

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.

1.2Before 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[®] ①Client Id, ②OAuth Client ID, ③OAuth Client Secret and Redirect Uri. ④Access 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:

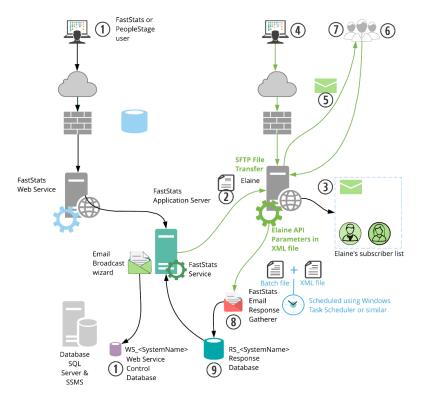
The CleverReach[®] **OAuth Client ID** and **OAuth Client Secret** can be obtained from Apteco support in Germany support@apteco.de, please see the back of this document for contact details

2 Process Summary

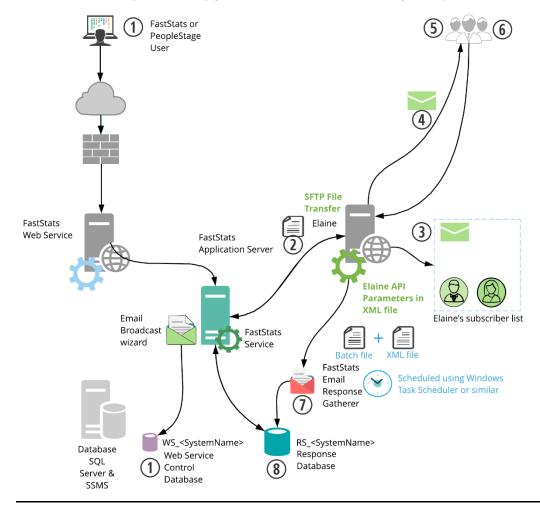
2.1 Architecture

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





- 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.
- 6



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

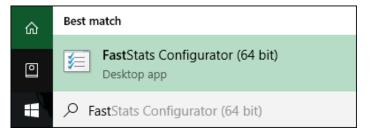
3.1 **Creating the Response Database**

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.

FastStats.NET Con	figuration (32 bit)	- • •
File Help		
	FastStats.NET C	Ŭ
	Please choose a config	guration area :
	Web Servio	ce
	Database Mana	gement
	FastStats Sen	vices

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

🔽 Database Management
Please choose the database management wizard you wish to run:
O Database Creation Wizard
Create a new FastStats Configuration, Control, PeopleStage, Email Response or Cascade database
Database Update Wizard
Scan for and update existing FastStats databases
Advanced
Other options such as Delete Database, Backup Database
Start Wizard

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

Database Server :	TDXPS8930DT\SQLEXPRES	5
	✓ Windows Authentication	
Usemame :		
Password :		
		Test Connec
		Test Database Connection X
		Connection succeeded
		ОК

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.

🖉 Create Database	Vizard	-	
Step 2 - Additional In	omation		
System name :	Holidays		
Default password :	•••••		_

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

	e Database Wizard Choose database compon	anta	_		×
Install	Component	Database Name	Notes		
	Configuration	FS_Config	Database	already e	exists
	Control	WS_Holidays	Database	already e	exists
	Email Response	RS_Holidays			
	PeopleStage	PS_Holidays			
	PeopleStage SmokeTest	ST_Holidays			
	Orbit	OB_Holidays			
	Business Library	BL_Holidays			
	Archive	AR_Holidays			
	Facebook	FB_Holidays			
	PushNotifications	PN_Holidays			
	Cascade	CS_Holidays			
	Twitter	TW_Holidays			
	Google	GO_Holidays			
			Select A	ll Ref	resh
				Back	Nex

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.

] Create Database Wizard	-		>
Step 4 - Review actions			
Parameters :			^
<configuratorbuild> = 17313</configuratorbuild>			
<db password=""> = fa5t5tat5!</db>			
<systemname> = Holidays</systemname>			
<db_location> =</db_location>			
<db_log_location> =</db_log_location>			
<responsedb> = RS_Holidays</responsedb>			
		Back	N

8. Click **Run Scripts**.

🗾 Create Database Wizard			_		×
Step 5 - Create Database(s)					
Email Response	View Notes	Copy Script	View Log		
	 			_	
			Run Scrip	ts Car	ncel
				Back	Next

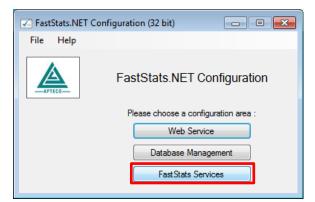
9. Click Finish.

Create Database Wizard	_		×
Step 5 - Create Database(s)			
Email Response Complete View Notes Copy Script	View Log		
	Run Scrij	pts Ca	ncel
		Back	Finish

3.2 Linking the Response Database to the FastStats Service

You need link the response database to the FastStats service.

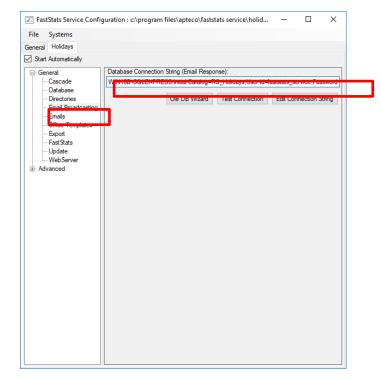
- 1. Open the FastStats Configurator
- 2. Select FastStats Services



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

FastStats.NET Services	Manager		_			Х
Manage Services						
Name	Status	Version	Query Component Version		St	
FastStats Service - Holidays	Running	1.3.17313.70 (Q4 2017)	5.6.2.18037		St	ор
					Res	tart
					Refres	sh (F5)
					Upd	late
					Prope	erties
					View	/ log
					Licer	nsing
<				>		

 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

Database Con	nection String (Email Response):	
	Ole DB Wizard Test Connection	Edit Connection String
	Database Connection	×
	Connection to email response database su	ccessful.
		ОК

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.

🚽 FastStats Email Response G	Gatherer x64 Setup	_		×
ĭ ≡	Welcome to the FastSt Gatherer x64 Setup Wi		Respo	nse
	The Setup Wizard will install Fast Gatherer x64 on your computer. Cancel to exit the Setup Wizard.			pr
	Back	Next	Cano	el

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

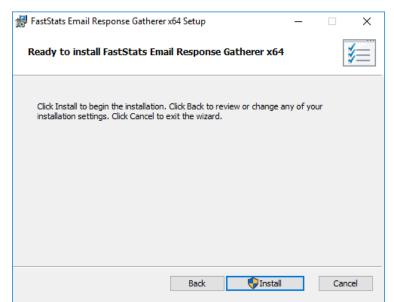
😹 FastStats Email Response Gatherer x64 Setup -	_		×
End-User License Agreement			<u>(</u>
Please read the following license agreement carefully			
			_
FASTSTATS END USER LICENCE AGREEMENT			^
This Licence Agreement is between Apteco Limited (in the appropriate context 'we', 'us' or 'our') and the or in the appropriate context 'your') of the FastStat ('Software').	user	('you'	
The copyright and intellectual property in the Softwar by Apteco. We offer you a non-exclusive and non-tr			
			~
\bigtriangledown I accept the terms in the License Agreement			
Print Back Next		Cano	el

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

😸 FastStats Email Response Gatherer x64 Setup		—		Х
Destination Folder				
Click Next to install to the default folder or click C	hange to choos	se another.	2	
Install FastStats Email Response Gatherer x64 to:				
C:\Program Files\Apteco\FastStats Email Respons	e Gatherer x64	۹\		
Change				
	Back	Next	Cano	el
	Duck	ICAL .	Cano	

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**

🙀 FastStats Email Response Ga	atherer x64 Setup	_		Х
¥=	Completed the FastStats I Gatherer x64 Setup Wiza		Respon	se
	Click the Finish button to exit the Set	up Wizard	I.	
	Back Finis	h	Cano	el

3.4 Creating the Response Gatherer Folders

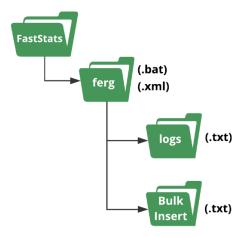
You will need to create folders to store the files to use with the Response Gatherer; these will include the following types of files.

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

Table 1 – Files Associated with the Response Gatherer

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

🗾 FastStats Email Resp	onse Gatherer	- 0	×
File Help			
Database			
Connection string :	Data Source=TD_WIN10_02\SQLExpress;Init	ial Catalog=RS_	Edit
Timeout (secs) :	0		Test
Bulk insert folder :			Browse
Send Email on Error	SMTP Properties		
PeopleStage connection s	ring :		Edit
Email Broadcaster			
Broadcaster : CleverRea	ch		~
Usemame : usernam	2		
Password : passwor	1		
Broadcast Parameters			
ACCESSTOKEN			∽ Add
	Value		
▶ ₩			
Missing mayind	ustor(n) :		
Missing required param			

Note:

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

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:
Password	The username and Password are not required with this integration

Table 2 – Email Response Config Parameters

Email Response Config dialogue with REQUIRED FIELDS completed

🔽 Fas	stStats E	Email Respor	nse Gatherer — 🗆	×
File	Help			
Databa	ase			
Conne	ction stri	ng :	Data Source=TD_WIN10_02\SQLExpress;Initial Catalog=RS_	Edit
Timeou	ut (secs)		0	Test
Bulk in	sert fold	er:		Browse
Ser	nd Email	on Error	SMTP Properties	
People	eStage c	onnection stri	ng :	Edit
Email E	Broadcas	ster		
Broado	caster :	CleverReach	h	~
Usema	ame :	username		
Passw	ord :	password		
Broado	cast Para	ameters		
ADDIT	FIONALF	IELDS		~ Add
	Parar	neter	Value	
•	URL		https://rest.cleverreach.com/v3/	
	CLIE	NTID		
	URINC	OLUMNNAME	Urn	
	DATE	OFFSET	0	
	ACCE	SSTOKEN		
			()) delimited list of the additional fields you wish to include in the Respon	se Details
			er, i.e. you can only specify fields that are included in the extract file.	

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.cleve rreach.com/v3/	The CleverReach log in URL that you use to access your account.
CLIENTID	Y		Obtained from CleverReach when you sign up
URNCOLUMNAME	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

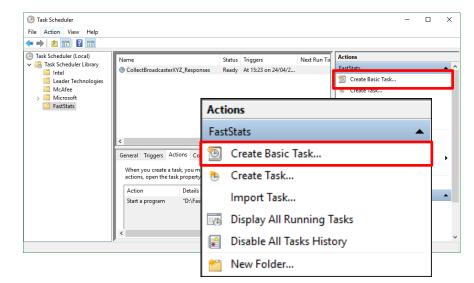
Тір

Search for Task in the Start Menu

	▣ □ ⊕	Filters \checkmark
	Best match	
0	Task Scheduler Desktop app	
	Apps	
	🧠 Task Manager	
	Search suggestions	
		>
ŝ		
54		
#		

The Windows Task Scheduler opens

2. Select Create Basic Task



Tip:

You can create folders to organise your tasks

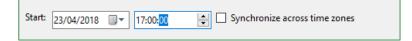
- 3. Create a Basic Task step
 - a. Give your task a Name and Description

Create Basic Task Wizard		×
Create a Basic Task	(
Create a Basic Task Trigger Action		d to quickly schedule a common task. For more advanced options or settings ple task actions or triggers, use the Create Task command in the Actions pane. CollectBroadcasterXYZ_Responses
Finish	Description:	Scheduled Response Collection for XYZ
		< Back Next > Cancel

- 4. Task Trigger step
 - a. Select the Trigger interval

Create Basic Task Wizard				×
Create a Basic Task	When do you want the task to start?			
Trigger	O Daily			
One Time Action	O Weekly			
Finish	O Monthly			
	One time			
	O When the computer starts			
	O When I log on			
	When a specific event is logged			
		< Back	Next > Cance	

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



5. Action step

a. Select Start a program and click Next

Create Basic Task Wizard				×
Create a Basic Task Trigger One Time	What action do you want the task to perform?			
Action	Start a program			
Finish	 Send an e-mail (deprecated) 			
	 Display a message (deprecated) 			
		< Back	Next >	Cancel
		< back	ivext >	Cancel

- 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.

Create Basic Task Wizard				2
Start a Program				
Create a Basic Task				
Trigger	Program/script:			
One Time	"D:\FastStats\FERG\Example Batch.bat"		Browse	
Action Start a Program	Add arguments (optional):		Example.xml	
Finish	Start in (optional):			
		< Back	Next > Ca	

7. Summary step – Click Finish

Create Basic Task Wizard		×
5 Summary		
Create a Basic Task		
Trigger	Name:	CollectBroadcasterXYZ_Responses
One Time	Description:	Scheduled Response Collection for XYZ
Action		
Start a Program		
Finish		
	Trigger:	One time; At 15:23 on 24/04/2018
	Action:	Start a program; "D:\FastStats\FERG\Example Batch.bat" Example.xml
	Open the	Properties dialog for this task when I click Finish
		ck Finish, the new task will be created and added to your Windows schedule.
		,,,,,
		< Back Finish Cancel

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

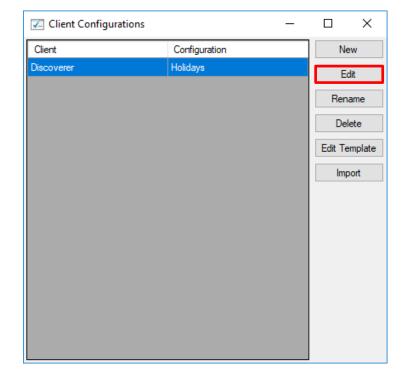
FastStats.NET Co	onfiguration (32 bit)	- • ×
File Help		
APTECO-	FastStats.NET C	onfiguration
	Please choose a confi	guration area :
	Web Servi	ce
	Database Mana	agement
	FastStats Ser	vices

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

Web Service Chooser	×
Web service configuration	
••••••	Edit
	OK Cancel

4. Click Client Configuration

			_	
🗾 FastStats Web Serv	rice Configuration	_		×
File Systems				
General Holidays				
Configuration Database	FS_Config		View log]
Number of Log Entries	144		Check cor	nfig
Log detail	Verbose ~	Clie	ent Configu	uration
Log Table Size	832 KB		Client Bina	ries
Log Rows to Keep	10.000			



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**

General	Appea	rance	Restrictions	Support	Plugins	Launcher	Network	Debug	Telemet	y	
Plugins								2			
	Enable	Plug	in Name								
	~	Apteo	co.Discoverer	.Plugins.(Cascade						
	~	Apteo	co.Discoverer	.Plugins.(Cluster						
	~	Apteo	co.Discoverer	.Plugins.l	DecisionT	ree					
		Apteo	co.Discoverer	.Plugins.l	ExternalLi	nks					
		Apteo	co.Discoverer	.Plugins.l	icensing						
		Apteo	co.Discoverer	Plugins.	Linkage						
	✓	Apteo	co.Discoverer	Plugins.	Мар						
	~	Apteo	co.Discoverer	.Plugins.l	Modelling						
	~	Apteo	co.Discoverer	.Plugins.l	ModelRep	ort					
	~	Apteo	co.Discoverer	.Plugins.	Profile						
		Apteo	co.Discoverer	Plugins.	SimpleMo	delling					
	v		co.Discoverer	-		-					
			co.Discoverer	-							
	v		co.Discoverer	-		iable					
			co Discoverer								
	✓		co.Discoverer.								
			co.Discoverer	-							
			co.Discoverer	-		Oynamics (
			co.Discoverer	-							
			co.Discoverer	-		ctions					
			co.Discoverer	-							
			co.Discoverer	-		d					
			co.Discoverer	-	-						
			co.Discoverer	-	-						
			co.Discoverer	-							
	v	Apteo	co.Discoverer	.Plugins.	Storyboar						

4.2 **Configuration in FastStats**

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

Vame Gli lew ut opy aste elete ename todify	obal	Modify Group Modify User Modify Access Rights Modify Disk Quotas			
ew ut opy aste elete ename	•	Modify Group Modify User Modify Access Rights			
ut opy aste elete ename	•	Modify User Modify Access Rights			
opy aste elete ename	•	Modify User Modify Access Rights			
aste elete ename	Þ	Modify User Modify Access Rights			
elete ename	ł	Modify User Modify Access Rights			
ename	F	Modify User Modify Access Rights			
	•	Modify User Modify Access Rights			
loally		Modify User Modify Access Rights			
		Modify Access Rights			
		Modity Disk Quotas			
		and the second state			
		Modify Ftp Connections			
		Modify Selection Properties			
		Modify Outputs			
		Modify Transferable Extensions			
		Modify Product Options			
	-	Modify Plugin Configurations Modify Row Filters			
		Modify Column Filters			
		Modify Roles			
		Modify Hyperlinks			
		Modify Velocity			
		Modify Capabilities			

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

Modify Plugin Configu	rations			
ool (20 items)			•	
Vizard (28 items)				
Plugin	A	Inherit		
Aggregation	Edit	\checkmark		
Assign Values	Edit	\checkmark		
Basket Analysis	Edit	\checkmark		
Best Next Offer	Edit	\checkmark		
Calculate Expression	Edit	\checkmark		
Cluster Model	Edit	\checkmark		
Combine Categories	Edit	\checkmark		
Count	Edit	\checkmark		
Create And Update	Edit	\checkmark		
Create From Cube	Edit	\checkmark		
Date Banding	Edit	\checkmark		
Decision Tree Model Output	Edit	\checkmark		~1.2
Drive Zone	Edit			Cle
Email Broadcasting (Predefined Fields)	Edit		>	
Email Broadcasting (User Defined Fields)	Edit			
Email Responses	Edit	\checkmark		
Import Data	Edit	\checkmark	*	

3.	Click Add	to	add	а	new	templ	ate
----	-----------	----	-----	---	-----	-------	-----

Email Broad	Jcasting >
Name	Email Broadcasting Visible In Toolbox
Tooltip Text	Upload selected records to your chosen Email Service Provider
Image Path	images\EmailBroadcastingWizard.jpg
Group	Output Wizards Order Within Group
	Group Order _5 🛧
	Name
Templates	
	Add
	OK Cancel

4. Enter a **Name**, select the appropriate **Resolve Table** from the drop-down and select **CleverReach**[®] from the Broadcaster drop-down.

	:				
Cleve	rReach				
Resolv	ve Table:				
Peopl	e 🔹				
Extras:	:				
_	caster:				
Cleve	erReach 👻				
Knowr	n Parameters:				
					^
OAu	uth Client Secret				
You	ur OAuth Client ID	*			
Red	lirect Uri				
http	ps:\\apteco.de			*	•
Acce	ess Token				
				Generate Token *	~
Additio	onal Parameters:				
Additio	onal Parameters: Key		Value		
Additio			Value		
			Value		
			Value		
*	Key		Value		
* Param	Key	Auth Client ID;OAuthClientSe		ctUri=http Pars	ie

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.

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-HHmmss		
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		

Table 4 – Edit Template Known Parameters Settings

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			
12345	*		
OAuth Client ID			
Your OAuth Client ID	*		
OAuth Client Secret			
Your OAuth Client ID		*	
Access Token			
Access Token			
			Generate Token 🔹

2. Click Generate Token

The following dialogue opens

Warning: The app has not officially been approved by CleverReach [®] .	×
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 People Stage 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	-
Close Cance	9

	Clever Re	each 🛹	
	your CleverReach® a		onnect
your	Apteco PeopleStage	2017-Q4:	
Customer ID	72759		
Customer ID User name	72759 admin		

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

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)

E New Selection 3	
Summer List	People
	間 e囲 Add User Code マ 🏭 Rows To Browse マ 🗐 マ 🕪 マ 杼 マ
Data Grid *	
Grid	Chart
Drag a column header here to group by that colum	nn.
Person URN 7 Title 🕫 Initial 🕫 Surname 🕫 Email	Address #
4	۲ ۲
Cover Selection * Data Grid *	

2. Click the Email Broadcasting icon

New Selection 3				/		
Summer List					Peo	ple
📑 🗗 🖬 🗇	I ∰ Not	es + 💷 🗉	1 🖂 🕯 🖻	\		
						le 🔹 🏭 Rows To Browse 👻 🗐 🖉 🐨 🖻 🕶
Data Grid						Ŧ >
		Grid				
Drag a columr	header	here to g	roup by that	t column.		
Person URN 7	Title 🕫	Initial 🕫	Surname 🕫	Email Add	dress 🕫	
EllieHolderness	Miss	E	Holderness	ellie.test@	bubb	
Jessica Holder	Mrs	J	Holderness	jessica.tes	t@bu	
RileyHoldern	Mr	R	Holderness	riley.test@	bubb	
RobinHolder	Mr	R	Holderness	robin.hold	ernes	
JaneHolderne	Mrs	J	Holderness			
SimonHolder	Mr	ç	Holderness	simon hol	derne	• •
						Browsing first 1,000 People
Cover Selection	Data Gri	id				
						86 Peopl

The Email Broadcasting Wizard opens

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

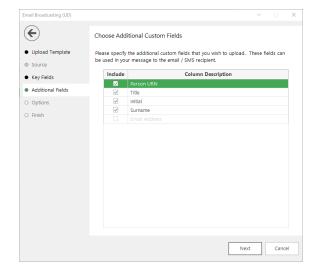
Note: The wizard will omit this step if you have only one Upload Template

Email Broadcasting	- 0
	Choose Upload Template
 Upload Template 	This wizard uploads a selection to your email broadcaster. Select the upload template
O Source	that you wish to use using the drop down list below.
O Key Fields	You can get a detailed description of the template by selecting and reading the
O Additional Fields	information below.
O Options	CleverReach 🔹
O Finish	
	Next Cancel

4. Choose the email field and click Next

Email Broadcasting (UD)			-		×
¢	Choose Key Fields				
 Upload Template Source 	Please specify the key fields for the data that either choose an email address, an SMS phor		oad. You	can	
Key Fields	Select the field that contains the email addres address field then please choose None.	s. If you do not have	e an email		
O Additional Fields	Email Field	None			•
O Options O Finish	Select the field that contains the SMS phone n phone number field then please choose None SMS Field				
		N	ext	Can	cel

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



mail Broadcasting (UD)		- 🗆
€	Email Broadcasting Details	
 Upload Template 	Please enter your credentials for upl	loading your records to the broadcaster.
Source	Username	aptecouser
Key Fields	Password	****
Additional Fields	Enter the details for this list. If you check the overwrite box.	want to overwrite an existing list, ensure that you
Options	List Name	Summer List
O Finish	 Overwrite an existing list 	
	Message Name	Summer Promotion Q -
	A copy of the list will be saved to the	e directory below.
	Private:\Summer List.csv	Browse
	When the list has been processed and confirmation email to the address b	nd is ready, the broadcaster will send a elow.
	Email Address	info@apteco.com
		0%
		Finish Cance

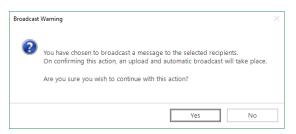
6. Complete the **Email Broadcasting Details** form then click **Next**

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.

Email Broadcasting (UD)	- 🗆 X
e	Results
Upload Template	Wizard Action Complete
Source	
Key Fields	Your list has been successfully uploaded to your broadcaster. It may take a while for them to process this list and make it available to you.
Additional Fields	
Options	Records Uploaded: 1
• Finish	
	Finish Cancel

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**

Email Responses	:
	Choose Message
Message	This wizard will show information on the responses to an email broadcast campaign and allow you to create a virtual variable from this information.
O Information O Email Variable	Please enter the name of the message you want to get information for:
O Folder	Summer Promotion
O Add Notes	
) Name	
O Security	
O Finish	
	Next Cancel

 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

mail Responses		:
(Message Response Information	
 Message 	This is the response information for me	ssage:
Information	Sum	mer Promotion
 Email Variable Folder Add Notes Name Security Finish 	Unopened Bounced Opened Clicked through Opted in Opted out Would you like to create a variable cor I Create a virtual variable from this inf	
		Next Cancel

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

	Choose Variable
	Please specify the Email or SMS variable that was used to send the message with.
	Drop your variable here
Email Responses	- 🗆 X
¢	Choose Variable
 Message 	Please specify the Email or SMS variable that was used to send the message with.
 Information 	Email Address
Email Variable	
O Folder	
O Add Notes	
O Name	
O Security	
O Finish	
	Next Cancel

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

Email Responses	- 🗆 X
€	Choose Folder for Variable
 Message Information Email Variable 	Select the folder where the new variable will be created from the list below. System Folders A D ApteconsLIVE
Folder	🗁 Household
O Add Notes O Name O Security O Finish	 Person Company Socials Shows Communications Journey History Email Responses Others
	You can also right-click on a folder to add a new folder, or rename and delete the folder you have added. Variables cannot be created directly in the root, so these will be added to the 'Others' folder.
	Next Cancel

- Email Responses
 –
 X

 Imail Responses
 –
 X

 Add Notes to Variable

 Information

 Email Variable

 Folder

 Add Notes

 Imail Variable

 Folder

 Name

 Security

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

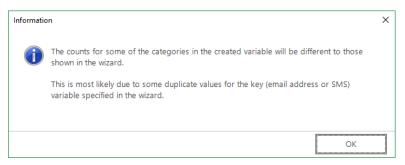
7. Enter a Description for the virtual variable or drag an existing virtual variable onto the drop box if you wish to overwrite it. Modify the Security Attributes if applicable and then click **Next**

Next

Cancel

Email Responses	- 🗆 X
¢	Choose Variable Description
Message Information	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.
Email Variable	Description Summer Promotion Response
Folder	Alternatively you can choose to overwrite an existing virtual variable with these new values. Drag the variable to be overwritten onto the panel below.
Add Notes	
Name	Drop the variable to overwrite here
O Security	If you want to create a URN Snapshot of this variable (so that it will be recreated to contain exactly the same records after a system refresh) check the checkbox.
O Finish	Create URN Snapshot
	If you wish to change the security attributes for this variable for yourself, your group or other users check the checkbox below.
	Modify Security Attributes
	0%
	Next Cancel

8. Click **OK**



9. Click Finish

Email Responses	- 🗆 X
€	Results
 Message Information Email Variable 	Wizard Action Complete This wizard has completed performing the requested actions. The effected variable has been highlighted in the System Explorer.
FolderAdd Notes	Records Updated:38Codes Updated:0
Name	If you wish to start a new selection with this variable, check the box below.
Security	Show new variable as a selection
Finish	Click 'Finish' to exit this wizard.
	You can also choose to refresh this variable on a schedule. Please press the button below to bring up the schedule editor.
	Finish Cancel

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[®].

 Open PeopleStage, select *File > Administration > Channel Editor*. Click Add Email Channel through the context menu within a folder

Add >	Add Folder
Copy Channel	Add Email Channel
Paste Channel	Add File Channel
Faste Chamler	Add FTP Channel
Import	Add Push Notification Channel
Export	Add Facebook Channel
Delete Channel	Add Twitter Channel
	Add Google Channel
	Add Microsoft Dynamics Channel
	Add SalesForce Channel

2. Enter a name in Channel Name

	There are validation errors indicated in red	Refresh Editor	Save & Close
Channel Settings Output Setting	s File Settings Parameter Settings Additional Variables Cost Settings		
Channel Name:	Email - CleverReach		
Allow In Transactional Output:	Never		
Allow in Hansactional Output.			
	Test Login		
	Test Broadcast		
Errors			
<u> </u>	een specified in the channel or delivery grid		
	ts has no value set for Username ts has no value set for Password		
This channel or one of its paren	its has no value set for Password		

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®

				There are v	alidation error	s indicated in red	Refresh Editor	Save & Close
Channel Settings Output	t Setting	s File Settings Pa	rameter Settings A	Additional Varia	ables Cost Sett	ings		
Broadcaster:	Clever	Reach						
Username:	apiuse							
Password:	•••••	•••••						
Email Variable								
Variable	Name:	Email Address (Pe	eEmailA)					• Clear
Variable Description Ov	verride:	Email						
SMS Variable								
Variable	Name:	Select a Variable						Clear
Variable Description Ov	verride:							
Reply Email Address:	tony.dz	umaga@apteco.c	om					
Reply SMS Number:								
Upload but don't bro	adcast							
Append to List								
Number of Retries:								0
Response File Key Type:	Urn wi	h Broadcast Id						
Message Content Type:	Broade	aster Template						
Errors								
Parameter ClientID has r								
Parameter AccessToken	has no	/alue set						

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 Out	put Settings File Settings Parameter Settings Additional Variables Co	ost 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 h	as no value set		
Parameter FTPUserna	ime has no value set		
Parameter FTPPasswo	ord has no value set		

Note:

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

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

	▼ Add
Parameter Name	Parameter Value
Client ID	
Access Token	
Uri	https://rest.cleverreach.com/v3/
Subject	
Message Retrieval Period	24M
Use Dated List	True
Encoding	UTF8
Urn Field Name	

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

	Variable Name	Variable Descripti 🝸	Output Type	Formatting	Unclassified as bl
	Forename (PeForena	First Name	-	No Formatting	-
	Select a Variable 🔹		-	-	-
	Household				
	Person				
	 Company Socials 				
	Shows				
	 Communications 				
	 Journey History 				
	Email Responses				
	 Others 				
	Add Additional Variable	s Directly			
Addi	itional Variables Locatio	n:	End		
	Errors				

6. Add any additional variables on the Additional Variables tab

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

	Variable Name	Variable Descriptio	Output Type	Formatting	Unclassified as bla
	Forename (PeForena)	First Name	-	No Formatting	-
	Surname (PeSurnam)		-	No Formatting	-
7	Click here to add new i	tem	1		
7	Click here to add new i		-		

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

C Library	
Q	
Sort By Description	Ð
- Deliveries	
New Delivery	
Channels	
🗸 🚰 Channels:\Email	
Email - CleverReach	
00	

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.

	Delivery	
r'o::	Email - CleverReach	
Message Name: Kunden-N @ Kunden-Newsl List Name:	Vewsletter - Juni 2019 etter - Juni 2019	••••••••••••••••••••••••••••••••••••••
Upload and automatically		14

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 <u>https://support.cleverreach.de</u>

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

Cle	everReach 🛹
Customer ID	
User name	
Password	
	Login
	Login Forgot login details

2. The CleverReach dashboard opens

CleverReach	Dashboard					
🖀 Dashboard	Reports			News		
嶜 Recipients	Traum von Urlaub#20190625-162809 Sent on 25.06.2019 17.29	0% Open rate	0% Click rate	25.05.2019 More time for vacation automation!	thanks to email	NEW
🖂 Emails	Partner-Newsletter - Juni 2019 Sent on 25.06.2019 14.04	33% Open rate	10% Click rate	28 05 2019 One year #GDPR: Interv Schmidt	view with Christia	n
4 Autoresponder	Traum von Urlaub#20190618-120630 Sent on 18.06.2019 12:07	50% Open rate	50% Click rate	This week	Campaign	n Calendar
🚓 Automation THEA	Traum von Urlaub#20190618-085557 Sent on 18.06.2019 08:57	80% Open rate	25% Click rate	21	6 Clicks	
My Account	Traum von Urlaub#20190618-022030 Sent on 18.06.2019 02:21	50% Open rate	50% Click rate	Opens	CIRKS	
Agency Free				Тор 5		
📥 Profile 🛛 Help «	Growth			FERGE Test Follow Up Mess Sent on 18.02.2019 15.13		100% ipen rate
	720 530 540			Segmüller - Küche#2019031 Sent on 13.03.2019 15:47		100% open rate
	380 770 Jan 2019 Feb 2019 Mar 2019 Apr 2019	May 2019	Jun 2019	Sportscheck Demo Man#20 Sent on 15.03.2019 11:53		100% open rate
	Subscriptions 📕 Imp		isting recipients nd: 24.06.2019 21:03	Sportscheck Demo Man#20 Sent on 19.03.2019 13:14		100% pen rate
C Support	The CleverReach® Referral Program			Test for LEW#20190319-150 Sent on 19.03.2019 16.06		100% Iden rate
	Recommend CleverReach® to friends, fellows and business par	nerst We will give	you 20%		0	periodic

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 ClevrerReach[®], 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.cleve rreach.com/v3/	The CleverReach log in URL that you use to access your account.
CLIENTID	Y		Obtained from CleverReach when you sign up
URNCOLUMNAME	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.

	Required	Response Table field	CleverReach® extract file column
EMAILCOLUMNNAME	N	Email	Email address
COMMUNICATIONKEYCOLUMNNAME	N	CommunicationK ey	FastStats Communication Key. Only be available if it has been previously uploaded from FastStats
RUNCOLUMNNAME	Ν		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	Ν	DeliveryDate	Delivery date
CLICKURLCOLUMNNAME	Ν	ClickUrl	The name of the URL that was clicked
CLICKDATECOLUMNNAME	Ν	ClickDate	Date the link was clicked
Eventtriggereddatecolumnnam E	Ν	EventTriggeredDa te	Date the response occurred
ADDITIONALFIELDS	Ν		Allows you to specify a pipe (I) 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	Ν	UnixTimeStamp	Date format used e.g. dd.MM.yyyy HH:mm
EXECUTIONBUFFER	Ν	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	Ν	false	False will force the Email Response Gatherer to download a full list of Broadcast Ids from all

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

			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	Ν	IМ	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	Ν		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).
ONLYPROCESSRECORDSWITHBROAD CASTID	Ν	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}/recei vers. Maximum 5000.
REMOVEFILES	Ν	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	Ν	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	Default	Description
	Y/N		
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	Ν	true	Setting this to false will remove the date and time stamp at the end of the file name
DatedListFormat	Ν	yyyMMdd- HHmmss	
From Email	Ν		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	Ν	true	Set this to false if you wish to prevent empty list being uploaded to CleverReach®
Email Field Name	Ν		Email *
SMSFieldName			The name of the field in CleverReach® that will hold the mobile number
UrnFieldName	Ν		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	Ν	10	
Message Retrieval Period	Ν	١M	
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 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 <u>Scheduling the Response Gatherer</u>

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.

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