Marketing Automation Enterprise Aptify Installation Guide

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About the Real Magnet Aptify Integration

This document provides an overview of the Real Magnet Aptify integration installation process. It will cover the steps required to ensure a successful installation.

The Real Magnet Aptify integration utilizes Real Magnet's Universal Webservices. It is compatible across all browsers[1], and can be utilized in conjunction with the Real Magnet platform. The integration is compatible with Aptify versions 4.5 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, Real Magnet should be notified should there be any change to the service or servers, this notification of any scheduled changes should be made to support.higherlogic.com.

Installation Requirements

The Real Magnet Aptify integration requires:

- Aptify versions: 4.5 or higher
- Completion of the Implementation Documentation
- A valid SSL certificate
- A webserver with .NET 4.0 framework installed

Additional Files

- Aptify Entities Package. Real Magnet provides a standard Aptify package that contains:
    - Real Magnet Tracking Activity entities
- Universal Webservices Installer
- Stored Procedure
- Encryption Tool (if multiple Real Magnet accounts)

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

Starting the Installation

The steps of the installation process are highlighted below and can be completed in both the test and production accounts.

These steps are:

- Configuring the Real Magnet Integration with Aptify
- Configuring the Real Magnet Account
- Configuring Tracking in the Real Magnet Account

Note: If you are hosted Aptify will complete the Installation. If you host your Aptify then you are responsible for the installation.

Installing the Universal Webservice

Estimated time: 40 Minutes – 1 hour

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

Before 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 Real Magnet 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 Real Magnet IP addresses:
    - 209.18.70.108
    - 209.18.70.207
    - 209.18.70.208
    - 209.18.121.194
    - 209.18.70.19

Download the Integration Package

Download the integration package
(https://higherlogic.zendesk.com/hc/article_attachments/360054100491/aptifyv2.4.zip) to your computer and
unpack it into a folder of your choice (referred to as "installation folder" from here on).

Install Aptify Entities

1. Start Aptify and login as an admin user
2. Go to **Framework Application**
3. Select **Install Entities**
4. Leaving APTIFY selected on the first two screens, select **Entities** subfolder in the RM installation folder
5. Select **Next**
6. Make sure all entities are selected
7. Select **Next**
8. Uncheck **Upgrade Existing Entities** checkbox.
9. Select **Finish**

Note: The default configuration for entities only includes a basic set of permissions. Any additional permission will need to be granted for each entity after the installation is completed.

Configure the Persons Entity

The below steps will ensure that the tracking information for Real Magnet will display for an Aptify Person record.

1. Login as an admin user to Aptify
2. Select **Membership**
3. Select **Persons**
4. Select a view (if you do not have a Persons view refer to the section [Create a Persons View](#))
5. Double click to select and open a shared view folder
6. Double click to select and open a shared view
7. Double click a person record to open the form
8. Right click near the form tabs (Contact, Details…etc.)
9. Select Configure
   a. Select **Add Parts**
   b. Select **New Part**
   c. Select **View**
   d. Select **Next**
   e. For a view name enter "Real Magnet"

f. Select **Next**
g. Select the **SQL View** option
h. Select **Real Magnet Tracking Activity** entity
i. Enter the following string into the view window:

> select ID, ActivityDateTime, ActivityCode, EmailAddress, MessageName, LinkUrl from vwRealMagnetTrackingActivity
> where CustomMemberId = <%ID%>
> order by ActivityDateTime desc

10. Select **Next**
11. Select **Finish**
12. You will be redirected back to the **Select Part** pane, scroll down the right side of the dialog
13. Select **Real Magnet**
    a. Select **OK**
    b. Select **Yes**
    c. Select **OK**
14. The Real Magnet tab should now be visible within your person entity
15. Restart Aptify

Creating the RealMagnet Shared Folder

The Real Magnet universal web services expose all views contained within a shared folder, named "RealMagnet".

To add a Real Magnet shared folder:

1. Select **Home**
2. Select **Membership**
3. Right click on **Persons**
4. Select **Create Folder**
5. Enter the name "RealMagnet"
6. Check the box next to **Share this Folder**
7. Select **OK**

Users can then connect to the shared view so that they use and create views within the RealMagnet folder.

Please consult your Aptify documentation for more details on creating and managing shared folders.

Running the Stored Procedures

Run the stored procedures.

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_InsertProspect
☐ 🖹 dbo.RealMagnet_InsertTrackingActivity
☐ 🖹 dbo.RealMagnet_UpdateInterestAreaSubscription
```

Download the installation

- Download the installer from https://support.higherlogic.com/hc/en-us/article_attachments/360054100571/RemoteWebServiceHostV2.zip
- 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 to. 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 the service with
- Authentication Token
- Mail User ID
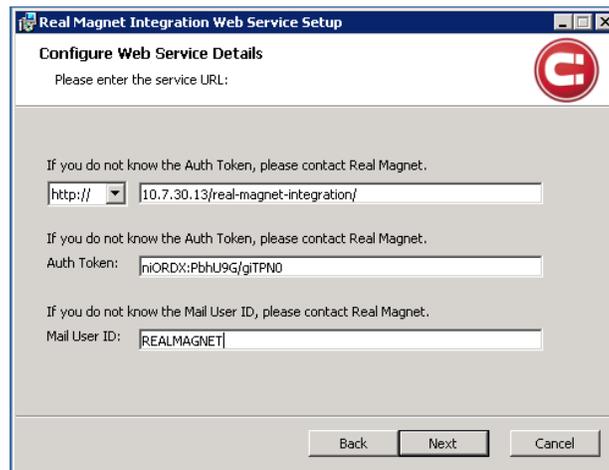
On the next page, use builder to build the SQL connection between your database and the Universal Web Service.
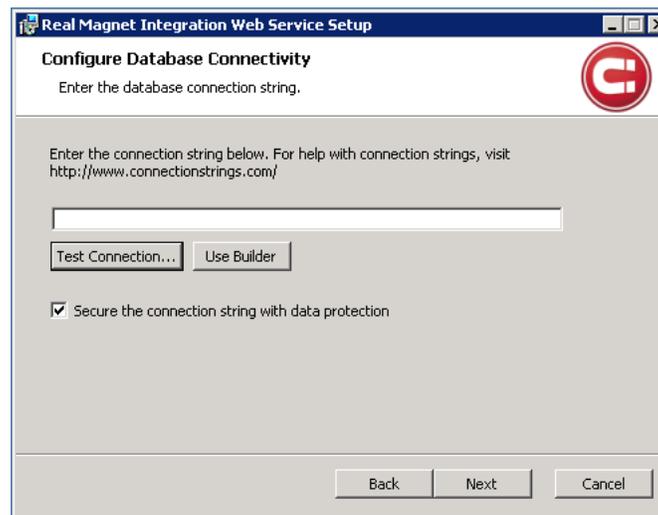
The screen should be similar to the following after you use the builder tool.
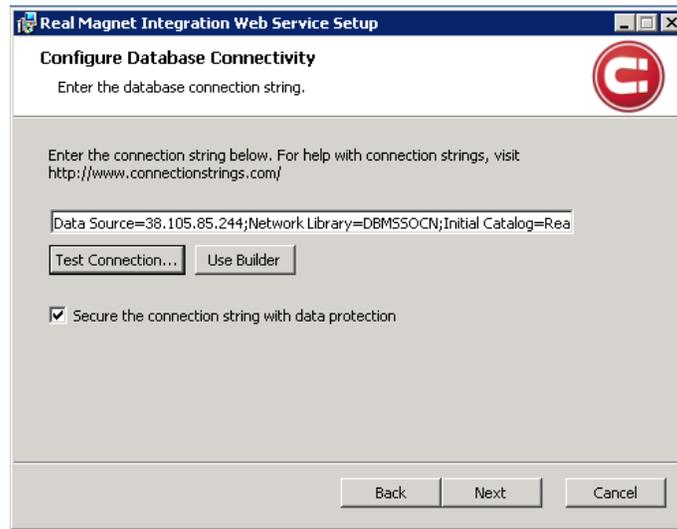
Verify the Database Connectivity

Click on Test Connection to test the connection
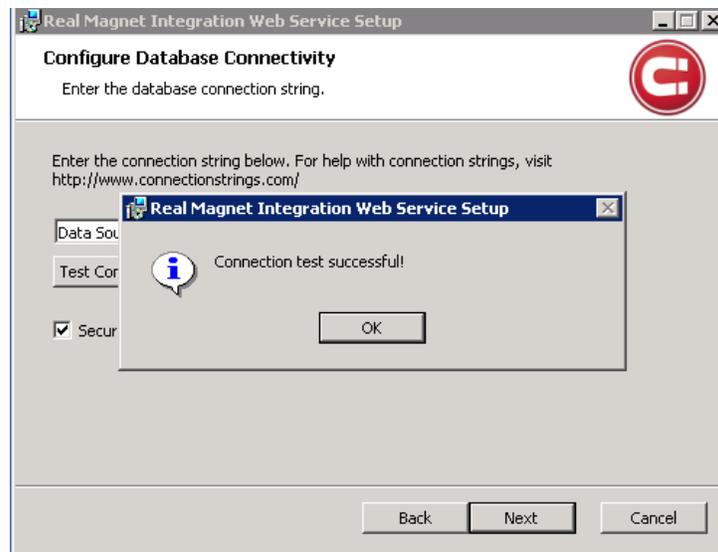
After the successful prompt:

- 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**
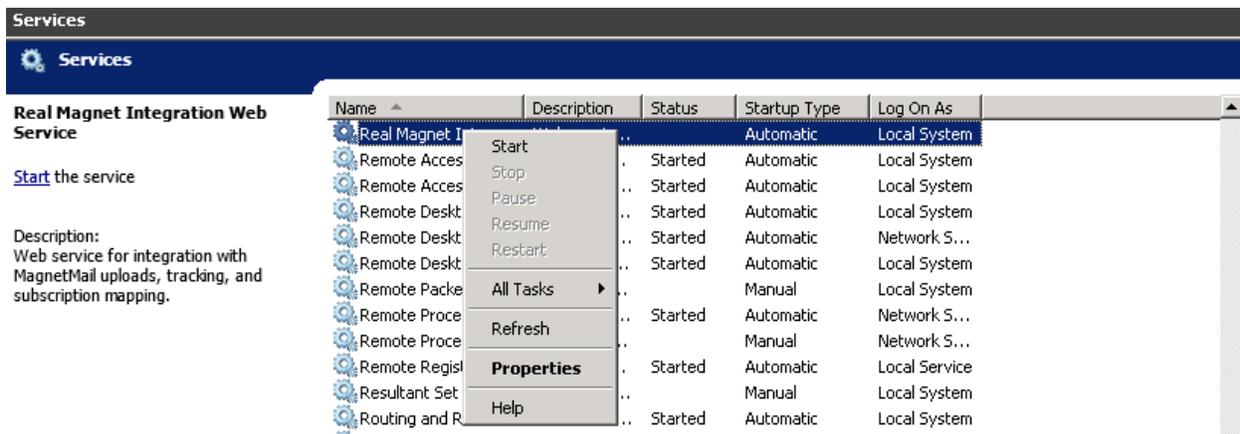
Verify the service is running

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

```
Service

This is a Windows© Communication Foundation service.

Metadata publishing for this service is currently disabled.

If you have access to the service, you can enable metadata publishing by completing the following steps to modify your web or application configuration file:

1. Create the following service behavior configuration, or add the <serviceMetadata> element to an existing service behavior configuration:

    <behaviors>
        <serviceBehaviors>
            <behavior name="MyServiceTypeBehaviors" >
                <serviceMetadata httpGetEnabled="true" />
            </behavior>
        </serviceBehaviors>
    </behaviors>

2. Add the behavior configuration to the service:

    <service name="MyNamespace.MyServiceType" behaviorConfiguration="MyServiceTypeBehaviors" >

Note: the service name must match the configuration name for the service implementation.

3. Add the following endpoint to your service configuration:

    <endpoint contract="IMetadataExchange" binding="mexHttpBinding" address="mex" />

Note: your service must have an http base address to add this endpoint.

The following is an example service configuration file with metadata publishing enabled:

    <configuration>
        <system.serviceModel>

            <services>
                <!-- Note: the service name must match the configuration name for the service implementation. -->
                <service name="MyNamespace.MyServiceType" behaviorConfiguration="MyServiceTypeBehaviors" >
                    <!-- Add the following endpoint. -->
                    <!-- Note: your service must have an http base address to add this endpoint. -->
                    <endpoint contract="IMetadataExchange" binding="mexHttpBinding" address="mex" />
                </service>
            </services>

            <behaviors>
                <serviceBehaviors>
                    <behavior name="MyServiceTypeBehaviors" >
                        <!-- Add the following element to your service behavior configuration. -->
                        <serviceMetadata httpGetEnabled="true" />
                    </behavior>
                </serviceBehaviors>
            </behaviors>

        </system.serviceModel>
    </configuration>

For more information on publishing metadata please see the following documentation: http://go.microsoft.com/fwlink/?LinkId=65455.
```

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 Webservice must be completed on all servers independently.

   OR

2. The installation of the Real Magnet Webservice 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 – you can follow the instructions in the Encryption Guide.

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

Once the integration is complete, in order to provision your Real Magnet account to test you must provide the following to your Implementation Project Manager or Support Representative.

- Service URL

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

Verifying Installation

In order to verify the installation Customer teams can complete end-to-end testing that includes:

- Uploading individual queries from Aptify into Real Magnet groups
- Visual confirmation of Real Magnet tracking data in Aptify

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- Confirmation that the Real Magnet subscription and unsubscribe data is being returned to Aptify

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

End-User Testing

Timeline: 4 -5 business days

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

Confirm the Integration is successfully configured in Aptify and Real Magnet

1. Login to Real Magnet
2. Select **Tools**
3. Select **Settings**
4. Select **Integration**
5. Select **Aptify Management**
6. Select **Create Upload Job**
   a. Verify that Aptify Views are accessible
7. Select an Aptify View
8. Select **Create Map**
   a. Select the column **Primary Email** under Aptify Field
   b. Select **Email** under Real Magnet Field
   c. Select **Create Schedule**
9. Select create a New Group

    a. Select **On Demand**

    b. Select **Submit**

    c. On the overview page select the **green play button**

The Aptify View will upload to Real Magnet.

Verify that tracking reports back to the test records

1. Login to Real Magnet
2. Select **Tools**
3. Select **Settings**
4. Select **Integration**
5. Select **Aptify Management**
6. Select **Manage Tracking**
    a. Verify that tracking items are selected
    b. Select **Submit**
7. Send a message to the test group
8. The next day login to Aptify
9. Find a **Person** from the test view
    a. The activity should update to the Person's Real Magnet tab

Verify that prospects are created in Aptify

1. Login to Real Magnet
2. Select **Automation**
3. On the main screen enter a campaign name (ex. Landing Page Test)
    a. Select **Go**
4. In the right column select **Landing Pages**
    a. Click **Select**
    b. Select **Create New**
    c. Select the **Your Templates** drop down
    d. Select **Business**
    e. Select **Business – Left Aligned Form**
5. In the left column select **Menu**
    a. Under Manage Select **Return to Campaign**
6. Under Option 3 select **Copy URL**
7. Select the checkbox under option 5 "Integrate this campaign with Aptify"
8. Select **Deploy Campaign**
9. Wait for the Deployment to Complete
10. Open a new tab in your browser
11. Paste in the URL copied from step 6

12. Complete the landing page select **Submit**

It is recommended that the email address submitted is Realmagnettest+#@yourdomain.com where # is the number of the test. For example if this is your first test realmagnettest+1@yourdomain.com

13. Log in to your Aptify instance
14. Search for your newly created record

Finishing the Installation

Once testing has been completed – Real Magnet will provision the Real Magnet production account.

These steps are highlighted above:

- Configuring the Real Magnet Integration with Aptify
- Configuring the Real Magnet Account
- Configuring Tracking in the Real Magnet Account

Updating tracking information in the production Aptify account

- Existing recipient History Synchronization

Existing Recipient History Synchronization

Timeline: 4 -5 business days

If recipient data from Aptify has been uploaded into Real Magnet account prior to the integration, an additional synchronization step needs to be performed to properly link Real Magnet recipients to Aptify Person records.

- Create a SQL View or Shared Person view with all records with an email address
- Create an upload job
- Enable Tracking in the integration

Notes and Additional Considerations

Browser Considerations

Due to Internet Explorer's security settings exceptions should be made for Real Magnet:

- 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 support.higherlogic.com.

Appendix

A. Definition of the Universal Webservices

Real Magnet 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. Real Magnet 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
Topiccodes	List of strings	Topic Codes associated with the record

Stored Procedures

Real Magnet Integration Web Service implements following methods:

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/topic code, which will be passed back to RealMagnet_UpdateInterestAreaSubscriptions
Name	varchar(100)	The user-friendly name of the interest area/topic code

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/topic code 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