Marketing Automation Enterprise Personify Installation Guide

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About the Real Magnet Personify Integration

This document provides an overview of the Marketing Automation Enterprise (formerly known as Real Magnet) Personify integration installation process. It will cover the steps required to ensure a successful installation. The term Real Magnet is synonymous with Marketing Automation Enterprise used throughout this installation guide and installation files.

The Marketing Automation Enterprise Personify integration utilizes Marketing Automation Enterprise's Universal Webservices. It is compatible across all browsers[1], and can be utilized in conjunction with the Marketing Automation Enterprise platform. The integration is compatible with Personify Enterprise versions 7.3 or higher.

This documentation will cover:

- Installation Requirements
- Starting the Installation
- Installing the Universal Webservice
- Finishing the Installation
- Verifying the Installation
- Notes and Additional Considerations

Notification

In general, Marketing Automation Enterprise should be notified should there be any change to the service or servers, this notification of any scheduled changes should be made to realmagnetsupport@higherlogic.com

Installation Requirements

The Marketing Automation Enterprise Personify integration requires:

- Personify 7.3 or higher
- Completion of the Implementation Documentation
- A valid SSL certificate
- A webserver with .NET 4.0 framework installed

Additional Files

- Stored Procedures
- Universal Webservices Installer
- Encryption Tool (if provisioning multiple Marketing Automation Enterprise accounts)

[1] Please refer to Notes and Additional Considerations for compatibility across Internet Explorer

Starting the Installation

Timeline: 4 -5 business days

The steps of the installation process are below and are completed in Higher Logic production accounts.

These steps are:

1. Configuring the Real Magnet Integration with Personify
2. Configuring the Marketing Automation Enterprise Account
3. Configuring Tracking in the Marketing Automation Enterprise Account

Note: If you are hosted Personify will complete the Installation. If you are premise-based then you are responsible for the installation.

Installing the Universal Webservice

Timeline: 30 minutes – 1 hour

To complete the integration provisioning process the installation steps below must be completed. These are the steps that will be completed. A detailed definition of what is being installed is available in Appendix A.

Before the Installation

Ensure the following:

- The Database is accessible from the machine that the Universal Web Service is going to be installed
- The port that is going to be used for the installation is not being used by another service
- The server has .NET 4.0 installed

RESTRICT ACCESS TO THE WEBSITE FROM ONLY KNOWN IP ADDRESSES

We recommend that you setup your firewall rules to only allow access to the Webserver from the Marketing Automation Enterprise and Local IP addresses and any internal IP addresses that are necessary for testing. This will prevent unauthorized access.

- Allow port access to the following Marketing Automation Enterprise IP addresses:

Production:

a. 209.18.70.108

b. 209.18.70.207

c. 209.18.70.208

d. 209.18.121.194

Ports:

80 HTTP

443 HTTPS

Updating the Organization Key

Before running the SQL code provided, replace the OrgID (Organization ID) and OrgUnitID (Organization Unit ID) with your own Organization ID and Unit ID.

The Organization ID and Unit can be identified by logging in to Personify, and clicking in the bottom right of the screen, the third item from the right will list your OrgID and Unit.

```
declare @OrgID varchar (50) = ‘INSERT ORG ID’

declare @OrgUnitID varchar (50) = ‘INSERT ORG ID’
```

Running the Stored Procedures

Run the stored procedures after the changes.

SQLQuery1.sql ...gnetmail (73))*

```
)
as
select 'Customer' as ID, 'Customer' as Name
GO

CREATE PROCEDURE [dbo].[RealMagnet_UpdateInterestAreaSubscription]
(
@TrackingActivityID bigint,
@ActivityCode varchar(20),
@ActivitySubCode varchar(50),
@CustomMemberID varchar(50),
@DateStampUTC datetime,
@InterestAreaID varchar(50)
)
AS

declare @OrgID varchar(50) = 'NSSWP'
declare @OrgUnitID varchar(50) = 'NSSWP'
declare @SubSystem varchar(10) = 'CUS'
declare @DateStampLocal datetime = convert(datetime,convert(datetimeoffset,convert(nvarchar(25),@DateStampUTC,127)))
declare @OptedInFlag YES_NO

if @ActivityCode = 'Subscribed'
begin
set @OptedInFlag = 'Y'
end
else
begin
set @OptedInFlag = 'N'
end

update
```

You should receive a successful run statement as a result. Check the stored procedures that were created in your database under Programmability. Successful installation will display eight stored procedures:

- dbo.RealMagnet_GetEntities
- dbo.RealMagnet_GetFields
- dbo.RealMagnet_GetInterestAreas
- dbo.RealMagnet_GetQueries
- dbo.RealMagnet_GetQueryData
- dbo.RealMagnet_InsertTrackingActivity
- dbo.RealMagnet_UpdateInterestAreaSubscription

Run Activity Script
Ensure that you run the activity script below:

1. Login as System Administrator Persona in Personify
2. Select **System Admin**
3. Select **System Codes**
4. Select **System Types and Codes**
5. Select **Subsystem: Customer Subsystem**
6. Search for Activity
7. Select **Add Code**
    a. Code: RealMagnet
    b. Description: Real Magnet Integration

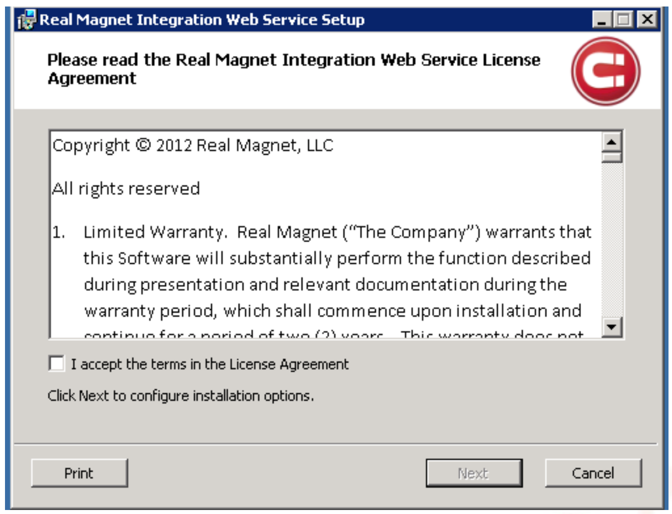
```
INSERT APP_CODE(TYPE, DESCR, SYSTEM_FLAG, DISPLAY_ORDER, ACTIVE_FLAG,
STATUS_CHANGE_DATE,AUTO_POPULATE_FLAG, AVAILABLE_TO_WEB_FLAG,
SUBCODE_OPTION_1_REQD_FLAG,SUBCODE_OPTION_2_REQD_FLAG, SUBCODE_OPTION_3_REQD_FLAG, ADDOPER,
CONCURRENCY_ID, CODE,SUBSYSTEM)



VALUES ('ACTIVITY', 'Real Magnet', 'N', 0, 'Y', getdate(), 'Y', 'N', 'N', 'N', 'N', 'ADMIN', 0, 'REALMAGNET', 'CUS')
```

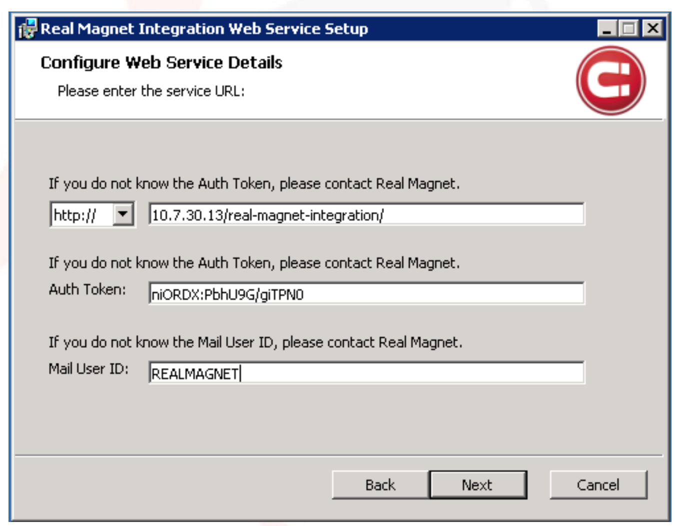
Download the installation

- Download the installer from https://support.higherlogic.com/hc/en-us/article_attachments/360054100571/RemoteWebServiceHostV2.zip
    - Extract the installer executable to C:\Program Files (x86)\Real Magnet\Integration Web Service
    - Launch the .exe as an administrative user
- Double click on the Installer and follow the instructions
- Accept the License Agreement

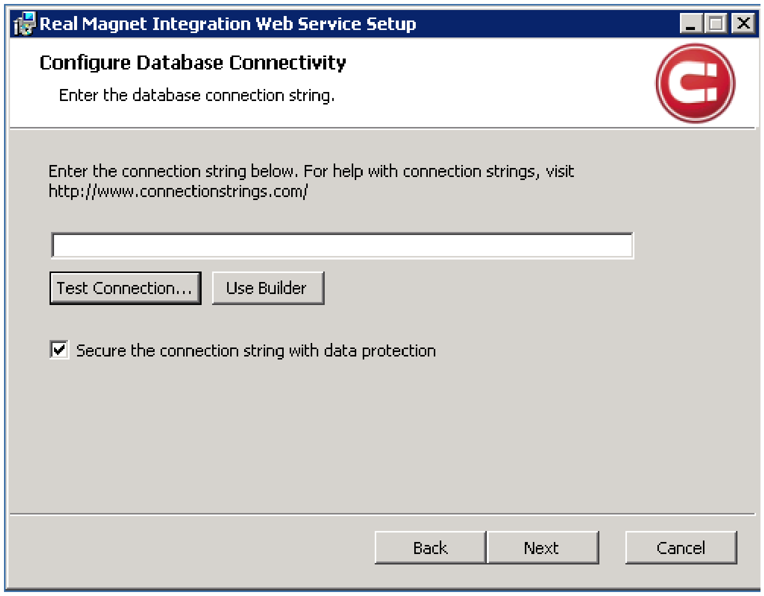


Select the location that you would like to install the Universal Web Service. On the next page, you will need to insert the installation keys. These keys will include:

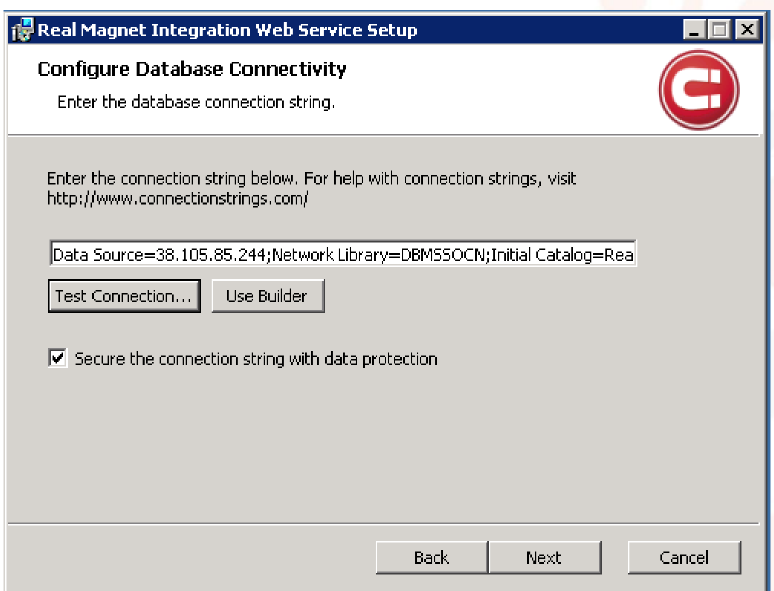
- The IP Address/ URL that you would like to use to run the service
- Authentication Token: Provided by Higher Logic
- Mail User ID: Provided by Higher Logic



On the next page, use builder to build the SQL connection between your database and the Universal Web Service.

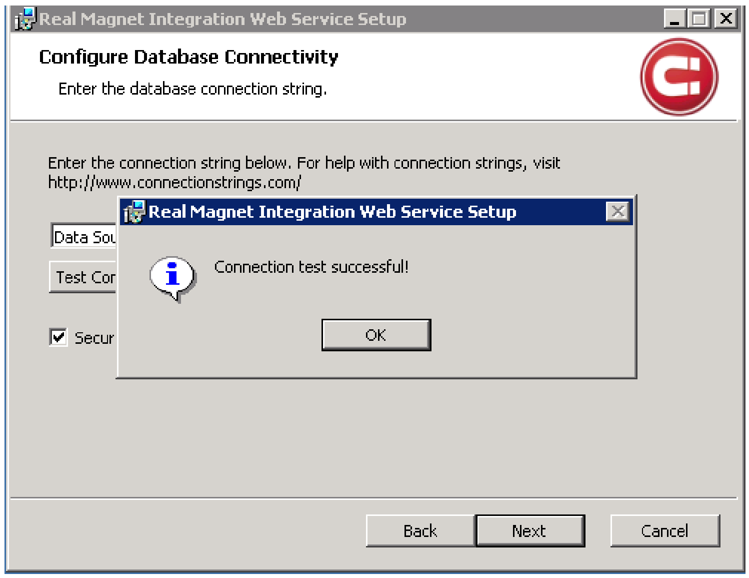


The screen should be similar to the following after you use the builder tool.



Verify the Database Connectivity:

Click on Test Connection to test the connection

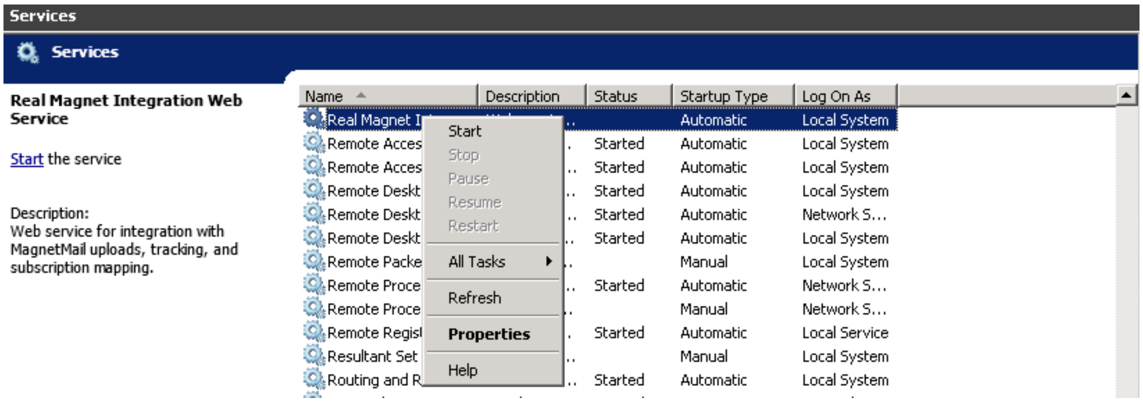


After the successful prompt:

- Select **OK**
- Select **Next**
- Select **Install**

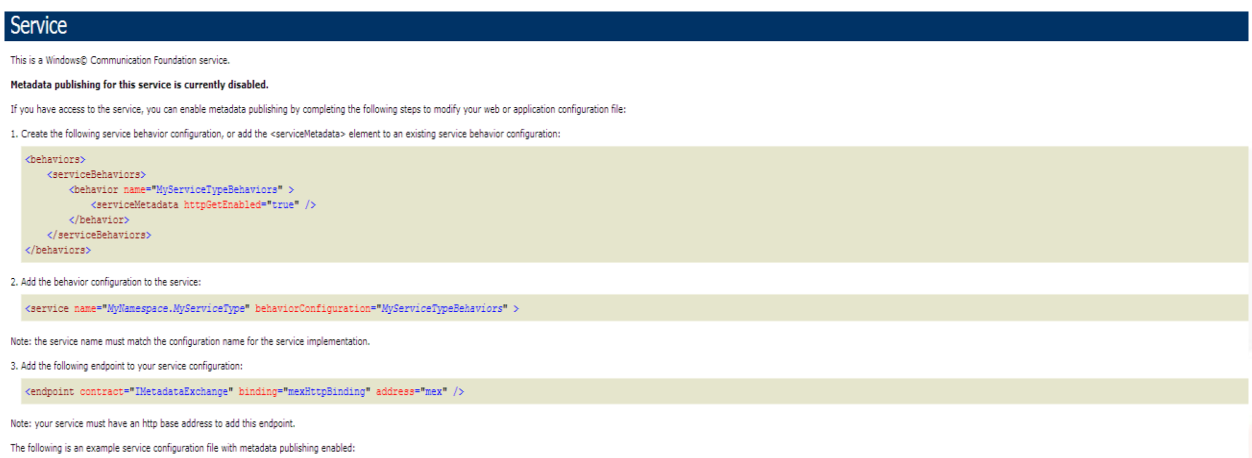
Start the Real Magnet Service:

- Go to Services (You can go to run and type services.msc or Go to Server Manager and click on Services)
- Right click on the Real Magnet Service
- Select **Start**



Verify the service is running:
After you start the service, check the service via the URL that was use during the installation. In this example that would be http://10.7.30.13/real-magnet-integration/.

After loading the URL you should be prompted the following screen



Additional Configuration Settings
Depending on your hosting environment there may need to be additional configuration settings.

Load balanced servers
If your installation environment utilizes a load balanced approach, during installation you will need to walk through the steps outlined below.

1. Installation of the Real Magnet Webservices must be completed on all servers independently.

OR

2. The installation of the Real Magnet Webservices is completed on one server, and the configuration file is:
    1. Decrypted
    2. Copied onto the other servers
    3. Re-encrypted for each server

If you would like to undergo route 2 – please let the Real Magnet integrations team know and they can provide you with the instructions for encryption.

Once the above has been completed:

1. Halt the Real Magnet service
2. Navigate to C:\Program Files (x86)\Real Magnet\Integration Web Service\bin
3. Open up RealMagnet.Integrations.RemoteWebService.StandaloneHost.exe.config file with a text editor
4. Set hostNameComparisonMode="StrongWildcard"
5. Restart the Real Magnet service

Installing the SSL certificate
This integration requires an SSL certificate; this certificate should be validated, in order for Real Magnet to run its webservice.

When you have successfully installed the installation of the certificate make sure that you also update any other server side settings you may have already, e.g. IIS.

SSL Certificate
If you are using a properly installed SSL certificate, you will want to update the configuration file's security.

1. Halt the Real Magnet service
2. Navigate to C:\Program Files (x86)\Real Magnet\Integration Web Service\bin
3. Open up RealMagnet.Integrations.RemoteWebService.StandaloneHost.exe.config file with a text editor
4. Set security mode="Transport"
5. Restart the Real Magnet service

If installing for multiple Real Magnet accounts, follow the steps provided in the supplemental attachment on encryption.

Finishing the Installation

Configuring the Real Magnet Account
Timeline: 1 business day

Once the integration is complete, in order to provision your Real Magnet account to test you must provide the following to the Marketing Automation Enterprise Integrations team:

- Authentication Token
- URL used during the installation

Once the Real Magnet component is installed in Personify and Real Magnet has been notified, Real Magnet will provision the designated account with the supplied credentials.

Verifying Installation

Timeline: 1 - 2 business days

In order to verify the installation Marketing Automation Enterprise completes end-to-end testing that includes:

- Uploading individual queries from Personify into Marketing Automation Enterprise groups
- Visual confirmation of Marketing Automation Enterprise tracking data in Personify
- Confirmation that the Marketing Automation Enterprise subscription and unsubscribe data is being returned to Personify

Additional verification of the installation is completed via client end-to-end testing that is expanded below.

End-User Testing
Timeline: 5 - 7 business days

End-User testing verifies a user's interaction with the integration platform. Marketing Automation Enterprise will want to ensure that the User Interface (UI) provides the user with the appropriate access and navigation through the functions of the integration. In addition, End-User testing ensures that the objects within the UI function as expected and conform to Marketing Automation Enterprise standards.

Test Objective	Verify the following:
	• Navigation through the integration application properly reflects integration requirements • Identify possible performance issues: anything that may prevent either platform from performing optimally resulting in usability issues
Technique	Complete each action under Step (Description)
Expected Result	Each action has been successfully completed to remain consistent

Special Considerations	If testing completed in Internet Explorer please refer to the Notes and Additional Considerations section

An advanced test plan can be found in Appendix B.

Confirm the Integration is successfully configured in Personify and Marketing Automation Enterprise

1. Login to Marketing Automation Enterprise
2. Select **Tools**
3. Select **Personify Management**
4. Select **Create Upload Job**
    a. Verify that available Marketing Lists can be viewed
5. Select a Marketing List
6. Select **Create Map**
    a. Select the column **Primaryemailaddress** under Personify Field
    b. Select **Email** under Real Magnet Field
    c. Select **Create Schedule**
7. Create a New Group
    a. Select **On Demand**
    b. Select **Submit**
    c. On the overview page select the **green play button**

The Marketing List will upload to Marketing Automation Enterprise.

Verify that tracking reports back to the test records

1. Login to Marketing Automation Enterprise
2. Select **Tools**
3. Select **Personify Management**
4. Select **Manage Tracking**
    a. Verify that tracking items are selected
    b. Select **Submit**
5. Send a message to the test group
6. The next day login to Personify
7. Find a customer from the test marketing list
    a. The activity should update to the customer's Recent Activities child form

Finishing the Installation

Once testing has been completed – Marketing Automation Enterprise will provision the Marketing Automation Enterprise production account.

These steps are highlighted above:

- Configuring the Marketing Automation Enterprise Integration with Personify
- Configuring the Marketing Automation Enterprise Account
- Configuring Tracking in the Marketing Automation Enterprise Account

Updating tracking information in the production Personify account

- Existing recipient History Synchronization

Existing Recipient History Synchronization

Timeline: 4 -5 business days

If recipient data from Personify has been uploaded into Marketing Automation Enterprise account prior to the integration, an additional synchronization step needs to be performed to properly link Marketing Automation Enterprise recipients to Personify member records.

- Export member records for recipients that exist in Marketing Automation Enterprise from Personify. If it is not clear which records already exist in Marketing Automation Enterprise, simply create a marketing list that exports all customers.

  Marketing Automation Enterprise only requires the following fields included in the export:
  - Master Customer ID
  - Email Address

- Once the data has been exported it must be provided to Real Magnet via email or uploaded to Real Magnet's secure FTP (credentials will be provided during the installation process).

- Once Real Magnet updates recipient records in Real Magnet up to 14 days' worth of tracking data will be updated in the Personify CUS_ACTIVITY table.

Notes and Additional Considerations

Browser Considerations

Due to Internet Explorer's security settings exceptions should be made for Marketing Automation Enterprise:

- Add https://magnetmail.net to trusted sites
- Add https://magnetmail.net to a list of sites under Compatibility View Settings

Character Limitations

The maximum characters allowed per field are:

Fields	Characters
E-mail, Address 1, Address 2, All Custom Fields	100 Characters
First name, Last Name, Phone, Fax, City, State, Zip	50 Characters
Company	200 Characters
Enhanced Personalization Field	250 Characters

Technical Support

Direct all technical questions to realmagnetsupport@higherlogic.com.

Appendix

A. Definition of the Universal Webservices

Marketing Automation Enterprise provides a simple and straightforward solution for integration with various 3rd party solutions. Customers are given a simple and easy to install web service that connects to their database and performs functions necessary to facilitate upload of recipient data as well as download of the tracking information.

Methods

Real Magnet Integration Web Service implements following methods.

GetEntities

Parameters: Real Magnet Account ID, Real Magnet Login ID

Method returns the list of entity names from the target system. Entity name can be such thing as a “Customer” or “Member”.

Entities define to scope for queries.

GetQueries

Parameters: Real Magnet Account ID, Real Magnet Login ID, Entity ID

Method returns a list of metadata about the queries available for the specified entity; this metadata includes the query name, ID and kind.

GetFields

Parameters: Real Magnet Account ID, Real Magnet Login ID, Entity ID, Query ID, Query Kind

Method returns a list of fields that a specific query contains. The list contains two strings: field friendly name (e.g. ‘First Name’) as well as a database field name (e.g. ‘cust_first_name’)

GetQueryData

Parameters: Real Magnet Account ID, Real Magnet Login ID, Entity ID, Query ID, Query Kind

Method executes given query and streams the result set that the query produced. Marketing Automation Enterprise relies on the 3rd party system to dictate implementation of this method. Note, that this method will only execute underlying stored procedure once and then auto-paginate the result set. This allows for efficient streaming of very large result sets.

GetInterestAreas

Parameters: Real Magnet Account ID, Real Magnet Login ID

Method returns a list of e-mail opt-in/opt-out groups for subscription management.

InsertTrackingActivity
Parameters: Tracking record

Method inserts unified tracking records into the database. This is the layout of the tracking record:

Field Name	Data Type	Description
ActivityCode	string(50)	Activity code (SUBSCRIBE, CLICK, OPEN, DELIVERED, etc.)
ActivitySubcode	string(50)	Subactivity code (USER_NOT_FOUND for BOUNCED, for instance)
CustomMemberId	string(50)	Record ID in the target database
EmailAddress	string(100)	Email address of the recipient
RecipientId	int64	Real Magnet Recipient ID
DateStampUTC	DateTime	Date of the record in UTC format
UnsubscribeCategory	string(50)	Group Magnet Unsubscribe Category
GroupName	string(50)	Real Magnet Group
MessageName	string(50)	Real Magnet Message
MessageCategory	string(100)	Real Magnet Message Category
LinkUrl	string(1500)	URL for the link clicked
LinkLabel	string(50)	Link Label
InterestAreas	List of strings	Interest Areas associated with the record

Stored Procedures

Real Magnet Integration Web Service implements following stored procedures:

RealMagnet_GetEntities

Description: Returns list of entities for integrations where list can be generated with multiple entities; otherwise returns name of the subsystem such as “customers” or “persons”.

Parameters

Name	Datatype	Description
@LoginName	varchar(100) NOT NULL	The Real Magnet login of the person making this request.

Result Set Columns

Name	Datatype	Description
ID	varchar(100) NOT NULL	The ID of the Entity type
Name	varchar(100)	The name of the Entity type

RealMagnet_GetQueries

Description: Returns queries associated with an entity

Parameters

Name	Datatype	Description
@LoginName	varchar(100) NOT NULL	The Real Magnet login of the person making this request.
@EntityID	varchar(100)	The ID of the Entity type

Result Set Columns

Name	Datatype	Description
ID	varchar(100) NOT NULL	The ID of the query
Name	varchar(100)	The user-friendly name or description of the query
KindID	varchar(100)	The ID of the kind of query
KindName	varchar(100)	The user-friendly name of the kind of query
OwnerID	varchar(100)	The query owner’s ID

OwnerName	varchar(100)	The query owner's name

RealMagnet_GetFields

Description: Returns the fields of a recipient/contact that can be uploaded to Real Magnet

Parameters

Name	Datatype	Description
@LoginName	varchar(100) NOT NULL	The Real Magnet login of the person making this request.
@EntityID	varchar(100) NOT NULL	The ID of the Entity type
@QueryID	varchar(100) NOT NULL	The ID of the query
@QueryKind	varchar(100) NOT NULL	The ID of the kind of query

Result Set Columns

Name	Datatype	Description
ID	varchar(100) NOT NULL	The column name as it will appear in the result set of RealMagnet_GetQueryData
Name	varchar(100)	The user-friendly name or description of this field

RealMagnet_GetQueryData

Description: Returns the contact data that will be uploaded to Real Magnet

Parameters

Name	Datatype	Description
@LoginName	varchar(100) NOT NULL	The Real Magnet login of the person making this request.
@EntityID	varchar(100) NOT NULL	The ID of the Entity type
@QueryID	varchar(100) NOT NULL	The ID of the query

@QueryKind	varchar(100) NOT NULL	The ID of the kind of query

Result Set Columns

The shape of the result set may vary; however, for each ID present in the result set of RealMagnet_GetFields there must be at least one so named column in the result set of RealMagnet_GetQueryData. Duplicate column names are allowed; however, only the first column of a given name will be used.

RealMagnet_GetInterestAreas

Description: Returns the list of interest areas, topic codes, or opt-ins for subscription management.

Parameters

None

Result Set Columns

Name	Datatype	Description
ID	varchar(100) NOT NULL	The ID of the interest area, which will be passed back to RealMagnet_UpdateInterestAreaSubscriptions
Name	varchar(100)	The user-friendly name of the interest area

RealMagnet_InsertTrackingActivity

Description: Records tracking activity that is sent from Real Magnet. This will often include integration specific steps.

Parameters

Name	Datatype	Description
@TrackingActivityId	bigint NOT NULL	Magnet Mail ID of this activity
@ActivityCode	varchar(20) NOT NULL	Activity code (SUBSCRIBED, CLICK, OPEN, DELIVERED, etc.)
@ActivitySubCode	varchar(50)	Subactivity code (USER_NOT_FOUND for BOUNCED, for instance)
@CustomMemberId	varchar(50) NOT NULL	Record ID in the target database
@EmailAddress	varchar(100)	Recipient's email address
@RecipientId	bigint NOT NULL	Magnet Mail Recipient ID
@DateStampUTC	datetime NOT NULL	Data and time of the activity in UTC
@UnsubscribeCategory	varchar(50)	Magnet Mail Category for Unsubscribe
@GroupName	varchar(50)	Magnet Mail Group
@MessageName	varchar(50)	Magnet Mail Message

@LinkUrl	varchar(1500)	URL for link clicks
@LinkLabel	varchar(50)	Label for link clicks
@MessageCategory	varchar(50)	Magnet Mail Message Category

Result Set Columns

This query returns no results.

RealMagnet_UpdateInterestAreaSubscriptions

Description: Updates a contact's opt-in or opt-out option for an interest area. Interest area may also be known as another name depending on the CRM, for example topic code.

Parameters

Name	Datatype	Description
@TrackingActivityId	bigint NOT NULL	Magnet Mail ID of this activity
@ActivityCode	varchar(20) NOT NULL	Subscribed or Unsubscribed
@ActivitySubCode	varchar(50)	Subactivity code
@CustomMemberId	varchar(50) NOT NULL	Record ID in the target database
@DateStampUTC	datetime NOT NULL	Data and time of the activity in UTC
@InterestArea	varchar(100) NOT NULL	The ID of the interest area to opt-in or opt-out of

Result Set Columns

This query returns no results.

RealMagnet_InsertProspect

Description: Finds a contact with a matching email address, or creates a new contact with the specified contact information. If a matching contact is found, the existing contact is not updated. This procedure is responsible for mapping from Real Magnet recipient fields to tables and columns in the CRM database when creating a new contact.

Parameters

Name	Datatype	Description
@RecipientId	bigint NOT NULL	Magnet Mail Recipient ID
@Properties	Name Value Pair TVP	Contact information; see below

RealMagnet_NameValuePair Columns

Name	Datatype	Description
Name	nvarchar(50)	Recipient field name
Value	nvarchar(200)	Recipient field value

Result Set Columns

Name	Datatype	Description
RecipientID	bigint NOT NULL	Echoes @RecipientID parameter
CustomMemberID	nvarchar(50)	ID of the found or created contact
Message	nvarchar(200)	Error message; null if and only if CustomMemberID is not null

B. Advanced Test Plan

Real Magnet Interface Testing

Test Case	Marketing Automation Enterprise Interface	
Description	This test case simulates one of the actions a Marketing Automation Enterprise user would perform in the Marketing Automation Enterprise platform to retrieve a list from Personify.	
Data Requirement:	Username – User must have permission and access rights to use the Marketing Automation Enterprise Scheduler. Username must be unique – Marketing Automation Enterprise does not allow for simultaneous logins. Password – Must be valid for given Username	
ID	**Step (Description)**	**Expected Result**
Real Magnet Scheduler		
RM01	Login to Real Magnet	The application should open to the Home screen.
RM02	Select Tools	The Account Management Page should load.
RM03	Select Personify Management	The Real Magnet Scheduler should load
Create Upload Job		
RM04	Select "Create Upload Job"	The create upload job page should load with a selection for either a customer or view marketing list from Personify
RM05	Select Submit	A grid should load listing all of your marketing lists available
RM06	Select Create Map	The create map page should load with Master Customer ID and Custom Member ID in red
RM07	Select Save Map checkbox	A text box should load, enter a name for the saved map
RM08	Select View Entire Field List	All of the column headers from your Individual Personify marketing list should load
RM09	Select One by One	The column header dropdowns should collapse

RM10	Select the column PrimaryEmailAddress under **Personify Field**	A dropdown box under **Real Magnet Field** should become clickable
RM11	Select Email under **Real Magnet Field**	A red circle with an X should appear to the right
RM12	Select Create Schedule	The Create Schedule page should appear
RM13	Select Create New Group	A pop-up box will generate with an empty text field
RM14	Enter the new group name select create	The pop-up box will close; the new group name should appear in the dropdown under **Select Group**. Add to Group will remain checked as a default
RM15	Select On Demand	Schedule and run now radial button should hide
RM16	Select Submit	The Upload Jobs page will appear
RM17	Select the green play button next to your newly created job	A popup page will present – asking for you to confirm your selection
RM18	Select OK	A popup page will present – informing you that your upload has been scheduled and will run shortly
RM19	Upload job completes	**Scheduled Time** column will display last run date, **Group Results** column will display the results of the upload
Manage Tracking		
RM20	Select Personify Management	The Real Magnet Scheduler should load
RM21	Select Manage Tracking	The Manage Tracking page should load with nothing selected
RM22	Select all of the tracking items	The checkboxes should fill
RM23	Select a time for the tracking to sync with Personify	The dropdowns should display times
RM24	Select submit	The Last Run should display *Not Run Yet*. The Last Status should read success. Last Updated By should read with your login.
Manage Unsubscribes		
RM25	Select Personify Management	The Real Magnet Scheduler should load
RM26	Select Manage Unsubscribes	The Manage Unsubscribes page should load with nothing selected
RM27	Select Group or Category	If you have Group Category enabled you should see two radial buttons
RM28	Select Group or Category	The radial will turn blue
RM29	Select a Group or Category from the dropdown	Your groups or categories should appear in the dropdown instead of Select a Group or Category
RM30	Select an Interest Area to map the Real Magnet Group to	The selected checkbox should fill with a blue check mark
RM31	Select Submit	The Group or Category name should appear under **Currently Mapped Unsubscribes By Group or Category** with the Interest Areas selected previously

Preference Management Pages		
This option is only applicable if you opted for a Marketing Automation Enterprise Preference Management Page, otherwise proceed to steps below.		
Data Requirement		1. Ensure that your Config Settings have been updated in your Personify server If they have not contact the integration Project Manager 2. Ensure that you have Interest Areas 3. Ensure that you have uploaded a Marketing list comprised of individuals opted in to Interest Areas
RM32	Select Personify Management	The Real Magnet Scheduler should load
RM33	Select Manage Unsubscribes	The Manage Unsubscribes page should load with nothing selected
RM34	Select Group or Category	If you have Group Category enabled you should see two radial buttons
RM35	Select Group or Category	The radial will turn blue
RM36	Select a Group or Category from the dropdown	Your groups or categories should appear in the dropdown instead of Select a Group or Category
RM37	Select an Interest Area to map the Real Magnet Group to	The selected checkbox should fill with a blue check mark
RM38	Map Interest Areas to the Groups or Categories associated with your preference page	The Group or Category name should appear under **Currently Mapped Unsubscribes By Group or Category** with the Interest Areas selected previously
RM39	Send a Message to the separate test groups (refer to **Send a Real Magnet Message to the Test Marketing List**)	This step may be completed multiple times – depending on how many settings and configurations that are being tested. If you are testing the send multiple times – you will view all of the tracking detail the next day
Send a Real Magnet Message to the Test Marketing List		
RM40	Select Messages	The Messages page should load
RM41	Create a new message	The Template Selection page should load
RM42	Select Blank template	The Edit Message page should show with the WYSIWYG editor
RM43	Create a Message – be sure to include a link and instructions for your recipients to click through the message and unsubscribe. Select Save.	The time stamp of the Save will appear
RM44	Select Edit Text	The Edit Text Version page should load with the text from the message pre-populated
RM45	Select Save	The time stamp of the Save will appear
RM45	Select Send Message to Groups	The Send page should load
RM46	Add From Line, Subject Line and Scheduled Send time and select the group to send to	The group will display beneath the green bar
RM47	Select submit	The Confirmation page should load with the send details

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		****If Group Category is your unsubscribe setting and you have a Preference Management Page ensure that your group has a category assigned****
RM48	Select Submit	The Sent Message confirmation page should load with a green thumbs up image and the message: The message was successfully sent to the queue and will be processed shortly
RM49	Once the message is received – select unsubscribe	The activity should write back to Real Magnet. And should write back to Personify interest areas **24 hours** later
RM50	View the message results the next day in Personify	The activity should update to the customer's Recent Activities child form
RM51	View the unsubscribe results the next day in Personify	The activity should update to the customer member record – you can view this information by going to the customer, selecting Participation and Maintain Opt-in/Opt-Out Preferences
RM52	Make a change to one (or multiple) of the first and last names of the Personify customer test records and upload the marketing list to a Real Magnet group (refer to **Create Upload Job**)	The data should overwrite in the Real Magnet account

Personify Interface Testing

Test Case:	**Personify Interface**	
Description:	This test case simulates one of the actions a Real magnet user would perform in the Personify platform to verify tracking data, upload a list to Real Magnet, and access the Real Magnet platform within Personify.	
Data Requirements:	User Id – User must have permission and access rights to use Personify Password – Must be valid for given Username	
ID	**Step (Description)**	**Expected Result**
Checking Tracking Data for an Member Record		
PS01	Login to Personify	The application should open to the Overview screen.
PS02	Find customer from the test marketing list	The member record page should load
PS03	Select Recent Activities	The Recent Activities tab should have Real Magnet tracking activity loaded
PS04	Select any activity to expand its detail	You will be redirected to the Customer Demographics page