



Apteco

Technical Guide

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

Emarsys Integration Guide
D062T3X003 – August 2019

Revision Tracking Sheet

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

Note:

Every effort has been made to keep the information up to date there may be changes to the broadcaster's API if in doubt contact your support department.

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

PageRevision

All pages November 2019

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1 Introduction

This integration guide details the processes required to integrate the Apteco Marketing Suite with the Emarsys 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 into your FastStats system for further analysis.

PeopleStage

Automate data uploads for unattended and scheduled marketing broadcasts, PeopleStage allows you to define and implement marketing process flow diagrams that 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 Emarsys. Use of the Apteco Marketing Suite in combination with Emarsys software through this integration does not affect the intellectual property rights indemnity provided in the Apteco Marketing Suite “End User Licence Agreement”.

1.1 Summary of Emarsys functionality

Technology

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

Supported Integrations

Emarsys supports all the above integration options.

Type of Integration – User Defined

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

1.2 Before You Begin

CAUTION

This guide assumes you have the relevant Apteco Marketing Suite system administration experience to perform this task, particularly with the FastStats Administrator, SQL Server and the areas of the Apteco Marketing Suite that relate to creating selections and campaign creation. If you do not, contact your Apteco partner or the Apteco support team. You need to have the appropriate system and SQL Server administrator permissions to install the relevant components successfully. Additionally, you will need to have Access to the broadcaster web-based control panel and obtain all the relevant information from Emarsys. You will also need to understand how to construct your message in Emarsys.

This guide details the steps required to integrate FastStats and PeopleStage with a Broadcaster using an API; the document is in two parts:

- The configuration of the Apteco Marketing Suite
- Appendices which include:
 - a. A summary of configuration in Emarsys
 - b. API Parameters

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

- Make a note of your Message(Campaign) and List names that you create in Emarsys
- Make a note of the parameter name/s in curly brackets used for personalisation in the message.

for example {Forename} etc. (You must set the upload template settings to use matching settings, if your FastStats system variable names do not match you can use the Override column in the PeopleStage Additional Variables tab)

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>;UserId=faststats_service;Password=fa5t5tat5;`
- The **Digital Integration.zip** available from:
<https://www.apteco.com/portal/software-releases>
- Decide where your **FERG folders** are to be created
Used to store the .xml and .bat files used when scheduling FERG
Note: Bulk insert folder must be accessible from SQL Server to use BULK INSERT
- Decide where you want the FastStats Email Response Gatherer to be installed
This will typically be on the same PC as the FERG folders but can be on any PC

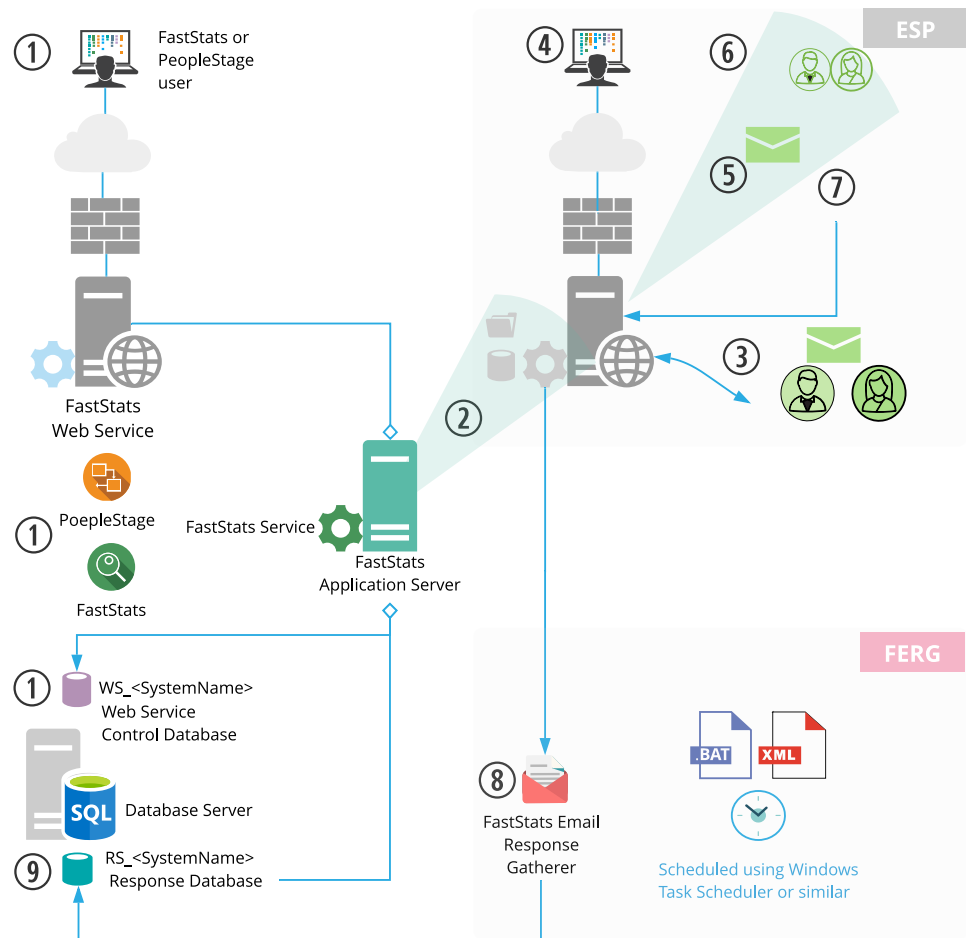
The Emarsys **Account**, **API Key** and **Secret** which can be obtained from Emarsys also the FTP **Username** and **Password**

2 Process Summary

2.1 Architecture

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

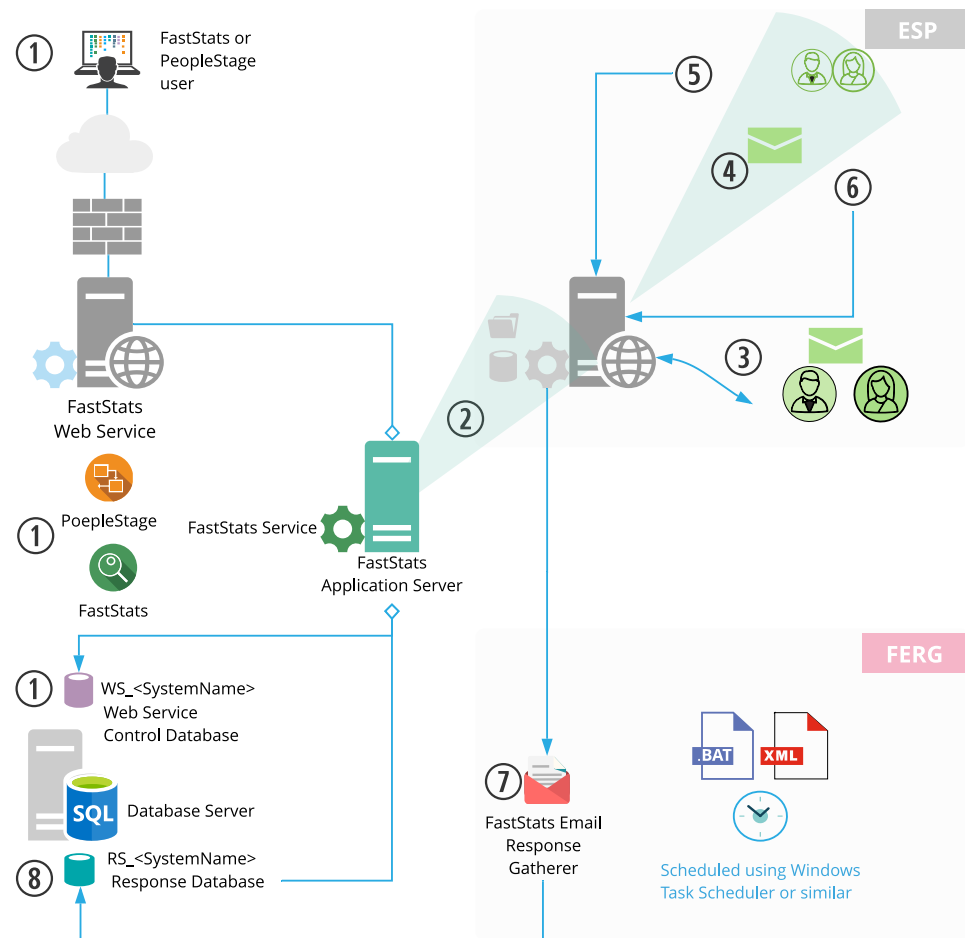
Schematic showing campaign scheduling performed in Emarsys.



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

7. Emarsys records a response for each interaction with a message (for example opens and clicks).
8. A scheduled job on the FastStats server initiates the FastStats Email Response Gatherer (FERG) which checks the SFTP site for response files.
9. These responses are then imported into the Response database (RS_DB) ready for analysis by your FastStats system.

Schematic showing scheduling performed in FastStats or PeopleStage.



The key difference in this process is messages are sent from Emarsys automatically, allowing full control of the campaign scheduling from within the Apteco Marketing Suite.

Note:

For the message to send automatically, you need to create a Campaign Email (Message to use in FastStats or PeopleStage) in Emarsys.

3 Apteco System Configuration

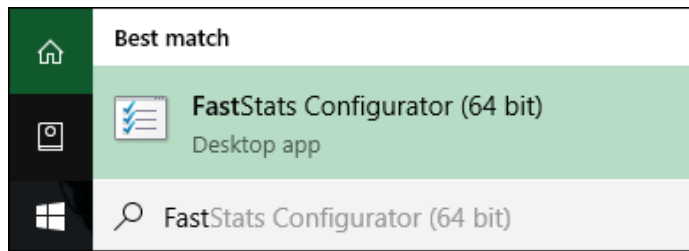
3.1 Creating the Response Database

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

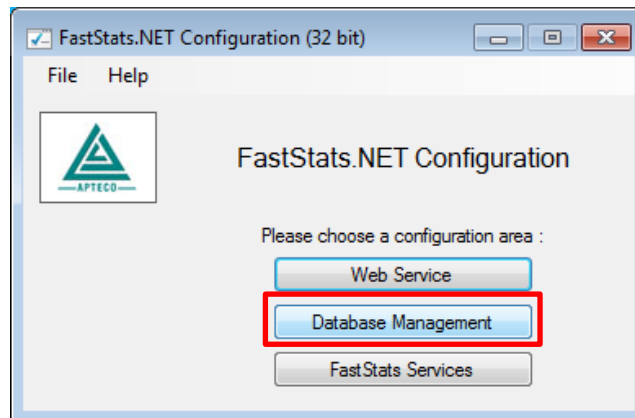
1. Open the FastStats Configurator.

Tip:

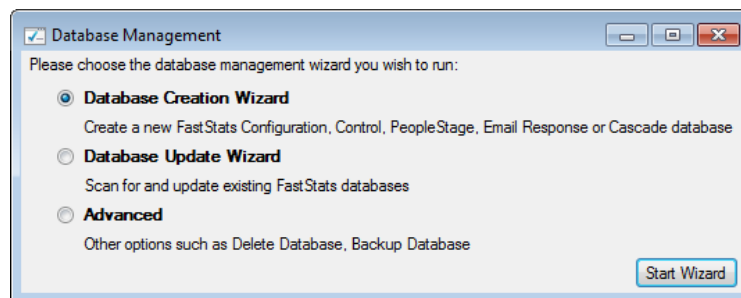
Search for Fast in the Start Menu



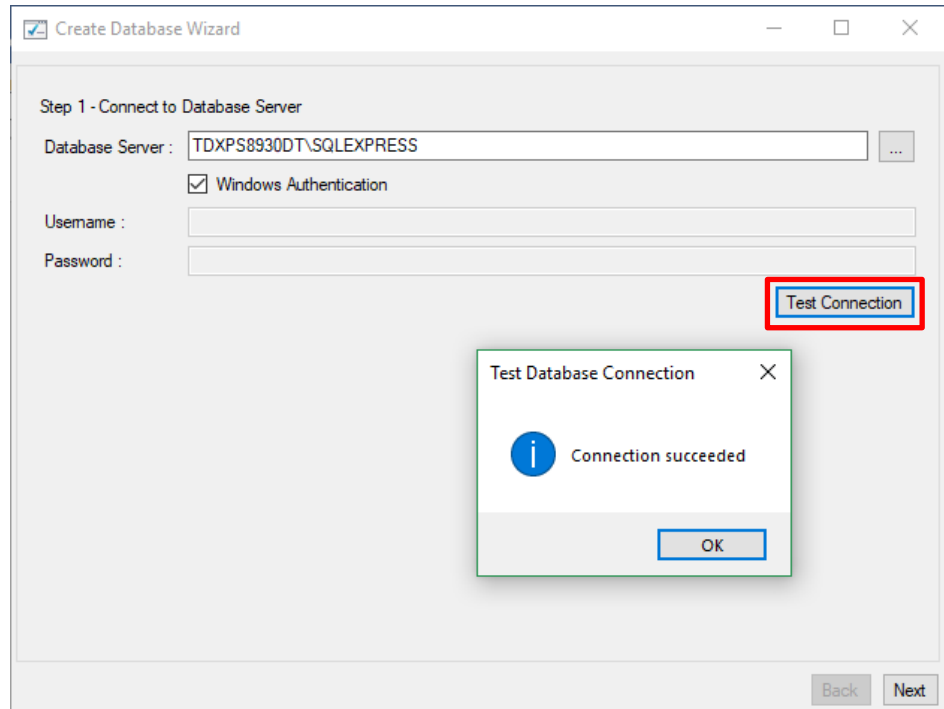
2. Select **Database Management**.



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



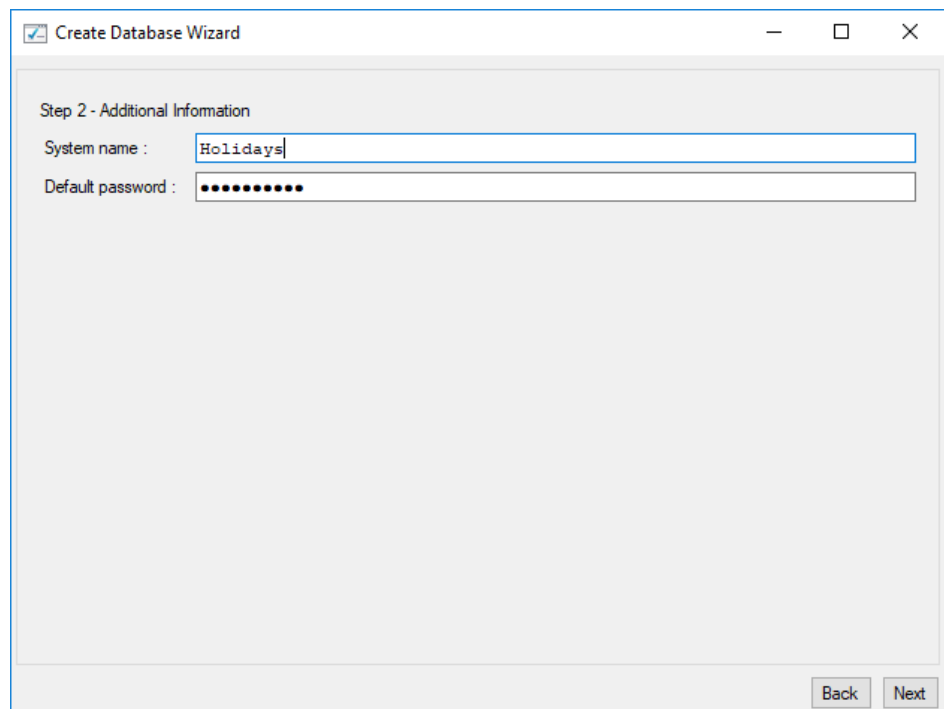
4. Enter the name of the **Database Server** where you wish to store the response database, click **Test Connection**



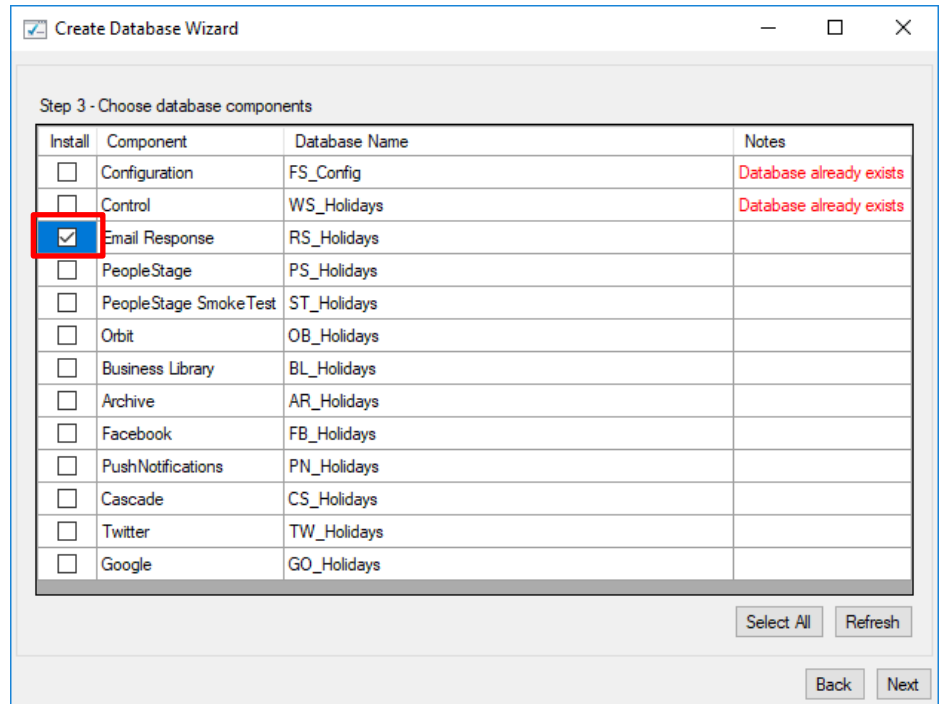
Note:

The Database Server name can be found by launching SSMS and finding the SQL Instance for your FastStats system, for example TDWIN10B\SQLExpress.

5. Enter a System name (for example Holidays) and your secure password.



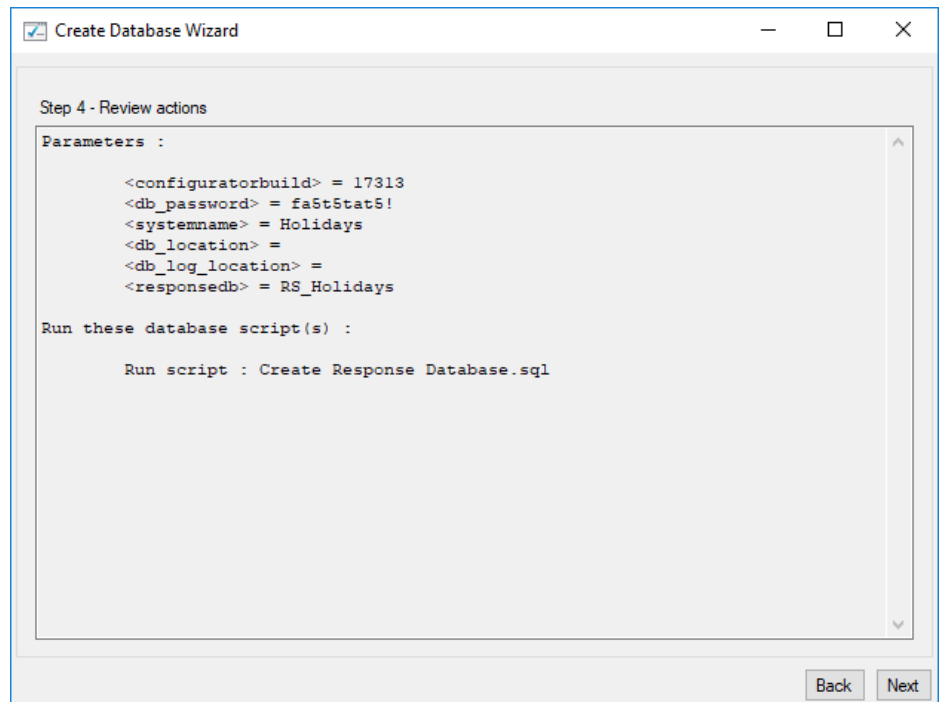
6. Select the **Email Response** check box, then click **Next**.



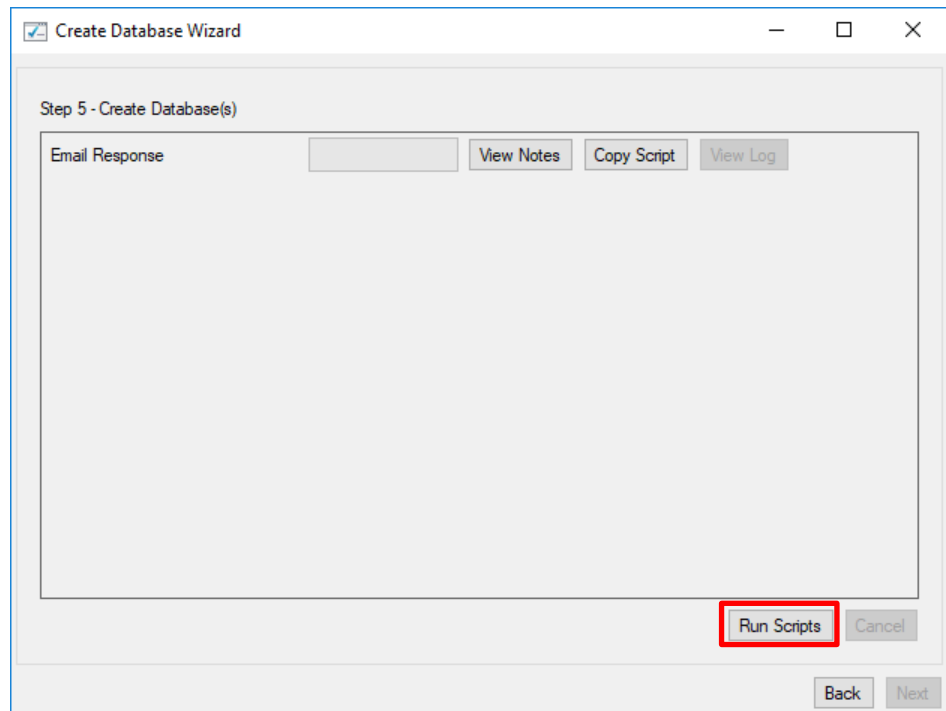
Note:

The Response Database may already exist, see the **Notes** column if it does you do not need to complete this process, click **X** to exit the installer.

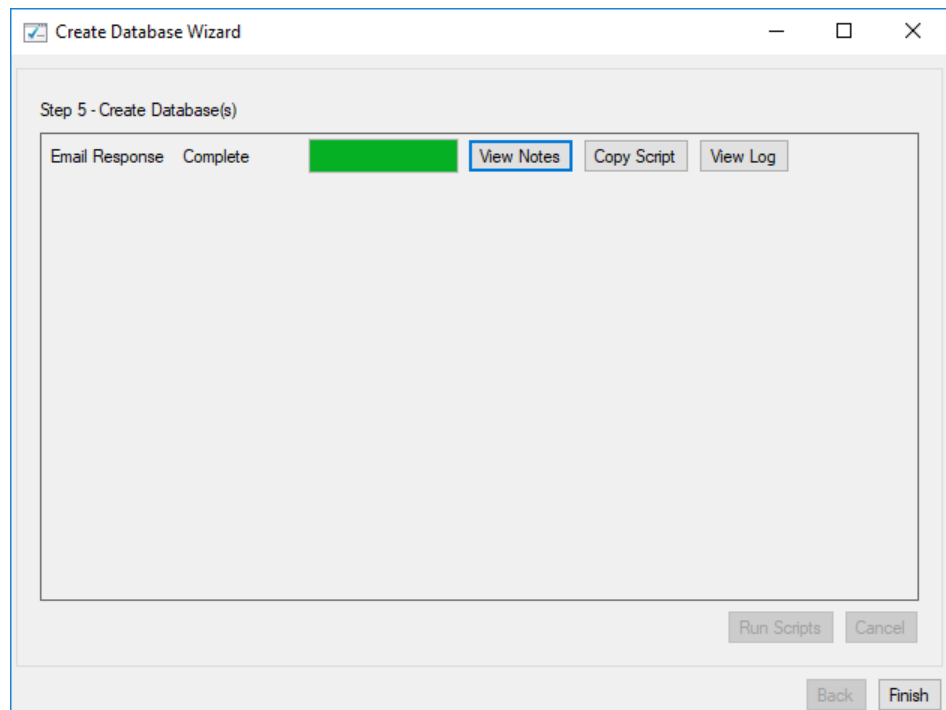
7. Click **Next** on the Review actions step.



8. Click **Run Scripts**.



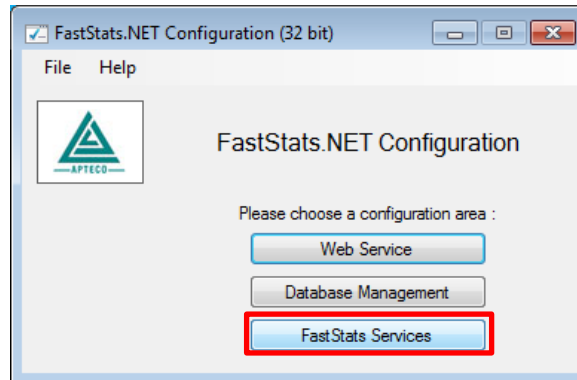
9. Click **Finish**.



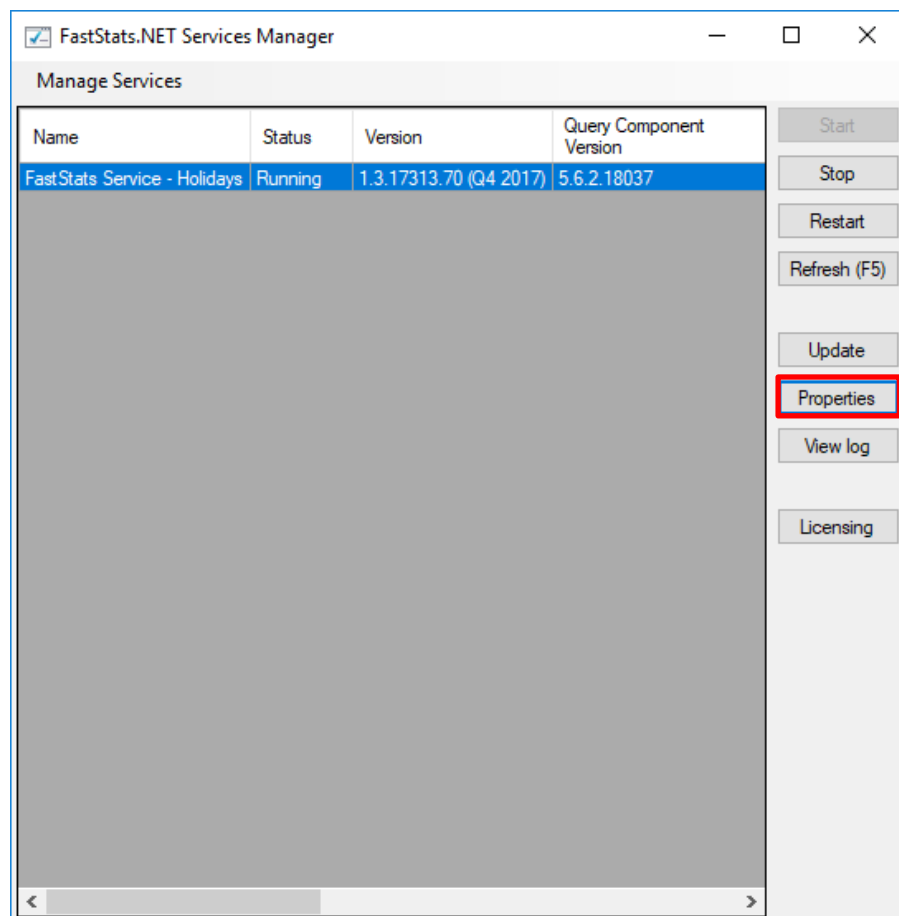
3.2 Linking the Response Database to the FastStats Service

You need link the response database to the FastStats service.

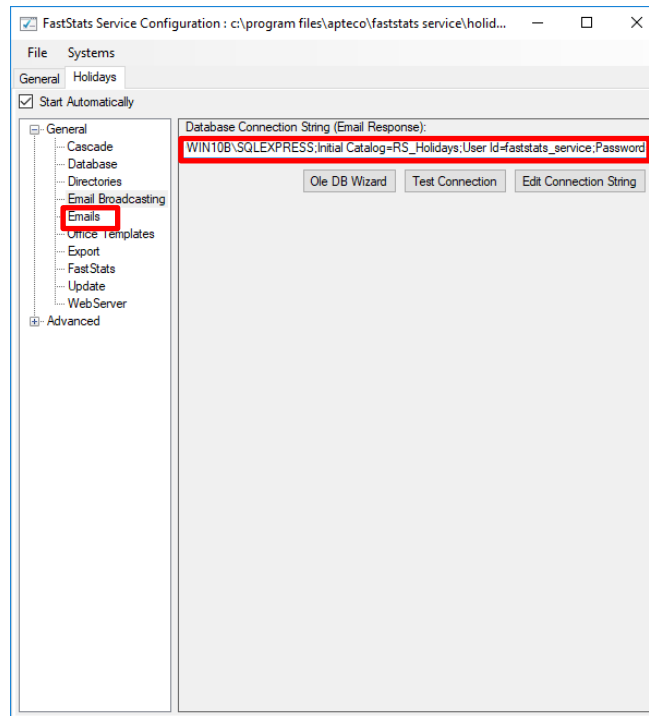
1. Open the **FastStats Configurator**
2. Select **FastStats Services**



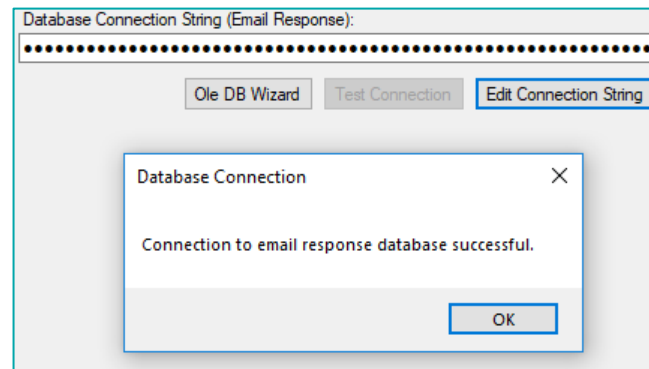
3. Select the **FastStats Service** for the system to link to the response database, click **Properties**



4. Select the system tab you want to link the response database, select **Email Broadcasting** from the list on the left and then enter the database connection string to your response database.



5. Click **Test Connection**, click **OK** to close the dialogue box



6. Select **Save** from the File menu

Note:

A restart of the FastStats service is required to pick up the changes to the configuration, click **Restart** in the **Managed Services** dialogue box.

General Considerations

For broadcasts to work correctly you need to ensure that the FastStats server has access to the relevant Emarsys server through port 443

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:

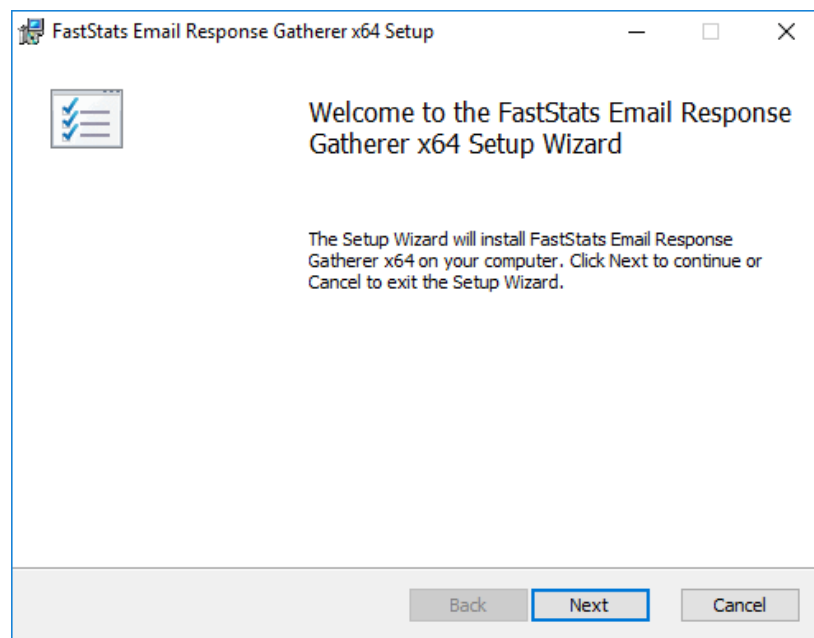
<https://www.apteco.com/portal/software-releases>

Note:

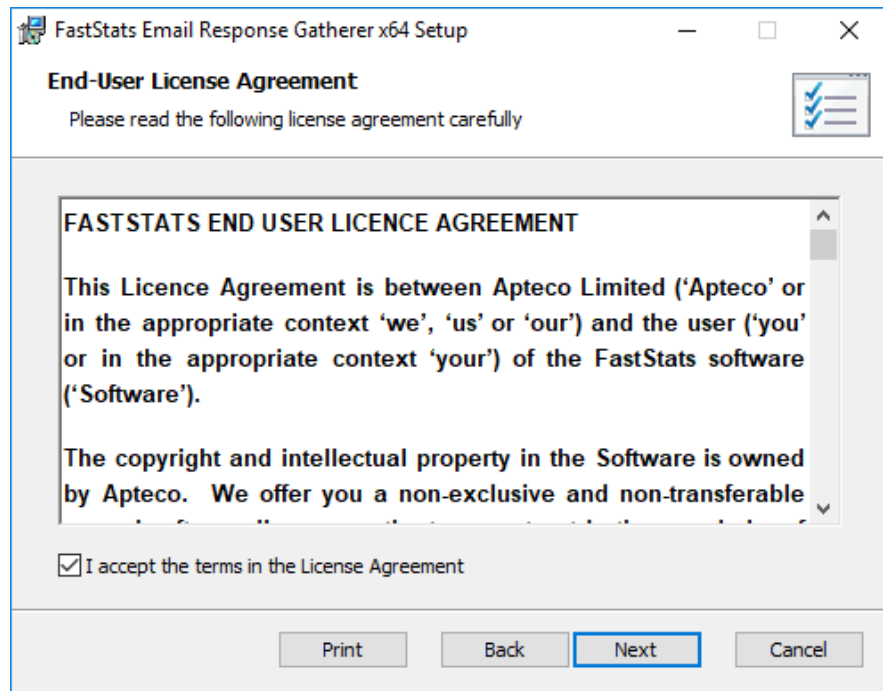
The FastStats Email Response Gatherer application can run on any PC in your system.

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

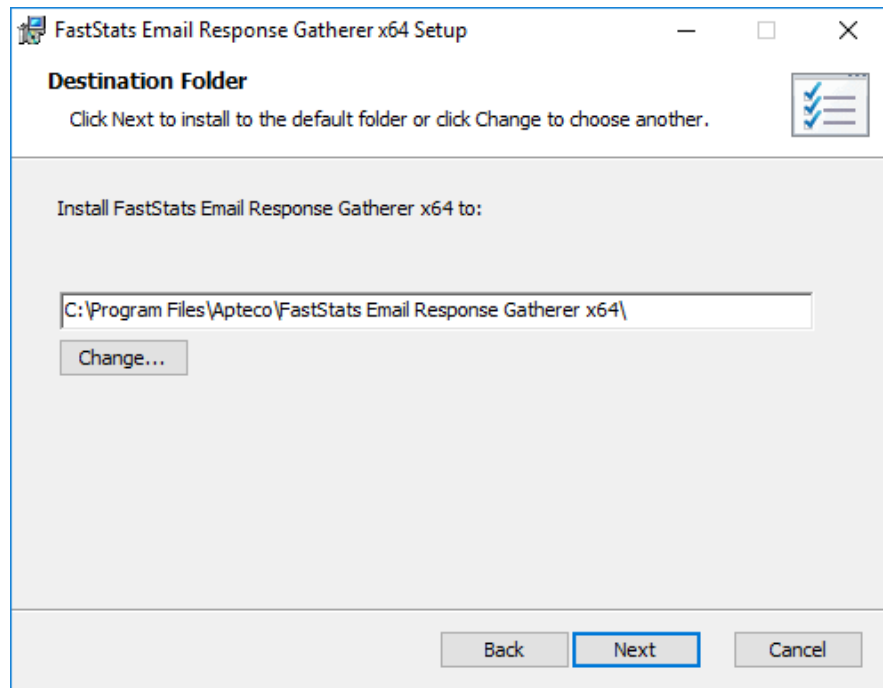
1. Click **Next**.



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



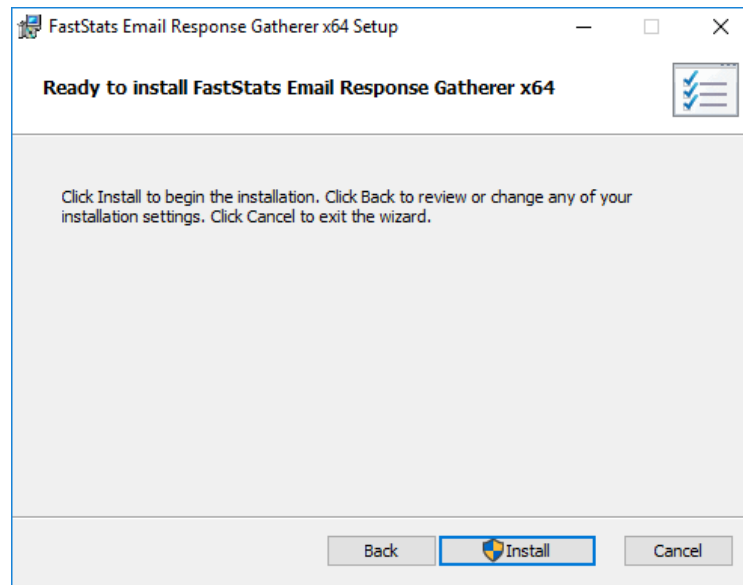
3. Click **Change** if you wish to install the Email Response Gatherer application in a different location then click **Next**



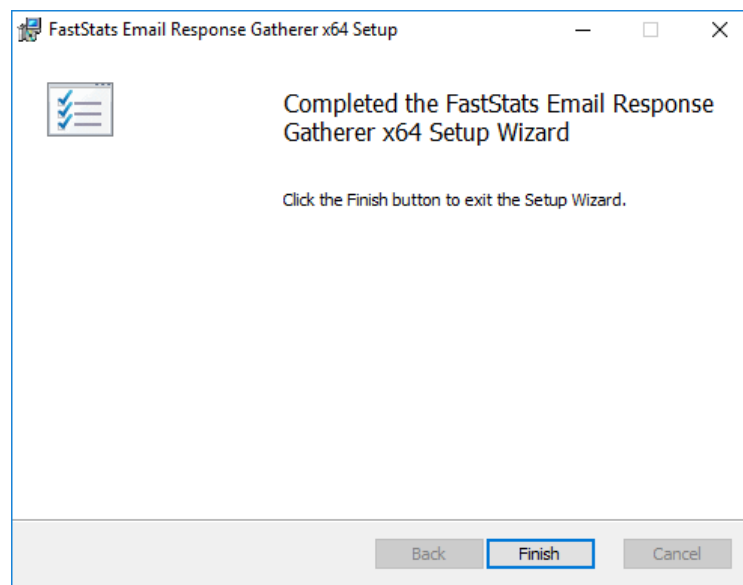
Note:

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.

- Click **Install** to start the installation



- Once the installation has completed, click **Finish**



3.4 Creating the Response Gatherer Folders

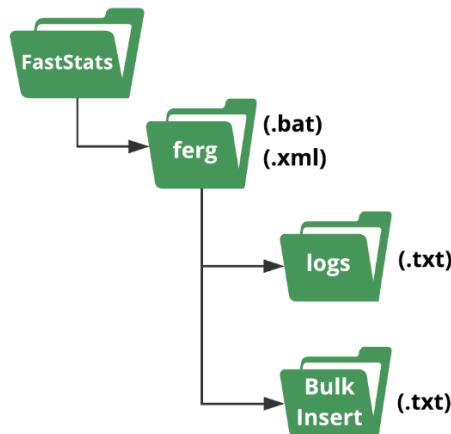
You will need to create folders to store the files to use with the Response Gatherer; these will include the following types of files.

Table 1 – Files Associated with the Response Gatherer

Type of file	Description
Batch (.bat)	Contains the information for applications like Task Scheduler or command-line programs to run the Response Gatherer on a schedule
XML (.xml)	Contains the connection and communication parameters used to connect to the broadcaster
Text files (.txt)	The Response Gatherer will generate two log files each time it runs, an Event log with the times each event occurred, and a Details log with a step by step log of the digital response batch process with the broadcaster

You can create the directories in any user-defined location and use your own choice of name; you must refer to the directories in the batch file.

A typical example folder structure



Important:

The bulk insert directory must be accessible from the SQL server and the user running the SQL Server Service must have read permissions to it.

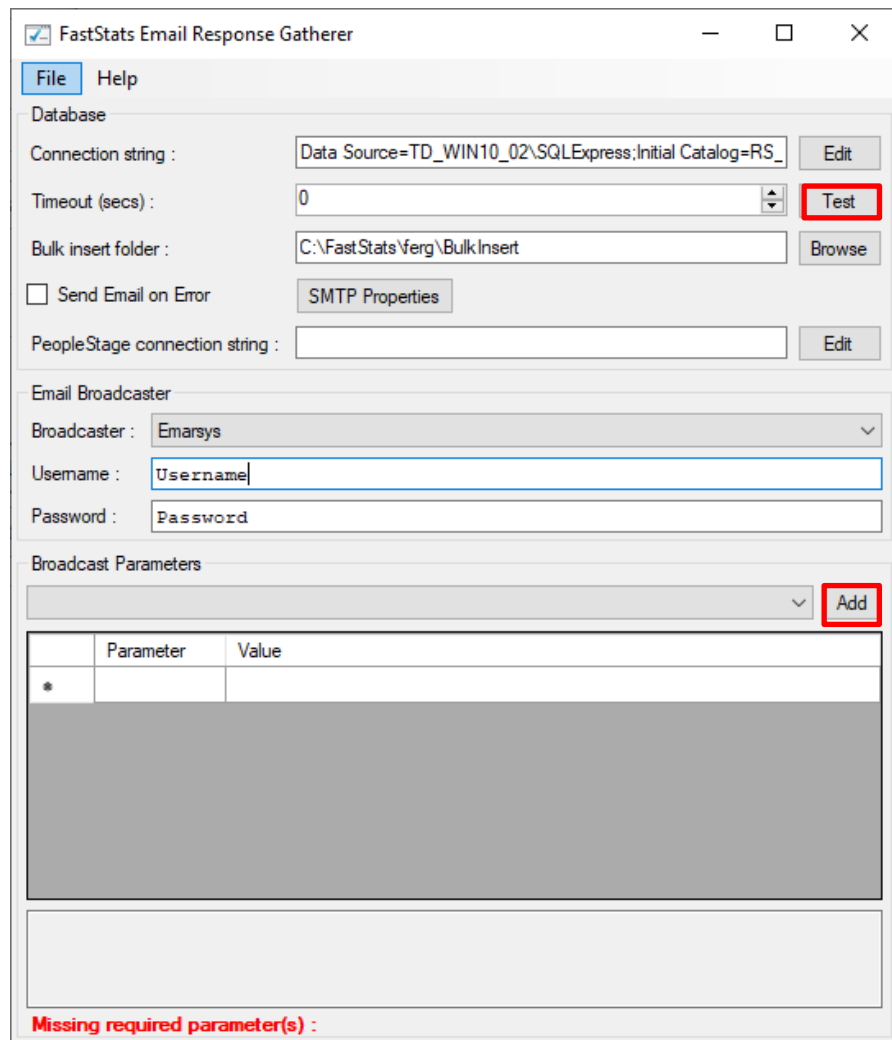
3.5 Creating the Configuration File

You will need to create an XML file containing the configuration settings to use with the Email Response Gatherer; the XML file is specified in an argument when you run the EmailResponseGatherer.exe

Note:

You can use the Response Gatherer with multiple integrations by using an XML and matching batch file for each integration.

1. Browse to the directory where you installed the Email Response Gatherer and open the **EmailResponseConfig.exe**, enter your Connection String and click **Test**
2. Select Emarsys from the Broadcaster drop-down list
3. Enter the **Username** and **Password** to use with the Emarsys API
4. Use **Add** to add all the required parameters for the Broadcaster
5. Use the File menu to save the XML file to the batch and XML file folder



Note:

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

Table 2 – Email Response Config Parameters

Dialogue Item	Settings to use
Connection String (Required)	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 (Required)	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 Emarsys
Username	The Emarsys API Key
Password	The Emarsys Secret

Email Response Config dialogue with REQUIRED FIELDS completed

FastStats Email Response Gatherer

File Help

Database

Connection string : Data Source=aptwarsql1;Initial Catalog=RS_AptLIVE;Integrate Edit

Timeout (secs) : 1200 Test

Bulk insert folder : \\PSIntTest\FastStats\FERG\BulkInsert Browse

Send Email on Error SMTP Properties

PeopleStage connection string : Edit

Email Broadcaster

Broadcaster : Emarsys

Username : AptecoNS

Password : password

Broadcast Parameters

Parameter	Value
ACCOUNT	EmarsysAccount
APIKEY	EmarsysAPIKey
SECRET	EmarsysSecret
DATEFORMAT	dd-MM-yyyy HH:mm:ss
MAXRETRIES	100
WAITTIMESECONDS	10
EXECUTIONBUFFER	60
URL	https://api.emarsys.net/api/v2/
URNCOLUMNNAME	Urn
DISTRIBUTIONMETHOD	local
CONSTANTFIELDS	Broadcaster#Emarsys System#AptLIVE

Your Emarsys account name.

Missing required parameter(s) :

Table 3 – Email Response Gatherer Parameters

Parameter	Req.	Default	Description
ACCOUNT	Y	①	This is your Emarsys account name which you get from Emarsys
APIKEY	Y	②	This is your Emarsys API Key which you get from Emarsys
SECRET	Y	③	This is your Emarsys API Secret which you get from Emarsys
URL	Y		The Emarsys log in URL that you use to access your account. E.g. *https://suite7.emarsys.net/api/v2/
DISTRIBUTIONMETHOD	N	Local	The method to gather responses from Emarsys. Option of 'ftp' or 'local'. Default 'local'. If 'ftp', the values FTPHost, FTPProtocol, FTPPort, FTPUsername and FTPPassword are required.
MAXRETRIES	N	30	This value refers to the number of times the Email Response Gatherer will make the api request when Emarsys server return errors, e.g. 'Cannot run filters that often'(error code 6028), 'The requested data is currently generated'(6030) or 'An export with the same setting is currently running'(4001). This parameter is used with WAITTIMESECONDS
WAITIMESECONDS	N	10	This value refers to the number of seconds the Email Response Gatherer will wait to retry the same api request when it fails. This parameter is used with MAXRETRIES.
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.
DATEFORMAT	N	dd.MM.yyyy HH:mm	Date format used

Note:

The Emarsys ①Account, ②API Key and ③Secret can be obtained from Emarsys

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

3.6 Scheduling the Response Gatherer

You need to set FERG to run on a scheduled basis, provide it with the broadcaster's communication details (in a .xml configuration file) and the location to output the Log files; this example uses Windows Task Scheduler however you can use any similar application or create Command Line (.cmd) files manually.

Creating the Batch Files

The batch files provide the Response Gatherer with the Log file directory and the name of the XML file to use.

Create or modify the batch file using Notepad++ or similar text editor, see appendix C for an example file, save the file to the batch and xml file directory.

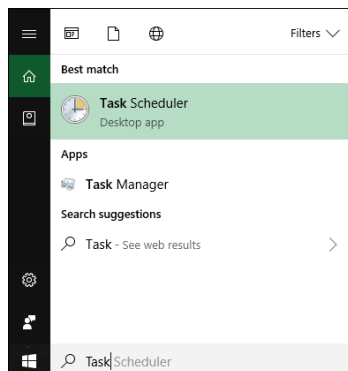
Using Task Scheduler

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

1. Open Windows **Task Scheduler**

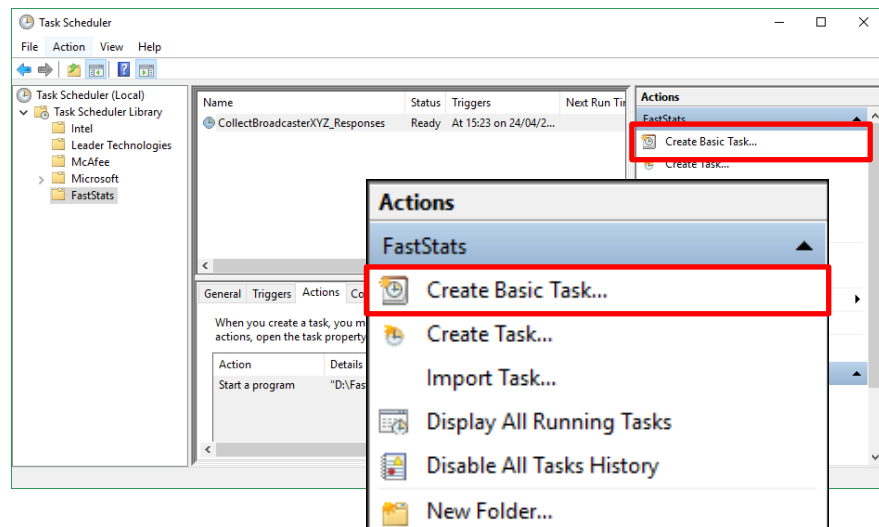
Tip

Search for **Task** in the Start Menu



The Windows Task Scheduler opens

2. Select **Create Basic Task**

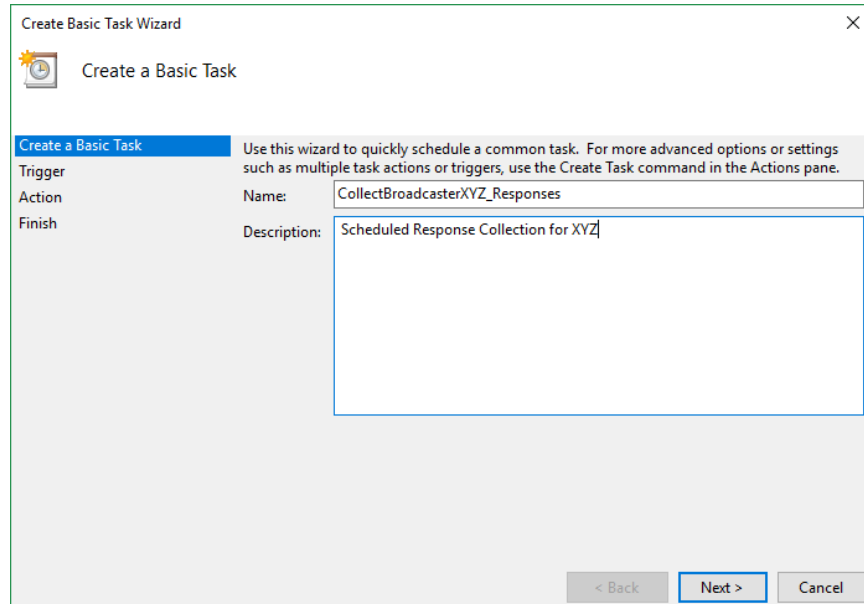


Tip:

You can create folders to organise your tasks

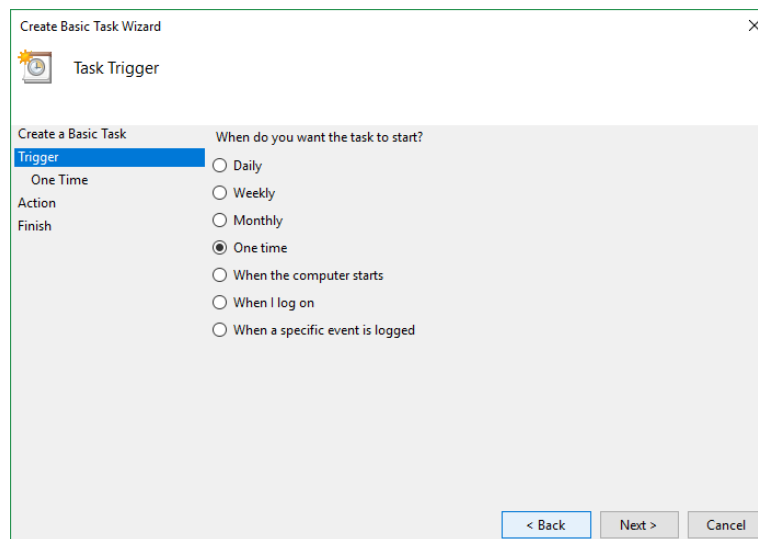
3. **Create a Basic Task** step

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

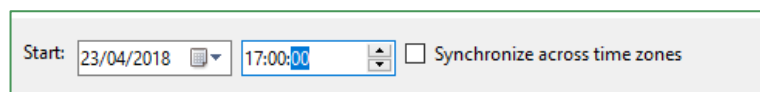


4. **Task Trigger** step

a. Select the **Trigger** interval

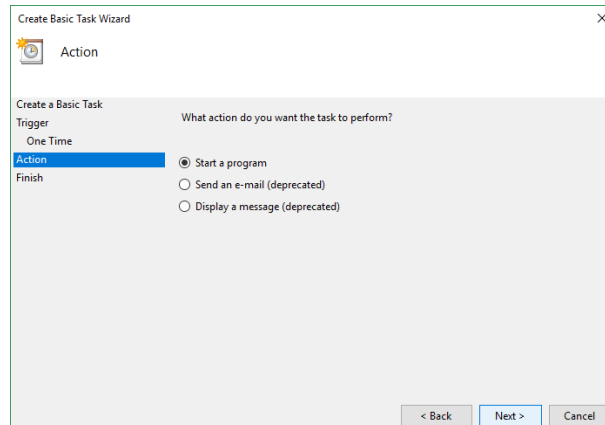


b. Enter the **Start Date** and **Time** or relevant sub-step details



5. Action step

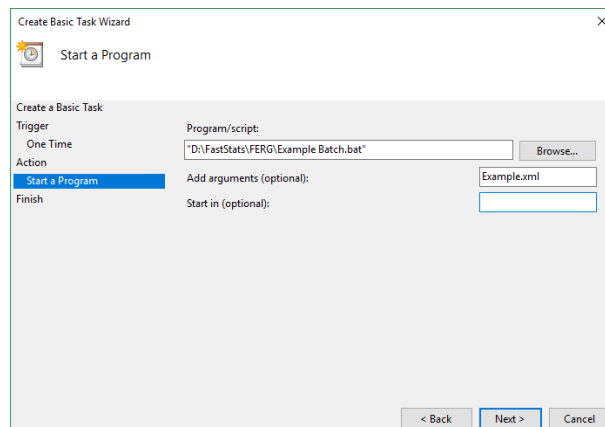
- a. Select **Start a program** and click **Next**



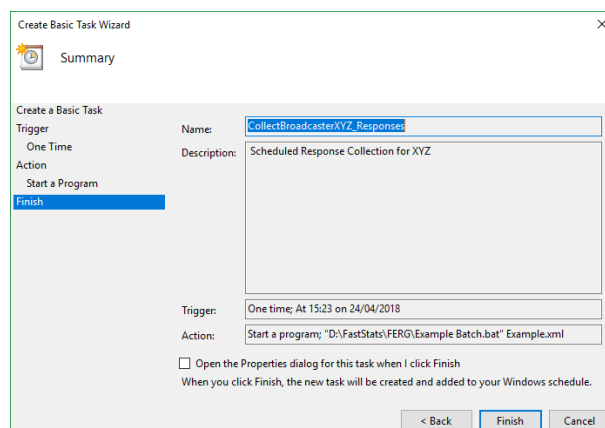
6. Start a Program Step

- a. Click **Browse** then navigate to the folder containing your batch files, select the file to use and click **Open**
- b. **Optional:** Provide the name of the XML configuration file in the **Add arguments** box, click **Next**

Note: The XML file is typically included in the batch file.



7. Summary step – Click Finish



4 FastStats Broadcasting & Responses

Notes:

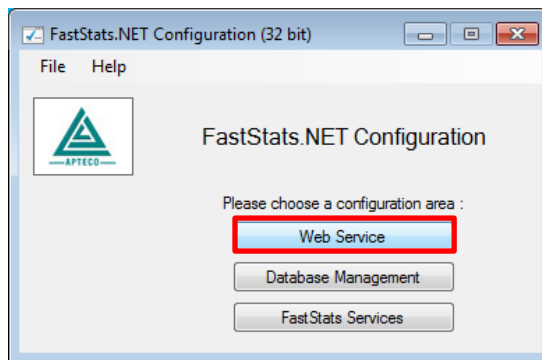
You must log in as an administrator to perform the following task.

The Email Broadcasting Wizard is required for FastStats use only.

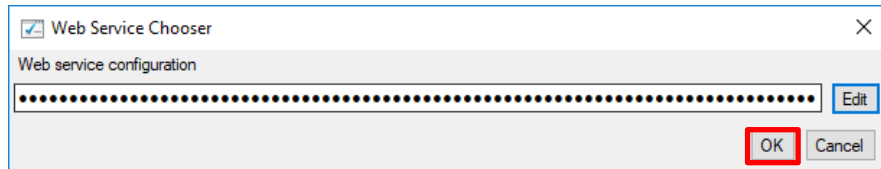
4.1 Enable Email Broadcasting

You must enable the Email Broadcasting wizard plugin.

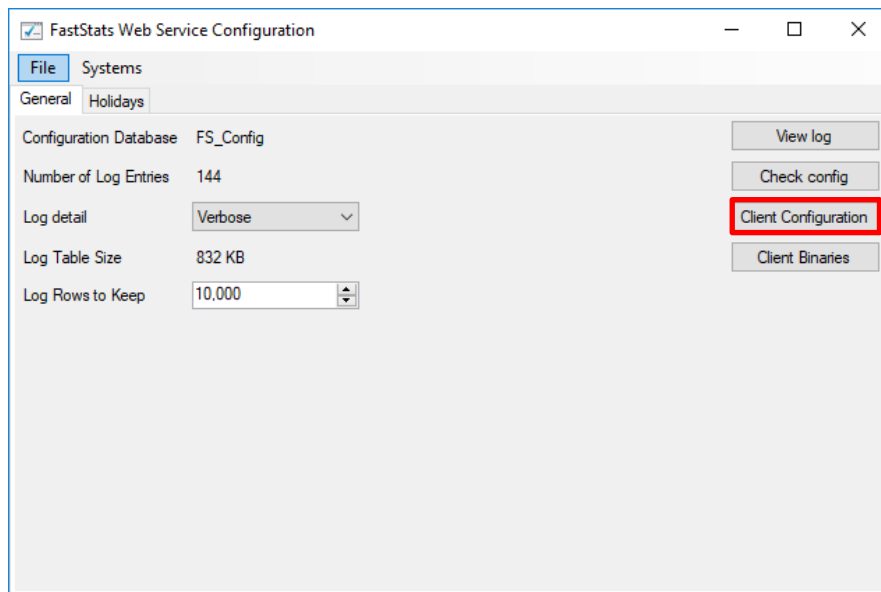
1. Open the **FastStats Configurator**
2. Select **Web Service**



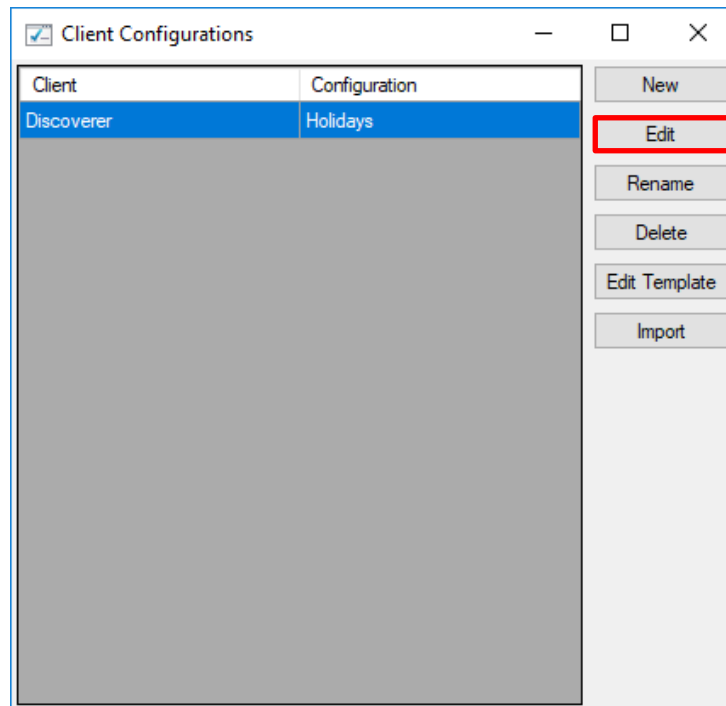
3. Click **OK** on the Web Service Chooser dialogue box



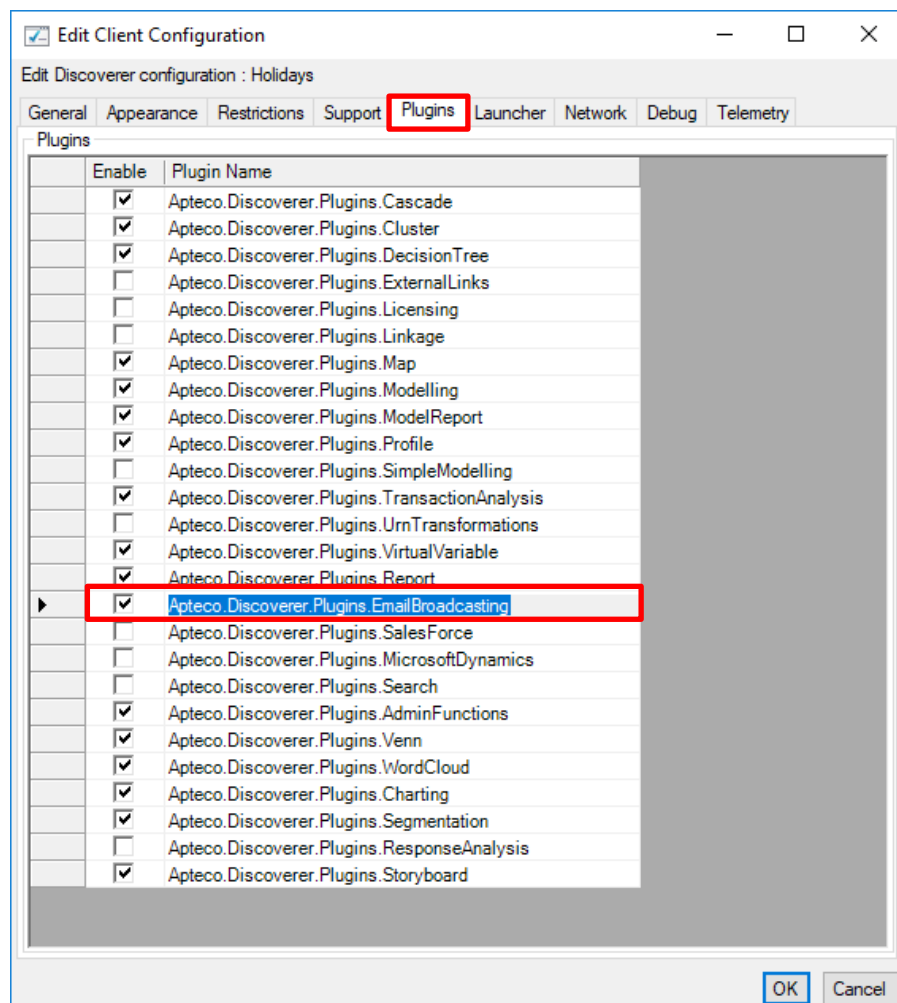
4. Click **Client Configuration**



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

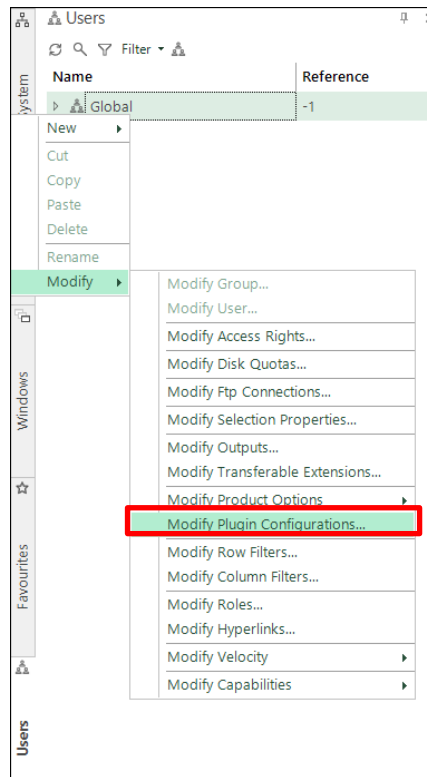


6. On the Plugins tab ensure the **Apteco.Discoverer.Plugins.EmailBroadcasting** check box is selected then click **OK**

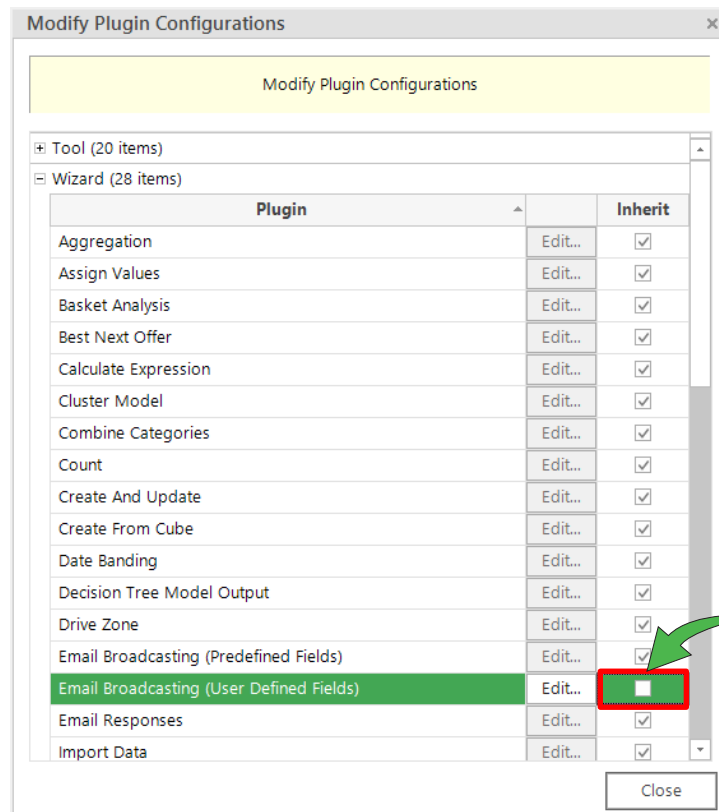


4.2 Configuration in FastStats

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



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



Clear

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

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

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

Name

- Buttons: (highlighted), ,

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

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

- Name:
- Resolve Table: (highlighted)
- Extras:
- Broadcaster: (highlighted)
- Known Parameters:

Account	*
Api Key	*
Secret	*

 (highlighted with a red box and a green checkmark)
- Additional Parameters:

Key	Value
*	
- Parameters:
- Buttons: ,

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

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

Table 4 – Edit Template Known Parameters Settings

Parameter	Settings to use
Account (Reqd) ①	This is your Emarsys account name which you get from Emarsys
API Key (Reqd) ②	This is your Emarsys API Key which you get from Emarsys
Secret (Reqd) ③	This is your Emarsys API Secret which you get from Emarsys
Uri	https://api.emarsys.net/api/v2/
Escher Sign Request	
Email Field Name	
SMS Field Name	
Urn Field Name	Urn
Append Email to Urn	
Message Period	
Message Status	1
Language Code	en
Encoding	Use UTF8
Use Dated List	Selected (default)

Note:

The Emarsys ①**Account**, ②**API Key** and ③**Secret** can be obtained from Emarsys

Note:

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

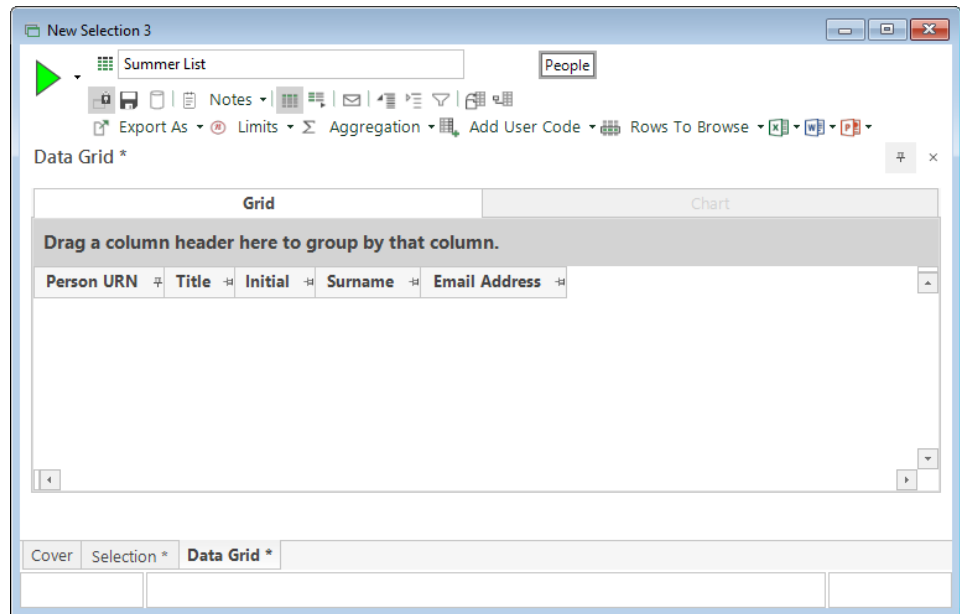
4.3 Checking your configuration

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.

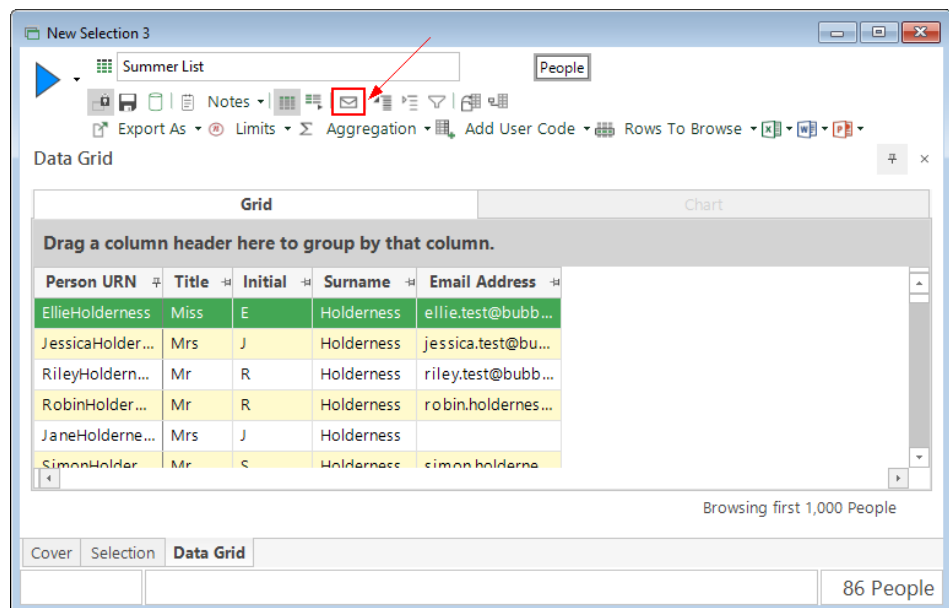
Note:

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

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



2. Click the **Email Broadcasting** icon

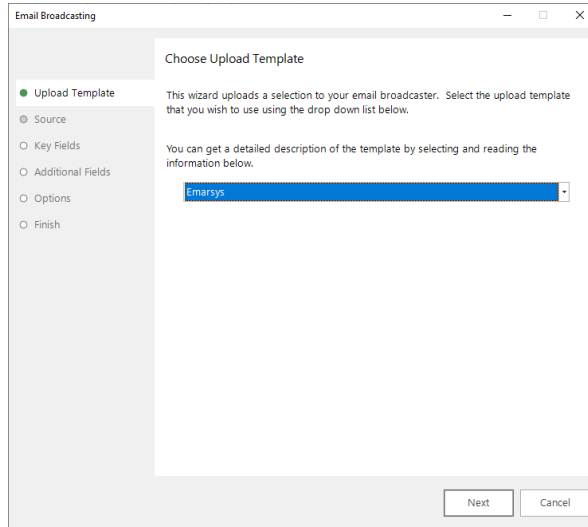


The **Email Broadcasting Wizard** opens

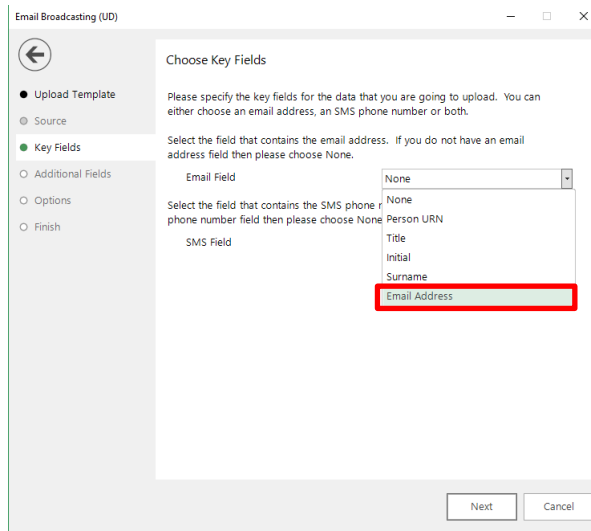
3. Choose the **Emarsys** template from the drop-down list and click **Next**

Note:

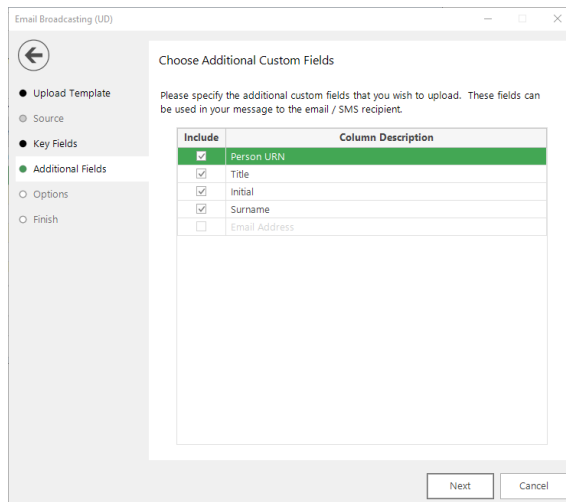
The wizard will omit this step if you have only one Upload Template



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**

Email Broadcasting Details

Please enter your credentials for uploading your records to the broadcaster.

Username

Password

Enter the details for this list. If you want to overwrite an existing list, ensure that you check the overwrite box.

List Name

Overwrite an existing list

Message Name

A copy of the list will be saved to the directory below.

When the list has been processed and is ready, the broadcaster will send a confirmation email to the address below.

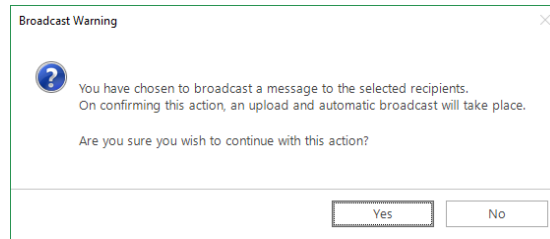
Email Address

Table 5– EmailResponseGatherer.exe.config Settings

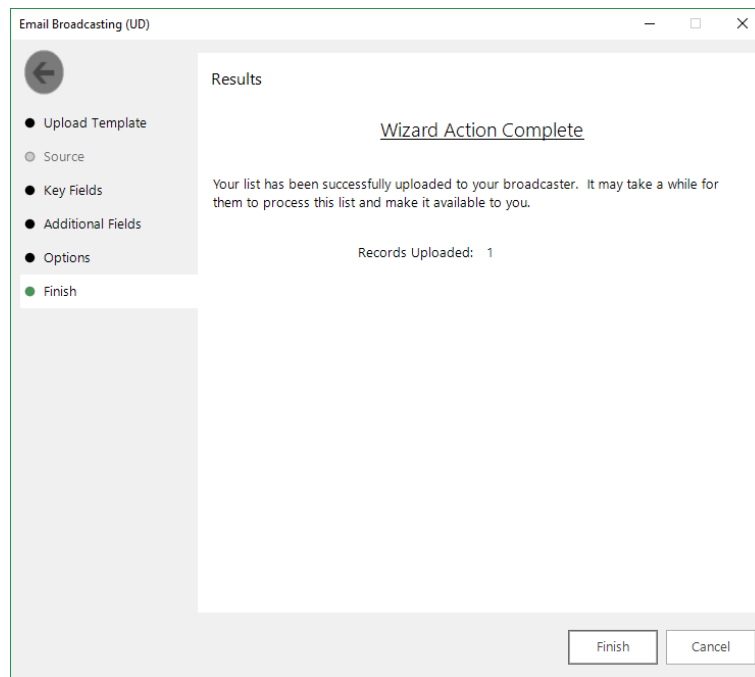
Option	Settings to use
Username	Your Emarsys FTP username
Password	Your Emarsys FTP password
List Name drop-down	Click on the List Name retrieve button and select a list from the drop-down (this appends any new records to the list) or enter a new List Name
Message Name	Click on the Message Name retrieve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

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

Click **Yes** to commit this action



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

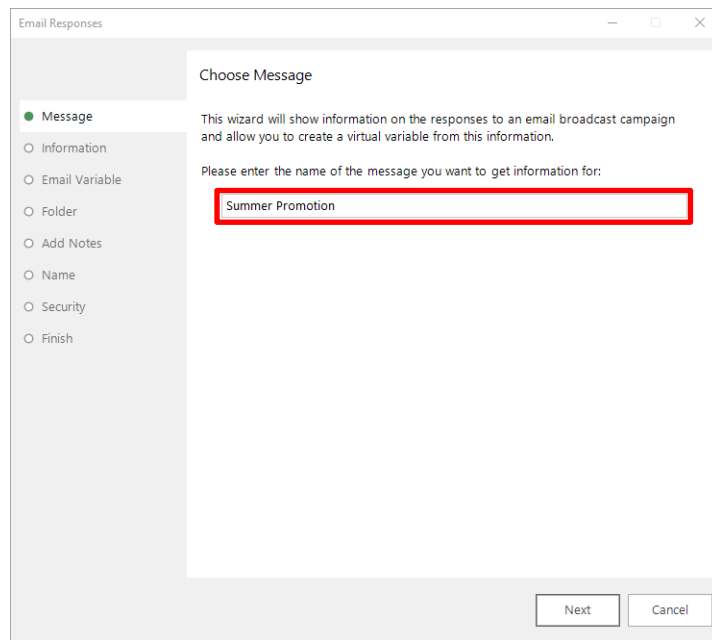


Note:
You will need to exit out of FastStats and log in again for these changes to take effect.

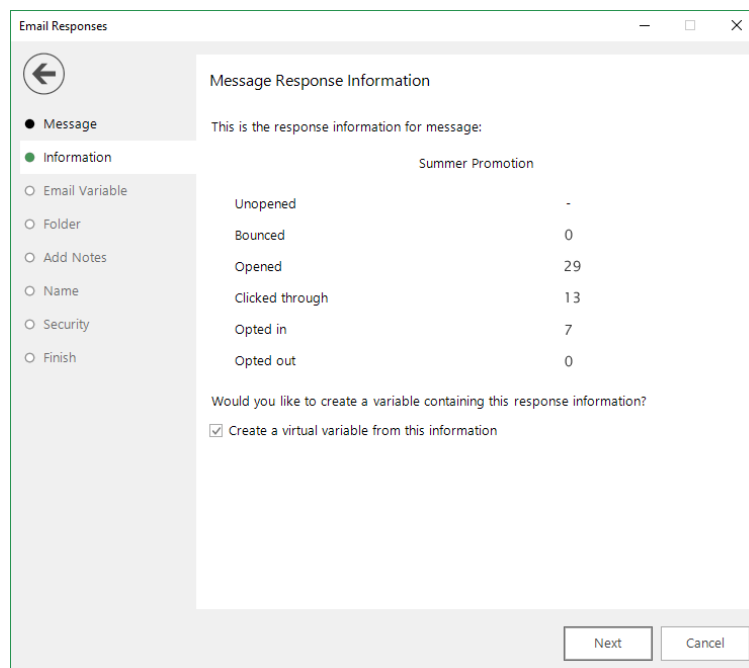
4.4 Email Responses Wizard

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

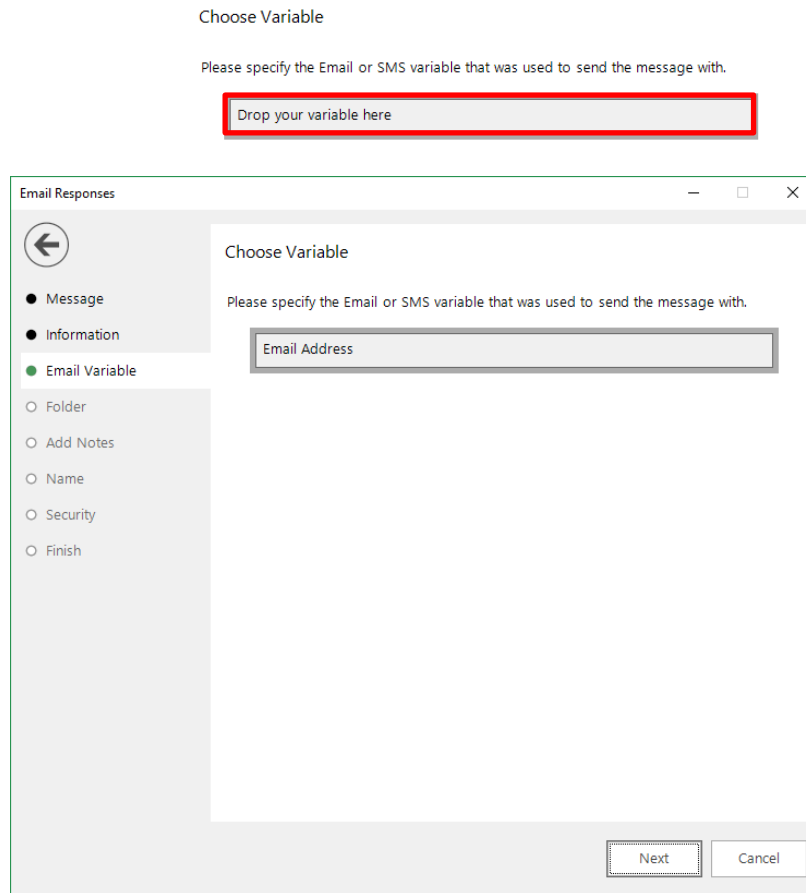
1. Open the **Email Responses** wizard
2. Enter the name of the message that you used in the Email Broadcasting wizard and click **Next**



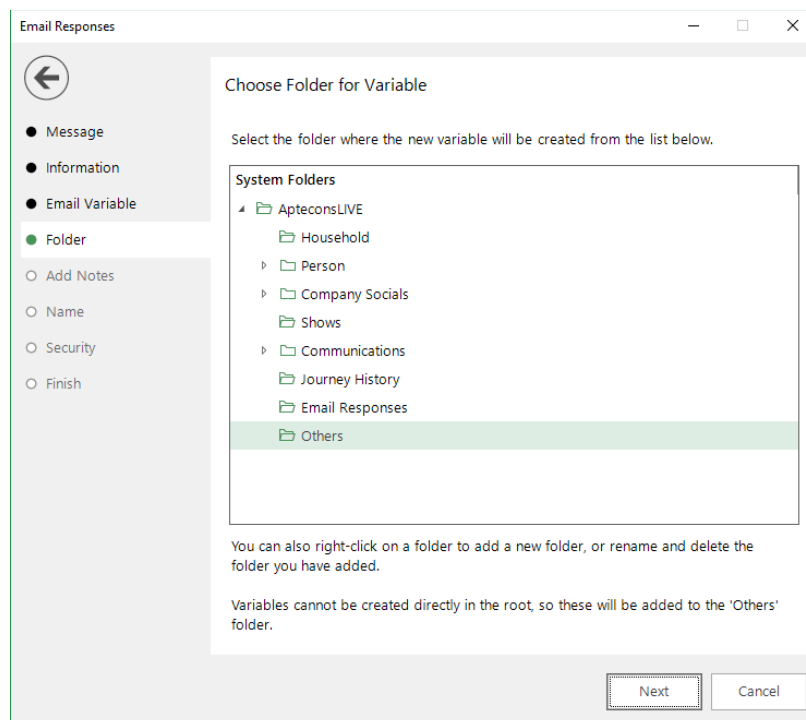
3. As the Email Response Gatherer starts collecting information from Emarsys, you will see how customers are interacting with your broadcast. If you want to analyse this information further, click on Create a virtual variable from this information and then click Next



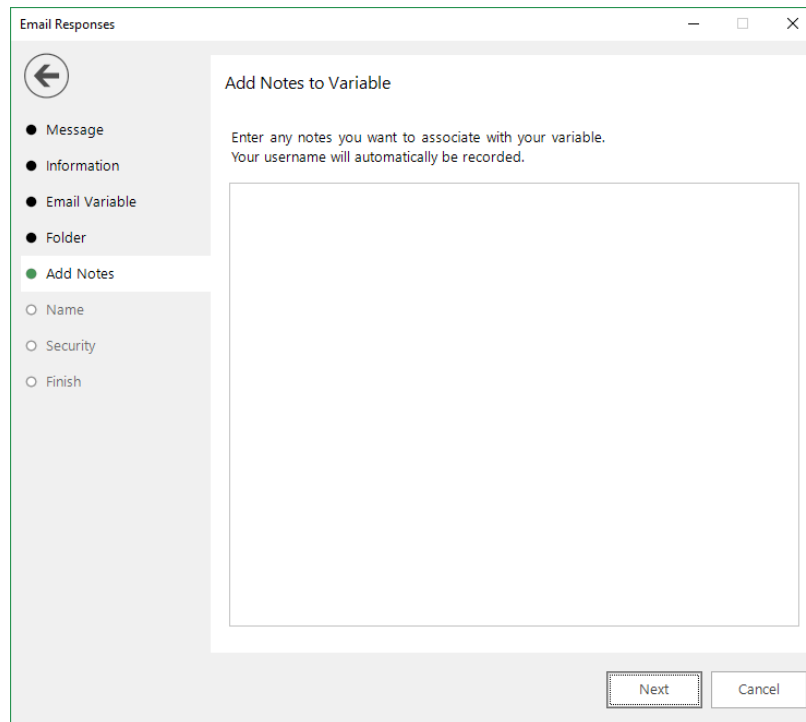
4. Drag the Email variable that you used in the Email Broadcasting wizard onto the drop box and click **Next**



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

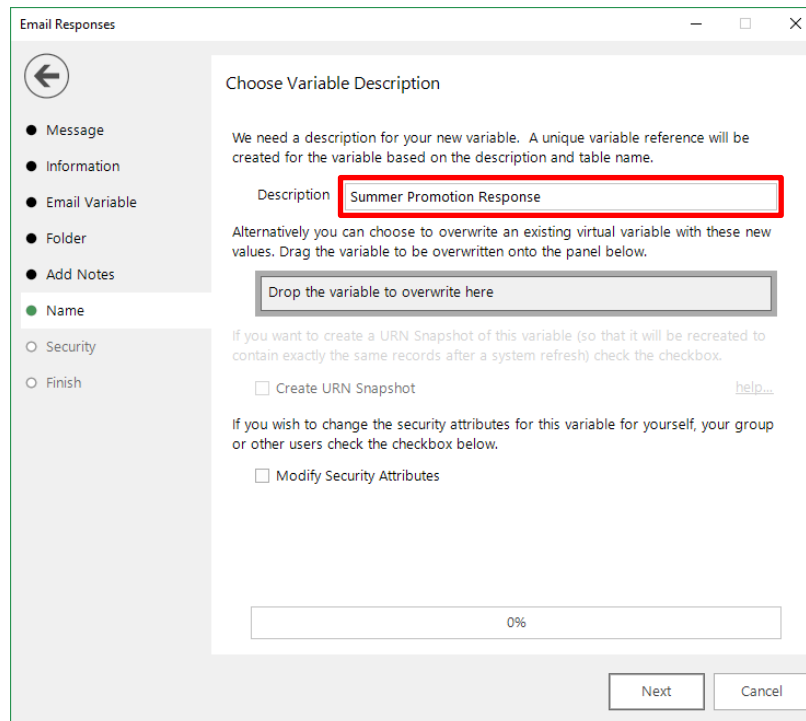


6. Enter any notes that will be stored along with the virtual variable and click **Next**



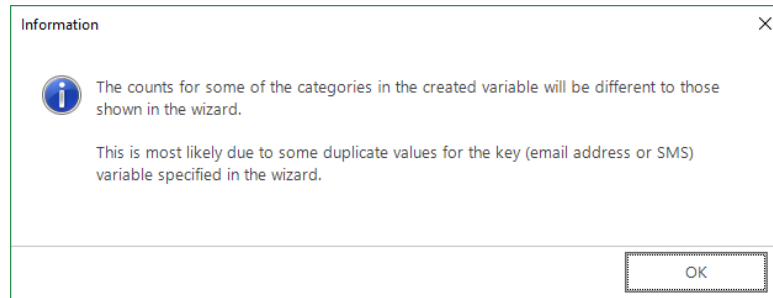
The screenshot shows a dialog box titled "Email Responses" with a sub-header "Add Notes to Variable". On the left is a navigation menu with options: Message, Information, Email Variable, Folder, Add Notes (selected), Name, Security, and Finish. The main area contains the text: "Enter any notes you want to associate with your variable. Your username will automatically be recorded." Below this is a large empty text area. At the bottom right 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**

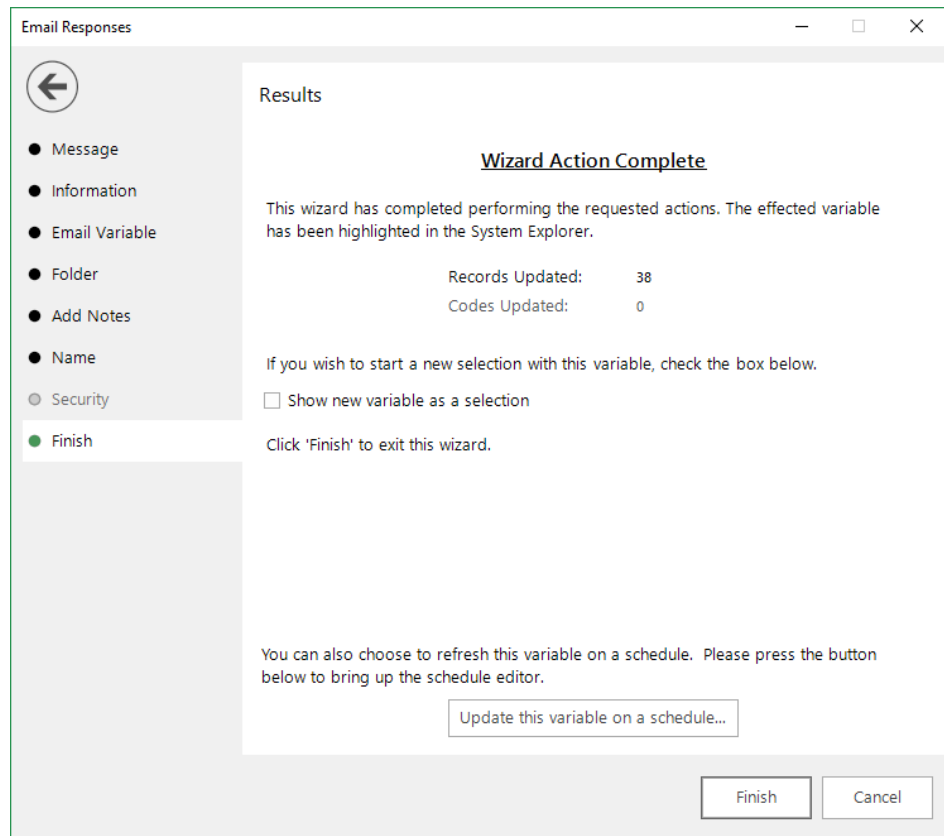


The screenshot shows a dialog box titled "Email Responses" with a sub-header "Choose Variable Description". The left navigation menu is the same as in the previous screenshot, but "Name" is now selected. The main area contains the text: "We need a description for your new variable. A unique variable reference will be created for the variable based on the description and table name." Below this is a text input field with "Summer Promotion Response" entered and highlighted with a red box. Further down is a grey box labeled "Drop the variable to overwrite here". At the bottom are checkboxes for "Create URN Snapshot" (with a "help..." link) and "Modify Security Attributes". A progress bar at the bottom shows "0%". "Next" and "Cancel" buttons are at the bottom right.

8. Click **OK**



9. Click **Finish**

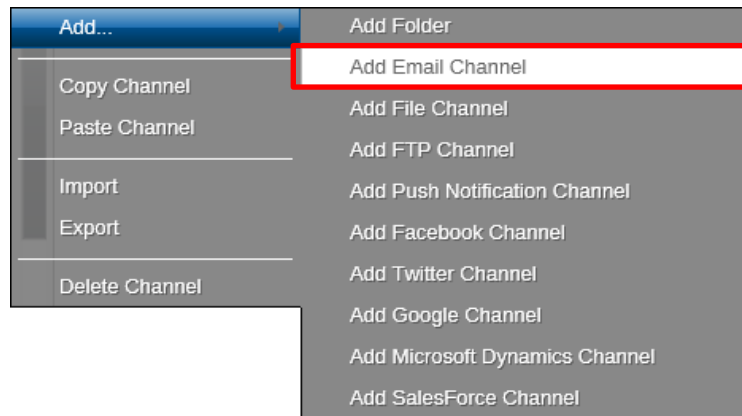


5 PeopleStage Broadcasting & Responses

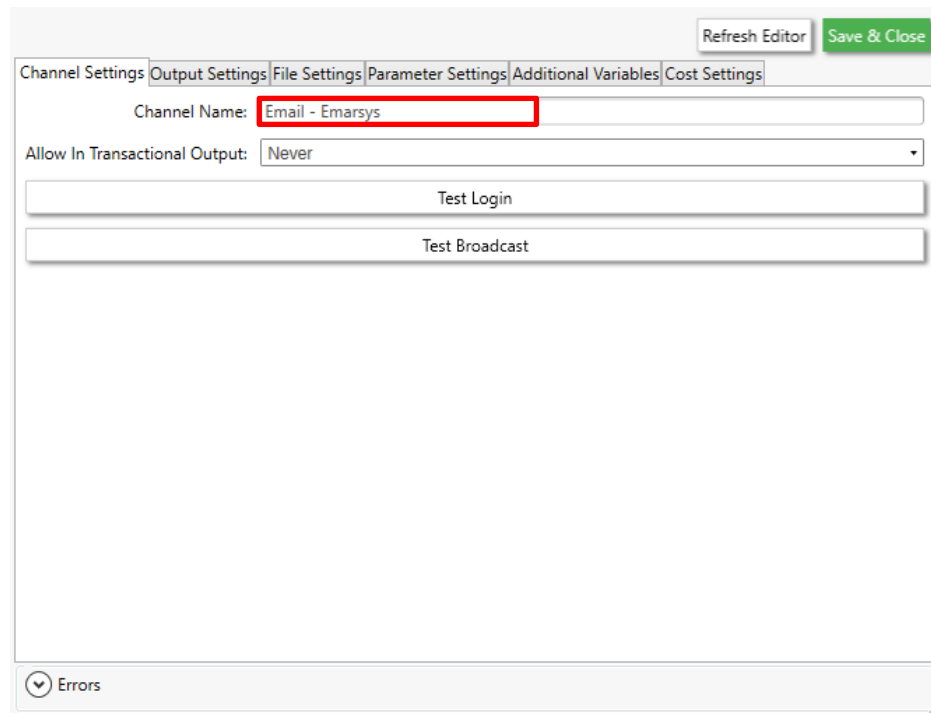
5.1 Defining the Broadcast Channel in PeopleStage

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

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 Emarsys

Table 6 –PeopleStage Output Settings

Field	Settings
Broadcaster	Select Emarsys from the drop-down
Username	Enter your Emarsys FTP Username
Password	Enter your Emarsys FTP Password
Variable Name	Select Email Address from the drop-down
Variable Description Override	Enter the description, for example, “Email” Note: This must correspond to the e-mail field within Emarsys
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 Email with Broadcast Id	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 Email with Broadcast Id for Emarsys.
Message Content Type Broadcaster Template	Only Dynmark has the ability to use PeopleStage templates so this will always be Broadcaster Template . This is where the creative comes from.

Note:

The Emarsys FTP **Username** and **Password** can be obtained from Emarsys

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. Use **utf-8** here.

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

Parameter Name	Parameter Value
Account	EmarsysAccountName
Api Key	EmarsysAPIKey
Secret	EmarsysSecret
Uri	https://api.emarsys.net/api/v2/
Urn Field Name	Urn
Message Status	1
Encoding	UTF8

Account=Enhance_apteco;ApiKey=Enhance_apteco002;Secret=LkzihUacaGjZ34yCR24r;Uri=https://api.emarsys.net/api/v2/

Table 7 –Example PeopleStage Parameter Settings

Field	Settings
	*Example, these will be specific to your account
Account	Emarsys ①Account
Api Key	Emarsys ②API Key
Secret	Emarsys ③Secret
Uri	https://api.emarsys.net/api/v2/
Urn Field Name	Urn
Message Status	1
Encoding	UTF8

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

Note:

The Emarsys ①**Account**, ②**API Key** and ③**Secret** can be obtained from Emarsys

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:

Errors

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

Note:

Use the variable description column to override and match the Variable Name to the name used for that parameter in Emarsys.

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 blanks
> Forename (PeForena)	First Name	-	No Formatting	-
Surname (PeSurnam)		-	No Formatting	-
Click here to add new item				

Add Additional Variables Directly

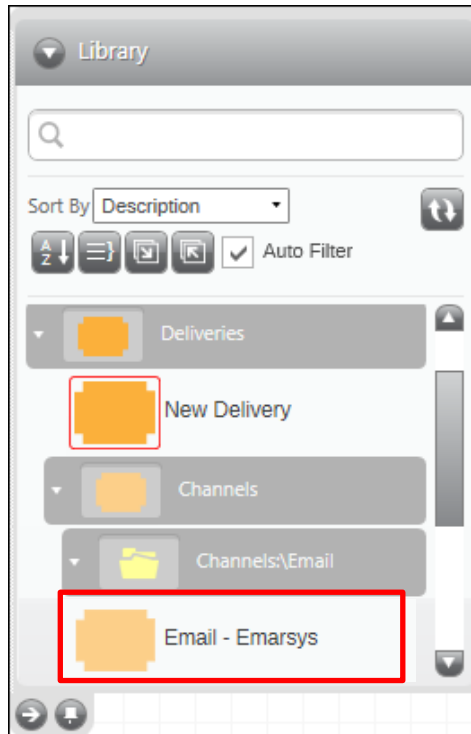
Additional Variables Location:

Errors

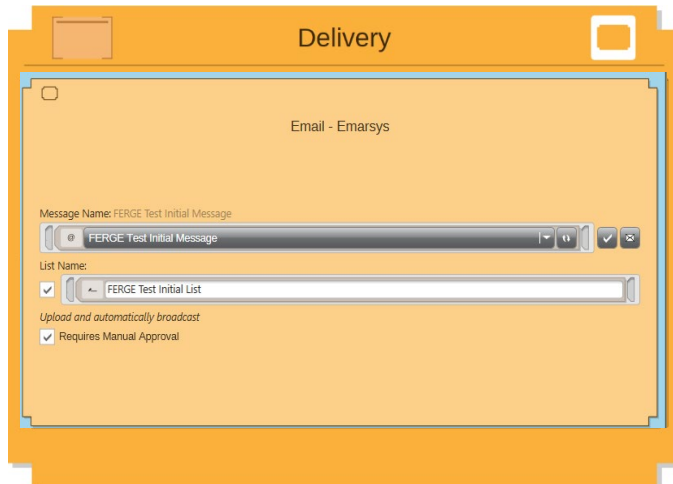
5.2 Broadcasting in PeopleStage

You can now test your channel at any Delivery Stage

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



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

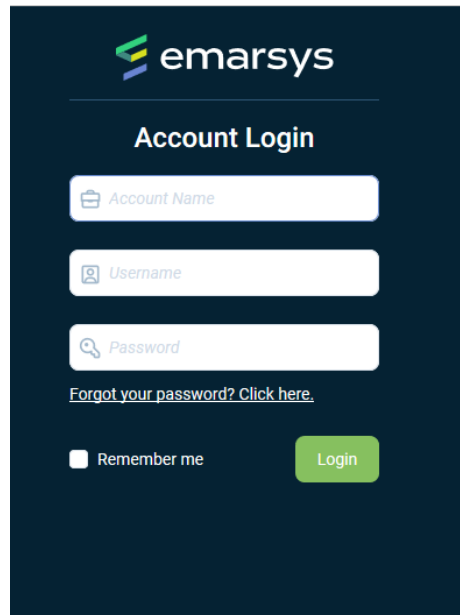
FastStats or PeopleStage uploads a list of subscribers and insert them into the Emarsys List

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 Emarsys.

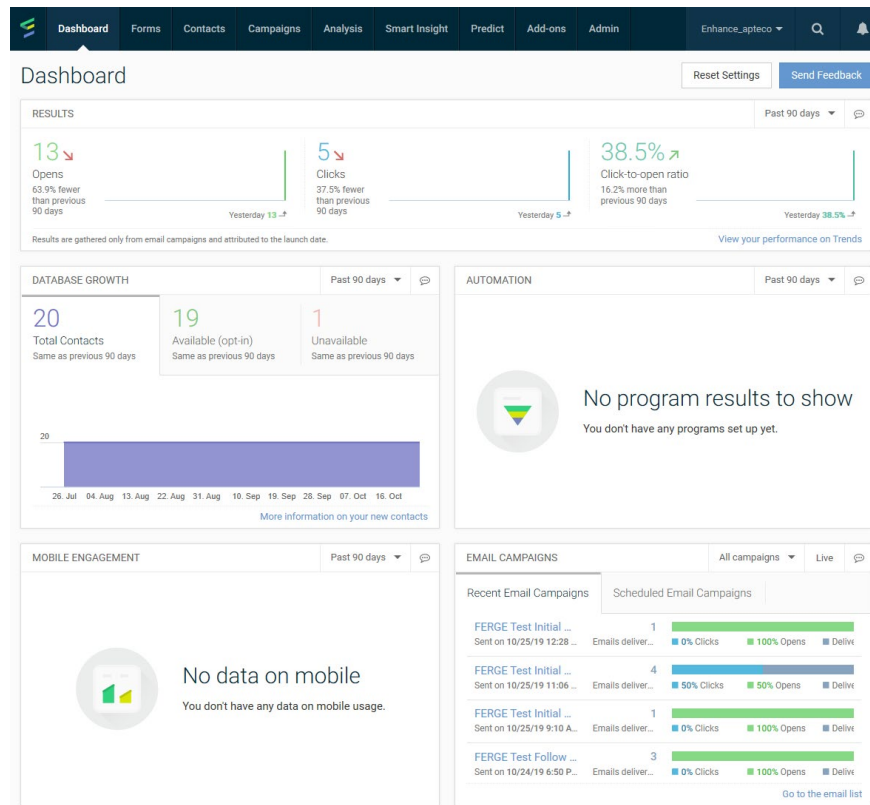
Note:

This section is not a detailed guide on using Emarsys, your Client ID and other credentials are provided by Emarsys during the signup process, for more information on using Emarsys please contact Emarsys

1. Login to your Emarsys account to access the web-based control panel using the account specific URL provided by Emarsys



2. The Emarsys dashboard opens



Creating a new Message in Emarsys

If this is your first time using Emarsys, you must create a Contact List and an Email (Campaign),

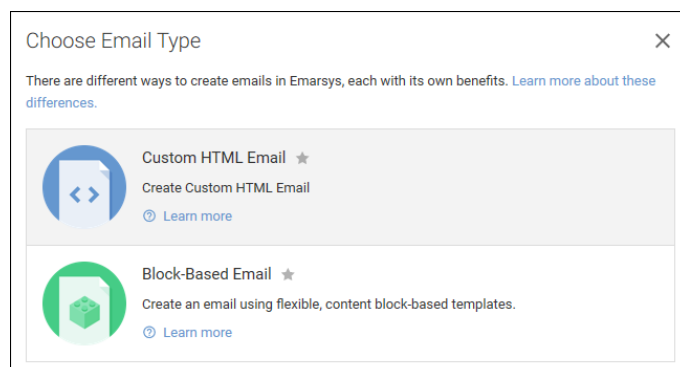
- From Contacts > Contact Lists either click **Create Contact List** you do not need to add subscribers as FastStats or PeopleStage uploads a list of subscribers.

You need to create a Campaign Email (Message) to use in FastStats or PeopleStage.

- From Campaigns > Email Campaigns click **Create Email** step through the wizard to create a basic email and assign it to a Contact List

Note:

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



Dashboard Forms Contacts **Campaigns** Analysis Smart Insight Predict Add-ons Admin Enhance_apteco

New Email 2019-10-25 12:48

Save Go to Overview

General settings

Email name *
Beach Promo

Language *
english

Email category
 No category
 Enter a new category name
 Send text-only

Recipient source

Recipient source
Using a contact list

List
FERGE Test Initial List_20191024-142314

Exclude
-- choose a recipient source to exclude --
 Do not send to duplicate email addresses

Previous Step **1 Email Settings** 2 Content Creation 3 Inbox Preview 4 Scheduling Next Step

Dashboard Forms Contacts **Campaigns** Analysis Smart Insight Predict Add-ons Admin Enhance_apteco

Beach Promo

Switch to the new editor Deliverability Advisor Preview Alternative Text Save Go to Overview

Create A/B testing versions Testmail

Sender information


From (name) *
Apteco

From (email address) *
 Use Emarsys reply mail management
 aptive@eemms.net Create New
 Handle reply mails outside Emarsys
 aptive@eemms.net

Subject line *
Fancy a Break Subject Checker

HTML Version Text Version Auto Track HTML Check for trackable links on save

Arial small B I U



FERGE Follow Up Message - Emarsys

Hello \$First Name\$,

The follow up send seems to be working ok too and it looks like \$FERGEContent\$.

This message was sent to you using a communication key of \$Communication Key\$ on run number \$Run Number\$.


Unsubscribe

Previous Step **1 Email Settings** **2 Content Creation** 3 Inbox Preview 4 Scheduling Next Step


Dashboard Forms Contacts **Campaigns** Analysis Smart Insight Predict Add-ons Admin Enhance_apteco 🔍 🔔

Beach Promo Go to Overview

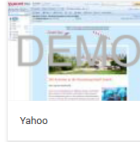
🔔 You have not yet run any tests for this email. [Run Test](#)




Outlook 2003



Gmail



Yahoo



AOL Mail

Payment Plan

You are currently using our free-of-charge service, you can generate previews for Outlook 2003 and Gmail clients only.

To see how your email will be displayed in all other available clients, please contact Emarsys Support to enable our premiere service.

← Previous Step
1 Email Settings
2 Content Creation
3 Inbox Preview
4 Scheduling
Next Step →

Dashboard Forms Contacts **Campaigns** Analysis Smart Insight Predict Add-ons Admin Enhance_apteco 🔍 🔔

Beach Promo Go to Overview

🔔 No campaign has been launched or scheduled. Advanced Scheduling


Launch Details

Original target Contact list: FERGE Test Initial List_20191024-142314	7
Opted out	0
Estimated recipients	7

Use Send Time Optimization

Launch now
 Launch at

[Launch Later](#)



7

- Opted out
- Estimated recipients

← Previous Step
1 Email Settings
2 Content Creation
3 Inbox Preview
4 Scheduling
Next Step →

Appendix B: API Parameters

Table 8 – Email Response Gatherer Parameters

Parameter	Reqd.	Default	Description
ACCOUNT	Y	①	This is your Emarsys account name which you get from Emarsys
APIKEY	Y	②	This is your Emarsys API Key which you get from Emarsys
SECRET	Y	③	This is your Emarsys API Secret which you get from Emarsys
EMAILCOLUMNNAME	N	Email	This should refer to the column in the Emarsys extract file that holds the email address. The value will get inserted into the Email field in the Response table.
URNCOLUMNNAME	N	Urn	This should refer to the column in the Emarsys extract file that holds the FastStats Urn. This will only be available if it has been originally uploaded from FastStats. The value will get inserted into the Urn field in the Response table
TYPECOLUMNNAME	N	Source	Response type
MESSAGENAMECOLUMNNAME	N	(Campaign title)	The message name is not returned in the Emarsys extract file, but a reference is, this should typically be left as the default value
DELIVERYDATECOLUMNNAME	N	Time	Delivery date
CLICKURLCOLUMNNAME	N	Url	This should refer to the column in the Emarsys extract file that holds the name of the url that was clicked. This value will get inserted into the ClickUrl field in the Response table.
CLICKDATECOLUMNNAME	N	Time	This should refer to the column in the Emarsys extract file that holds the date the link was clicked
DATEOFFSET	N	0	
EVENTTRIGGERDATECOLUMNNAME	N	Time	This should refer to the column in the Emarsys extract file that holds the date the response occurred
URL	Y		The Emarsys log in URL that you use to access your account. E.g. *https://suite7.emarsys.net/api/v2/
DISTRIBUTIONMETHOD	N	Local	The method to gather responses from Emarsys. Option of 'ftp' or 'local'. Default 'local'. If 'ftp', the values FTPHost, FTPProtocol, FTPPort, FTPUsername and FTPPassword are required.

MAXRETRIES	N	30	This value refers to the number of times the Email Response Gatherer will make the api request when Emarsys server return errors, e.g. 'Cannot run filters that often'(error code 6028), 'The requested data is currently generated'(6030) or 'An export with the same setting is currently running'(4001). This parameter is used with WAITIMESECONDS
WAITIMESECONDS	N	10	This value refers to the number of seconds the Email Response Gatherer will wait to retry the same api request when it fails. This parameter is used with MAXRETRIES.
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.
DATEFORMAT	N	dd.MM.yyyy HH:mm	Date format used e.g. dd.MM.yyyy HH:mm
CONSTANTFIELDS	N		Pipe delimited field of key value constants, seperated by # e.g. Broadcaster#Emarsys\System#SystemName where SystemName is your SystemName

Table 9. The following data is inserted into the FastStats Email Response Table

	Required	Response Table field	Emarsys extract file column
COMMUNICATIONKEYCOLUMNNAME	N	CommunicationKey	FastStats Communication Key. Only be available if it has been previously uploaded from FastStats
SENDIDCOLUMNNAME	N	(Campaign ID)	Reserved for future use
TYPECOLUMNNAME	N	MessageType	Response type
ADDITIONALFIELDS	N		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
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	1M	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.
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).
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.

RECEIVERPAGESIZE	N	5000	The page size of receiver's data to return when calling apis GET /v2/reports.json/{id}/receivers and GET /v2/groups.json/{group_id}/receivers. Maximum 5000.
REMOVEFILES	N	true	
RESPONSEENDDATE	N		A specific date and time to when you wish to retrieve responses to in the format you specify (using DATEFORMAT).
RESPONSEPERIOD	N	7D	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.
RESPONSESTARTDATE	N		A specific date and time from when you wish to retrieve responses from in the format you specify (using DATEFORMAT).

Table 10 – Email Broadcasting Parameters

Parameter	Required Y/N	Default	Description
Account (Reqd)	Y	①	This is your Emarsys account name which you get from Emarsys
API Key (Reqd)	Y	②	This is your Emarsys API Key which you get from Emarsys
Secret (Reqd)	Y	③	This is your Emarsys API Secret which you get from Emarsys
Add External Id	Y		Selected (default)
Use Dated List	Y		Selected (default)
Dated List Format	Y		yyyyMMdd-HHmms
From Email			Optional. Enter the from email address for your message, leave blank to use the from email address in the Emarsys Message template.
Upload Empty Lists	Y	true	Selected (default)
Encoding	Y		Use UTF8

Note:

The Emarsys ①**Account**, ②**API Key** and ③**Secret** can be obtained from Emarsys

Appendix C: Example Batch File

Example batch file to use with FERG and scheduling

```
@echo off
```

```
REM *****
```

```
REM File Name: EmarsysBatchFile.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 *****
```

```
REM IMPORTANT Change the drive letter to match the drive you have created your FERG directory
```

```
C:
```

```
cd C:\FastStats\FERG
```

```
cls
```

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

```
SET LOGFILE="Logs\EmarSys.txt"
```

```
SET LOGFILEDETAILS="Logs\EmarSys_Details.txt"
```

```
echo. >> %LOGFILE%
```

```
echo. >> %LOGFILEDETAILS%
```

```
echo %date% %time% - Starting FastStats EmarSys Response Download >> %LOGFILE%
```

```
echo %date% %time% - Starting FastStats EmarSys Response Download >> %LOGFILEDETAILS%
```

```
echo. >> %LOGFILE%
```

```
>> %LOGFILEDETAILS%
```

```
echo.
```

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

goto Complete

:FailedLogin

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

goto Complete

:FailedDownload

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

goto Complete

:FailedLogout

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

goto Complete

:FailedException

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

goto Complete

:Complete

echo %date% %time% - Completed FastStats EmarSys 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\EmarSys.xml'.

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

```
%FERG% EmarSys.xml >> %LOGFILEDETAILS%
```

In the location:

“cd D:\FastStats\FERG” in the batch file

Solution: Ensure the file exists or change the filename in the batch file to match.

Errors relating to running a campaign

These errors can occur due to

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