



Apteco

# Technical Guide

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

Dotdigital Integration Guide  
D060T3X002– May 2019

## **Revision Tracking Sheet**

This manual may be revised periodically to incorporate new or updated information.

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### **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.

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Listed below is the revision date of each page (if applicable):

### **PageRevision**

All pages updated May 2019

# Contents

- 1 Introduction ..... 1**
  - 1.1 Summary of Dotdigital functionality..... 1
  - 1.2 Before You Begin..... 2
- 2 Process Summary ..... 3**
  - 2.1 Architecture ..... 3
- 3 Apteco System Configuration ..... 5**
  - 3.1 Creating the Response Database..... 5
  - 3.2 Linking the Response Database to the FastStats Service..... 9
  - 3.3 Installing the Email Response Gatherer ..... 11
  - 3.4 Creating the Response Gatherer Folders ..... 14
  - 3.5 Creating the Configuration File ..... 15
  - 3.6 Scheduling the Response Gatherer ..... 17
- 4 FastStats Broadcasting & Responses..... 20**
  - 4.1 Enable Email Broadcasting.....20
  - 4.2 Configuration in FastStats.....22
  - 4.3 Adding a Predefined Broadcasting Field Set .....25
  - 4.4 Checking your configuration.....28
  - 4.5 Email Responses Wizard .....31
- 5 PeopleStage Broadcasting & Responses..... 35**
  - 5.1 Defining the Broadcast Channel in PeopleStage.....35
  - 5.2 Broadcasting in PeopleStage.....40
- Appendix A: Dotdigital Configuration..... 41**
- Appendix B: API Parameters ..... 44**
- Appendix C: Example Batch File ..... 46**
- Appendix D: Troubleshooting ..... 48**



# 1 Introduction

This integration guide details the processes required to integrate the Apteco Marketing Suite with the Dotdigital 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

Export and upload only for the broadcast to be scheduled by the ESP.

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### Note:

Apteco approves this integration with Dotdigital. Use of the Apteco Marketing Suite in combination with Dotdigital software through this integration will not affect the intellectual property rights indemnity provided in the Apteco Marketing Suite "End User Licence Agreement".

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### Note:

At the time of writing this guide DotMailer was the name used in the Apteco marketing Suite, development is underway to rename to Dotdigital.

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## 1.1 Summary of Dotdigital functionality

### Technology

Dotdigital integrates with your FastStats system by utilising a RESTful transport over HTTP/S.

### Supported Integrations

Dotdigital supports all the above integration options.

### Type of Integration - Predefined

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

## 1.2 Before You Begin

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

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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 Dotdigital
  - b. API Parameters

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

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### 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=<username>;Password=<password>;`
  - 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
- 

### Important:

You must be a user (a member in the Dotdigital team) to use Dotdigital

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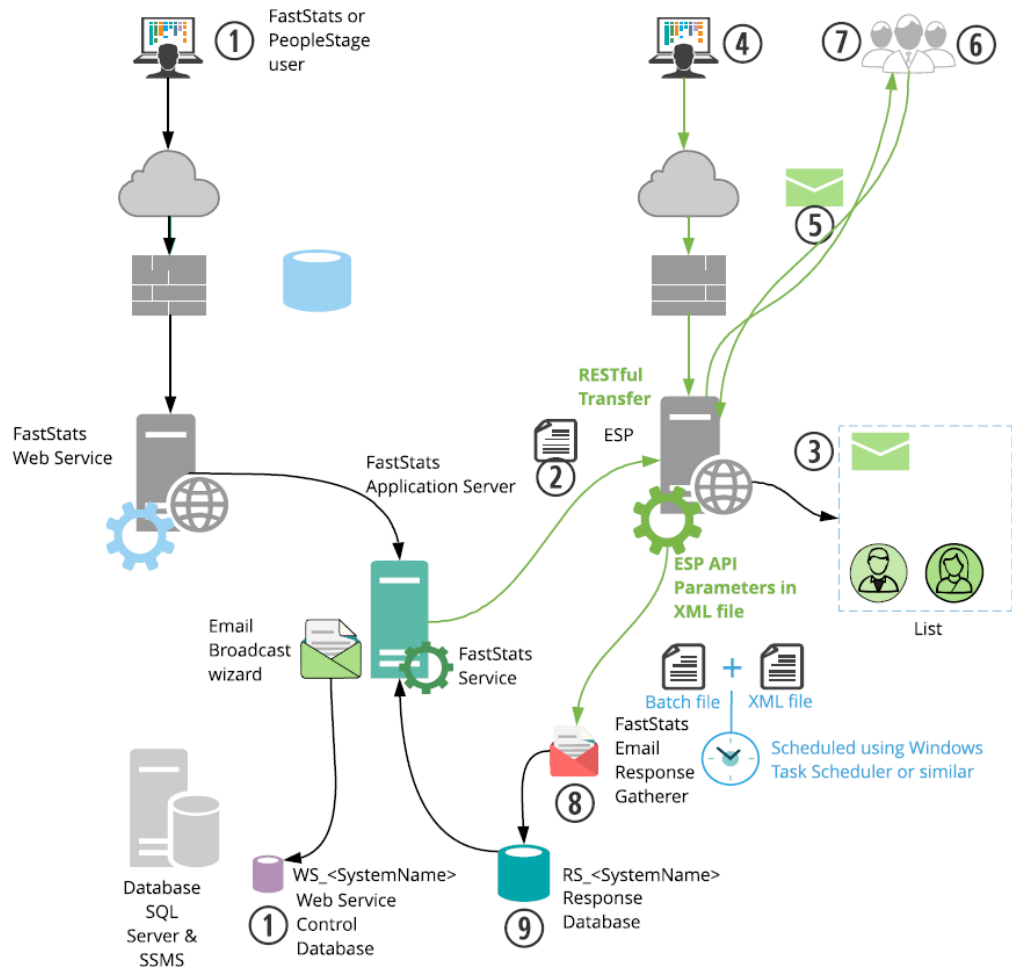
- The Username and Password for your Dotdigital Control Panel and the API Username and Password
- The Dotdigital Campaign and Address Book name

# 2 Process Summary

## 2.1 Architecture

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

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



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 Dotdigital via RESTful communication.
3. Dotdigital 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 Dotdigital web interface.
5. Dotdigital sends Messages to all recipients on the list.
6. Dotdigital records any undelivered messages.
7. Dotdigital records a response for each interaction with a message (for example opens and clicks).





# 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.

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**Note:**

If PeopleStage has been installed this step can be omitted as the RS\_<SystemName> database will have been created. Continue from **Chapter 3.3**

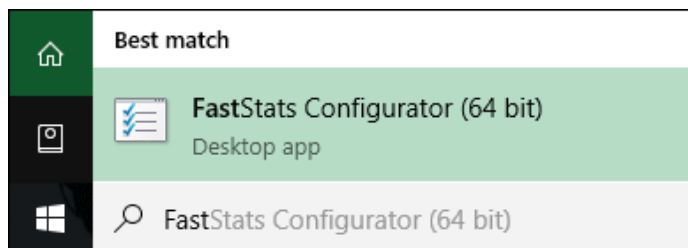
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1. Open the FastStats Configurator.

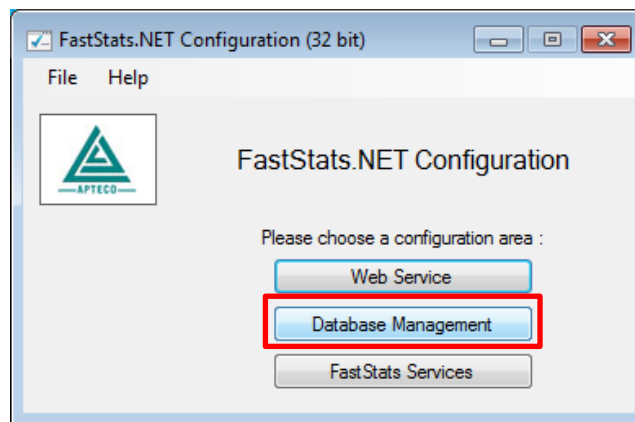
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**Tip:**

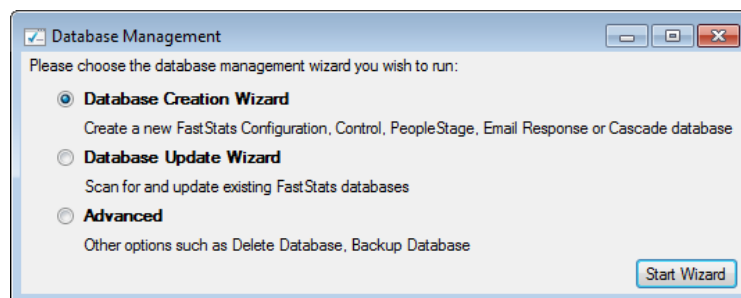
Search for Fast in the Start Menu



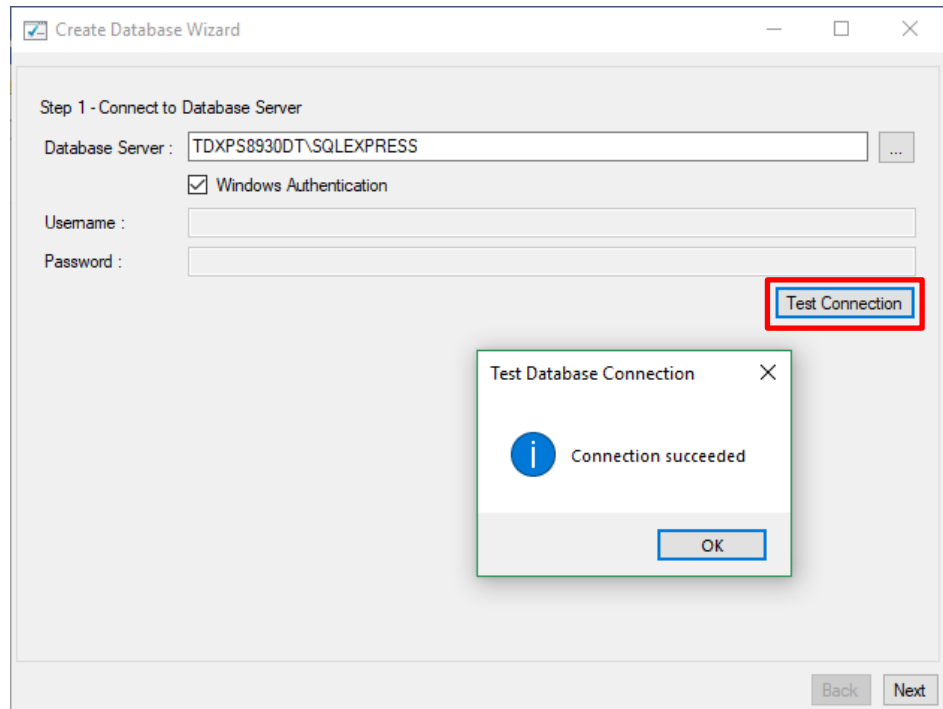
2. Select **Database Management**.



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



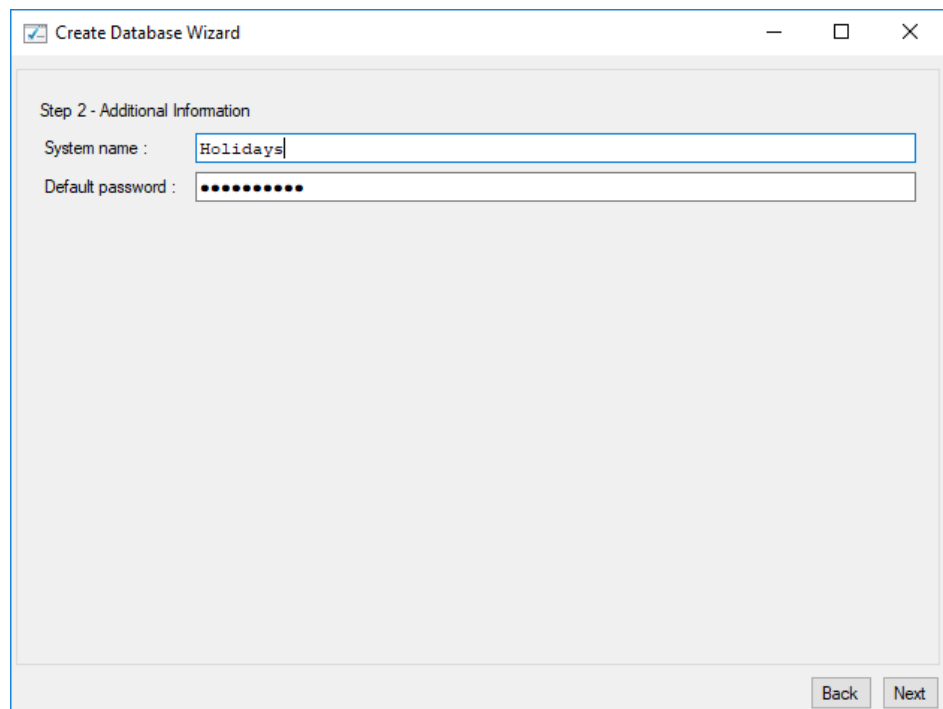
4. Enter the name of the **Database Server** where you wish to store the response database, click **Test Connection**



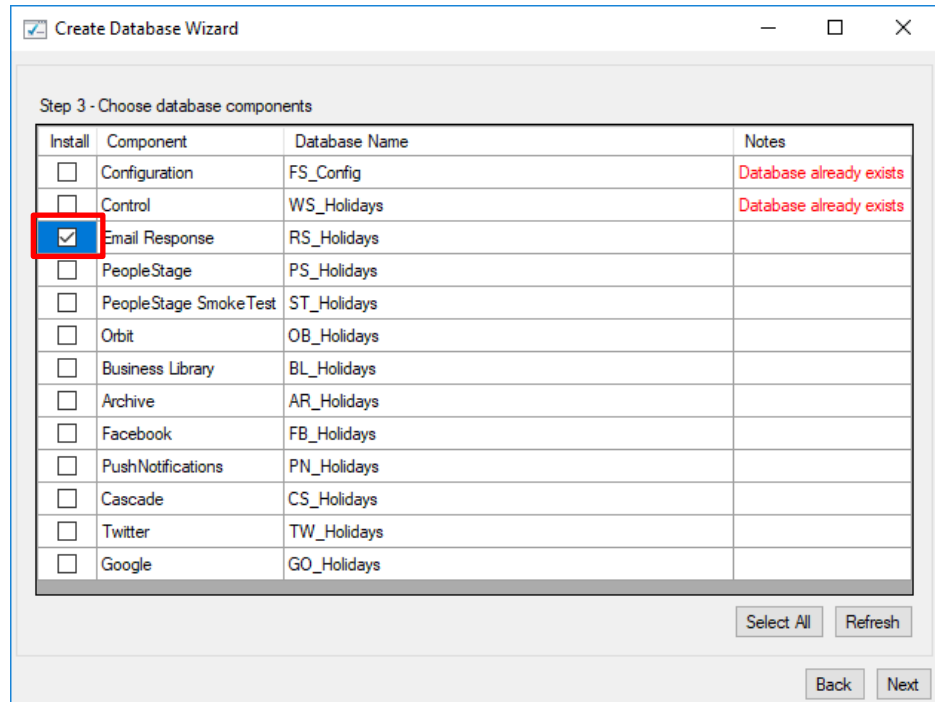
**Note:**

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.



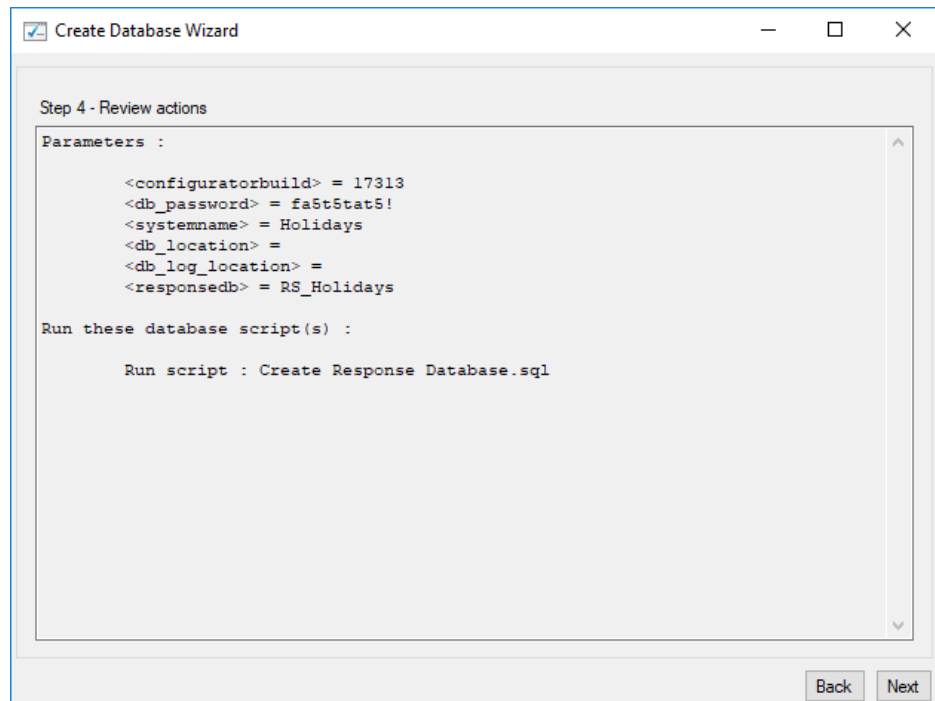
6. Select the **Email Response** check box, then click **Next**.



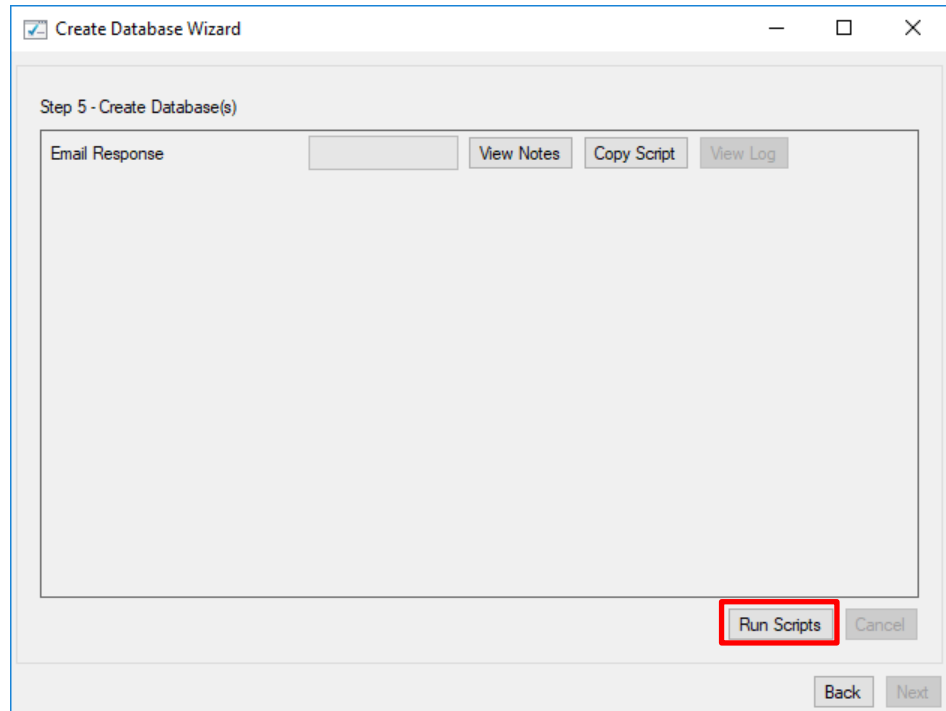
**Note:**

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.

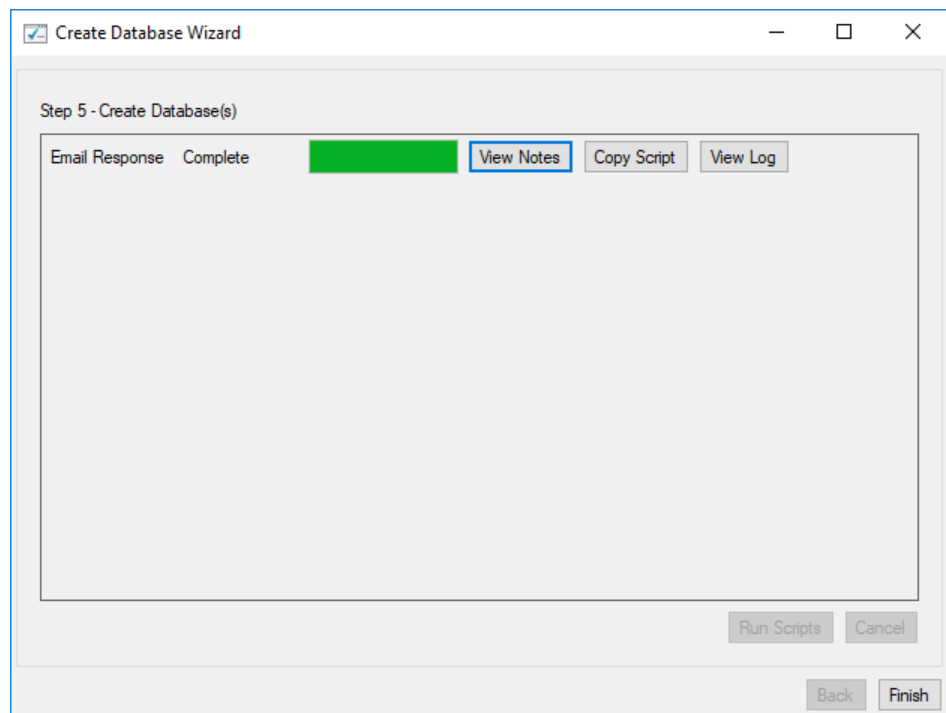
7. Click **Next** on the Review actions step.



8. Click **Run Scripts**.



9. Click **Finish**.



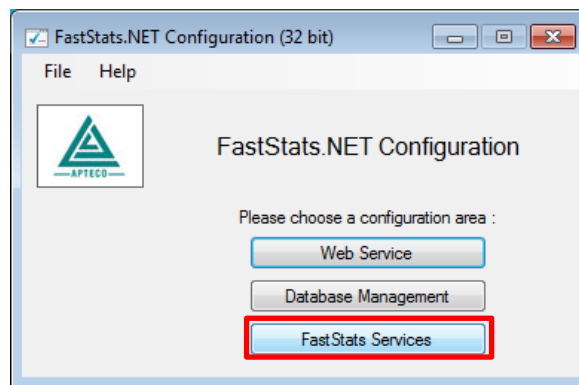
## 3.2 Linking the Response Database to the FastStats Service

You need link the response database to the FastStats service.

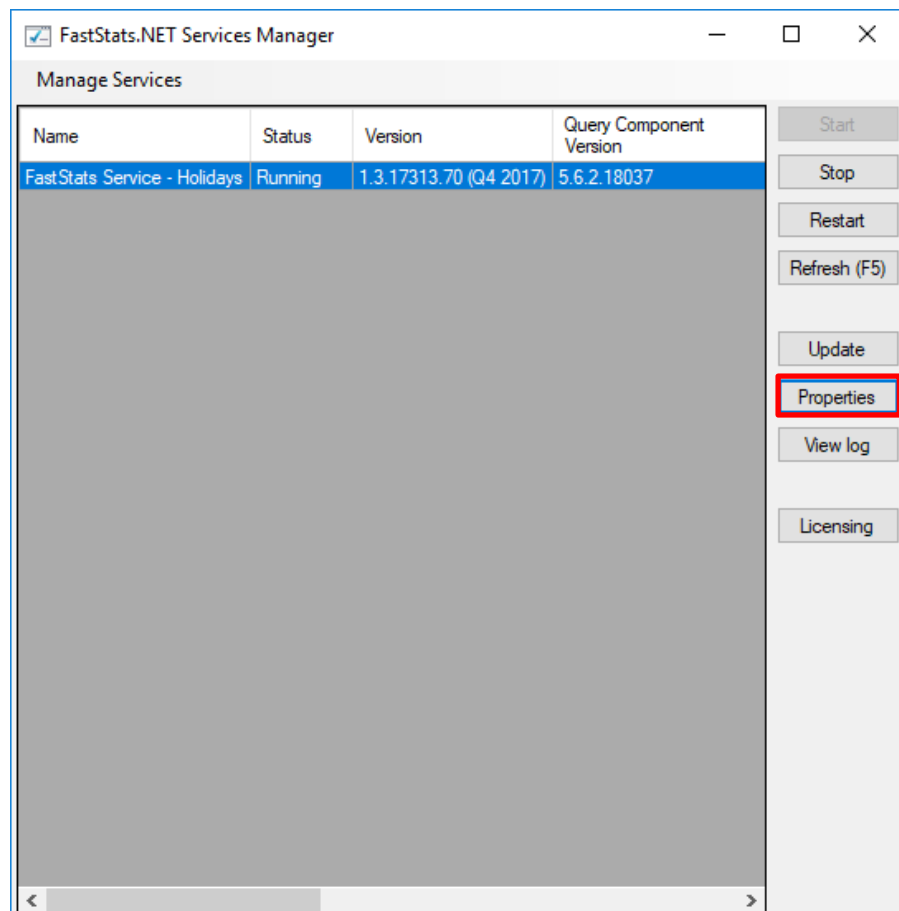
**Note:**

If PeopleStage has been installed this step can be omitted as the RS\_<SystemName> database will have been created. Continue from **Chapter 3.3**

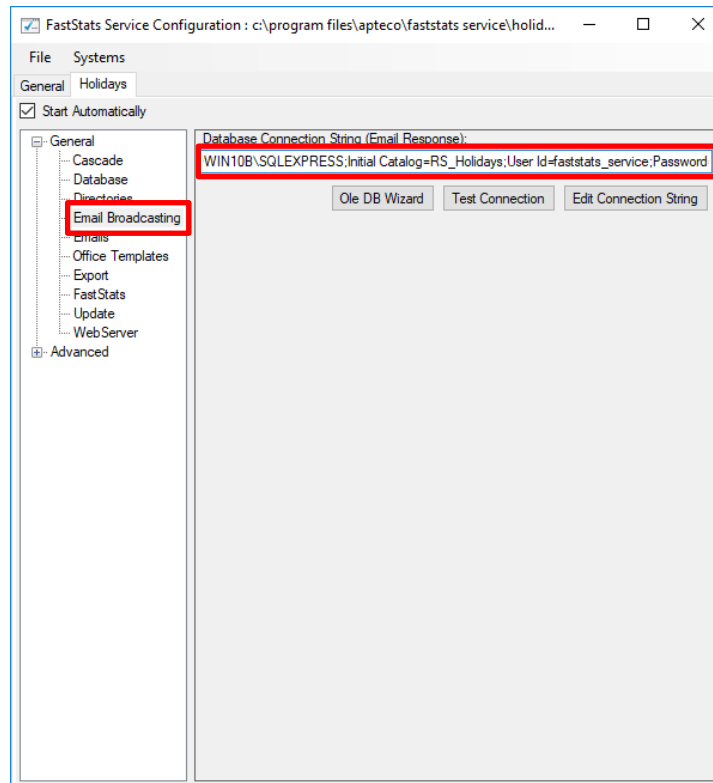
1. Open the **FastStats Configurator**
2. Select **FastStats Services**



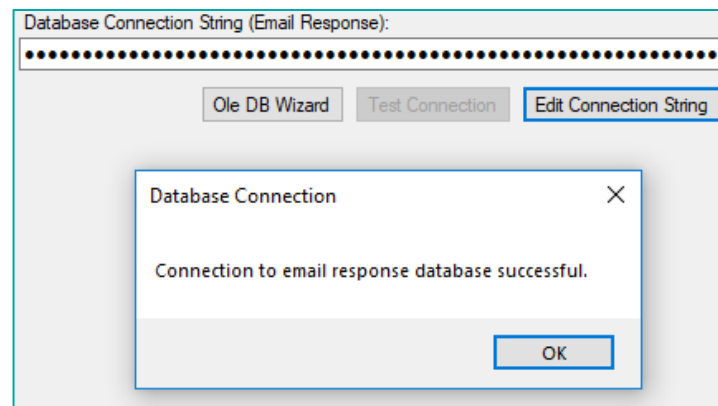
3. Select the **FastStats Service** for the system to link to the response database, click **Properties**



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

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**General Considerations:**

For broadcasts to work correctly you will need to ensure that the FastStats server has access to the relevant Dotmailer servers through port 80, for the URLs:

- api.dotmailer.com

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**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.

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## 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.

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**Digital Integration.zip available from:**

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

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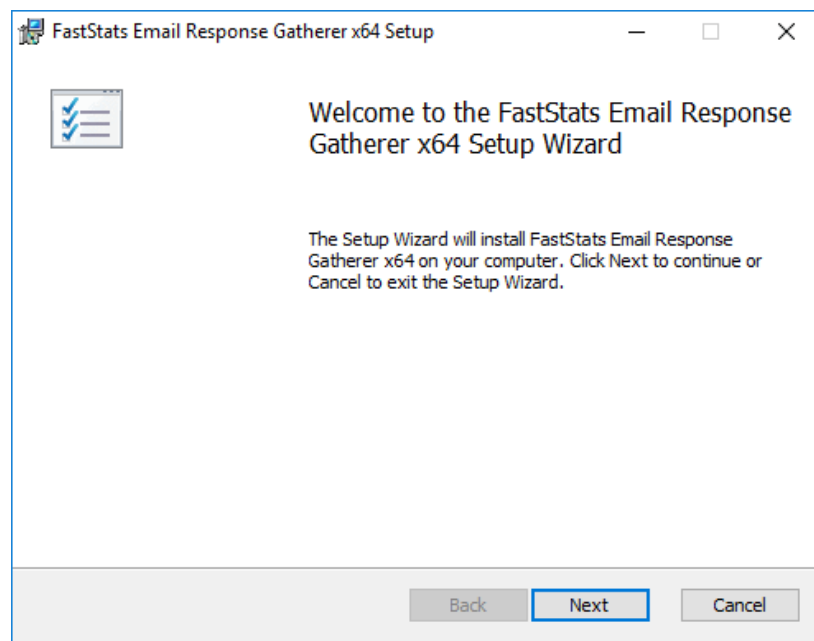
**Note:**

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

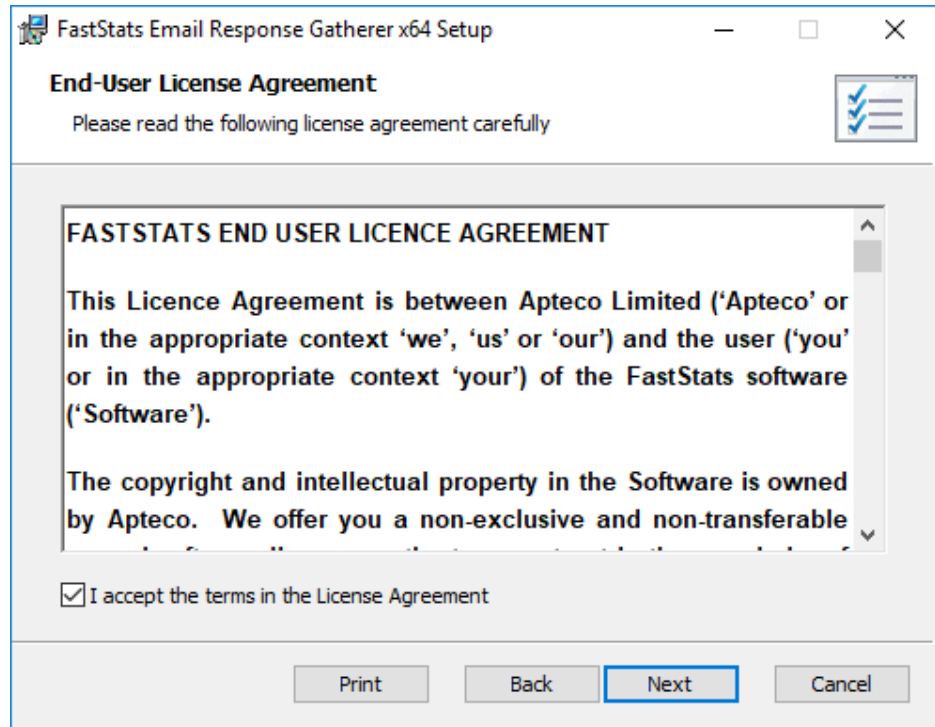
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Open the **EmailResponseGatherer64Setup.msi** from the DigitalIntegration\EmailResponseGatherer folder.

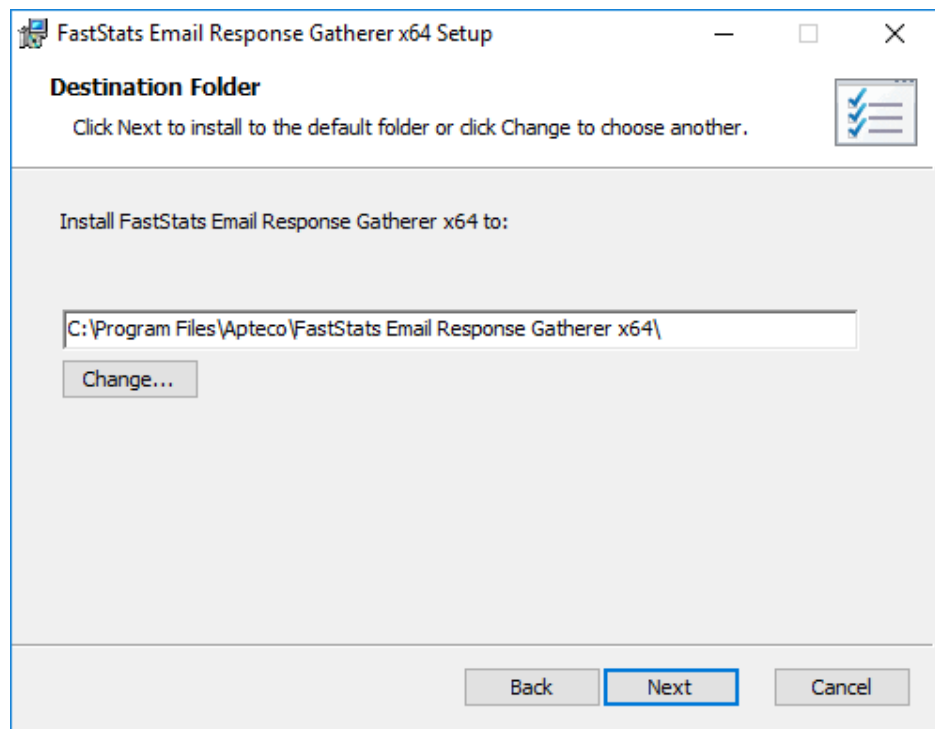
1. Click **Next**.



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**

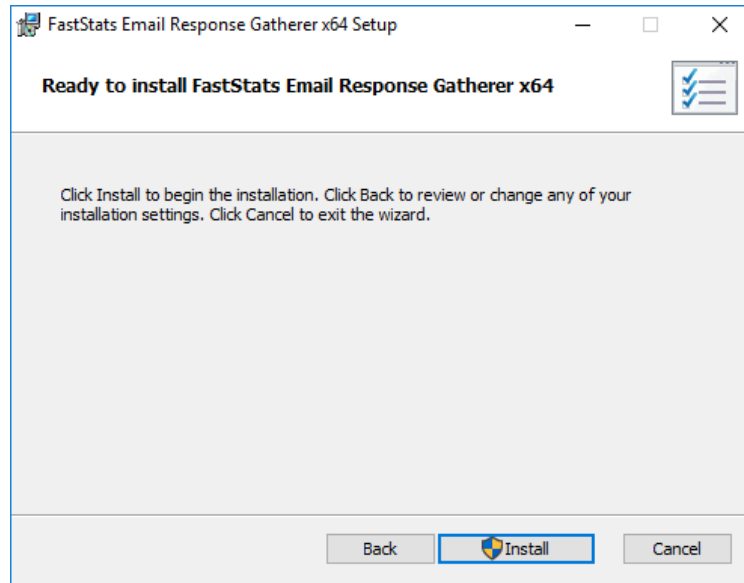


**Note:**

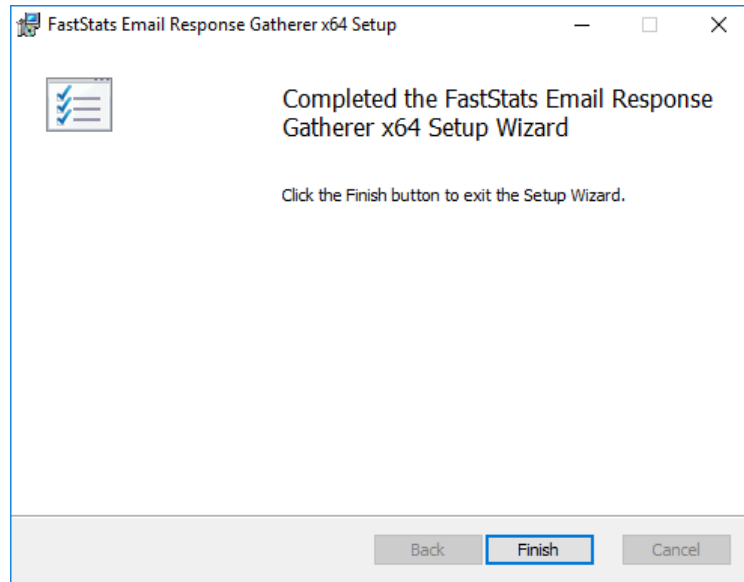
The default directory for this is **C:\Program Files\Apteco\FastStats Email Response Gatherer x64** but may be different, we recommended that you install this in your FastStats application files directory on the FastStats Application Server.



4. Click **Install** to start the installation



5. Once the installation has completed, click **Finish**



## 3.4 Creating the Response Gatherer Folders

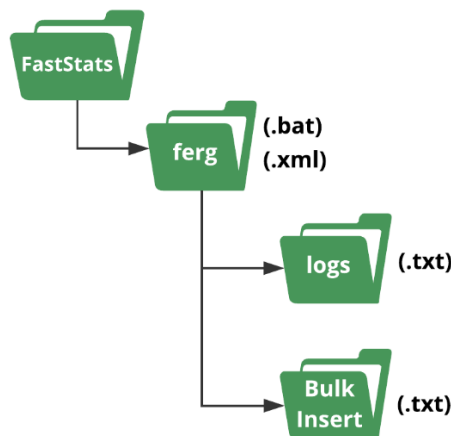
You will need to create folders to store the files to use with the Response Gatherer; these will include the following types of files.

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 inside the existing FastStats directory.




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**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.

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## 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 Dotdigital from the Broadcaster drop-down list
3. Enter the **Username** and **Password** to use with the Dotdigital API
4. Use **Add** to add all the required parameters for the Broadcaster
5. Use the **File** menu to save the XML file to the batch and XML file folder

FastStats Email Response Gatherer

File Help

Database

Connection string : Data Source=TDXPS8930DT\SQLExpress;Initial Catalog=RS\_ Edit

Timeout (secs) : 0 Test

Bulk insert folder : \\ServerName\FastStats\FERG\Bulk Insert Browse

Send Email on Error SMTP Properties

PeopleStage connection string : Edit

Email Broadcaster

Broadcaster : DotMailer

Username : username

Password : password

Broadcast Parameters

Add

Parameter	Value
▶*	

**Note:**

Dotdigital is a Predefined Broadcaster, you can use the other fields if you need to customize the collection.

Table 2 – EmailResponseConfig Parameters

Dialogue Item	Settings to use
Connection String	The connection string to the response database for your system
Timeout (secs)	The timeout (in seconds) for the connection and query steps, the default is 1200 seconds
Bulk insert folder	The location to store the results to optimise 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 Dotdigital

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.

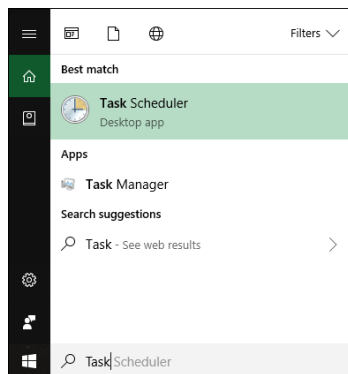
### Using Task Scheduler

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

1. Open Windows **Task Scheduler**

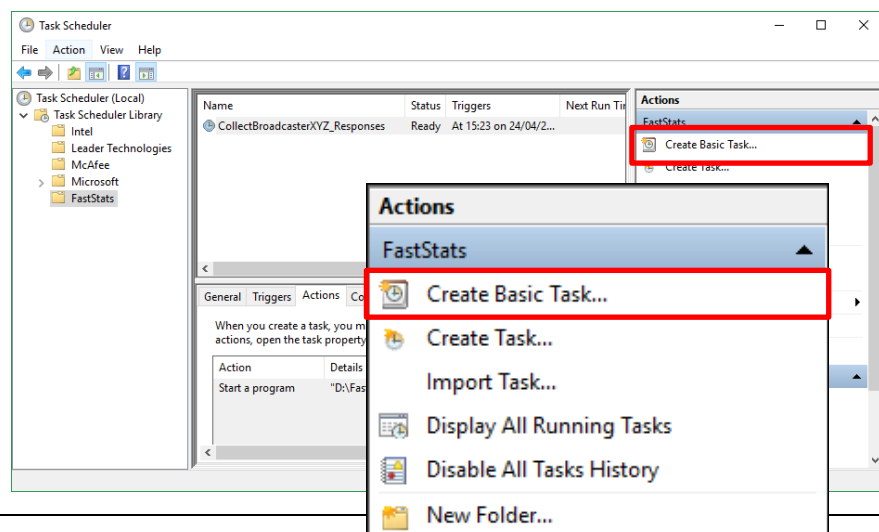
#### Tip

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, there is a text box for 'Name' containing 'CollectBroadcasterXYZ\_Responses' and a larger text area for 'Description' containing 'Scheduled Response Collection for XYZ'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a blue border.

### 4. Task Trigger step

#### a. Select the **Trigger** interval

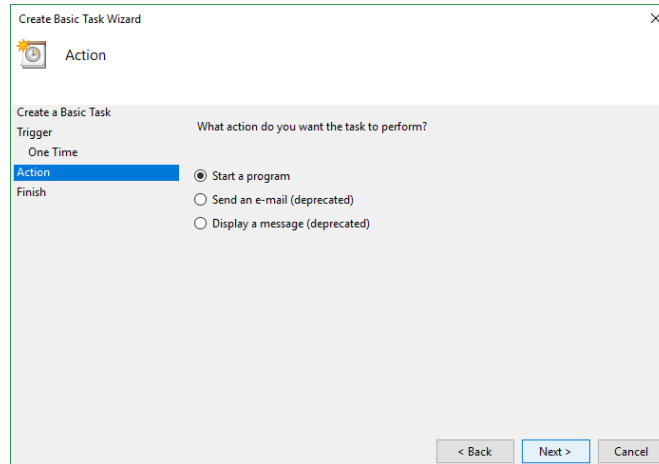
The screenshot shows the 'Create Basic Task Wizard' dialog box. The title bar reads 'Create Basic Task Wizard'. The main heading is 'Task Trigger'. Below this, there is a navigation pane with 'Task Trigger' selected. To the right, there is a section titled 'When do you want the task to start?' with several 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'. The 'Next >' button is highlighted with a blue border.

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

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

5. **Action** step

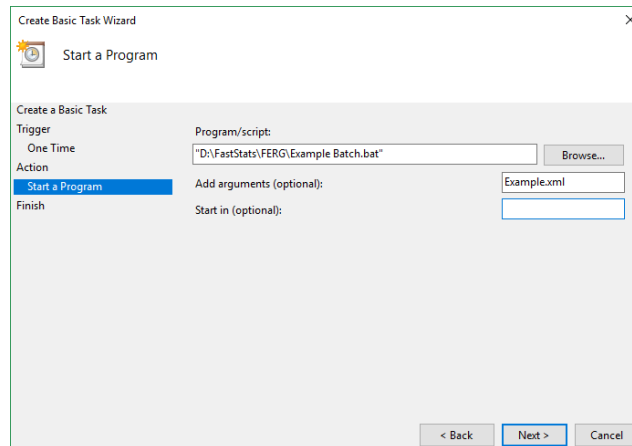
- a. Select **Start a program** and click **Next**



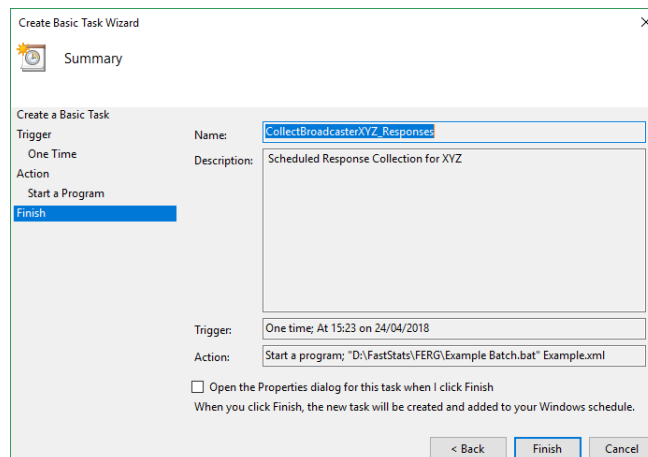
6. **Start a Program** Step

- 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:**

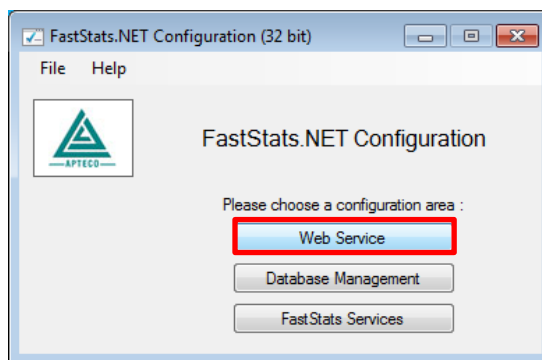
You must log in as an administrator to perform the following task.

The Email Broadcasting Wizard is required for FastStats use only.

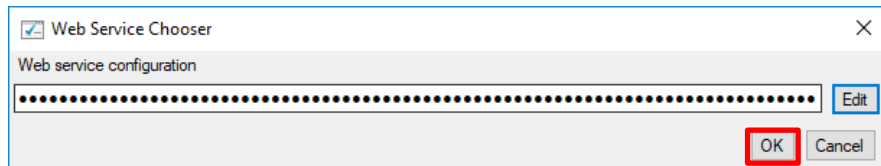
## 4.1 Enable Email Broadcasting

You must enable the Email Broadcasting wizard plugin.

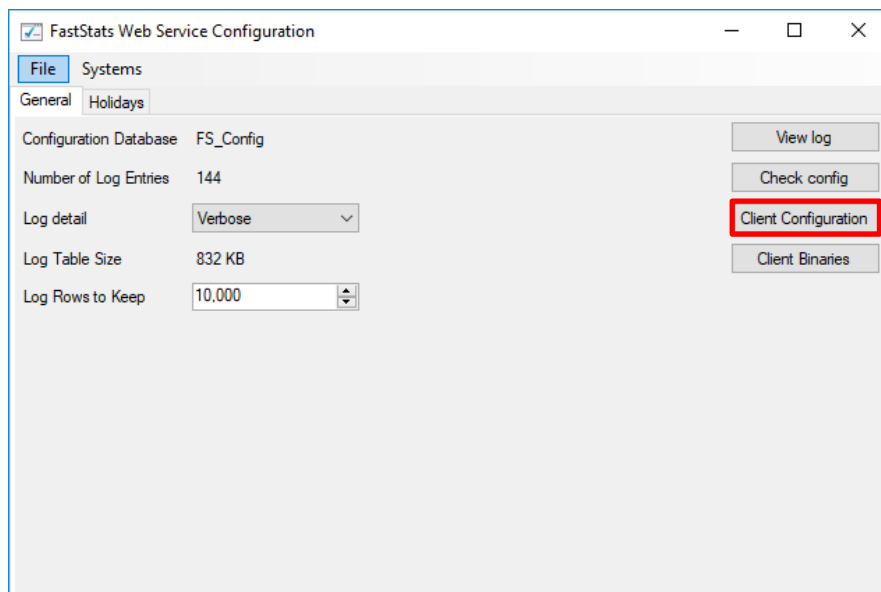
1. Open the **FastStats Configurator**
2. Select **Web Service**



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

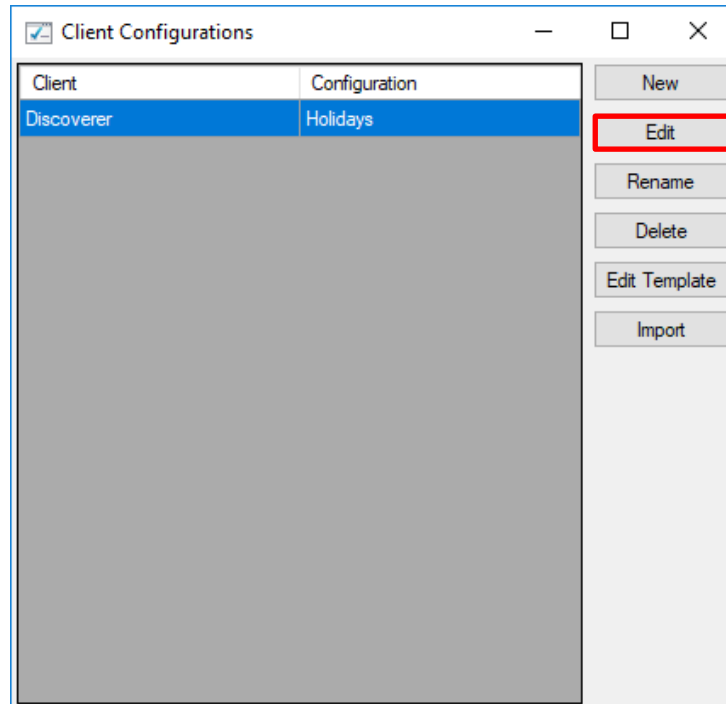


4. Click **Client Configuration**

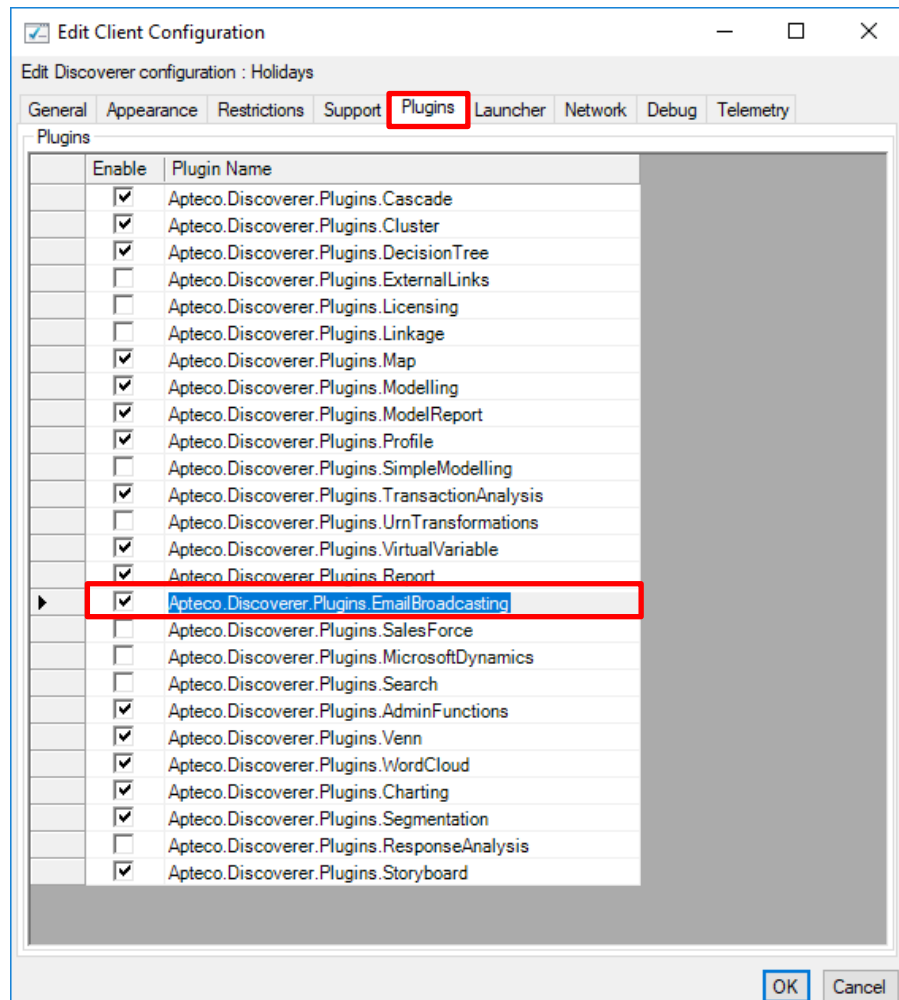




- Select the Discoverer client associated with your system and click **Edit**

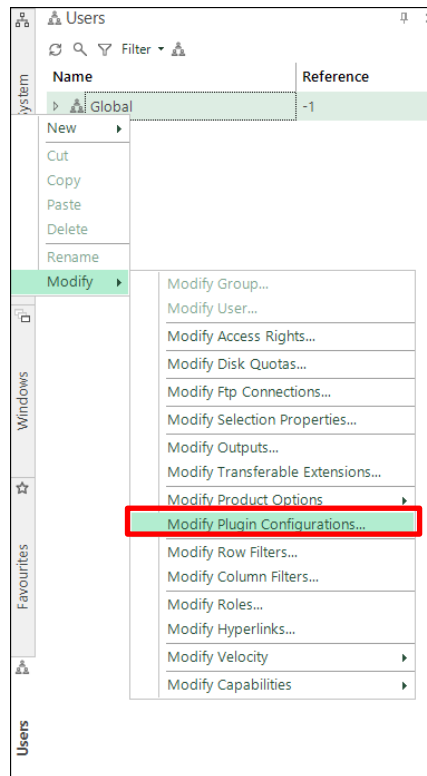


- On the Plugins tab ensure the **Apteco.Discoverer.Plugins.EmailBroadcasting** check box is selected then click **OK**

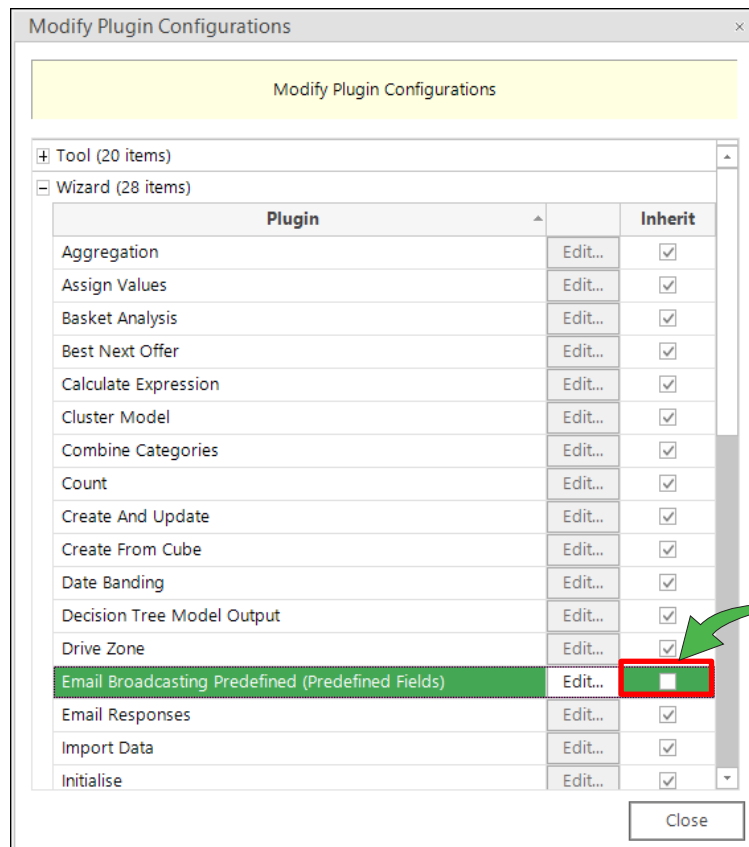


## 4.2 Configuration in FastStats

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



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



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

**Email Broadcasting**

Name:   Visible In Toolbox

Tooltip Text:

Image Path:

Group:  Order Within Group:

Group Order:

Name

Templates

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

**Edit Template**

Name:

Resolve Table:

Broadcaster:

Known Parameters:

Api Host:

Dm Timeout:

Page Size:

Additional Parameters:

Key	Value
*	

Parameters:

**Note:**

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

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

Table 3 – Edit Template Known Parameters Settings

Parameter	Settings to use
Api Host	https://api.dotmailer.com/v2/*
Dm Timeout	300
Page Size	1000
Address Book	
Segment Field Name	
Use Dated List	True (check-box selected)
Dated List Format	yyyyMMdd-HHmms
File Mapping	A list of pipe delimited fields (these headings will overwrite any defined in your output sequence). e.g. Urn FirstName LastName Company Email Message Discount*
Email Field Name	Email
Urn Field Name	URN
Communication Key Field Name	Communication_Key
Add New Fields	False (check-box cleared)
Maximum Wait Time	7200
Encoding	Default

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**Note:**

\*These settings will be specific to your Dotdigital account.

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**Note:**

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

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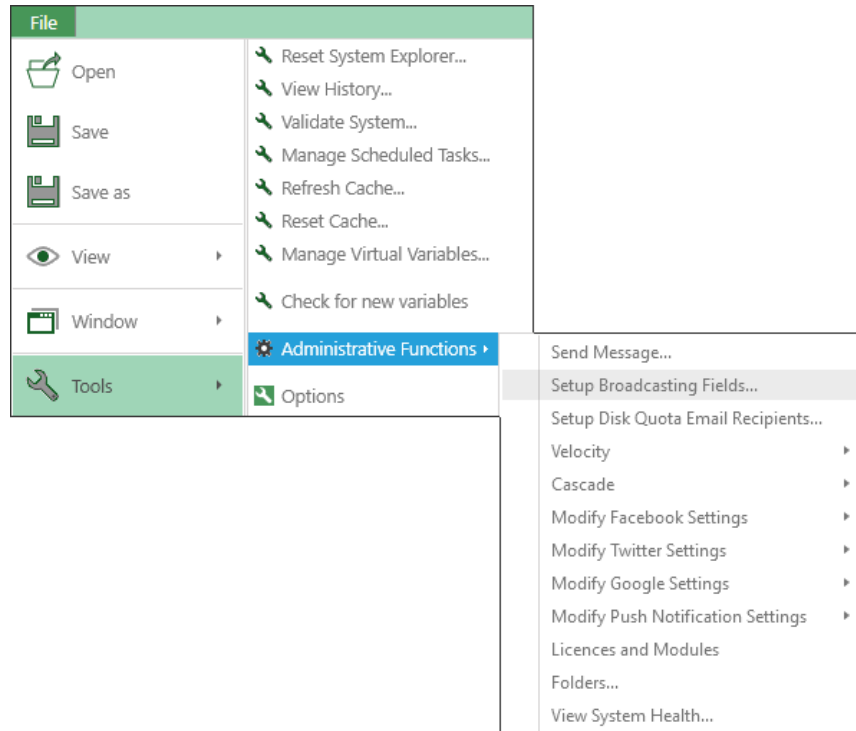
## 4.3 Adding a Predefined Broadcasting Field Set

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

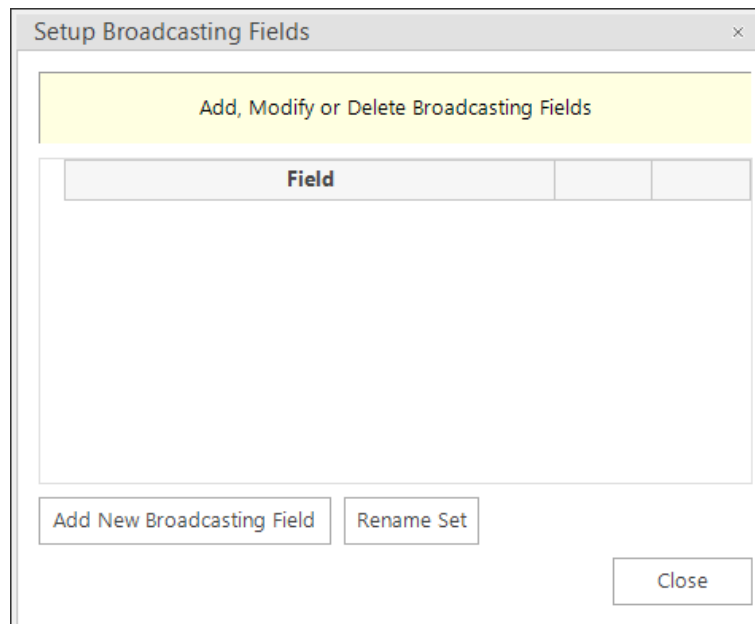
**Note:**

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

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



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



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

**Add Broadcasting Field**

Set Name:

Variable:

Header (optional):

Output Style:  ▾

Output Unclassified as Spaces

Email Field

SMS Field

Sequence Id:

**Note:**

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

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

Table 4 – Predefined Broadcaster Output Sequence Fields

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

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

**Add Broadcasting Field** ✕

Set Name:

Variable:

Header (optional):

Output Style:  ▾

Output Unclassified as Spaces

Email Field

SMS Field

Sequence Id:

**Note:**

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

**Setup Broadcasting Fields** ✕

Add, Modify or Delete Broadcasting Fields

⊕ Set Name : Adestra (3 items)

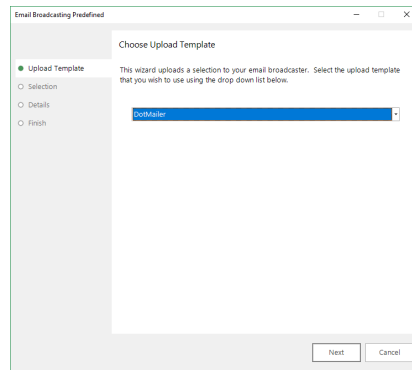
⊖ Set Name : Dotmailer (5 items)

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

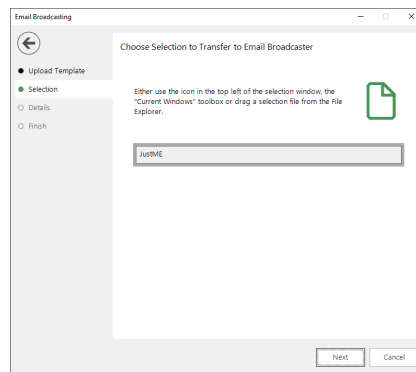
## 4.4 Checking your configuration

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

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



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



### Tip:

#### Email Broadcasting Details Form

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

A screenshot of the 'Email Broadcasting Details' form. The form title is 'Email Broadcasting Details'. Below the title is the text: 'Please enter your credentials for uploading your records to the broadcaster.' There are three input fields: 'Username' with the value 'apteco', 'Password' with masked characters '\*\*\*\*\*', and 'List Name' which is empty. Below the 'List Name' field is a search icon and a dropdown arrow. A list of available lists is shown below the dropdown, including 'FERGE Test Follow Up List\_2018072', 'FERGE Test Initial List\_20180726-11', 'FERGE Test Follow Up List\_2018072', 'FERGE Test Initial List\_20180727-11', 'FERGE Test Follow Up List\_2018072', 'FERGE Test Initial List\_20180730-11', 'FERGE Test Follow Up List\_2018073', and 'FERGE Test Follow Up List\_2018073'. Red arrows point to the 'Username' field (1), the 'Password' field (2), the search icon (3), and the dropdown arrow (4).



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

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

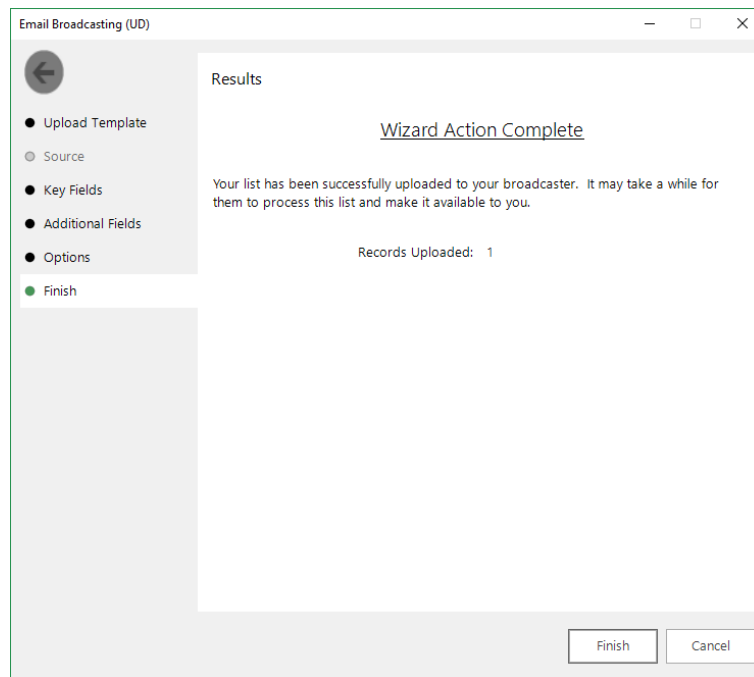
Table 4 – EmailResponseGatherer.exe.config Settings

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

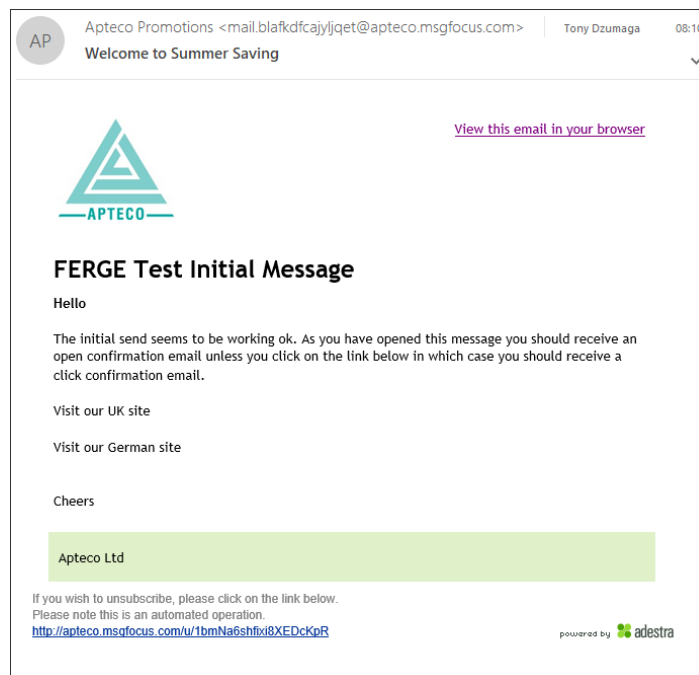
4. If you entered a message name, a Broadcast Warning message displays meaning this will send a message to your target audience

Click **Yes** to commit this action

- Once the list has been uploaded (and if applicable the message delivery has been scheduled), the wizard will complete. Click **Finish** to close the wizard.



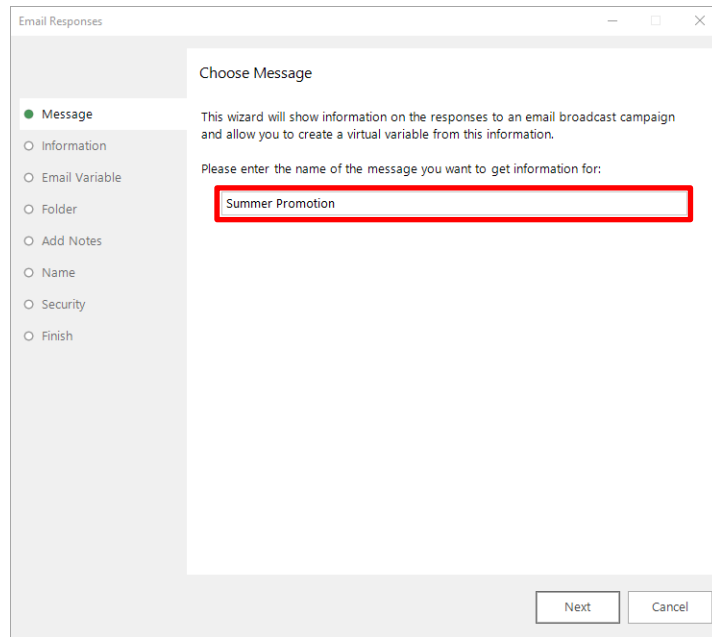
- The recipients in your selection should receive an email using the template from Dotdigital



## 4.5 Email Responses Wizard

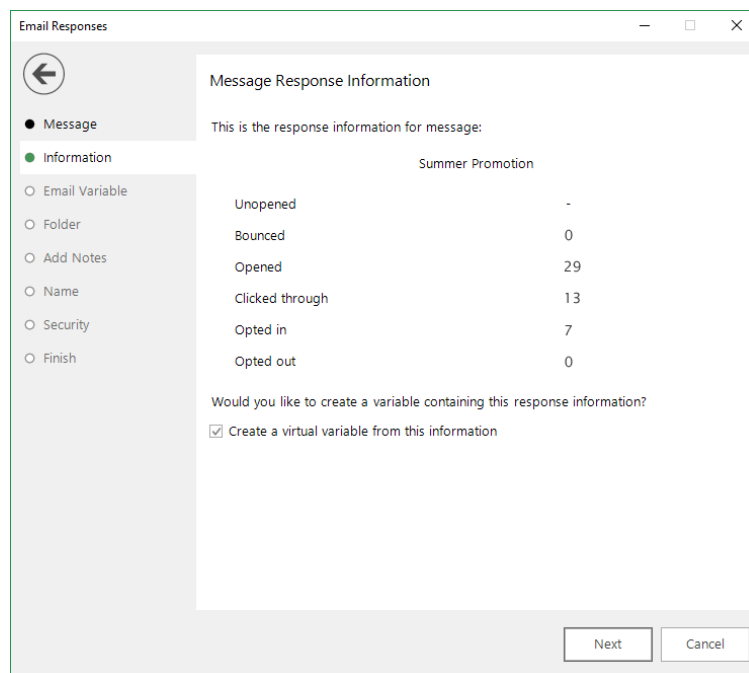
When your emails have been sent out you can start analysing the responses from your target audience.

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



The screenshot shows the 'Email Responses' wizard window. The title bar reads 'Email Responses'. On the left is a sidebar with a list of steps: Message (selected), Information, Email Variable, Folder, Add Notes, Name, Security, and Finish. The main area is titled 'Choose Message'. It contains the following text: 'This wizard will show information on the responses to an email broadcast campaign and allow you to create a virtual variable from this information.' Below this is a prompt: 'Please enter the name of the message you want to get information for:'. A text input field contains the text 'Summer Promotion' and is highlighted with a red border. At the bottom right are 'Next' and 'Cancel' buttons.

3. As the Email Response Gatherer starts collecting information from Dotdigital, you will see how customers are interacting with your broadcast. If you want to analyse this information further, click on Create a virtual variable from this information and then click Next

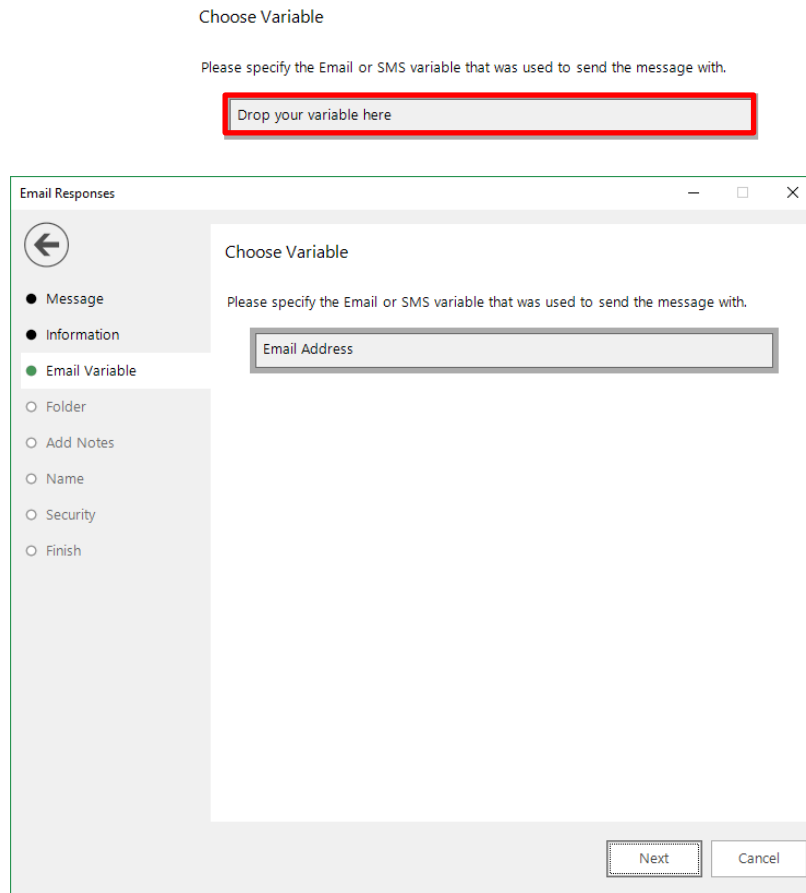


The screenshot shows the 'Email Responses' wizard window at the 'Message Response Information' step. The title bar reads 'Email Responses'. The sidebar on the left has 'Information' selected. The main area is titled 'Message Response Information' and contains the text: 'This is the response information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

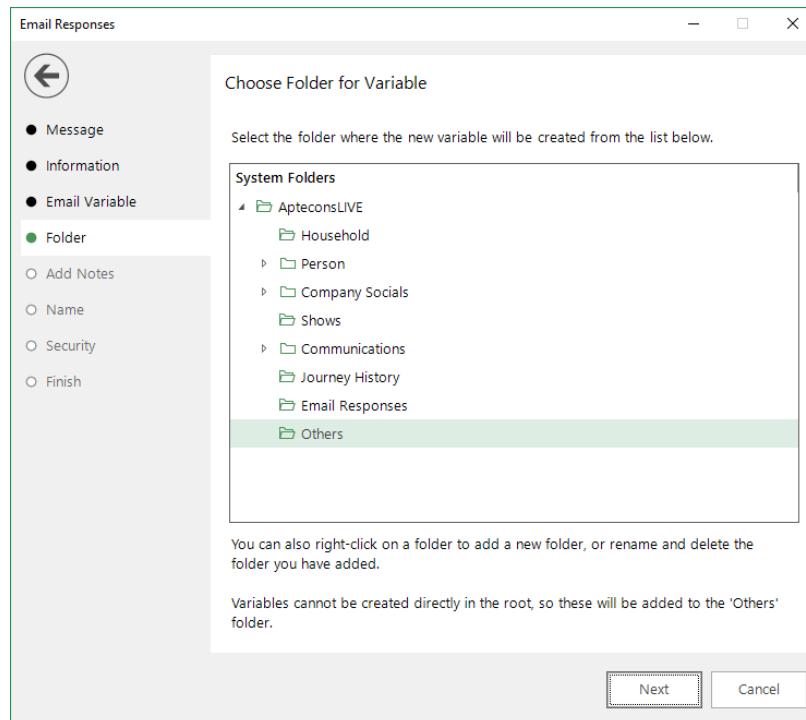
Unopened	-
Bounced	0
Opened	29
Clicked through	13
Opted in	7
Opted out	0

Below the table is a question: 'Would you like to create a variable containing this response information?'. There is a checked checkbox next to the option 'Create a virtual variable from this information'. At the bottom right are 'Next' and 'Cancel' buttons.

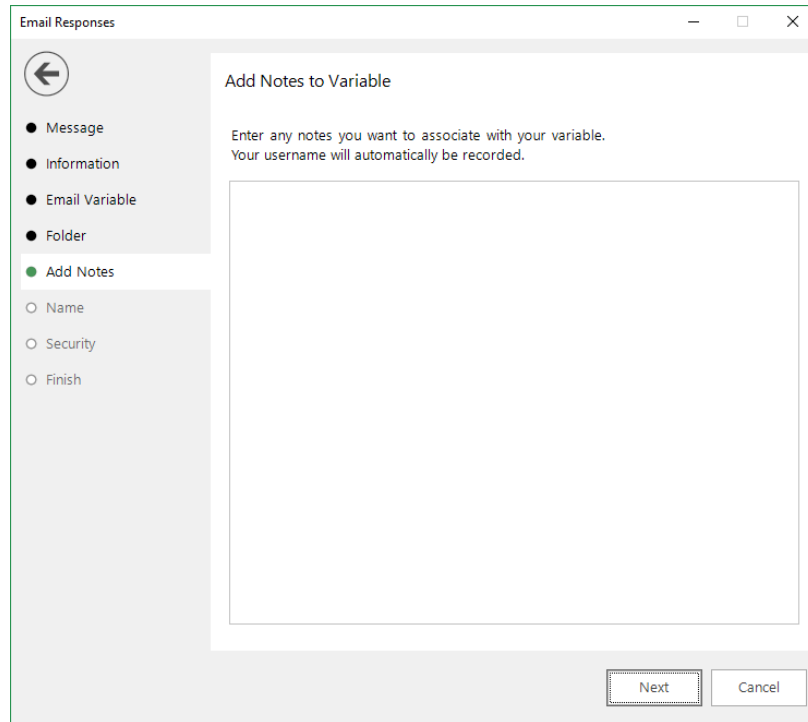
4. Drag the Email variable that you used in the Email Broadcasting wizard onto the drop box and click **Next**



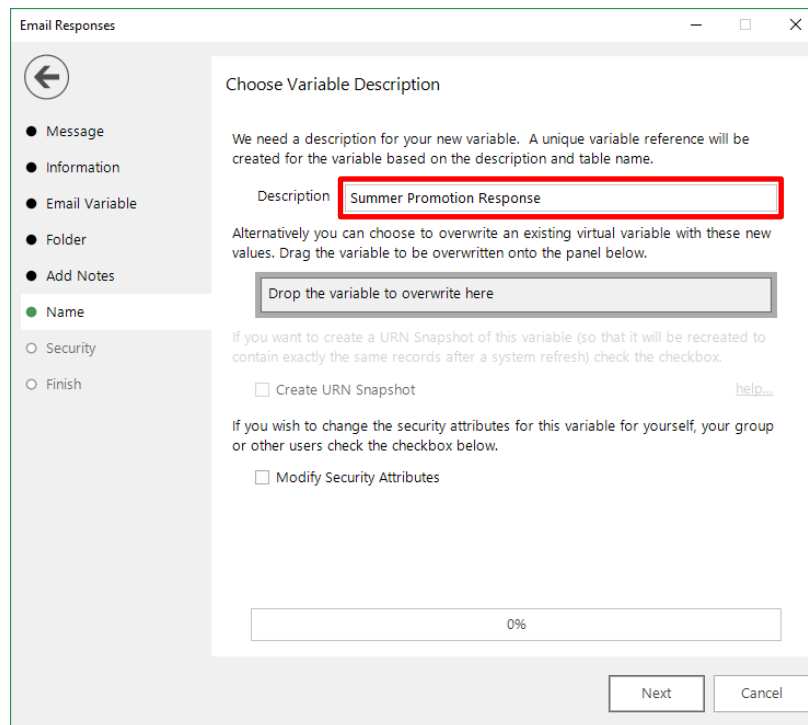
5. Locate the folder where you wish to store the virtual variable and click **Next**



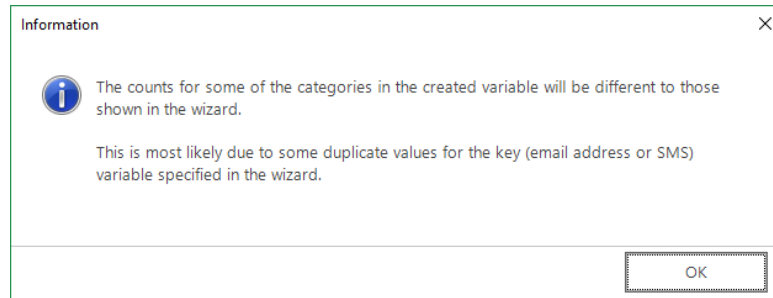
6. Enter any notes that will be stored along with the virtual variable and click **Next**



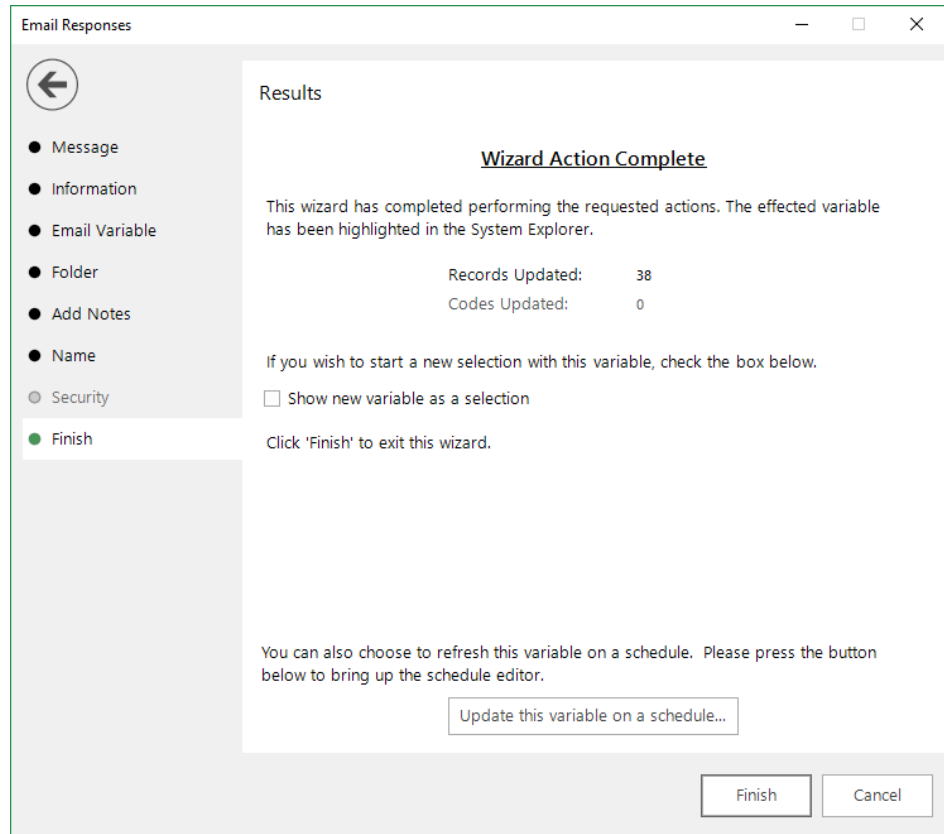
7. Enter a Description for the virtual variable or drag an existing virtual variable onto the drop box if you wish to overwrite it. Modify the Security Attributes if applicable and then click **Next**



8. Click **OK**



9. Click **Finish**

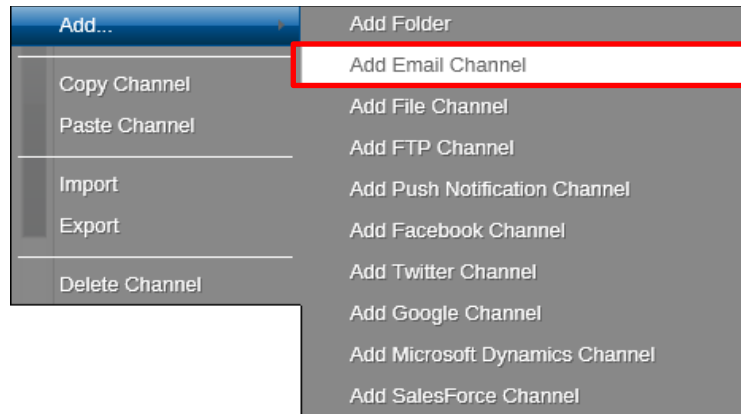


# 5 PeopleStage Broadcasting & Responses

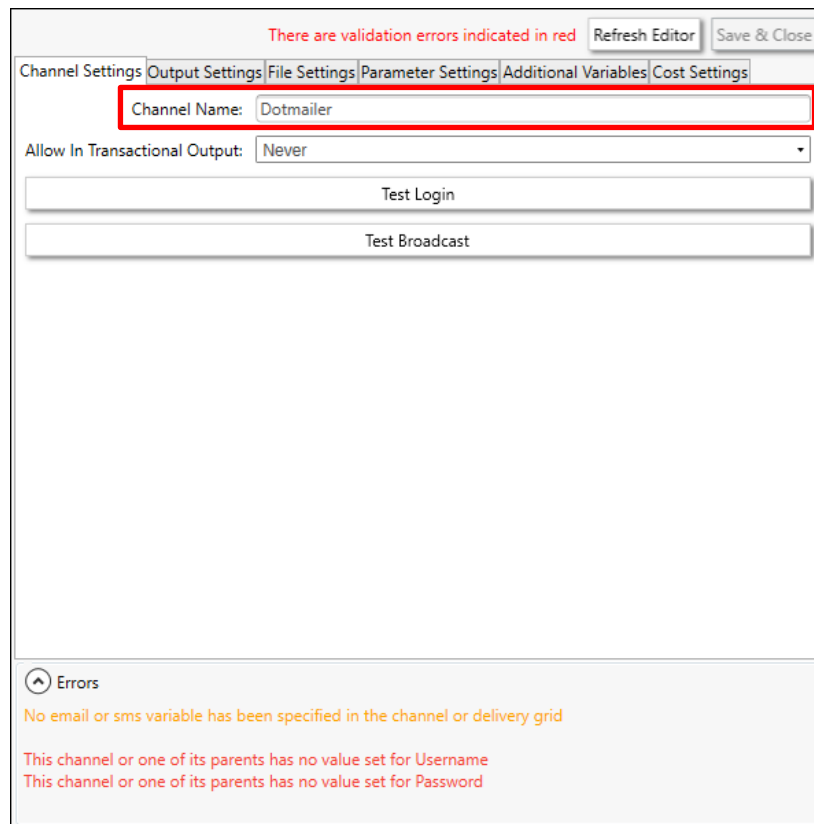
## 5.1 Defining the Broadcast Channel in PeopleStage

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

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 Dotdigital

The screenshot shows the 'Output Settings' configuration page. At the top right are 'Refresh Editor' and 'Save & Close' buttons. Below are tabs for 'Channel Settings', 'Output Settings', 'File Settings', 'Parameter Settings', 'Additional Variables', and 'Cost Settings'. The 'Output Settings' tab is active. Fields include: Broadcaster (DotMailer), Username (apiuser-01234567@apiconnector.com), Password (masked), Email Variable (Email Address (peEmail)), Variable Description Override (Email), SMS Variable (Select a Variable), Reply Email Address (robin.holderness@apteco.com), Reply SMS Number, checkboxes for 'Upload but don't broadcast' and 'Append to List', Number of Retries (0), Response File Key Type (Email), and Message Content Type (Broadcaster Template). An 'Errors' section is at the bottom.

Table 5 –PeopleStage Output Settings

Field	Settings
Broadcaster	Select <b>Dotdigital</b> from the drop-down
Username	Enter your <b>API username</b>
<b>Note:</b> Prefix the username with the account name followed by a full stop	
Password	Enter your <b>API password</b>
Variable Name	Select <b>Email Address</b> from the drop-down
Variable Description Override	Enter the description, for example, “Email Address” <b>Note:</b> This must correspond to the e-mail field within Dotdigital
Upload but don’t broadcast	(Optional) – Select this check box to upload the list only without initiating a broadcast
Reply email Address	The email address that will receive notifications when the channel is used, i.e. list uploaded / broadcast. <b>Note:</b> This is not the reply email address that will be used for the email send.
Number of Retries	The number of times to retry on failure of the channel. It is recommended (for Broadcast Channels) to leave this at 0. The Delivery Agent also has a retry value, so setting this to > 0 can result in multiple retries and may cause undesirable results
Response File Key Type	The key field to match responses to sends. Varies from broadcaster to broadcaster due to the fields they return in the response file. Should be set to Communication Key for Dotdigital.
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, there are no required parameters, these are optional depending on your requirements.

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

Table 6 –Example PeopleStage Parameter Settings

Field	Reqd	Settings
	.	
		*Example, these will be specific to your account
Email Field Name	N	Override the email field name used in your FastStats system.
Urn Field Name	N	Override the Urn field name used in your FastStats system.
Communication Key Field Name	N	Override the communication key field name used your FastStats system.
File Mapping	N	A list of pipe delimited fields (these headings will overwrite any defined in your output sequence). e.g. Urn   FirstName   LastName   Company   Email   Message   Discount*

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

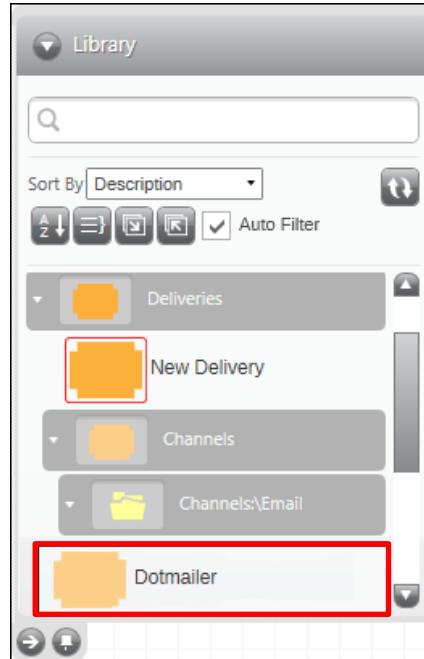
Additional Variables Location: End

Errors

## 5.2 Broadcasting in PeopleStage

You can now test your channel at any Delivery Stage

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



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

Dotdigital stores all your contacts in a database and segments them using the lists you upload into Address Books. Custom data fields can be created to hold specific transactional data, contact your Dotdigital Account Manager or the Dotdigital support desk for help setting up these fields.

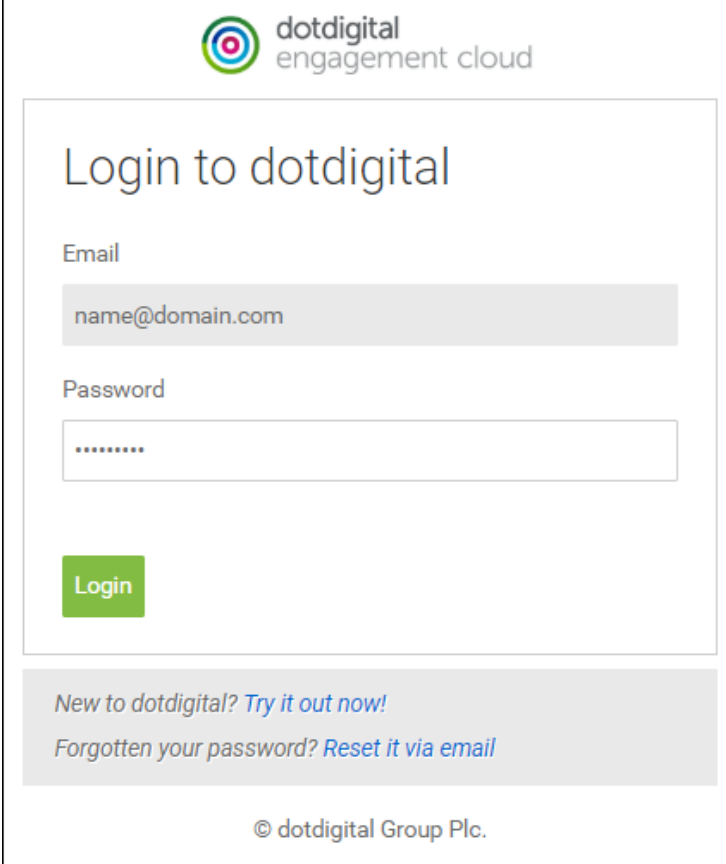
---

**Important:**

You must be a user (a member in the Dotdigital team) to use Dotdigital

---

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



dotdigital  
engagement cloud

## Login to dotdigital

Email  
name@domain.com

Password  
.....

Login

[New to dotdigital? Try it out now!](#)  
[Forgotten your password? Reset it via email](#)

© dotdigital Group Plc.

---

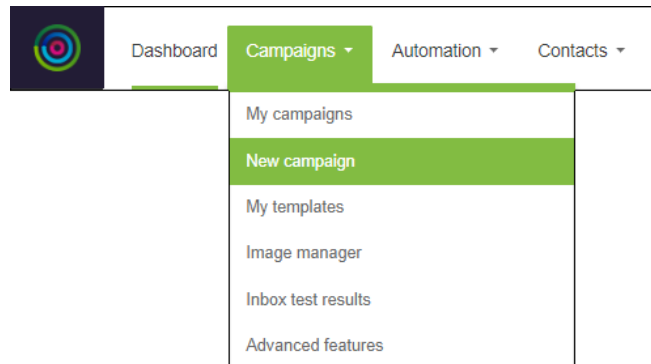
**Note:**

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

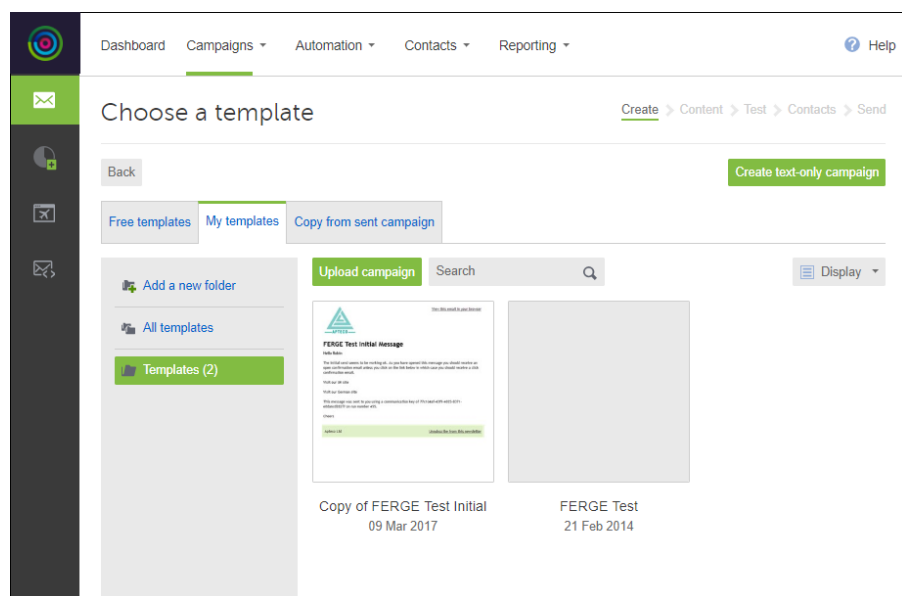
---

## Setting up a Campaign in Dotdigital

1. From the navigation menu select **Campaigns > New campaign**



2. Select a template



3. Enter a **Name** for the Campaign using the options and click Continue



4. Enter a **Subject Line, Friendly from name**, and choose a **From address**, then click **Save & Continue**

Provide a few campaign setup details Create > Content > Test > Contacts > Send

TechDocs [\[Rename\]](#)

Back Split test settings Campaign settings Save & continue Save

### Campaign details

Subject line \*

Friendly from name \*

From address \*

Forwarding address

Campaign tags

[Preview](#)

5. Edit your Campaign then click **Save & Continue**

Edit your campaign content Create > Content > Test > Contacts > Send

TechDocs [\[Rename\]](#)

Back Preview Test send Utilities Save & continue Save

**Build** Styles

Building blocks

Content

- Text
- Image
- Image & text
- Text & image
- Button
- PayPal
- Video

Layout

- Columns
- Spacer


Tools

- RSS feed

My building blocks

Images

[View this email in your browser](#)



## FERGE Test Initial Message

Hello @FIRSTNAME@

The initial send seems to be working ok. As you have opened this message you should receive an open confirmation email unless you click on the link below in which case you should receive a click confirmation email.

Visit our UK site

Visit our German site

This message was sent to you using a communication key of @COMMUNICATION\_KEY@ on run number @RUN@.

Cheers

Apteco Ltd
[Unsubscribe from this newsletter](#)

## Appendix B: API Parameters

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

Table 9 – Email Response Gatherer Parameters

	Required	Default	Dotdigital extract file column
APIHost	N	<a href="https://api.dotmailer.com/v2/">https://api.dotmailer.com/v2/</a>	The endpoint url for the api calls.
DmTimeout	N	300	This value refers to the number of seconds the Dotdigital webservice will wait until timing out the request.
MESSAGEPERIOD	N	7 days (7D).	This value refers to the period in which you want to check for responses. This can be in days (xD) or months (xM).
TreatTypeAsAdditionalField	N	false	Setting this to true will force the raw response type to be written to the ReponseDetails table, before any conversion is carried out.
LookupBroadcastsOnTheFly	N	false	The default value of 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.
ExecutionTag	N		When using Smart Execution, this can be used to identify separate accounts when using the same broadcaster.
ExecutionBuffer	N	0	Adds a buffer in minutes to the start of the response window. Use this to create an overlap to allow for delayed response notifications.

**Note:**

\*These settings are specific to each Dotdigital account.



Table 10 – Email Broadcasting Parameters

Parameter	Required Y/N	Default	Description
ApiHost	N	https://api.dotmailer.com/v2/	The endpoint url for the api calls.
DmTimeout	N	300	This value refers to the number of seconds the Dotmailer webservice will wait until timing out the request.
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
AddressBook	N		Enter the name of an existing address book if you wish to replace or append records to it.
SegmentFieldName	N		Enter the name of a segment field if you wish to segment data in an existing address book. The list name will be used as the segment value.
FileMapping	N		A pipe delimited list of header values that will overwrite any defined in your output sequences.
UrnFieldName	N	Urn	Enter the name of the field that holds your urn data.
CommunicationKeyFieldName	N	Communication_Key	Enter the name of the field that holds your communication key data.
EmailFieldName	N	Email	Override the email field name used in your FastStats system.
MaxWaitTime	N	7200	The maximum time to wait for a list to be uploaded in seconds
AddNewFields	N	false	Set this value to true to automatically create new fields that may be in your output.

# Appendix C:Example Batch File

## Example batch file to use with FERG and scheduling

```
@echo off

REM *****

REM File Name: DotdigitalBatchFile.bat

REM Date: 30/01/2018

REM ToDo:

REM Define the drive and folders to output the log files

REM Set FERG to define the location of the EmailResponseGatherer64.exe

REM Set LOGFILE to the folder where the event logs are stored

REM Set LOGFILEDETAILS to the folder where detail logs are stored

REM Define the XML configuration file to use

REM *****

C:

cd C:\FastStats\FERG

REM *****

REM Change the drive letter to match the drive where your FastStats directory has been setup

REM *****

cls

SET FERG="%ProgramFiles%\Apteco\FastStats Email Response Gatherer x64\EmailResponseGatherer64.exe"

SET LOGFILE="Logs\Dotmailer.txt"

SET LOGFILEDETAILS="Logs\Dotdigital_Details.txt"

echo. >> %LOGFILE%

echo. >> %LOGFILEDETAILS%

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

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

echo. >> %LOGFILE%

>> %LOGFILEDETAILS%

echo.

%FERG% Dotdigital.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 Dotdigital Responses OK >> %LOGFILE%

**goto** Complete

**:FailedLogin**

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

**goto** Complete

**:FailedDownload**

**echo** %date% %time% - FastStats Gatherer Failed - Downloading from Dotdigital >> %LOGFILE%

**goto** Complete

**:FailedLogout**

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

**goto** Complete

**:FailedException**

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

**goto** Complete

**:Complete**

**echo** %date% %time% - Completed FastStats Dotdigital 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\Dotdigital.xml'.

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

```
%FERG% Dotdigital.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](http://www.apteco.com/support)

T: +44 (0)1926 407 595 (Support Desk)

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**Apteco GmbH**

Schaumainkai 87  
60596 Frankfurt am Main  
Germany  
T: +49 (0) 69 25 66 97 0 – 0  
[support@apteco.de](mailto:support@apteco.de)  
[www.apteco.de](http://www.apteco.de)

**Apteco Australia Pty Ltd**

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

**Apteco Benelux**

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

**Head Office**

**Apteco UK**

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

T: +44 (0) 1926 407565  
E: [support@apteco.com](mailto:support@apteco.com)  
W: [www.apteco.com](http://www.apteco.com)

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INSIGHT INTO ACTION