



INFORMZ USER GUIDE

Aptify Integration

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INTRODUCTION

The **Informz for Aptify** integration provides an effective way to harness the strengths of Aptify and Informz for effective and efficient eMarketing campaigns. Informz provides valuable deliverability services, advanced reporting, and campaign consultation from a dedicated Informz eMarketing Advisor.

The integration centers on the use of **campaigns** in Aptify as the source of email addresses for Informz to send to. An Aptify campaign also receives the mailing information sent from Informz as part of the **writebacks** provided in this integration.

INTEGRATION OVERVIEW

The Informz for Aptify integration delivers the following functionality:

1. Retrieve a list of campaign prospect list views from Aptify
2. Sync target groups, which includes Aptify campaign prospect list view details and counts
3. Use Aptify fields for personalization of Informz mailings
4. Perform unsubscribe and resubscribe writebacks
5. Writeback sent and opened mailing activity

For this integration, Aptify users create **campaign prospect lists** of email recipients. These prospect lists are automatically refreshed every night (based on the scheduled task frequency) by a **process flow** in Aptify. A prospect list can also be manually refreshed at any time using the Aptify user interface.

ACCESSING APTIFY

Aptify can be accessed using **Aptify Web** (browser-based client) and **Aptify Smart Client** (desktop client). Aptify Smart Client is accessed using remote desktop (RDP). The web client is used with Google's Chrome browser.

Please note that some Aptify administrator-level features are not available on Aptify Web since Aptify Web is more end-user focused. Also make sure that all of the required integration components have been installed in Aptify for the Informz integration. Please consult the **Aptify Informz Integration Installation Guide** for full details.

INFORMZ TARGET GROUP FOLDERS

Newly created campaign prospect list views coming into Informz as target groups are initially placed in the **Aptify** folder in Informz. These target groups can be moved to different folders based on a user's preferences.

APTIFY CAMPAIGNS AND INFORMZ

The integration leverages Aptify campaigns as the basis to create target groups in Informz.

There are four distinct steps to construct a campaign in Aptify so that Informz can use it as a target group:

1. Create a view
2. Create a campaign
3. Associate the view to the campaign using a segment
4. Use the campaign list builder wizard to populate the prospect list once

Alternatively, a prospect list can be manually created without using campaign segments. This works fine with the integration; however, these manual lists are static. Please be aware of this limitation if using prospect list without campaign segments.

Note: If using Campaign Segments, the prospect list will be update based on the frequency of the scheduled task that was set during the initial setup. For more information, refer to the Aptify Informz Integration Installation Guide.

CREATING A VIEW IN APTIFY (1)

An Aptify **view** is the foundational piece to create an Aptify campaign ultimately used by Informz. A view is a query that identifies those **persons** in Aptify that would be appropriate **members** in a campaign.

To create a **Persons View** in Aptify:

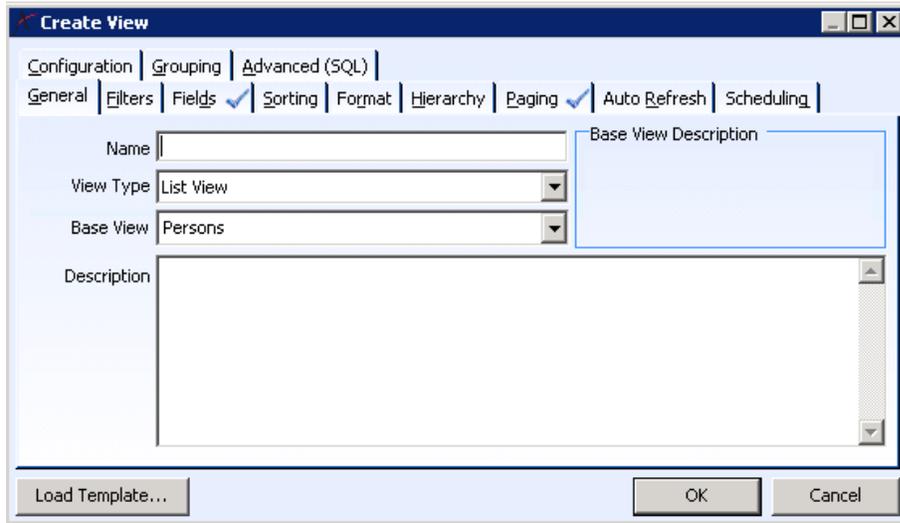
- Using either the left panel folders or the topline menu, select the **Customer Management** application
- Navigate down to **Persons** service



- Create a new view. This can be accomplished by using the icon



- Fill in the prompts on the *Create View* dialogue box. Ensure that **View Type** is set to *List View* and **Base View** is set to *Persons*.



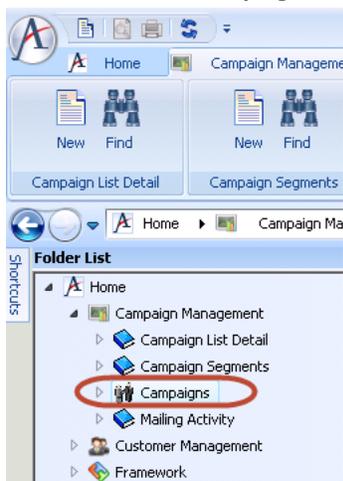
- Use the **Filters** tab to provide criteria for the view.
- On the **Fields** tab select *ID* and *Primary Email*. Any other fields are disregarded by Informz.
- **Save** the view.

CREATE A CAMPAIGN IN APTIFY (2)

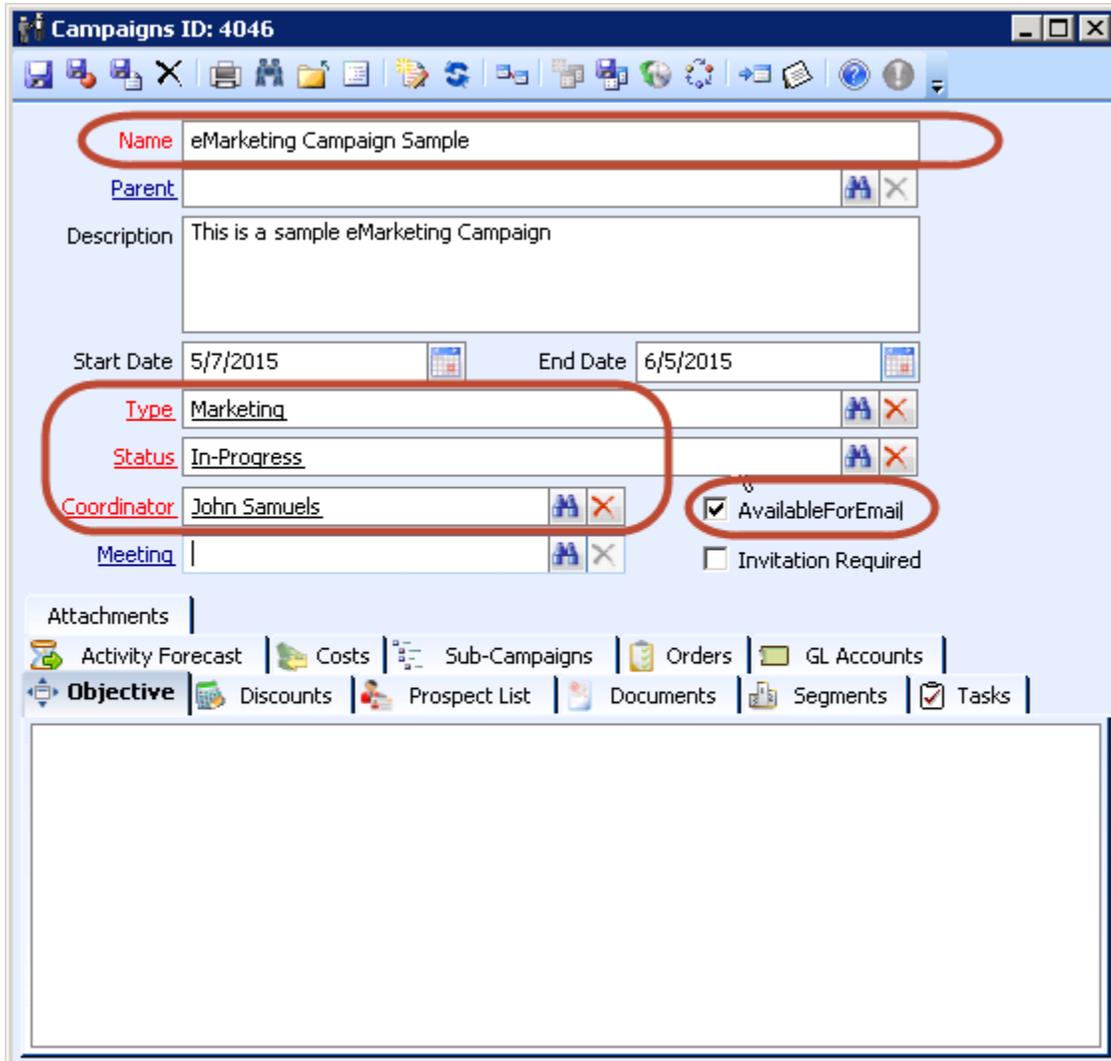
An Aptify campaign serves as the organizing structure for a communications campaign. A campaign contains a **segment**, connected to a **view**, to hold the people (email addresses) to be communicated to. The best approach is to use a segment in Aptify so that the prospect list can be dynamically updated.

To create a campaign in Aptify:

- After having created a view to use, navigate to **Campaign Management** application from either the left panel or the topline menu. Further navigate down to **Campaigns** service.
- Click on the **New Campaigns Record** icon (upper left corner quick access toolbar) to create a new campaign



- Enter the required information:
 - **Name** field: Enter desired name for the campaign
 - **Type** field: Set the desired campaign type
 - **Status** field: Set the status as *In-Progress*
 - **Coordinator** field: Set the desired coordinator for the campaign
 - **IsAvailableForEmail** field: Field should be checked in order to make the campaign available for Informz



- **Save** and **Close** the record

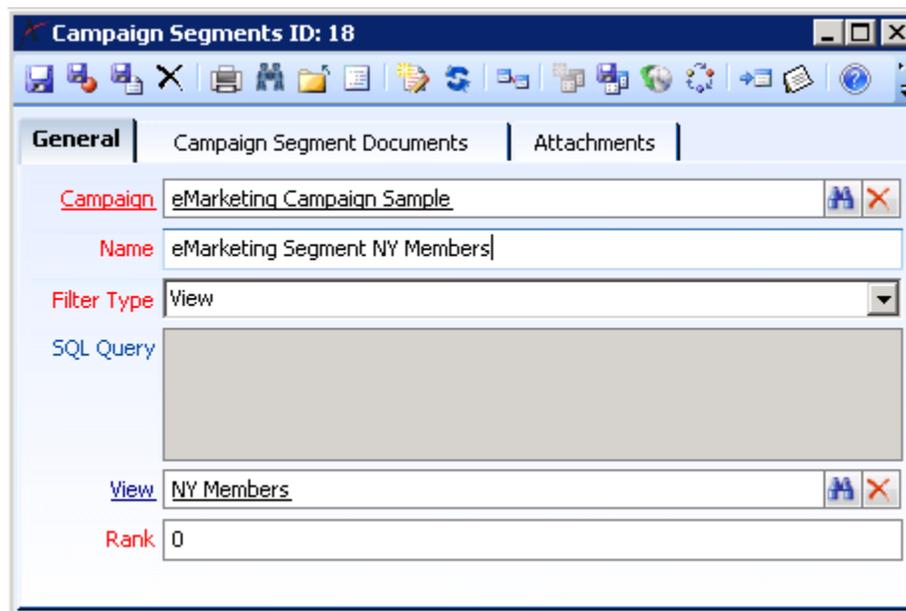
Note: For more details on campaign creation, please see Aptify's Campaign Management Guide.

CREATE A CAMPAIGN SEGMENT (3)

An **Aptify campaign segment** is used to populate the prospect list, via views or defined SQL. It allows the prospect list to be dynamically updated based on the changes happening to the view results.

To create a campaign segment in Aptify:

- After having created the required view and campaign, open the campaign that was created in the previous step
- Navigate to the **Segments** tab on the **Campaign** record
- Click on the **New Record** icon, shown on the top left of the **Segments** tab
- Enter the required information:
 - **Name** field: Enter desired name for the campaign segment
 - **Filter Type** field: Select *View* from the drop down list
 - **View** field: Enter the view name that was created in Step 1



The screenshot shows a web application window titled "Campaign Segments ID: 18". The window has a standard toolbar with icons for save, delete, print, and other actions. Below the toolbar are three tabs: "General", "Campaign Segment Documents", and "Attachments". The "General" tab is selected. The form contains the following fields:

- Campaign:** eMarketing Campaign Sample
- Name:** eMarketing Segment NY Members
- Filter Type:** View (selected from a dropdown menu)
- SQL Query:** (empty text area)
- View:** NY Members
- Rank:** 0

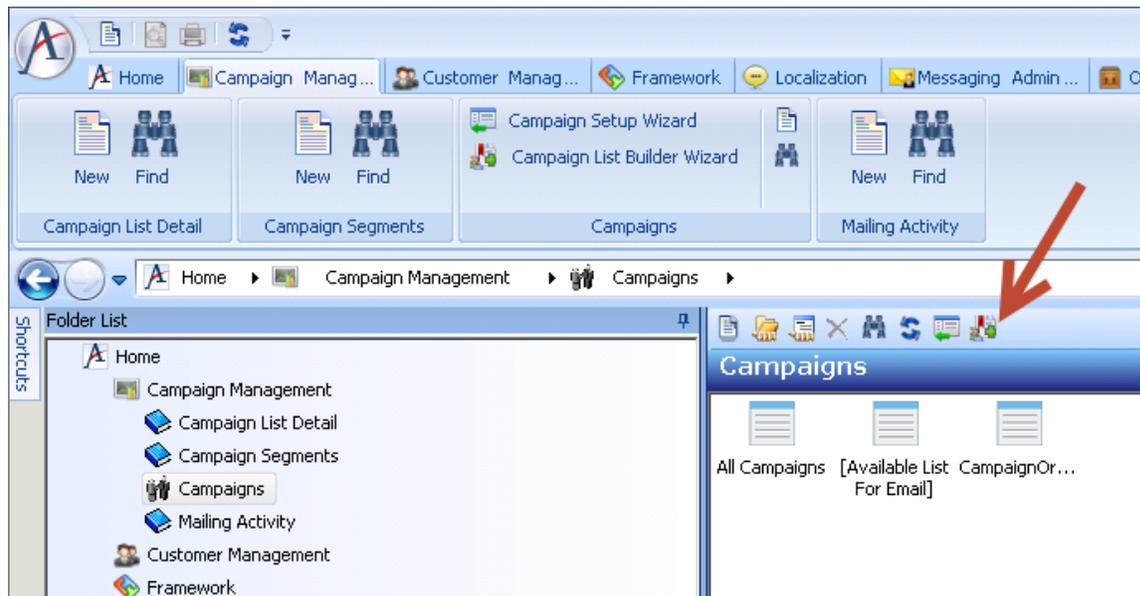
- **Save** and **Close** the record

RUN THE CAMPAIGN LIST BUILDER WIZARD (4)

The campaign list builder wizard is used to create/update prospect list based on the view associated with the campaign segment. Please note that the prospect list is created/updated automatically when the scheduled task has run. It is not necessary to run the campaign list builder wizard manually, but doing so populates the prospect list immediately instead of waiting for the scheduled task to run.

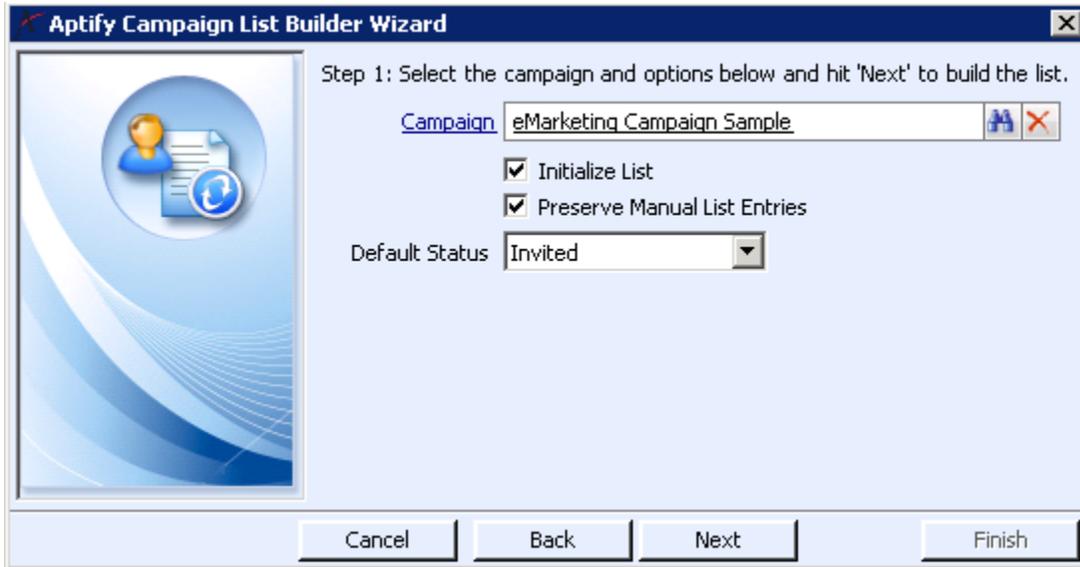
To run the campaign list builder wizard in Aptify:

- Navigate to the **Campaign Management** application
- Navigate further to **Campaigns** service
- Click on the **Campaign List Builder Wizard** icon



- Enter the name of the campaign that was just created

- Select the desired **Default Status**



- Click **Next** and **Finish** to run the Wizard

This process populates the prospect list of the campaign based on the associated view to the campaign segment. Please refer to Aptify’s Campaign Management Guide for additional details on campaign list builder wizard.

APTIFY EMAIL FUNCTIONALITY

Aptify has built-in email functionality as part of its baseline product. This can be used to send a mailing to a single contact or a list. These mailings can either be marketing oriented or transactional, (e.g. an acknowledgement of a purchase or an event registration). This functionality remains enabled in Aptify.

CREATING MAILINGS

The user must utilize Informz to create templates and mailings, test and send mailings, and view reports on subscribers and mailings.

SYNC

Sync is the term used to describe the process by which Informz receives information from Aptify. There are two types of syncs in this integration:

- Retrieving the list of Aptify campaign prospect list views
- Retrieving the subscribers for a particular campaign prospect list view from Aptify

SYNC TRIGGERS

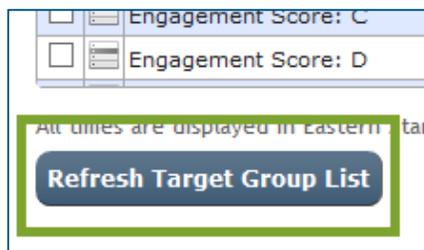
There are four events that trigger a **sync** between Informz and Aptify:

- User clicks the **Refresh Target Group List** button for an Aptify target group
- User clicks the **Refresh Target Group List** button on the Bridge Configuration page
- User clicks the **Info** menu option on the Target Group List Page
- User sends a mailing to an Aptify target group

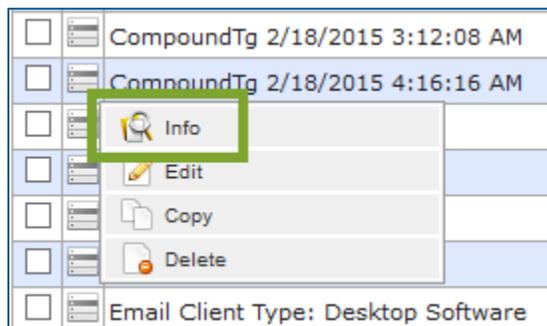
SYNCING THE LIST OF CAMPAIGN PROSPECT LIST VIEWS

This process retrieves all active campaign prospect list views from Aptify.

By clicking the **Refresh Target Group List** button, Informz requests the campaign prospect list views from Aptify. This can be done on the **Target Group** page by going to *Subscribers > Groups > Target Groups > Aptify*, or on the **Bridge Configuration** page (*Admin > Setup > Bridge Configuration*).



This does **not** update the counts for campaign prospect list views. That occurs by using the **Info** menu option on a specific target group.



Note: Keep in mind the timing as to when the scheduled task runs. If the scheduled task has not yet run, clicking any of the refresh or resync options in Informz will not alter the subscribers in the target group.

FOLDERS

Newly created campaign prospect list views coming into Informz as target groups are placed in the **Aptify** folder in Informz initially. These can be moved to different folders based on a user’s preferences.

SYNCING SUBSCRIBERS

Syncs occur for an individual target group. This process retrieves all the customer records from Aptify for that specific campaign prospect list view.

VIEW LIST OF SUBSCRIBERS

Upon clicking the **Info** menu option, as shown above, the list of individual subscribers displays:

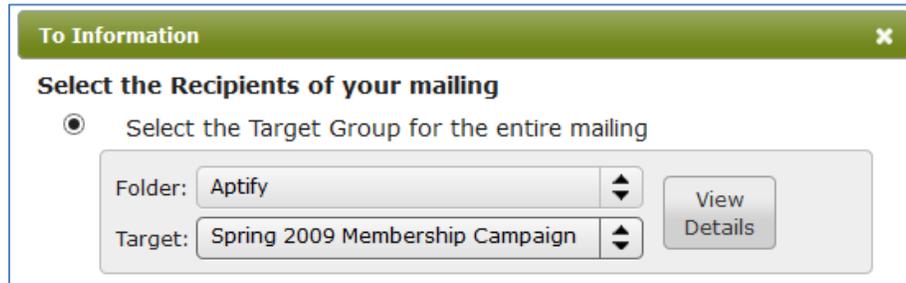
Email	Subscribe D	Persona	Engageme	Remote Id	Modify Date
0@email.com	2/16/2015 5:	Subscriber	F	62001497	
05hequ@wiwi.uni-mue	2/16/2015 5:	Subscriber	F	10647	
10248@mm.gov.om	2/16/2015 5:	Subscriber	F	10600500	
10606@mm.gov.om	2/16/2015 5:	Subscriber	F	11187200	
10616@mm.gov.om	2/16/2015 5:	Subscriber	F	10600400	
10706@mm.gov.om	2/16/2015 5:	Subscriber	F	11187300	

The *Remote ID*, which is the Aptify *Person ID*, can be included as a visible column in Informz for on-screen viewing. Sometimes this is helpful when trying to ensure that you are looking at the correct person record in Informz.

Remote Id	Email
10647	05hequ@wiwi.uni-muenster.de
62001723	0l9jx1d90hzhp6io@my10minut
10600500	10248@mm.gov.om

SENDING TO AN APTIFY TARGET GROUP

Sending a mailing to an Aptify list is very simple. First, select a *Folder* in the top dropdown, and then select the appropriate target group in the second dropdown.



The screenshot shows a dialog box titled "To Information" with a close button (X) in the top right corner. Below the title bar, the text "Select the Recipients of your mailing" is displayed. A radio button is selected next to the text "Select the Target Group for the entire mailing". Below this, there are two dropdown menus: "Folder:" with the value "Aptify" and "Target:" with the value "Spring 2009 Membership Campaign". To the right of these dropdowns is a button labeled "View Details".

DEFAULT PERSONALIZATION FIELDS

Informz has access to the following default fields from Aptify for customers to use for personalization:

Questions: Birth Date

- City
- Company
- Company City
- Company Phone
- Company State
- Country
- First Last
- First Name
- Last Name
- Member Type
- Membership Expiration Date
- Membership Status
- Membership Years
- Nick Name
- Outstanding Orders/Balance Due
- Primary Email
- Primary Phone
- Recent Expired Subscription
- Recent Order ID
- Recent Subscription ID
- Salutation
- State
- Title
- Upcoming Meeting
- Upcoming Registered Meetings
- Website
- Zip Code

These personalization fields from Aptify can be changed in Informz as follows:

1. Go to *Admin > Setup > Bridge Configuration*
2. Click on the *List of Attributes (also leads to edit)* link
3. Click on the *Edit* link for the attribute you want to alter
4. Type in new *Internal Name, Comment, Display Name* or *Personalization Default*

The *Personalization Default* is used whenever no value exists for the Customer when the personalization field is used in a mailing. The field populated in the mailing is defaulted to what is entered here.

The *Data Element* is the Aptify name of the field, so it cannot be changed in Informz.

If the client does not wish to use a particular piece of data from Aptify for personalization, they uncheck the *Attribute Use "Personalization"* checkbox.

Attribute	
Attribute Use	<input checked="" type="checkbox"/> Personalization
Internal Name	First Name
Comment	
Data Element	firstName
Is Valid	<input checked="" type="checkbox"/>
Display Name	First Name
Personalization Default	Friend
Submit	

If more personalization fields are needed this can be accommodated. Identify the desired fields and then contact your Aptify administrator. The administrator must alter the **base view** (vwPersonCampaignDetails under Campaign List Detail entity) to now include these new fields.

INSERTING A PERSONALIZATION FIELD IN A MAILING

A personalization field is selected from the Personalization toolbar tool. The personalization code has the format of `%%WSI | FIELDNAME%%`. The data to populate the code is retrieved from Aptify during the **Mailing Send** process. Personalization data is **not** stored locally in Informz. This data is gathered from Aptify just before the sending of a mailing.

WRITEBACKS

Writebacks can be viewed from the **Bridge Configuration** page by going to *Admin > Setup > Bridge Configuration* and clicking the *Writeback List* link. This shows pending, completed, and failed writebacks.

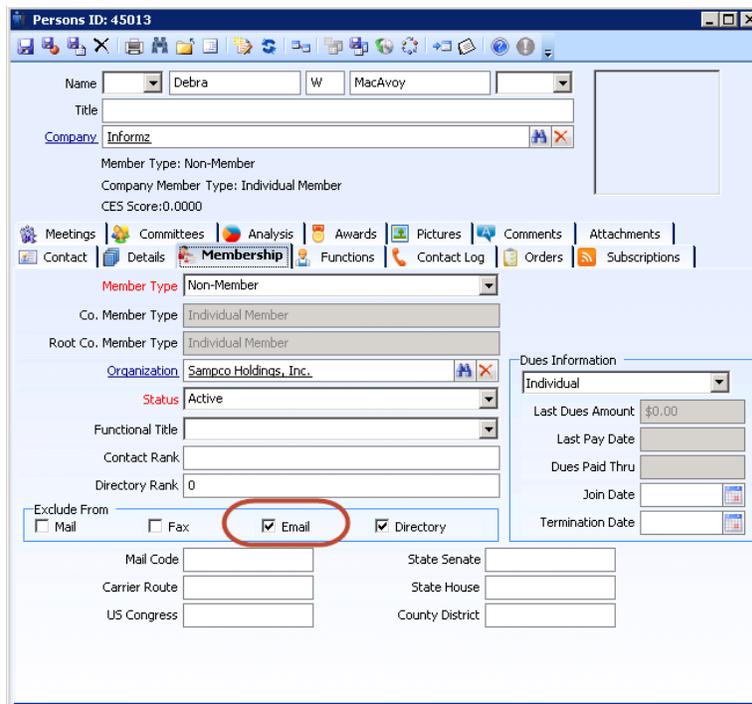
Writeback Message Queue				Status Show All <input type="button" value="v"/> Type Show All <input type="button" value="v"/> Max Records 100 <input type="button" value="v"/>		
ID	Type	Status	Description	Created	Last Sent	Control
84483	BadEmail	Error	Bad Email: no email address Reason: Invalid Email Address	3/24/2015 12:03:05 PM	3/24/2015 12:13:07 PM	Retry
84482	BadEmail	Error	Bad Email: no email address Reason: Invalid Email Address	3/24/2015 12:03:05 PM	3/24/2015 12:13:07 PM	Retry
84481	Unsubscribe	Sent	Unsubscribe Request: Reason: Invalid Email Address	3/24/2015 12:03:02 PM	3/24/2015 12:03:49 PM	
84480	Unsubscribe	Sent	Unsubscribe Request: Reason: Invalid Email Address	3/24/2015 12:03:02 PM	3/24/2015 12:03:35 PM	
84479	Unsubscribe	Sent	Unsubscribe Request: Reason: Unsubscribed from remote system	3/24/2015 12:03:02 PM	3/24/2015 12:03:22 PM	

Please note that Aptify has a 50-character limit on the length of the mailing name. If the mailing name exceeds 50 characters it will be truncated at 50.

UNSUBSCRIBE

If a customer unsubscribes via a link in an Informz mailing, that unsubscribe is logged in Informz and also stored in a queue to be sent back to Aptify. The database is polled every ten minutes, looking for new unsubscribes for writeback.

This action checks the **Exclude from Email** checkbox in Aptify.



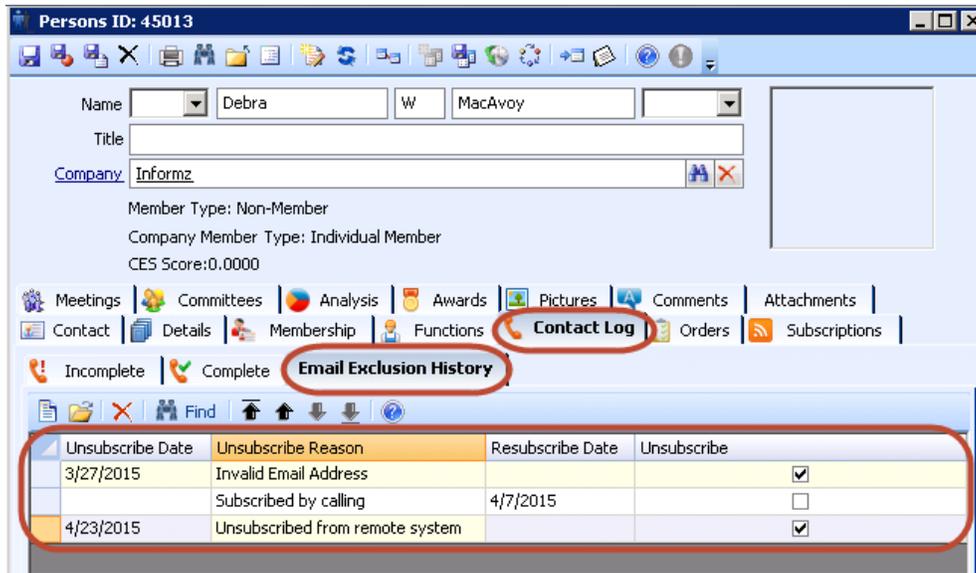
A malformed, or “bad,” email address will be considered undeliverable and then be unsubscribed.

RESUBSCRIBE

Any time an Informz admin manually resubscribes a subscriber, a writeback is created. Resubscribes are stored in a queue. The database is polled every ten minutes looking for new resubscribes to be sent back to Aptify. The following data is sent:

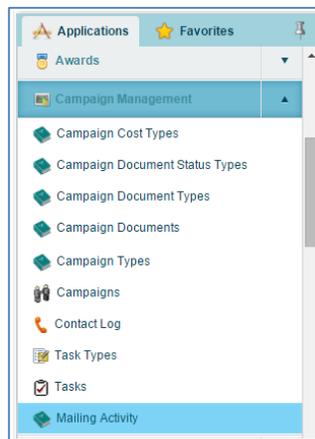
- NOTE: The resubscribe needs to occur where the unsubscribe originally occurred. If a Customer unsubscribes via an unsubscribe link in an Informz mailing, the resubscribe must occur in Informz.
- If a Customer was unsubscribed in Aptify by setting the “Exclude the recipient from all communications” flag to be set to TRUE, the resubscribe must occur in Aptify, and then Informz is updated during the next sync.

All the information related to subscribe/unsubscribe history of a person will be tracked back in Aptify under **Email Exclusion History** tab, under **Contact Log** tab of a Person’s record.



MAILING ACTIVITY

The Informz for Aptify integration supports mailing activity writebacks from Informz to Aptify. This allows Informz data to be included in advanced reporting and analysis using Aptify’s tools. Select **campaign management** and then **mailing activity** from the applications shortcuts to see this data.

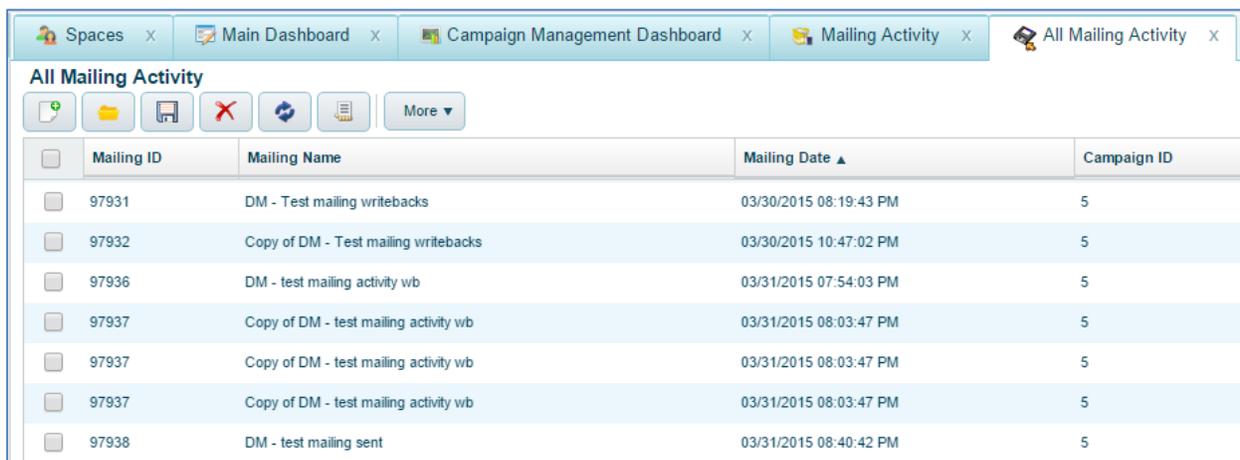


There is **mailing level** information, for a single mailing, and **subscriber level** information for the various engagement activities performed by a subscriber for a single mailing. Currently the activities written back are sent, opened, clicked, and bounced. The timing of the writebacks and the activities sent are managed by an administrator using the bridge configuration page in Informz.

Mailing activity writebacks can be completely disabled by an admin unchecking the **Enable Mailing Activity Writeback** option on the bridge configuration page.



All of the mailings can be viewed from the **mailing activity view** in Aptify

A screenshot of the "All Mailing Activity" view in Aptify. It shows a table with columns for Mailing ID, Mailing Name, Mailing Date, and Campaign ID. The table contains several rows of mailing records.

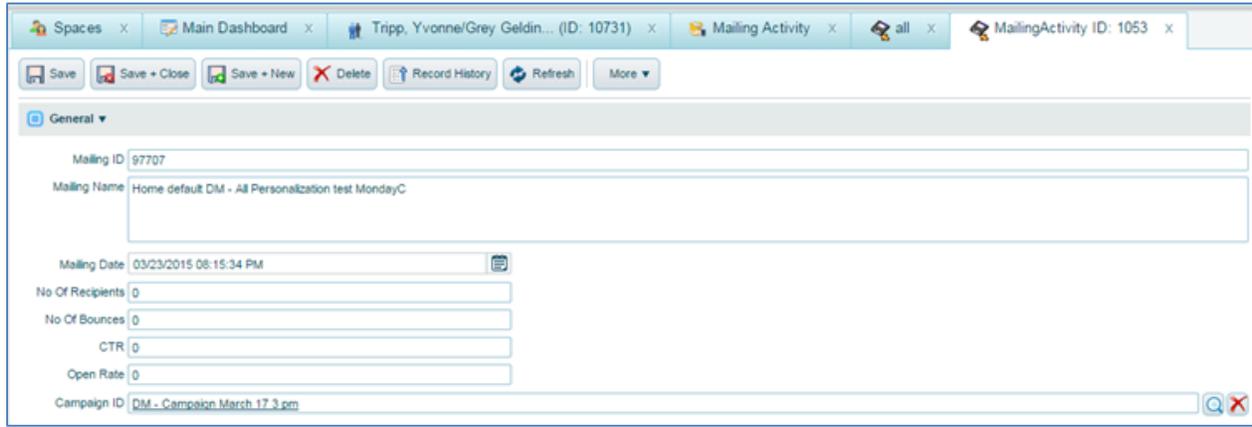
<input type="checkbox"/>	Mailing ID	Mailing Name	Mailing Date ▲	Campaign ID
<input type="checkbox"/>	97931	DM - Test mailing writebacks	03/30/2015 08:19:43 PM	5
<input type="checkbox"/>	97932	Copy of DM - Test mailing writebacks	03/30/2015 10:47:02 PM	5
<input type="checkbox"/>	97936	DM - test mailing activity wb	03/31/2015 07:54:03 PM	5
<input type="checkbox"/>	97937	Copy of DM - test mailing activity wb	03/31/2015 08:03:47 PM	5
<input type="checkbox"/>	97937	Copy of DM - test mailing activity wb	03/31/2015 08:03:47 PM	5
<input type="checkbox"/>	97937	Copy of DM - test mailing activity wb	03/31/2015 08:03:47 PM	5
<input type="checkbox"/>	97938	DM - test mailing sent	03/31/2015 08:40:42 PM	5

Mailing Level Information

Each time a mailing is sent from Informz, the “meta data” around that mailing is made available to Aptify. The fields that are provided to Aptify are:

- MailingID
- MailingName
- MailingDate
- CampaignID (which is the same as the target group name in Informz)

The image below shows how the mailing level information appears in the Mailing Activity area of Aptify.



It should be noted that due to the 50 character limit in Aptify, mailing names over 50 characters will be truncated in Aptify.

Subscriber Level Information

The subscriber level information will indicate if a particular Aptify person record has been sent a mailing and then if they have opened the mailing. For viewing ease, the mailing name and mailing sent date is provided as well. This provides important insights to an Aptify user as to what mailings have been sent and received to a particular person.

Member ID	Mailing ID	Sent	Opened	Clicked	Bounced	Bounce Type	Mailing Name	Mailing Sent Date
2539	97707	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Home default DM - All Personalization test MondayC	2015-03-23T20:15:34.000Z
2540	97707	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Home default DM - All Personalization test MondayC	2015-03-23T20:15:34.000Z
43997	97707	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Home default DM - All Personalization test MondayC	2015-03-23T20:15:34.000Z
43996	97707	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Home default DM - All Personalization test MondayC	2015-03-23T20:15:34.000Z
42996	97707	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Home default DM - All Personalization test MondayC	2015-03-23T20:15:34.000Z

Although not a selection on the bridge configuration page, clicked and bounced mailing activity writebacks are automatically included.

ADMINISTRATION

The following can be done from the **Bridge Configuration** (*Admin > Setup > Bridge Configuration*) page.

Bridge Configuration

Bridge configuration allows an administrator to modify and delete attributes used to connect data from a remote database to Informz. These attributes are used for filtering subscribers and personalizing emails.

Attributes

[List of Attributes \(also leads to edit\)](#)

Target Group Types

[Refresh Target Group List](#)

Diagnostics

[Check Connection](#)

[Writeback List](#)

 **Writeback Settings**

 Subscriber Activity per Mailing

Enable Mailing Activity Writeback

Sent Opened

 Writeback Frequency

Hourly Daily Weekly Manual Only

* Mailing Name and Date/Time will be written back with the mailing activity data.

[Save](#)

LIST OF ATTRIBUTES

Clicking on the *List of Attributes (also leads to edit)* link displays the fields from Aptify that can be used for Personalization.

The *Internal Name*, *Comment*, *Display Name*, and *Personalization Default* can all be edited by the client.

The *Personalization Default* is used whenever there is no value for the Customer when the personalization field is used in a mailing.

The *Data Element* is the Aptify name of the field, so it cannot be changed in Informz.

If the client does not wish to use a particular piece of data from Aptify for personalization, they uncheck the **Attribute Use** “**Personalization**” checkbox.

The screenshot shows a web form titled "Attribute" with a "Configuration Home" link at the top left. The form contains the following fields:

- Attribute Use:** A checkbox labeled "Personalization" which is checked.
- Internal Name:** A text input field containing "First Name".
- Comment:** An empty text input field.
- Data Element:** A text input field containing "FirstName".
- Is Valid:** A checkbox which is checked.
- Display Name:** A text input field containing "First Name".
- Personalization Default:** An empty text input field.

A "Submit" button is located at the bottom of the form.

PREFERENCE MANAGEMENT

A subscriber’s (Customer’s) preferences are managed using standard Aptify functionality. The subscriber is required to log in to Aptify to manage their preferences.

BOUNCE MANAGEMENT

Informz automatically unsubscribes a subscriber if certain deliverability issues exist. Data from the past 90 days of mailing activity is used to make this determination. Listed below are the steps in evaluating if an email address will be automatically unsubscribed:

- An aol.com email address becomes a repeat bouncer and unsubscribed after 1 hard bounce. There is no special logic for aol.com soft bounces. Those addresses follow normal soft-bounce logic.
- After 3 consecutive hard bounces, the delivery format is switched to Text format.
- After 4 consecutive hard bounces, the email address becomes a repeat bouncer and unsubscribed.
- After 6 consecutive soft or hard bounces (any combination that does not include 4 hard bounces in a row), delivery format is switched to Text format.
- After 7 consecutive soft or hard bounces (any combination that does not include 4 hard bounces in a row), the email address becomes a repeat bouncer and unsubscribed.

Blocked emails are ignored in this process.

DIAGNOSTICS

The **Check Connection** link ensures that Informz can connect with Aptify. Any issues with this page require support from the Informz Software Operations team, which your eMarketing Advisor can facilitate.

Check Connection		
Action Performed	Result	Time To Process
Access the Web Server:	✔ Connected	00:00:01
Send Status Message:	✔ Successful	00:00:01

Re-Run Test

The **Writeback List** displays any unsubscribe, resubscribe, or mailing activity writeback messages from Informz. This is particularly useful to evaluate writeback errors.

[Configuration Home](#)

Writeback Message Queue				Show Supported Max records 100		
ID	Type	Status	Description	Created	Sent	Control
591164	Resubscribe	Error	Resubscribe request for yyy@aol.com	10/14/2014 1:59:44 PM	10/14/2014 2:03:15 PM	Retrv
591163	Unsubscribe	Do Not Send	Unsubscribe Request: yyy@aol.com Reason: test (by: admin admin)	10/14/2014 1:47:06 PM	10/14/2014 1:48:14 PM	
591162	Resubscribe	Error	Resubscribe request for zzeblouski@gmail.com	10/14/2014 1:46:54 PM	10/14/2014 1:48:14 PM	Retrv
591089	Unsubscribe	Error	Unsubscribe Request: mmankina@gmail.com Reason: Please unsubscribe me, I'm bad!!!! (mme) (by: Anthony Generalov)	10/13/2014 10:36:16 AM	10/13/2014 10:48:18 AM	Retrv

ONGOING SUPPORT

If you have any questions about the integration, please contact your eMarketing Advisor for support and guidance. If you have Aptify specific questions, please send an email to support@aptify.com.

We look forward to your success using the Informz for Aptify integration.