



Apteco

Technical Guide

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

CleverReach® Integrations Guide
D075T3X002 - 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 August 2019

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1 Introduction

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

Technology

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

Supported Integrations

CleverReach® supports all the above integration options.

Type of Integration – User Defined

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

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 CleverReach®
 - b. API Parameters

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

- Make a note of your Message and List names that you create in CleverReach
- Confirm the CleverReach URN and Email Address field names, these can be found in the Placeholder column in the List field dialogue
- Make a note of the parameter name/s in curly brackets used for personalisation in the message.

for example {Firstname} 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>;User Id=faststats_service;Password=fa5t5tat5;`
- The **Digital Integration.zip** available from:
<https://www.apteco.com/portal/software-releases>
- Decide where your **FERG folders** are to be created
Used to store the .xml and .bat files used when scheduling FERG
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

Note:

This guide follows the same structure as all our other integrations however you will need to **perform step 4.2 first** to obtain the **Access Token** as it is used in step 3.5 and 5.1

- The CleverReach® ①**Client Id**, ②**OAuth Client ID**, ③**OAuth Client Secret** and **Redirect Uri**. ④**Access Token** obtained in the FastStats Upload Template Edit Template form using parts 1,2, and 3 above. (The Redirect Uri is a web page that is loaded after obtaining the Access Token e.g. <https://www.domain.de>).
- The CleverReach® Web Client **Username** and **Password**
- The CleverReach® API **Username** and **Password**
- The CleverReach® **List Name** and **Message Name** that you have set up in the Web Client

Note:

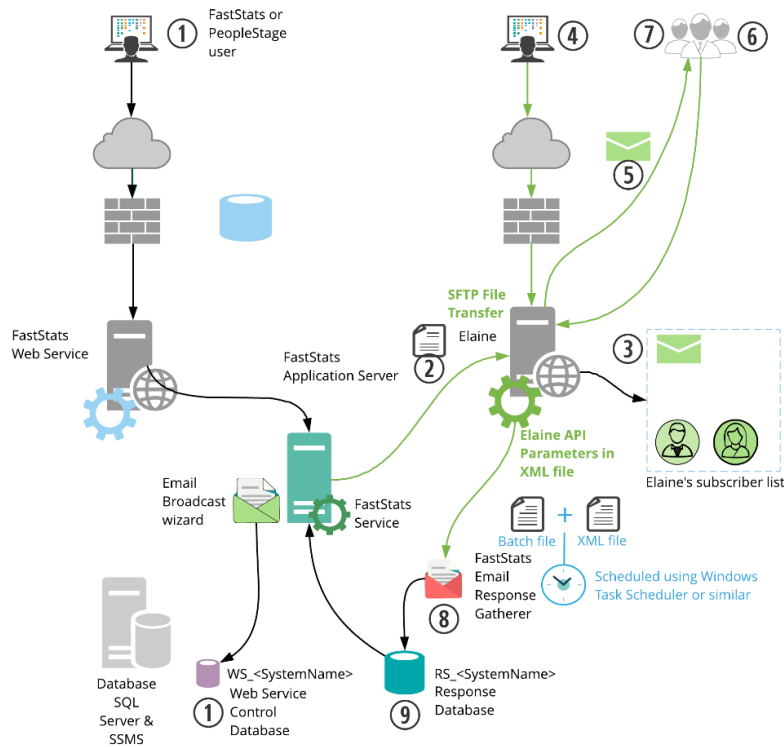
The CleverReach® **OAuth Client ID** and **OAuth Client Secret** can be obtained from Apteco support in Germany support@apteco.de, please see the back of this document for contact details

2 Process Summary

2.1 Architecture

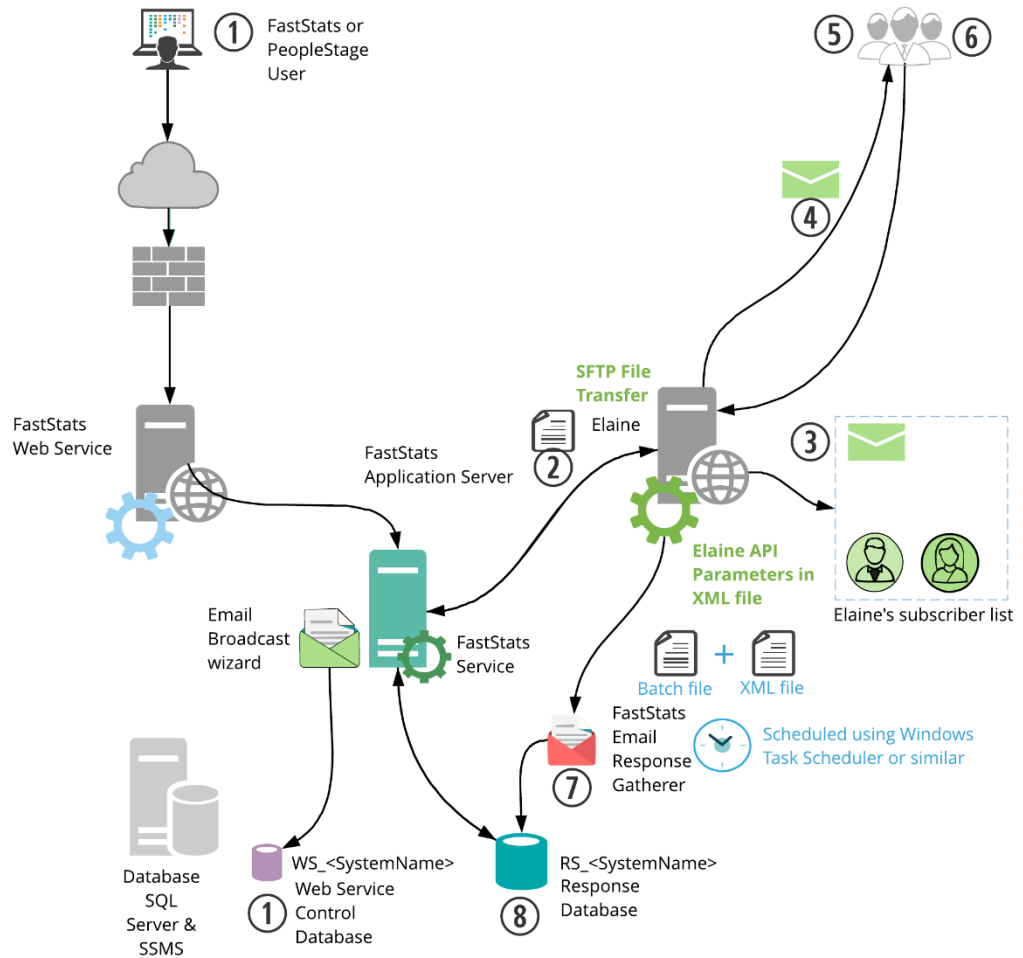
The following diagrams describe a typical process from FastStats to CleverReach®, to the customer and back to FastStats.

Schematic showing campaign scheduling performed in CleverReach®.



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 CleverReach® SFTP site and then uses RESTful communication to monitor the upload.
3. CleverReach® 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 CleverReach® web interface.
5. CleverReach® sends Messages to all recipients on the list.
6. CleverReach® records any undelivered messages.
7. CleverReach® 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 CleverReach® automatically, allowing full control of the campaign scheduling from within the Apteco Marketing Suite.

Note:
For the message to send automatically, you need to create a Message in CleverReach®.

3 Apteco System Configuration

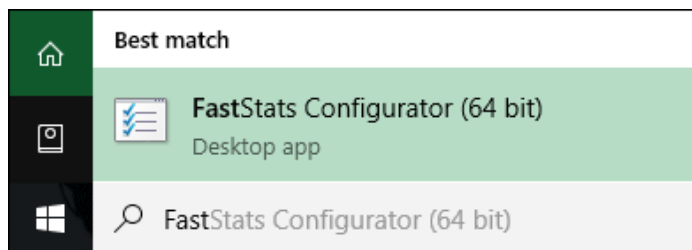
3.1 Creating the Response Database

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

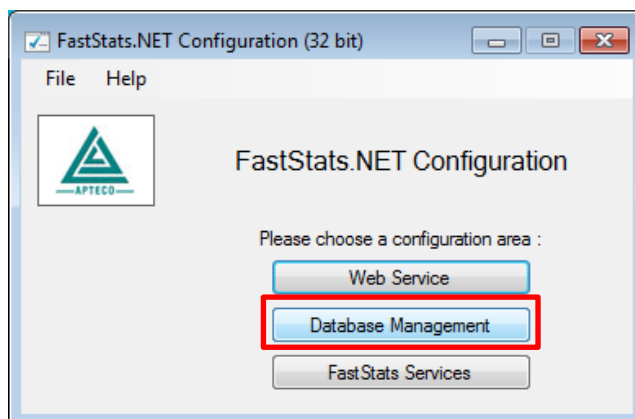
1. Open the FastStats Configurator.

Tip:

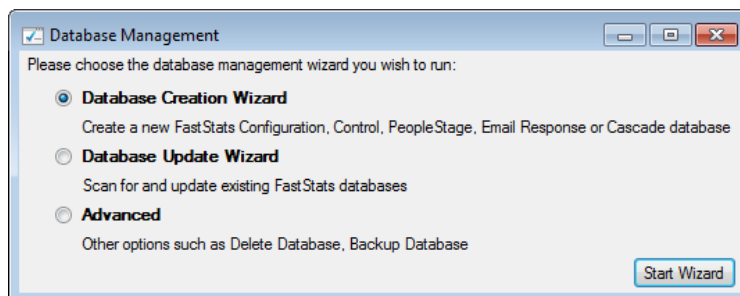
Search for Fast in the Start Menu



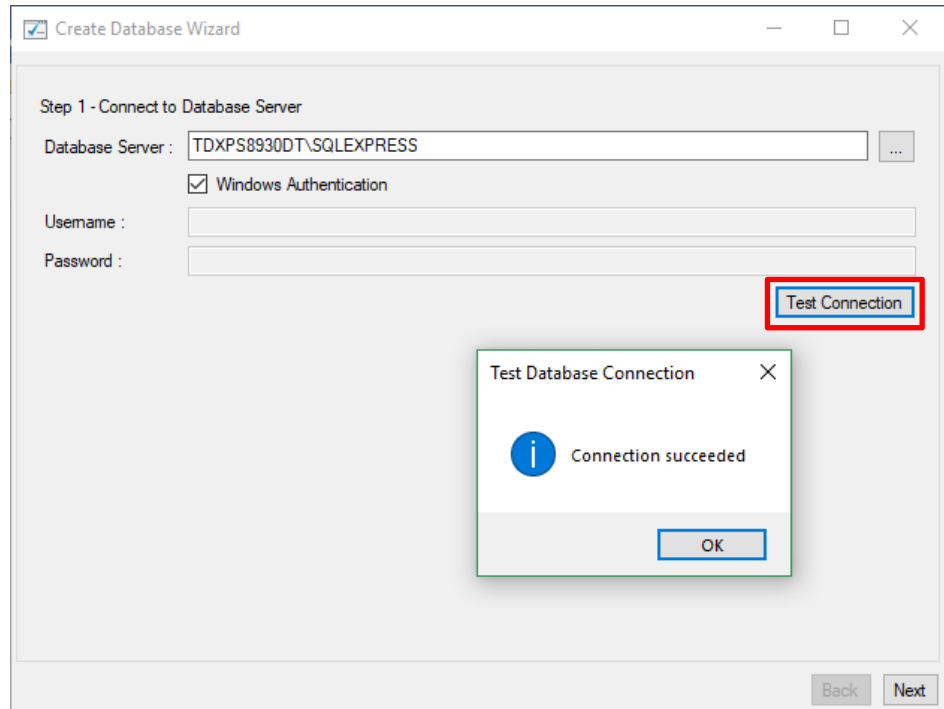
2. Select **Database Management**.



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



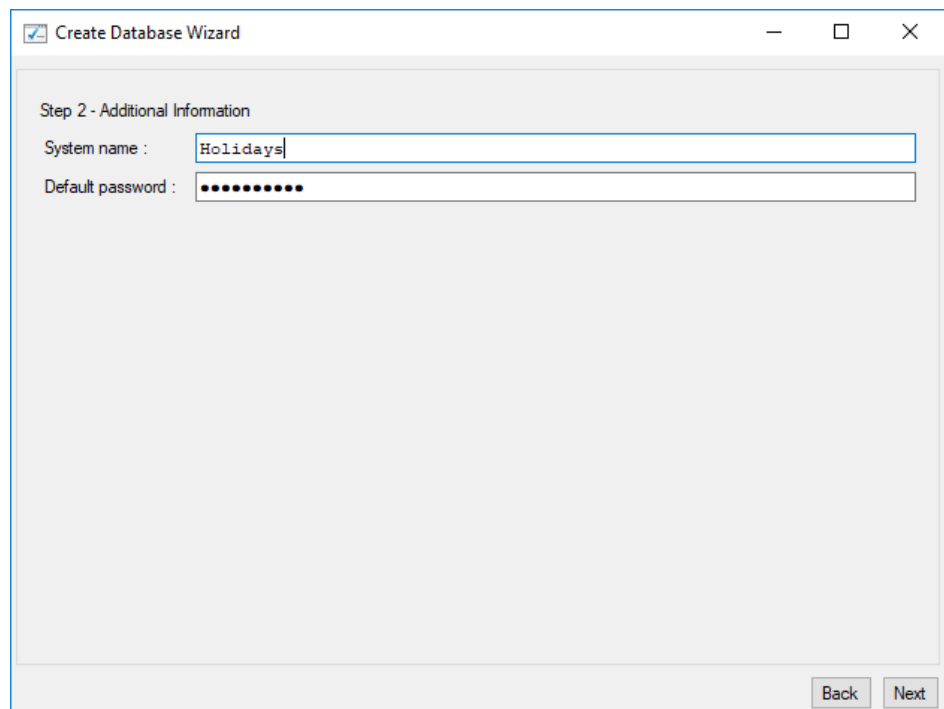
4. Enter the name of the **Database Server** where you wish to store the response database, click **Test Connection**



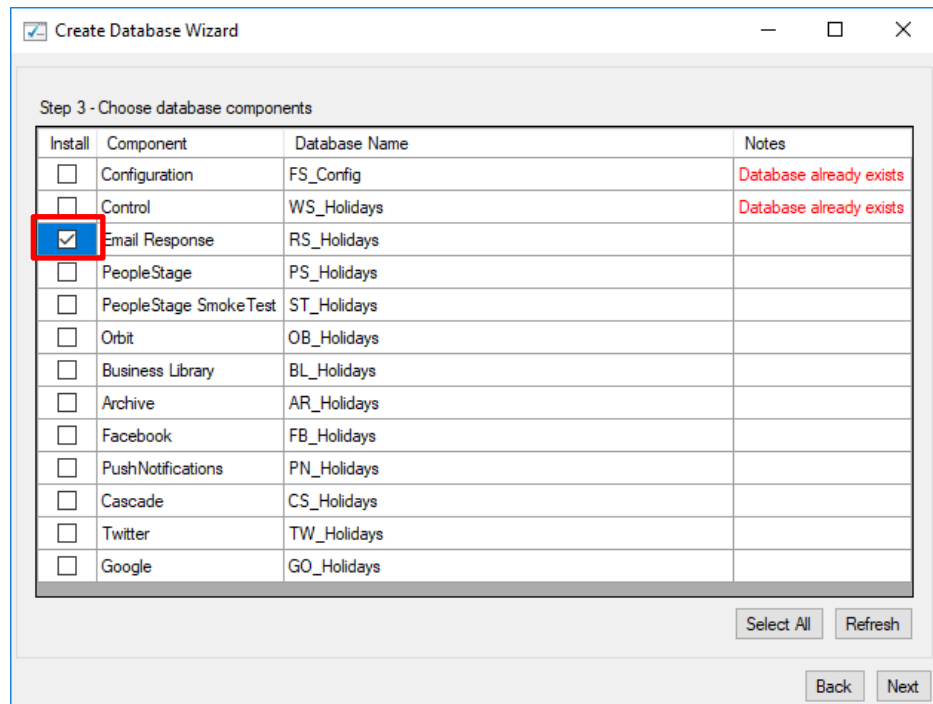
Note:

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.



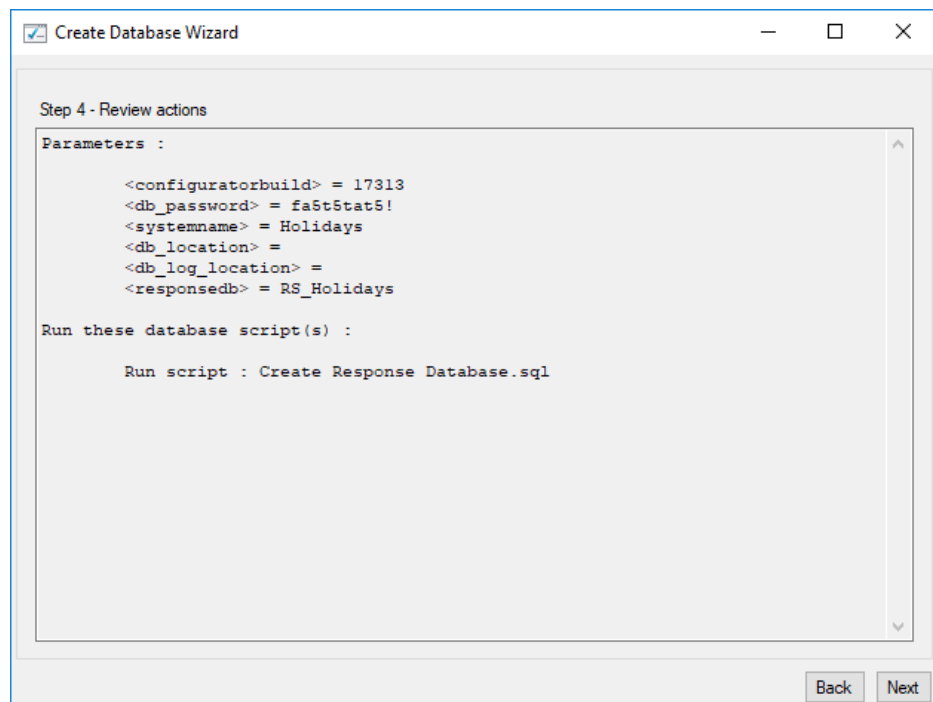
6. Select the **Email Response** check box, then click **Next**.

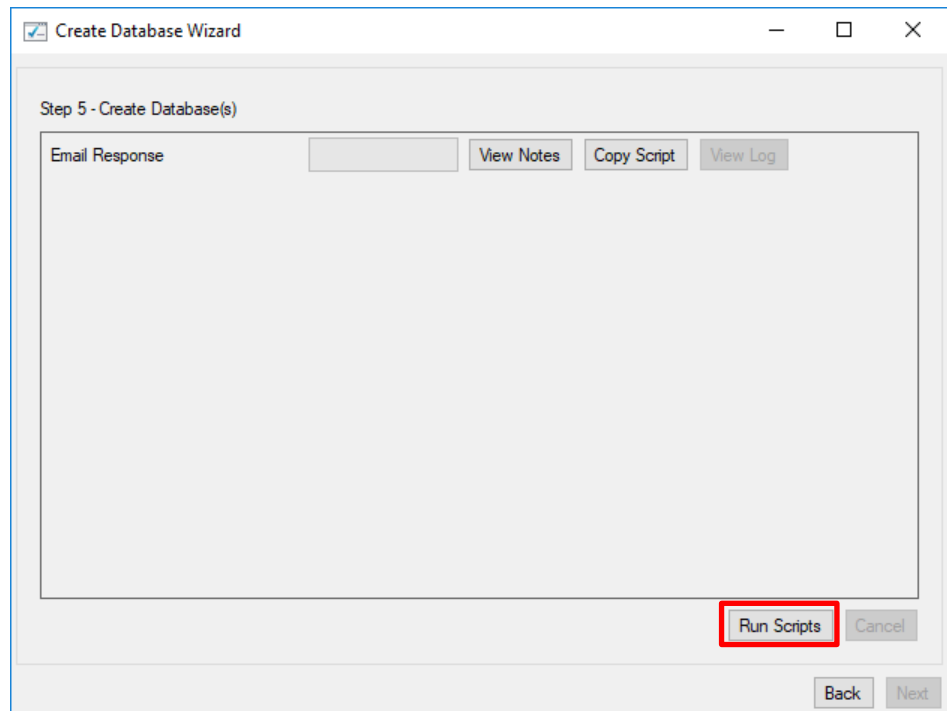
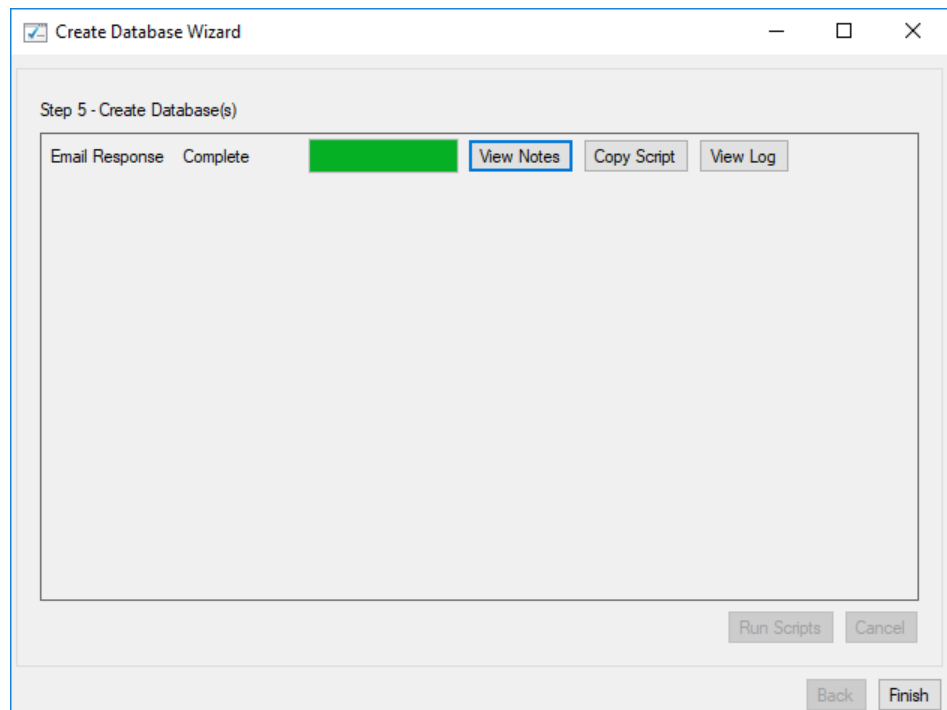


Note:

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.

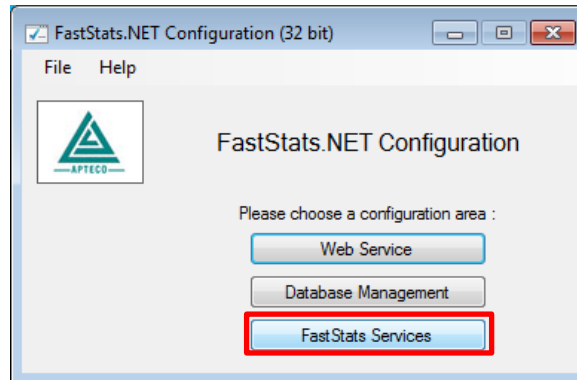


8. Click **Run Scripts**.9. Click **Finish**.

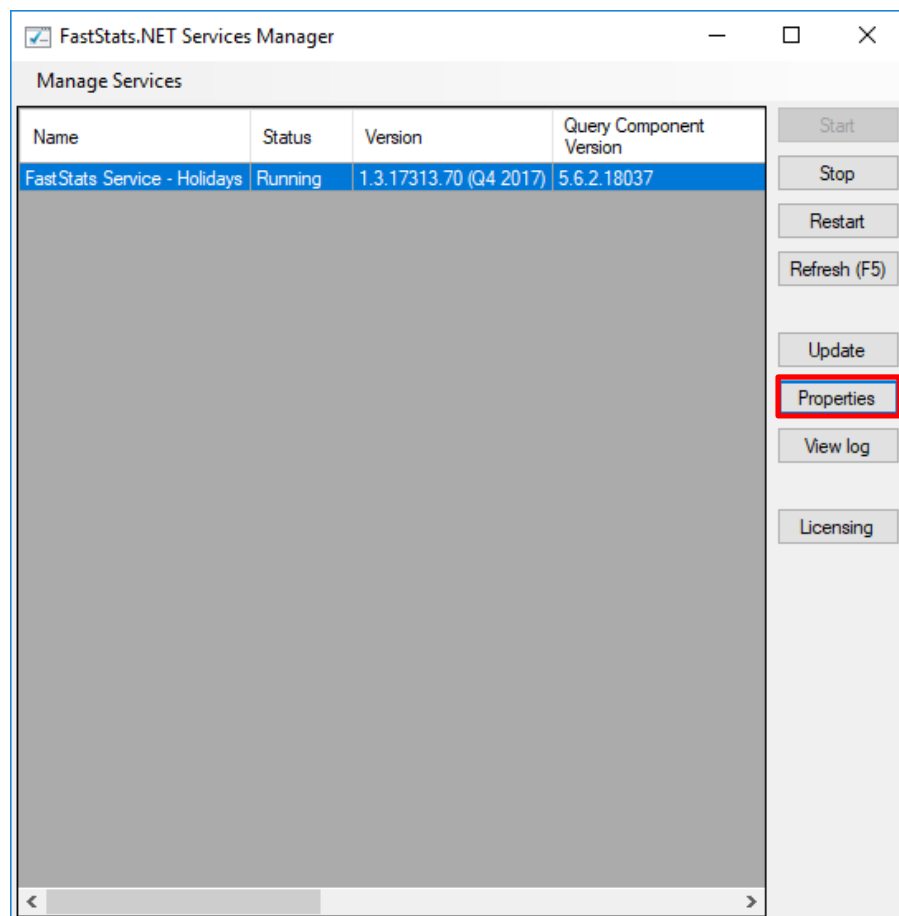
3.2 Linking the Response Database to the FastStats Service

You need link the response database to the FastStats service.

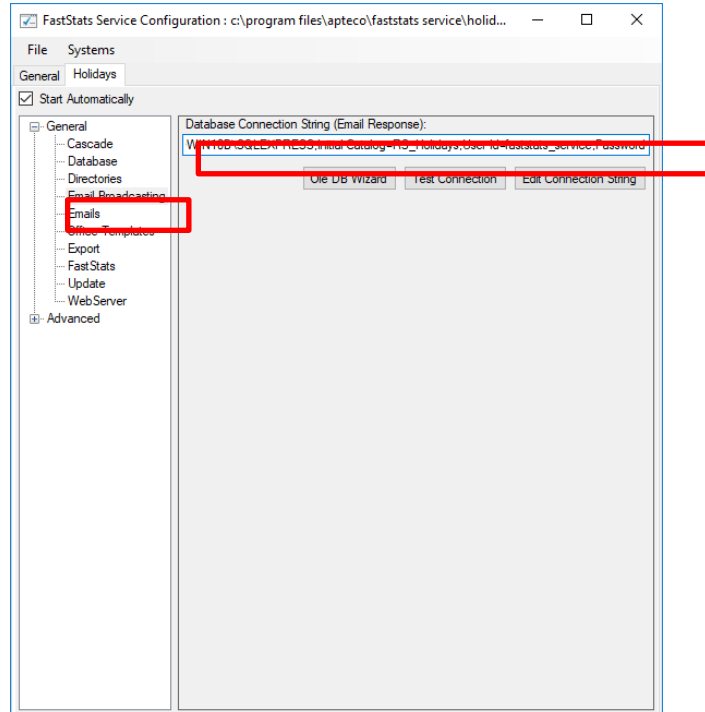
1. Open the **FastStats Configurator**
2. Select **FastStats Services**



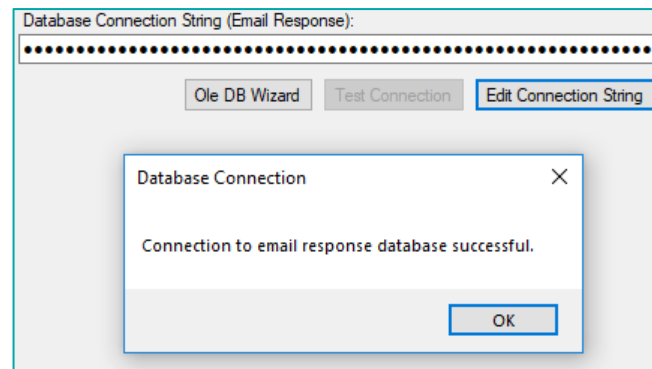
3. Select the **FastStats Service** for the system to link to the response database, click **Properties**



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.

vary with your account: nr23.elaine-asp.de

General Considerations

For broadcasts to work correctly you need to ensure that the FastStats server has access to the relevant CleverReach® server through port 443, see the example URL below; this may

3.3 Installing the Email Response Gatherer

You can find the FastStats Email Response Gatherer installer in the DigitalIntegration.zip, extract the zip file to your designated PC where you want the email response web gatherer to run.

Digital Integration.zip available from:

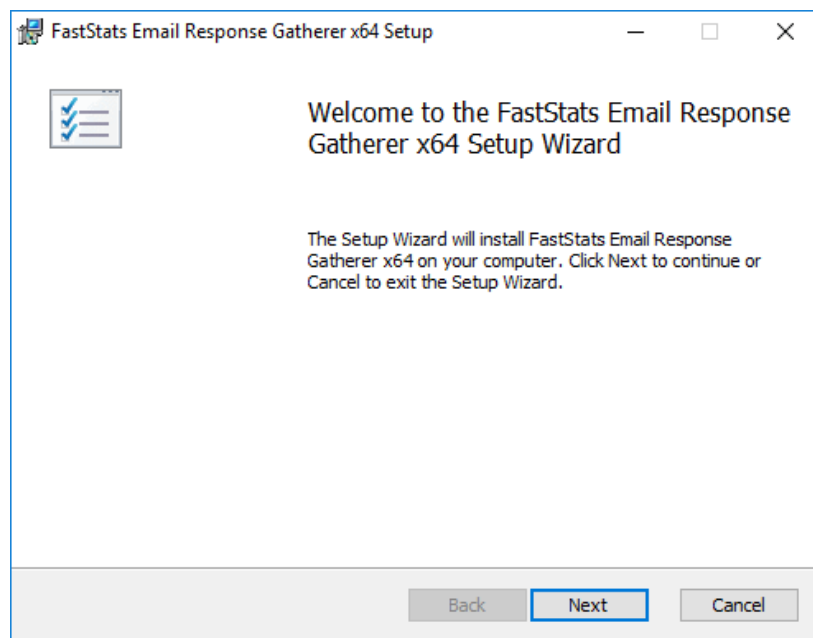
<https://www.apteco.com/portal/software-releases>

Note:

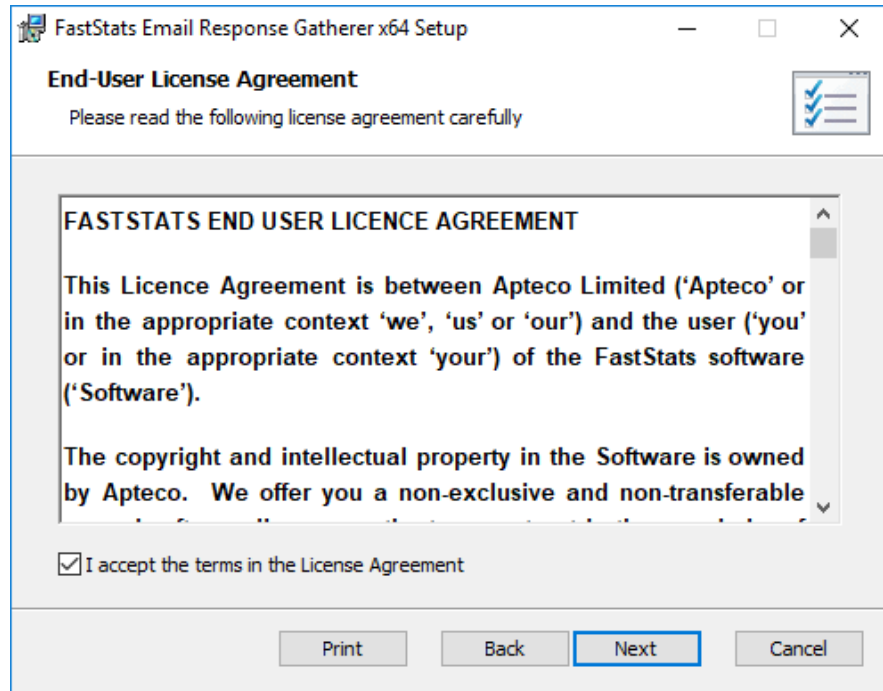
The FastStats Email Response Gatherer application can run on any PC in your system.

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

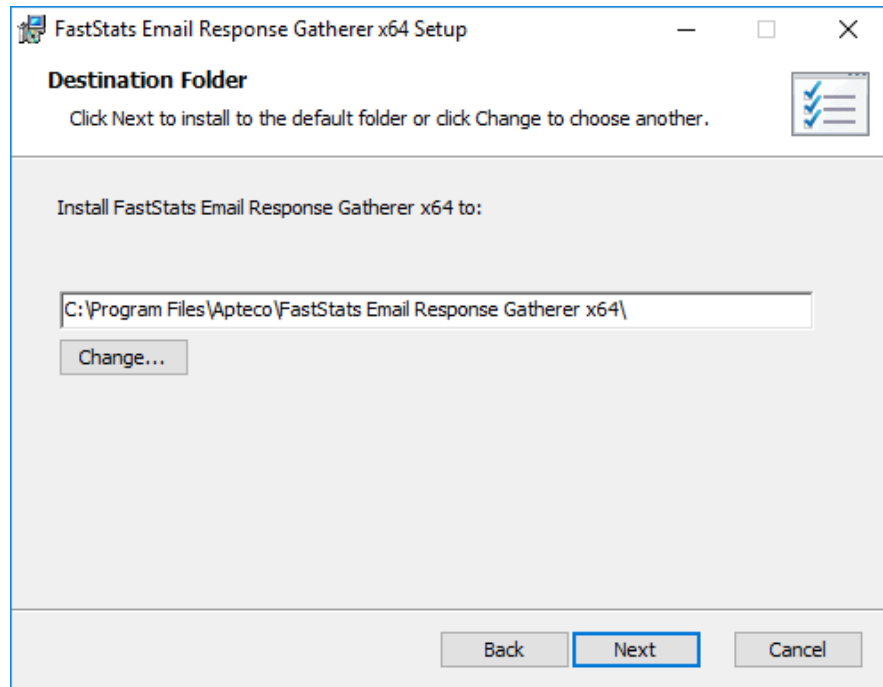
1. Click **Next**.



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



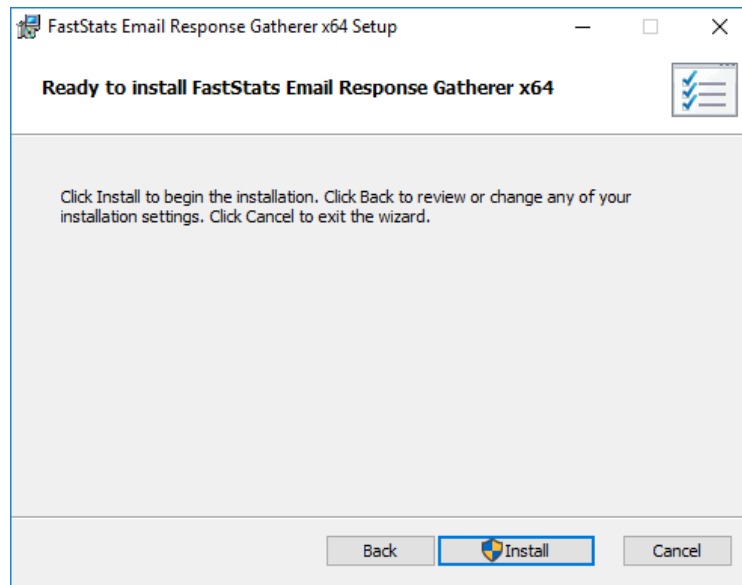
3. Click **Change** if you wish to install the Email Response Gatherer application in a different location then click **Next**



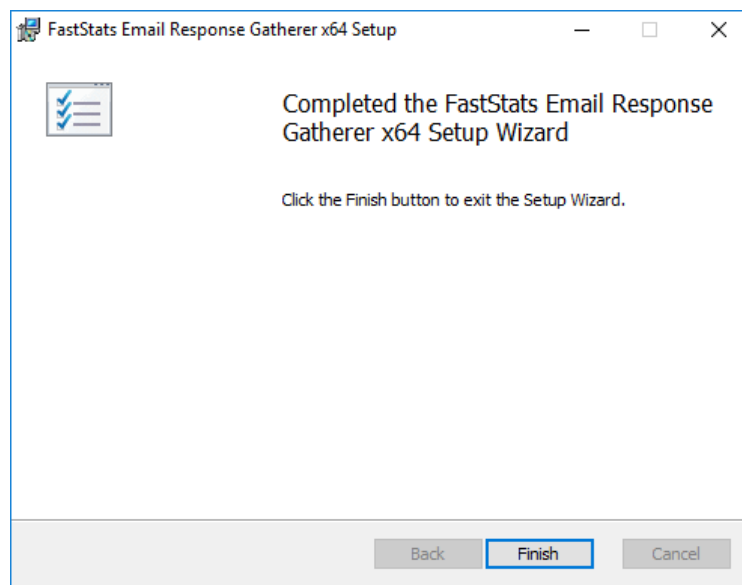
Note:

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

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



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



3.4 Creating the Response Gatherer Folders

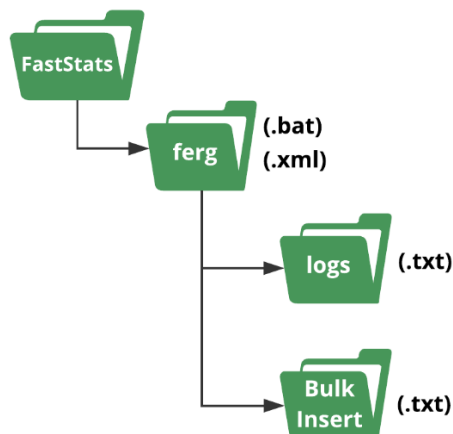
You will need to create folders to store the files to use with the Response Gatherer; these will include the following types of files.

Table 1 – Files Associated with the Response Gatherer

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

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

A typical example folder structure



Important:

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

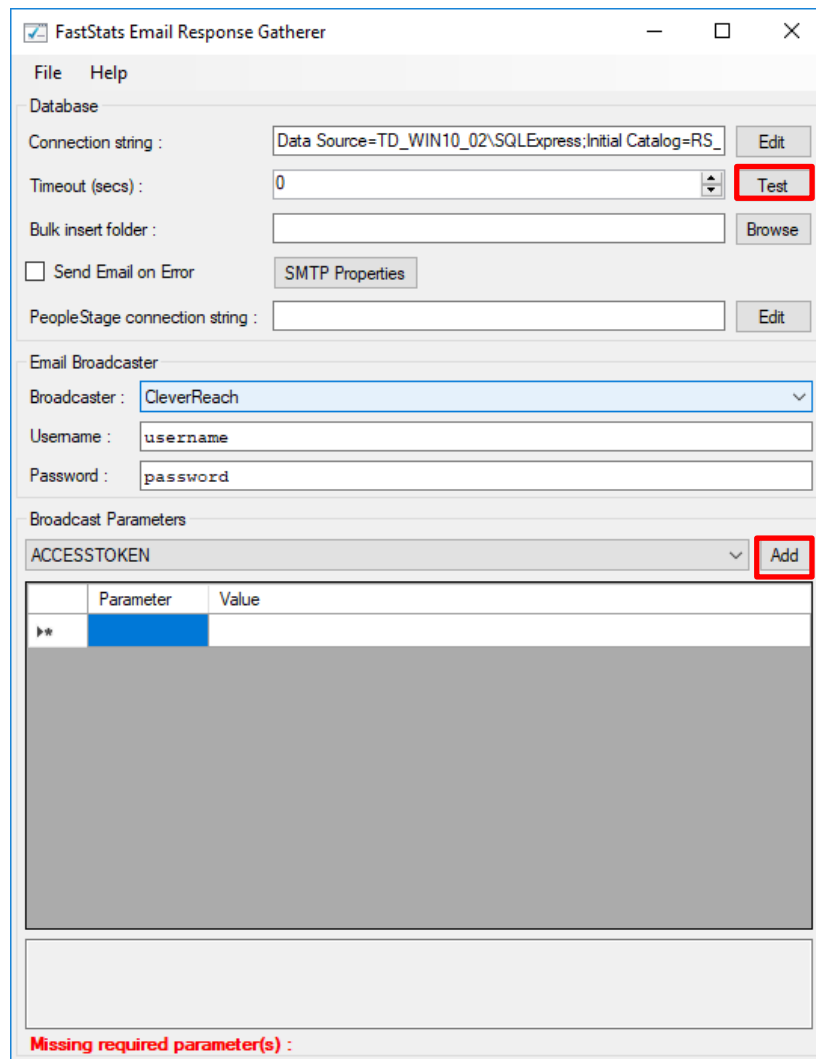
3.5 Creating the Configuration File

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

Note:

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

1. Browse to the directory where you installed the Email Response Gatherer and open the **EmailResponseConfig.exe**, enter your Connection String and click **Test**
2. Select CleverReach® from the Broadcaster drop-down list
3. Enter the **Username** and **Password** to use with the CleverReach® 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



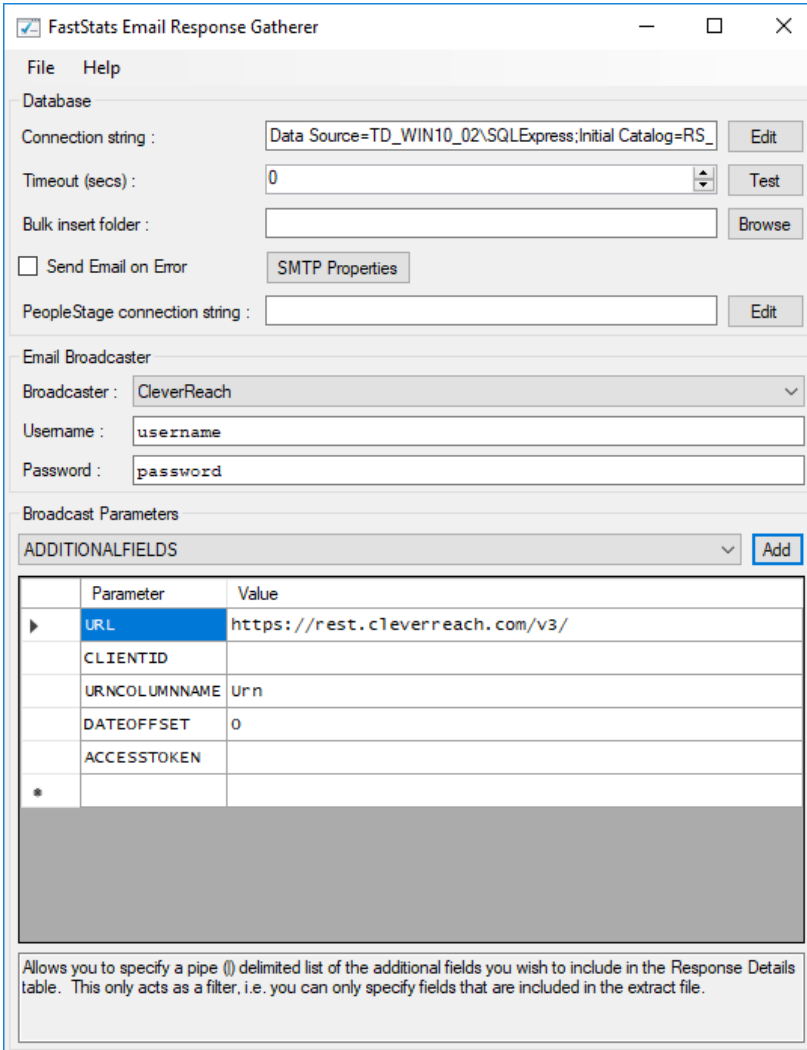
Note:

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 CleverReach®
Username	Note: The username and Password are not required with this integration
Password	

Email Response Config dialogue with REQUIRED FIELDS completed



FastStats Email Response Gatherer

File Help

Database

Connection string : Data Source=TD_WIN10_02\SQLExpress;Initial Catalog=RS_ Edit

Timeout (secs) : 0 Test

Bulk insert folder : Browse

Send Email on Error SMTP Properties

PeopleStage connection string : Edit

Email Broadcaster

Broadcaster : CleverReach

Username : username

Password : password

Broadcast Parameters

ADDITIONALFIELDS Add

Parameter	Value
URL	https://rest.cleverreach.com/v3/
CLIENTID	
URNCOLUMNNAME	urn
DATEOFFSET	0
ACCESSTOKEN	
*	

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.

Table 3 – Email Response Gatherer Parameters

Parameter	Required	Default	Description
ACCESSTOKEN	Y		The Access Token is required to access your CleverReach REST API v3. Use the Generate Token in FastStats Plugin Configurations Wizard
URL	Y	https://rest.cleverreach.com/v3/	The CleverReach log in URL that you use to access your account.
CLIENTID	Y		Obtained from CleverReach when you sign up
URNCOLUMNNAME	Y	e.g Urn* or URN*	This should refer to the custom attribute name in the CleverReach payload 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.
DATEOFFSET	Y	0	Value in hours to offset any date values received. This allows you to write responses in your current time zone.

Note:

The CleverReach® **OAuth Client ID** and **OAuth Client Secret** can be obtained from Apteco support in Germany support@apteco.de, please see the back of this document for contact details

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.

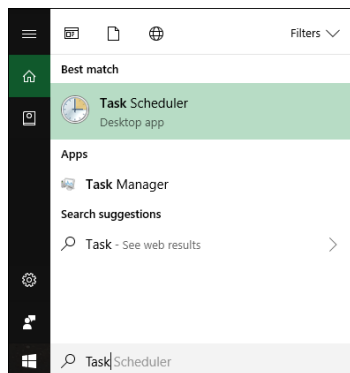
Using Task Scheduler

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

1. Open Windows **Task Scheduler**

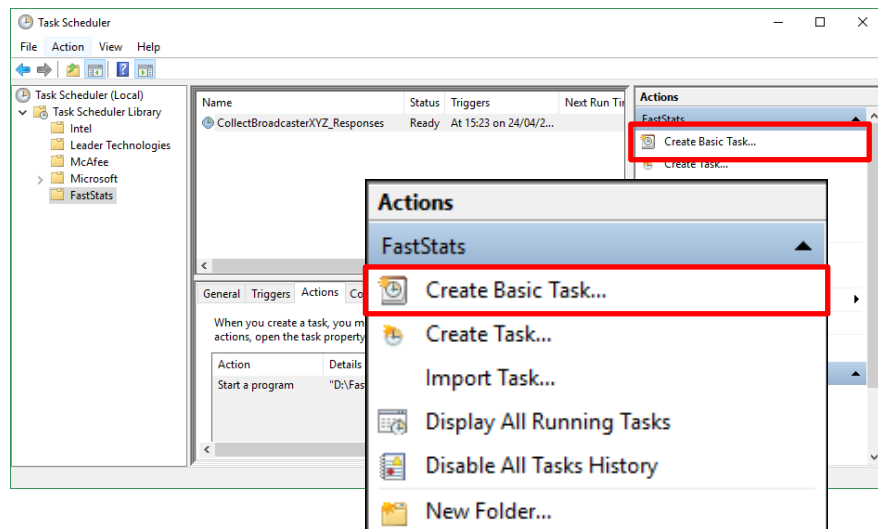
Tip

Search for **Task** in the Start Menu



The Windows Task Scheduler opens

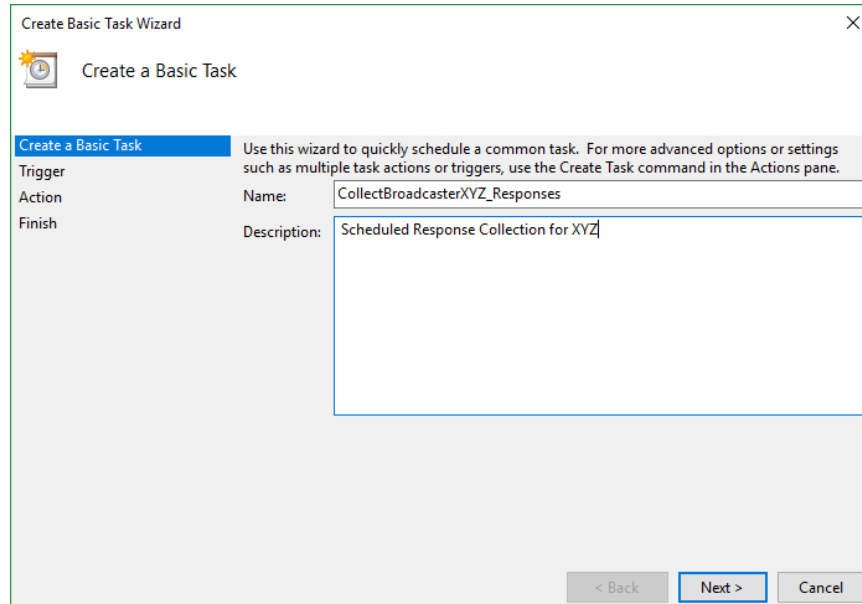
2. Select **Create Basic Task**



Tip:
You can create folders to organise your tasks

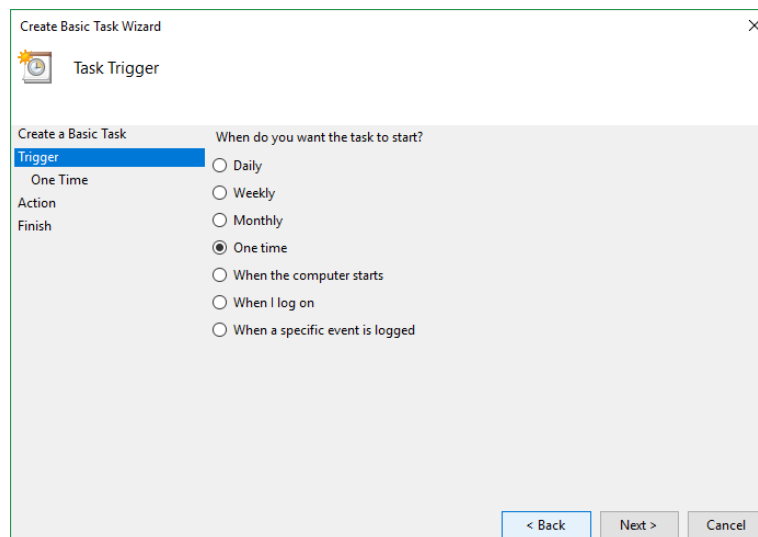
3. **Create a Basic Task** step

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

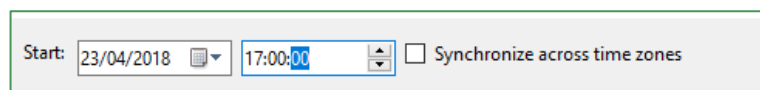


4. **Task Trigger** step

a. Select the **Trigger** interval

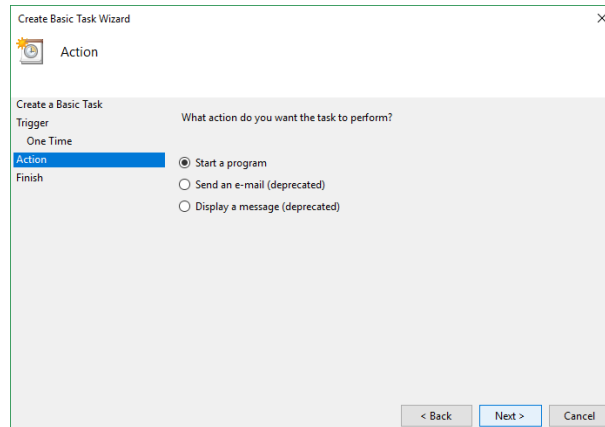


b. Enter the Start Date and Time or relevant sub-step details



5. **Action step**

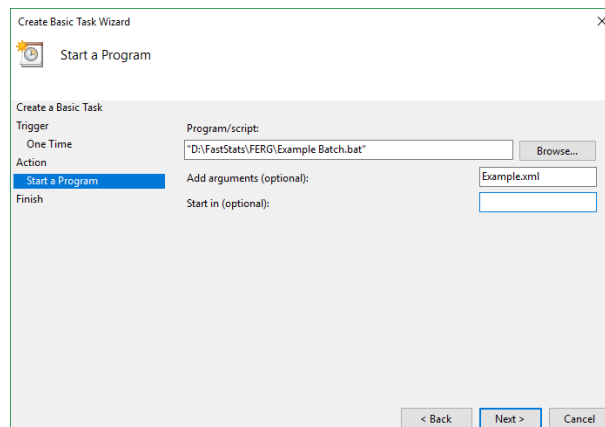
- a. Select **Start a program** and click **Next**



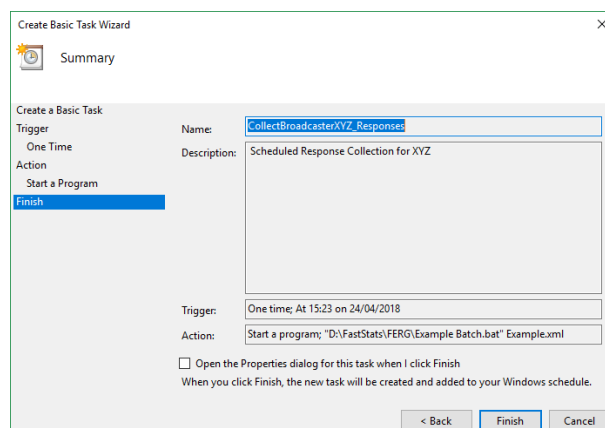
6. **Start a Program Step**

- 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

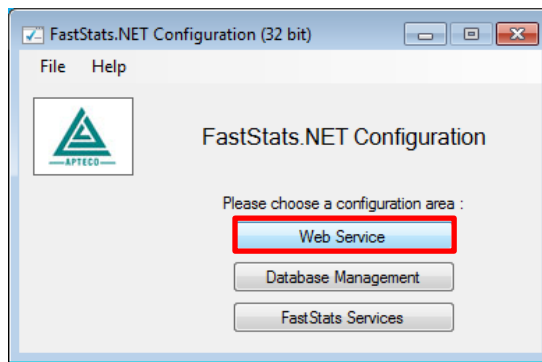
Notes:

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

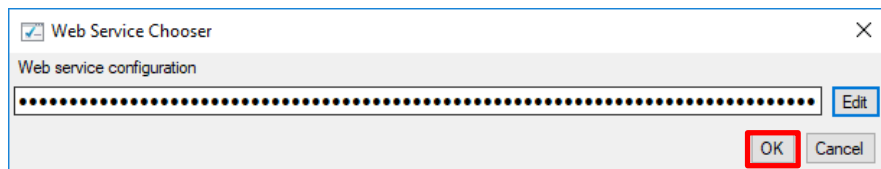
4.1 Enable Email Broadcasting

You must enable the Email Broadcasting wizard plugin.

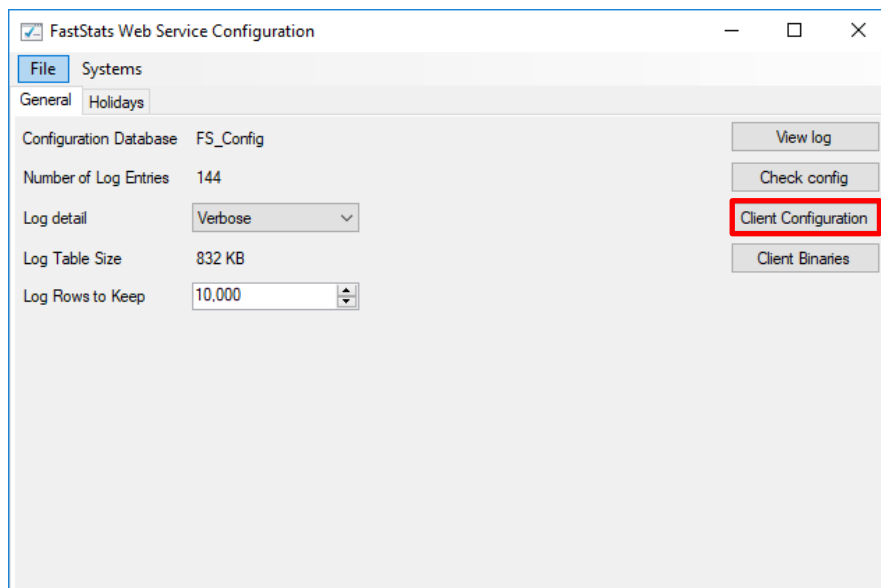
1. Open the **FastStats Configurator**
2. Select **Web Service**



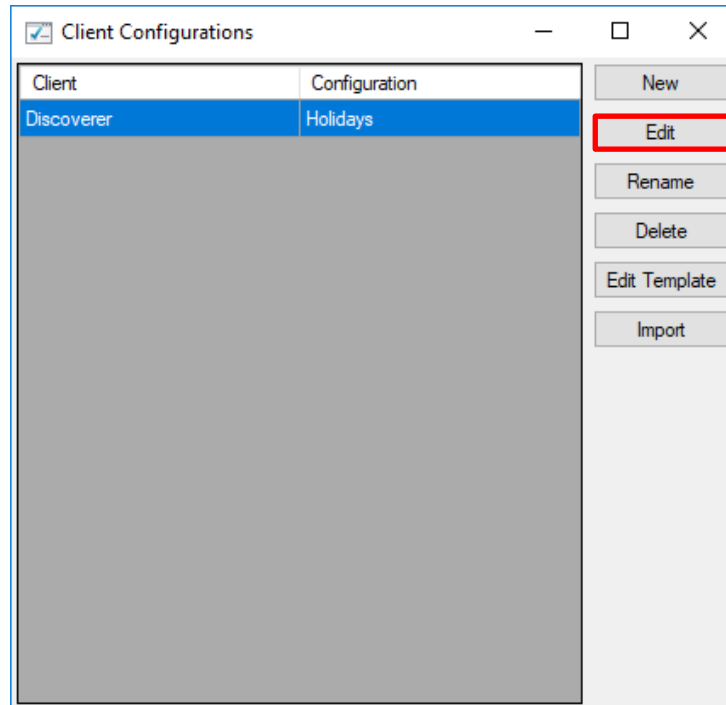
3. Click **OK** on the Web Service Chooser dialog box



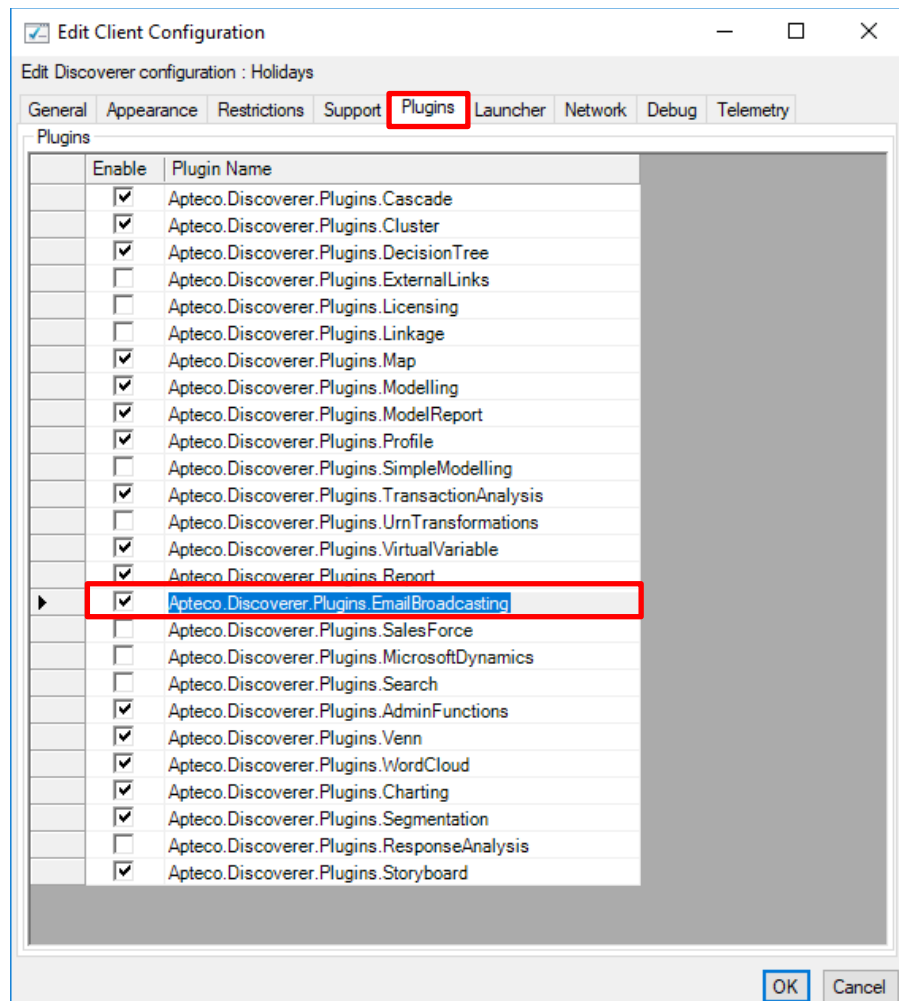
4. Click **Client Configuration**



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

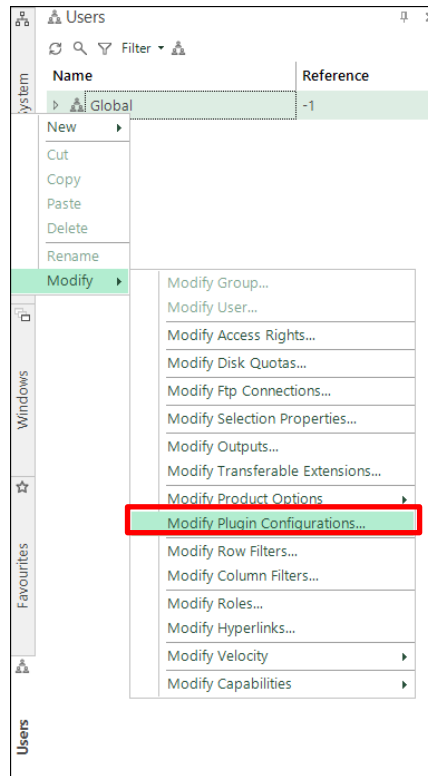


6. On the Plugins tab ensure the **Apteco.Discoverer.Plugins.EmailBroadcasting** check box is selected then click **OK**

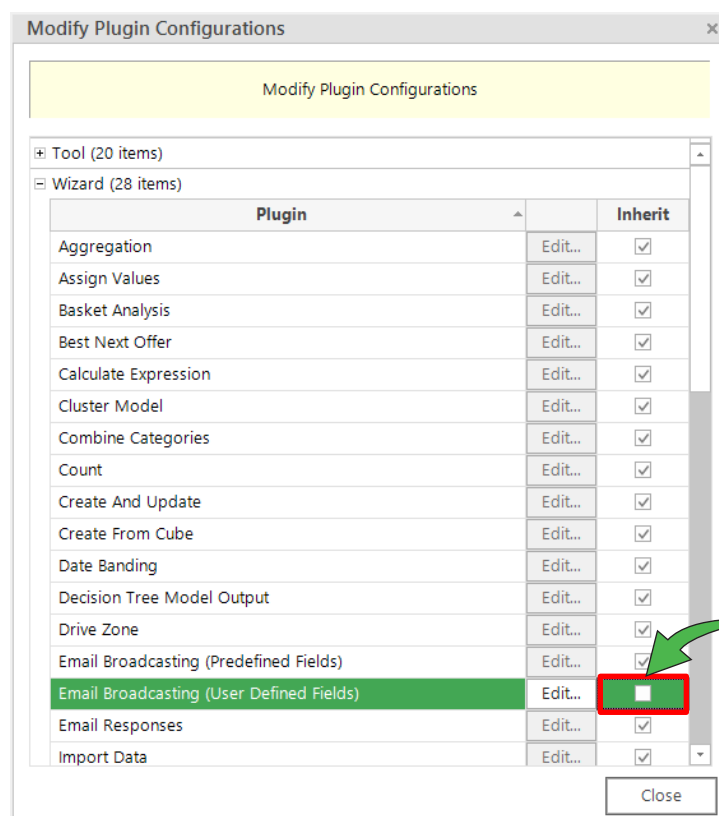


4.2 Configuration in FastStats

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 **CleverReach®** 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:
 - OAuth Client Secret: *
 - Redirect Uri: *
 - Access Token: Generate Token *
- 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 CleverReach® account.

Table 4 – Edit Template Known Parameters Settings

Parameter	Settings to use
Client ID (Reqd)	CleverReach Client ID
OAuth Client ID (Reqd)	CleverReach OAuth Client ID
OAuth Client Secret (Reqd)	OAuth Client Secret
Redirect Uri (Reqd)	The Redirect Uri is a web page that is loaded after obtaining the Access Token in the form https://www.domain.de
Access Token (Reqd)	Enter the above parameters and click Generate Token, see 4.2.1 below.
Uri	https://rest.cleverreach.com/v3/ *
Use Dated List	Selected (default)
Dated List Format	yyyyMMdd-HHmss
From Email	Optional. Enter the from email address for your message, leave blank to use the from email address in the CleverReach Message template.
From Name	Optional. Enter the from name for your message, leave blank to use the from name in the CleverReach Message template.
Upload Empty Lists	Selected (default)
Email Field Name	Email *
SMS Field Name	(blank by default) *
Urn Field Name	The name used in CleverReach for the Urn e.g. URN*
Subject	Optional, either use the PeopleStage Content field to match the Subject parameter in CleverReach or you can add a parameter here which will populate the email subject line, for example {SUBJECT_LINE[std:Summer Saver Promotion]}
Mailing Draft Limit	10 (by default) *
Message Retrieval Period	1M (by default) *
Message Send Retries	10 (by default) *
Encoding	Default

Note:

*These settings will be specific to your CleverReach® account.

Note:

The CleverReach® **OAuth Client ID** and **OAuth Client Secret** can be obtained from Apteco support in Germany support@apteco.de, please see the back of this document for contact details

4.2.1 Obtaining your CleverReach Access Token


1. Enter the **Client ID**, **OAuth Client ID** and **OAuth Client Secret**

Client ID	<input type="text" value="12345"/>	*	
OAuth Client ID	<input type="text" value="Your OAuth Client ID"/>	*	
OAuth Client Secret	<input type="text" value="Your OAuth Client ID"/>	*	
Access Token	<input type="text"/>	<input type="button" value="Generate Token"/>	*

2. Click **Generate Token**

The following dialogue opens

Warning: The app has not officially been approved by CleverReach®.



Simply transmit Apteco PeopleStage 2017-Q4 data and get started with CleverReach® for free:

Create and connect your CleverReach® account now!

Log in with my existing CleverReach® account and connect

Apteco PeopleStage 2017-Q4 requires access to your CleverReach® account ⓘ

For a successful connection, a CleverReach® account will automatically be created and all data transmitted for the registration. You can use the free account if we are allowed to send you regular account reports, news & product information via email. CleverReach® will use your data exclusively for the aforementioned purpose

3. Login to your existing CleverReach account to obtain the OAuth Access Token

Warning: The app has not officially been approved by CleverReach®.

Back

Simply log in to your CleverReach® account and connect your Apteco PeopleStage 2017-Q4:

Customer ID 72759

User name admin

Password *****

Log in now & connect Apteco PeopleStage 2017-Q4!

Forgot your password?

Close Cancel

4. Enter your CleverReach **Customer ID** (the CleverReach Client ID), **API Username** and **Password**, click the **Log in now...** button

The Uri Redirect page loads briefly, the Access Token box is now populated

Note:

You only need to perform this once so you can save the Access Token to use in the Response Gatherer and the PeopleStage Channel Editor

Note:

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

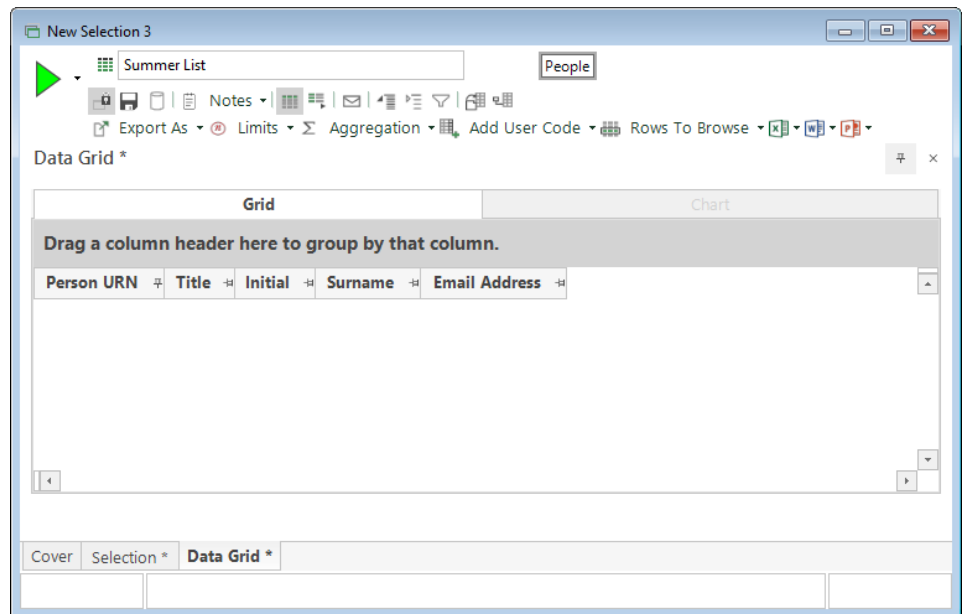
4.3 Checking your configuration

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.

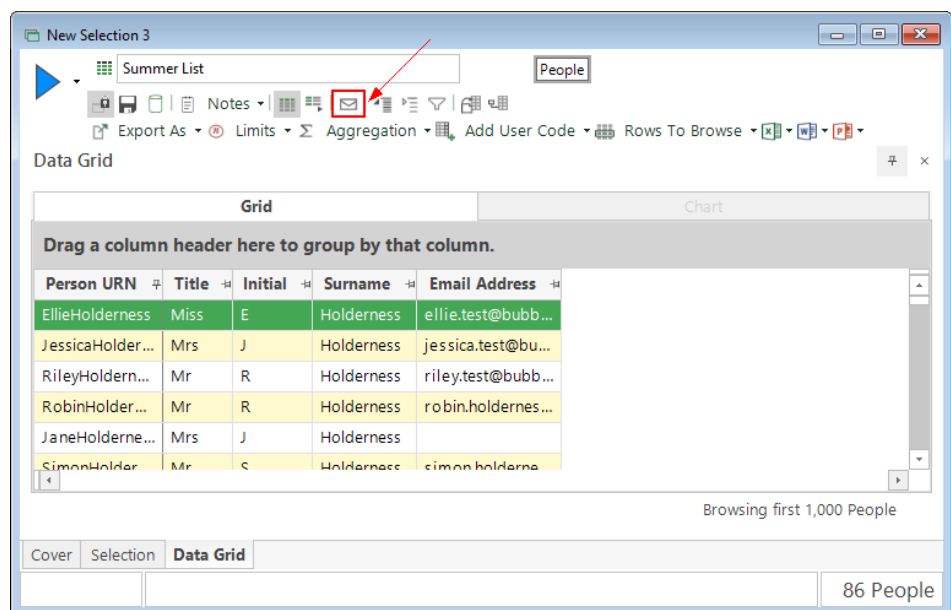
Note:

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

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



2. Click the **Email Broadcasting** icon

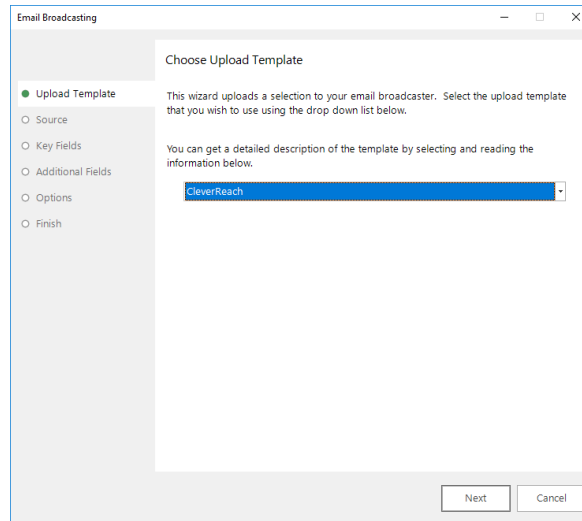


The **Email Broadcasting Wizard** opens

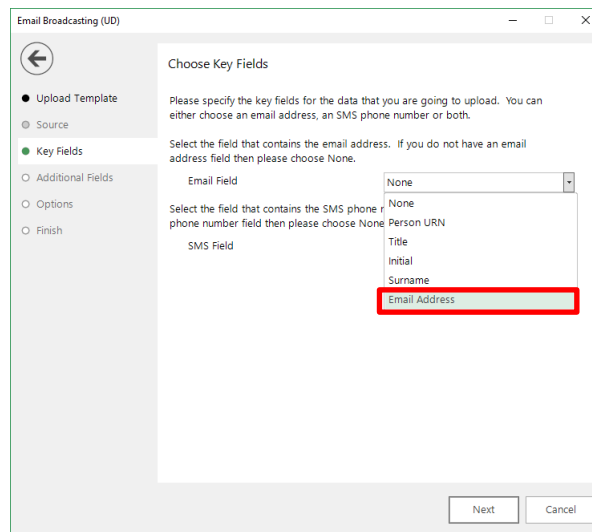
3. Choose the **CleverReach®** template from the drop-down list and click **Next**

Note:

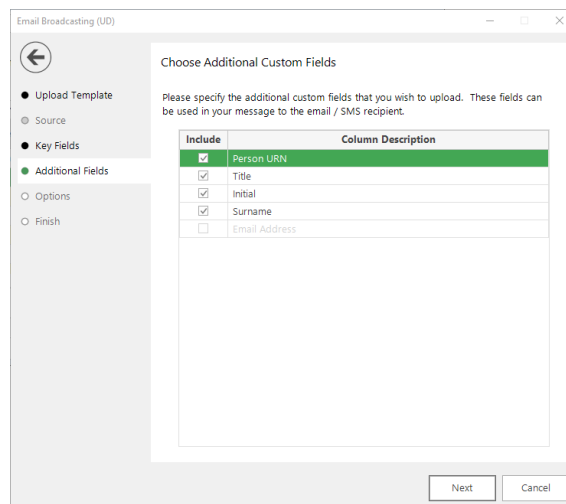
The wizard will omit this step if you have only one Upload Template



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



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



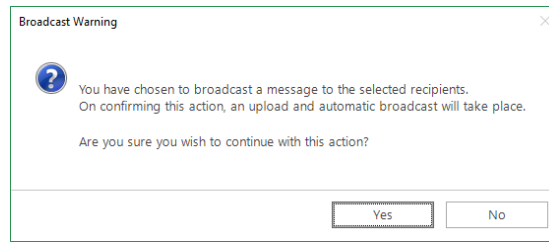
6. Complete the **Email Broadcasting Details** form then click **Next**

Table 5- EmailResponseGatherer.exe.config Settings

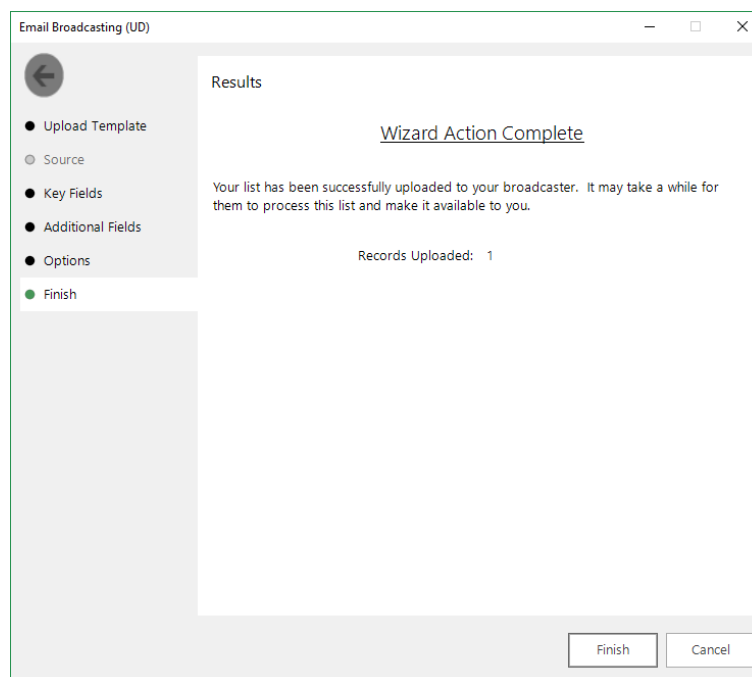
Option	Settings to use
Username	The username for your CleverReach® account
Password	The password for your CleverReach® account
List Name drop-down	Click on the List Name retrieve button and select a list from the drop-down (this appends any new records to the list) or enter a new List Name
Message Name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

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

Click **Yes** to commit this action



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

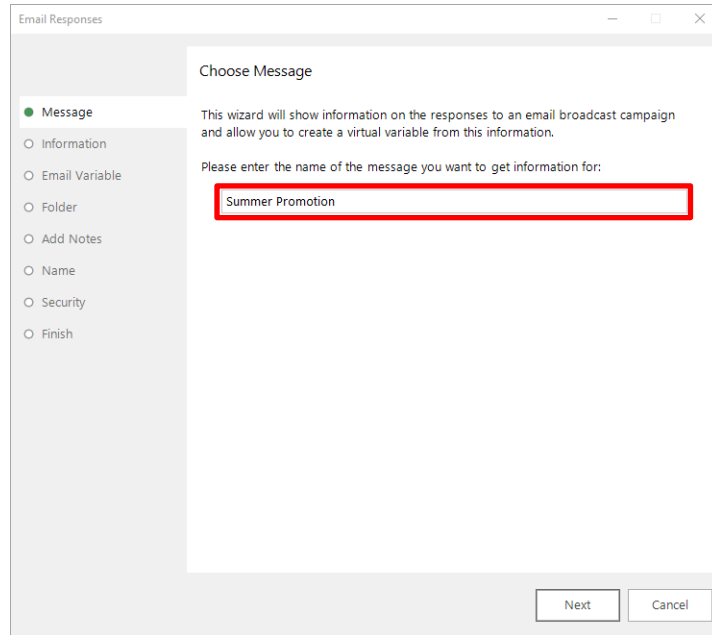


Note:
You will need to exit out of FastStats and log in again for these changes to take effect.

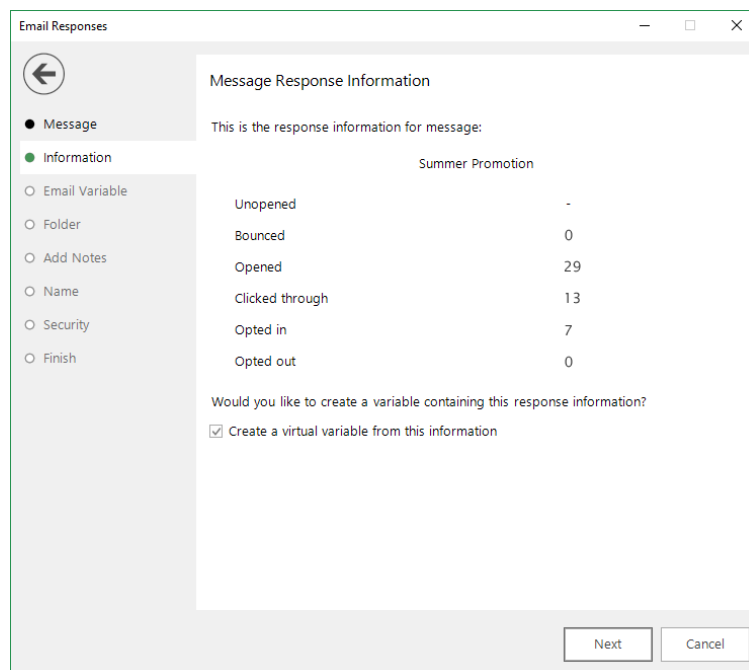
4.4 Email Responses Wizard

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

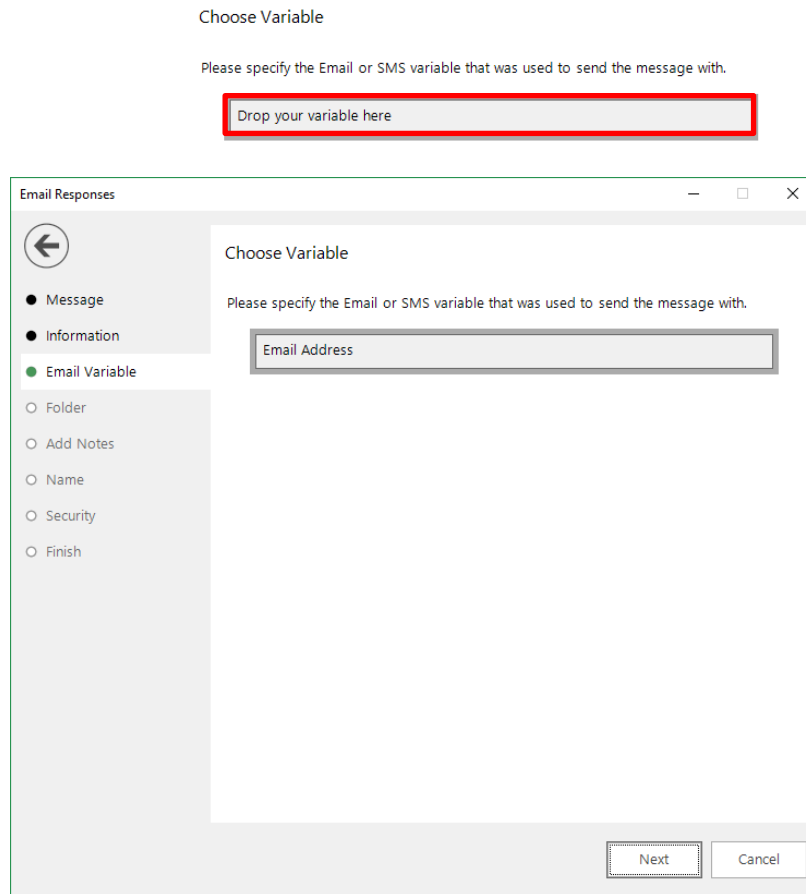
1. Open the **Email Responses** wizard
2. Enter the name of the message that you used in the Email Broadcasting wizard and click **Next**



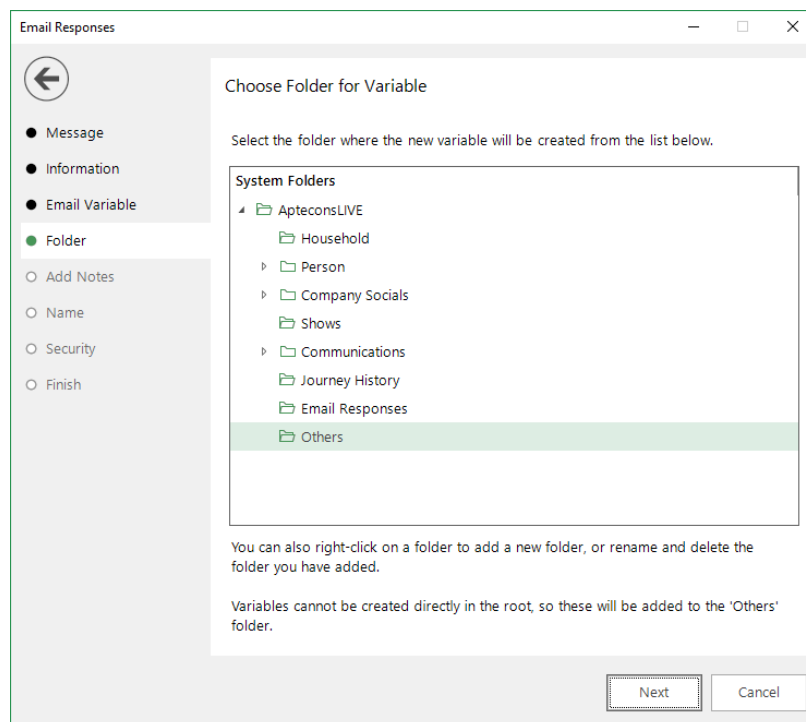
3. As the Email Response Gatherer starts collecting information from CleverReach®, you will see how customers are interacting with your broadcast. If you want to analyse this information further, click on Create a virtual variable from this information and then click Next



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**



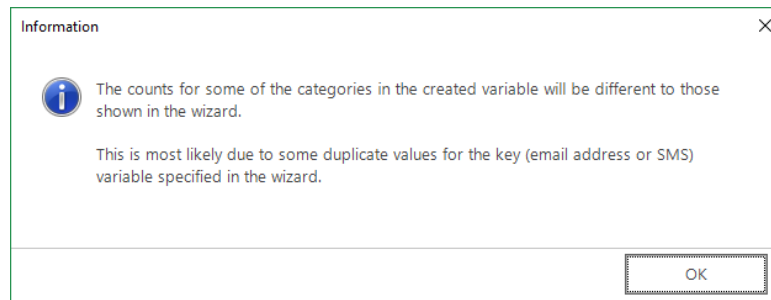
6. Enter any notes that will be stored along with the virtual variable and click **Next**

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

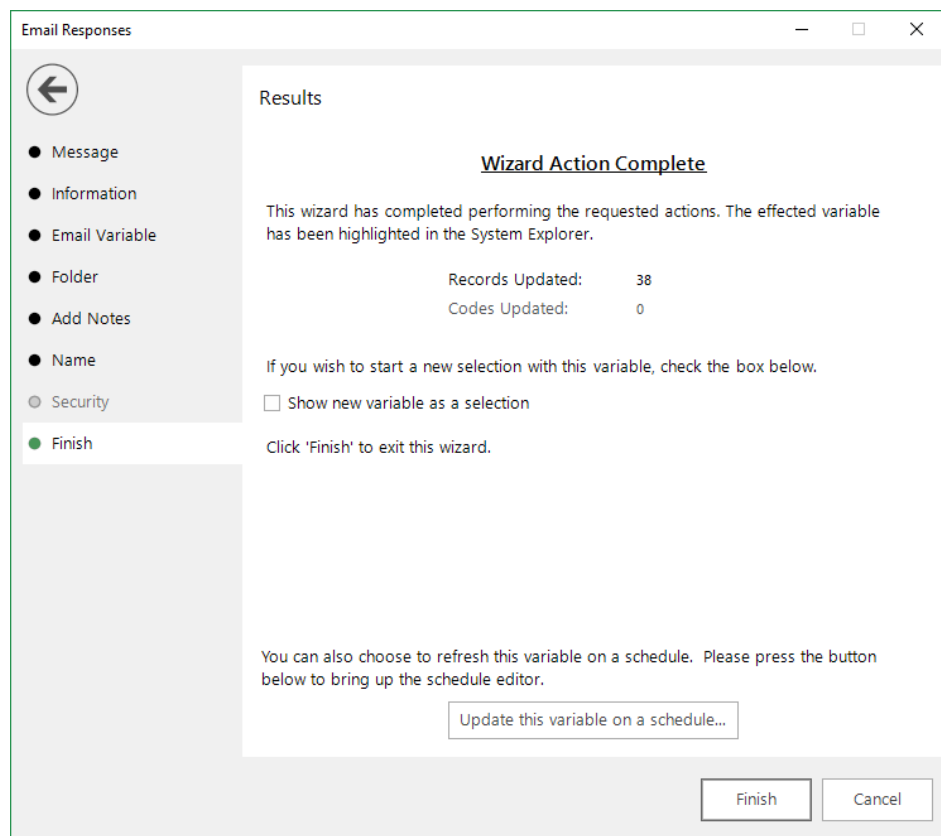
7. Enter a Description for the virtual variable or drag an existing virtual variable onto the drop box if you wish to overwrite it. Modify the Security Attributes if applicable and then click **Next**

The screenshot shows a window titled "Email Responses" with a sidebar on the left containing a navigation menu. The menu items are: Message, Information, Email Variable, Folder, Add Notes, Name (highlighted with a green dot), Security, and Finish. The main content area is titled "Choose Variable Description" and contains the text: "We need a description for your new variable. A unique variable reference will be created for the variable based on the description and table name." Below this text is a text input field with the value "Summer Promotion Response" highlighted by a red box. Below the input field is a grey box with the text "Drop the variable to overwrite here". Below the grey box is the text: "Alternatively you can choose to overwrite an existing virtual variable with these new values. Drag the variable to be overwritten onto the panel below." Below this text are two checkboxes: "Create URN Snapshot" (unchecked) and "Modify Security Attributes" (unchecked). Below the checkboxes is a progress bar showing "0%". At the bottom right of the window are two buttons: "Next" and "Cancel".

8. Click **OK**



9. Click **Finish**

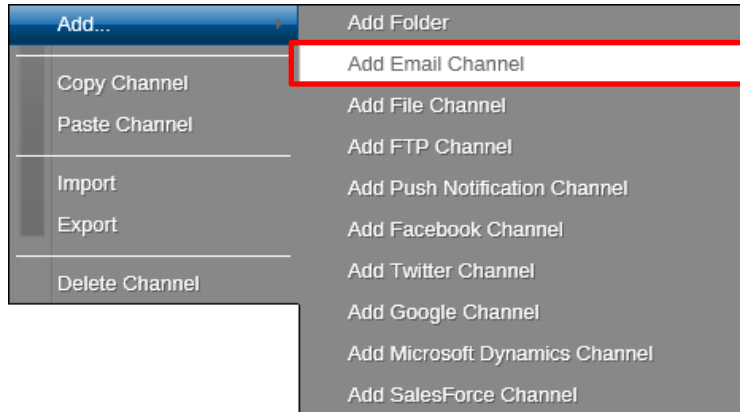


5 PeopleStage Broadcasting & Responses

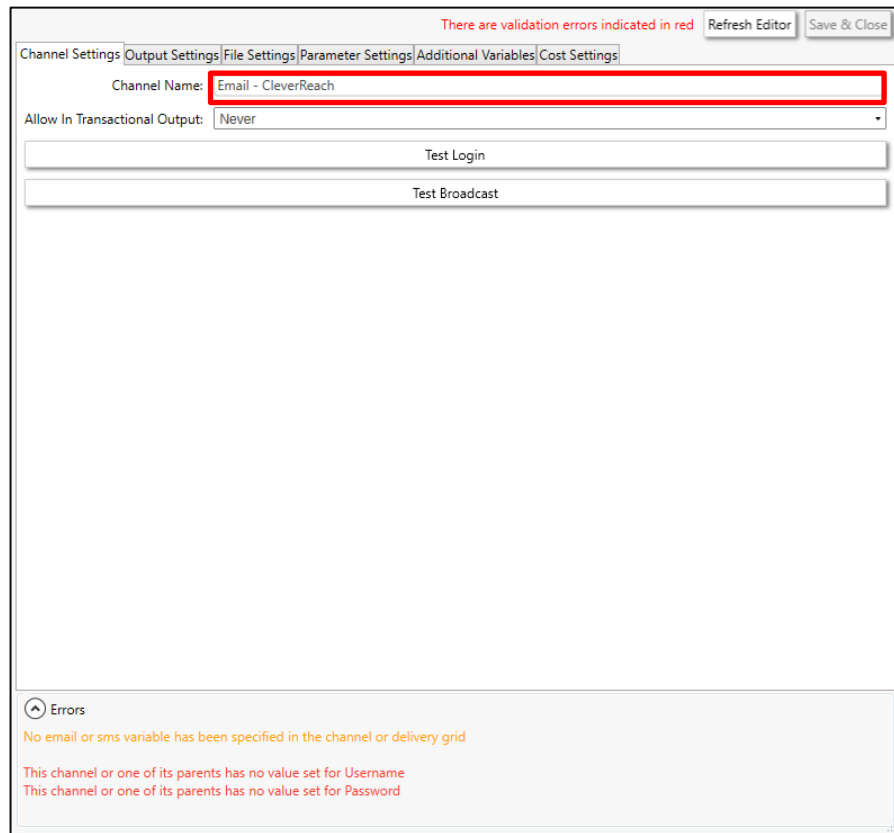
5.1 Defining the Broadcast Channel in PeopleStage

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

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 CleverReach®

Table 6 –PeopleStage Output Settings

Field	Settings
Broadcaster	Select CleverReach® from the drop-down
Username	Enter your API username
Password	Enter your API password
Variable Name	Select Email Address from the drop-down
Variable Description Override	Enter the description, for example, “Email Address” Note: This must correspond to the e-mail field within CleverReach®
Upload but don’t broadcast	(Optional) – Select this check box to upload the list only without initiating a broadcast
Reply email Address	The email address that will receive notifications when the channel is used, i.e. list uploaded / broadcast. Note: This is not the reply email address that will be used for the email send.
Number of Retries	The number of times to retry on failure of the channel. It is recommended (for Broadcast Channels) to leave this at 0. The Delivery Agent also has a retry value, so setting this to > 0 can result in multiple retries and may cause undesirable results
Response File Key Type	The key field to match responses to sends. Varies from broadcaster to broadcaster due to the fields they return in the response file. Should be set to Communication Key for CleverReach®.
Message Content Type	Only Dynmark has the ability to use PeopleStage templates so this will always be Broadcaster Template . This is where the creative comes from.

4. Complete the **File Settings**

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

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

Zip File

Output File Format: Comma Separated Values (CSV)

Output Header: Descriptions

Delimiter: Tab

Alpha Encloser: None

Numeric Encloser: None

Extras:

Encoding: utf-8

Errors

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

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

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

Table 7 –Example PeopleStage Parameter Settings

Field	Settings
	*Example, these will be specific to your account
Client ID*	CleverReach Client ID*
Access Token*	Paste the Access Token available from the Plugin Configurations Edit Template, see section 4.2.1
Uri	https://rest.cleverreach.com/v3/ *
Subject	Optional, either use the PeopleStage Content field to match the Subject parameter in CleverReach or you can add a parameter here which will populate the email subject line, for example {SUBJECT_LINE[std:Summer Saver Promotion]}
Message Retrieval Period	24M
Encoding	UTF8
Urn Field Name	The CleverReach Urn fieldname*

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

Note:

The CleverReach® **OAuth Client ID** and **OAuth Client Secret** can be obtained from Apteco support in Germany support@apteco.de, please see the back of this document for contact details

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

Note:

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

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

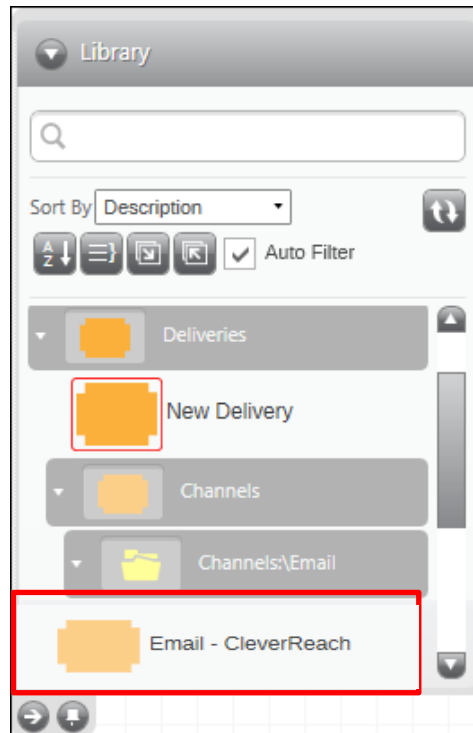
Additional Variables Location: End

Errors

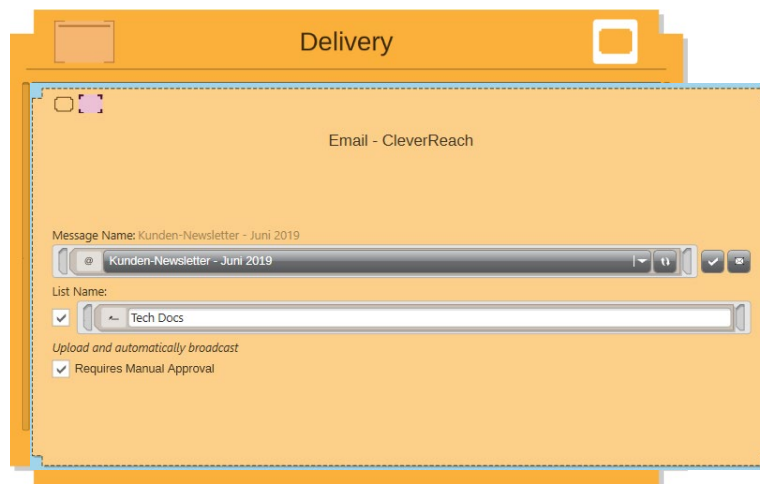
5.2 Broadcasting in PeopleStage

You can now test your channel at any Delivery Stage

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



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

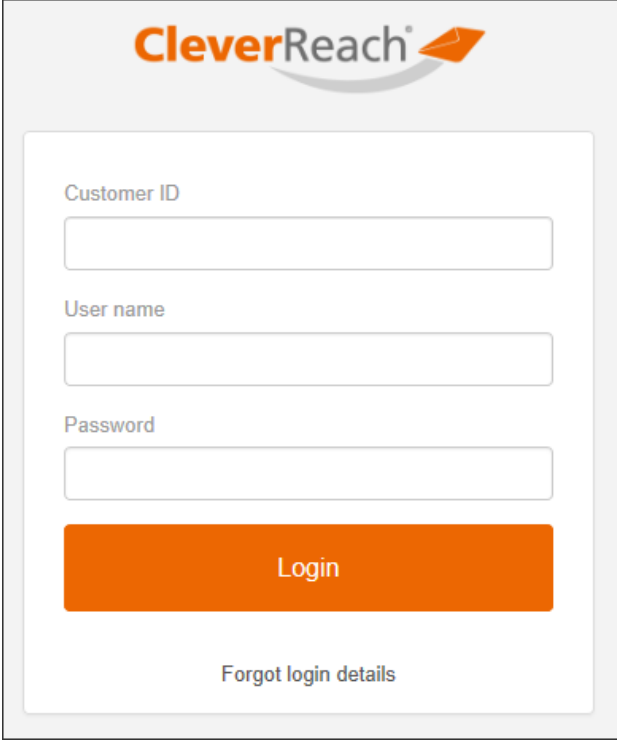
FastStats or PeopleStage uploads a list of subscribers and insert them into the CleverReach® List

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 CleverReach®.

Note:

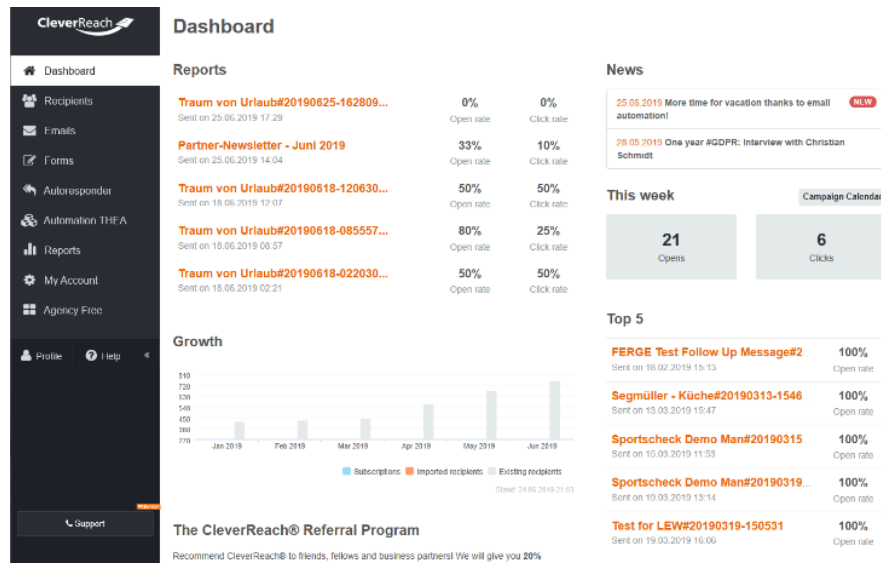
This section is not a detailed guide on using CleverReach, your Client ID and other credentials are provided by CleverReach during the signup process, for more information on using CleverReach please visit <https://support.cleverreach.de>

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



The image shows a login form for CleverReach. At the top, the CleverReach logo is displayed. Below the logo, there are three input fields: 'Customer ID', 'User name', and 'Password'. Each field is a simple white box with a light gray border. Below the 'Password' field is a large orange button with the text 'Login' in white. At the bottom of the form, there is a link that says 'Forgot login details'.

2. The CleverReach dashboard opens



Creating a new Message in CleverReach®

If this is the first using CleverReach, you must create a List and an Email (Message),

Note:

The first time you use CleverReach®, you must create the fields to use in FastStats or PeopleStage.

If these are already set up, you can select which Message and List to broadcast to and check the field names and parameters to use in FastStats or PeopleStage.

- From Recipients either use an existing List or click **Add List** you do not need to add subscribers as FastStats or PeopleStage uploads a list of subscribers.

You need to create a Message to use in FastStats or PeopleStage.

- Step through the wizard to create a basic email and assign it to a List

Note:

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

Appendix B: API Parameters

Table 8 – Email Response Gatherer Parameters

Parameter	Required	Default	Description
ACCESSTOKEN	Y		The Access Token is required to access your CleverReach REST API v3. Use the Generate Token in FastStats Plugin Configurations Wizard
URL	Y	https://rest.cleverreach.com/v3/	The CleverReach log in URL that you use to access your account.
CLIENTID	Y		Obtained from CleverReach when you sign up
URNCOLUMNNAME	Y	e.g Urn* or URN*	This should refer to the custom attribute name in the CleverReach payload 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.
DATEOFFSET	Y	0	Value in hours to offset any date values received. This allows you to write responses in your current time zone.

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

	Required	Response Table field	CleverReach® extract file column
EMAILCOLUMNNAME	N	Email	Email address
COMMUNICATIONKEYCOLUMNNAME	N	CommunicationKey	FastStats Communication Key. Only be available if it has been previously uploaded from FastStats
RUNCOLUMNNAME	N		Reserved for future use
TYPECOLUMNNAME	N	MessageType	Response type
MESSAGENAMECOLUMNNAME	N		The message name is not returned in the CleverReach® extract file, but a reference is, this should typically be left as the default value
DELIVERYDATECOLUMNNAME	N	DeliveryDate	Delivery date
CLICKURLCOLUMNNAME	N	ClickUrl	The name of the URL that was clicked
CLICKDATECOLUMNNAME	N	ClickDate	Date the link was clicked
EVENTTRIGGEREDDATECOLUMNNAME	N	EventTriggeredDate	Date the response occurred
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.
CONSTANTFIELDS	N		Pipe delimited field of key value constants, seperated by # e.g. Key1#Value1 Key2#Value2.
DATEFORMAT	N	UnixTimeStamp	Date format used e.g. dd.MM.yyyy HH:mm
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.
EXECUTIONTAG	N		When using Smart Execution, this can be used to identify seperate accounts when using the same broadcaster.
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	
REPORTSPAGESIZE	N	100	The page size of reports data to return when calling api GET /v2/reports.json. Maximum 100.
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
Client ID	Y	.	CleverReach Client ID
OAuth Client ID	Y		CleverReach OAuth Client ID
OAuth Client Secret	Y		OAuth Client Secret
Redirect Uri	Y		The Redirect Uri is a web page that is loaded after obtaining the Access Token in the form https://www.domain.de
Access Token	Y		Enter the above parameters and click Generate Token, see 4.2.1
Uri			https://rest.cleverreach.com/v3/ *
UseDatedList	N	true	Setting this to false will remove the date and time stamp at the end of the file name
DatedListFormat	N	yyyMMdd- HHmmss	
From Email	N		Optional. Enter the from email address for your message, leave blank to use the from email address in the CleverReach Message template.
From Name	N		Optional. Enter the from name for your message, leave blank to use the from name in the CleverReach Message template.
UploadEmptyLists	N	true	Set this to false if you wish to prevent empty list being uploaded to CleverReach®
Email Field Name	N		Email *
SMSFieldName			The name of the field in CleverReach® that will hold the mobile number
UrnFieldName	N		The name of the field in CleverReach® that will hold the URN
Subject	N		Optional, either use the PeopleStage Content field to match the Subject parameter in CleverReach or you can add a parameter here which will populate the email subject line, for example {SUBJECT_LINE[std:Summer Saver Promotion]}
Mailing Draft Limit	N	10	
Message Retrieval Period	N	1M	
Message Send Retries		10	
Encoding	N	UTF8	Enter the encoding of the incoming file

Note:

The CleverReach® **OAuth Client ID** and **OAuth Client Secret** can be obtained from Apteco support in Germany support@apteco.de, please see the back of this document for contact details

Appendix C:Example Batch File

Example batch file to use with FERG and scheduling

```
@echo off

REM *****
REM File Name: CleverReach®BatchFile.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\CleverReach.txt"
SET LOGFILEDETAILS="Logs\CleverReach_Details.txt"
echo. >> %LOGFILE%
echo. >> %LOGFILEDETAILS%
echo %date% %time% - Starting FastStats CleverReach Response Download >> %LOGFILE%
echo %date% %time% - Starting FastStats CleverReach Response Download >> %LOGFILEDETAILS%
echo. >> %LOGFILE%
>> %LOGFILEDETAILS%
echo.
%FERG% CleverReach.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 Elaine Responses OK >> %LOGFILE%

goto Complete

:FailedLogin

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

goto Complete

:FailedDownload

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

goto Complete

:FailedLogout

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

goto Complete

:FailedException

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

goto Complete

:Complete

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

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

```
%FERG% CleverReach.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

For customer service and technical support visit:

www.apteco.com/support

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

Note: If you have purchased the Apteco Marketing Suite™ via one of our partners then they are your first line of support.

Apteco GmbH

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

Apteco Australia Pty Ltd

Level 4
55 Harrington Street
The Rocks NSW 2000
Australia
T: +61 (0) 2 8355 2524
www.apteco.com.au

Apteco Benelux

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

Head Office

Apteco UK

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

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

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