

Portrait Dialogue



pbSmartConnections Plug- in for Portrait Dialogue

Installation Guide v1.1



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- The name of the software application
- The circumstances in which the problem arose
- What error messages you saw (if any);
- The version of the software that you were using.

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Introduction

This document provides guidelines for setting up Portrait Dialogue to communicate with the **pbSmart™ Connections** REST-based Web Service.

Version history

Version	Date	Author
1.0	02/02/2012	John Mooney
1.1	19/03/2012	Wayne Pethrick

Overview

The pbSmartConnections Plug-In is developed for **Portrait Dialogue** to communicate with the **pbSmart™ Connections** REST-based Web Service. It has been developed to work with Portrait Dialogue 5.1.

This document guides you through the process of installing the pbSmartConnections plug-in for Portrait Dialogue. The pbSmartConnections has two parts. One part will allow the sending of emails via **pbSmart™** Connections. The other part will allow the retrieval of Bounce data from **pbSmart™** Connections and allow the bounces to be process by Portrait Dialogue.

What is **pbSmart™** Connections?

pbSmart™ Connections is an email marketing application for creating, sending and tracking email marketing campaigns. For more information, see: <http://www.pbsmartconnections.com>

Setting up pbSmart™ Connections

Creating a pbSmart™ Connections account

Wayne Pethrick is responsible for the creation of a client account within pbSmart Connections. The following items are required in order for an account to be established and should be forwarded to wayne.pethrick@pb.com:

1. **Account Name:** The account name will be used in system tracking links unless a custom tracking domain is used.
2. **Email Address for Account Admin:** This email address will be used as the system accounts username. Additional user logins can be created after account creation. It is suggested that this email address be that of the PBS employee responsible for account setup on behalf of the client (i.e. the Account Administrator)
3. **Company Name:** The customer's company name. Will be seen publicly and used for CANSPAM compliance.

Account Name	
Email Address for Account Admin	
Company Name	

Login credentials will then be issued to the Account Administrator via email. The account can then be accessed via:

<http://enterprise.pbsmartconnections.com/>

Setting up pbSmart™ Connections

To proceed, you will need to have a **pbSmart™ Connections** account. See the link in the previous section if you do not yet have a **pbSmart™ Connections** account

The Portrait Dialogue pbSmartConnections Plug-In makes use of the API provided by **pbSmart™ Connections** For the plug-in to function it must have certain privileges and information on how to access your **pbSmart™ Connections** account. The following pages in this section will detail what you need to do to setup **pbSmart™ Connections** to allow the plug-in to function.

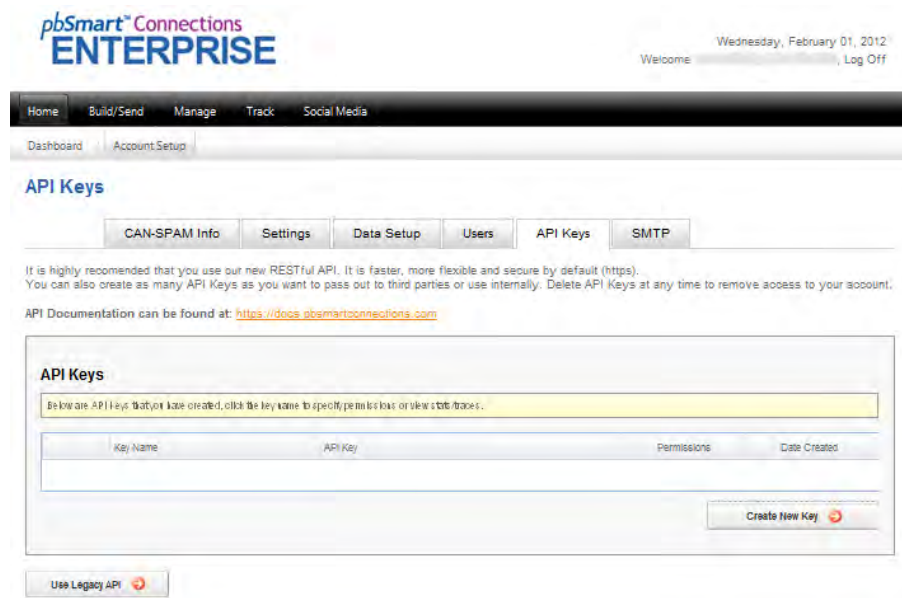
To proceed with the following steps please log in to your **pbSmart™ Connections** account.

Creating an API Key

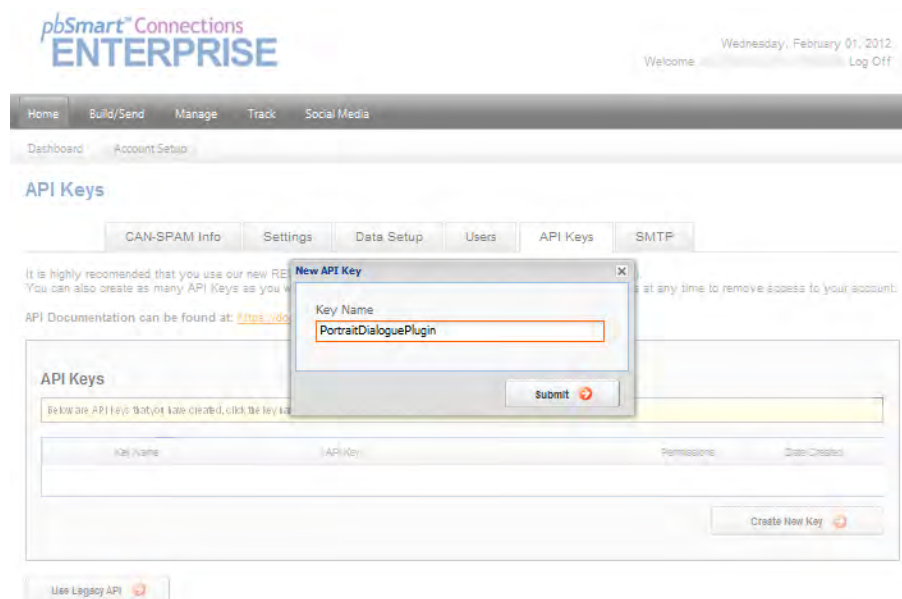
We need to create an API Key that the plug-in will use to access you **pbSmart™ Connections** account. This API Key can be given specific

permissions and is unique to your account. Please do not give out this API Key.

1. Firstly in the Home section go to **Account Setup** and select the **API Keys** tab. You should see a screen similar to the one shown here.



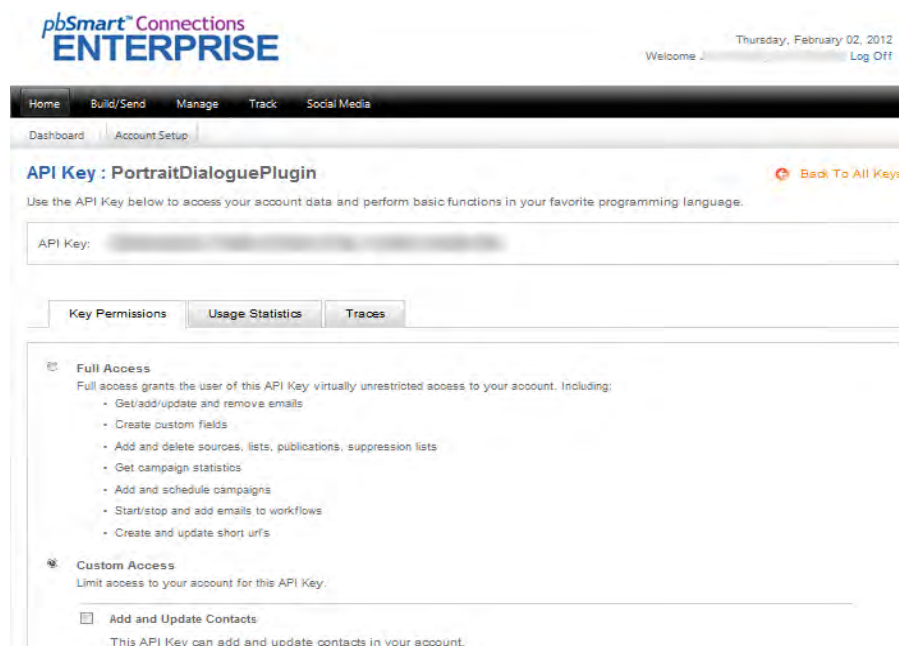
2. Click the **Create New Key** button and you should see the screen below. Type in a name for the new API Key. We have entered **PortraitDialoguePlugin** but you can use any name you wish. Finally click the **Submit** button.



3. After clicking the submit button you will see the next screen which shows you the API Key that has been created and will allow you to assign some permissions to the new API Key.

We have blurred out the API Key we have generated as it should be kept private because it will allow access to your **pbSmart™ Connections** account. Take a note of the API Key as this is required later on during the setup of the plug-in.

The API Key should be in the following format: **????????-????-????-????-????????????**



4. Now we need to set the API Key permissions. If you wish you could select the **Full Access** option. If you prefer to restrict access to only that needed by the plug-in then select the **Custom Access** option as we have done in the screen image above.

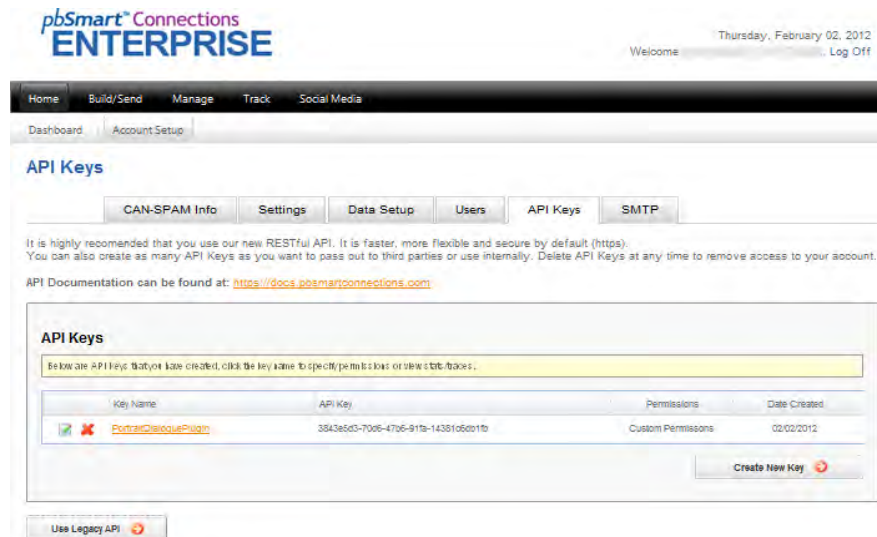
If you do select the **Custom Access** option then you will need to select the items that are required by the plug-in. Make sure you select the permissions that are shown in the following image. These permissions are required for the plug-in to function correctly.

- Add and Update Contacts**
This API Key can add and update contacts in your account.
- Get Contacts**
This API Key has access to all contacts in the system including custom fields, history and associations.
- Relay Send Access**
This API Key can relay sends through your account.
- Workflow Access**
Along with starting and stopping workflows, this API Key can add and remove emails to workflows.

5. Select the **Back To All Keys** link near the top right of the screen and that will return you to the next screen. We have just created

a new API Key for the plug-in to use and set the permissions for the API Key.

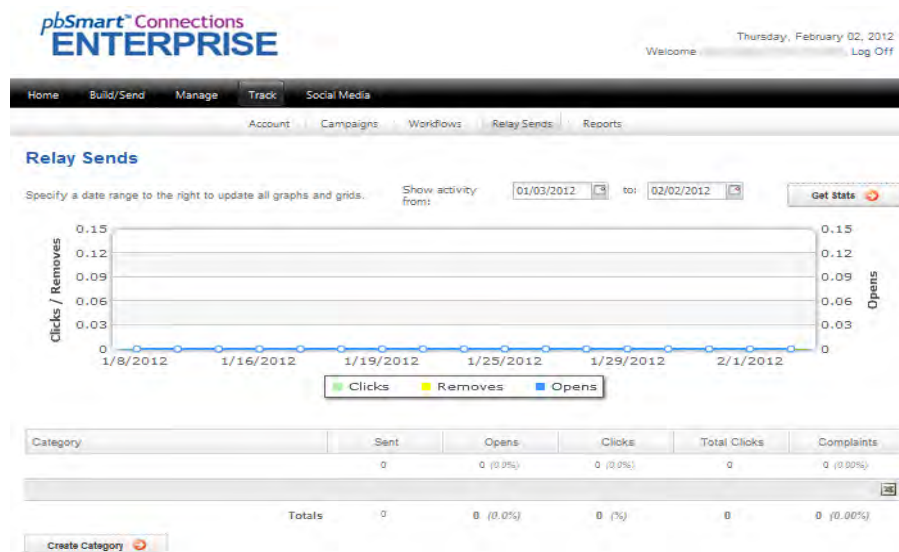
You should now see this screen with your new API Key listed.



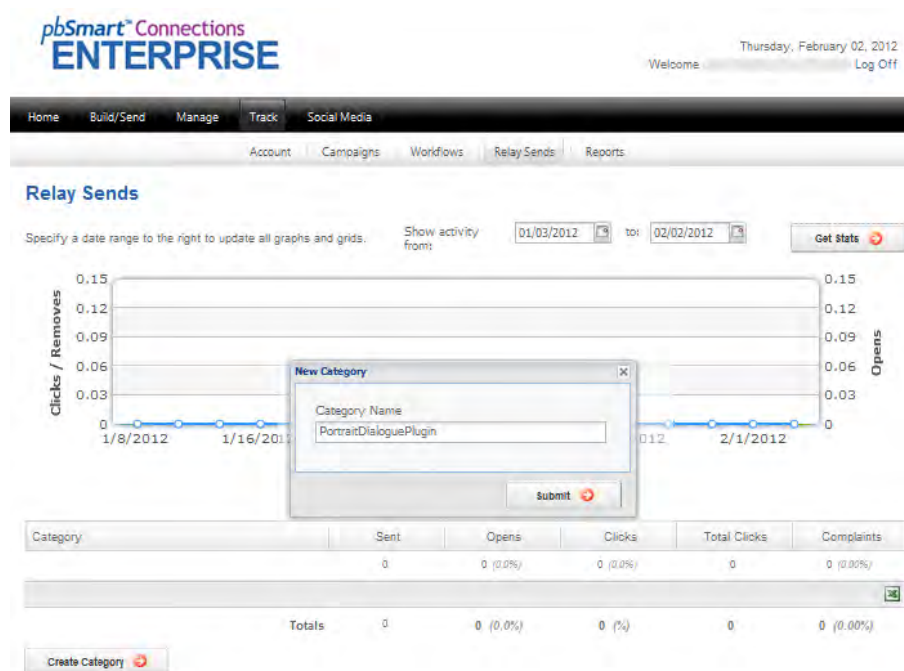
Creating a pbSmart Connections category

Most actions relating to Sending Email in **pbSmart™ Connections** require the use of a Category. The Category is a way of grouping email messages send via the RelaySend API. The pbSmartConnections plug-in will use a single category. The following describes how to create the Category within **pbSmart™ Connections**.

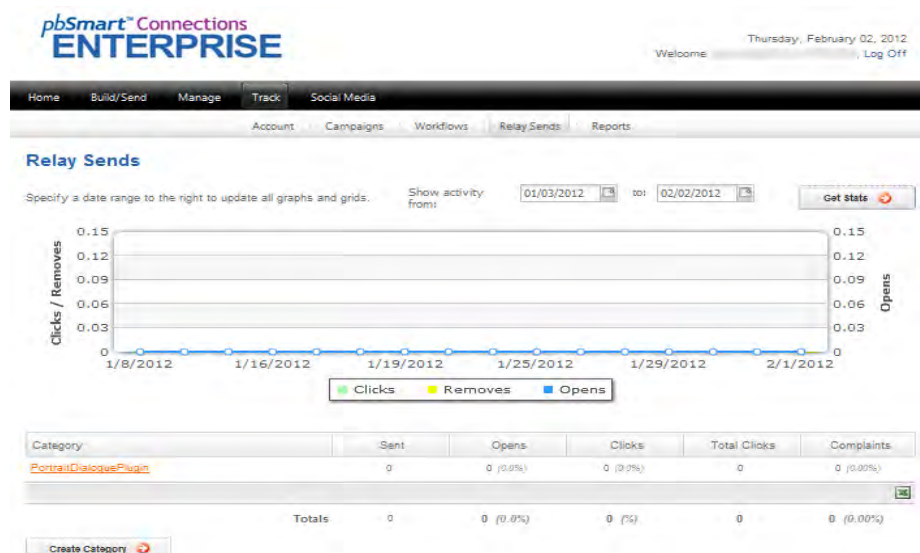
1. Firstly in the **Track** section go to **Relay Sends**. You should see a screen similar to the one shown here.



- Click the **Create Category** button and you should see the screen below.

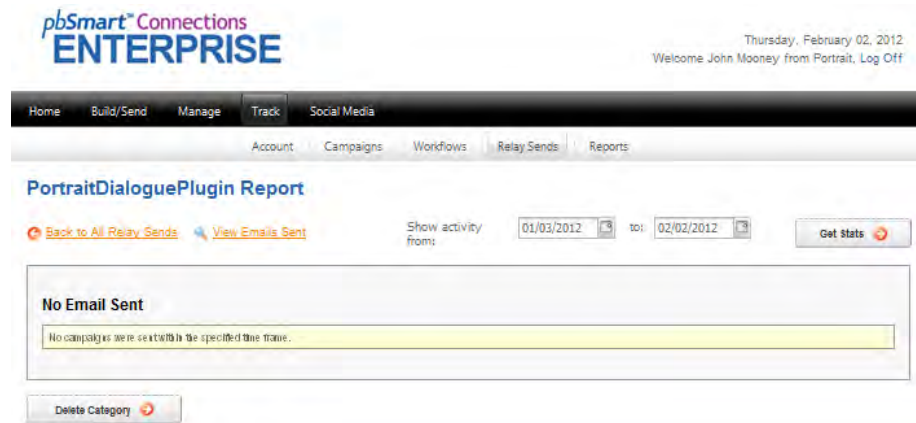


- Type in a name for the new Category, we have entered *PortraitDialoguePlugin* but you can use any name you wish. Finally click the **Submit** button.
- After clicking the submit button you will see the next screen which should list your new Category.

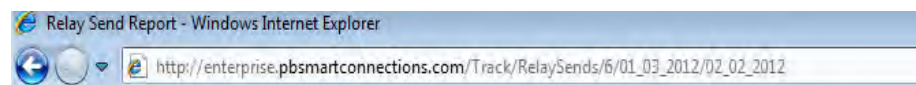


- The pbSmartConnections plug-in requires a Category ID as a setting. So we need to locate the Category ID for the Category we have just created. As the Category ID is not actually shown we need to retrieve a number from a URL.

So we need to click on the new category name we just created in the list of categories as shown in the image above. So in our setup we would click on the PortraitDialoguePlugin name in the list. Doing this should display the next screen.



You should also see the URL of the page we are looking at in the address bar of your internet viewer. Hopefully what you see is very similar to the address shown in our image here. The date ranges at the end may be different.



6. Now the Category ID we need to get from this URL is highlighted in green in the next image. There should be a number between the backslashes following the RelaySends text. In ours it is /6/. The number 6 is our Category ID and we need to keep track of this for use later on in the setup process.



Installing pbSmartConnection Plug-In

The pbSmartConnections plug-in must be installed on the Portrait Dialogue Server.

To install the pbSmartConnection files run the Setup.exe. This is a simple install wizard that only requires that you specify the path where the files will be copied to.

The pbSmartConnections plug-in consist of the following files:

- pbSmartConnections.dll
- pbSmartConnectionsBounce.exe
- pbSmartConnectionsBounce.exe.config
- pbSmartConnectionsBounce.InstallState
- EDWrapper.dll
- Hunny.Base.dll
- Hunny.Mime.dll
- Interop.MHOutputChannelPlugins.dll
- Interop.MHPluginTypeLibrary.DLL
- Newtonsoft.Json.dll

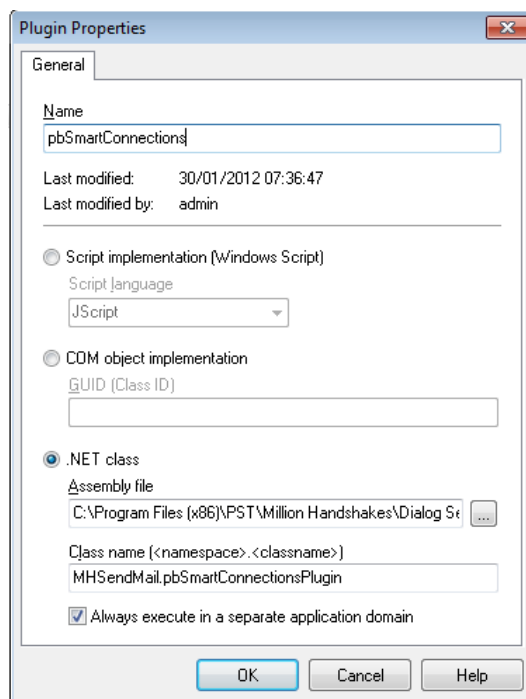
Note: The setup also installs a windows service for bounce email processing.

Setting up Portrait Dialogue Admin for sending email

Plugin Repository Configuration

After the plug-in files have been installed on the server, some configurations are needed in Dialogue Admin:

1. If not already running, start **Dialogue Admin**, and select the instance where this plug-in will be used.
2. In the tree locate the following catalog: **Resources > Plugin > repository > Output channel plugins**
3. Right click on the catalog named **Output channels plugins** and select **New...**
4. Give a **Name** to this plug-in. In our example we are using "pbSmartConnections".
5. Select the **.NET class** option.
6. Select the **Assembly file** by clicking on the browse ... button. Here we need to search for the **pbSmartConnections.dll** file. It will be located in the path specified when you ran the pbSmartConnections install. The default location is:
 - C:\Program Files (x86)\PST\Million Handshakes\Dialog Server\DialogServerPlugins\pbSmartConnections
7. Set the **Class name (<Namespace>.<Classname>)** to:
 - MHSendMail.pbSmartConnectionsPlugin
8. Leave the **Always execute in a separate application domain** option checked.
9. Click **OK** to close the dialog.



Configuring Email Channel Type setup

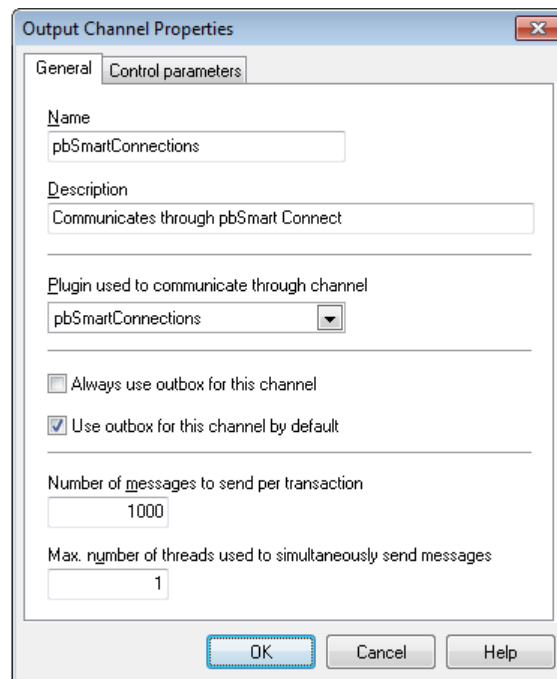
After the pbSmartConnections plugin has been registered in Dialogue we then need to configure a new Email Output Channel and a new Email Message Type.

Output Channel

1. If not already running, start **Dialogue Admin**, and select the instance where this plug-in will be used.
2. In the tree locate the following catalog: **Channel types > Email > Output channels**
3. Right click on the catalog named **Output channels** and select **New...**

The General tab

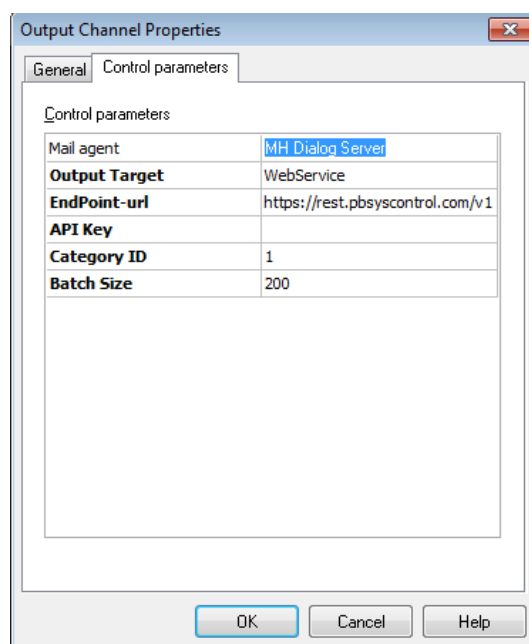
1. Give a **Name** to this output channel-in. In our example we are using "pbSmartConnections".
2. Provide a **Description** of this output channel.
3. The **Plugin used to communicate through channel** should be set to the name we assigned the plug-in during the steps in the **Plugin Repository Configuration** section. In our case it was "pbSmartConnections".
4. Fill out the rest of the dialog as shown below.



The Control parameters tab

We will need to adjust some of the control parameters for the plug-in to allow it to access your **pbSmart™ Connections** account to send emails.

1. In the API Key parameter we need to enter the API Key we created when we setup your **pbSmart™ Connections** account in the earlier section. This is the API Key we suggested you write down for use later on in the setup process.
2. In the Category ID parameter we need to enter the ID of the Category we created when we setup your **pbSmart™ Connections** account in the earlier section. This is the ID number taken from a URL that we suggested you write down for use later on in the setup process.



3. Click **OK** to exit the Output channel configuration.

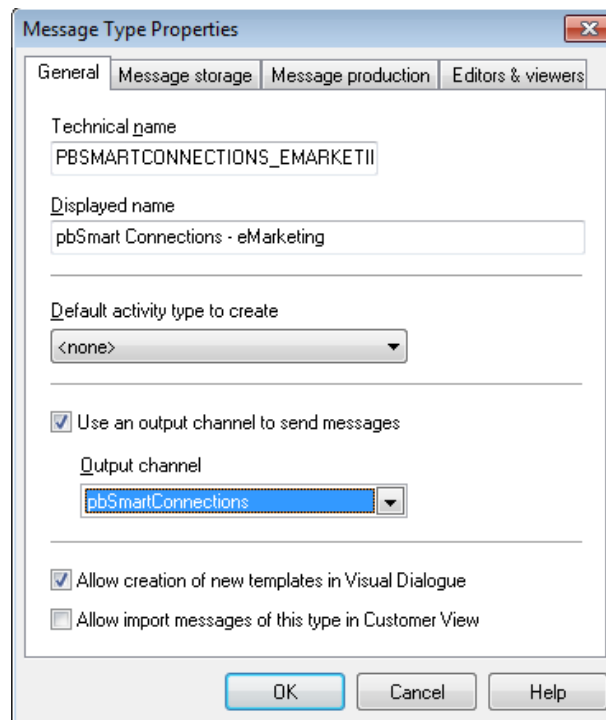
Message type setup

Next, we will set up some Messages types:

4. If not already running, start **Dialogue Admin**, and select the instance where this plug-in will be used.
5. In the tree locate the following catalog **Channel Types > Email > Output channels**.
6. Right click on the catalog named **Message types** and select **New...**

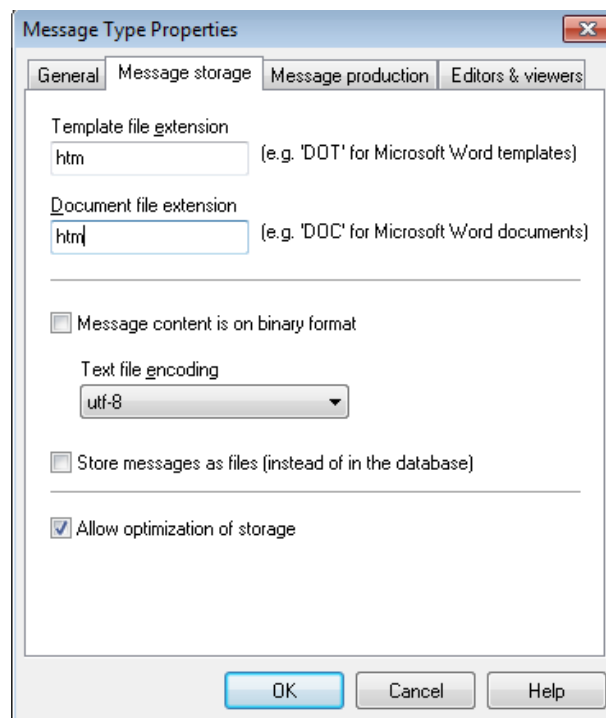
The General tab

1. Give a **Technical name** to this message type. In our example we are using "PBSMARTCONNECTIONS_EMARKETING".
2. Create a **Displayed name**. This name will be the name users see in Visual Dialogue for the message type.
3. Check the **Use an output channel to send messages** option and then select the **Output channel** we just created. Following our example the Output channel is pbSmartConnections.
4. Finally check the **Allow creation of new templates in Visual Dialogue** option.



The Message storage tab

1. Entry "**htm**" for both the **Template file extension** and the **Document file extension**
2. Check the **Allow optimization of storage** option



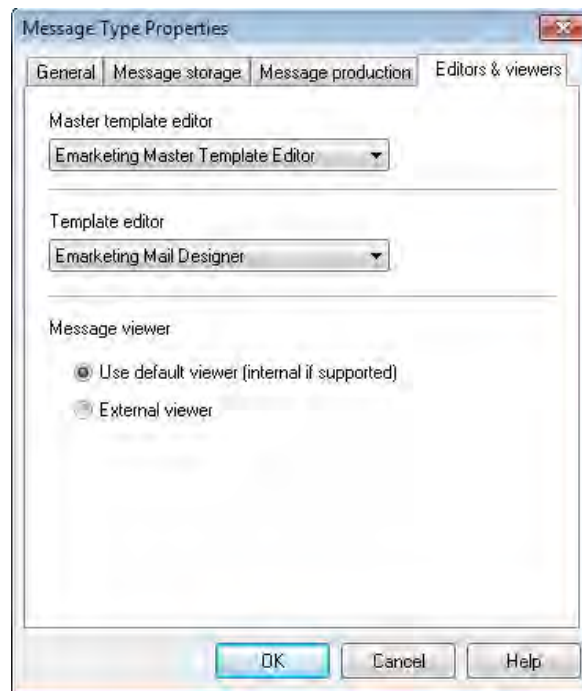
The Message production tab

1. Check the Enable message production option.
2. For the Plugin used to produce messages you will need to select MH Text Merge form the list.
3. Also check the Produce one message per customer option.



The Editors and Viewers tab

1. For the **Master template editor** select Emarketing Master Template Editor from the list.
2. For the **Template editor** select Emarketing Mail Designer from the list.
3. Lastly for the **Message Viewer** make sure Use default viewer is the option selected.



4. Click **OK** to exit the Output channel configuration.

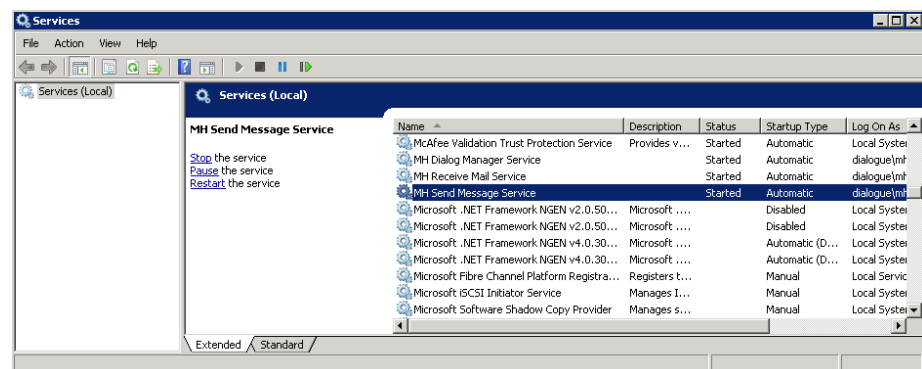
Note: You should also set up a Message type for plain HTML messages.
Create a new Message type. A suggestion for the technical name could be "PBSMARTCONNECTIONS_HTML" and a Displayed name of "pbSmart Connections - HTML Email".
Then follow the same procedure as described until this last step, the "Editors & viewers" tab where you select "Default Editor" for both Master template editor and Template Editor

Enabling the MH Send Message Service

For an instance in Portrait Dialogue to be able to send messages the **MH Send Message Service** must be running and enabled for the instance. There are two steps to commit for enabling the service:

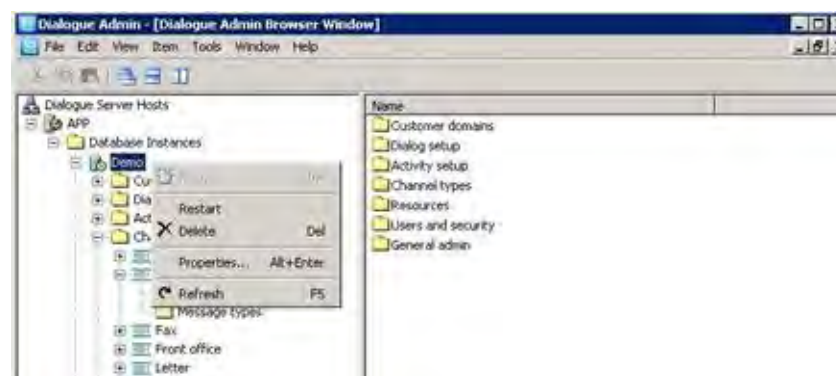
Checking the MH Send Message Service status

1. Open the **Administrative Tools** menu and select **Services**. If the service **MH Send Message Service** is not running then **Start** it.



Enabling the MH Send Message Service for the instance

1. Secondly, enable this service for the instance that will send messages by opening up **Dialog Admin**, right-click the instance in use and select **Properties...**



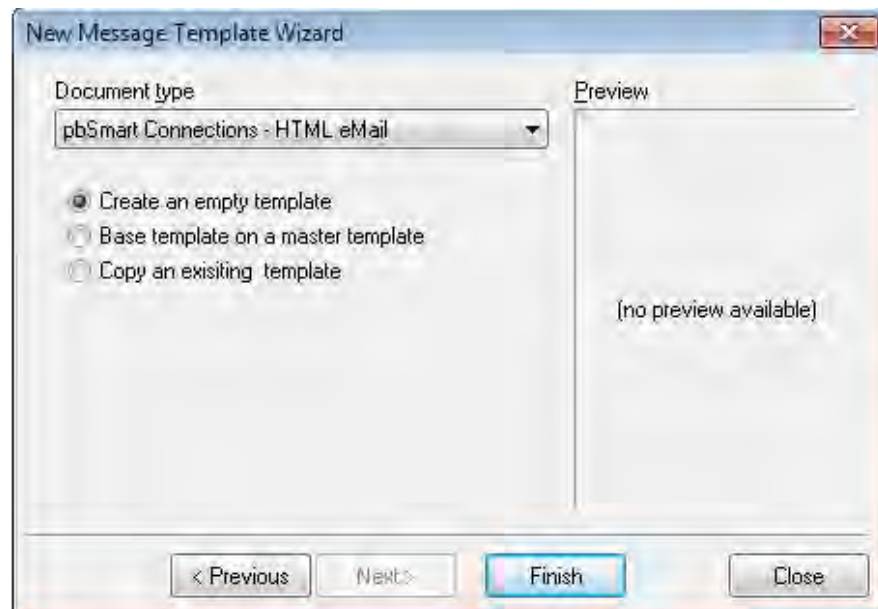
2. In the properties dialog make sure to check mark the **Enable Send Messages service** option.



Using pbSmartConnections Plug-in in Visual Dialogue

To create an email message that is using the new plug-in is straight forward:

1. Open **Explorer** in Visual Dialog, right click and select **New, Message template**.
2. Name the template and select domain as the source for this message.
3. Click **Next**.
4. In the **Document type**, select one of the Message types that are enabled for using this plug-in.



5. Click **Finish** to create the new message template and start designing the content.

Setting up Portrait Dialogue Admin for bounce processing

You will need to have a BoogieBounce API license key. This is the license key you receive from Customer Support when you purchase the BoogieBounce API. Without this bounce processing will not be possible.

Bounced Email System Parameters

After the plug-in files have been installed on the server, some configurations are needed in Dialogue Admin for bounce processing to occur.

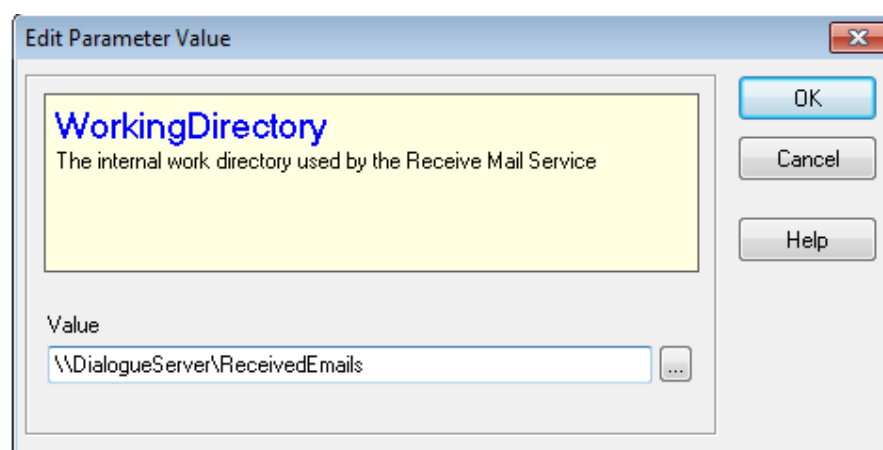
We need to set the internal working directory used by the Receive Mail Service. In this folder structure, all bounced e-mails are stored as separate files per bounce code

1. If not already running, start **Dialogue Admin**, and select the instance where this plug-in will be used.
2. In the tree locate the following catalog **General admin > Parameter collections > Receive mail service**.

You should see a list of parameters. In this list there will be an entry called **WorkingDirectory**.


Parameter name	Parameter type
P BBLicenseKey	MH_STRING
P CheckMailInterval	MH_INTEGER
P EnableService	MH_BOOLEAN
P WorkingDirectory	MH_UNC_PATH

3. Double click the **WorkingDirectory** parameter and you will be shown the **Edit Parameter Value** dialog. Click the **...** button and browse to a folder to use for received emails. In our example we have selected the ReceivedEmails folder on the DialogServer.



4. Click **OK** to exit the Output channel configuration.

Our **WorkingDirectory** parameter should now have a path setting, as our example shows here.

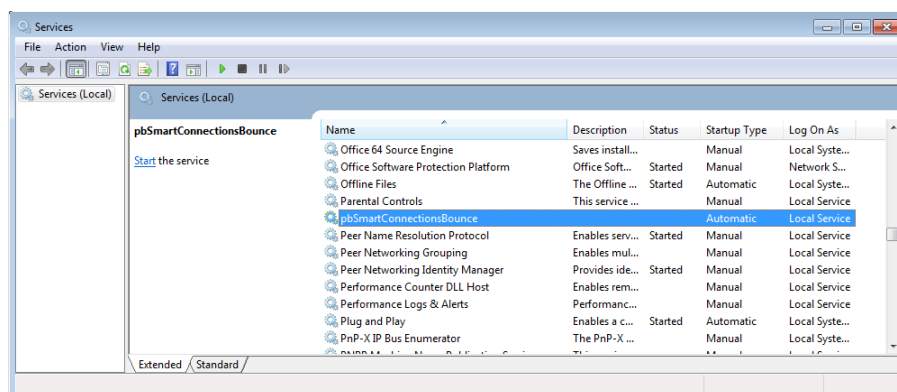
 WorkingDirectory: MH_UNC_PATH \\DialogueServer\ReceivedEmails

Bounced email setup

Setting up the Bounce windows service

The pbSmartConnections Bounce service was installed as part of the setup that was run earlier.

1. Open the **Administrative Tools** menu and select **Services**. The setup has installed the service as shown here.



pbSmartConnectionsBounce.exe.config

We need to make some changes in the configuration file for the pbSmartConnectionsBounce windows service to function. You will need to open up the **pbSmartConnectionsBounce.exe.config** file in an editor such as notepad.

The image below shows a bunch of entries in the configuration file that are of interest to us.

- **BrowseBouncesInterval**: This setting is used to control the time in minutes between the service checking for bounces. The default is 1440 minutes or 1 day.
- **CategoryID**: This setting controls the Category in **pbSmart™ Connections** that is checked for bounces. This ID needs to be set now and should be the Category ID we got earlier in the setup process. An example is **value="6"**
- **ApiKey**: This is the key we generated early on in the setup that allows access to your **pbSmart™ Connections** account. Again set the value of this now.
- **EndPoint**: is a setting that tells the service where to connect to. This should be left as is.
- **BrowseBouncesPageSize**: This is a setting that can be tweaked to optimize the browse retrieval of data. For now leave this at the default setting.
- **NextDateFromUTC**: This is the next date that will be used to retrieve bounce data from the server. It will be updated each time a successful retrieval of bounce data occurs. For now leave this as it is.

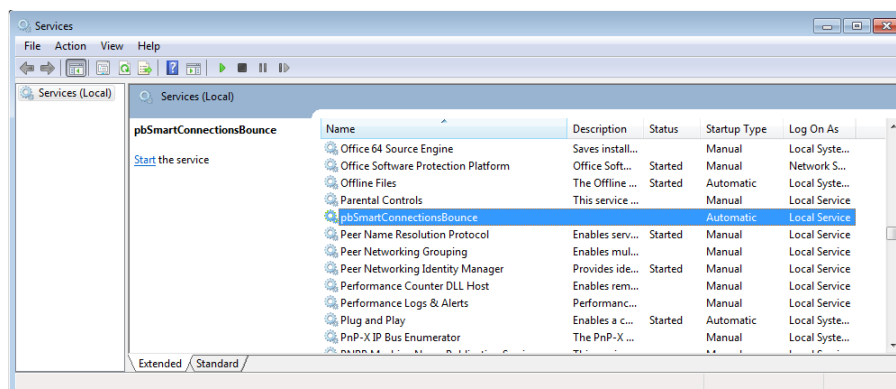
- **PickupDirectoryLocation**: This is where the email files generated will be picked up by Portrait Dialogue. This should be the path that was set in the WorkingDirectory previously.

```
<appSettings>
  <!--The interval to check for bounces in minutes. Min 1 minute-->
  <add key="BrowseBouncesInterval" value="1440" />
  <!--pbSmart Connections Category ID to browse for bounces in-->
  <add key="CategoryID" value="" />
  <!--pbSmart Connections API Key-->
  <add key="ApiKey" value="" />
  <!--pbSmart Connections End point URL-->
  <add key="EndPoint" value="https://rest.pbsyscontrol.com/v1/" />
  <!--100 to 1000-->
  <add key="BrowseBouncesPageSize" value="500" />
  <!--This is the date that the next check for bounces will look from-->
  <add key="NextDateFromUTC" value="2012-01-01T01:00:00.4413377Z" />
  <!--This is where PD will get the bounce emails from-->
  <add key="PickupDirectoryLocation" value="" />
</appSettings>
```

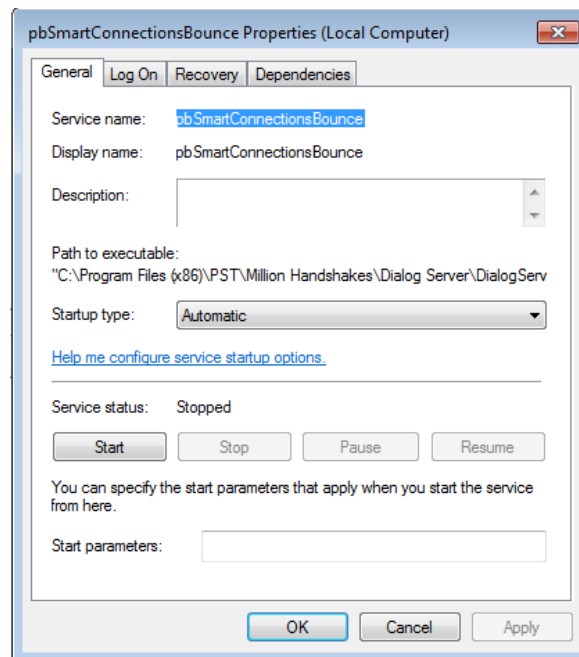
Finally save this file.

Setting the Service properties

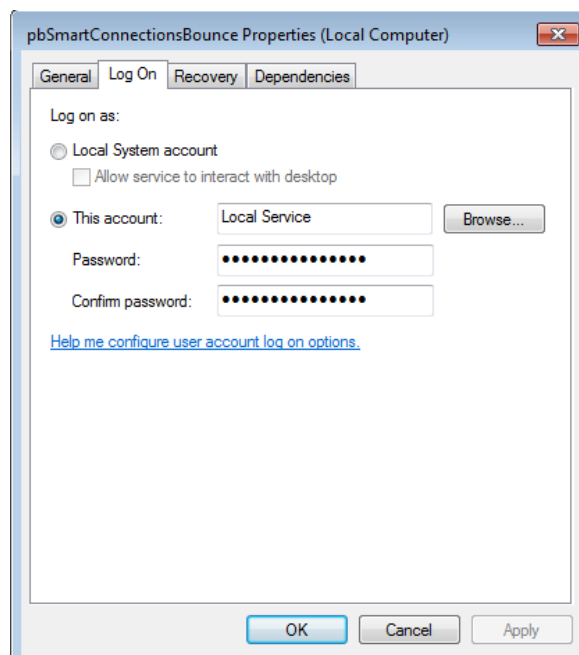
1. Open the **Administrative Tools** menu and select **Services**. The setup has installed the service as shown here.



2. Right click on the service name **pbSmartConnectionsBounce** and select **Properties** and you will see this.



3. Click on the **Log On** tab.



4. Here we need to change the account being used to log on for the service.

The account to use needs to have access to read and write files to both the folder where the service has been installed and the WorkingDirectory for Portrait Dialogue where the files will be

5. Click **OK**.
6. Finally we need to start the service. Right-click on the service pbSmartConnectionsBounce and select **Start**.

Creating a Portrait Dialogue Bounce Configuration

At this point we will need to setup a bounce configuration in Dialogue Admin.

Bounce Configurations are created here in Dialogue Admin.

1. If not already running, start **Dialogue Admin**, and select the instance where this plug-in will be used.
2. In the tree locate the following catalog: **Dialog Setup > Bounce email setup > Bounce configuration**.

Follow the Portrait Dialogue documentation for creating a Bounce Configuration. The type of configuration we need to setup is where the **Incoming Mail Server Type** is **NONE**.

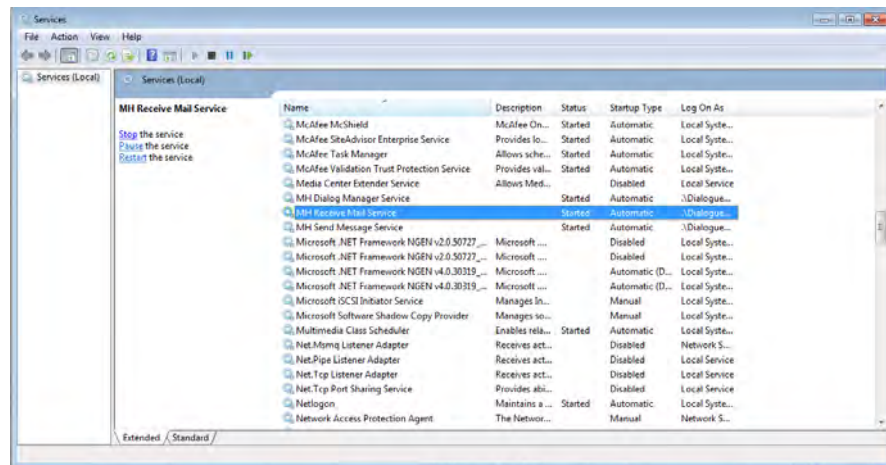
The **NONE** type of server means it will process bounce email from disk.

Enabling the MH Receive Mail Service

For an instance in Portrait Dialogue to be able to receive mail the **MH Receive Mail Service** must be running and enabled for the instance. There are two steps to commit for enabling the service:

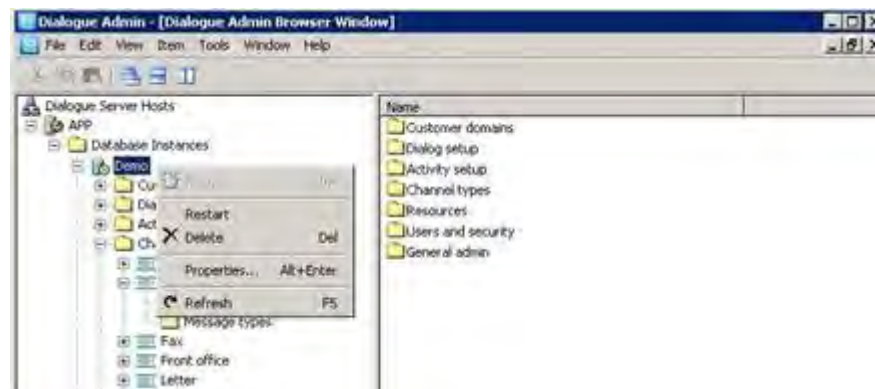
Checking the MH Receive Mail Service status

1. Open the **Administrative Tools** menu and select **Services**. If the service **MH Receive Mail Service** is not running then **Start** it.



Enabling the MH Receive Mail Service for the instance

1. Secondly, enable this service for the instance that will send messages by opening up **Dialog Admin**, right-click the instance in use and select **Properties...**



2. In the properties dialog make sure to check mark the **Enable Receive Mail service** option.

