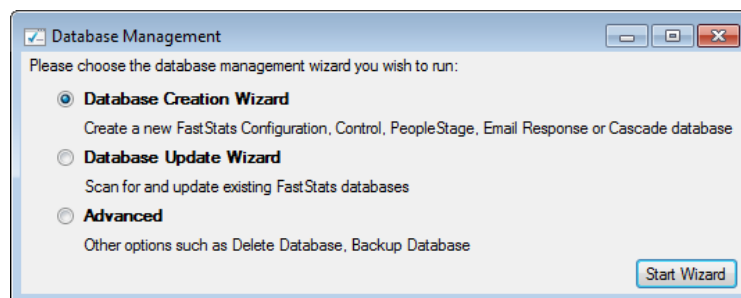
Search for Fast in the Start Menu



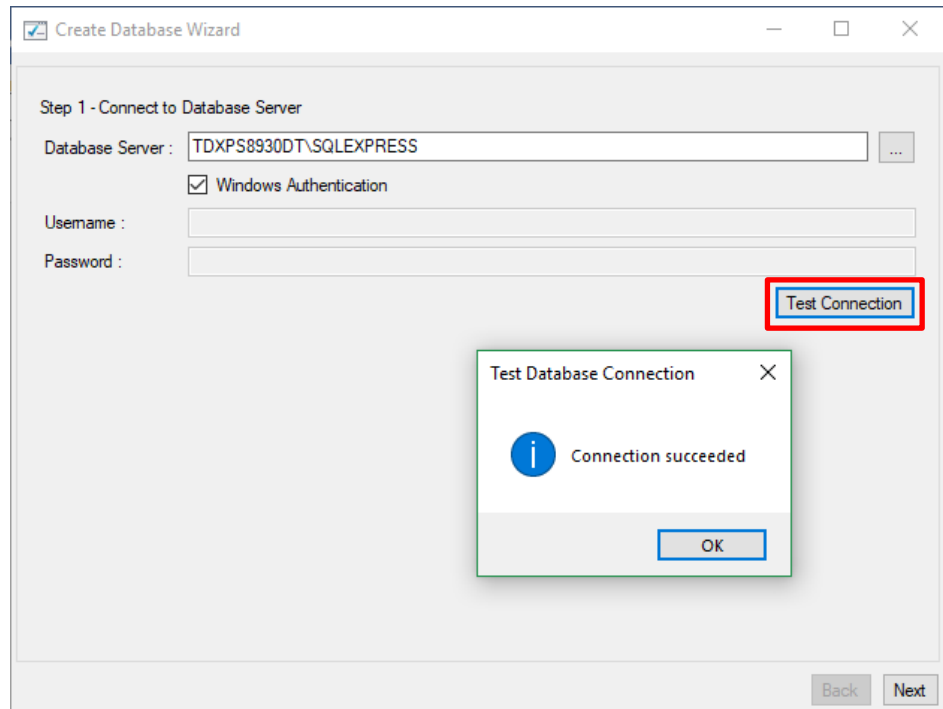
2. Select **Database Management**.



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



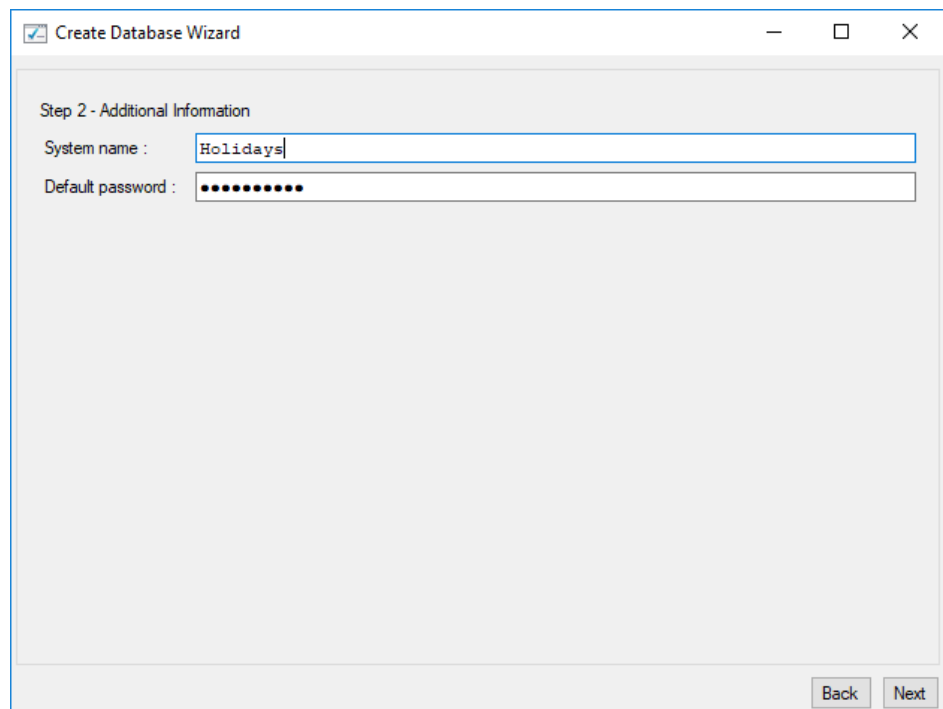
4. Enter the name of the **Database Server** where you wish to store the response database, click **Test Connection**



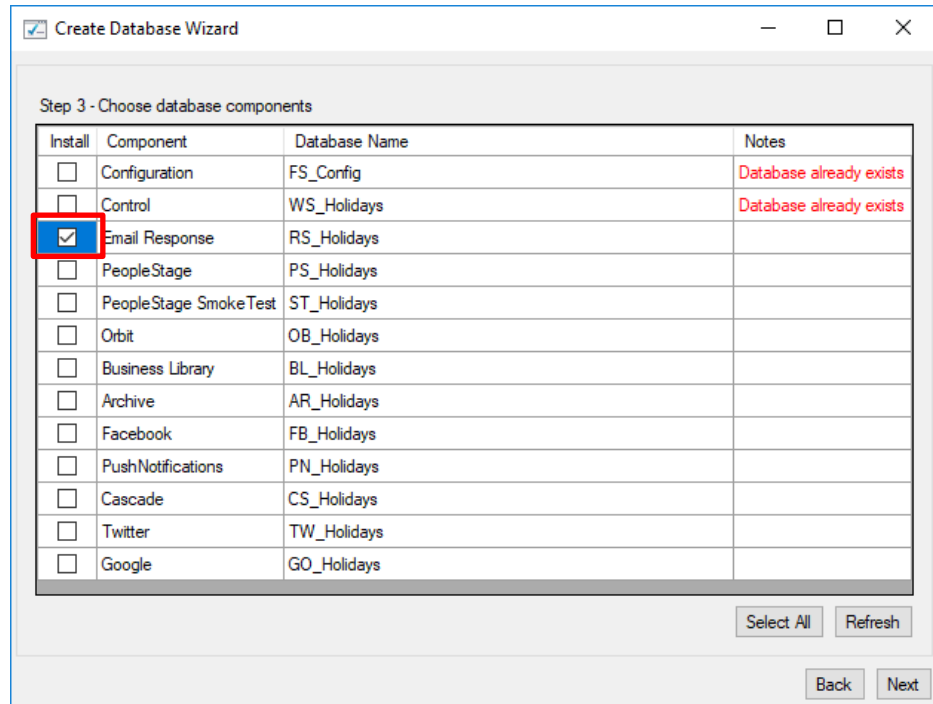
Note:

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.



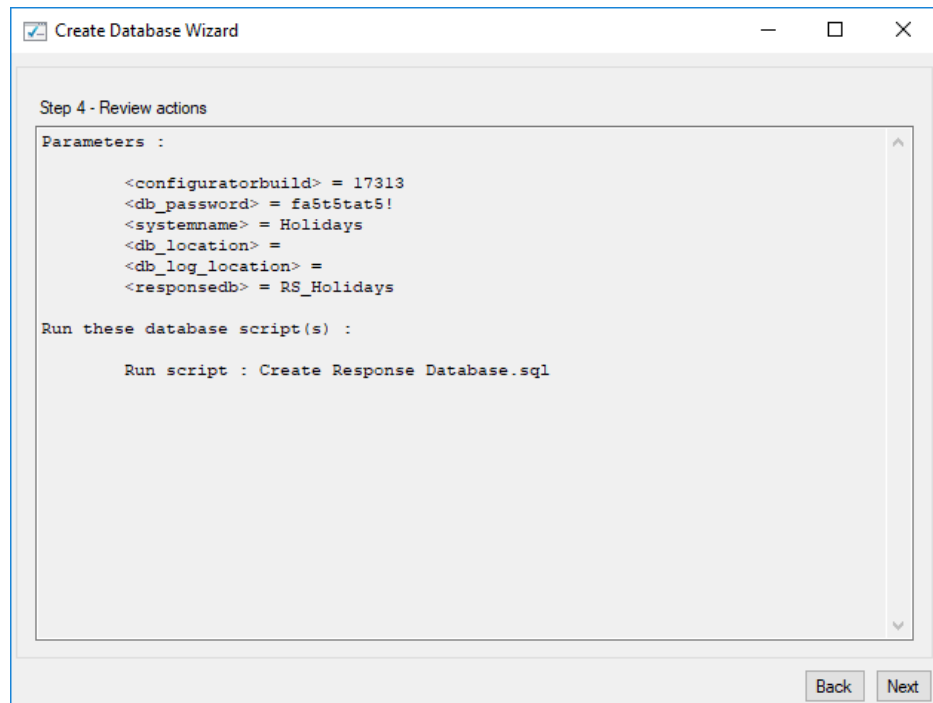
- Select the **Email Response** check box, then click **Next**.



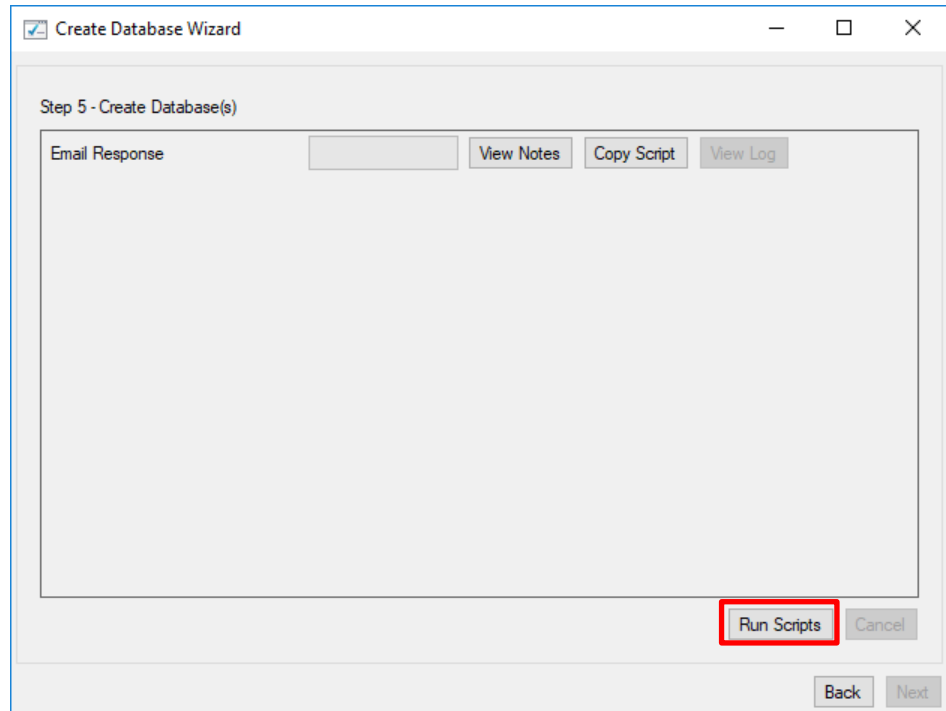
Note:

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.

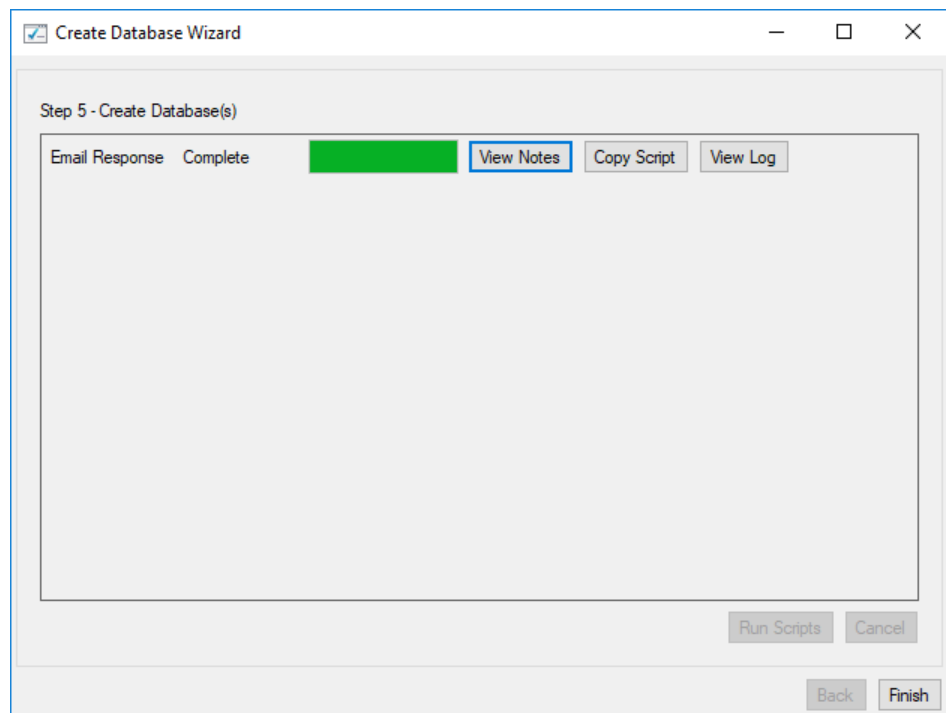
- Click **Next** on the Review actions step.



8. Click **Run Scripts**.



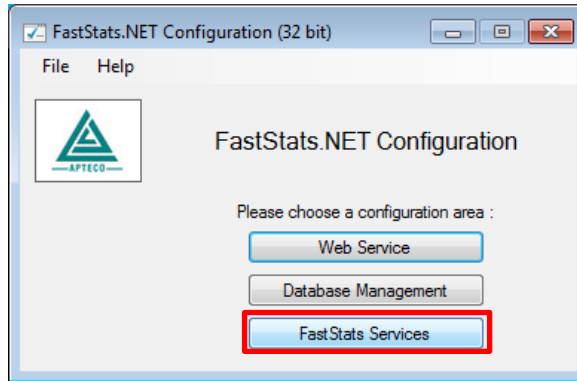
9. Click **Finish**.



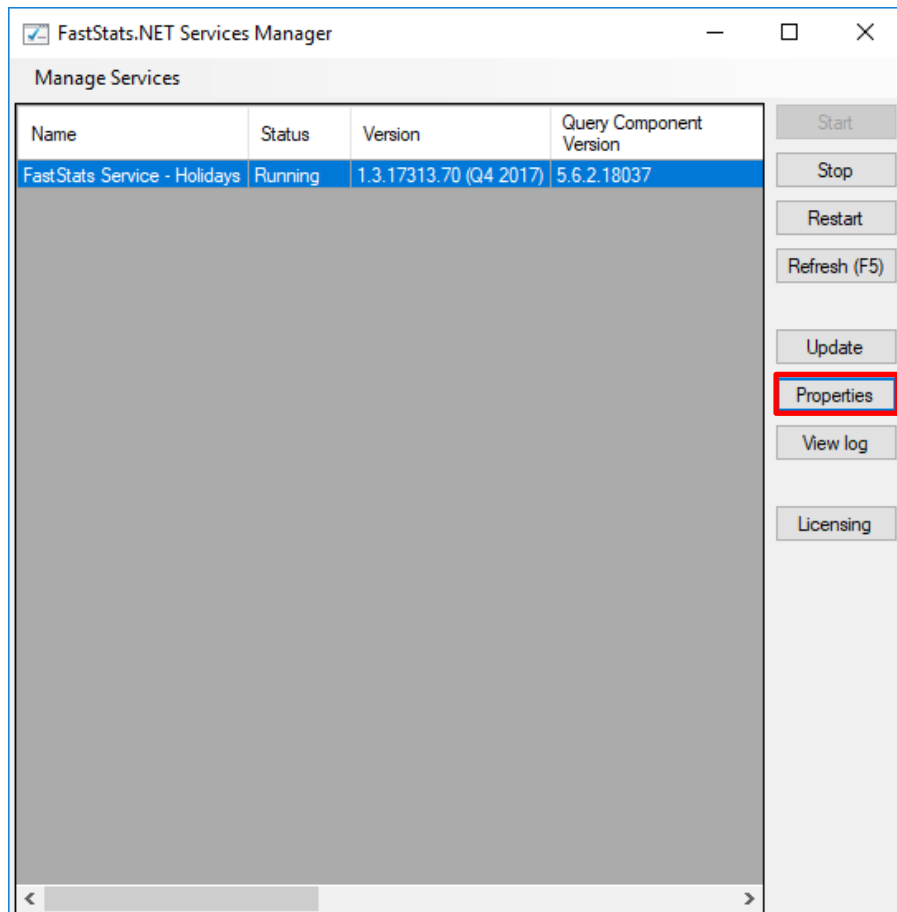
3.2 Linking the Response Database to the FastStats Service

You need link the response database to the FastStats service.

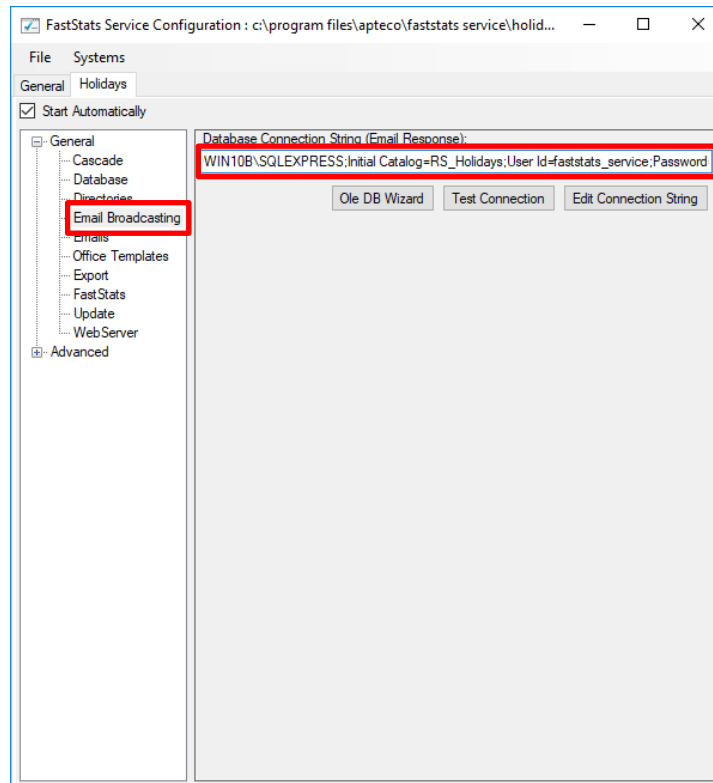
1. Open the **FastStats Configurator**
2. Select **FastStats Services**



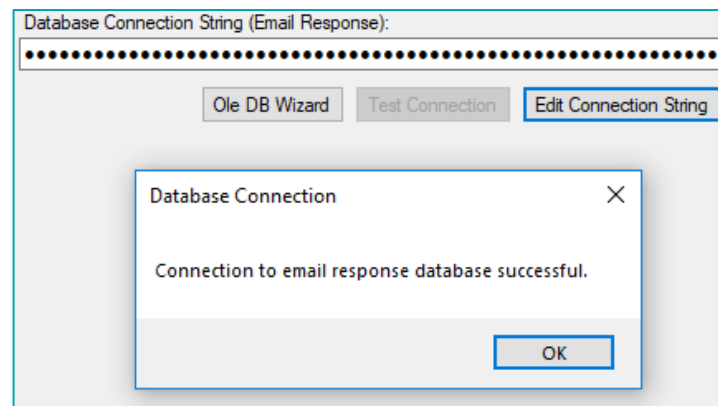
3. Select the **FastStats Service** for the system to link to the response database, click **Properties**



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, Salesforce 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:

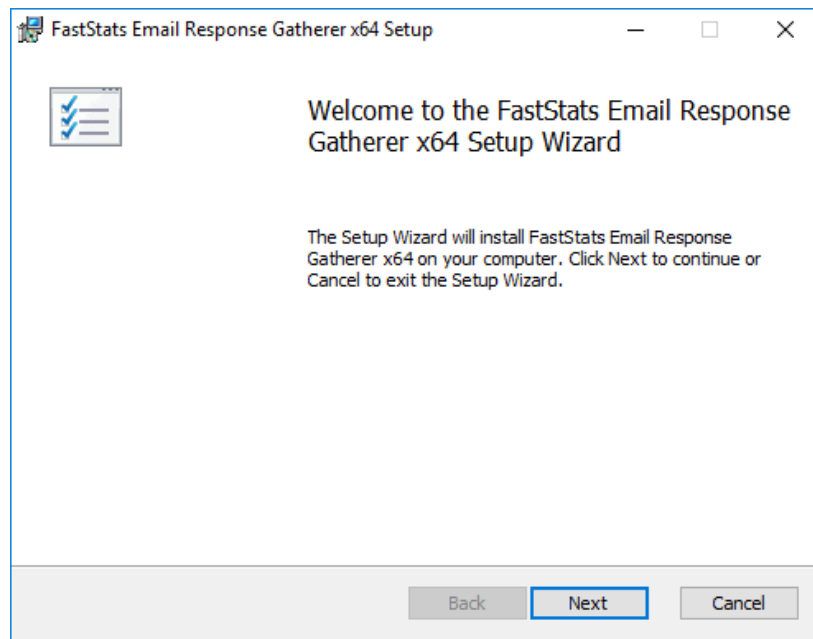
<https://www.apteco.com/portal/software-releases>

Note:

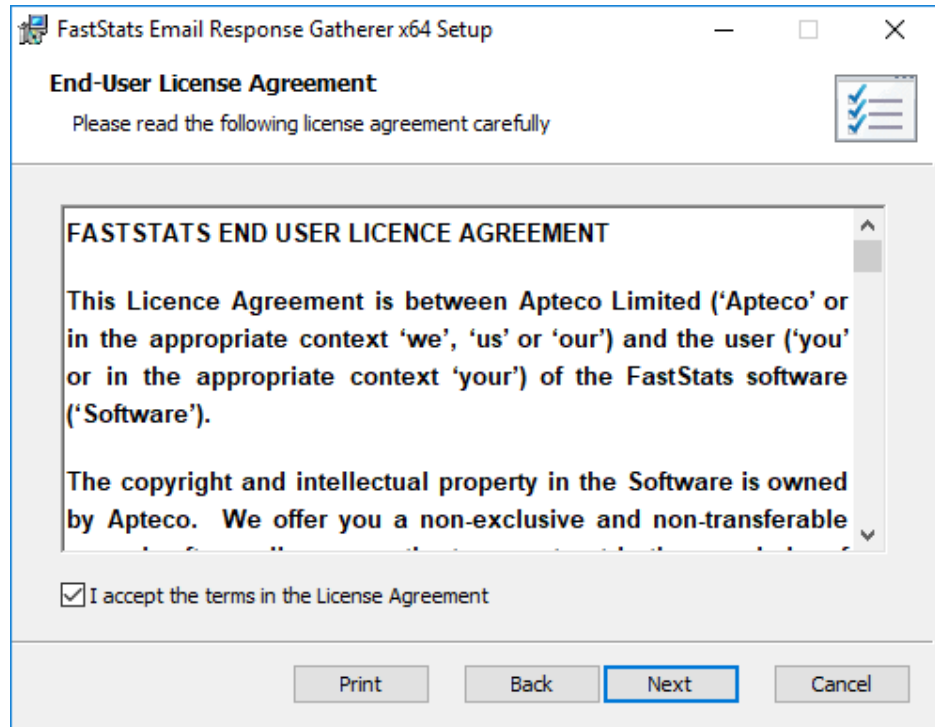
The FastStats Email Response Gatherer application can run on any PC in your system.

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

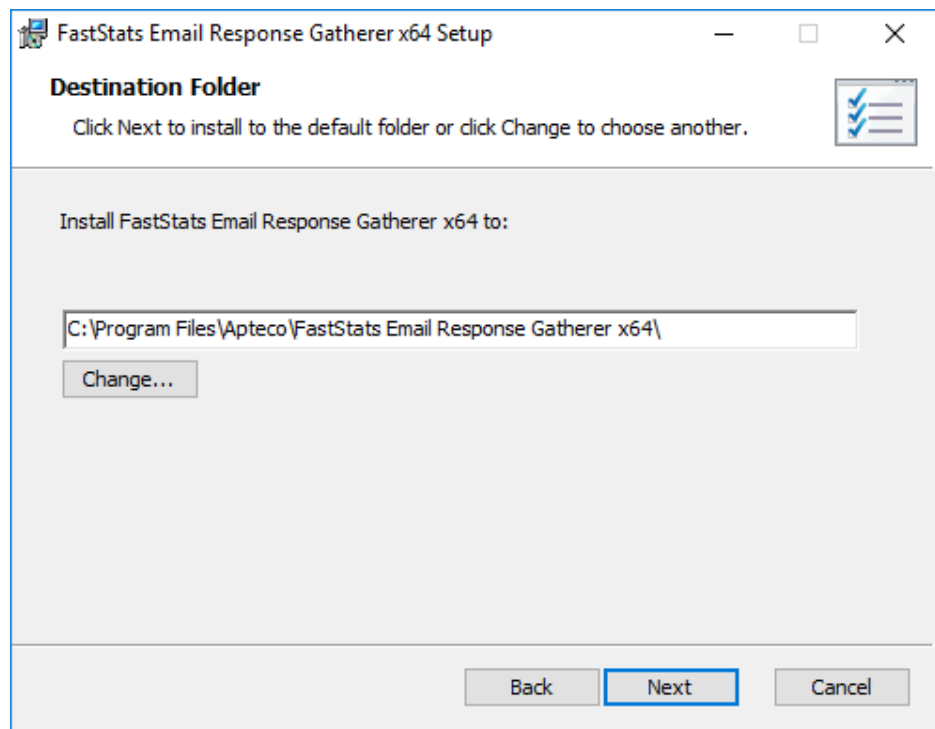
1. Click **Next**.



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



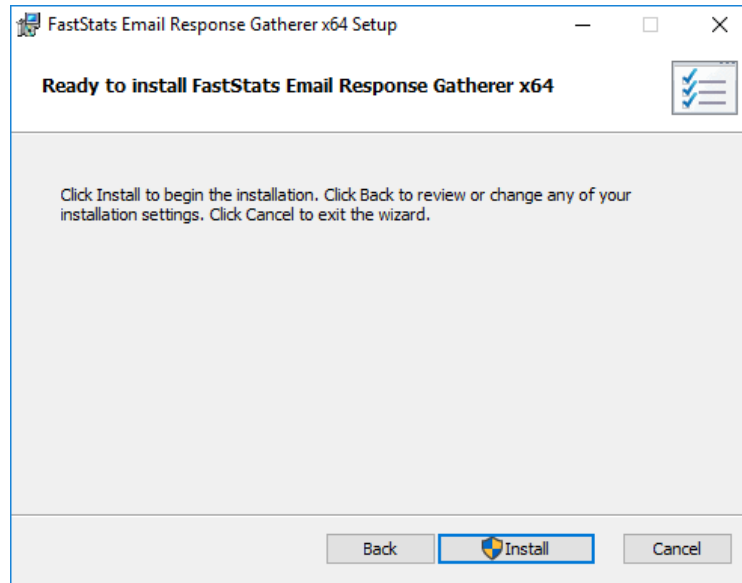
3. Click **Change** if you wish to install the Email Response Gatherer application in a different location then click **Next**



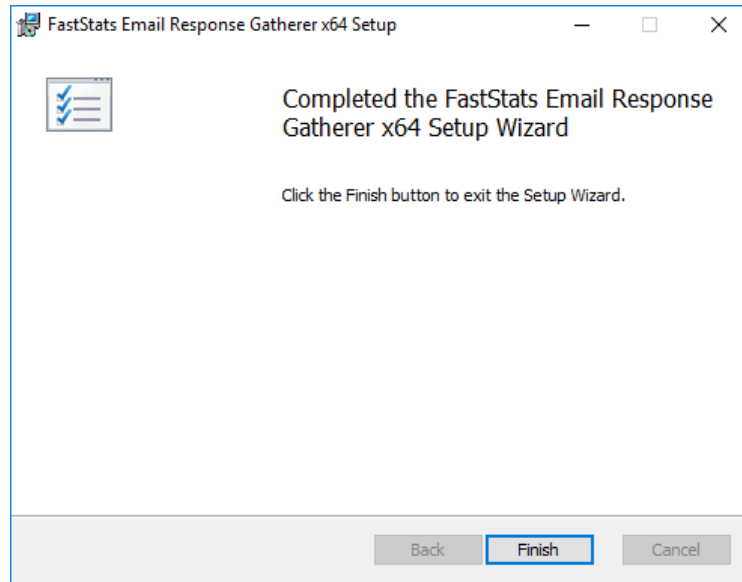
Note:

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

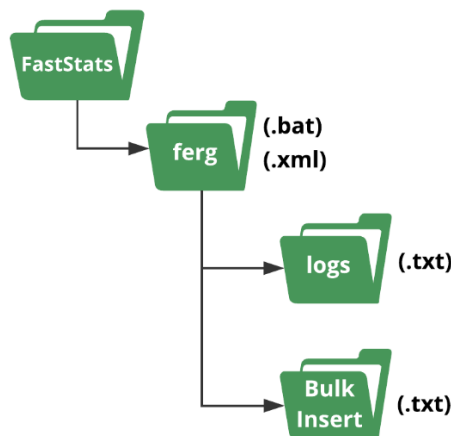
You will need to create folders to store the files to use with the Response Gatherer; these will include the following types of files.

Table 2 – 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.

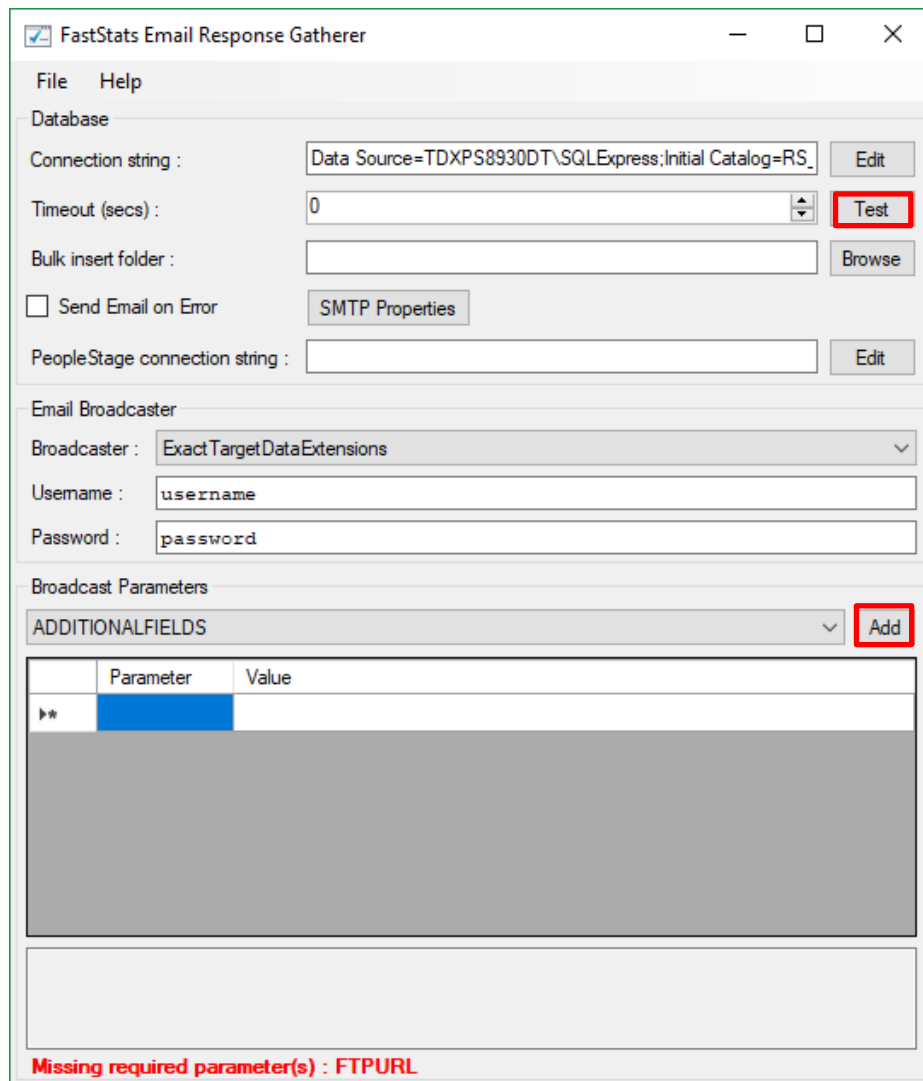
3.5 Creating the Configuration File

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 Salesforce 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



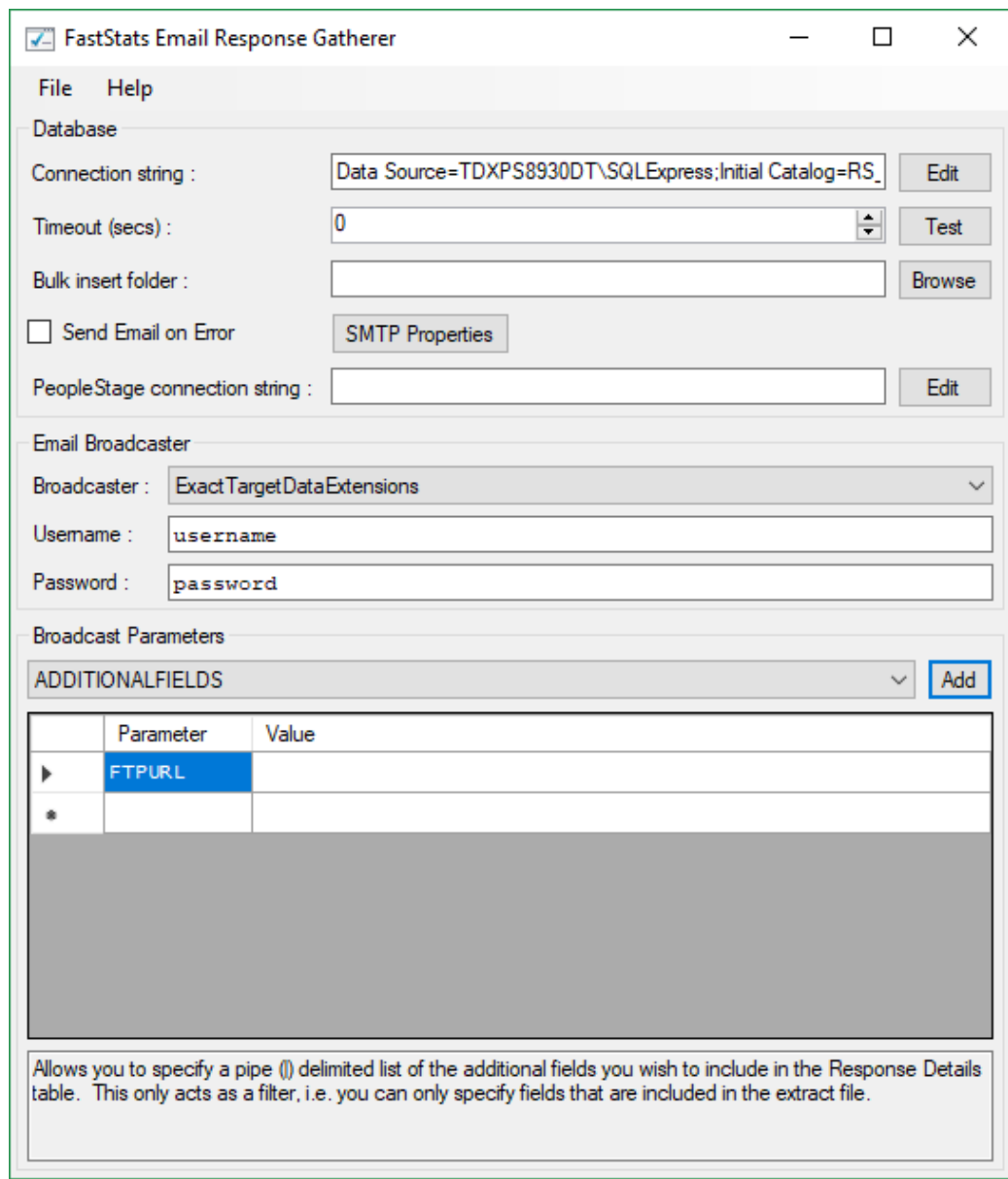
Note:

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

Table 3 – 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 Salesforce |

Email Response Config dialogue with REQUIRED FIELDS completed



See **Appendix A** 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.

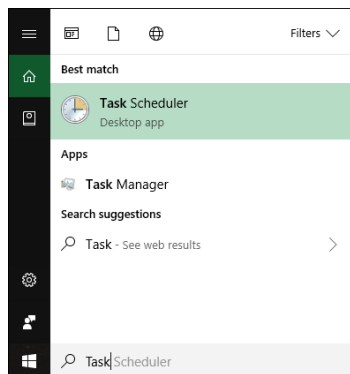
Using Task Scheduler

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

1. Open Windows **Task Scheduler**

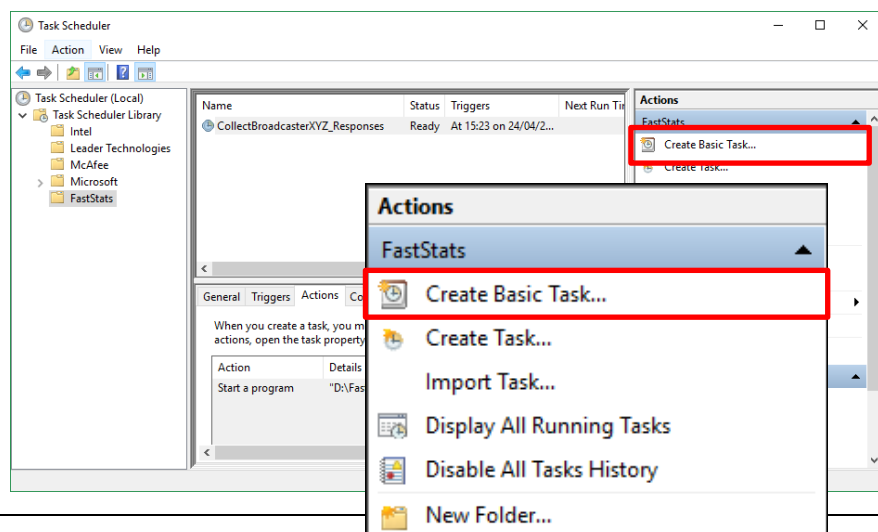
Tip

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

The screenshot shows the 'Create Basic Task Wizard' dialog box. The title bar reads 'Create Basic Task Wizard'. The main heading is 'Create a Basic Task'. Below this, there is a navigation pane with 'Create a Basic Task' selected. To the right, a text box explains: 'Use this wizard to quickly schedule a common task. For more advanced options or settings such as multiple task actions or triggers, use the Create Task command in the Actions pane.' Below this, there are two input fields: 'Name:' with the value 'CollectBroadcasterXYZ_Responses' and 'Description:' with the value 'Scheduled Response Collection for XYZ'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

4. Task Trigger step

a. Select the Trigger interval

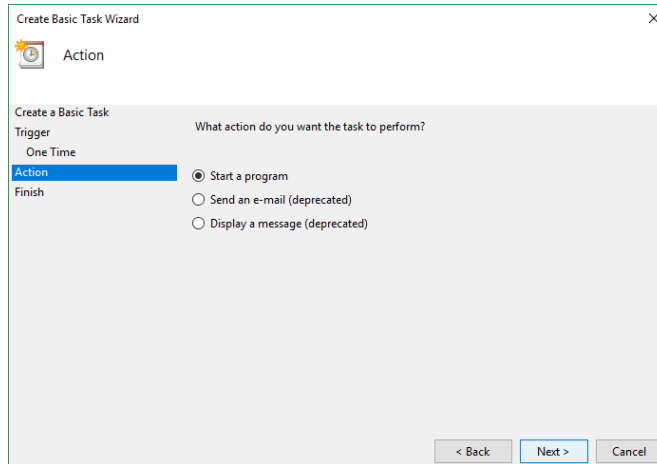
The screenshot shows the 'Create Basic Task Wizard' dialog box at the 'Task Trigger' step. The title bar reads 'Create Basic Task Wizard'. The main heading is 'Task Trigger'. Below this, there is a navigation pane with 'Task Trigger' selected. To the right, the heading is 'When do you want the task to start?'. Below this, there are several radio button options: 'Daily', 'Weekly', 'Monthly', 'One time' (which is selected), 'When the computer starts', 'When I log on', and 'When a specific event is logged'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

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

The screenshot shows a 'Start' field with a date input of '23/04/2018' and a time input of '17:00:00'. To the right of the time input is a checkbox labeled 'Synchronize across time zones'.

5. **Action** step

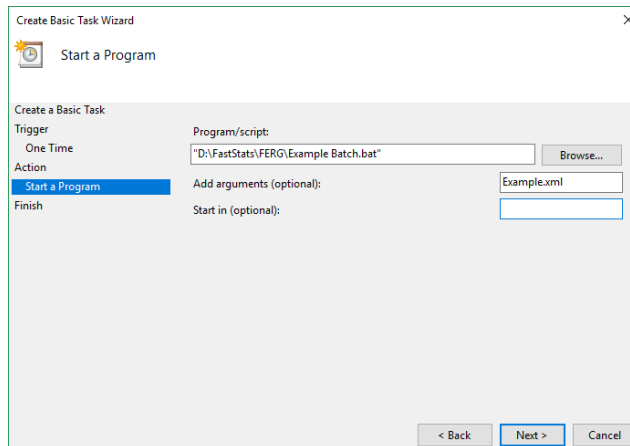
- a. Select **Start a program** and click **Next**



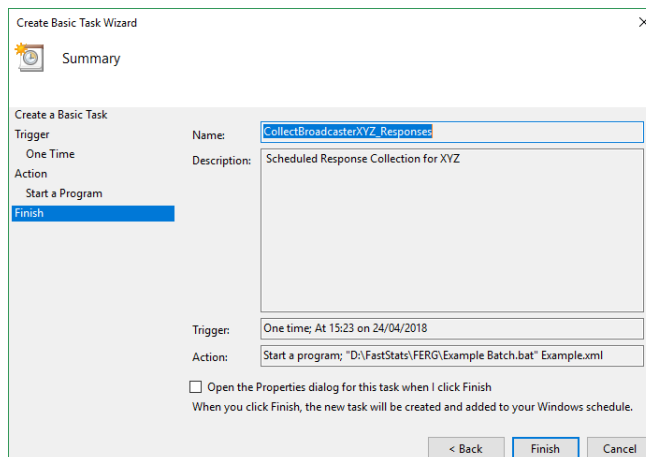
6. **Start a Program** Step

- 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

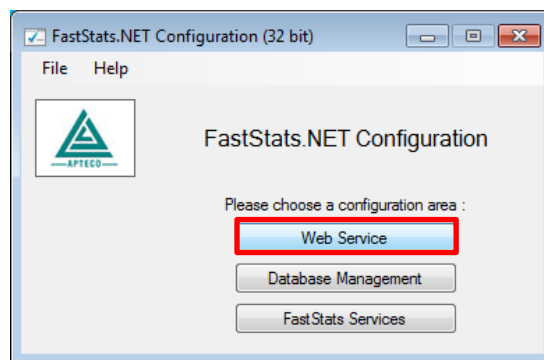
Notes:

You must log in as an administrator to perform the following task.
The Email Broadcasting Wizard is required for FastStats use only.

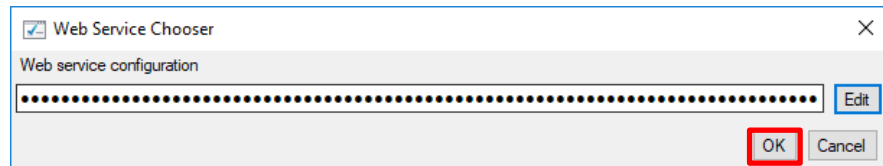
4.1 Enable Email Broadcasting

You must enable the Email Broadcasting wizard plugin.

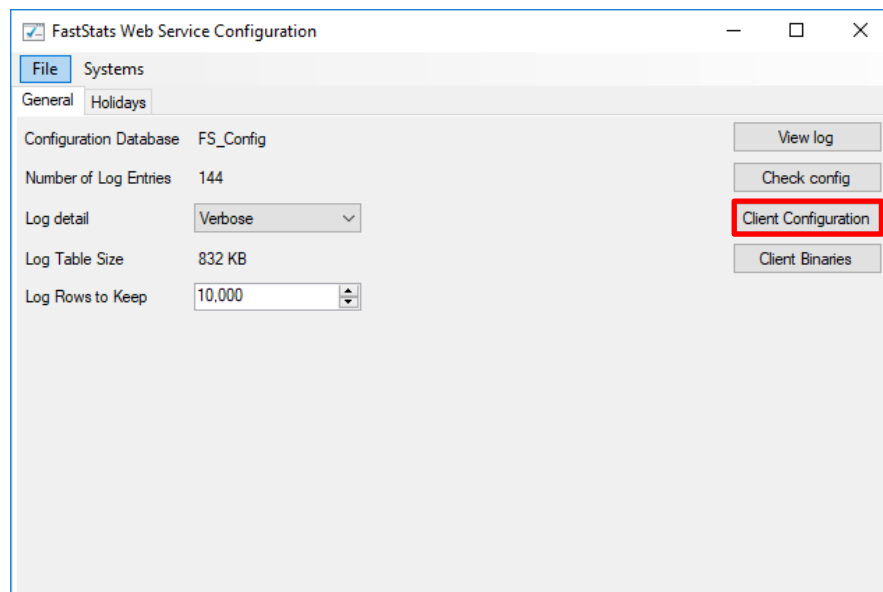
1. Open the **FastStats Configurator**
2. Select **Web Service**



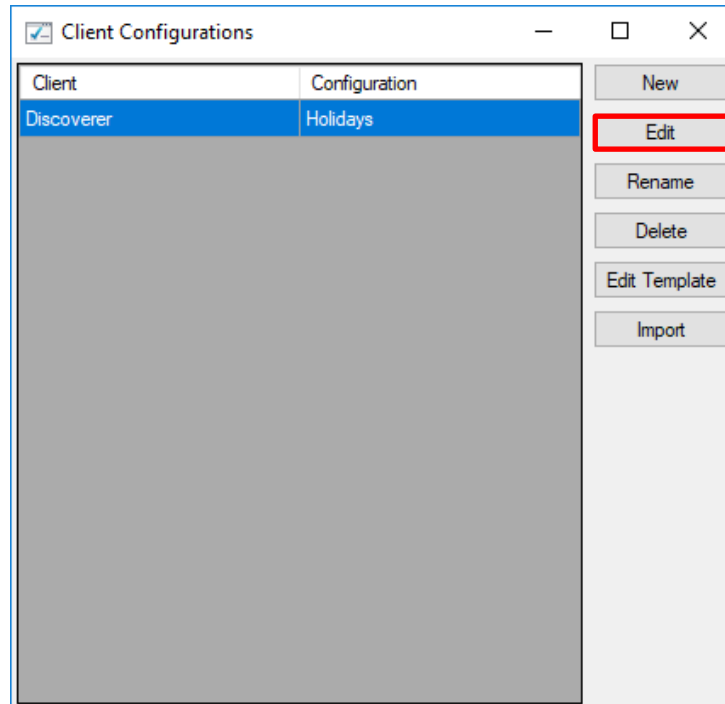
3. Click **OK** on the Web Service Chooser dialogue box



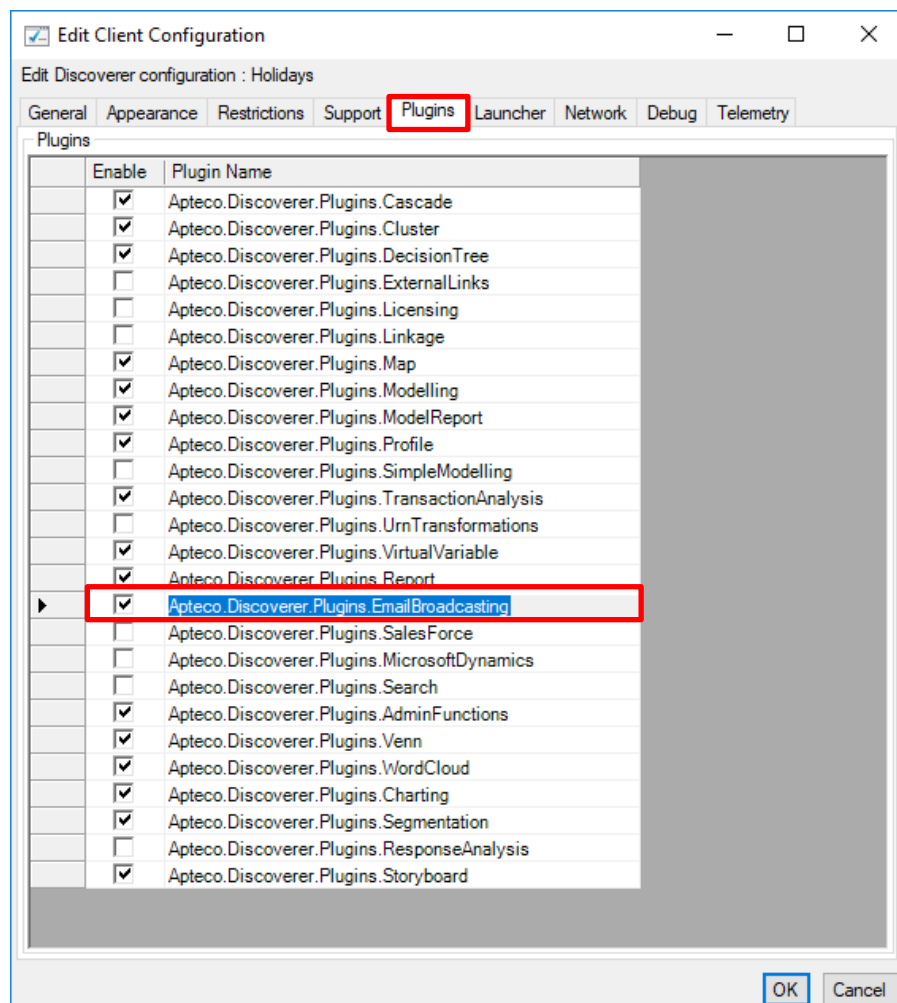
4. Click **Client Configuration**



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

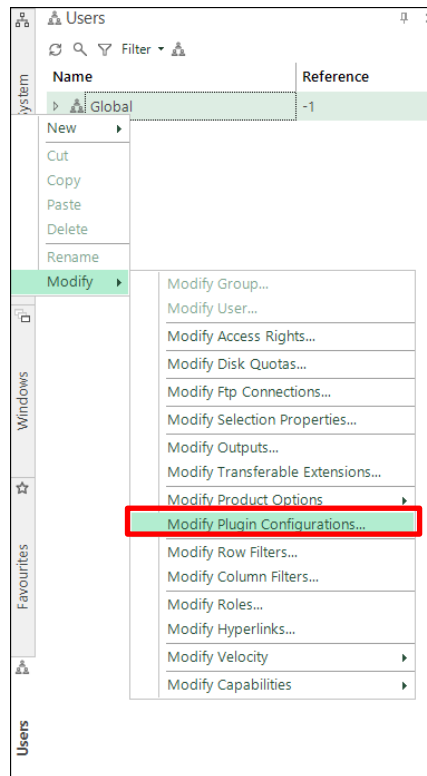


6. On the Plugins tab ensure the **Apteco.Discoverer.Plugins.EmailBroadcasting** check box is selected then click **OK**

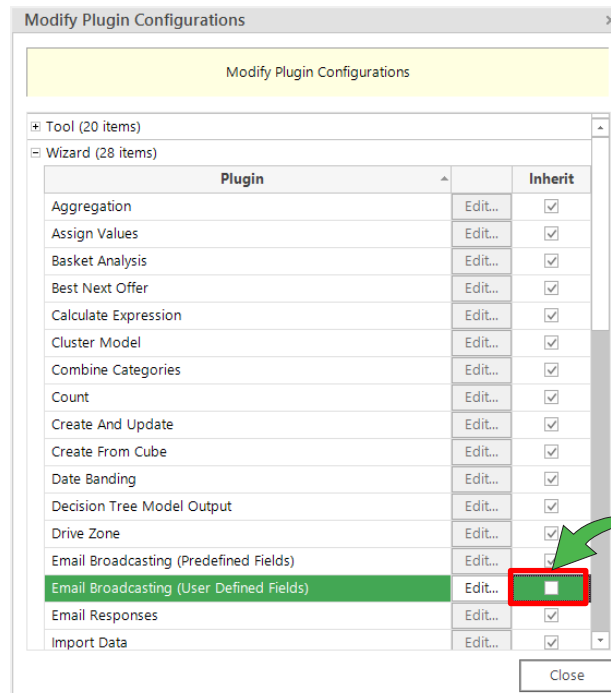


4.2 Configuration in FastStats

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

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

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

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

Note:

The Salesforce Marketing Cloud is a highly configurable system, many of the parameters listed below are not documented here, they are marked as “Reserved for advanced use”. For more information on how to obtain the values for *commonly used parameters please see Appendix A.

Table 4 – Edit Template Known Parameters Settings

| Parameter | Reqd. | Settings to use |
|---------------------------------|--------|--|
| Email Content | Y | Select which builder you are using in the Salesforce Marketing Cloud, options are: <ul style="list-style-type: none"> • Classic • Builder • Both |
| API Version | Y | All new accounts with Salesforce will be on v2, you can check if your existing API Package is a Legacy API v1 from Setup – Apps > Installed Packages |
| RESTful Authentication Base URL | (v2 Y) | e.g. https://0f4wbzr4nlfsslwi2u612psbpg7g.rest.marketingcloudapis.com/ |
| RESTful Base URL | (v2 Y) | e.g. https://0f4wbzr4nlfsslwi2u612psbpg7g.rest.marketingcloudapis.com/ |
| *Client Id | Y | Client ID for the Profile |
| *Client Secret | Y | Client Secret for the Profile |
| Api Timeout | | Timeout (in secs) to wait for API the default is 300 |
| Triggered Send Definition | | Reserved for advanced use |
| Use Triggered Sends | | Reserved for advanced use |
| Sendable | Y | true |
| Publication List | | Reserved for advanced use |
| Triggered Send Data Extension | | Reserved for advanced use |
| Use Urn As Subscriber Key | | true |
| Subscriber Key Name | | Subscriber Key |
| *Send Classification | Y | e.g. Default Commercial see the setting in the Marketing Cloud Admin > Send Classifications section |
| *File Transfer Location | Y | ExactTarget Enhanced FTP See the setting in the Marketing Cloud Admin > File Locations |
| *Sender Profile | Y | A GUID obtained from the Marketing Cloud Admin > Sender Profiles |
| * Business Unit | | Optional, used where there are more than one business unit |
| Data Extension Retention Period | | Reserved for advanced use |

| | | |
|-----------------------------|---|--|
| Owner Member ID | | Reserved for advanced use |
| Owner Member Name | | Reserved for advanced use |
| URL (API URL) | Y | https://webservice.exacttarget.com/Service.asmx |
| Upload and Broadcast Folder | Y | The message Upload folder under the Data Extensions tree to organize your broadcasts, this can be an absolute path to the folder, or you can use the following parameters, e.g. <FolderPath>\%LISTNAME%\%MESSAGENAME% where FolderPath is a folder or path in your Data Extensions tree. |
| Upload Only Folder | Y | The Upload only folder where Salesforce your broadcasts that will the same options as above can be used here. |
| Upload Empty Lists | Y | True |
| SFTP Private Key Path | | Reserved for advanced use |
| Dated List Format | | yyyyMMdd-HHmms |
| FTP Protocol | | ftp |
| FTP Username | Y | Obtain this from Salesforce |
| FTP Password | Y | Obtain this from Salesforce |
| Throttle Start Time | | Reserved for advanced use |
| Throttle End Time | | Reserved for advanced use |
| Throttle Limit | | Reserved for advanced use |
| Encoding | | UTF8 |
| Account Username | | This is the username that has been setup within Salesforce |
| Use Dated List | | True (check-box selected) |
| *FTP URL | | sftp://username:pwd@ftp.apteco.com/folder/{FILENAME} |
| Encoding | | Default |

Note:

*These settings will be specific to your Salesforce account.

Note:

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

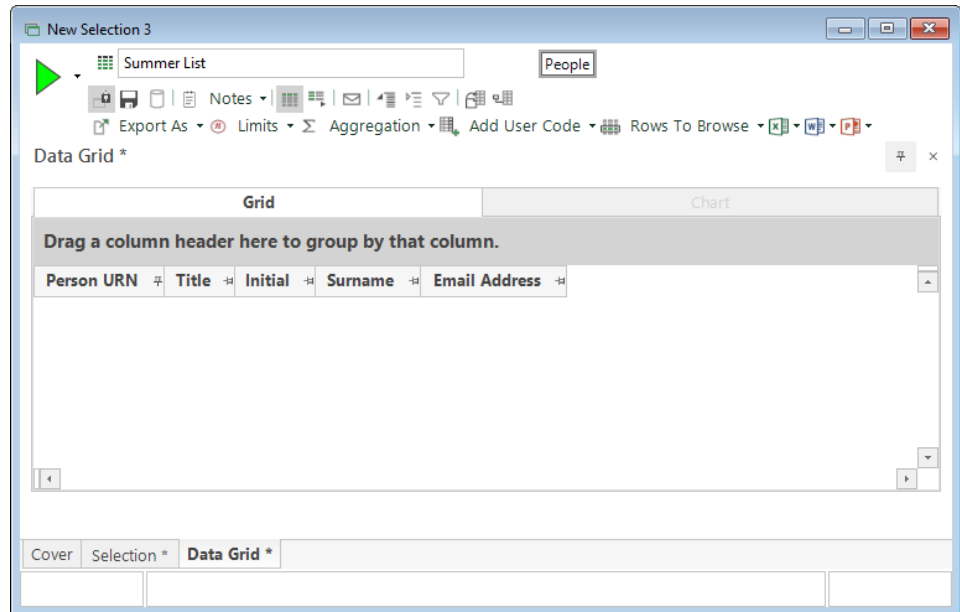
4.3 Checking your configuration

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.

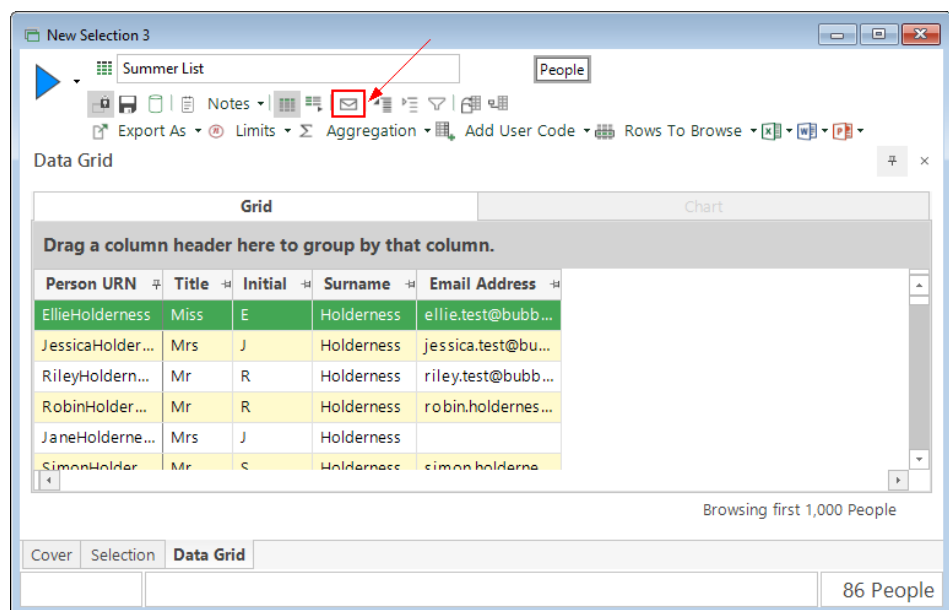
Note:

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

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



2. Click the **Email Broadcasting** icon

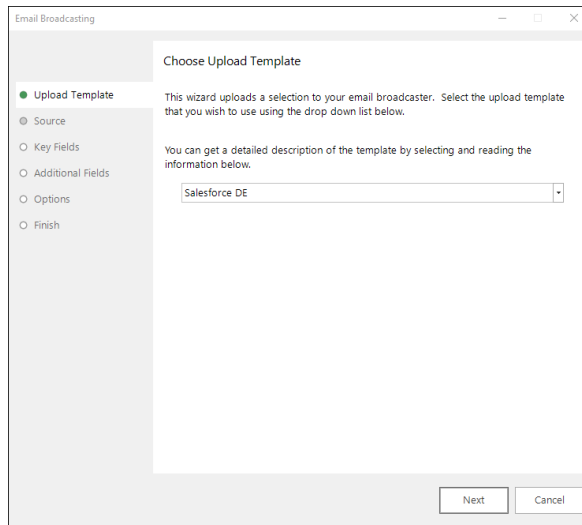


The **Email Broadcasting Wizard** opens

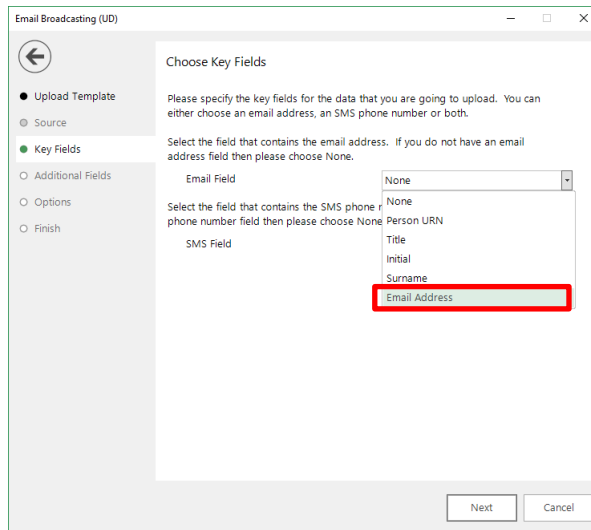
3. Choose the **Salesforce** template from the drop-down list and click **Next**

Note:

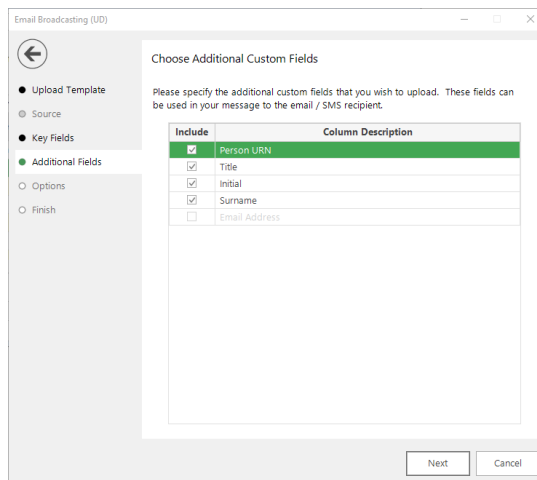
The wizard will omit this step if you have only one Upload Template



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**

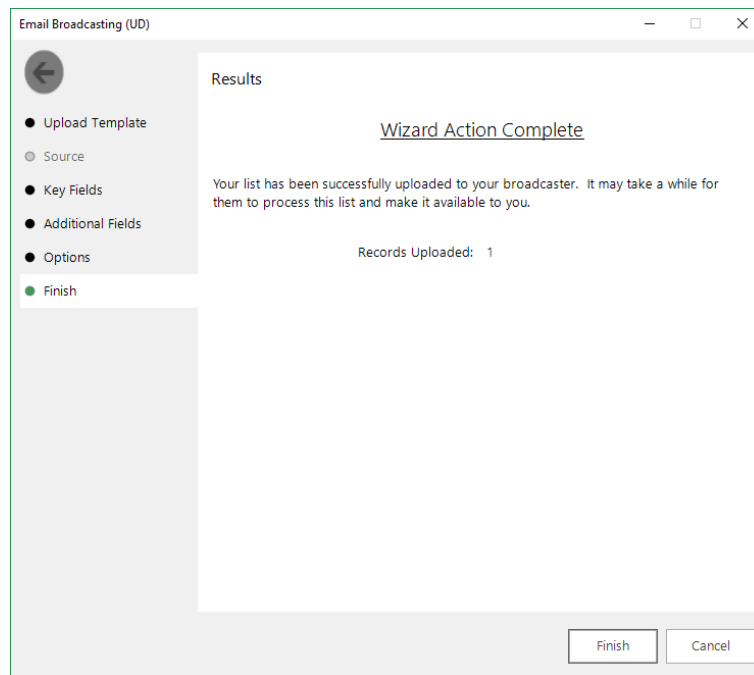
Table 5 – EmailResponseGatherer.exe.config Settings

| Option | Settings to use |
|--|---|
| Username | The username for your Salesforce account |
| Password | The password for your Salesforce 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

- 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**

Choose Message

This wizard will show information on the responses to an email broadcast campaign and allow you to create a virtual variable from this information.

Please enter the name of the message you want to get information for:

Summer Promotion

Next Cancel

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

Message Response Information

This is the response information for message: Summer Promotion

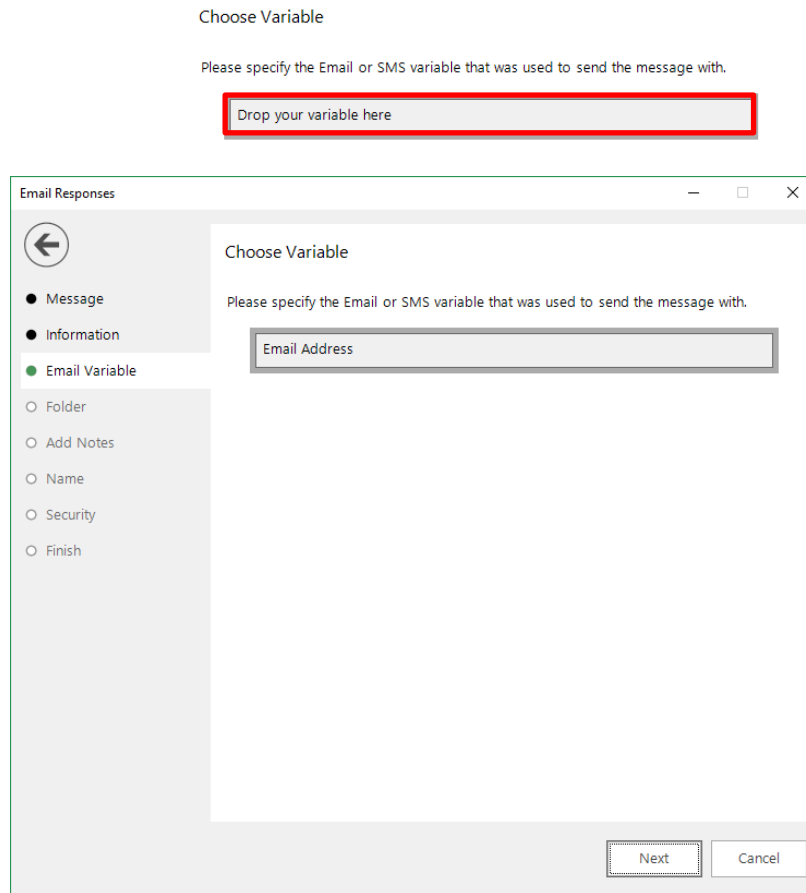
| | |
|-----------------|----|
| Unopened | - |
| Bounced | 0 |
| Opened | 29 |
| Clicked through | 13 |
| Opted in | 7 |
| Opted out | 0 |

Would you like to create a variable containing this response information?

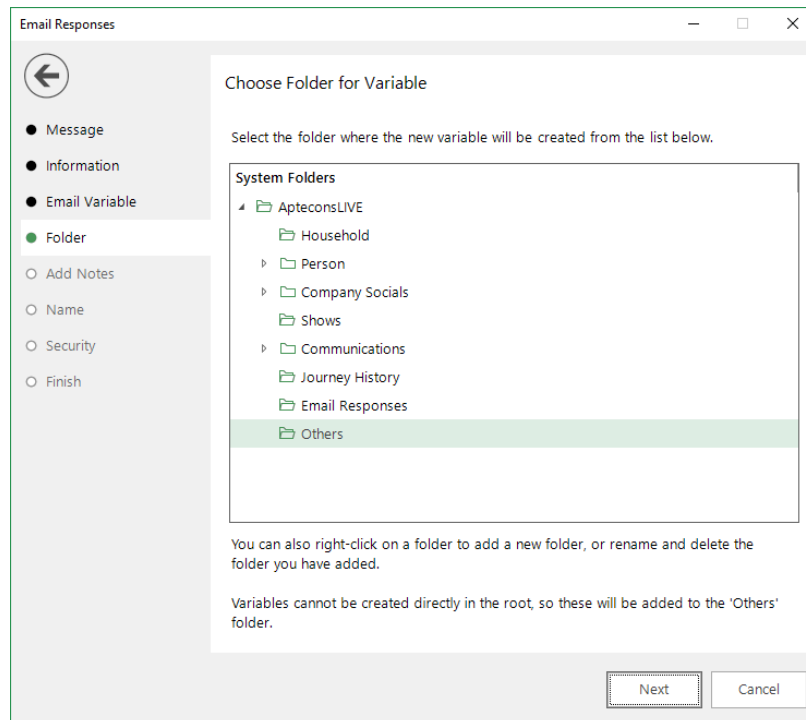
Create a virtual variable from this information

Next Cancel

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



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



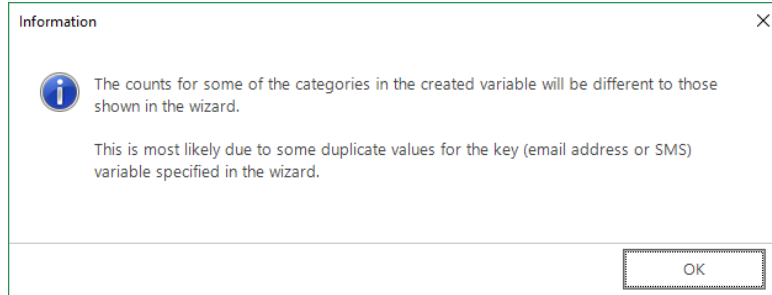
6. Enter any notes that will be stored along with the virtual variable and click **Next**

The screenshot shows a dialog box titled "Email Responses" with a sub-header "Add Notes to Variable". On the left, there is a navigation menu with options: Message, Information, Email Variable, Folder, Add Notes (selected), Name, Security, and Finish. The main area 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.

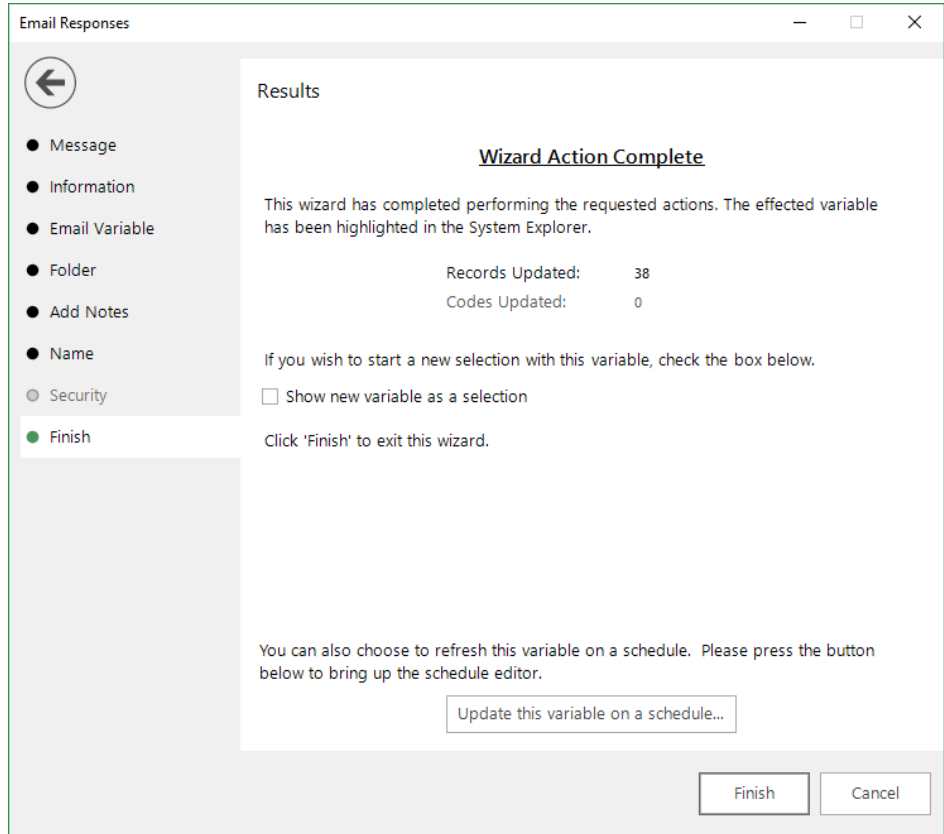
7. Enter a Description for the virtual variable or drag an existing virtual variable onto the drop box if you wish to overwrite it. Modify the Security Attributes if applicable and then click **Next**

The screenshot shows a dialog box titled "Email Responses" with a sub-header "Choose Variable Description". On the left, the navigation menu is updated: "Add Notes" is now selected, and "Name" is highlighted. The main area 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" field containing the text "Summer Promotion Response", which is highlighted with a red box. The text continues: "Alternatively you can choose to overwrite an existing virtual variable with these new values. Drag the variable to be overwritten onto the panel below." Below this is a grey box labeled "Drop the variable to overwrite here". Further down, there are two checkboxes: "Create URN Snapshot" (unchecked) and "Modify Security Attributes" (unchecked). At the bottom, there is a progress bar showing "0%" and "Next" and "Cancel" buttons.

8. Click **OK**



9. Click **Finish**

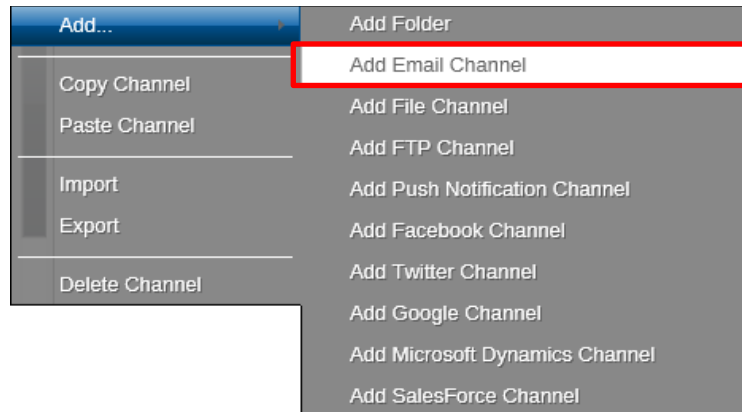


5 PeopleStage Broadcasting & Responses

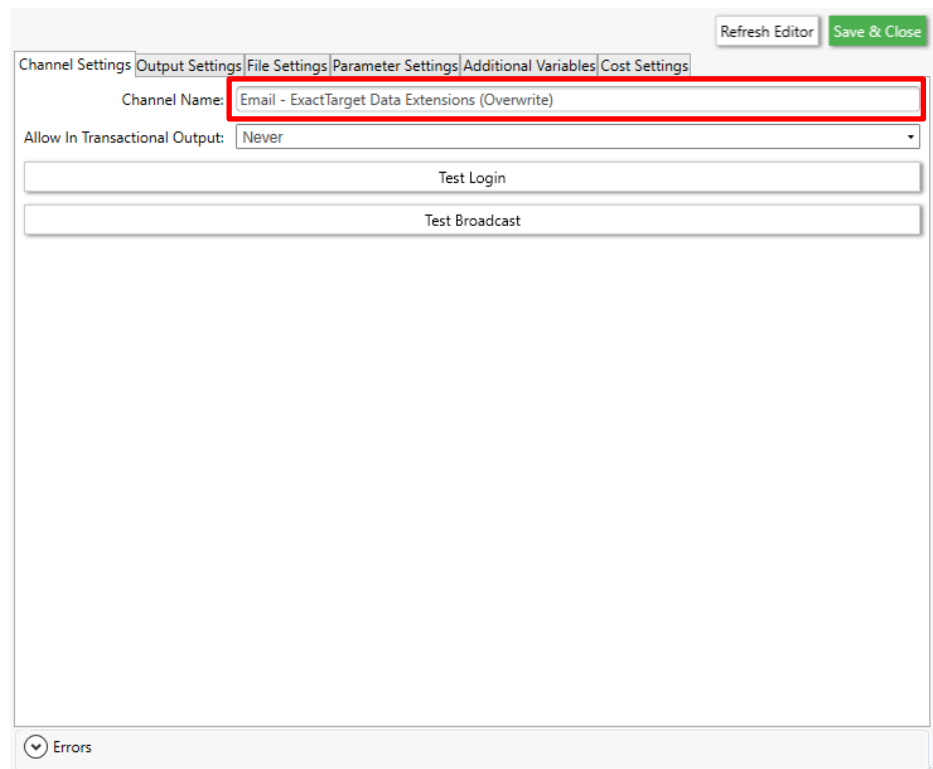
5.1 Defining the Broadcast Channel in PeopleStage

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

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 Salesforce

Table 6 –PeopleStage Output Settings

| Field | Settings |
|---|---|
| Broadcaster | Select ExactTargetDataExtensions from the drop-down |
| Username | Enter your API username |
| Note: Prefix the username with the account name separated by a full stop | |
| 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 Salesforce |
| 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 Salesforce. |
| 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

Table 7 –Example PeopleStage Parameter Settings

| Field | Settings |
|---------------------------------|--|
| | *Example, these will be specific to your account and you may need to contact salesforce, see Appendix A |
| FTP Username | *10345678 |
| FTP Password | *6Da.fp.4L |
| Send Classification | *Default Commercial |
| URL (API URL) | * https://webservice.exacttarget.com/Service.asmx |
| FTP URL | *sftp://10345678: 6Da.fp.4L@ftp.exacttarget.com/<folder> |
| Sender Profile | * 24C54B21-3708-F123-A4E8-973AF123381B |
| Use Urn As Subscriber Key | true |
| FTP Protocol | ftp |
| Upload Empty Lists | false |
| Subscriber Key Name | Subscriber Key |
| File Transfer location | ExactTarget Enhanced FTP |
| Upload And Broadcast Folder | These can be absolute paths to the folder, or you can use the following parameters e.g. Root\%LISTNAME%\%MESSAGENAME% |
| Upload Only Folder | |
| Use Dated List | If set to “true” you will create a new list in Salesforce for each broadcast |
| Encoding | UTF8 |
| Client ID | Client ID for the Profile |
| Client Secret | Client Secret for the Profile |
| Email Content | Use Both or Content Builder should match how the content was created |
| Api Version | All new accounts with Salesforce will be on v2, you can check if your existing API Package is a Legacy API v1 from Setup – Apps > Installed Packages |
| RESTful Authentication Base URL | e.g. https:// 0f4wbzr4nlfsslwi2u612psbpg7g.rest.marketingcloudapis.com/ |
| RESTful Base URL | e.g. https://0f4wbzr4nlfsslwi2u612psbpg7g.rest.marketingcloudapis.com/ |

See **Appendix A** 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

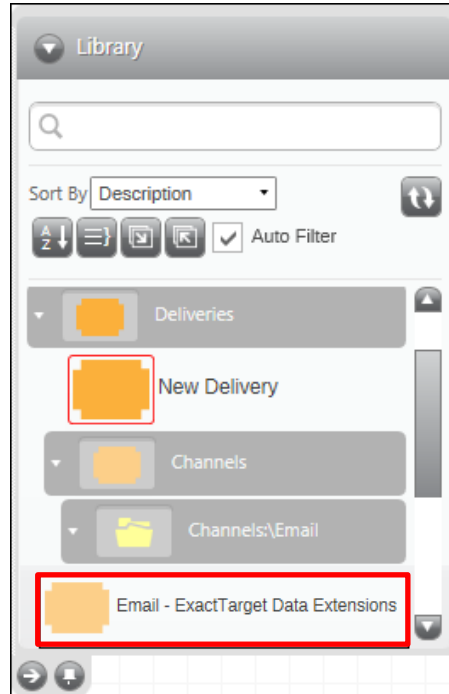
Additional Variables Location: End

Errors

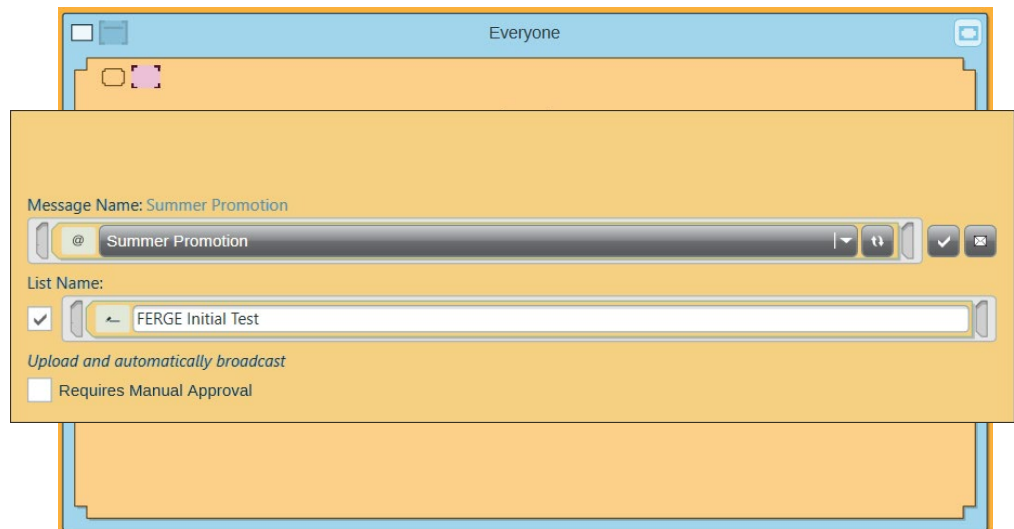
5.2 Broadcasting in PeopleStage

You can now test your channel at any Delivery Stage

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



2. You can select from the available messages in Salesforce 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: Salesforce Configuration

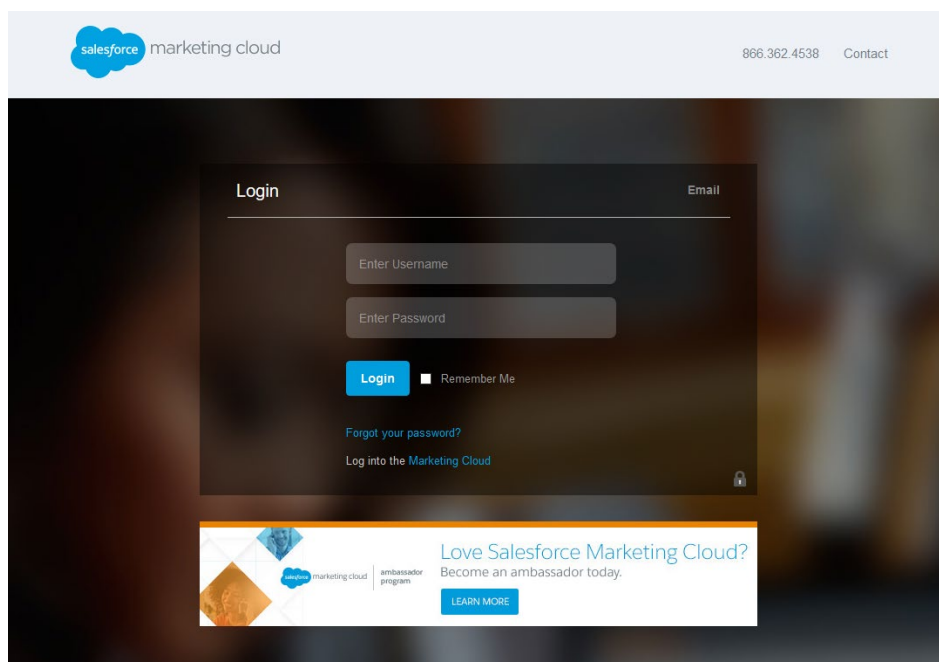
Salesforce Data Extensions works on the principle of having a defined location to store the lists you upload. FastStats or PeopleStage will upload a list of subscribers and insert them into the Salesforce folders.

If you wish to automatically broadcast the list to a message either from the Email Broadcast wizard or PeopleStage, you need to create a message within Salesforce and you will need to create a Package in the Administration area as part of the setup in your Salesforce account.

Note:

This section is not intended as a full manual on setting up your messages in the Salesforce Marketing Cloud please refer to the Salesforce help for more information.

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



Note:

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

Note:

See the Salesforce Marketing Cloud for help with migrating your content to the new “Content Builder” or for help using the Content Builder to organize your images and folders.

Settings in Salesforce

To use the Content Builder you will need to ensure an API Package has been setup in the **Administration > Account > Installed Packages** area for each Profile (The Administration area is available from the top right under the logged in username):

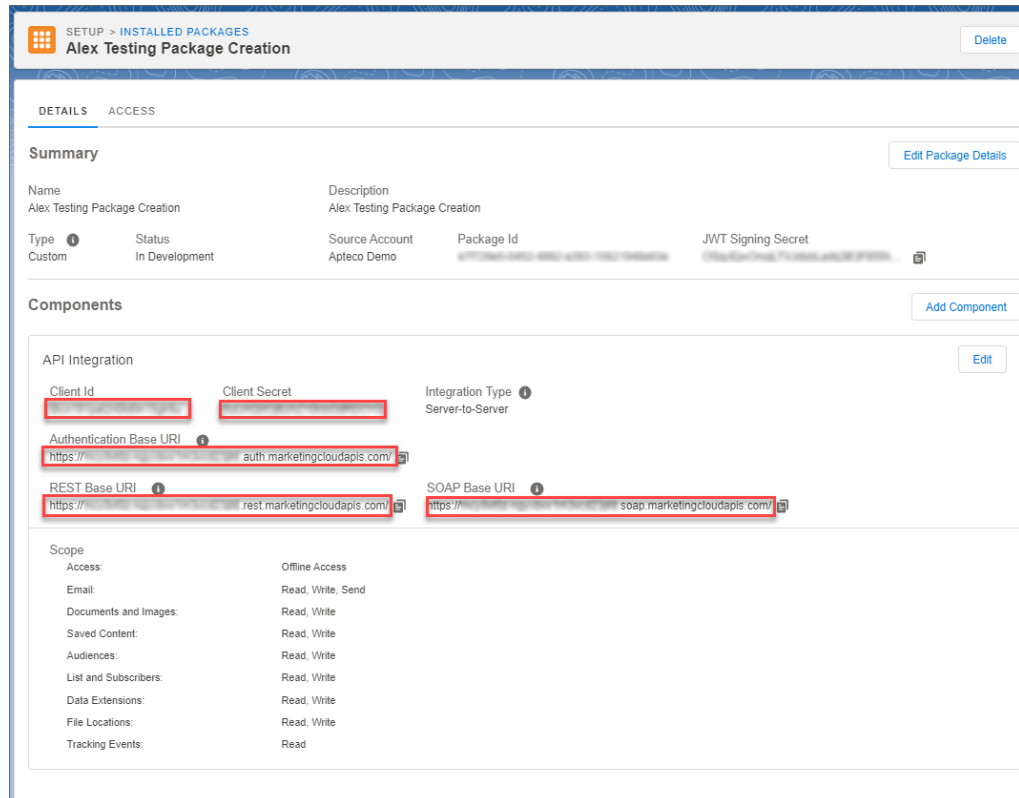
API Package Settings

During the setup make a note of the following

Table 8 –API Components

| Field | Description |
|-------------------------|--|
| | *Example, these will be specific to each sender profile and are used in FasStats when configuring the Email Broadcasting Template |
| Business Unit | Optional |
| Account Id | e.g. *12345678 used as the FTP Username and forms the first part of the FTP URL |
| Client Id | e.g. *g2yTgel9ighz118ps6cWnq3j a 24-character alphanumeric string |
| Client Secret | e.g. *h8yygelSighz118ps6cWaquj a 24-character alphanumeric string |
| FTP Password | e.g. *6Da.fp.4L emailed during setup and forms the second part of the FTP URL |
| API Version | All new accounts with Salesforce will be on v2, you can check if your existing API Package is a Legacy API v1 from Setup – Apps > Installed Packages |
| Authentication Base URI | [*]https://0f4wbzr4nlfsslwi2u612psbpg7g.rest.marketingcloudapis.com/ |
| Base URI | [*]https://0f4wbzr4nlfsslwi2u612psbpg7g.rest.marketingcloudapis.com/ |

Installed Packages page



Additional Settings

See the other areas in the Salesforce Marketing Cloud for additional settings

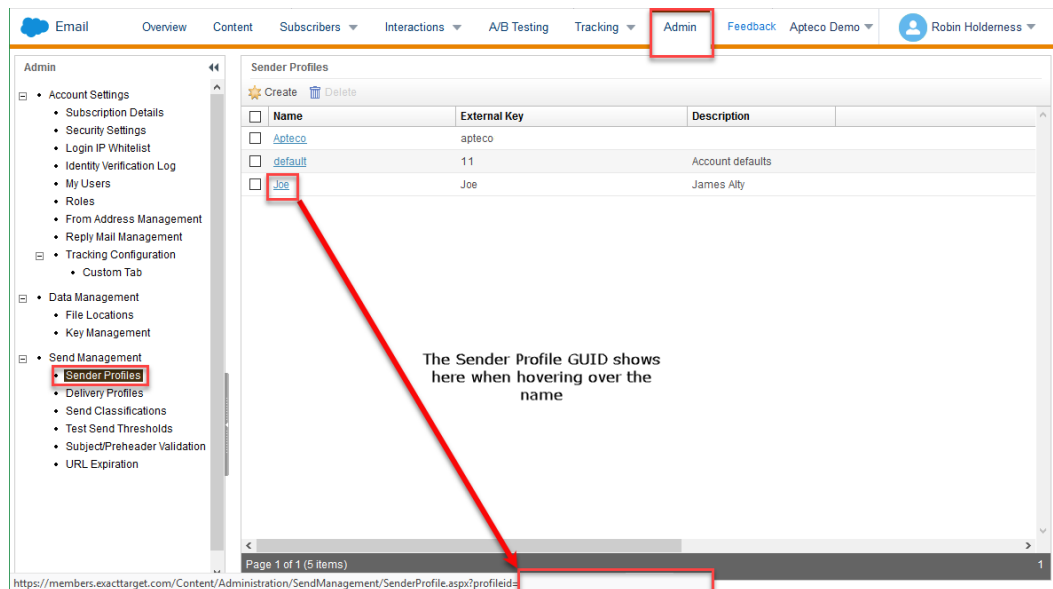
Table 9 –Other Settings

| Field | Description |
|------------------------|---|
| Sender Profile | GUID Hover over the name of the sender change to uppercase e.g. 24C54B21-3708-F123-A4E8-973AF123381B |
| File Transfer Location | From: Admin > File Locations |
| Send Classification | From: Admin > Send Classification |

Sender Profile

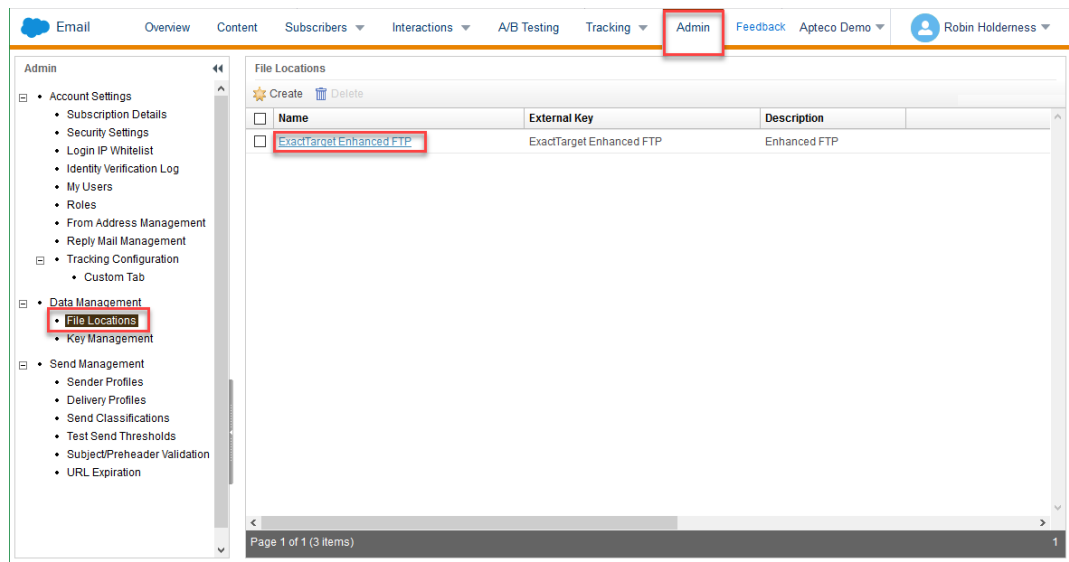
A GUID from the **Admin** menu sender Profiles (Note: This is a different area to Administration)

Hover over the name of the sender.



File Transfer Location

See the **Admin** menu **File Locations**



Send Classification

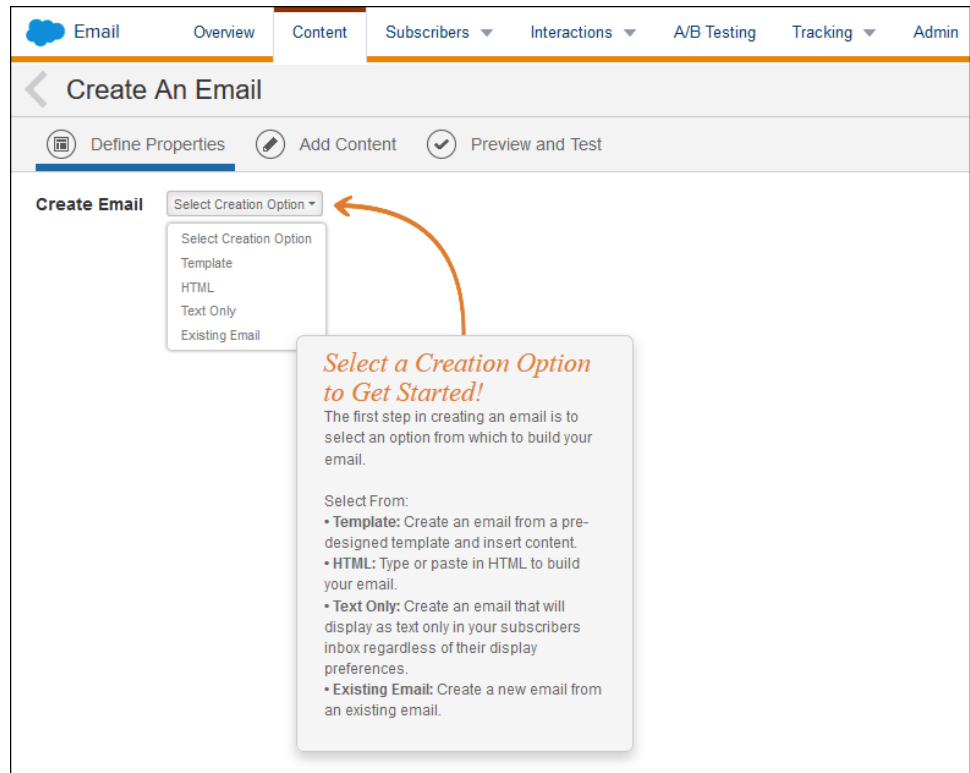
See the **Admin** menu **Send Classifications**

The screenshot displays the Salesforce Admin interface for Send Classifications. The top navigation bar includes 'Email', 'Overview', 'Content', 'Subscribers', 'Interactions', 'A/B Testing', 'Tracking', 'Admin', 'Feedback', 'Apteco Demo', and 'Robin Holderness'. The left sidebar shows the 'Admin' menu with 'Send Classifications' highlighted. The main content area shows a table with the following data:

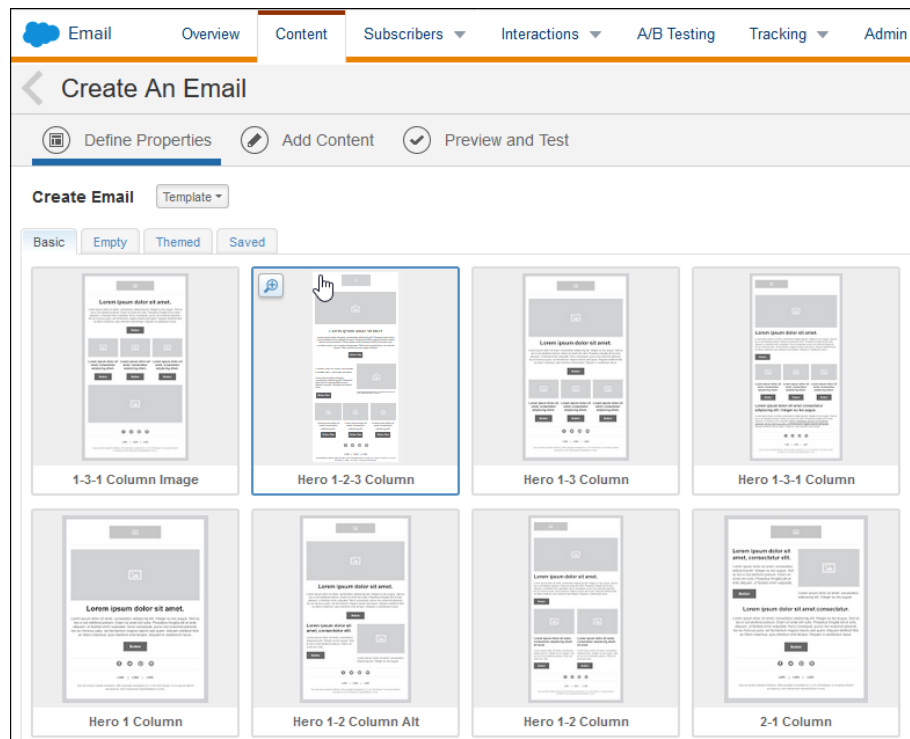
| Name | External Key | Description |
|-----------------------|--------------|---|
| Default Commercial | 12345 | Default Commercial Send Classification |
| Default Transactional | 12345 | Default Transactional Send Classification |

Set up Messages and Templates using Content Builder in Salesforce

1. From: *Content*



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



- Using the wizards, you can define the static/dynamic content and the style of the emails.

Assigning Roles to FastStats Users in Salesforce

- Log into Salesforce, Click the dropdown on the username on the right-hand side and choose Administration
- From the Account menu choose Users
- Put a tick next the user that is being used to authenticate
- Click Manage Roles

- Click Edit Roles

6. Ensure the following roles are assigned

The screenshot shows the Salesforce Administration console interface. At the top, there are navigation tabs: Administration, Account, Security, Applications, and Data Management. Below the tabs, the breadcrumb trail reads 'Users > Robin Prouse > Roles'. There are 'Save' and 'Cancel' buttons. The main section is titled 'Roles' and contains the instruction 'Assign the selected role(s) to the user.' followed by a list of roles with checkboxes. The following roles are checked:

- Grant the user access to the web services
- Administrative Data Management
- Manage Data Extension Data and Retention Policy

Table 10 – Broadcasting Roles

| Required | Role |
|----------|--|
| Y | Grant the user access to the web services |
| Y | Administrative Data Management |
| Y | Manage Data Extension and Retention Policy |

Appendix B: API Parameters

Table 11 – Email Response Gatherer Parameters

| Parameter | Required | Default | Description |
|-----------|----------|---------|--|
| FTPURL | Y | | The ftp location (including username and password) where your Salesforce responses are generated |

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

| | Required | Response Table field | Salesforce 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 | EmailAddress | 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 |
| MESSAGENAMECOLUMNNAME | N | | The message name is not returned in the Salesforce 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 the data downloaded to a specific type of response: <ul style="list-style-type: none"> • Open • Bounce • Click |
| BATCHCOLUMNNAME | N | BatchID | |
| BESPOKEEXTRACTFILENAME | N | | This needs to refer to the Extract Filename if downloading bespoke responses. |
| BESPOKEEXTRACTID | N | | This needs to refer to the Extract Id if downloading bespoke responses. |
| BUSINESSUNITID | | | If you are using Business Units in your account, you can enter a specific id to retrieve responses for that Business Unit or enter a * to retrieve all responses across all units. |
| RESPONDSTARTDATE | | | A specific date and time from when you wish to retrieve responses from in the format you specify (using DATEFORMAT). |
| RESPONSEENDDATE | | | A specific date and time to when you wish to retrieve responses to in the format you specify (using DATEFORMAT). |
| RESPONSEPERIOD | | | If RESPONSESTARTDATE or RESPONSEENDDATE are not used, this can be used to specify a period in days (D) or months (M) from the current date. |
| SUBSCRIBERIDCOLUMNNAME | | SubID | |

| Additional Configuration | Required | Default | Description |
|--|----------|-------------------------|---|
| DATEFORMAT | N | | Date format used e.g. dd.MM.yyyy HH:mm |
| DATEOFFSET | N | 0 | No Longer used, this parameter's function is preconfigured in the software using the SERVERTIMEZONE or LOCALTIMEZONE settings |
| LOCALTIMEZONE | N | Local | Specifies the time zone to store your dates in. This allows you to write responses in your current time zone. |
| SERVERTIMEZONE | N | GMT Standard Time | Specify the time zone that your broadcaster uses when returning data. This allows you to write responses in your current time zone. This value is pre configured for each broadcaster, options are Local, Central Standard Time, W. European Standard Time, UTC, GMT Standard Time, see the link below. |
| See: https://support.microsoft.com/en-gb/help/973627/microsoft-time-zone-index-values | | | |
| MAXRECORDSPERBATCH | N | | Entering a numeric value will split the bulk insert of responses up into smaller batches. If this parameter is not set, all responses will be bulk inserted in one go. |
| 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 | Allows you to specify a pipe () delimited list of the additional fields you wish to include in the Response Details table. This only acts as a filter, i.e. you can only specify fields that are included in the extract file. |
| 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. |
| EXECUTIONBUFFER | N | | Adds a buffer in minutes to the start of the response window. Use this to create an overlap to allow for delayed response notifications. |
| EXECUTIONTAG | N | | When using Smart Execution, this can be used to identify separate accounts when using the same broadcaster. |
| FILETRANSFERLOCATION | N | ExactTarget FTP Export. | This should refer to the file location from your ExactTarget admin section. |
| TRACKINGEXTRACTFILENAME | | | This needs to refer to the Tracking Extract Filename as provided by ExactTarget (this is only required if you need to collect Communication Keys). |
| TRACKINGEXTRACTID | | | This needs to refer to the Tracking Extract Id as provided by ExactTarget (this is only required if you need to collect Communication Keys). |

| Parameter | Required Y/N | Default | Description |
|-----------------------------------|--------------|---|--|
| MESSAGESTARTDATE | N | | A specific date and time from when you wish to retrieve message names for the lookup in the format you specify (using yyyy-MM-dd HH:mm:ss). |
| MESSAGEENDDATE | N | | A specific date and time to when you wish to retrieve message names for the lookup in the format you specify (using yyyy-MM-dd HH:mm:ss). |
| MESSAGEPERIOD | N | | If MESSAGESTARTDATE or MESSAGEENDDATE are not used, this can be used to specify a period in days (D) or months (M) from the current date to retrieve message names for the lookup. |
| JOBIDCOLUMNNAME | N | JobID | . |
| QUERYALLACCOUNTS | | | The default value of true queries all accounts when retrieving message and list names. The information gathered is used to lookup the actual message and list names. |
| TREATMESSAGENAMEASADDITIONALFIELD | | false | Setting this to true will force the raw response type to be written to the ReponseDetails table, before any conversion is carried out. |
| TREATTYPEASADDITIONALFIELD | | false | Setting this to true will force the raw response type to be written to the ReponseDetails table, before any conversion is carried out. |
| TYPECOLUMNNAME | | | TREATMESSAGENAMEASADDITIONALFIELD |
| URL | | https://websevice.exacttarget.com/52er vice.asmx . | This should refer to the web service on the server your ExactTarget account is hosted on. |

Table 12 – Email Broadcasting Parameters

| Parameter | Required Y/N | Default | Description |
|-----------------------------|--------------|---|---|
| FTPURL | Y | | e.g. ftp1.exacttarget.com Note: This may be a different URL depending on which salesforce WDSL service used |
| API Version | Y | | All new accounts with Salesforce will be on v2, you can check if your existing API Package is a Legacy API v1 from Setup – Apps > Installed Packages |
| Authentication Base URI | (Y v2) | | [*] https://0f4wbzr4nlfsslwi2u612psbpg7g.rest.marketingcloudapis.com/ |
| Base URI | (Y v2) | | [*] https://0f4wbzr4nlfsslwi2u612psbpg7g.rest.marketingcloudapis.com/ |
| Send Classification | Y | | e.g. Default Commercial |
| FTP Username | Y | | Obtain this from Salesforce |
| FTP Password | Y | | Obtain this from Salesforce |
| URL (API URL) | | https://webservice.exacttarget.com/Service.asmx . | https://developer.salesforce.com/docs/atlas.en-us.mc-apis/meta/mc-apis/your-subdomain-tenant-specific-endpoints.htm |
| *Client ID | Y | | Available from Salesforce - Administration > Account > Installed Packages |
| *Client Secret | Y | | Available from Salesforce - Administration > Account > Installed Packages |
| Email Content | Y | | Classic Builder, Content Builder or Both, Set to match the builder used in Salesforce to create the Message |
| Sender Profile | Y | e.g. 24C54B21-3708-F123-A4E8-973AF123381B | A GUID obtained from the Marketing Cloud Admin > Sender Profiles Mouse over the Sender Profile Initials to see the globally unique identifier (GUID) at the bottom of the window, change to uppercase |
| Use Urn as Subscriber Key | Y | true | |
| FTP Protocol | Y | FTP | |
| Subscriber Key Name | Y | Subscriber Key | |
| File Transfer Location | Y | ExactTarget Enhanced FTP | We recommend you use ExactTarget Enhanced FTP |
| Upload and Broadcast Folder | Y | e.g. Root\%LISTNAME%\%MESSAGENAME% | These can be absolute paths to the Data Extensions folder, or you can use the following parameters |
| Upload Only Folder | Y | | |
| UploadEmptyLists | N | true | Set this to false if you wish to prevent empty list being uploaded to Salesforce |
| UseDatedList | N | true | Setting this to false will remove the date and time stamp at the end of the file name |

| | | | |
|-----------------|---|--------------------|---|
| DatedListFormat | N | yyyMMdd-HHmms | 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 |

Appendix C: Example Batch File

Example batch file to use with FERG and scheduling

```

@echo off

REM *****

REM File Name: SalesforceBatchFile.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\Salesforce.txt"
SET LOGFILEDETAILS="Logs\Salesforce_Details.txt"

echo. >> %LOGFILE%

echo. >> %LOGFILEDETAILS%

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

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

echo. >> %LOGFILE%

>> %LOGFILEDETAILS%

echo.

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

```
goto Complete
```

```
:FailedLogin
```

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

```
goto Complete
```

```
:FailedDownload
```

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

```
goto Complete
```

```
:FailedLogout
```

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

```
goto Complete
```

```
:FailedException
```

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

```
goto Complete
```

```
:Complete
```

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

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

```
%FERG% Salesforce.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.

Apteco GmbH

Kaiserstraße 35
60329 Frankfurt am Main
Germany
T: +49 (0) 69 25 66 97 0 – 0
support@apteco.de
www.apteco.de

Apteco Australia Pty Ltd

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

Apteco Benelux

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

Head Office

Apteco UK

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

T: +44 (0) 1926 407565
E: support@apteco.com
W: www.apteco.com

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