



Redpoint Interaction v6.6

External Provider Configuration



Redpoint Global Inc., 888 Worcester Street, Suite 200, Wellesley, MA 02482 USA
T: 1 781-725-0250 F: 1 781-583-0464 www.redpointglobal.com

Contents

1	About This Document	9
2	Push Notifications	10
2.1	Windows Azure/Azure Push Direct Notification Hub.....	10
2.1.1	Notification Hub Configuration	10
2.2	Push Notification for Windows Phone	10
2.2.1	RPI Windows Phone Push Notification Demo App Deployment	10
2.2.2	RPI Windows Phone Push Notification Demo App Configuration	13
2.3	Push Notification for Android Phone	16
2.3.1	PC Pre-requisites.....	16
2.3.2	Push Notification Client App Deployment.....	16
2.3.3	Creating and Setting up a Google API project.....	19
2.3.4	Enabling the Google Cloud Messaging (GCM) Service.....	20
2.3.5	Obtaining an API Key.....	21
2.3.6	Android Phone Configuration	24
2.4	Push Notification for iOS Phone.....	25
2.4.1	Mac Pre-requisites.....	25
2.4.2	RPI iOS Push Notification Demo App Deployment.....	25
2.4.3	Creating and Setting Up an iOS project	31
2.4.4	Utilizing the Certificate on Windows Azure	32
2.4.5	RPI iOS Push Notification Demo App Configuration.....	33
2.5	Google Firebase	37
2.5.1	Creating and Configuring a New Google Project.....	37
2.5.2	Enabling Google Firebase Cloud Messaging API Key.....	38
2.5.3	Provisioning an OAuth Client ID.....	40
2.5.4	Provisioning a Google Firebase Cloud Messaging Project.....	41
2.6	Airship Push Direct Notification Configuration	44
2.6.1	Creating a Project	44
2.6.2	Android & iOS Phone Configuration.....	47
2.7	Twilio Notify	48
2.8	Amazon Pinpoint Push Notification	52
2.8.1	Amazon Pinpoint Push Notifications Configuration	52

3	Social Configuration.....	56
3.1	Facebook.....	56
3.1.1	Supported Facebook Connectors.....	56
3.1.2	Creating a Facebook App	57
3.1.3	Creating an Ad Account and Linking it to the Facebook App ID	63
3.1.4	Setting up the Payment Method.....	64
3.1.5	Create a Pixel in Business Manager (Optional).....	66
3.1.6	Domain Verification (Optional)	66
3.2	LinkedIn	67
3.2.1	Creating a New LinkedIn App	70
3.3	Twitter.....	72
3.3.1	Creating a New Twitter App	74
3.4	YouTube	76
3.5	Google Ads Customer Match	83
3.5.1	Provision a Project within GCP	83
3.5.2	Create API and OAuth Credentials	84
3.5.3	Create Google Ads Account.....	87
3.5.4	Enable Customer Match Feature	89
3.5.5	Locating Developer Token	89
3.5.6	Access Audience Lists	89
3.6	Yahoo! Japan – Data Onboarding.....	91
3.6.1	Create Yahoo! Japan Account	91
3.6.2	Create OAuth Application	91
3.6.3	Retrieve OAuth Application Credentials.....	93
3.6.4	Retrieve Yahoo! Japan Account Id.....	94
3.6.5	Create New Yahoo! Japan Ads Account	95
4	CRM Configuration	96
4.1	Microsoft Dynamics 365 Configuration.....	96
4.1.1	Provisioning a Microsoft Dynamics 365 Trial Account.....	96
4.1.2	Configuring Microsoft Dynamics 365.....	101
4.1.3	Enabling OAuth 2.0 for Existing Microsoft Dynamics CRM channels	102
4.2	Salesforce.com Configuration	104

5	Email Service Provider Configuration.....	106
5.1	Data Management Email Results Mechanism.....	106
5.2	Amazon Pinpoint Email Configuration.....	107
5.2.1	Creating new Amazon Pinpoint Email project.....	107
5.2.2	Enabling Amazon Pinpoint Email on existing project.....	110
5.2.3	Create Pinpoint import Segment ARN role.....	112
5.2.4	Configure Amazon Kinesis for Event Data Processing.....	112
5.3	CheetahMail Account Configuration.....	119
5.3.1	Creating a Subscriber List.....	121
5.3.2	Creating a Segment.....	123
5.4	SendGrid Account Configuration.....	126
5.4.1	Setting up an Account.....	126
5.4.2	Setting up an API key for SendGrid Web API v3.....	128
5.5	Acoustic Account Configuration.....	130
5.6	Instiller Account Configuration.....	140
5.6.1	Account Provisioning and Signing In.....	140
5.6.2	Field Maps Configuration.....	140
5.6.3	Setting Up the Time Zone.....	143
5.7	SparkPost Account Configuration.....	144
5.7.1	Account Provisioning and Signing In.....	144
5.7.2	API Key Provisioning.....	145
5.7.3	Sending and Tracking Domain Configuration.....	147
5.8	Responsys Account Configuration.....	149
5.8.1	Creating the Folder.....	149
5.8.2	Creating the Profile List.....	151
5.8.3	Creating the Content Folder.....	153
5.8.4	Creating the Link Table.....	154
5.8.5	Adding links into the Link Table.....	156
5.8.6	Creating an Export Event Data Feed Job.....	158
5.8.7	Obtain SSH2 Private and Public Keys.....	160
5.9	Salesforce Marketing Cloud (SFMC) Email Account Configuration.....	161
5.9.1	Provision an SFMC Core Account.....	161
5.9.2	Post-Provisioning Steps.....	161

5.9.3	Configuring PGP Encryption for Events Data Extract	162
5.9.4	Configuring PGP Encryption for Data Extension Extracts	169
5.9.5	Enabling OAuth Authentication for SFMC	173
5.10	DotDigital Account Configuration	176
5.10.1	Creating a Free DotDigital Account.....	176
5.10.2	Create API user	176
5.10.3	Setting Up External Dynamic Content.....	178
5.10.4	Configure External Content Shared Folder	179
5.11	Listrak Account Configuration	180
5.12	Mailchimp Account Configuration.....	181
5.12.1	Create a Mailchimp Account	181
5.12.2	Provision a New API Key	182
5.12.3	Configuring the Service URL.....	183
5.12.4	Re-subscribe Contacts.....	184
5.13	Cordial Account Configuration	185
5.13.1	Sign Into Cordial Portal	185
5.13.2	Provision New API key.....	186
5.13.3	Enable Google Cloud services.....	187
5.14	LuxSci Account Configuration	188
5.14.1	Create API Integration	188
5.14.2	Retrieve API Integration Keys	189
5.14.3	Enable Event Tracking.....	190
5.14.4	Enable SMTP Header Tracking	191
5.15	Paubox Account Configuration.....	192
5.15.1	Retrieve the Host URL	192
5.15.2	Retrieve API Username and API Key.....	192
5.16	Amazon Simple Email Service (SES) Account Configuration	193
5.16.1	How to set up configuration set.....	193
5.16.2	Amazon SES Performance Limitations	200
6	SMS Provider Configuration.....	201
6.1	Amazon Pinpoint SMS Configuration	201
6.1.1	Creating new Amazon Pinpoint SMS project.....	201
6.1.2	Enabling Amazon Pinpoint SMS on existing project	204

6.1.3	Create Pinpoint import Segment ARN role.....	206
6.1.4	Configure Amazon Kinesis for Event Data Processing.....	206
6.2	Twilio Account Configuration.....	213
6.2.1	Getting an Account SID and Authorization Token	213
6.2.2	Getting a Twilio number	215
6.3	Vibes Account Configuration.....	217
6.3.1	Vibes Configuration.....	217
6.3.2	Vibes Performance Limitations	217
7	External Content Provider Configuration.....	218
7.1	Drupal.....	218
7.1.1	Service Module Installation	218
7.1.2	Creating a Service Endpoint	220
7.1.3	Creating Content Type.....	222
7.2	Umbraco.....	224
7.3	Google Drive.....	225
7.3.1	Creating and Configuring a Google Project.....	225
7.3.2	Enabling the Google Drive API	226
7.3.3	Provisioning New API Credentials.....	227
7.4	Microsoft OneDrive	232
7.5	Concrete5.....	235
7.5.1	PHP Server Installation.....	235
7.5.2	Concrete5 Installation	238
7.5.3	Concrete5 Management	243
7.5.4	Concrete5 Users and Groups	247
7.5.5	Concrete5 System & Settings > Allowed File Types.....	250
7.6	Magento.....	251
7.6.1	Setting up XAMPP and Magento Admin Panel.....	251
7.6.2	Setting up Credentials for RPI Configuration.....	254
7.7	Razuna	257
7.7.1	Razuna Installation	257
7.7.2	Setting Up a Tenant.....	261
7.7.3	Users.....	263

7.8	Azure Storage.....	266
7.8.1	Azure Account Configuration.....	266
7.8.2	Adding an Azure Storage Container.....	268
7.9	WebDAV.....	273
7.9.1	Installing WebDAV.....	273
7.9.2	Enabling and adding an authoring rule in WebDAV.....	273
7.9.3	Logging into the WebDAV site.....	276
7.10	Box.....	278
7.11	Amazon AWS S3.....	282
7.11.1	Enable Default Encryption for an S3 Bucket.....	282
7.11.2	Create Master key for AWS-KMS.....	283
7.12	Google Cloud Storage.....	286
7.12.1	Create Google Cloud Storage Bucket.....	286
7.12.2	Create API Credentials.....	286
7.12.3	Set the IAM Permissions.....	289
7.13	SharePoint Online.....	293
7.14	Cloudinary.....	295
7.15	Contentful.....	297
8	RSS Configuration.....	302
8.1.1	Create application in FeedPress.....	302
8.1.2	Validate FeedPress feed alias.....	304
8.1.3	Update feed settings after a new RSS feed has been published.....	305
8.1.4	Logging Out from FeedPress.....	306
9	Web Adapter Provider Configuration.....	307
9.1	Kissmetrics Configuration.....	307
9.1.1	Creating a New Website.....	307
9.1.2	Getting the Base URI.....	308
9.1.3	Getting the Tracking API Key and Global Identifier.....	308
9.1.4	Getting the API Token.....	309
9.1.5	Getting the Account Name.....	310
9.1.6	Recording Events and Properties.....	311
9.1.7	Creating Unique Visit Metrics.....	311

9.1.8	Creating Visit Metrics	311
9.2	Bitly Configuration.....	313
9.3	Rebrandly Configuration	317
9.3.1	Requesting an oAuth Client ID and Client Secret keys.....	317
9.3.2	Additional Config Settings	317
9.3.3	Linking your Rebrandly Domain	318
10	Queue Provider Configuration.....	319
10.1	Apache ActiveMQ	319
10.1.1	Install/Uninstall ActiveMQ as a Windows-NT Service.....	321
10.1.2	Using ActiveMQ as the Default Queue Provider.....	321
10.2	Azure Service Bus	323
10.3	Azure Event Hubs	327
10.3.1	Provisioning the Storage Container Name and Connection String	327
10.3.2	Provisioning the Event Hubs Name and Connection String.....	329
10.4	RabbitMQ	331
10.5	Google Pub/Sub	333
10.5.1	Creating a Topic in Google Pub/Sub.....	333
10.5.2	Creating a Subscription in Google Pub/Sub	334
10.5.3	Setting up Windows Environment Variables.....	335
10.6	Kafka - AWS	337
11	Cache Configuration	339
11.1	Azure Redis Cache	339
11.1.1	Azure Redis Cache provisioning	339
11.1.2	Web Processor Site Configuration	340
11.2	Amazon DynamoDB Accelerator (DAX)	341
11.2.1	Launch an Amazon Instance.....	341
11.2.2	Create an IAM and User Policy	344
11.2.3	Configure Your Amazon EC2 Instance.....	347
11.3	Alachisoft NCache	348
11.3.1	Download and Setup of NCache.....	348
11.3.2	Configuring RPI to use NCache	350
11.4	Azure CosmosDB as a Cache	352

11.4.1	CosmosDB Cache Configuration	352
12	Survey Provider Configuration	357
12.1	SurveyMonkey	357
12.1.1	Registering a SurveyMonkey App	357
12.2	Alchemer	360

1 About This Document

This document provides details on the steps to be undertaken to configure external providers to work with Redpoint Interaction (RPI).

Full details of the parallel steps to be undertaken within the RPI client application's Configuration Workbench can be found in the RPI User Guide.

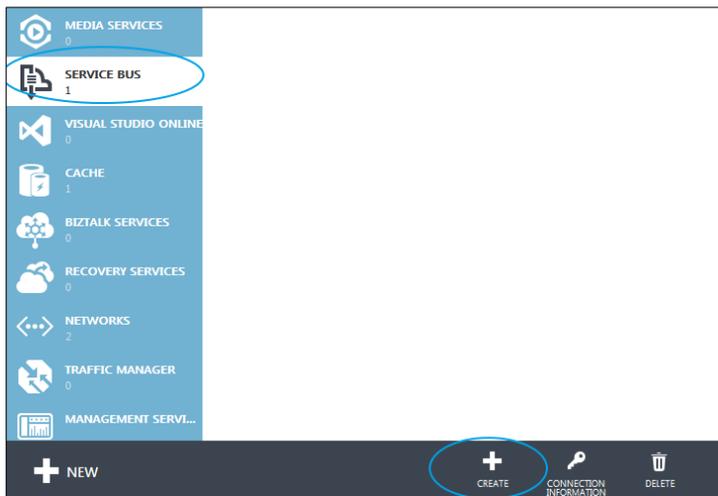
2 Push Notifications

2.1 Windows Azure/Azure Push Direct Notification Hub

2.1.1 Notification Hub Configuration

This section describes how to create and configure a Notification Hub on the Windows Azure portal. Please follow the steps below:

1. On your web browser, log onto the Windows Azure portal (<https://manage.windowsazure.com>).
2. Once you have successfully logged into the portal, go to the Service Bus tab, and click Create as shown below:



2.2 Push Notification for Windows Phone

This section describes how to deploy the RPI Windows Phone Push Notification Demo App onto a device.

PC Pre-requisites

1. Windows Phone Software Development Kits (SDK) 8.0
2. Microsoft Visual Studio 2013
3. Latest Microsoft Visual Studio 2013 updates

PC Pre- requisite Installation

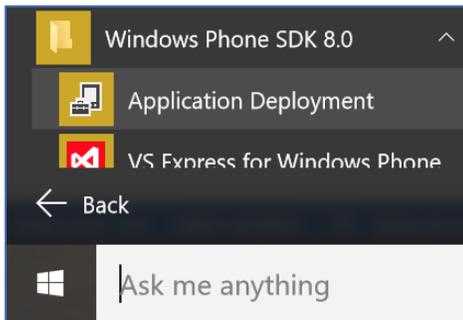
1. Install the Windows Phone Software Development Kit (SDK) 8.0. The installer can be downloaded at <https://www.microsoft.com/en-ph/download/details.aspx?id=35471>. Follow the installation instructions provided.
2. Install Microsoft Visual Studio 2013 and its latest updates.

2.2.1 RPI Windows Phone Push Notification Demo App Deployment

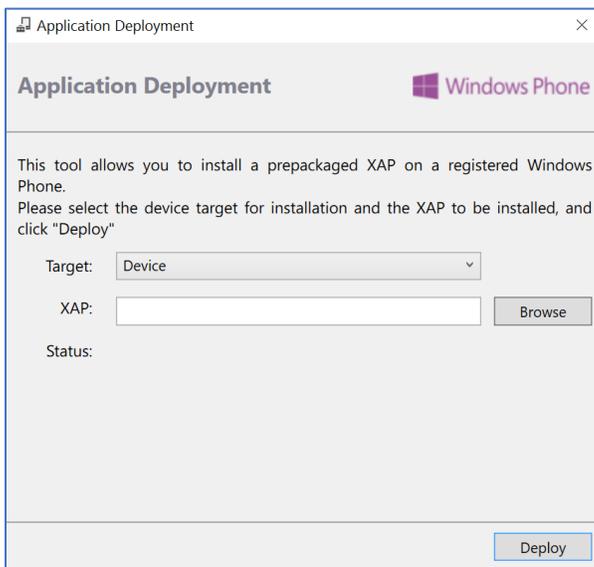
The following steps show how deploy the RPI Windows Phone Push Notification Demo App onto a Windows Phone device.

1. Make sure the phone is connected to the PC via a USB cable.

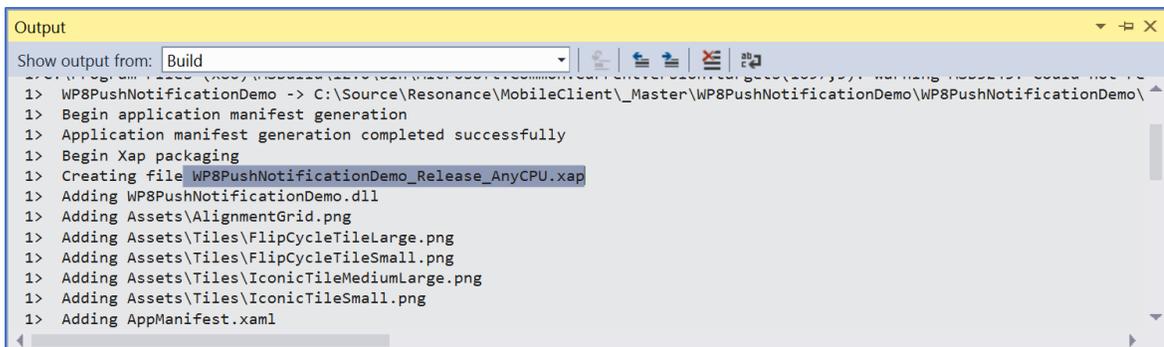
2. Run the Windows Phone SDK Application Deployment application (**Windows > All Programs > Windows Phone SDK 8.0**).



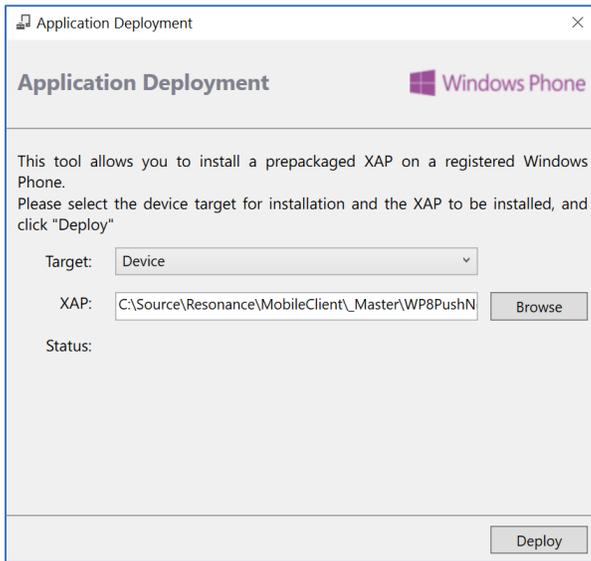
3. Ensure Target is set to Windows Phone Device.



4. Run Microsoft Visual Studio and build the RPI Windows Phone Push Notification Demo App solution from `C:\Source\Resonance\MobileClient_Master\WP8PushNotificationDemo\WP8PushNotificationDemo.sln`. Once successfully built, deploy the project: from the Output window, find the generated `.xap` file in `C:\Source\Resonance\MobileClient_Master\WP8PushNotificationDemo\WP8PushNotificationDemo\Bin\Release`



5. Browse for the generate .xap file in the Application Deployment window.

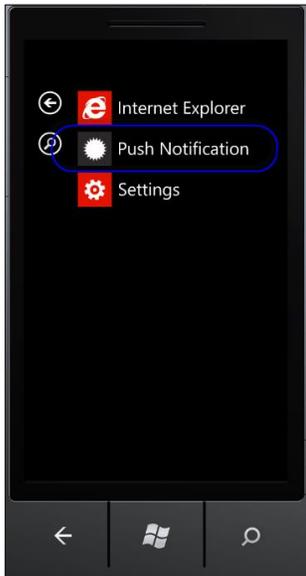


6. Click Deploy. Following successful deployment, the RPI Windows Phone Push Notification Demo App will be installed on the phone.

2.2.2 RPI Windows Phone Push Notification Demo App Configuration

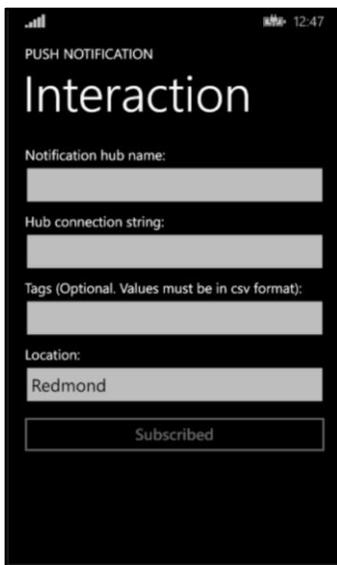
This section describes configuration of the RPI Windows Phone Push Notification Demo App on a Windows phone device, allowing it to receive Push notifications from the Azure Notification Hub.

1. On the Windows phone, tap the Push Notification app.



2. Three text fields and a Subscribe button are displayed.

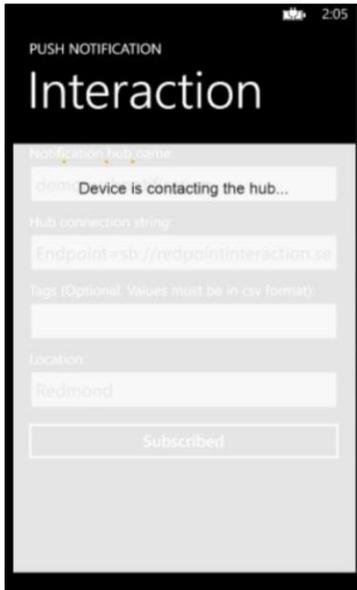
- Notification hub name: name of the notification hub as configured in Windows Azure.
- Hub connection string: used to authenticate the Windows phone against the notification hub. Once authenticated, a secured connection between the device and notification hub is established.
- Tags: optional; used to filter notifications sent to the device. If more than one tag is specified, they should be separated using commas.



3. To test the RPI Windows Phone Push Notification Demo App, enter the following values in the textboxes:

- Notification hub name = demopushnotification
- Hub connection string =
Endpoint=sb://Redpointintera
AccessSignature;SharedAcc
- Provision of Tags is optional.

4. To register the device at the Notification Hub, tap the Subscribe button. The phone will attempt to establish contact with the hub:



5. Once the device has been successfully registered to the Notification Hub, it is now ready to accept notifications.



To unregister from the Notification Hub, tap the Unsubscribe button. Once successfully unregistered, the phone will no longer receive notifications from the Hub.

2.3 Push Notification for Android Phone

This section documents the creation of a Google API project and installation/configuration of the RPI Android Push Notification Demo App.

2.3.1 PC Pre-requisites

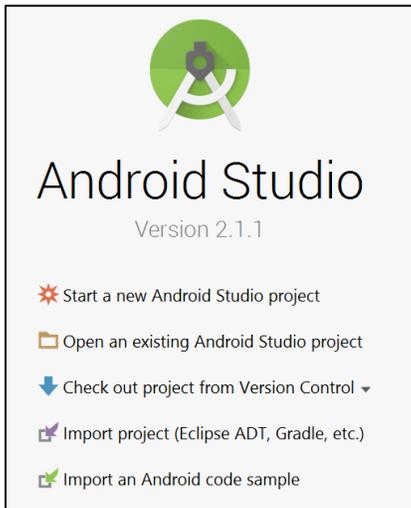
1. AndroidSDK: The Android SDK provides the API libraries and developer tools necessary to build, test, and debug apps for Android (<http://developer.android.com/sdk/index.html>)
2. Latest version of the Android Studio (<https://developer.android.com/studio/index.html>)
3. Java Development Kit(JDK) (<http://www.oracle.com/technetwork/java/javase/downloads/index.html>)

2.3.2 Push Notification Client App Deployment

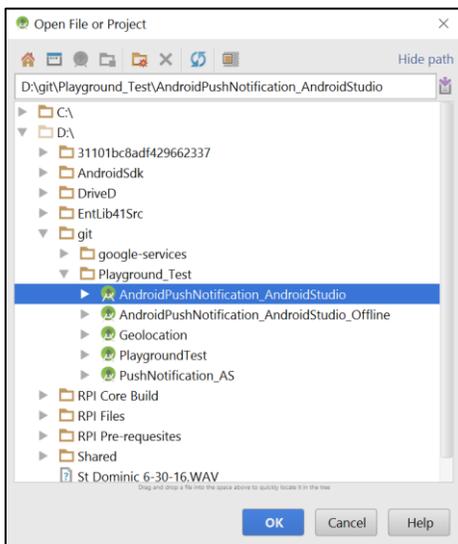
The following steps describe how to deploy the RPI Android Push Notification Demo App.

1. Ensure that an Android phone is connected to your PC.
2. Obtain a copy of the *AndroidPushNotification* source code. Make sure that no files are read-only. You can find the project on Humboldt by browsing TFS path
`$/Resonance/MobileClient/_Master/AndroidPushNotification_AndroidStudio`

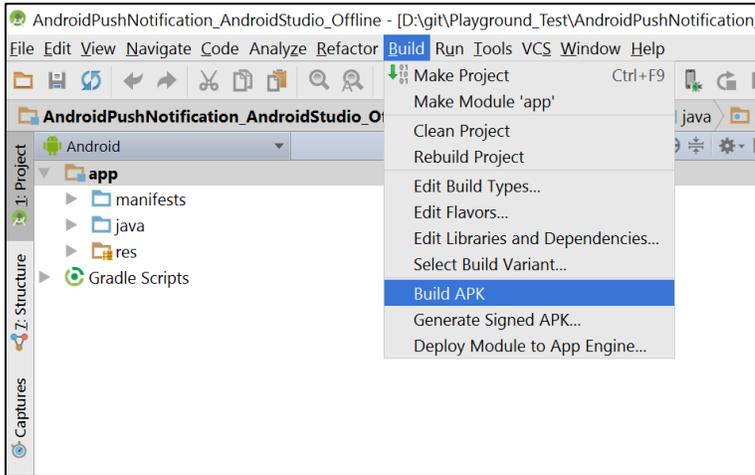
3. Open the Android Studio.



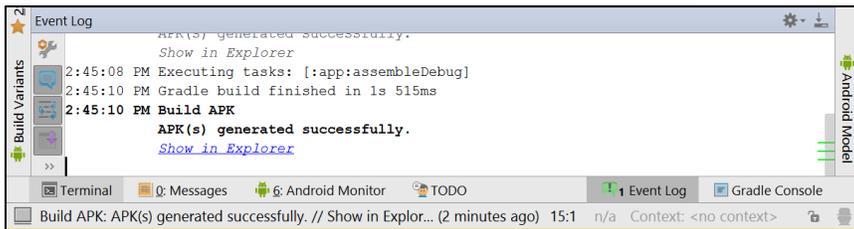
4. Click 'Open an existing Android Studio project' and browse the copy of the *AndroidPushNotification* source code then click 'OK'



5. Once the android project is loaded, click **Build > Build APK**



6. Click Event log.



7. Once the build is completed you can browse the apk by clicking the 'Show in Explorer' link

<input type="checkbox"/>	Name	Date modified	Type
<input type="checkbox"/>	app-debug.apk	7/5/2016 2:42 PM	APK File
<input type="checkbox"/>	app-debug-unaligned.apk	7/5/2016 2:42 PM	APK File

8. Copy and install the *apk* file into your device.

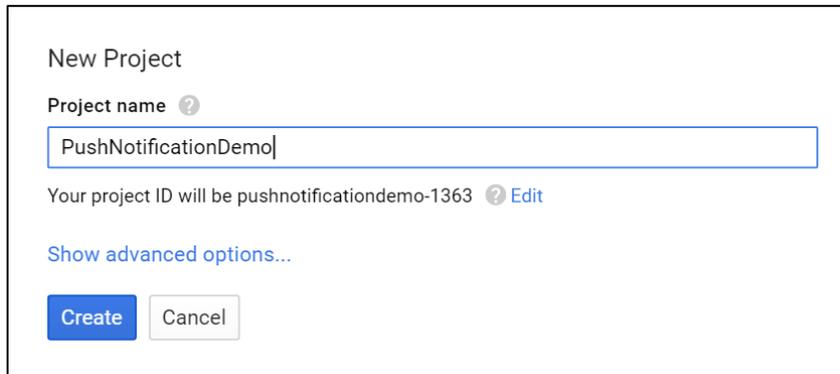
2.3.3 Creating and Setting up a Google API project

This section creates a Google API project and configures Google Cloud Messaging for Android devices for push notification.

After completing these steps, you should have a Sender ID and an API key, which can be used later to configure the RPI Android Push Notification Demo App and Notification Hub.

To create a Google API project, please follow the steps below:

1. Open the Google API Manager page (<https://console.developers.google.com/apis/>).
2. Click Create a project. You will be prompted as shown:



New Project

Project name ?

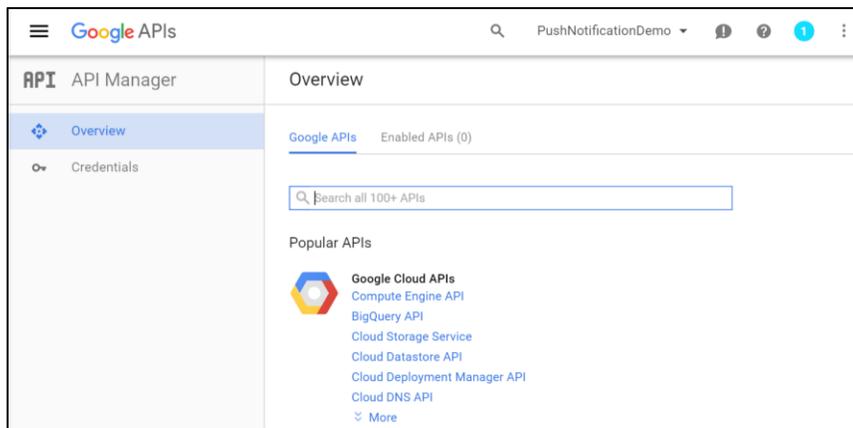
PushNotificationDemo

Your project ID will be pushnotificationdemo-1363 ? Edit

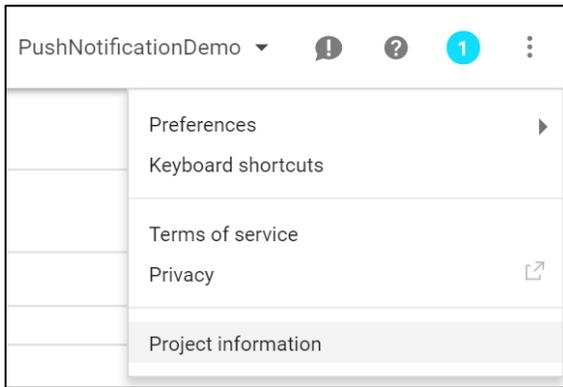
[Show advanced options...](#)

Create Cancel

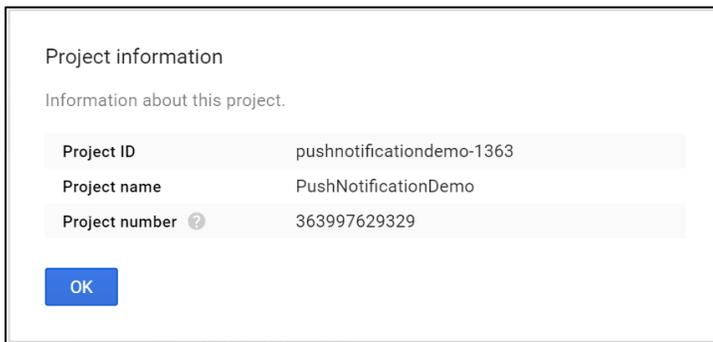
3. Enter a Project name. Click Create and you will be redirected to the newly created project:



4. Click 'Project information'



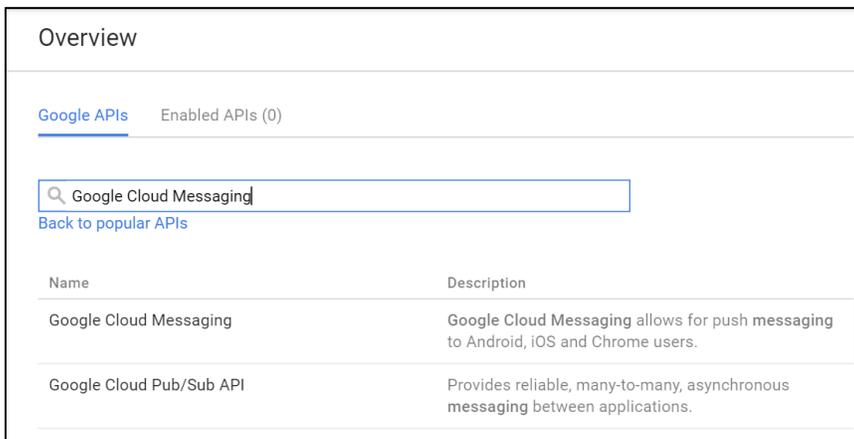
5. Take a note of the Project number (363997629329 in this example) as it will be used later as the Sender ID. Then click OK



2.3.4 Enabling the Google Cloud Messaging (GCM) Service

To enable the GCM service, please follow the steps below:

1. In the Google API Manager page, select the previously created project (*PushNotificationDemo* in the worked example).
2. On the overview page, search for 'Google Cloud Messaging'



3. Select 'Google Cloud Messaging', then click Enable button.

Overview

← Enable

Google Cloud Messaging

Google Cloud Messaging allows for push messaging to Android, iOS and Chrome users.
[Learn more](#)

Using credentials with this API

Using an API key
 To use this API you need an API key. An API key identifies your project to check quotas and access. Go to the Credentials page to get an API key. You'll need a key for each platform, such as Web, Android, and iOS.
[Learn more](#)



Your application API key

2.3.5 Obtaining an API Key

1. To obtain an API key, in the Google API Manager page, select the previously created project (*PushNotificationDemo* in the worked example).
2. Click 'Credentials' then 'Create credentials'

Credentials

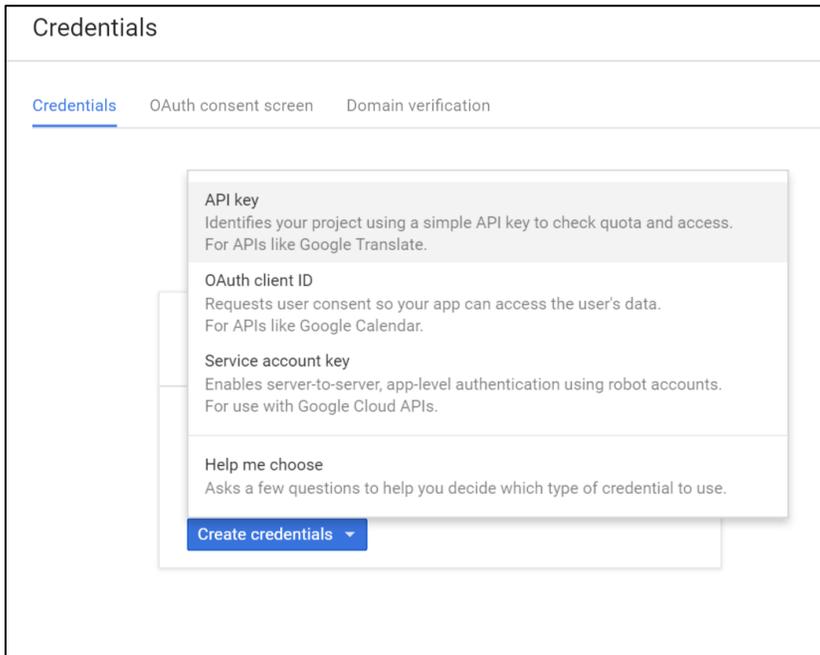
[Credentials](#) OAuth consent screen Domain verification

APIs
Credentials

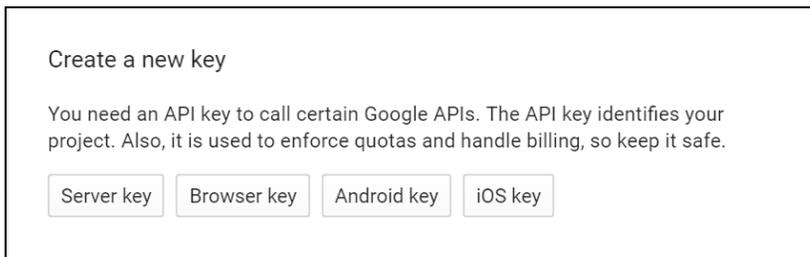
You need credentials to access APIs. [Enable the APIs you plan to use](#) and then create the credentials they require. Depending on the API, you need an API key, a service account, or an OAuth 2.0 client ID. [Refer to the API documentation](#) for details.

[Create credentials](#) ▾

3. Create credentials using 'API key'



4. Select server key



5. Enter a name for the server key and click Create

Credentials



Create server API key

This key should be kept secret on your server
Every API request is generated by software running on a machine that you control. Per-user limits will be enforced using the address found in each request's `userIp` parameter, if specified. If the `userIp` parameter is missing, your machine's IP address will be used instead. [Learn more](#)

Name

Accept requests from these server IP addresses (Optional)
Examples: 192.168.0.1, 172.16.0.0/12, 2001:db8::1 or 2001:db8::/64

Note: It may take up to 5 minutes for settings to take effect

6. Your new API key will be shown in a prompt. Use this as the GCM key to configure the Windows Azure Notification Hub.

API key

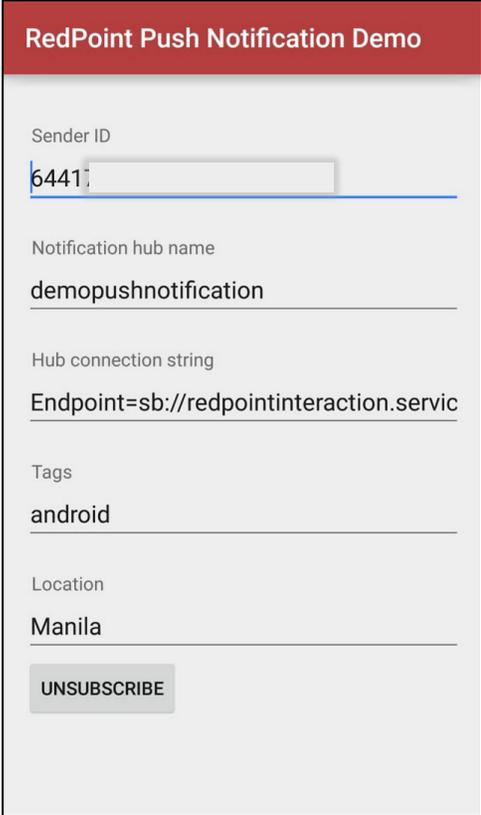
Here is your API key

2.3.6 Android Phone Configuration

Configuration of the RPI Android Push Notification Demo App assumes successful prior configuration of the Windows Azure Notification Hub.

Please follow these steps:

1. Open the installed RPI Android Push Notification Demo App.
2. Configure properties as follows:
 - Set Sender ID to the Project Number recorded when creating the Google API Project.
 - Provide the Notification Hub name.
 - Set the Hub connection string.
3. Click Subscribe to register the application for Push notifications.
4. Click Unsubscribe to opt out of the receipt of messages from the Notification Hub.



The screenshot shows the configuration screen for the RedPoint Push Notification Demo app. The title bar is red with the text "RedPoint Push Notification Demo". Below the title bar, there are several input fields with labels and values:

- Sender ID: 6441
- Notification hub name: demopushnotification
- Hub connection string: Endpoint=sb://redpointinteraction.servic
- Tags: android
- Location: Manila

At the bottom of the form, there is a button labeled "UNSUBSCRIBE".

2.4 Push Notification for iOS Phone

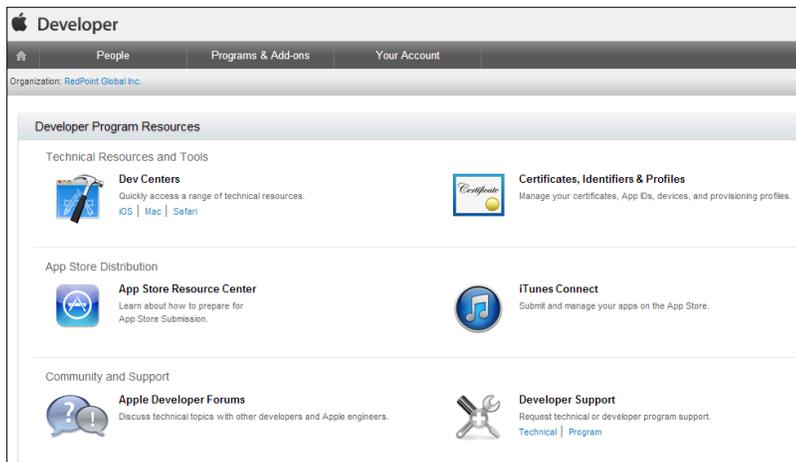
This section documents the creation of an iOS project and configuration of an Apple Push Notification Service (APNS).

2.4.1 Mac Pre-requisites

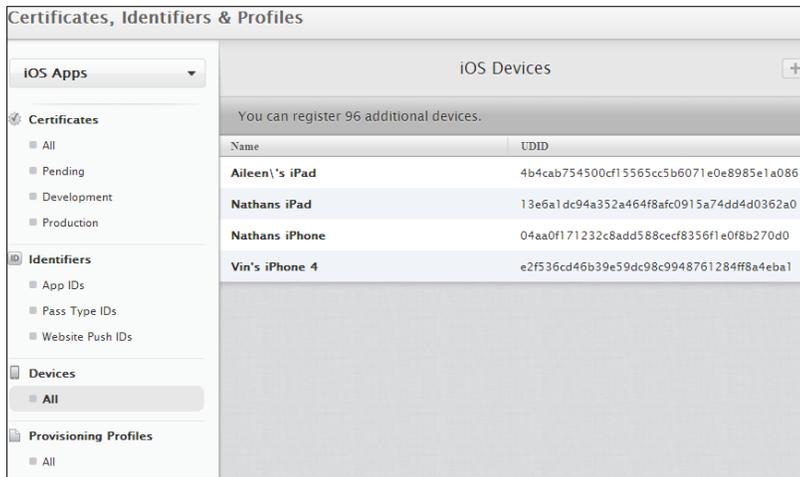
1. xCode 4 interface builder
2. Mac OS X

2.4.2 RPI iOS Push Notification Demo App Deployment

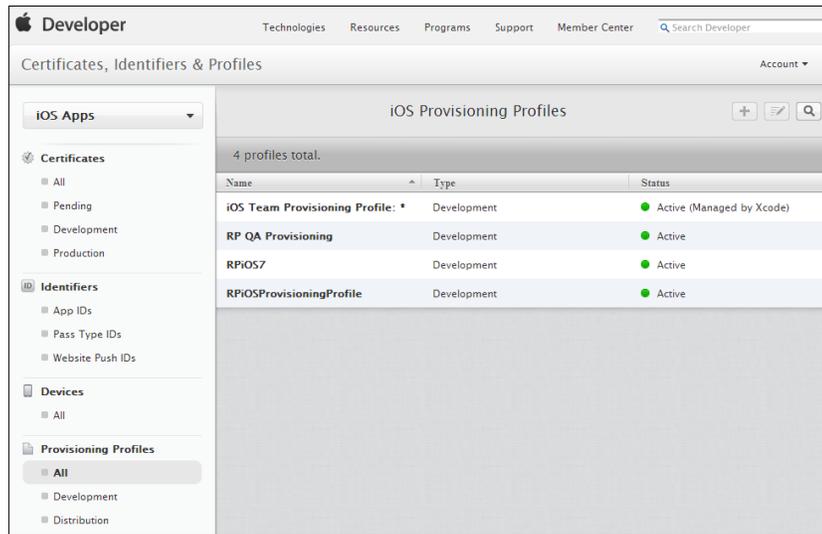
1. Ensure the iOS phone is registered on Apple's developer site.
 - Log on to developer.apple.com and go to Member Center > Certificates Identifiers & Profiles.



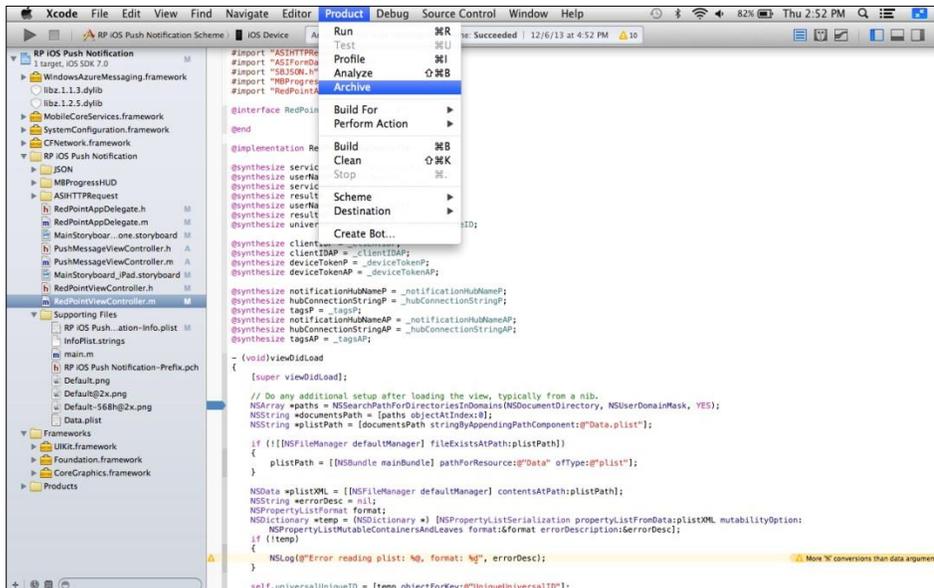
- Register the device's UID:



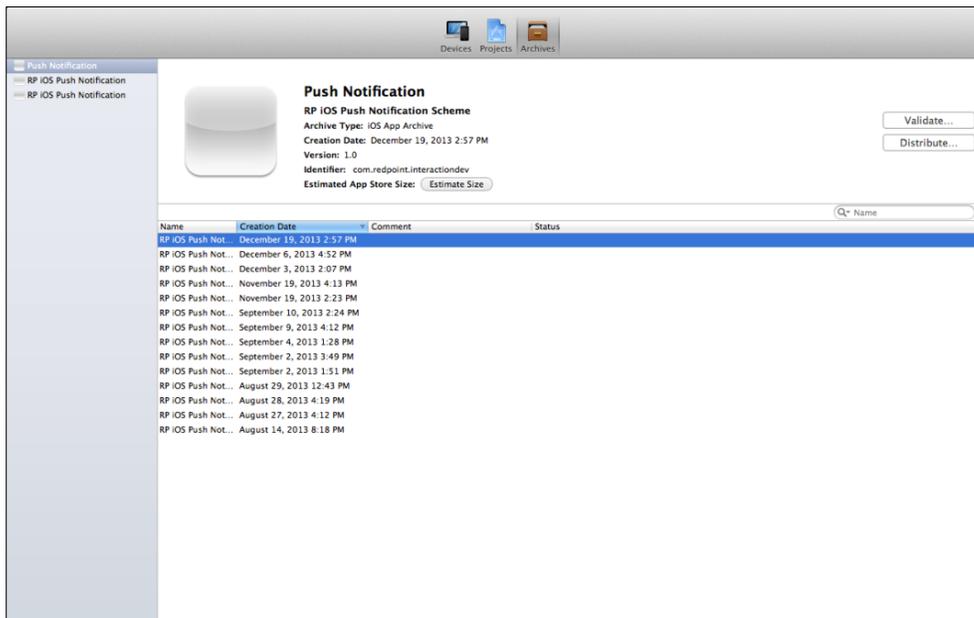
- Create a provisioning profile:



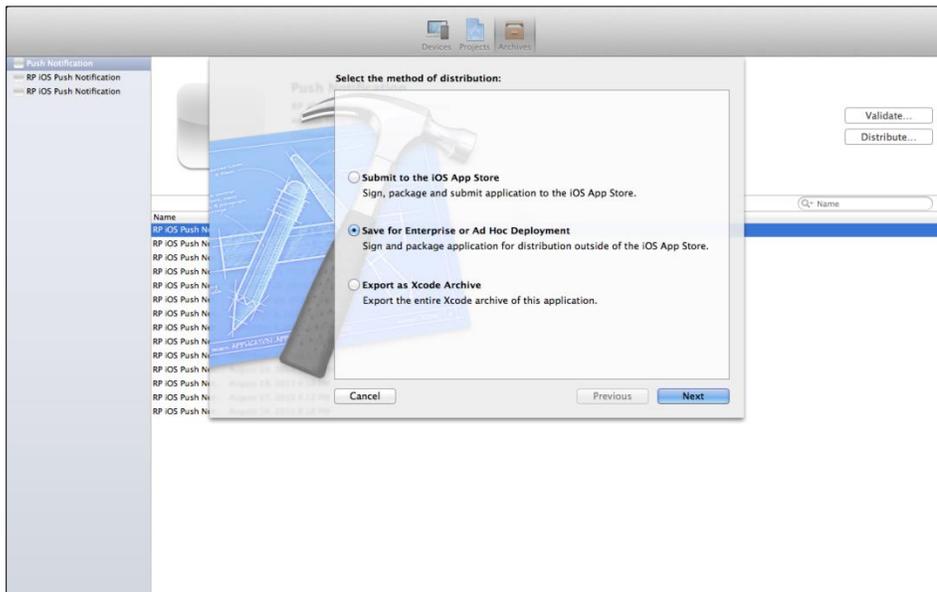
2. In the xCode interface builder, open your XCode project by clicking Product > Archive menu. The project can be found at `$/Resonance/MobileClient/_Master/iOSPushNotification`



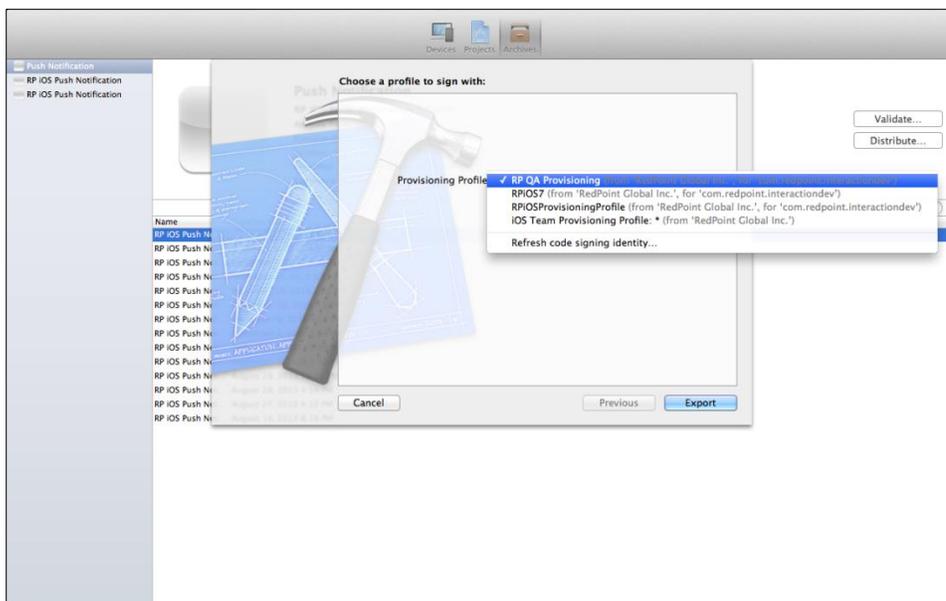
- XCode will build and archive your project. Once done, it will open the Archive window. Select your archive from the list and click Distribute.



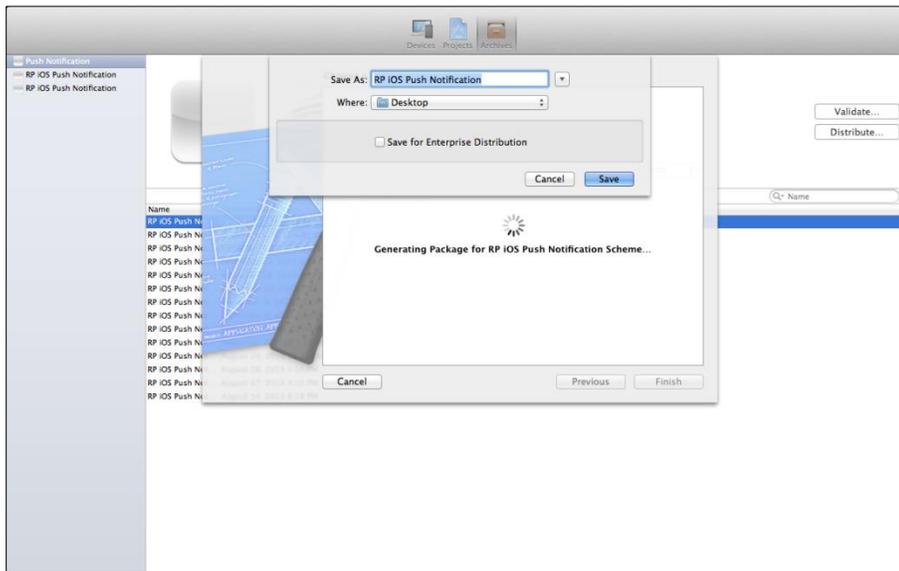
4. Choose "Save for Enterprise or Ad Hoc Deployment" from the methods of distribution.



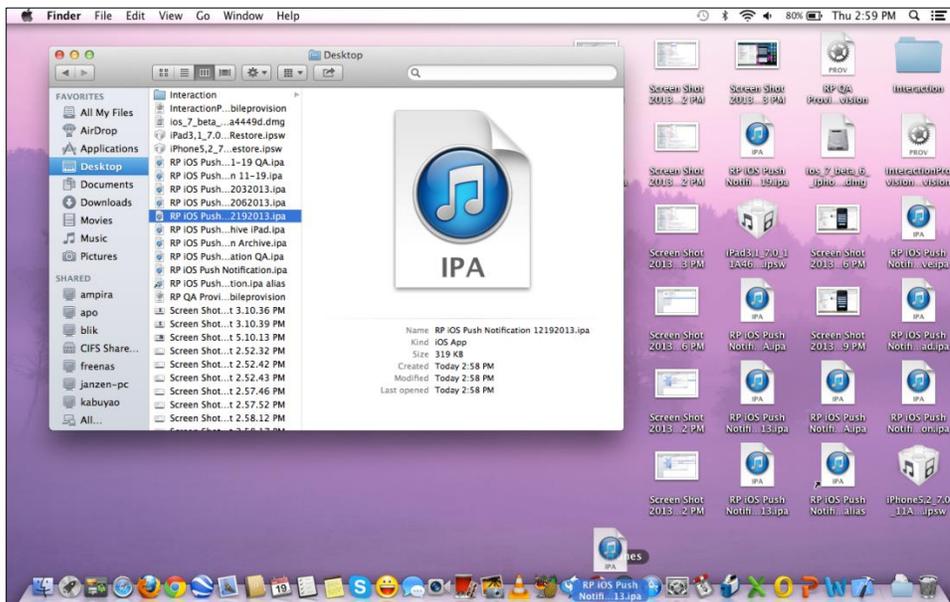
5. Select the appropriate provisioning profile.



6. Save to the destination folder.



7. Go to the folder where the ipa file was saved. Click and drag the file to the iTunes application. If the same application has been added to iTunes already, a prompt to replace the app will appear. Choose "Replace".



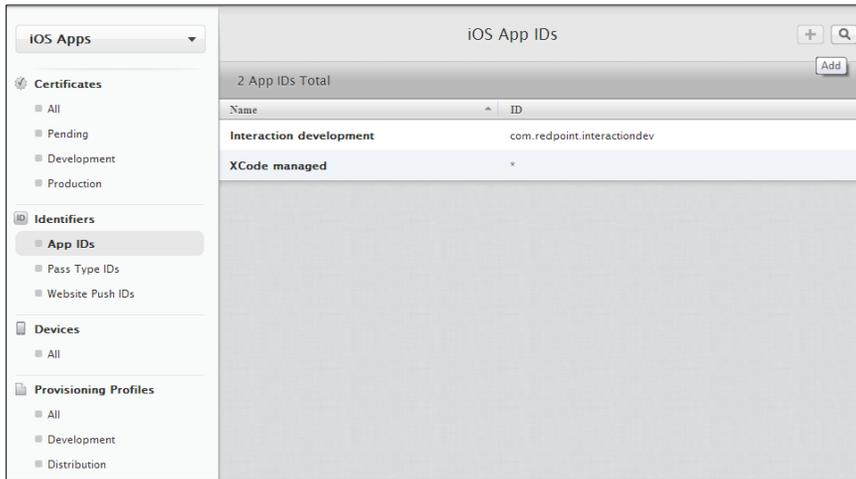
8. Plug the phone into the Mac and open iTunes. Click the device on the sidebar and go to Apps. Locate the app in the list (Push Notification in the image) and make sure the button says, "Will Install". If it says "Install", click the button. Sync the device in iTunes and the app will be installed on the phone.



2.4.3 Creating and Setting Up an iOS project

After completing these steps, you should have a Sender ID and an API key, which you can use later to configure your application and Notification Hub. To create an iOS project please follow the steps below:

1. Login to your account in Apple Developer <http://developer.apple.com>.
2. Go to **Member Center > Certificates, Identifiers & Profiles**. Click on **App IDs** under Identifiers and click the **Add (+)** button.
3. Fill in the required information to create a new App ID:



1. Click on Devices and click the **Add (+)** button. Enter the ID of the phone that will be used to test the RPI iOS Push Notification Demo App.
2. Click All under Certificates. Create a new certificate by clicking the **Add (+)** button. Choose the type of certificate according to the app's requirements.



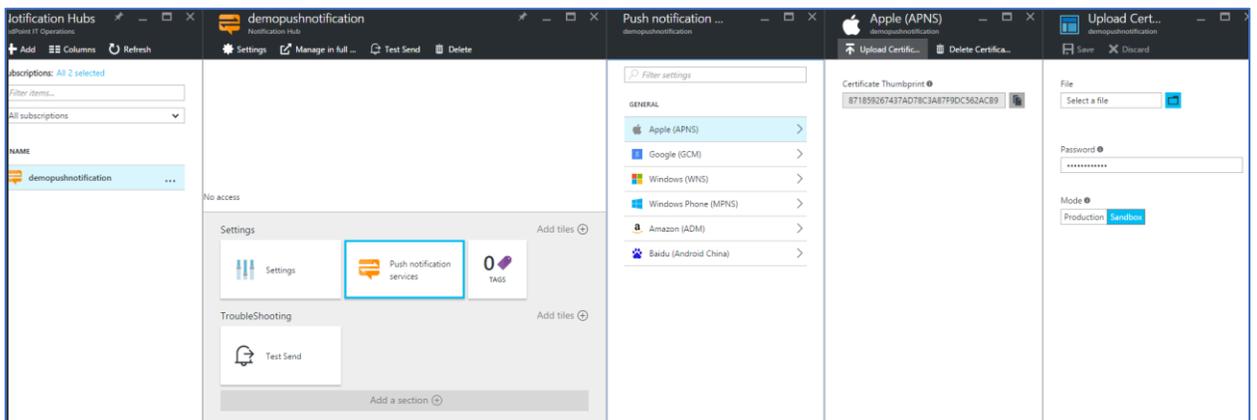
- Once the certificate is created, download the file.



2.4.4 Utilizing the Certificate on Windows Azure

Using the certificate created in the previous section, configure the Windows Azure Notification Hub:

- Log in to your Windows Azure account at <http://portal.azure.com>. Go to **Service Bus** and navigate to the desired notification hub.
- Click on More Services then Notification Hubs. Select your notification hub from the list. Click Push Notification then Apple (APNS). Under the Apple (APNS), click on Upload Certificate and locate the certificate downloaded in the previous section.



2.4.5 RPI iOS Push Notification Demo App Configuration

To configure the RPI iOS Push Notification Demo App, please follow these instructions:

1. Install and open the RPI iOS Push Notification Demo App.
2. Set the Notification Hub Name to Redpoint-notification-hub.
3. Set the Hub connection string to `Endpoint=sb://Redpointinteraction-ns.servicebus.windows.net;/SharedAccessKeyName=DefaultListenSharedAccessSignature;SharedAccessKey=rdDtlcNxsIufTxGEy2Vg8VQSDAbJ1k0d5Ps2ExxtJ9l=).`
4. Set optional Tags to subscribe to specific sets of notifications.
5. Click Subscribe to register the application for push notification.
6. Click Unsubscribe if you do not wish to receive any further messages from the Notification Hub.

Interaction

Notification Hub Name:

Hub Connection String:

Tags:

[Subscribe](#) [Unsubscribe](#)

3. In the Create a Namespace popup dialog box, enter a namespace name and select your appropriate region as depicted below. Click OK.

CREATE A NAMESPACE

Add a new namespace

NAMESPACE NAME

RedPointInteraction ✓
.servicebus.windows.net

REGION

East Asia

4. Once the namespace has been successfully created, you will see it appear on the list of namespaces as shown below. Double click the '[Name]-ns' namespace.

NAMESPACE NAME	STATUS	LOCATION	SUBSCRIPTION	CREATED DATE
RedPointInteraction-ns	Active	East Asia	Pay-As-You-Go	9/13/2013 12:57:58 PM

5. In the '[Name]-ns' namespace configuration page, select the Notification Hubs tab.

redpointinteraction-ns

ALL QUEUES TOPICS RELAYS **NOTIFICATION HUBS** CONFIGURE

NAME	STATUS	SUBSCRIPTION
------	--------	--------------

6. Click New > Service Bus > Notification Hub > Quick Create to create a new Notification Hub.

NEW

MEDIA SERVICE

SERVICE BUS

VISUAL STUDIO ONLINE PREVIEW

BIZTALK SERVICE

ACTIVE DIRECTORY

QUEUE

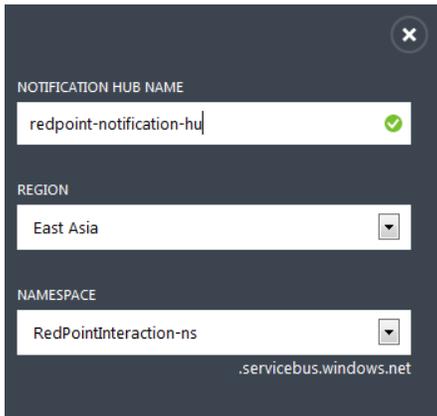
TOPIC

RELAY

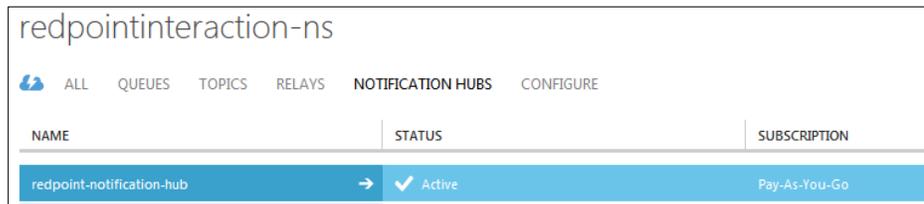
NOTIFICATION HUB

QUICK CREATE

- In the Quick Create panel, enter the Notification Hub Name, select a Region and the earlier Namespace, and click Create a New Notification Hub.

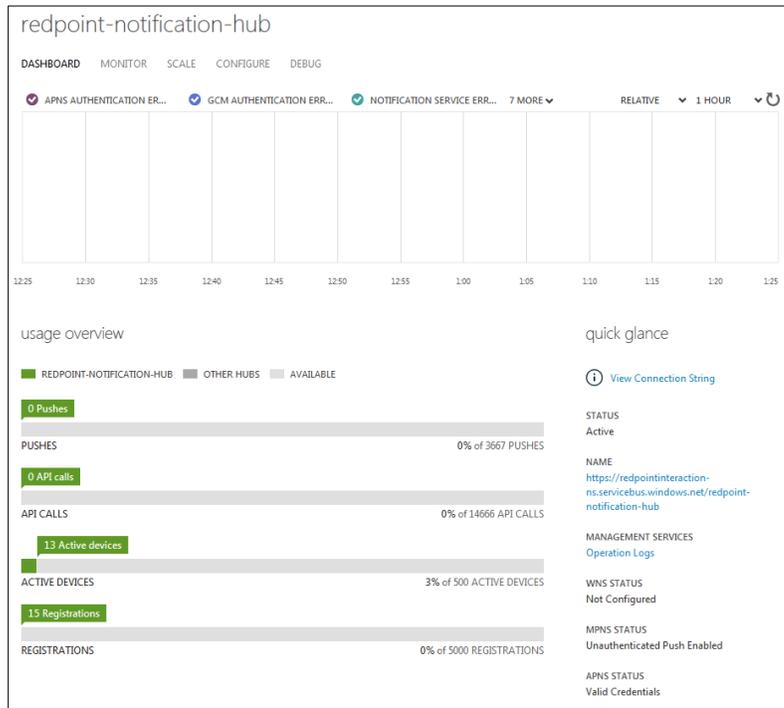


- Once the hub has been successfully created, it will appear in the Notification Hubs list.



NAME	STATUS	SUBSCRIPTION
redpoint-notification-hub	Active	Pay-As-You-Go

- Double click the new hub. The hub's configuration page is displayed.



10. Select the Configure tab, where the following need to be configured:

- Windows phone notification settings (mpns): ensure the Enable unauthenticated push notifications option is checked.
- Apple notification settings (apns): ensure the Apple service certificate thumbprint is uploaded.
- Google Cloud messaging settings (gcm): ensure the Google cloud messaging console GCM API key is provided.

The screenshot displays the 'Configure' tab with three sections:

- windows phone notification settings (mpns)**: Includes a 'CERTIFICATE THUMBPRINT' field with an empty input box, 'Upload' and 'Delete' buttons, and a checked checkbox for 'Enable unauthenticated push notifications'.
- apple notification settings**: Includes a 'CERTIFICATE THUMBPRINT' field with a blue-filled input box, 'Upload' and 'Delete' buttons.
- google cloud messaging settings**: Includes a 'GCM API KEY' field with a blue-filled input box.

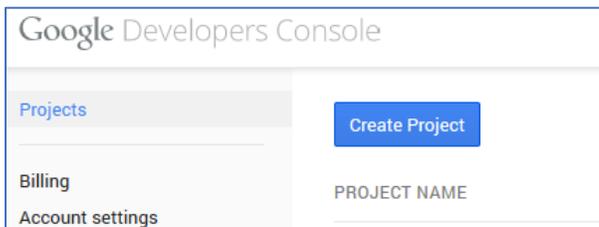
2.5 Google Firebase

This section describes the steps to be taken to use Google Firebase with RPI.

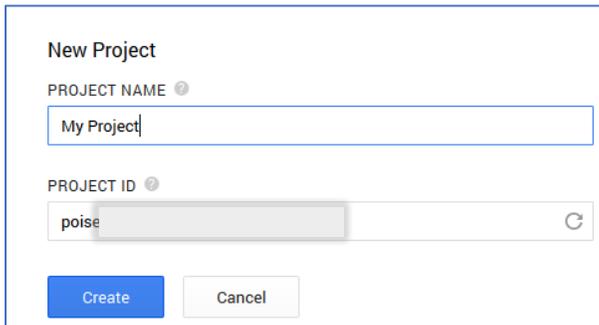
2.5.1 Creating and Configuring a New Google Project

This section describes how to create and configure a new Google project. If you have created one previously, you may skip this section. Otherwise, please follow the steps below:

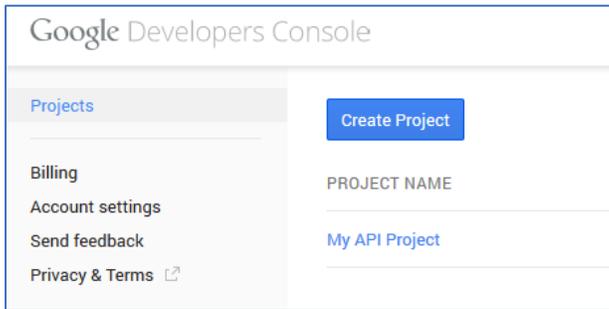
1. In a web browser, log into the Google API console at <https://console.developers.google.com/apis/credentials> using a Gmail account.
2. If this is your first time accessing the Google Developer Console, create a new project by clicking on the Create Project button. If not, skip this step.



3. Enter the name of the project and click Create button. Leave the default Project ID value.

A screenshot of the 'New Project' dialog box. It has a title 'New Project'. Below the title, there are two input fields. The first is labeled 'PROJECT NAME' and contains the text 'My Project'. The second is labeled 'PROJECT ID' and contains the text 'poise'. At the bottom of the dialog, there are two buttons: 'Create' (in blue) and 'Cancel' (in grey).

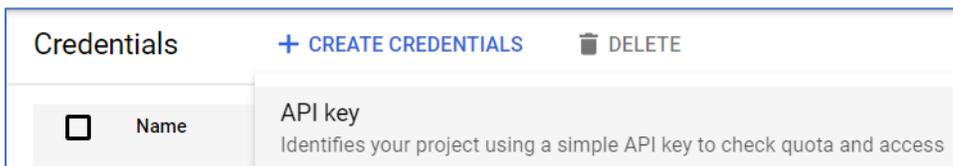
4. Having successfully created the project, double-click the project name.



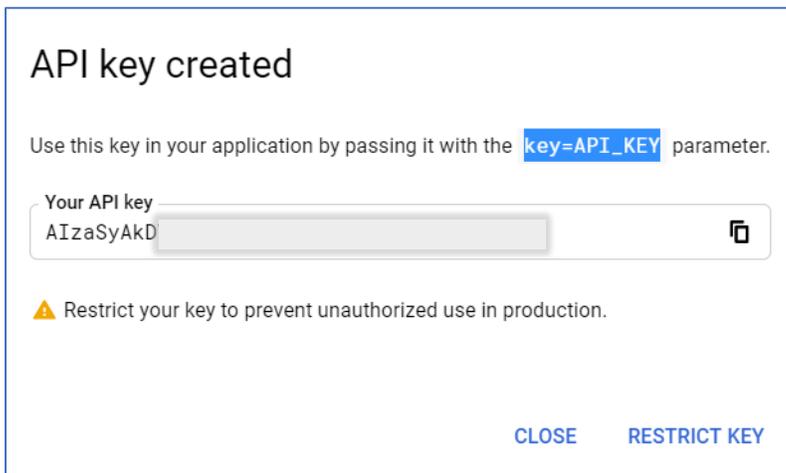
2.5.2 Enabling Google Firebase Cloud Messaging API Key

This section describes how to enable a Google Firebase Cloud Messaging API Key. Please follow the steps below:

1. Go to your Google Project's dashboard by navigating to API & Services > Credentials.
2. In the Credentials page, click Create Credentials and select API key.



3. The API key having been created; you are given the option to restrict it.



4. Click Restrict Key. You will be provided with options as to which restrictions are to be applied.
5. Make sure that 'None' is selected at Application restrictions.
6. At API restrictions, select 'Don't restrict key', or select 'Cloud Messaging' at the Restrict key dropdown.

← Restrict and rename API key REGENERATE KEY DELETE

Key restrictions

⚠ This key is unrestricted. Restrictions help prevent unauthorized use and quota theft. [Learn more](#)

Application restrictions

An application restriction controls which websites, IP addresses, or applications can use your API key. You can set one application restriction per key.

None

HTTP referrers (web sites)

IP addresses (web servers, cron jobs, etc.)

Android apps

iOS apps

API restrictions

API restrictions specify the enabled APIs that this key can call

Don't restrict key
This key can call any API

Restrict key

Type to filter

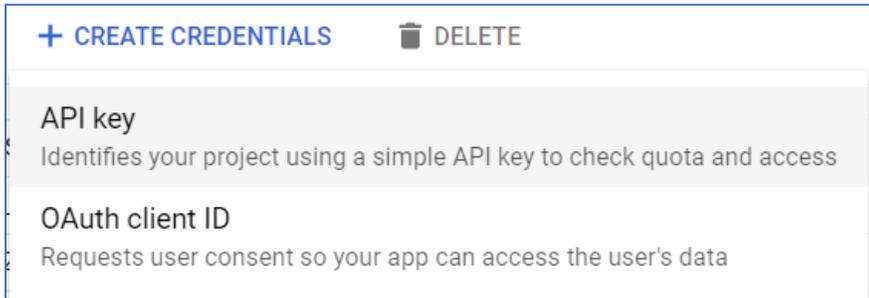
- Cloud Deployment Manager V2 API
- Cloud Firestore API
- Cloud Functions API
- Cloud Identity-Aware Proxy API
- Cloud Messaging
- Cloud OS Login API
- Cloud Pub/Sub API
- Cloud Resource Manager API

7. Click Save for the changes to take effect.

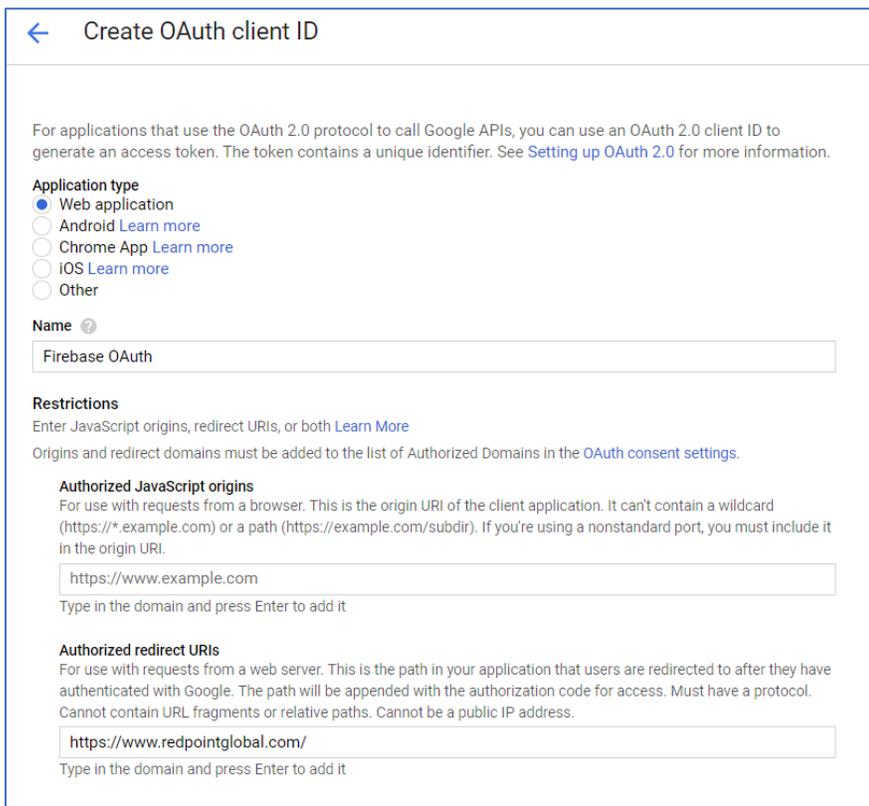
2.5.3 Provisioning an OAuth Client ID

This section describes how to provision a new Google Firebase OAuth Client ID.

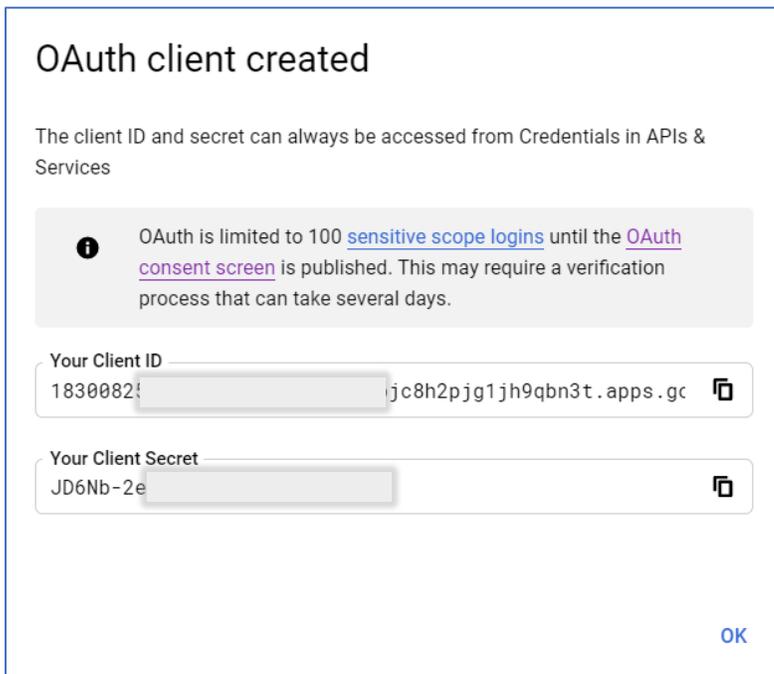
1. At the Credentials page, click Create Credentials and select OAuth client ID.



2. Choose "Web Application" as the application type. Set an authorized redirect URI. This will be used at the Google Firebase channel configuration.

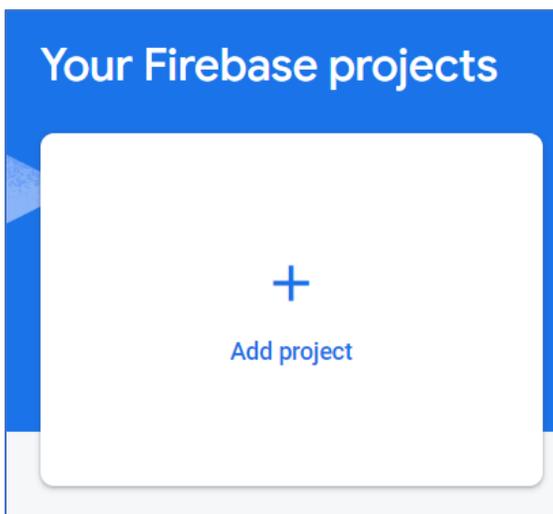
A screenshot of the 'Create OAuth client ID' form in the Google Cloud console. The page title is 'Create OAuth client ID' with a back arrow. Below the title is a paragraph explaining that OAuth 2.0 client IDs are used to generate access tokens. The 'Application type' section has radio buttons for 'Web application' (selected), 'Android', 'Chrome App', 'iOS', and 'Other'. The 'Name' field contains 'Firebase OAuth'. The 'Restrictions' section includes instructions on adding origins and redirect domains. Under 'Authorized JavaScript origins', there is a text input field containing 'https://www.example.com'. Under 'Authorized redirect URIs', there is a text input field containing 'https://www.redpointglobal.com/'.

3. Save your Client ID and Client Secret. These will be used when configuring a channel.

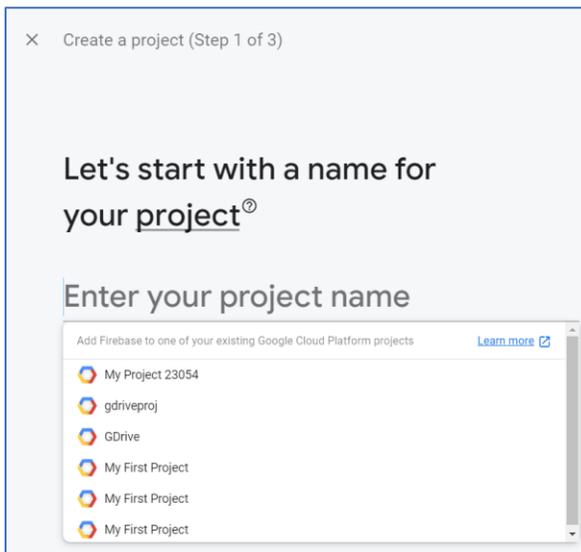


2.5.4 Provisioning a Google Firebase Cloud Messaging Project

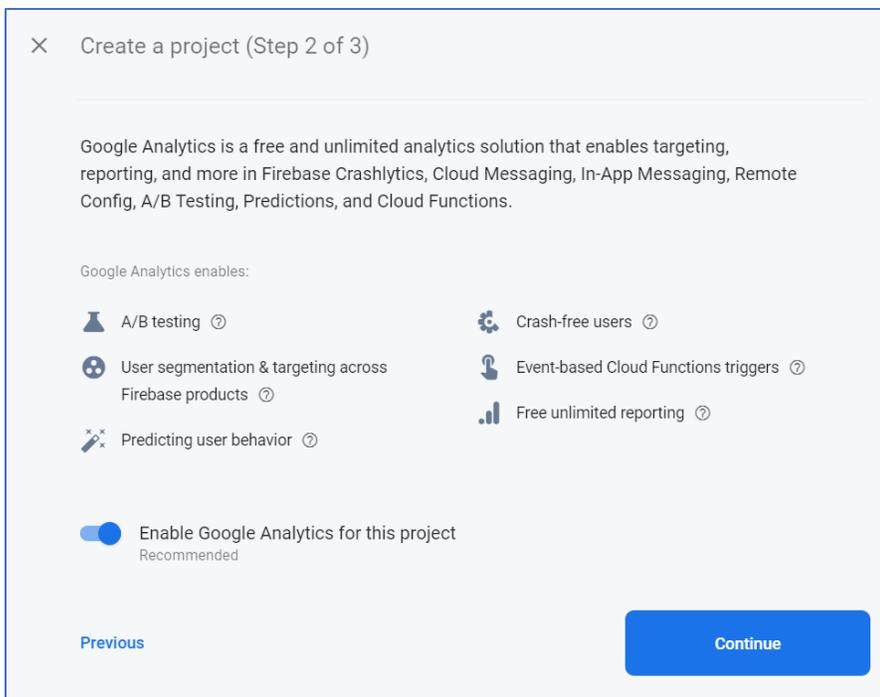
1. In a web browser, navigate to <https://console.firebase.google.com/u/0/> and log into the Google Firebase console page.
2. Click Add project.



3. Enter the project's name.



4. Click Continue at step 2.



5. Select an account at step 3.

× Create a project (Step 3 of 3)

Configure Google Analytics

Choose or create a Google Analytics account ⓘ

 Default Account for Firebase ▾

Upon project creation, a new Google Analytics property will be created in your chosen Google Analytics account and linked to your Firebase project. This link will enable data flow between the products. Data exported from your Google Analytics property into Firebase is subject to the [Firebase terms of service](#), while Firebase data imported into Google Analytics is subject to the [Google Analytics terms of service](#). [Learn more](#).

[Previous](#) [Create project](#)

6. After your Firebase project has been created, you must add your app (e.g., iOS, Android) in it. For detailed and accurate steps, please see the following:

iOS - <https://firebase.google.com/docs/ios/setup>

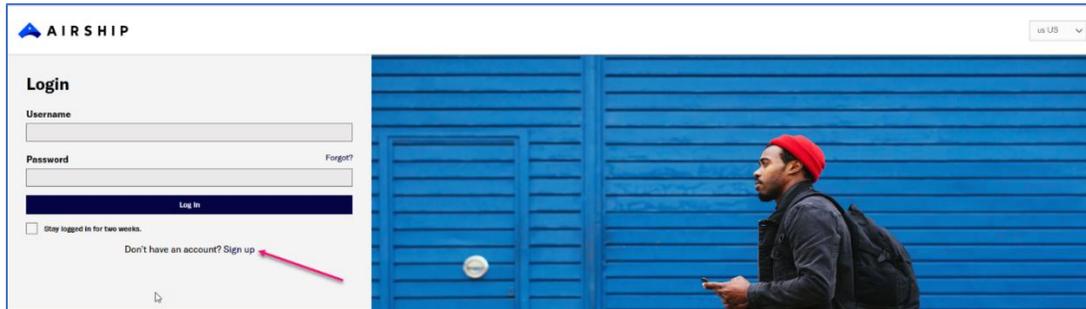
Android - <https://firebase.google.com/docs/android/setup>

2.6 Airship Push Direct Notification Configuration

2.6.1 Creating a Project

This section describes how to create and configure Airship on Android Mobile and iOS Mobile. Please follow the steps below:

1. In a web browser, navigate to <https://go.airship.com/> and click on Don't have an account? Sign Up.



2. Fill out the required details and click the Create account button.

3. Check your email to verify account and click the link.
4. Fill out the required fields to Create Password.

Create password

Passwords must be 8 characters, including one number and one special character.

Password

Confirm password

Create password ←

- The New Project set up screen displayed. To get started, click Create a project.

Get started
Create a project, add configuration for channels and start sending messages. Create a project

Try demo
Download the 1st Flight demo app and try out features. [Learn more](#) Download the app

Grow audience
Start growing your audience on the **Orchestration Edition** with access to Journeys and In-App Messaging. Manage your plan

- Enter your project's details and click Create project.

New Project

A container for messaging engagement and channel configuration.

Project name
An identifier for referencing your project.

Icon
Add a visual marker to help you find project (optional).

 Browse...

Live / Test
Cannot be changed later.

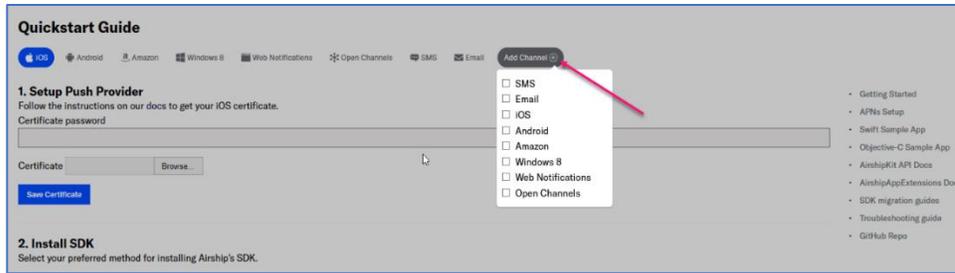
Test: Use to send messages to your test audience. ▼

Industry
Select an industry type and sub-industry.

Choose Industry ▼

Create project OR cancel

- Click Add Channel and select the channels you want your project to support.



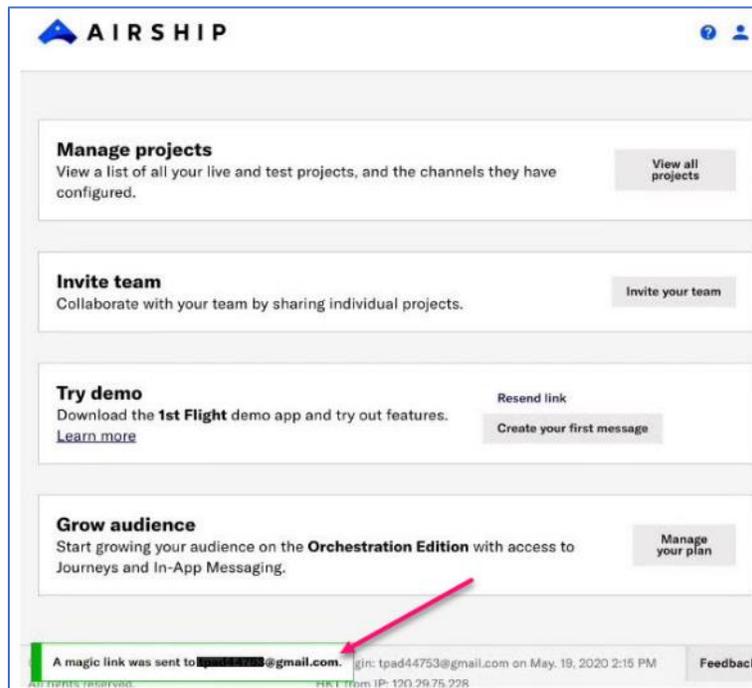
8. To get an App Key and Master Secret follow these steps:

- Click 1st Flight Demo
- Go to Settings » APIs & Integrations » Airship API.

2.6.2 Android & iOS Phone Configuration

After creating an account to receive push notifications on your mobile devices, please follow these steps:

1. In a web browser, navigate to <https://go.airship.com/> and log into your account.
2. Click Download the app 1st Flight, then enter your email address and click Get Magic Link.
3. From your mobile device, check your Email and tap the message's link to download the app. Your device's app store will open at the Airship app.



- Click Install 1st Flight App and open the app
 - Log into your account using your Airship username and password
 - Click Connect My App
 - For iOS mobile devices, tap Enable Push then Allow to receive push notifications For Android mobile devices push is automatically enabled so this screen will not appear.
4. To get a Named User and Tag, please follow these steps:
 - On your mobile device, click Push Settings » Audience » Named User » Tag
 - Add Named User and Custom Tag
 5. To find a Device Token and Channel ID, please follow these steps:
 - Log into the Airship portal
 - Click 1st Flight App Demo » Audience
 - Click Device Token copy identifiers
 - Click Channel ID copy identifiers

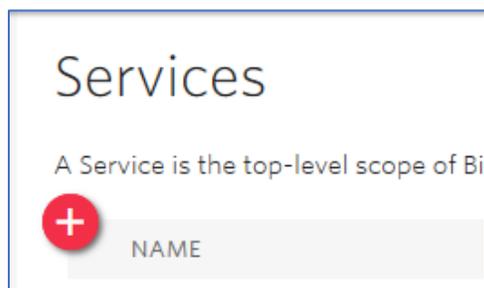
2.7 Twilio Notify

This section describes how to set up a Twilio Notify Service to use the Twilio Notify and Twilio Notify Direct channels in RPI. Please follow the steps below:

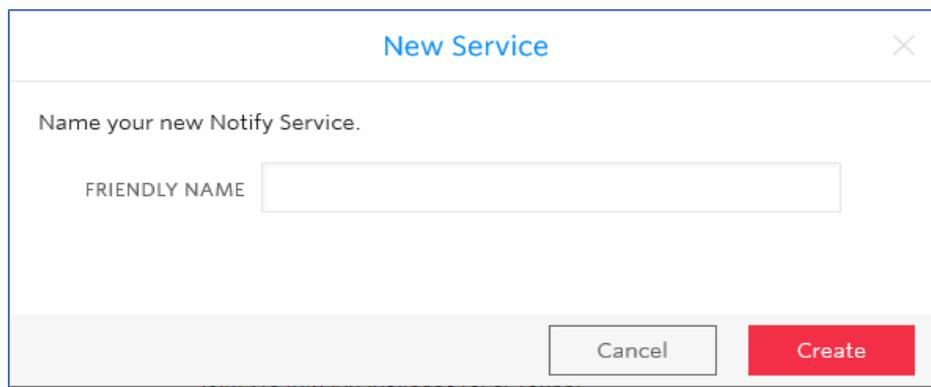
1. In a browser, navigate to <https://www.twilio.com/console/notify/getting-started>. Login to the Twilio portal and go to the Notify Console.



2. Click Services in the menu on the left.
3. Create a new Service by clicking the (+) icon.



4. Type a friendly name for your Notify Service, then click Create.



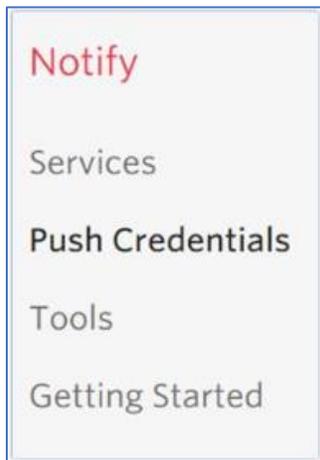
5. The Configure page for your newly created service will be displayed. Assign your chosen push credentials for APN (Apple iOS), GCM (Android), FCM (Android), and/or Messaging Service (SMS).

Configure

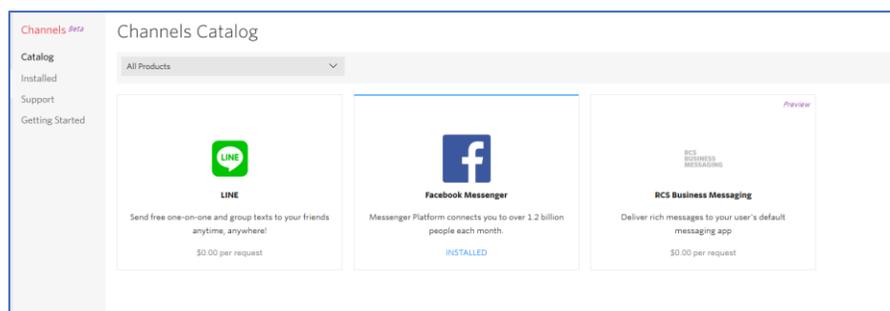
Properties

FRIENDLY NAME	testqa	
SERVICE SID	15c120	
APN CREDENTIAL SID	No value selected	Create an APN Credential here
GCM CREDENTIAL SID	No value selected	Create a GCM Credential here
FCM CREDENTIAL SID	No value selected	Create an FCM Credential here
MESSAGING SERVICE SID	No value selected	Create a Messaging Service here
FACEBOOK MESSENGER PAGE ID	No value selected	Create a Messenger Configuration here

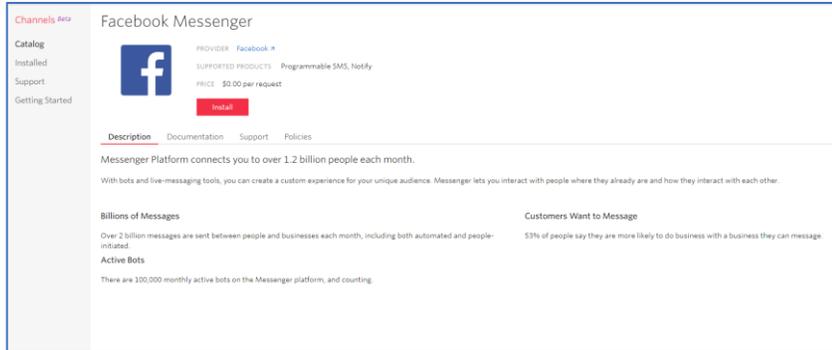
- To create a Push Credential, click any of the links on the Configure page or, in the menu on the left, click Push Credentials.



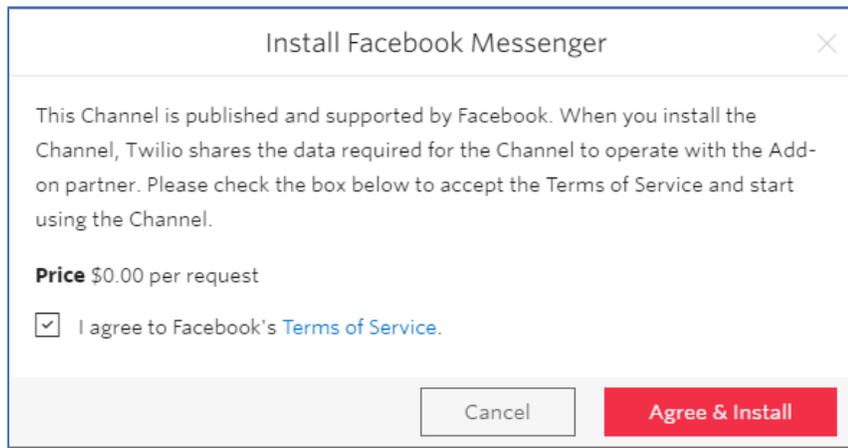
- The New Credential dialog window will appear. Type a friendly name for the Push Credential and select its Type.
 - The GCM Push Credential will require the GCM API key of your Android app.
 - The FCM Push Credential will require the FCM Secret of your Android app.
 - The APN Push Credential will require the certificate key and private key of your Apple app. Check the Sandbox option if the app is not yet deployed to production.
 - The Facebook Messenger Push Credential will require a configured Facebook Messenger channel in Twilio.



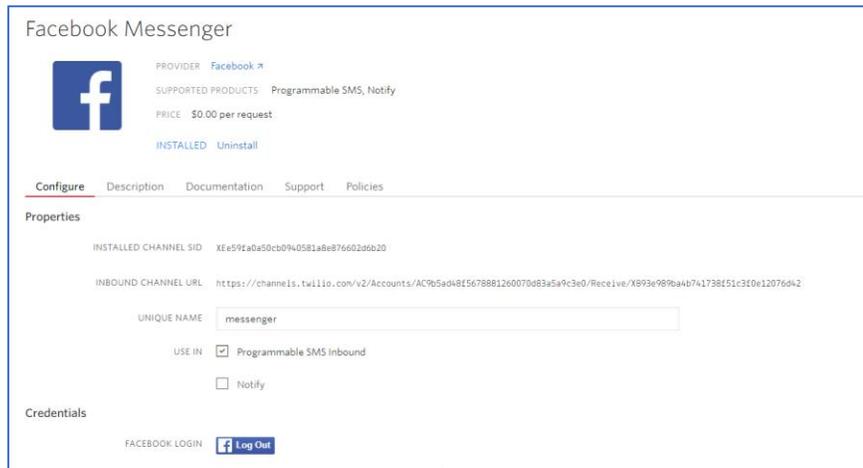
To configure Facebook Messenger, click the option on the Channels Catalog page.



Click the “Install” button. Read and click “Agree” at the Terms of Service after reading.



At Facebook Messenger’s Configure page, specify a unique name. Check the “Notify” checkbox as well.



At “Credentials”, log into your Facebook account using the Log In button, then select the Facebook Page you want associated with Twilio Notify and Facebook Messenger.

Credentials

FACEBOOK LOGIN  Log Out

SELECT A PAGE RPI App Community 

In the “Configuration” section, set any desired callback URL properties.

Configuration

PAGE ID messenger: 345000492596896

PAGE FRIENDLY NAME RPI App Community

CALLBACK URL

CALLBACK METHOD POST 

FALLBACK URL

FALLBACK METHOD POST 

STATUS CALLBACK URL

STATUS CALLBACK METHOD POST 

Save your changes. Successful configuration will be indicated by the green check mark at “Long Lived Token” under “Credentials”.

Credentials

FACEBOOK LOGIN  Log Out

LONG LIVED TOKEN  You're all set!

- In the Configure page, assign the Push Credentials to your Notify Service.

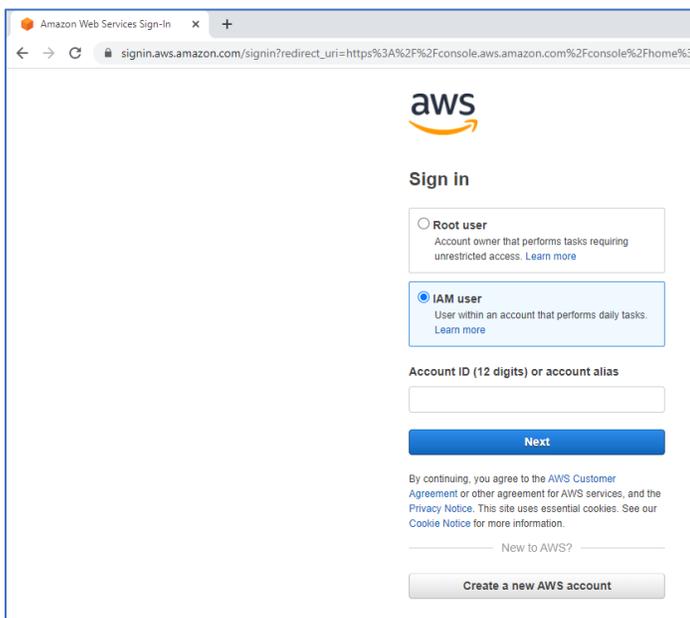
2.8 Amazon Pinpoint Push Notification

2.8.1 Amazon Pinpoint Push Notifications Configuration

This section describes how to create and configure the Amazon Pinpoint Push Notifications project in Amazon Web Services (AWS), with the assumption that an AWS account has already been provisioned.

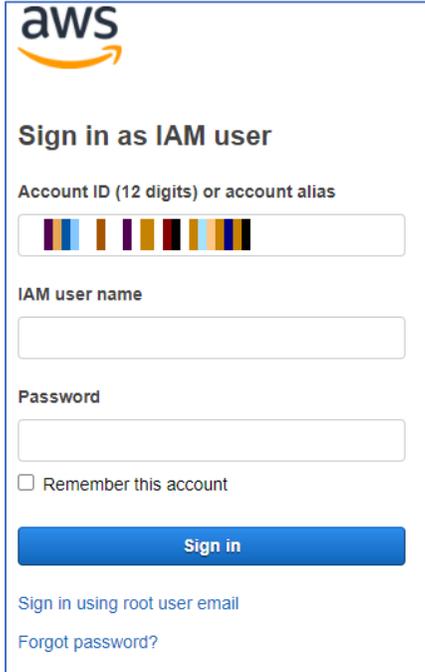
2.8.1.1 Creating new Amazon Pinpoint Push Notifications project

1. Login to the Amazon Web Services management console, by navigating to <https://console.aws.amazon.com/iam/>
2. Select IAM User option and provide your Account ID or Account Alias. Click the “Next” button:



The screenshot shows the Amazon Web Services Sign-In page. The browser address bar indicates the URL is https://signin.aws.amazon.com/signin?redirect_uri=https%3A%2Fconsole.aws.amazon.com%2Fconsole%2Fhome%3F. The page features the AWS logo and a "Sign in" heading. There are two radio button options: "Root user" (which is selected) and "IAM user". Below these options is a text input field labeled "Account ID (12 digits) or account alias". A blue "Next" button is positioned below the input field. At the bottom of the page, there is a link to "Create a new AWS account".

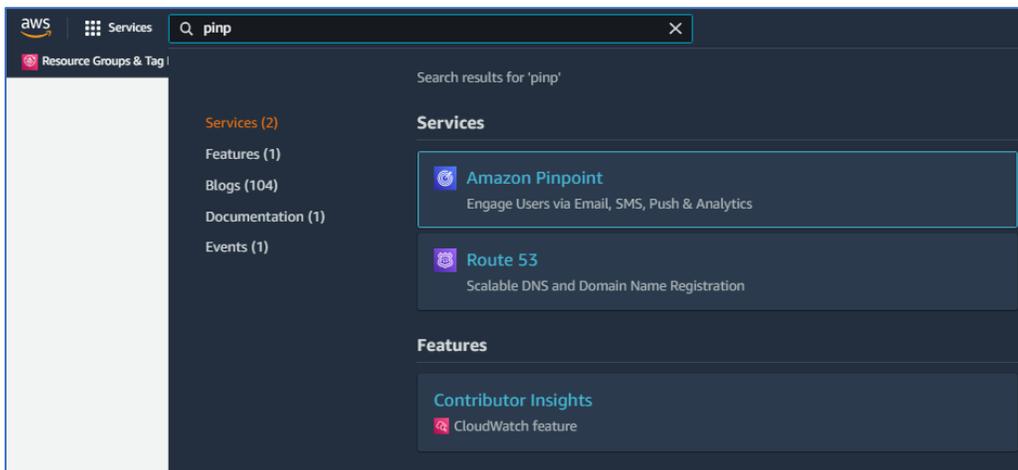
3. Provide your IAM username and password. Click the “Sign in” button.



The image shows the AWS 'Sign in as IAM user' form. At the top left is the AWS logo. Below it is the title 'Sign in as IAM user'. The form contains the following fields and elements:

- Account ID (12 digits) or account alias:** A text input field with a placeholder showing a 12-digit alphanumeric string.
- IAM user name:** A text input field.
- Password:** A text input field.
- Remember this account
- Sign in** button (blue)
- Links: [Sign in using root user email](#) and [Forgot password?](#)

4. Upon successful login to the AWS management console, navigate or search for the Amazon Pinpoint service, and click on the link:



5. Within the Amazon Pinpoint management console, create a new project by entering the project name and then click the “Create a project” button.

Get started

To get started with Amazon Pinpoint, create a project.

Project name

Create a project

6. In the “Configure features” page, click the “Configure” button within the Push Notification tile:

Configure features

Choose a feature to add to your project. You can add more features later.

Project features

Messaging channels and response metrics

Email
Send personalized email messages to your customers. [Info](#)

SMS
Send SMS text messages from shared or reserved phone numbers. [Info](#)

Push notifications
Send push notifications to users of your mobile apps. [Info](#)

Application analytics

Mobile app analytics
Track usage metrics for mobile applications. [Info](#)

Web app analytics
Track usage metrics for web-based applications. [Info](#)

7. Expand Push notifications services and set up each push notification service by providing the required credentials. Once updated, click the “Save” button:

Set up push notifications

Push notifications services

Choose a push notification service to enable, and then provide your credentials for that channel.

Apple Push Notification service (APNs)

Authentication type

Key credentials

Certificate credentials

Firebase Cloud Messaging (FCM)

API key

▼ Show more push notification services

Baidu Cloud Push

Amazon Device Messaging

► **Advanced options - optional**

Cancel **Save**

8. Create the Pinpoint import Segment ARN role by following the steps covered in the documentation provided by AWS in these two links:

https://docs.aws.amazon.com/IAM/latest/UserGuide/id_roles_create_for-service.html

<https://docs.aws.amazon.com/pinpoint/latest/developerguide/permissions-import-segment.html#permissions-import-segment-trustpolicy>

The Pinpoint Segment ARN role name will be used in the Amazon Pinpoint Push Notification channel configuration, under the “Segment role ARN” setting.

Segment role ARN:	<input type="text"/>	Amazon Resource Name (ARN) used to authorize Pinpoint to access Amazon S3 bucket folder
-------------------	----------------------	---

Note: The role must have the necessary permissions to access the Amazon S3 bucket folder that is configured for the channel.

3 Social Configuration

3.1 Facebook

3.1.1 Supported Facebook Connectors

RPI facilitates integration with Facebook in the following contexts:

Connector	Connector Type	Description	Required App Permissions
Facebook	Channels > Social	The Facebook channel allows a user to post messages to a page via a broadcast activity. It will only post to pages that are associated to the user credentials configured in the channel. Events associated with the post, such as number of likes, are sent back to RPI and are made available to report on.	v11/v12: public_profile, email, pages_manage_ads, pages_manage_metadata, pages_read_engagement, pages_read_user_content, pages_manage_posts, pages_manage_engagement
Facebook Marketing	Channels > Social	The Facebook Marketing channel allows a user to create and manage Facebook Ads, including campaigns, ads sets, and creatives. Ad analytics are sent back to RPI and are made available to report on.	v11/v12: ads_management, pages_manage_ads, pages_manage_metadata, pages_read_engagement, pages_read_user_content, ads_read, pages_manage_posts, pages_manage_engagement, business_management
Facebook Offline Conversions	Channels > Data Onboarding	The Facebook Offline Conversions connector allows users to push offline data, such as in-store transactions, to the Facebook platform where it will be matched to determine how many customers viewed or clicked on a Facebook Ad, prior to the event occurring.	v11/v12: ads_management, business_management, pages_read_engagement
Facebook Custom Audiences	Channels > Data Onboarding	The Facebook Custom Audience connector allows users to generate pre-defined and custom data files and pushes that data to the Facebook platform as either a new custom audience or appended to an existing custom audience. This process will generate a set of aggregated metrics, which can be viewed within the application.	v11/v12: ads_management, business_management
Facebook Lookalike Audiences	Channels > Social	The Facebook Lookalike Audience connector allows users to create a lookalike audience of a custom audience. Facebook finds users who have similar attributes to the people who are in the base Custom Audience.	v11/v12: ads_management, business_management, pages_read_engagement

3.1.2 Creating a Facebook App

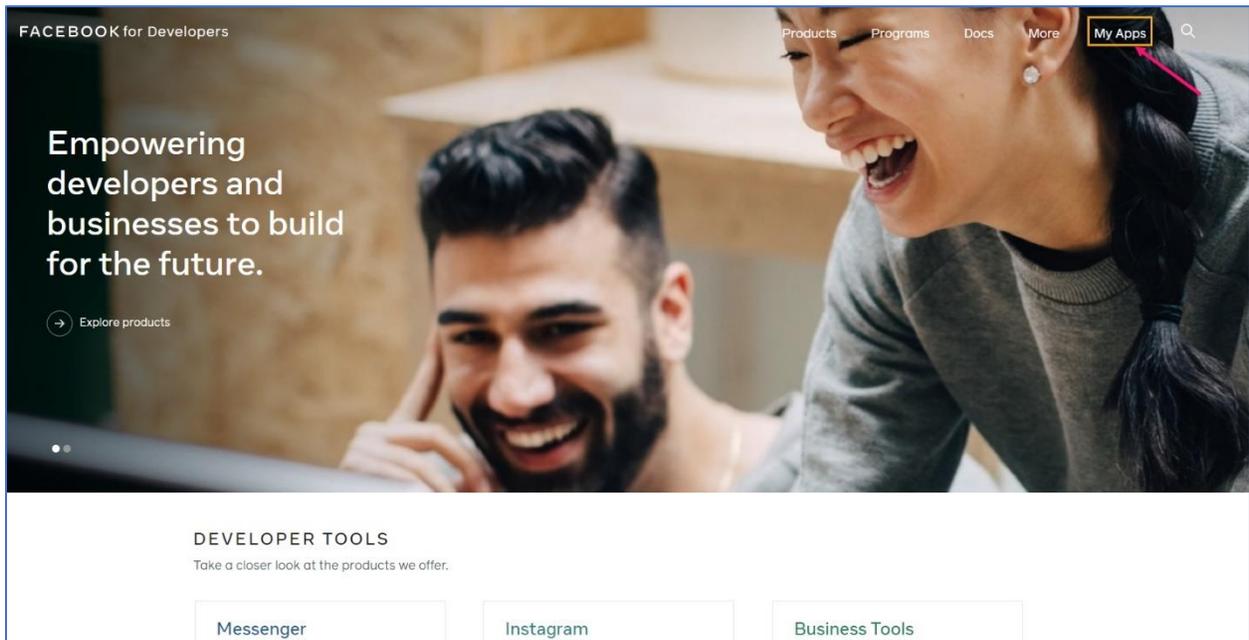
To use Facebook connectors in RPI, a Facebook App must be provisioned and configured with the appropriate permissions, depending on the connector. The following is a list of steps necessary to create the Facebook App:
Create a Facebook Developer account:

Before creating a Developer account, ensure you are logged into a Facebook account.

You will need a Facebook Developer account to get started. If you do not have one, upgrade your personal Facebook account to a Facebook Developer account. Skip this step if you already have a developer account. Before creating a Developer account, ensure you are logged into a Facebook account.

3.1.2.1 Add a New Facebook App

Go to <https://developers.facebook.com/> and click My Apps on the menu.



Click “Create App” within the dropdown and enter a Display Name for your App. The Contact Email will default to the email associated with the Developer account but can be changed, if necessary. Once complete, click on the “Create App ID” button.

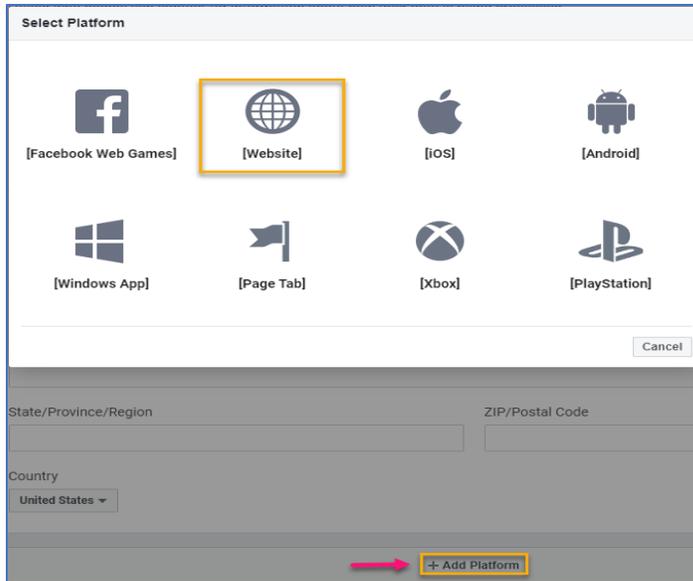
A screenshot of the 'Create a New App ID' form. The title is 'Create a New App ID' and the subtitle is 'Get started integrating Facebook into your app or website'. There are two input fields: 'Display Name' with the placeholder text 'The name you want to associate with this App ID' and 'Contact Email' with a greyed-out placeholder. Below the 'Contact Email' field is a note: 'This email address is used to contact you about potential policy violations, app restrictions or steps to recover the app if it's been deleted or compromised.' At the bottom, there is a checkbox area with the text 'By proceeding, you agree to the Facebook Platform Policies' and two buttons: 'Cancel' and 'Create App ID'.

3.1.2.2 Configure Facebook App Basic Settings

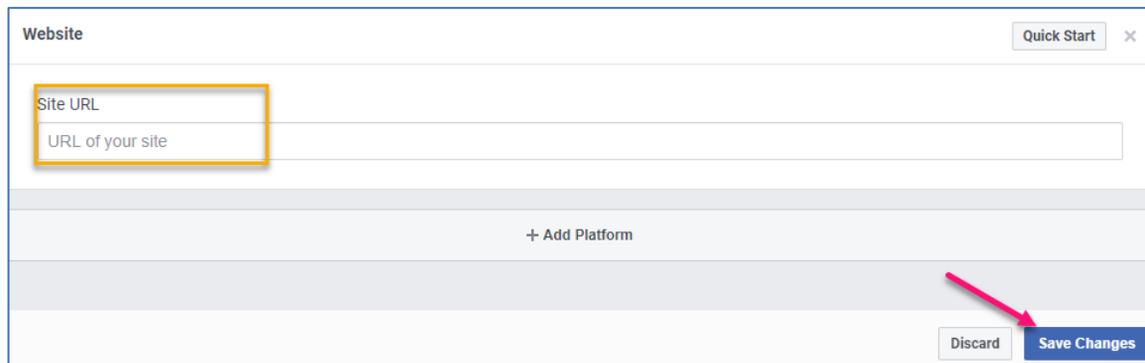
Open the Facebook App Basic Settings page by navigating to Settings > Basic.

1. Create a Namespace for your Facebook App. Note that the namespace can only contain lowercase letters, dashes, and underscores
2. Enter an App Domain, with your company or organization's website URL, for example: <https://www.redpointglobal.com/>.
3. Enter your company/organization's Privacy Policy URL.
4. Optional – Enter your company/organization's Terms of Service URL.
5. Upload an icon image for your Facebook App. The image must have a transparent background and cannot be larger than 1024 x 1024.
6. Choose a Category for your Facebook App – choose any that apply to your organization.
7. Under Business Use, choose "Support my own business".
8. Complete the Business Verification to connect your Facebook App to your Facebook Business Manager account. Note, this step is not required to start using the Facebook App with RPI's connectors.

9. Scroll to the bottom of the page and click on the "Add Platform" button and select "Website":

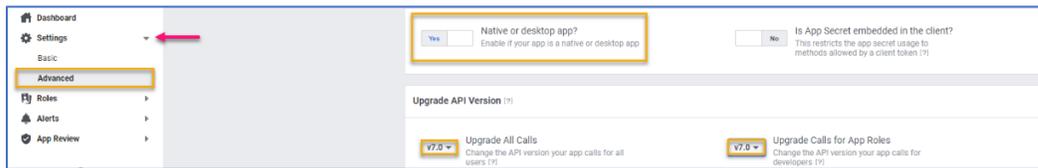


10. In the Site URL text box, enter the same URL used in step 3C:
11. Complete the Basic configuration by clicking on the “Save Changes” button.

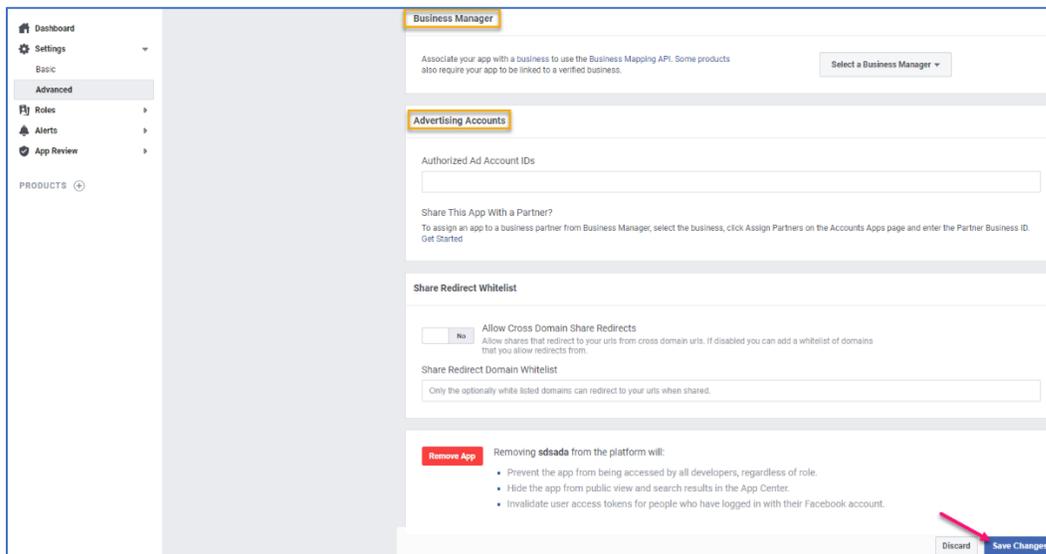


3.1.2.3 Configure Facebook App Advanced Settings

1. Open the Facebook App Advanced Settings page by navigating to Settings > Advanced.

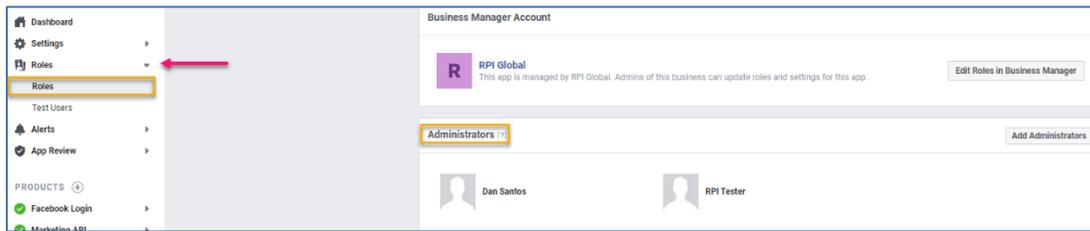


2. Toggle to “Yes” for Native or Desktop app.
3. Choose the latest API version for both “Update All Calls” and “Upgrade Call for App Roles”. As of December 2021, the latest API version is 12.0.
4. Scroll down the page and under “Business Manager”, choose the Business Manager account to associate with your Facebook App
5. Under “Advertising Account”, enter an Authorized Ad Account ID
6. Once complete, hit the “Save Changes” button to proceed to the next step.



3.1.2.4 Configure Roles for Your Facebook App

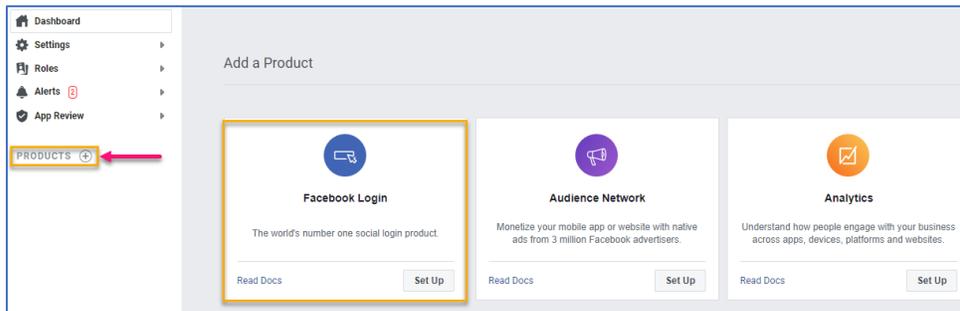
1. Open the Facebook Roles page by navigating to Roles > Roles.



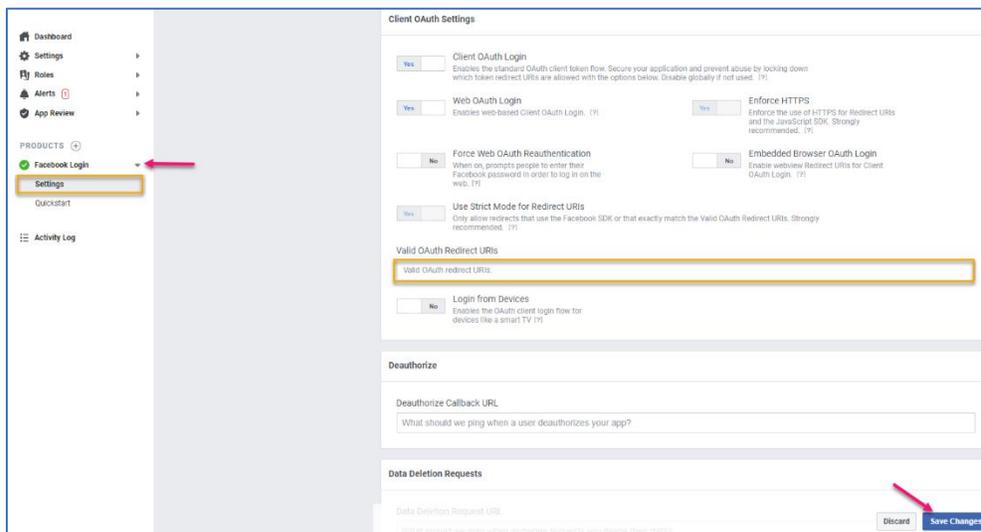
2. Under Administrators, associate the Facebook Account(s) that will be configured as the Authorized Account in the RPI Channel configuration.

3.1.2.5 Configure the Facebook Login Product

1. Add the Facebook Login product by navigating to Products and clicking the plus+ icon.



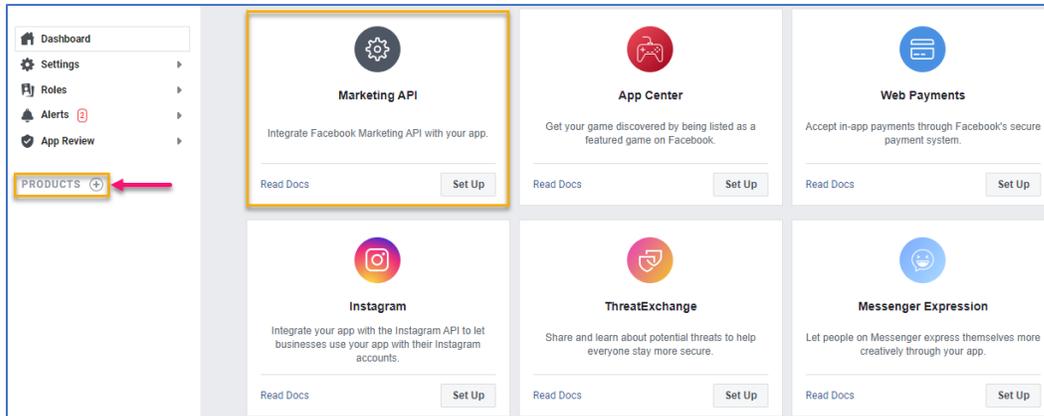
2. Find the Facebook Login product and click on the “Set Up” button.
3. Navigate to Facebook Login > Settings.



- In the “Valid OAuth Redirect URIs” text box, paste the following: <https://www.redpointglobal.com/> as well as the URL configured for the Website Platform in section 3K. The authorization page will not display correctly without the platform URL included as a redirect URI.
- Click on the “Save Changes” button.

3.1.2.6 Configure the Marketing API product:

- Add the Marketing API product by navigating to Products and clicking the plus+ icon.



- Find the Marketing API product and click on the “Set Up” button.

Note regarding App Mode

There is currently no requirement to approve the Facebook App before it can be used in RPI. The App can remain in “Development” mode and continue to be used in RPI. The only requirement is ensuring the authorizing Facebook user account is configured as an Administrator in the App Roles (steps covered in step 5).

Configuring RPI Channel - Important

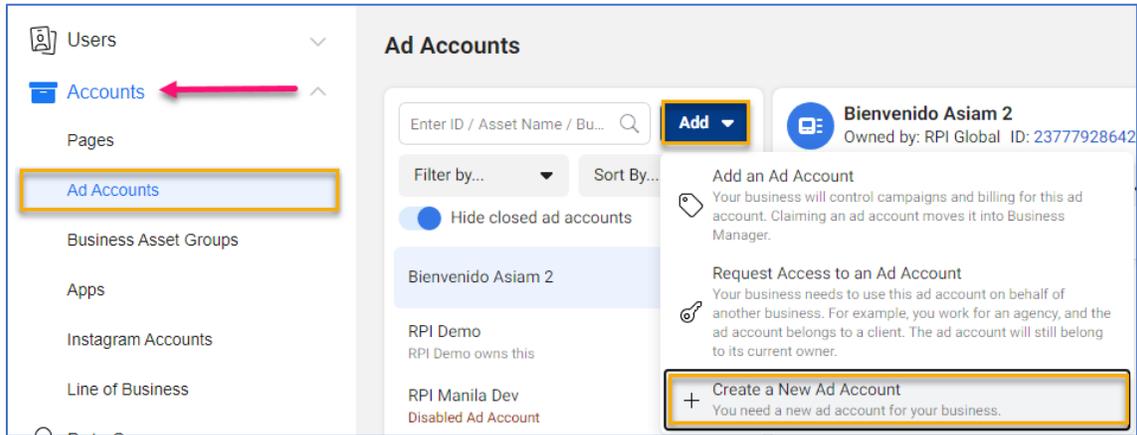
App permissions can be retained with their default values unless other permissions are required.

Account name is the name of Facebook profile, not the page or app.

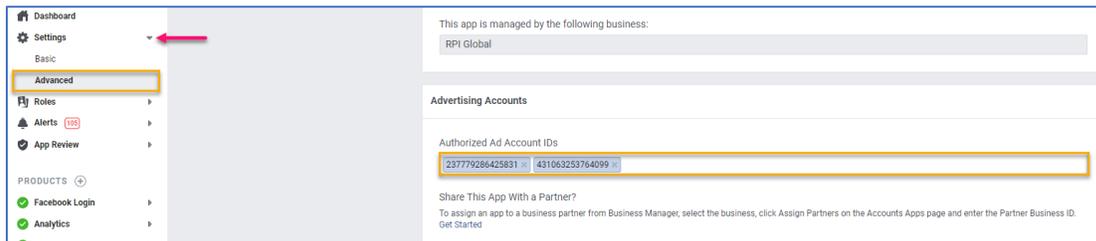
For applicable Facebook Channels, the Page Name is the selected page to use from one of the lists of associated pages to the Facebook account. This field is auto populated after successful authorization.

3.1.3 Creating an Ad Account and Linking it to the Facebook App ID

1. Go to Business Manager Settings at <https://business.facebook.com/>.
2. Collapse Accounts and click Ad Accounts.



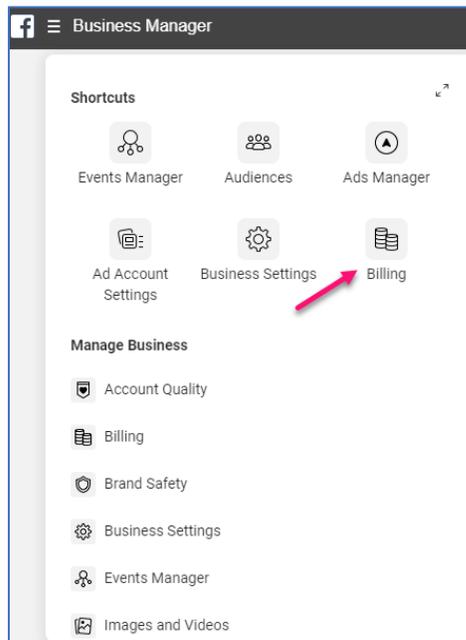
3. Click the blue Add button, then Create a New Ad Account.
4. Fill out the required information and click Create Ad Account.
5. After creating an Ad account, link it to your Facebook App. Go to <https://developers.facebook.com/>
6. Go to Settings > Advanced. Locate the Advertising Accounts section, and add the Ad Account ID(s) you want to use to promote your app.



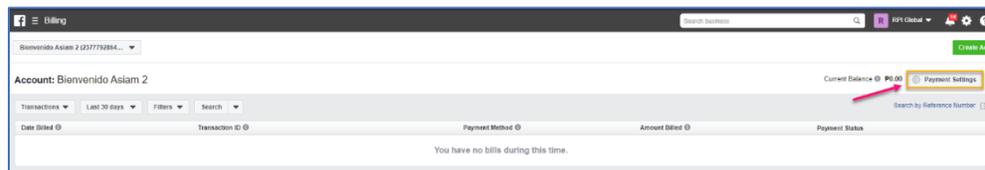
3.1.4 Setting up the Payment Method

Before you can start advertising, you will need to give Facebook additional account information and enter your credit card details.

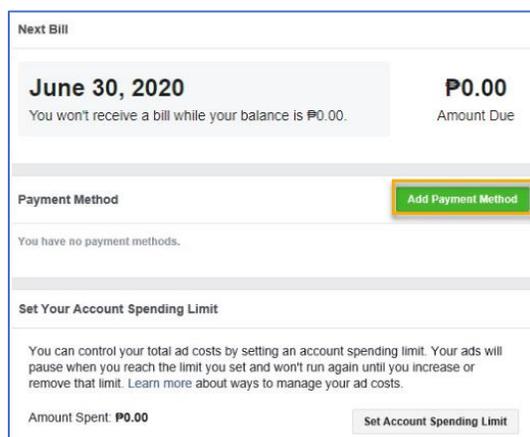
1. Go to Business Manager Settings at <https://business.facebook.com/>.
2. Navigate the Business Manager menu to locate Billing.



3. Click Payment Settings.



4. Click Add Payment Method.



5. Choose the required payment method.
6. Complete the required information.
7. Click Continue.

Select a Payment Method Help

Add a new payment method to your Facebook Ads account · [Terms](#) [Apply](#)

Credit or Debit Card VISA  

Card Number

Expiration

Security Code ?

PayPal PayPal

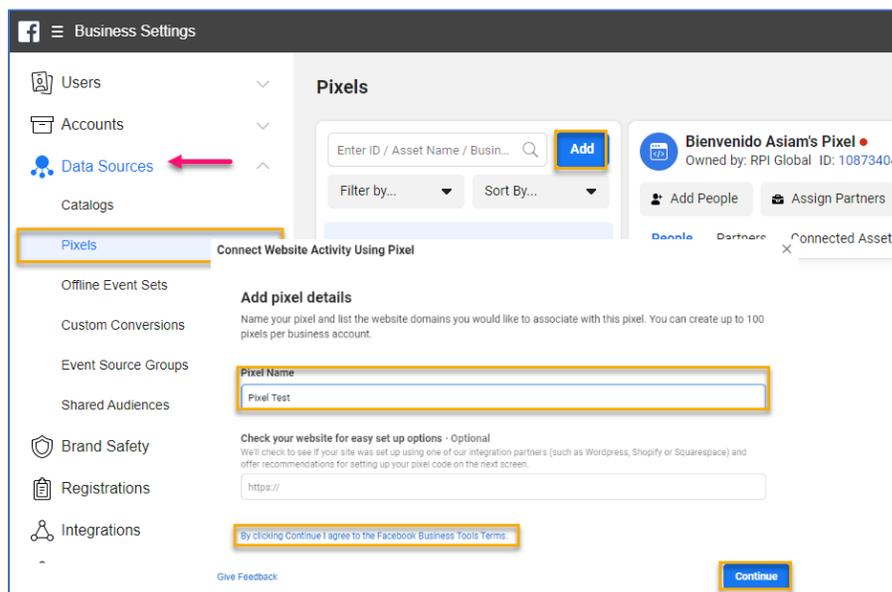
Facebook Ad Coupon

 Your payment info is stored securely. [Learn More.](#)

3.1.5 Create a Pixel in Business Manager (Optional)

The Facebook pixel is a piece of code that is placed on your website to report conversions, build audiences and get insights about how people are using the site. You can create up to 10 pixels in your Business Manager account.

1. Go to Business Settings.
2. Under Users and Accounts collapse Data Sources.
3. Click Pixels
4. Click the blue Add button.



5. Provide Pixel Name.
6. Click to agree to the Facebook Pixel Terms.
7. Click Continue.
8. To Start installing your pixel on your website, Click Set Up Now. If you would prefer to stay in Business Manager, click Continue.

3.1.6 Domain Verification (Optional)

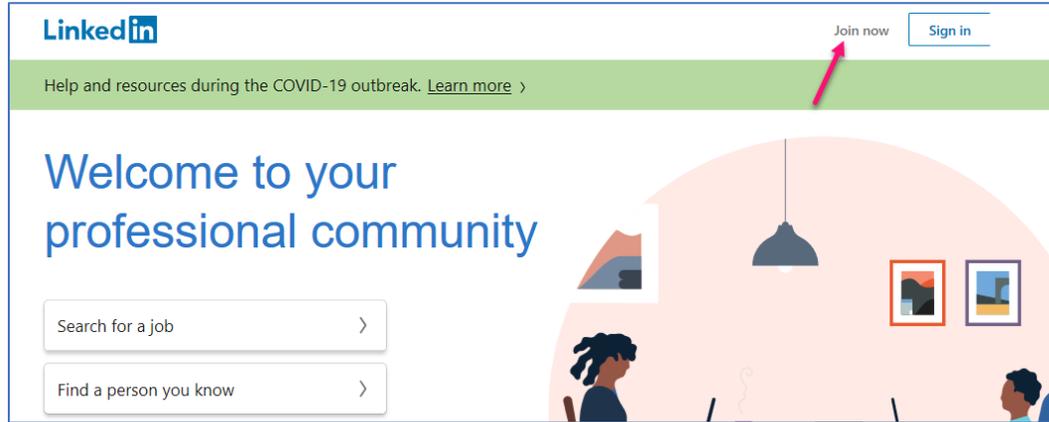
Domain verification is ownership that controls editing privileges of URLs and other content to prevent misuse of your domain and to prevent the spread of misinformation. You may get the error "Only owners of the URL have the ability to specify the picture, name, thumbnail or description params" when running a Facebook Post or Facebook Marketing interaction without verifying your domain. For Facebook Post with an image, the source URL of the image must come from the verified domain.

To verify your domain, visit: <https://developers.facebook.com/docs/sharing/domain-verification/verifying-your-domain>.

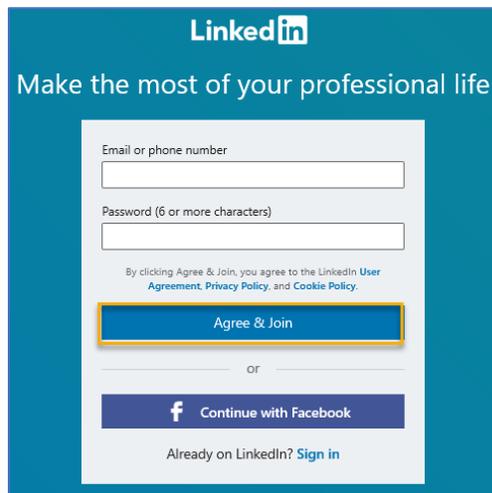
3.2 LinkedIn

This section describes how to create and set up a LinkedIn application for use in RPI. Please follow the steps below:

1. In a browser, go to <https://www.linkedin.com/> and click on Join now.



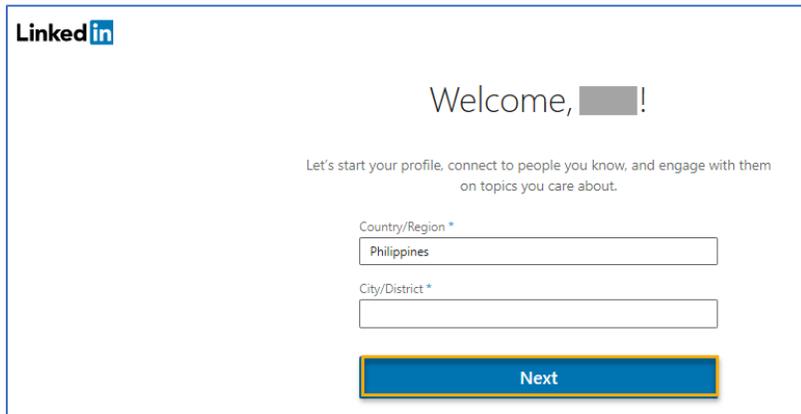
2. Enter the required details and click Agree & Join.

A screenshot of the LinkedIn sign-up form. The background is a solid teal color. At the top is the LinkedIn logo and the text "Make the most of your professional life". The form itself is a white box with a light gray border. It contains the following elements: a label "Email or phone number" above a text input field; a label "Password (6 or more characters)" above another text input field; a line of small text: "By clicking Agree & Join, you agree to the LinkedIn [User Agreement](#), [Privacy Policy](#), and [Cookie Policy](#)."; a blue button with a white border and the text "Agree & Join" highlighted with a yellow and orange border; the word "or" centered below the button; a dark blue button with a white border, the Facebook logo, and the text "Continue with Facebook"; and at the bottom, the text "Already on LinkedIn? [Sign in](#)".

3. Type your First & Last Name and click Continue.

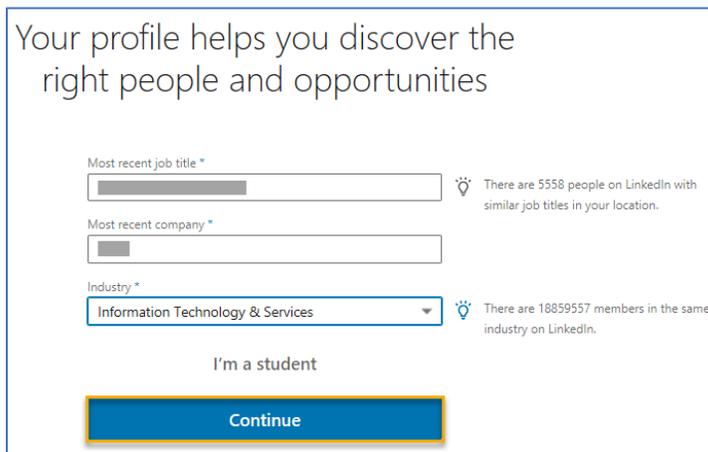
A screenshot of the LinkedIn sign-up form, showing the name entry step. The background is a solid teal color. At the top is the LinkedIn logo and the text "Make the most of your professional life". The form is a white box with a light gray border. It contains the following elements: a label "First name" above a text input field; a label "Last name" above another text input field; and a blue button with a white border and the text "Continue" highlighted with a yellow and orange border.

4. Click the box below select your current Country, City and click Next.



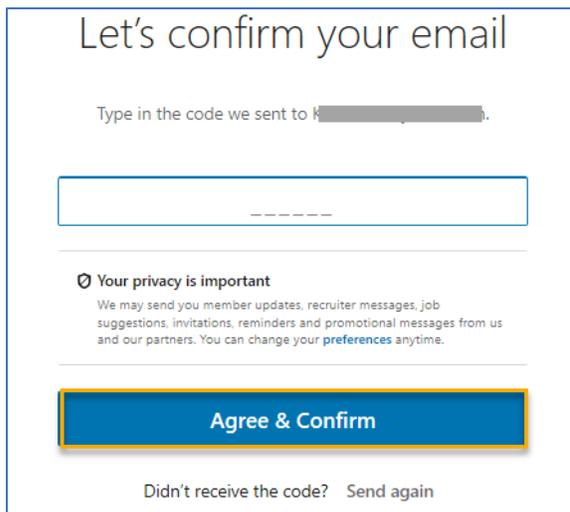
The screenshot shows the LinkedIn profile setup page. At the top left is the LinkedIn logo. The main heading is "Welcome, [redacted]!". Below it is the text "Let's start your profile, connect to people you know, and engage with them on topics you care about." There are two input fields: "Country/Region *" with "Philippines" selected, and "City/District *". At the bottom is a blue "Next" button.

5. Indicate whether or not you're a student. To do so, fill out the required fields, then click the I'm a student or the Continue box.



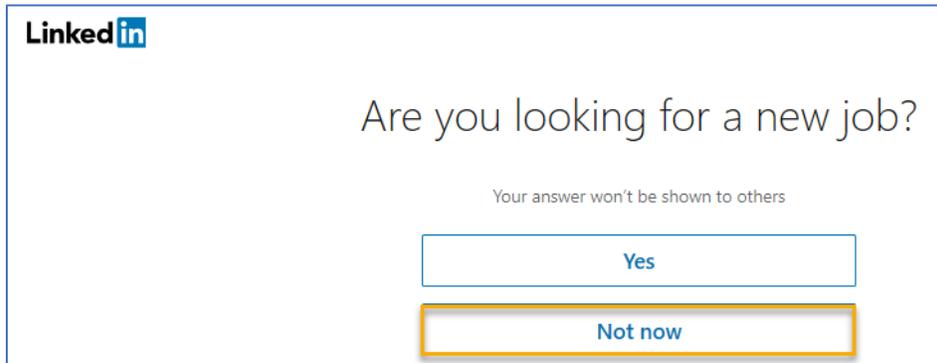
The screenshot shows the LinkedIn profile setup page. The heading is "Your profile helps you discover the right people and opportunities". There are three input fields: "Most recent job title *" (with a greyed-out field), "Most recent company *" (with a greyed-out field), and "Industry *" (with "Information Technology & Services" selected). To the right of the first two fields is a lightbulb icon and text: "There are 5558 people on LinkedIn with similar job titles in your location." To the right of the third field is a lightbulb icon and text: "There are 18859557 members in the same industry on LinkedIn." Below the fields is a radio button labeled "I'm a student" and a blue "Continue" button.

6. Check your email to verify account. Confirm your email address (you can also copy the code and paste it into the code field on your LinkedIn page).

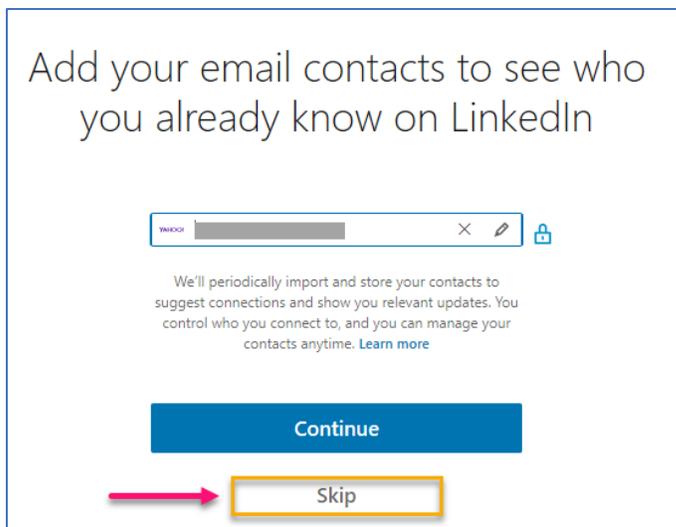


The screenshot shows the LinkedIn email verification page. The heading is "Let's confirm your email". Below it is the text "Type in the code we sent to [redacted]:". There is a large input field for the code. Below the input field is a section titled "Your privacy is important" with a checkmark icon. The text reads: "We may send you member updates, recruiter messages, job suggestions, invitations, reminders and promotional messages from us and our partners. You can change your preferences anytime." At the bottom is a blue "Agree & Confirm" button and a link "Didn't receive the code? Send again".

7. These options control what type of information LinkedIn shows you in your Home page. Click on Not now.

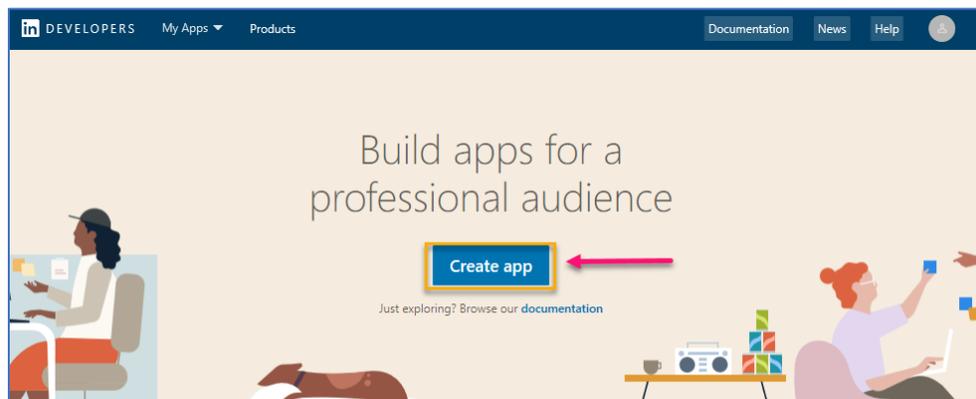


8. Decide whether or not to import contacts. If choosing to Skip contact import , you may need to click in a popup to confirm your decision.

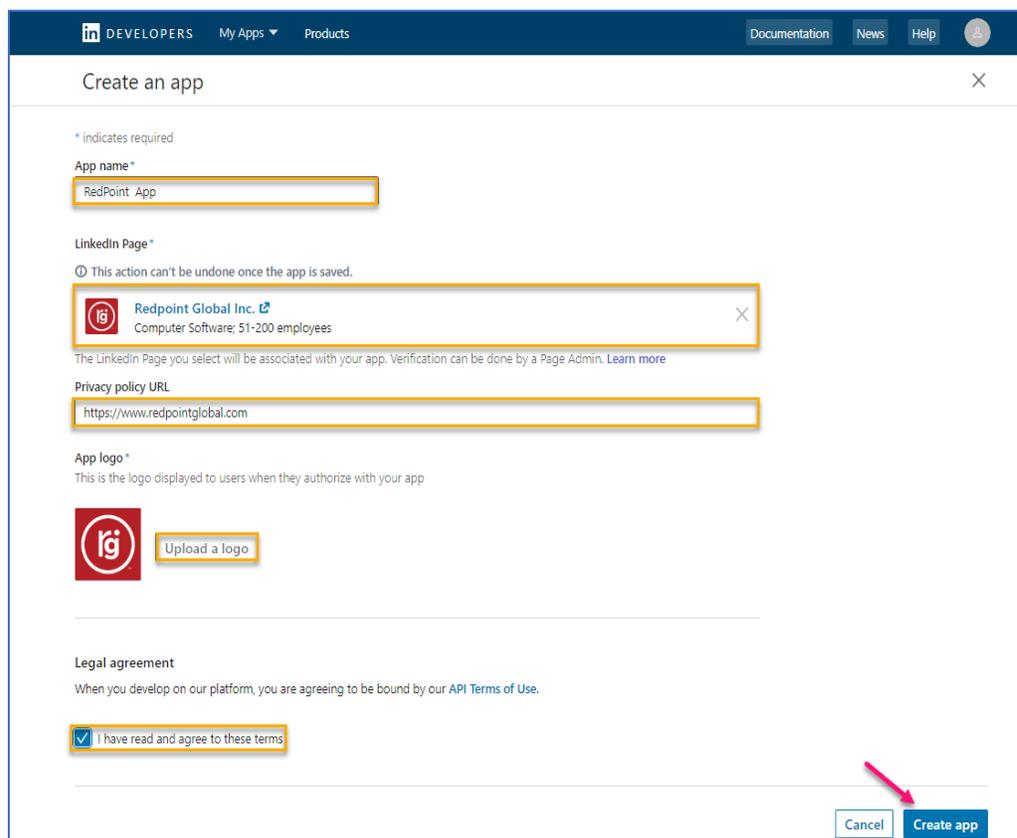


3.2.1 Creating a New LinkedIn App

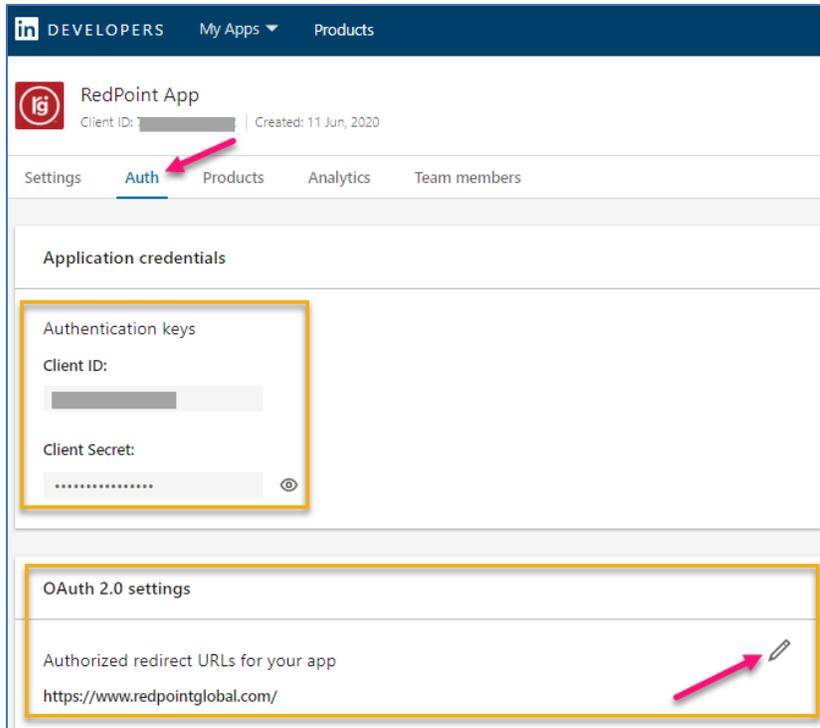
1. To create a new LinkedIn app, Go to the developer site: <https://developer.linkedin.com/> and click Create app.



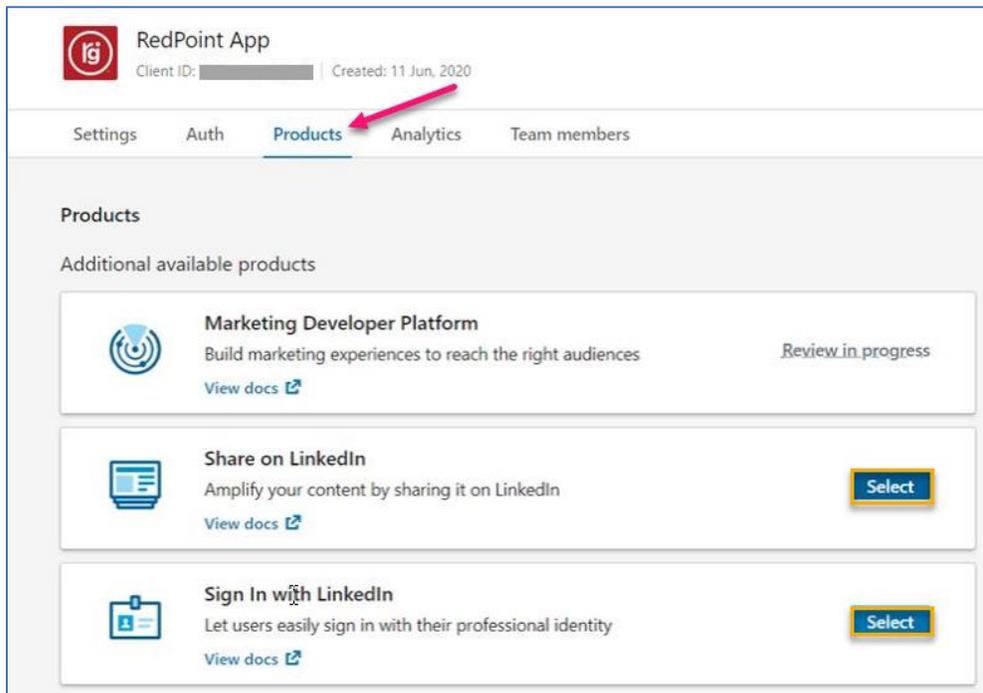
2. Fill out the required details and check the box to confirm that you have read and agree to the terms.
3. Click Create app.

A screenshot of the 'Create an app' form in the LinkedIn Developers portal. The form is titled 'Create an app' and includes several required fields: 'App name*' with the value 'RedPoint App'; 'LinkedIn Page*' with a dropdown menu showing 'Redpoint Global Inc. Computer Software; 51-200 employees'; 'Privacy policy URL' with the value 'https://www.redpointglobal.com'; and 'App logo*' with a red circular logo and an 'Upload a logo' button. At the bottom, there is a 'Legal agreement' section with a checked checkbox 'I have read and agree to these terms'. A pink arrow points to the 'Create app' button at the bottom right of the form.

4. Once the App has been created, go to the Auth tab.
5. Click the pencil button to add Redirect URLs.
6. Copy the Client ID, Client Secret and Redirect URLs value and store them securely.



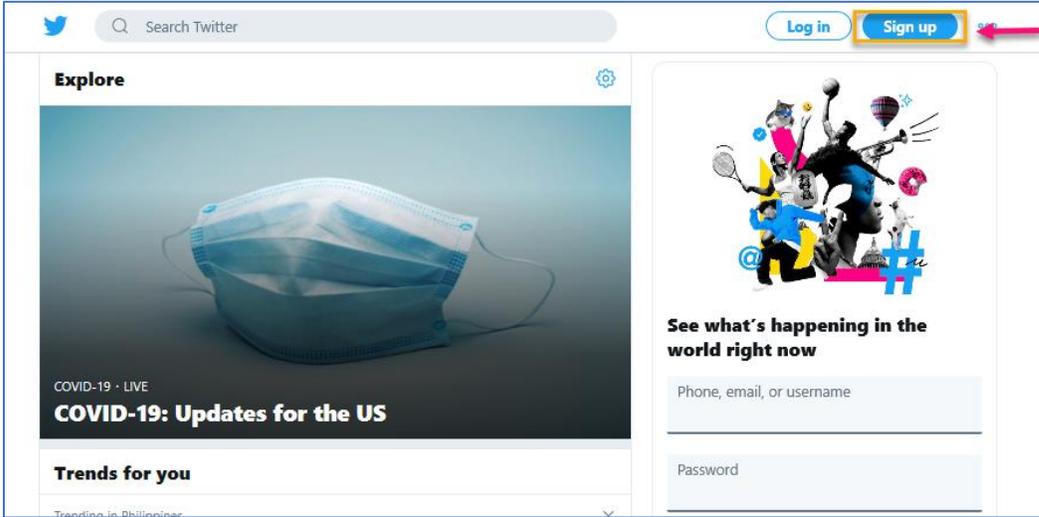
7. Go to the Product tab and select Share on LinkedIn and Sign In with LinkedIn.



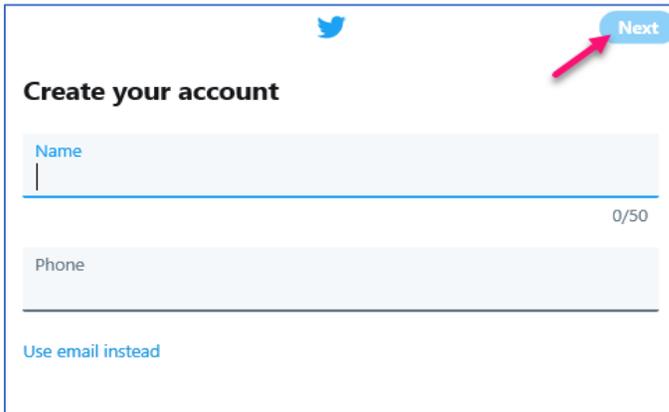
3.3 Twitter

This section describes how to configure and create a Twitter app for use with RPI. Please follow the steps below:

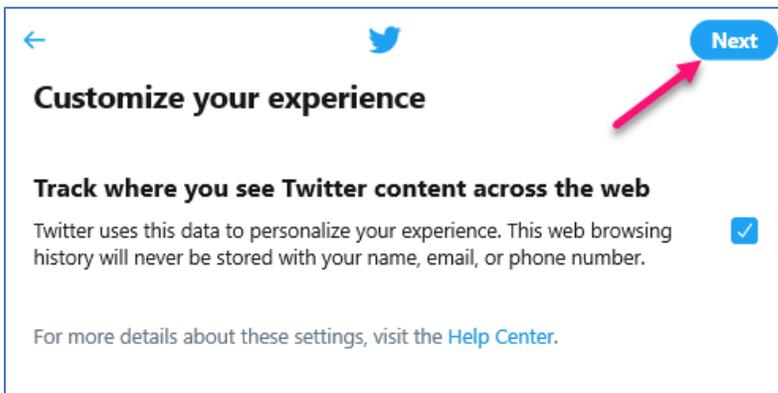
1. In a browser, go to <https://twitter.com/> and click Sign up.



2. Type your Name and Phone or Use email instead, and click Next.



3. Click Next at Customize your experience.



4. Click Sign up to create your account.

Create your account

By signing up, you agree to the [Terms of Service](#) and [Privacy Policy](#), including [Cookie Use](#). Others will be able to find you by email or phone number when provided · [Privacy Options](#)

5. Check your Email to verify your account, copy the code, paste it into the code field on your Twitter page and click Next.

We sent you a code

Enter it below to verify @gmail.com.

[Didn't receive email?](#)

6. Enter a Password and click Next.



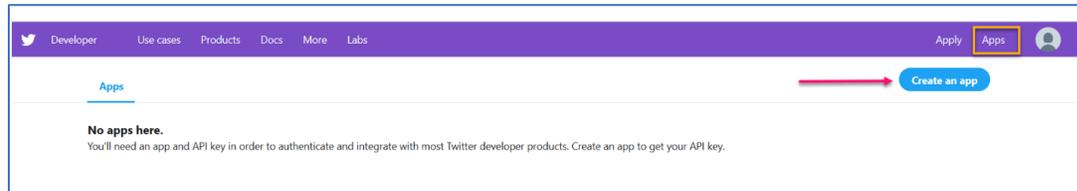
You'll need a password

Make sure it's 6 characters or longer. 

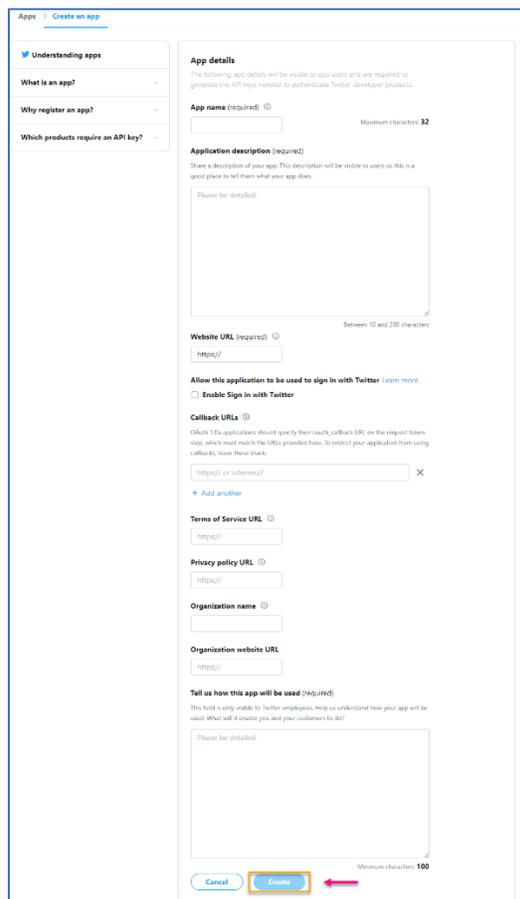


3.3.1 Creating a New Twitter App

1. Visit the Twitter Developer site: <https://developer.twitter.com/>. Sign in with your Twitter account.
2. Click Apps from the top user menu and click the Create an app button to create a new application.



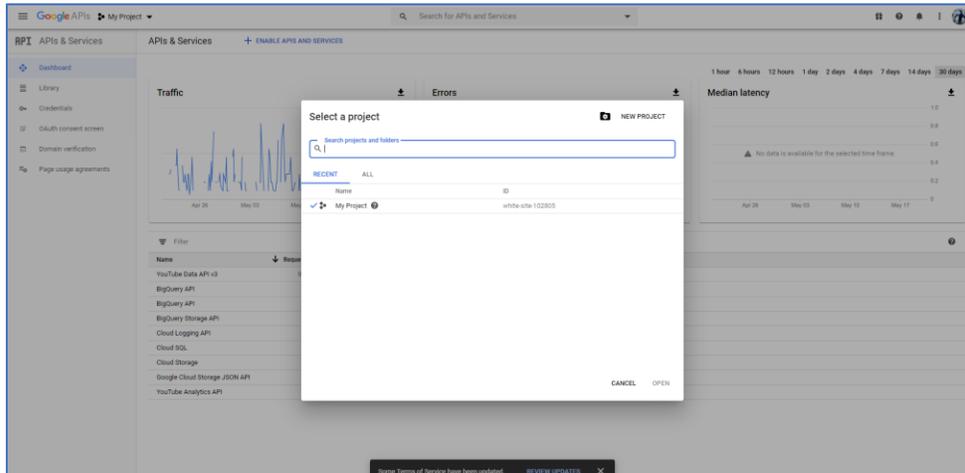
3. Fill out the required fields and click Create.

A screenshot of the 'Create an app' form on the Twitter Developer website. The form is titled 'Apps > Create an app' and is divided into several sections. On the left, there is a sidebar with 'Understanding apps' and three expandable sections: 'What is an app?', 'Why register an app?', and 'Which products require an API key?'. The main form area includes: 'App details' section with a text input for 'App name (required)' (32 characters max) and a text area for 'Application description (required)'; 'Website URL (required)' text input; 'Allow this application to be used to sign in with Twitter' checkbox (disabled) and 'Enable Sign in with Twitter' checkbox; 'Callback URLs' section with a text input and an 'Add another' link; 'Terms of Service URL', 'Privacy policy URL', and 'Organization name' text inputs; 'Organization website URL' text input; and 'Tell us how this app will be used (required)' text area (100 characters min). At the bottom, there are 'Cancel' and 'Create' buttons, with a red arrow pointing to the 'Create' button.

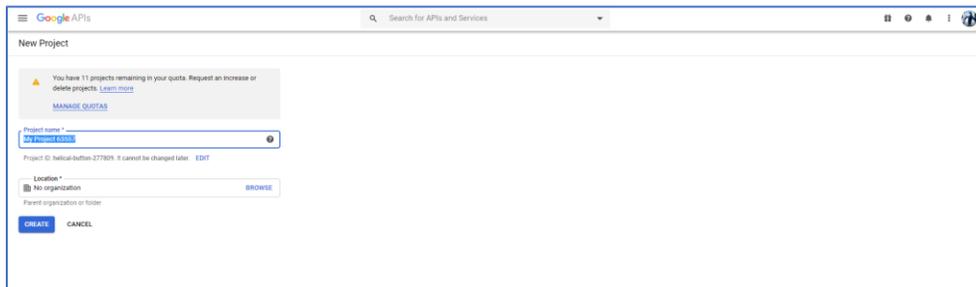
4. Click the Create button.

3.4 YouTube

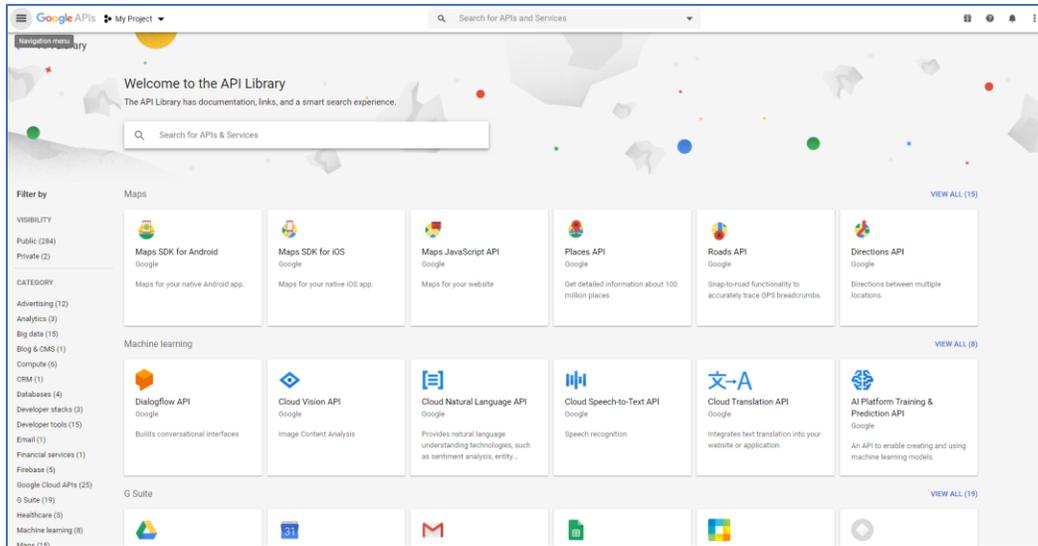
1. Log into the Google account used for your YouTube Channel.
2. Go to <https://console.developers.google.com>.
3. Click “Select a project” then click the “NEW PROJECT” button to create a new project.



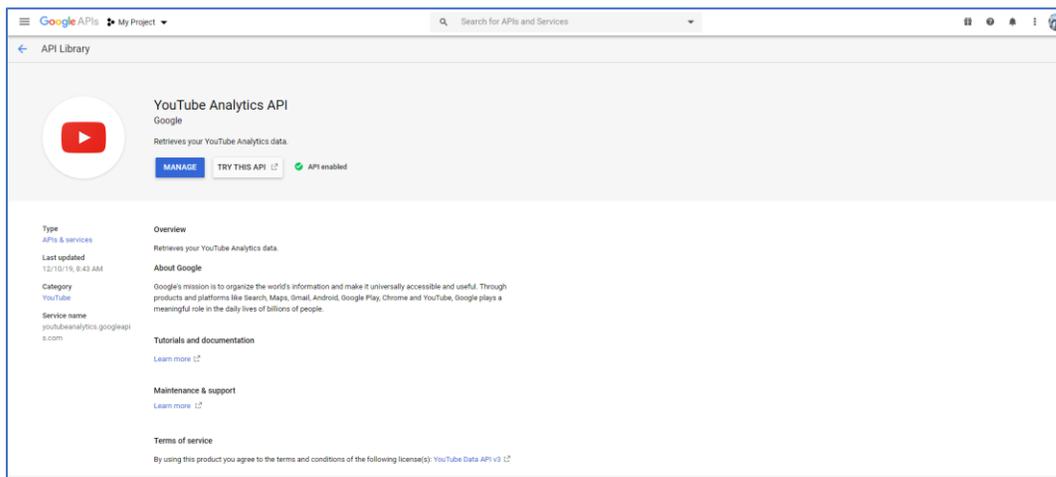
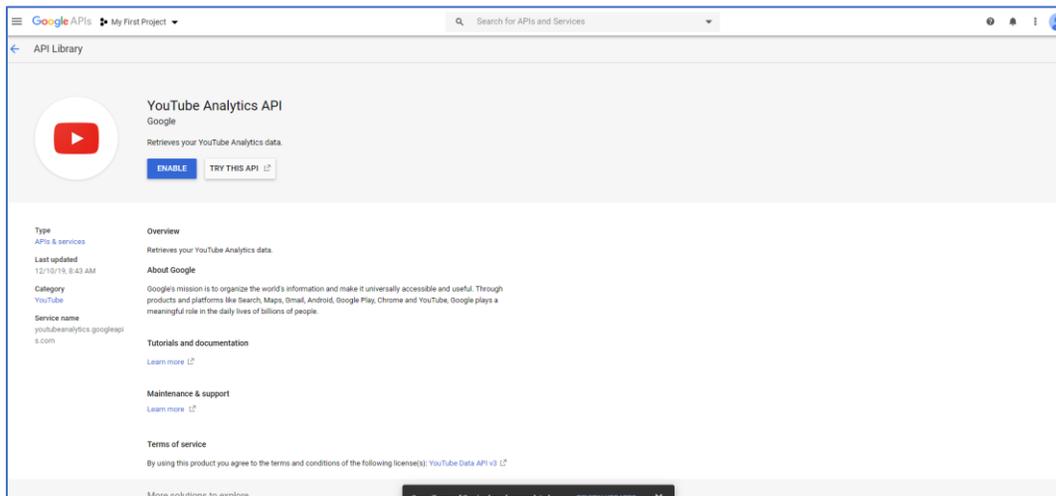
4. Enter the Project name (recommend “RPI” in the name), and click “Create”.



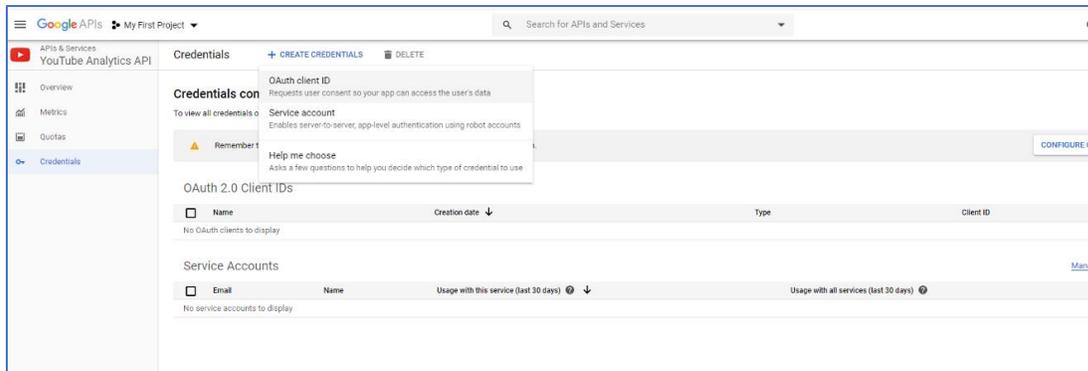
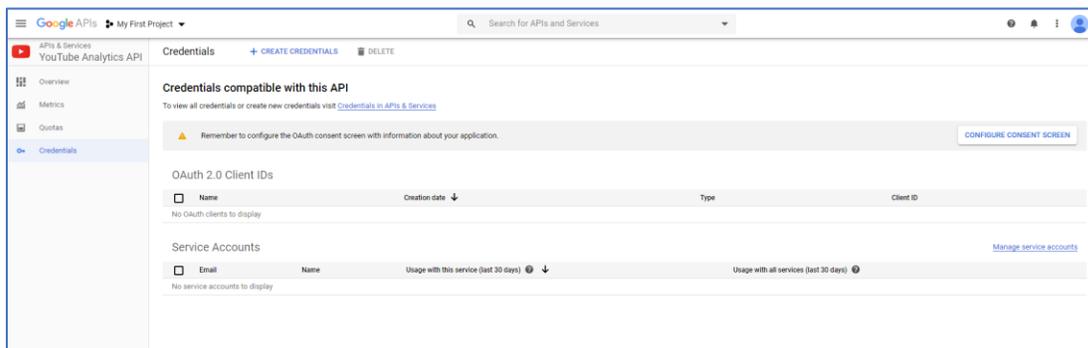
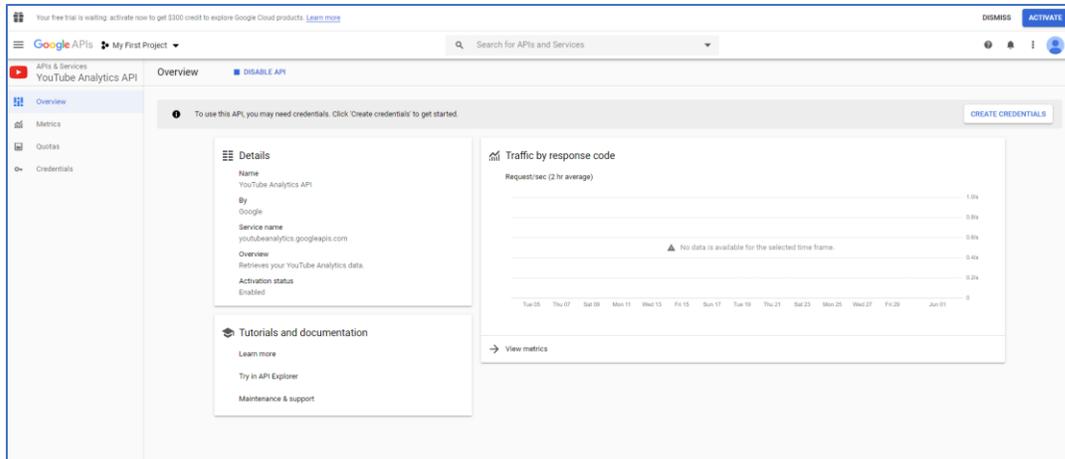
5. You will be redirected to the Dashboard page for your new project. Select the Library link to navigate to the Google APIs Library page.



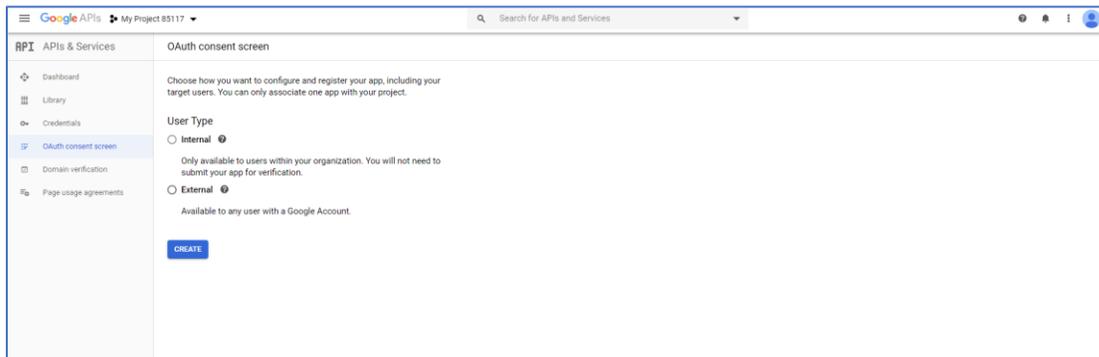
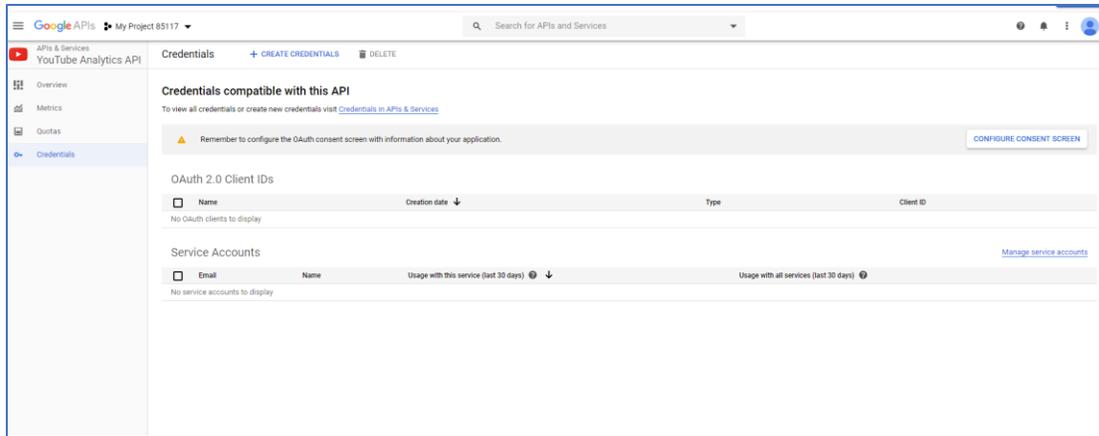
6. Select “YouTube Analytics API” and click Enable.



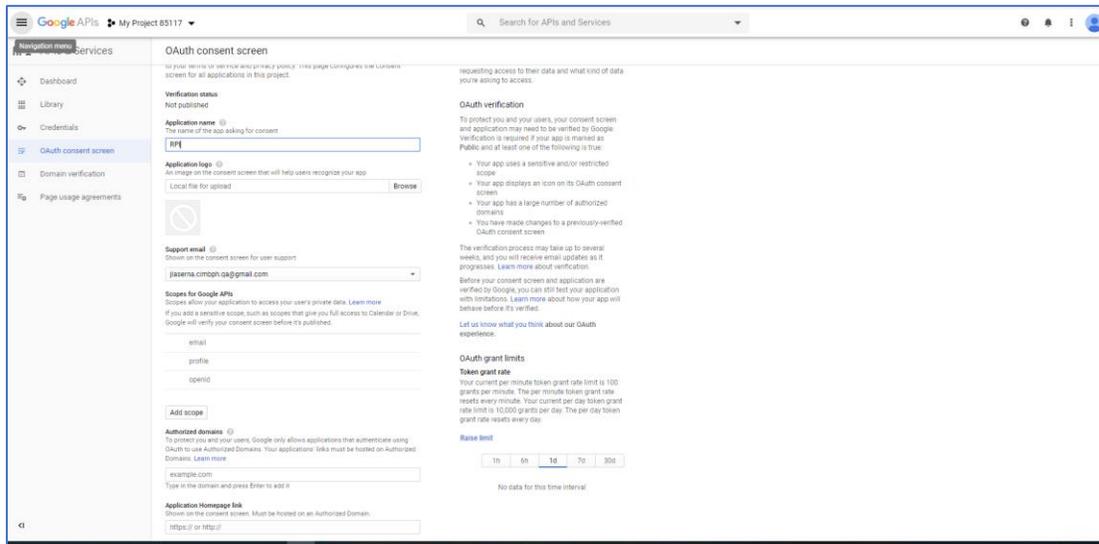
7. When complete, click “Credentials” in the left-hand menu. Click “Add Credentials” and select OAuth 2.0 client ID from the dropdown.

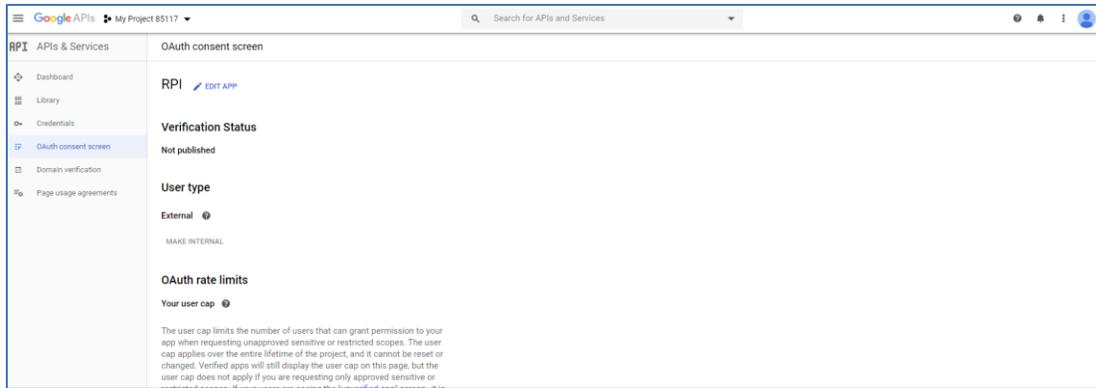


8. On the next screen, click "Configure Consent Screen".

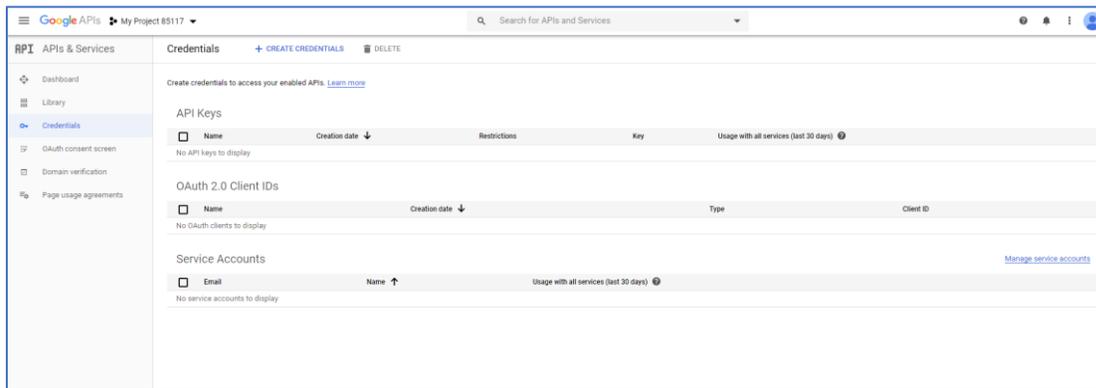


9. Enter "RPI" in the Product Name field (email address will be populated with your Google log-in). Click Save.

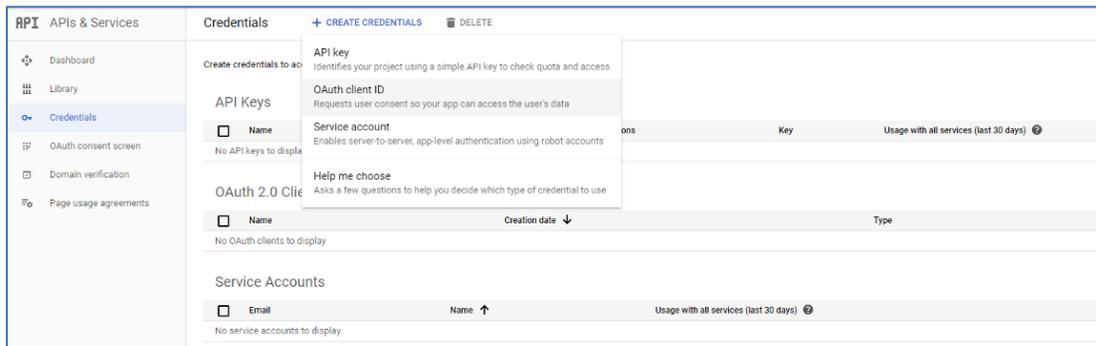




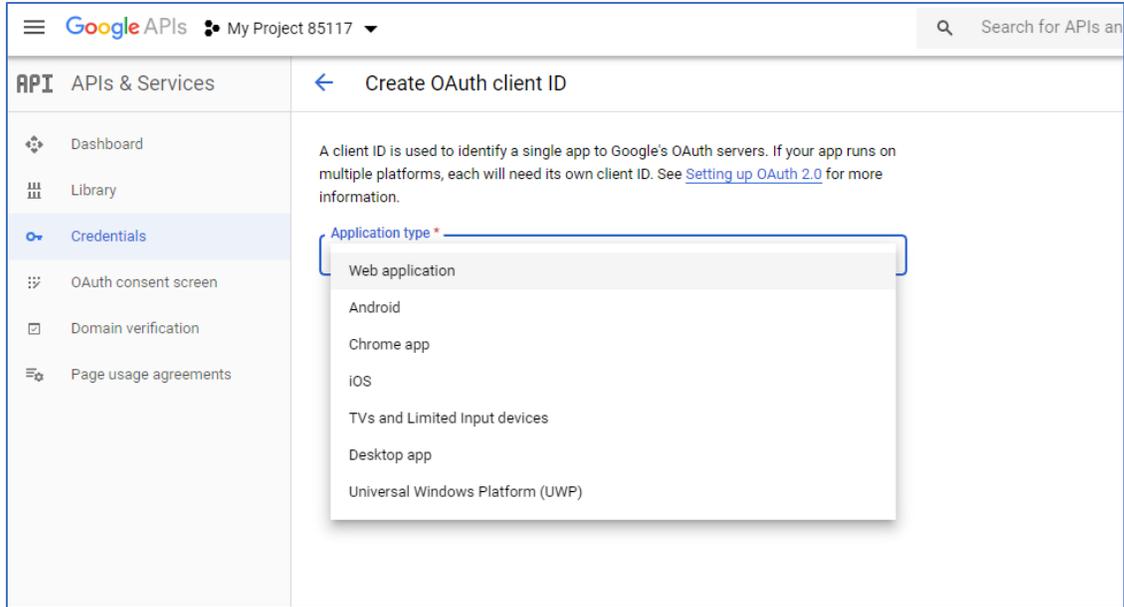
10. Go to Credentials then click Add Credentials.



11. Select OAuth Client ID.

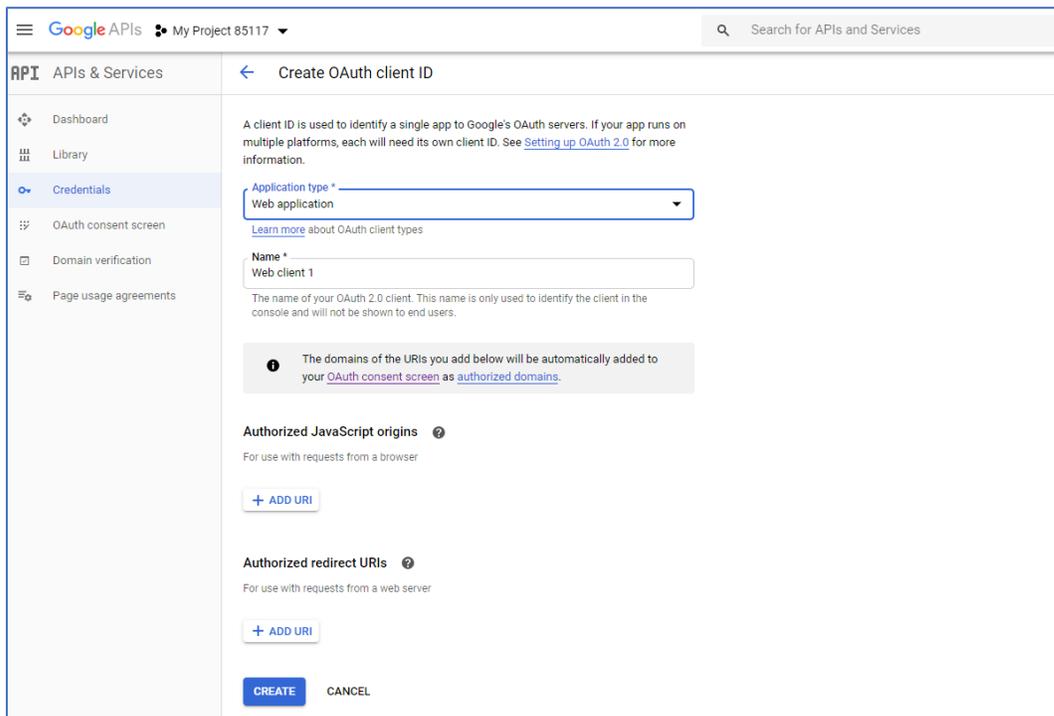


12. Select Web Application from the application type dropdown then click create. The next screen displays the client ID and client secret you will need to enter into RPI. Copy and paste these into a document.



13. Go to RPI > Configuration > Channel (Find the YouTube channel that you wish to update.

14. Enter the Client ID and Client secret in the appropriate fields and http://localhost/authorize for the Redirect URI.



The screenshot shows the Google APIs & Services console for project 'My Project 85117'. The 'Credentials' section is active, displaying a modal dialog titled 'OAuth client created'. The dialog contains the following information:

- OAuth client created**
- The client ID and secret can always be accessed from Credentials in APIs & Services.
- Warning: OAuth is limited to 100 [permitted scope types](#) until the [OAuth consent screen](#) is verified. This may require a verification process that can take several days.
- Your Client ID:** 53623984163-gom9kr-rpa993-rj1ps7up8tfga4cbf85-apps.goo
- Your Client Secret:** x5x_vr8r1ac9vEAEuLY9VVV

Below the dialog, a small black notification box states 'OAuth client created'. The background interface shows sections for API Keys, OAuth 2.0 Client IDs (with one 'Web client 1' listed), and Service Accounts.

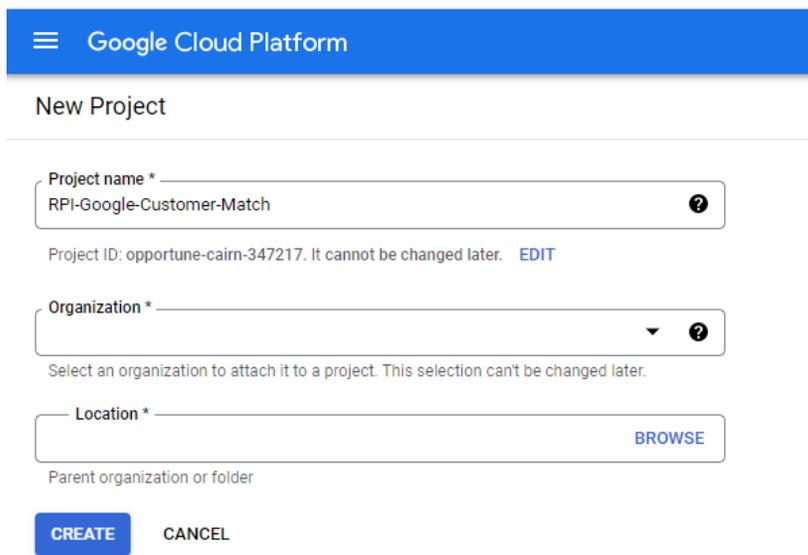
3.5 Google Ads Customer Match

The configuration described in this section will cover the setup for a Google Ads account and accessing the Customer Match lists.

Note: A Google Cloud Platform (GCP) account is required to manage authentication for the Google Ads APIs.

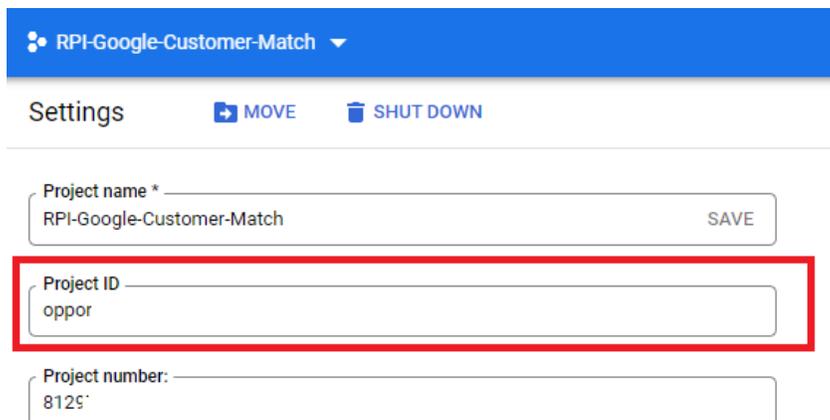
3.5.1 Provision a Project within GCP

1. Log into GCP and create a new Project (if necessary). Enter the relevant details click the CREATE button:



The screenshot shows the 'New Project' form in the Google Cloud Platform console. At the top, there is a blue header with a hamburger menu icon and the text 'Google Cloud Platform'. Below the header, the title 'New Project' is displayed. The form contains three main input fields: 'Project name *' with the value 'RPI-Google-Customer-Match' and a help icon; 'Organization *' which is a dropdown menu with a help icon and a note below it: 'Select an organization to attach it to a project. This selection can't be changed later.'; and 'Location *' with a 'BROWSE' button and a note below it: 'Parent organization or folder'. At the bottom of the form, there are two buttons: 'CREATE' and 'CANCEL'. The 'Project ID' is shown as 'opportune-cairn-347217' with a note that it cannot be changed later and an 'EDIT' link.

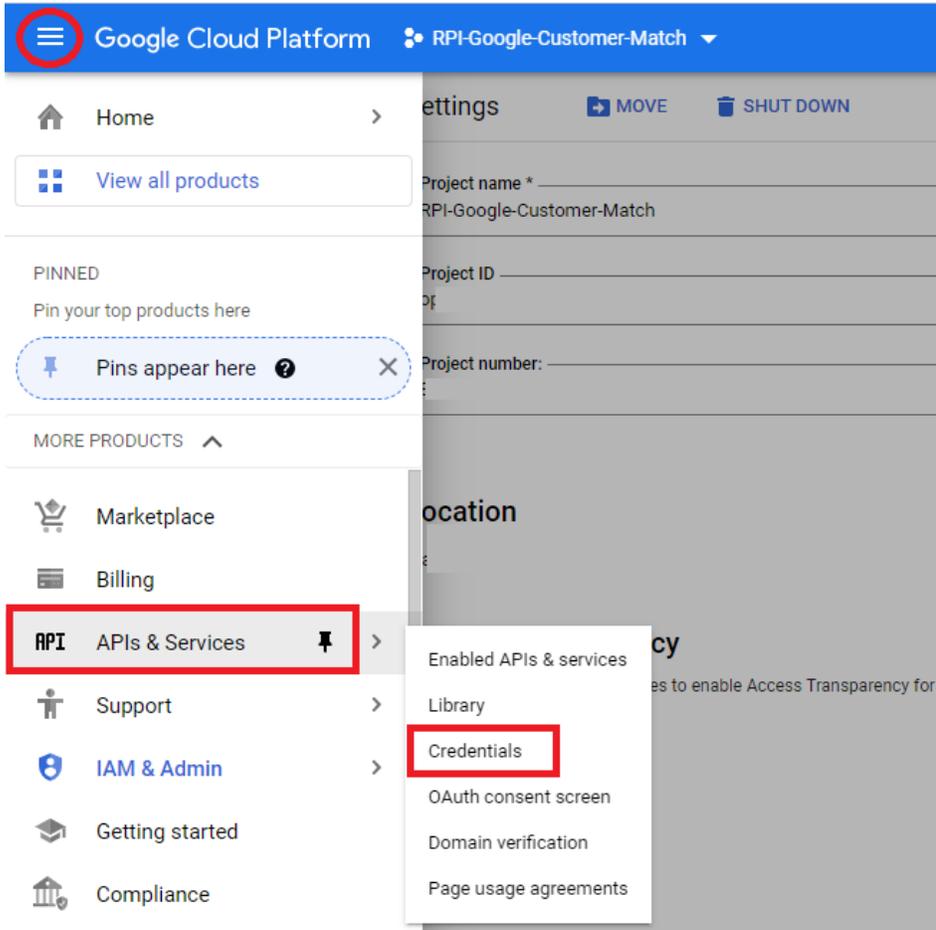
2. Once the Project has been created, click on the Project settings and note the Project ID, as that will be required for the channel configuration in RPI.



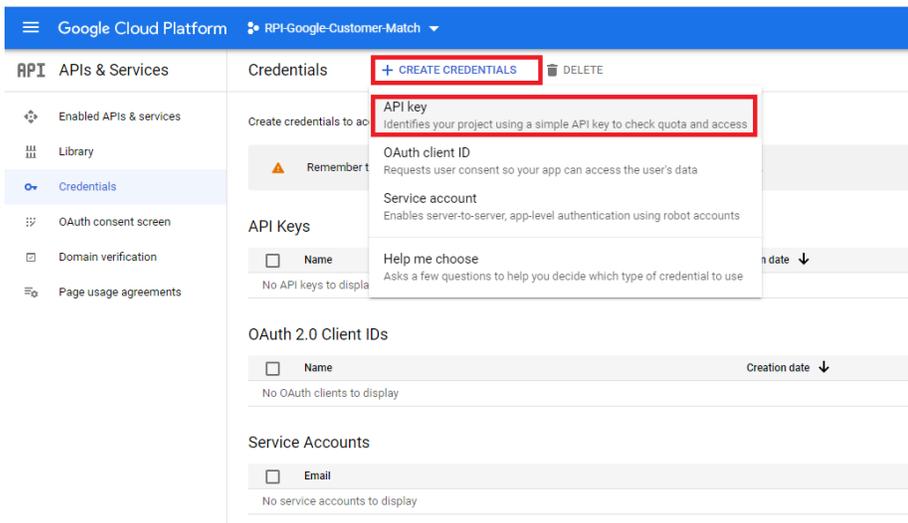
The screenshot shows the 'Settings' page for a project named 'RPI-Google-Customer-Match'. At the top, there is a blue header with the project name and a dropdown arrow. Below the header, there are three buttons: 'Settings', 'MOVE', and 'SHUT DOWN'. The form contains three main input fields: 'Project name *' with the value 'RPI-Google-Customer-Match' and a 'SAVE' button; 'Project ID' with the value 'opport' (this field is highlighted with a red border); and 'Project number:' with the value '8125'.

3.5.2 Create API and OAuth Credentials

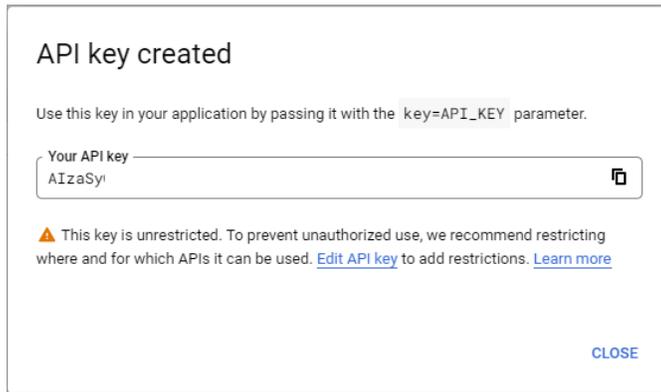
1. On the left navigation panel, click on “APIs & Services” and select “Credentials”:



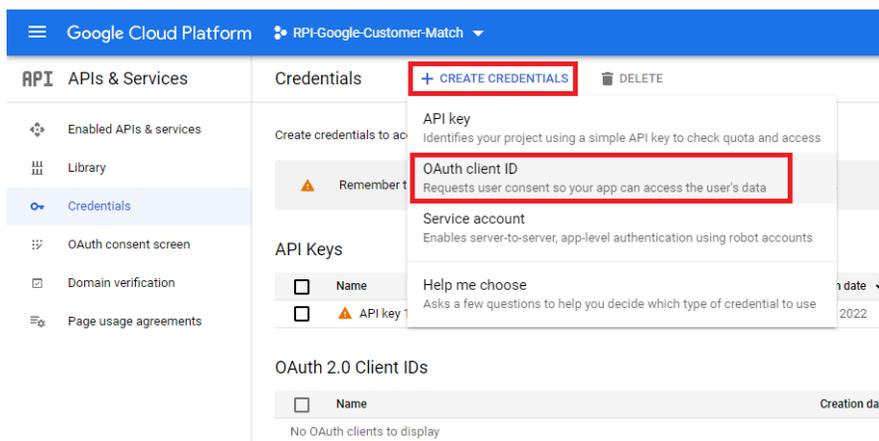
2. Click on the CREATE CREDENTIALS button and choose “API key”



- Copy the API key as that will be required for the channel configuration in RPI:

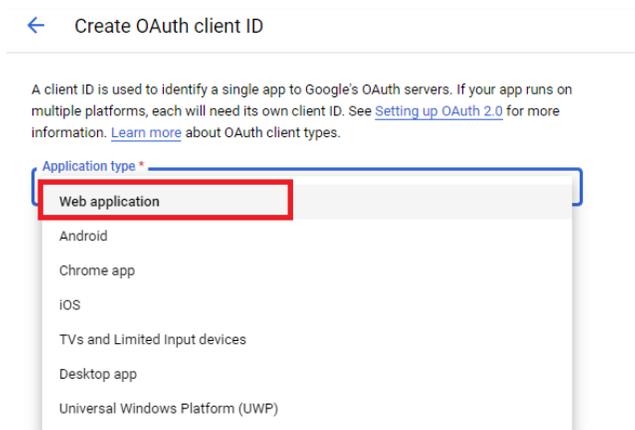


- Click the CREATE CREDENTIALS button and choose “OAuth client ID”:



NOTE: If the Project is brand new, GCP will require a configured consent screen before proceeding with this next step.

- Select “Web application” as the Application Type:



6. In the proceeding screen, enter a name for the OAuth client as well as an Authorized redirect URI, which will be used to get the token. The same URI will be entered in the channel configuration, within RPI. Hit the CREATE button once all the information has been configured:

← Create OAuth client ID

A client ID is used to identify a single app to Google's OAuth servers. If your app runs on multiple platforms, each will need its own client ID. See [Setting up OAuth 2.0](#) for more information. [Learn more](#) about OAuth client types.

Application type *
Web application

Name *
RPI Customer Match

The name of your OAuth 2.0 client. This name is only used to identify the client in the console and will not be shown to end users.

i The domains of the URIs you add below will be automatically added to your [OAuth consent screen](#) as [authorized domains](#).

Authorized JavaScript origins **?**

For use with requests from a browser

+ ADD URI

Authorized redirect URIs **?**

For use with requests from a web server

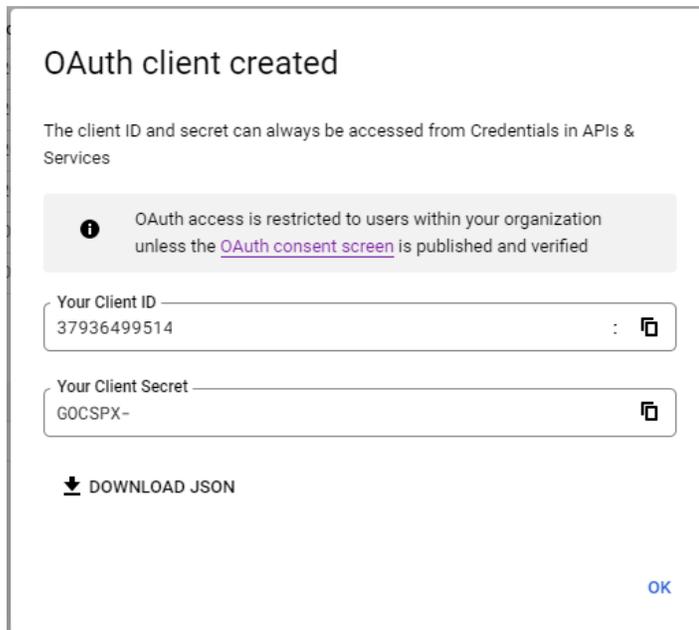
URIs 1 *
https://<any valid URL>

+ ADD URI

Note: It may take 5 minutes to a few hours for settings to take effect

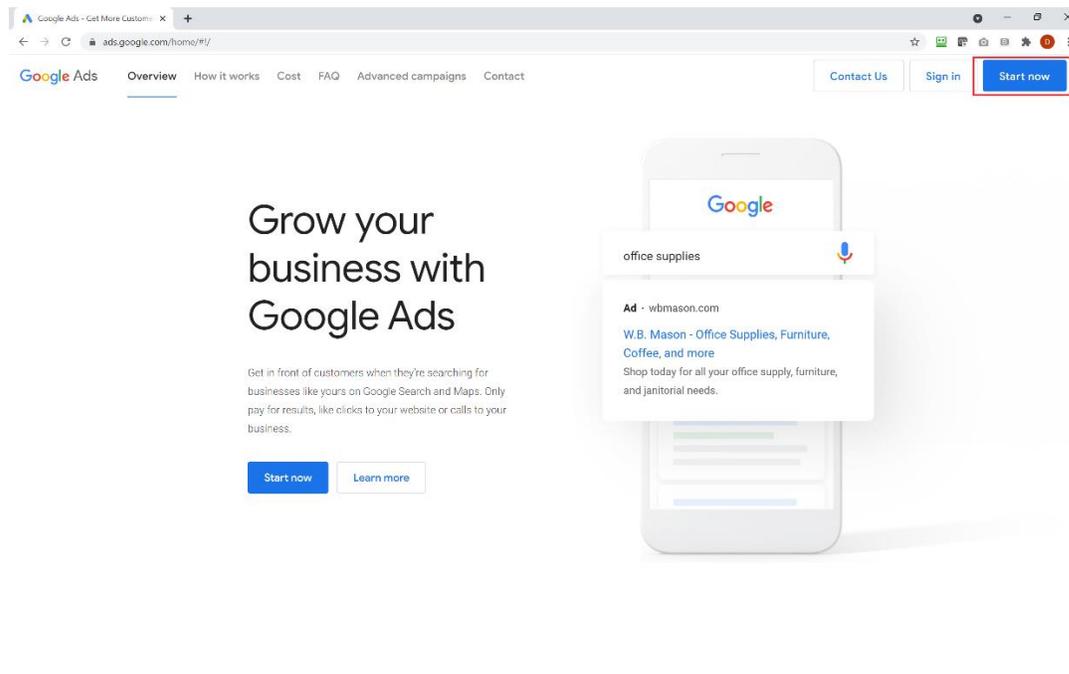
CREATE CANCEL

7. Upon clicking the CREATE button in step 6, the Client ID and Client Secret will be shown on the proceeding screen. Copy both values as they will be required for the channel configuration in RPI:

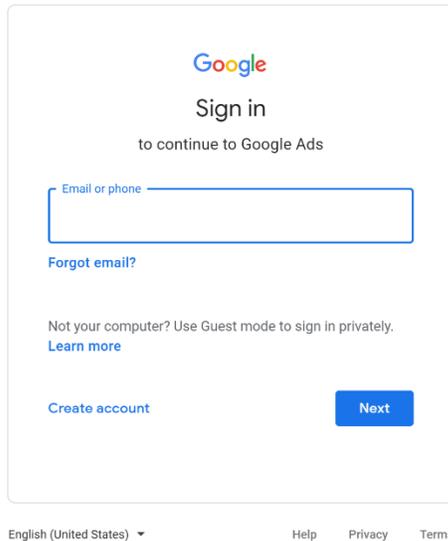


3.5.3 Create Google Ads Account

1. Visit <https://ads.google.com/> and click on the “Start now” button on the top left:

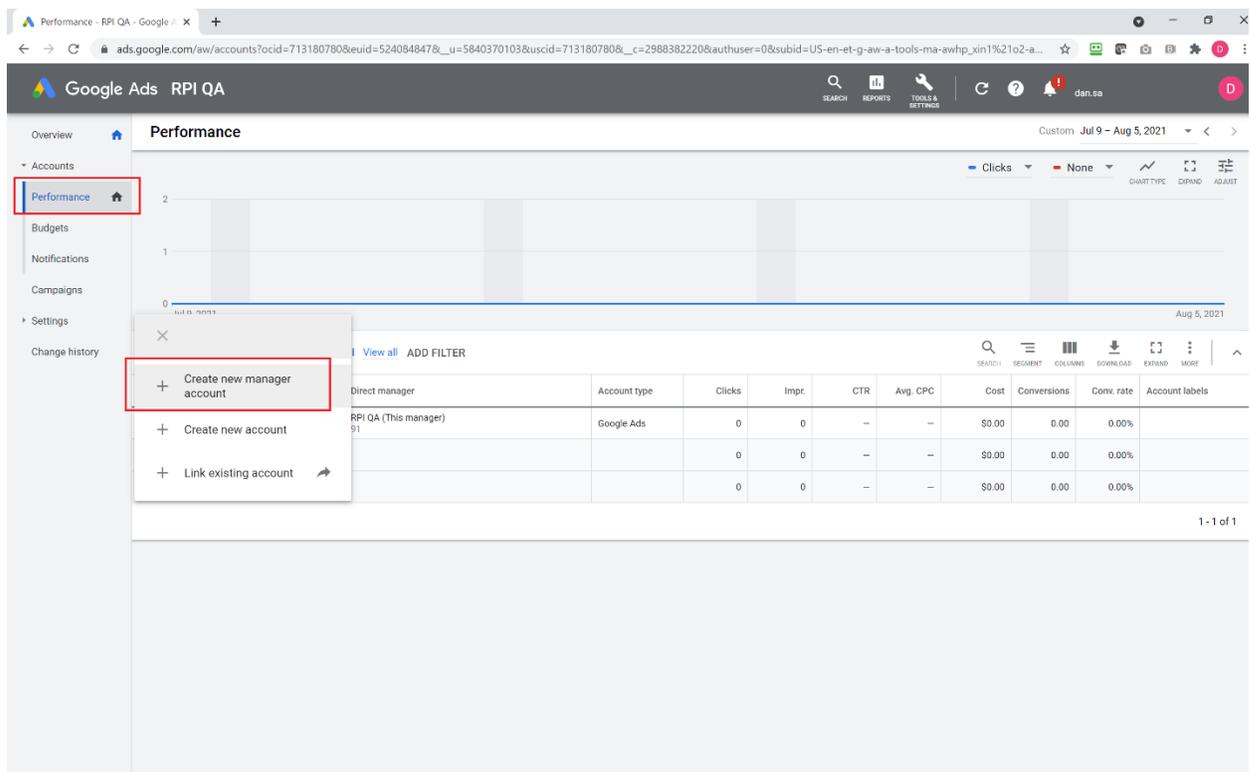


2. Sign in or create a new Google account:



The image shows the Google sign-in page. At the top is the Google logo, followed by the text "Sign in to continue to Google Ads". Below this is a text input field labeled "Email or phone". There are links for "Forgot email?", "Not your computer? Use Guest mode to sign in privately. Learn more", and "Create account". A blue "Next" button is at the bottom right. At the very bottom, there are links for "English (United States)", "Help", "Privacy", and "Terms".

3. Create a New Manager Account (if necessary) by going to Accounts > Performance and then clicking the plus button to display the option for creating a new manager account.



The screenshot shows the Google Ads Performance page. The left sidebar has a "Performance" menu item highlighted with a red box. A plus button next to it is also highlighted with a red box, which has opened a dropdown menu. This menu contains three options: "Create new manager account", "Create new account", and "Link existing account". The main content area shows a performance chart and a table of account data.

Direct manager	Account type	Clicks	Impr.	CTR	Avg. CPC	Cost	Conversions	Conv. rate	Account labels
RPI QA (This manager)	Google Ads	0	0	-	-	\$0.00	0.00	0.00%	
		0	0	-	-	\$0.00	0.00	0.00%	
		0	0	-	-	\$0.00	0.00	0.00%	

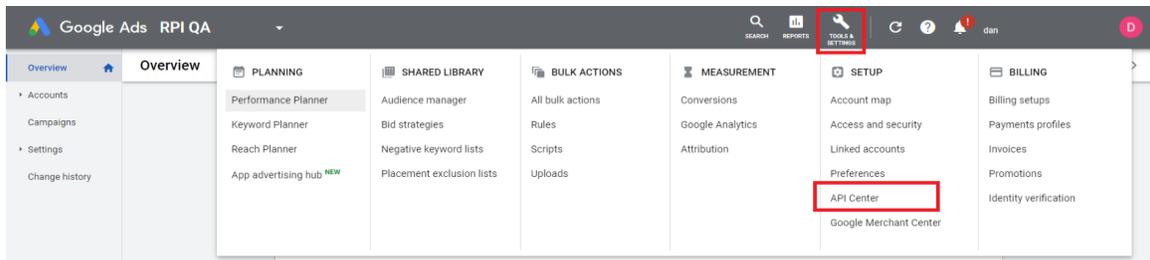
3.5.4 Enable Customer Match Feature

Important – once the account is created, or if an existing account is being used, reach out to the Google support and have them **enable the Customer Match functionality** on the account. This can only be enabled on production accounts.

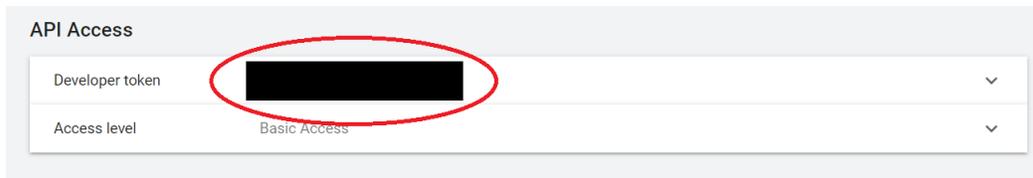
3.5.5 Locating Developer Token

The Developer Token field in the Google Ads Customer Match channel configuration can be found on the Google Ads homepage.

1. After logging in, click “Tools & Settings” from the top menu.
2. Then click “API Center” under the Setup category.

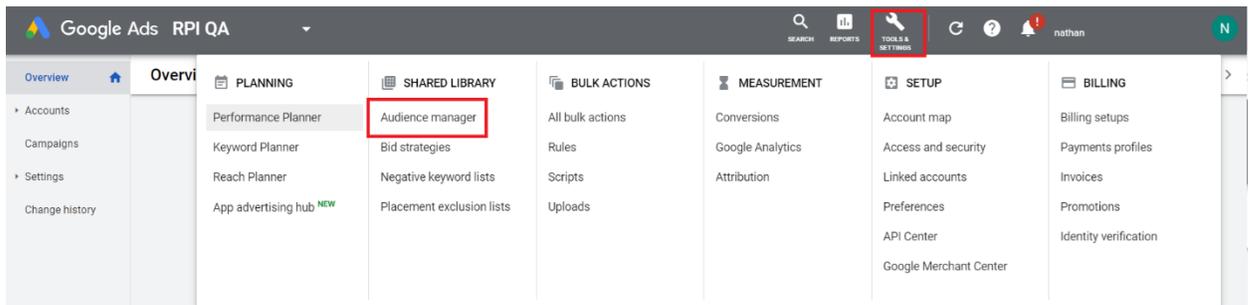


3. Copy the Developer Token to the Google Ads Customer Match channel configuration.



3.5.6 Access Audience Lists

1. To access your audience lists, click “Tools & Settings” from the top menu.
2. Click “Audience Manager” under the Shared Library category.



3. Click an audience list name to see its respective details.

Audience lists		+ ADD FILTER		Enabled audiences						
Audience insights		Audience name	Type	Membership status	Size: Search	Size: YouTube	Size: Display	Size: Gmail campaign	Match rate	Creation date
Audience sources		<input type="checkbox"/> Customer Match list# 131778d9 A list of customers that originated from email and physical addresses	Customer list Customer contact information	Open	<100 Too small to serve	--	Jul 17, 2021			
		<input type="checkbox"/> Customer Match list# da482f90 A list of customers that originated from email and physical addresses	Customer list Customer contact information	Open	<100 Too small to serve	--	Jul 17, 2021			
		<input type="checkbox"/> Customer Match list# 7961efc8 A list of customers that originated from email and physical addresses	Customer list Customer contact information	Open	<100 Too small to serve	--	Jul 17, 2021			
		<input type="checkbox"/> Customer Match list# daa2988e A list of customers that originated from email and physical addresses	Customer list Customer contact information	Open	<100 Too small to serve	--	Jul 17, 2021			
		<input type="checkbox"/> Customer Match list# d985d756 A list of customers that originated from email and physical addresses	Customer list Customer contact information	Open	<100 Too small to serve	--	Jul 9, 2021			
		<input type="checkbox"/> Customer Match list# e084c782 A list of customers that originated from email and physical addresses	Customer list Customer contact information	Open	<100 Too small to serve	--	Jul 9, 2021			

Audience lists > **Customer Match list# 131778d9** ✕

Customer list

Customer Match list# 131778d9

A list of customers that originated from email and physical addresses

Membership: **Open** (30 days) Creation date: Jul 17, 2021 List ID: 6770471932

List members Customers based on email, phone, and/or mailing address uploads (1 upload) Ⓜ

Date	File name	Operation	Match rate	Source	Status
Jul 17, 2021 9:45:59 PM	uploaded_using_api	Add	--	Google Ads API	Success

Show rows: 10 1 - 1 of 1 < >

Eligibility ✓ Search ✓ YouTube ✓ Display ✓ Gmail + 4 more

Size: Search	Size: YouTube	Size: Display	Size: Gmail
0	0	0	0

4. Additional information is displayed as more records are processed within the audience list (e.g., Match rate.)

Match rate

0% of people in your customer list were identified for targeting purposes.

0% is low

0% 29% 62% 100%

Match rate is the percentage of people in your customer list that Google Ads can identify for targeting purposes.

Most advertisers' match rates are between 29% and 62%. To improve your match rate, make sure you're formatting and encrypting your list properly. [Learn more](#)

Per Google, it may take up to 24 hours for the customer match to complete.

3.6 Yahoo! Japan – Data Onboarding

3.6.1 Create Yahoo! Japan Account

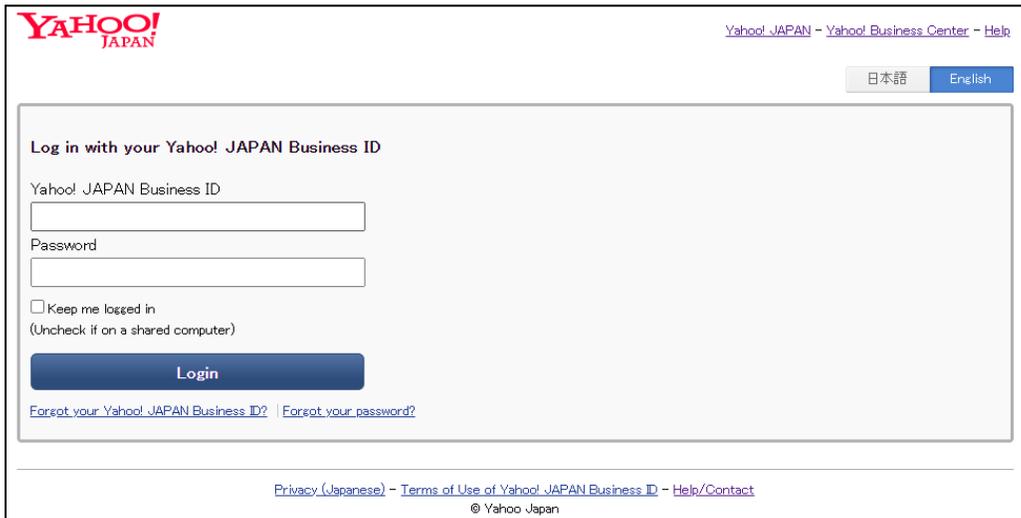
This section shows how to acquire and manage a Yahoo! Japan Business account. You may skip steps #1-2 if a Yahoo! Japan Business account has already been provisioned.

1. To provision a new Yahoo! Japan Business account, please navigate to <https://support.yahoo-net.jp/PccBizmanager/s/>.
2. In the Help/Contact page. Find “Registration or change of payment method”. Click “Show all” and follow the steps provided.

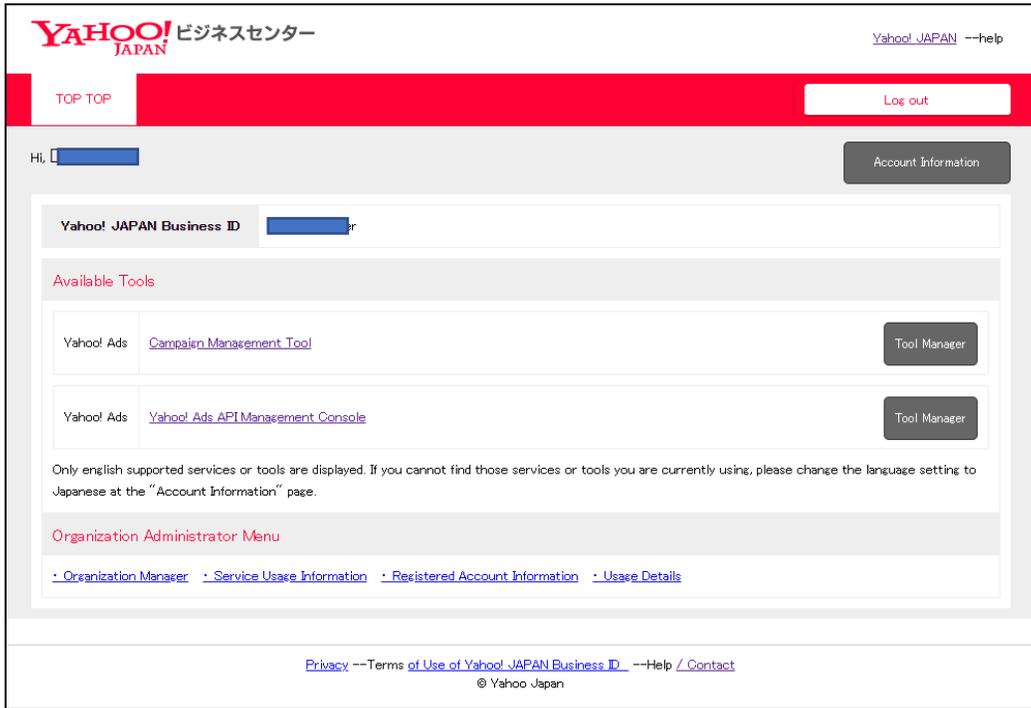


3.6.2 Create oAuth Application

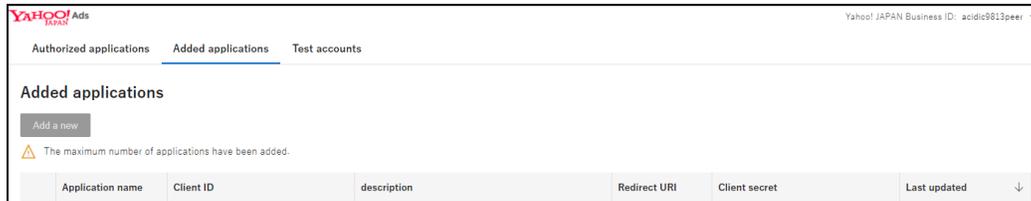
3. Login to your Yahoo! Japan Business account by navigating <https://login.bizmanager.yahoo.co.jp/> in your web browser.
4. In the login page, provide the Business ID and password.



5. Upon successful login, click “Yahoo! Ads API Management Console” to create a new oAuth application, which is required to interact with their APIs.



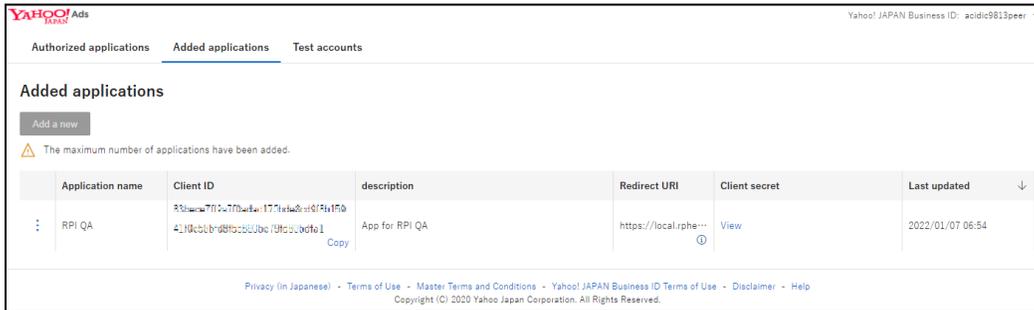
6. Within the “Added applications” tab, click the “Add a new” button and follow the steps provided.



3.6.3 Retrieve OAuth Application Credentials

7. Once the OAuth application has been created, the following application details will need to be noted for Step 8:

Client ID
Client secret
Redirect URI

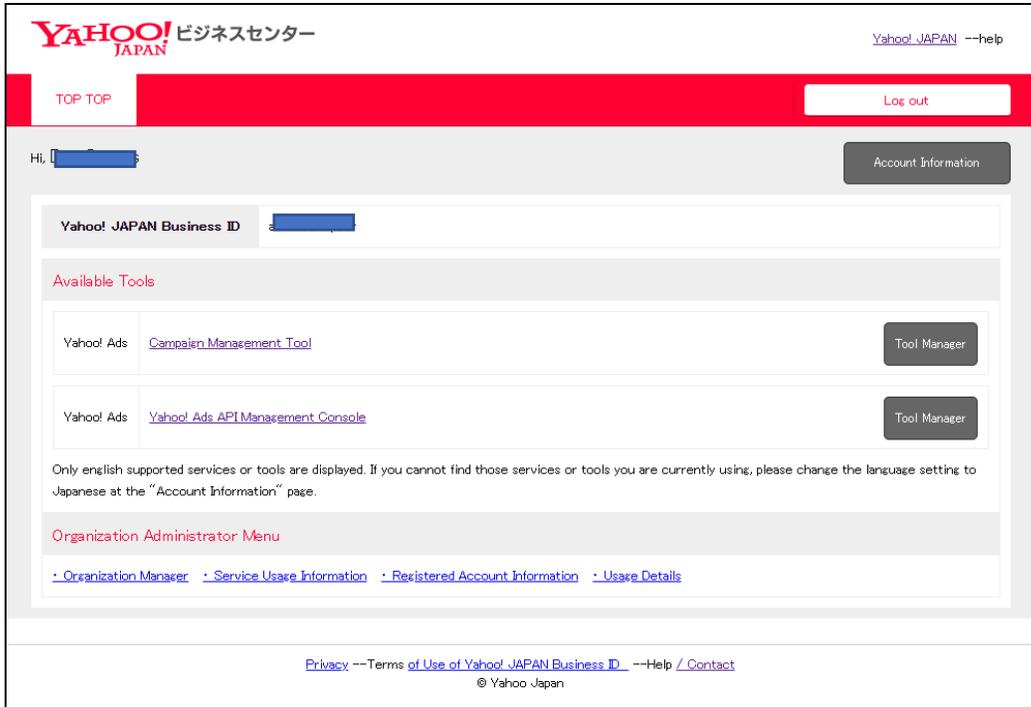


8. Using the values captured in Step 7, create new Yahoo! Japan channel data connector within Redpoint Interaction and paste the values of Client ID, Client secret and Redirect URI in the channel configuration.

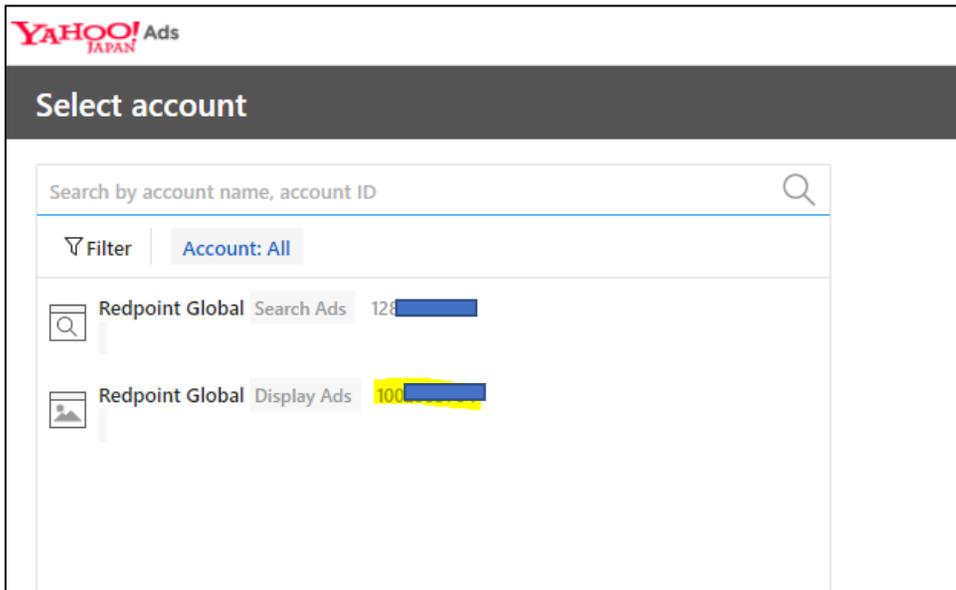
Client ID:	<input type="text"/>	Client ID used to connect to Yahoo! service
Client secret:	<input type="text"/>	Client secret used to connect to Yahoo! service
Redirect URL:	<input type="text"/>	Redirect URL used to connect to Yahoo! service

3.6.4 Retrieve Yahoo! Japan Account Id

9. To retrieve the value of "Account ID", click "Campaign Management Tool". If you have not yet created an Account, please proceed to step #11.



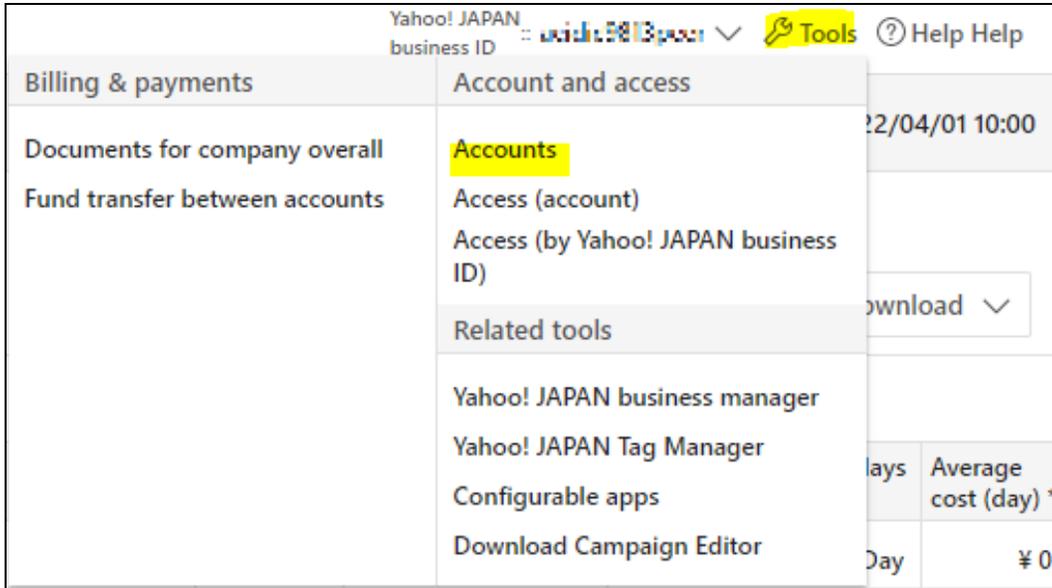
10. In the "Select account" page, you will find the "Account ID" within the Display Ads account.



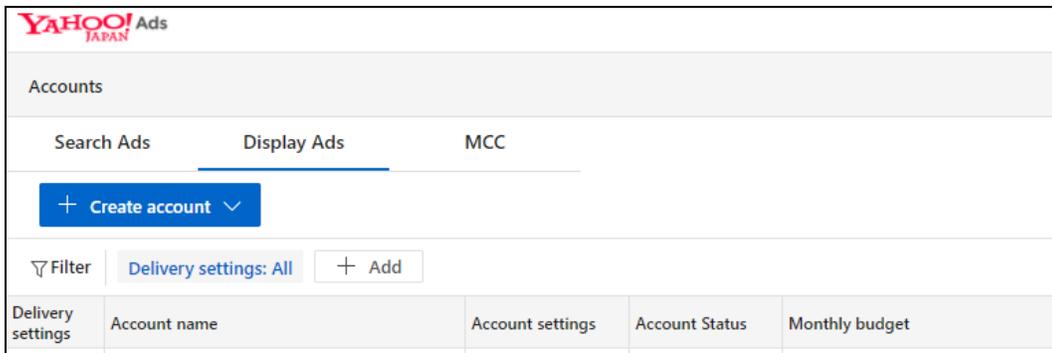
Capture this value for use when creating new Yahoo! Japan channel data connector in RPI.

3.6.5 Create New Yahoo! Japan Ads Account

- To create a new Yahoo! Ads account, click “Tools” menu on the upper right corner of the main page and click “Accounts”.



- Click Display Ads tab and click Create account button. Follow the steps provided within the portal for creating a new account.



4 CRM Configuration

4.1 Microsoft Dynamics 365 Configuration

4.1.1 Provisioning a Microsoft Dynamics 365 Trial Account

The configuration specified in this section will cover the provisioning of a trial account for Microsoft Dynamics 365. If a trial or full account has already been provisioned, then skip to section 4.1.2

Note: if an existing Microsoft Online account is being used to sign up for a trial Microsoft Dynamics 365 account, then skip steps 1 to 11.

1. To create new trial version of Microsoft Online account, navigate to https://signup.microsoft.com/get-started/signup?OfferId=bd569279-37f5-4f5c-99d0-425873bb9a4b&dl=DYN365_ENTERPRISE_PLAN1&Culture=en-us&Country=us&flight=AdminOnCustomization&ali=1&products=bd569279-37f5-4f5c-99d0-425873bb9a4b
2. Provide an email address and click Next:

You've selected Dynamics 365 Customer Engagement Plan Trial

1 Let's get you started

Enter your work or school email address, we'll check if you need to create a new account for Dynamics 365 Customer Engagement Plan Trial.

Email

This is required

Next

2 Tell us about yourself

3 How you'll sign in

4 Confirmation details

3. Click Setup account to create new account.

You've selected Dynamics 365 Customer Engagement Plan Trial

1 Let's get you started

Looks like you need to create a new account. Let's get you started!
Continue as **testjbtwo@yahoo.com**. Not you?

Set up account

2 Tell us about yourself

3 How you'll sign in

4 Confirmation details

4. Provide all required details for the new account and click Next.

You've selected Dynamics 365 Customer Engagement Plan Trial

- 1 Let's get you started
- 2 Tell us about yourself
- 3 How you'll sign in
- 4 Confirmation details

First name Middle name (Optional) Last name

Business phone number

Company name Company size

Country or Region

5. Provide a valid mobile number where to send the verification code.

You've selected Dynamics 365 Customer Engagement Plan Trial

- 1 Let's get you started
- 2 Tell us about yourself
- 3 How you'll sign in
- 4 Confirmation details

A text or phone call helps us make sure this is you.
Enter a number that isn't VoIP or toll free.

Text me
 Call me

Country code Phone number

We don't save this phone number or use it for any other purpose.

6. Upon receiving the verification code, enter the respective code and click Verify:

You've selected Dynamics 365 Customer Engagement Plan Trial

- 1 Let's get you started
- 2 Tell us about yourself
- 3 How you'll sign in
- 4 Confirmation details

A text or phone call helps us make sure this is you.
Enter a number that isn't VoIP or toll free.

Text me
 Call me

Country code Phone number

We don't save this phone number or use it for any other purpose.

Enter your verification code

Didn't get it or need a new code? [Try again.](#)

7. Once successfully verification, provide all required details for the new credentials, and click Next.

You've selected Dynamics 365 Customer Engagement Plan Trial

- Let's get you started
- Tell us about yourself
- How you'll sign in**
- Confirmation details

This username is what you'll use to sign in each time you use your apps. The domain name is a suggestion. You can change your domain now, or later at any time with your own custom domain.

Username Domain name Save

Password

Confirm password

By selecting **Next**, you agree to our [trial agreement](#).

I understand that Microsoft may contact me about my trial.

I would like information, tips, and offers about Solutions for Businesses and Organizations, and other Microsoft products and services. [Privacy Statement](#).

I would like Microsoft to share my information with select partners so I can receive relevant information about their products and services. To learn more, view the [Privacy Statement](#).

Next

8. Upon seeing the confirmation details, the trial account is ready to be used:

You've selected Dynamics 365 Customer Engagement Plan Trial

- Let's get you started
- Tell us about yourself
- How you'll sign in
- Confirmation details**

● ● ● ●

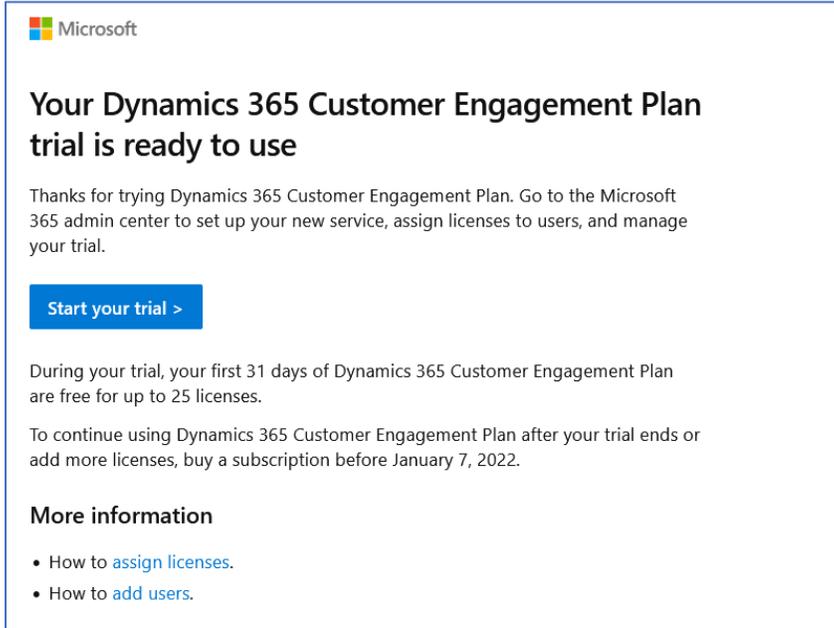
Thanks for signing up for Dynamics 365 Customer Engagement Plan Trial

Your username is **rpidev@rpidev20**

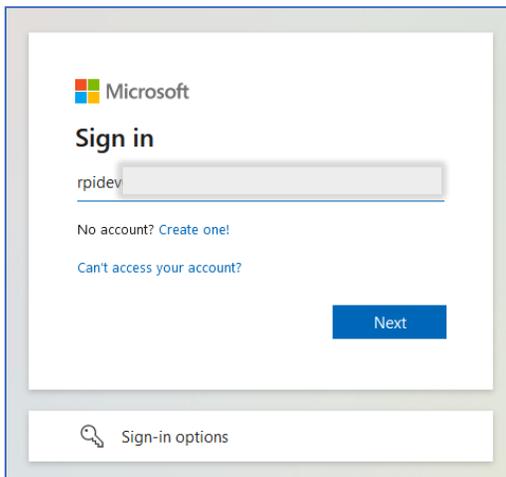
We've sent a confirmation email to

Get Started

9. Open the Confirmation email and click the “Start your trial” button:

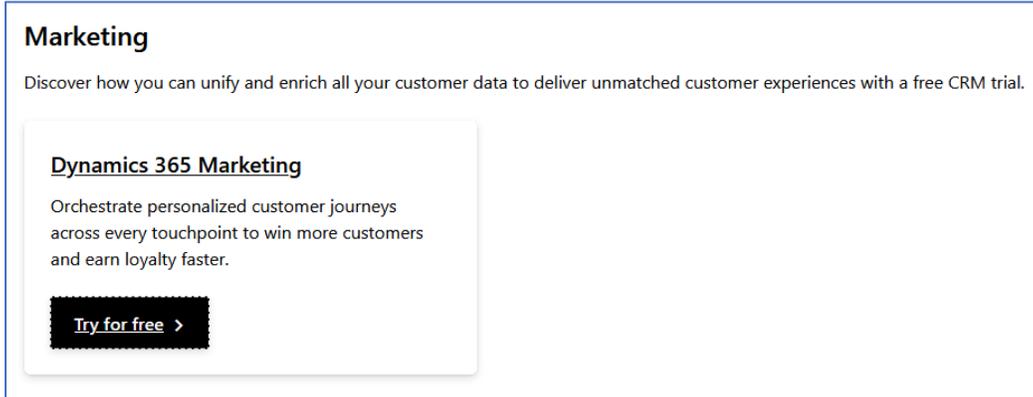


10. Provide your Microsoft Online account and click the “Next” button:



11. Enter your Microsoft Online password and click the “Next” button again.
12. Upon successful login with the Microsoft Online account, use the same email address to provision new Microsoft Dynamics 365 trial account by navigating to:
<https://trials.dynamics.com/Dynamics365/Signup/>

13. In the Marketing section, click Try for free.



Marketing

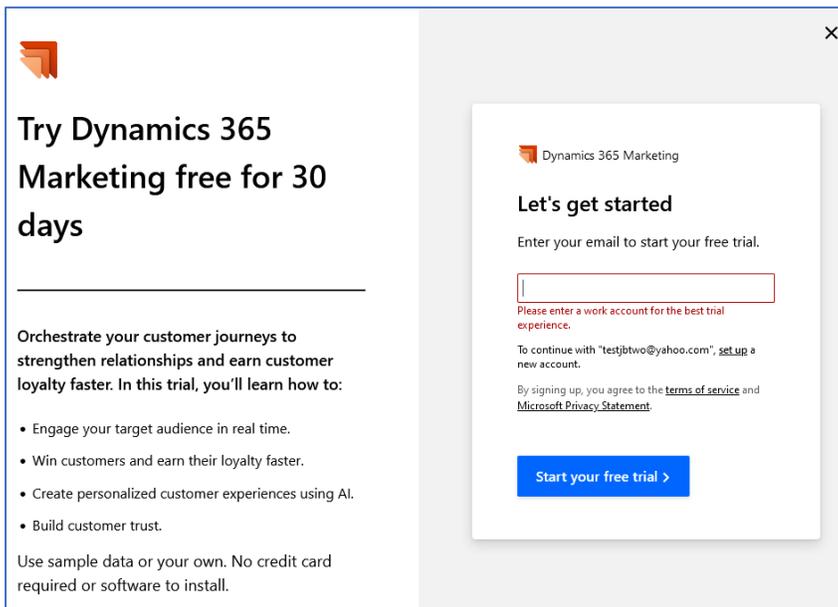
Discover how you can unify and enrich all your customer data to deliver unmatched customer experiences with a free CRM trial.

Dynamics 365 Marketing

Orchestrate personalized customer journeys across every touchpoint to win more customers and earn loyalty faster.

[Try for free >](#)

14. Enter your Microsoft Online email address and click the “Start your free trial” button.



Try Dynamics 365 Marketing free for 30 days

Orchestrate your customer journeys to strengthen relationships and earn customer loyalty faster. In this trial, you'll learn how to:

- Engage your target audience in real time.
- Win customers and earn their loyalty faster.
- Create personalized customer experiences using AI.
- Build customer trust.

Use sample data or your own. No credit card required or software to install.

Let's get started

Enter your email to start your free trial.

Please enter a work account for the best trial experience.

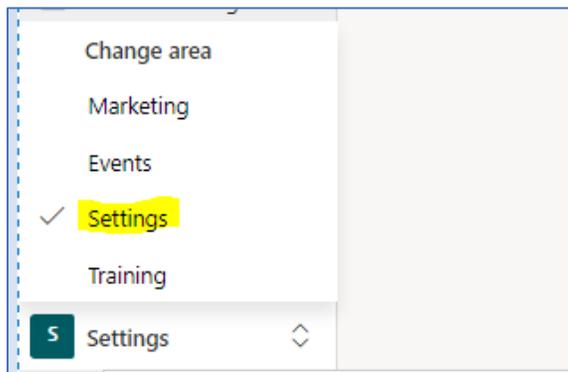
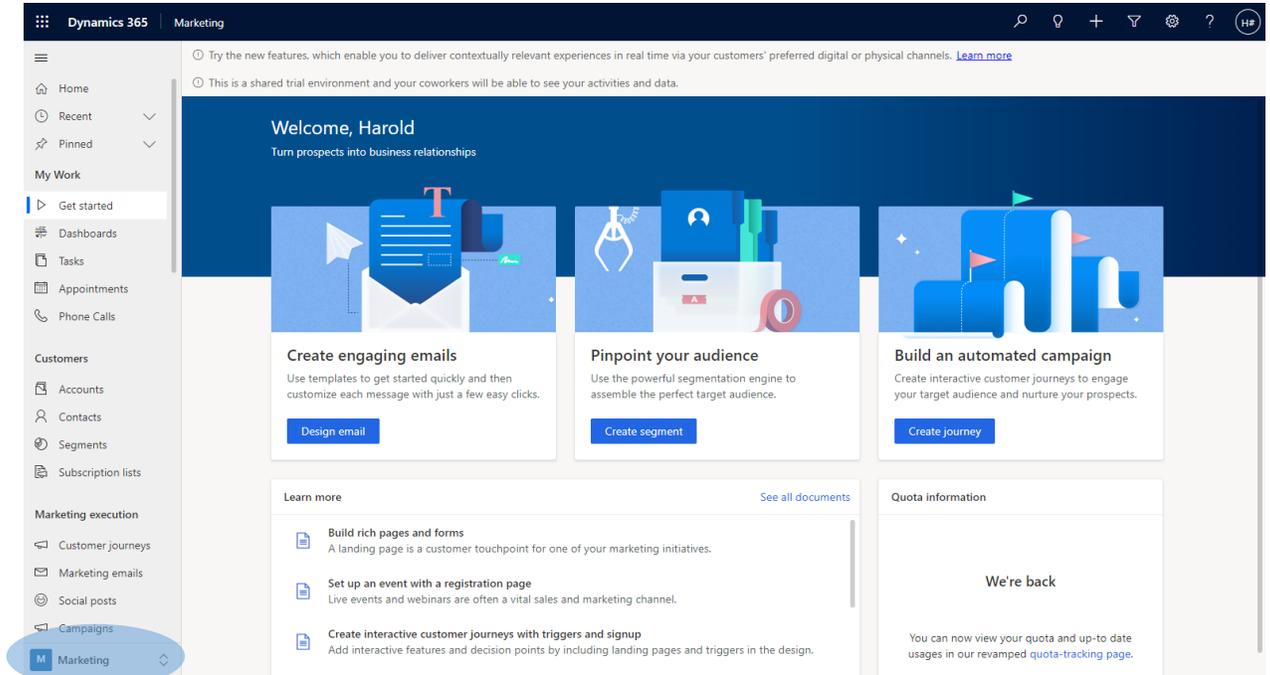
To continue with "testjbtwo@yahoo.com", [set up](#) a new account.

By signing up, you agree to the [terms of service](#) and [Microsoft Privacy Statement](#).

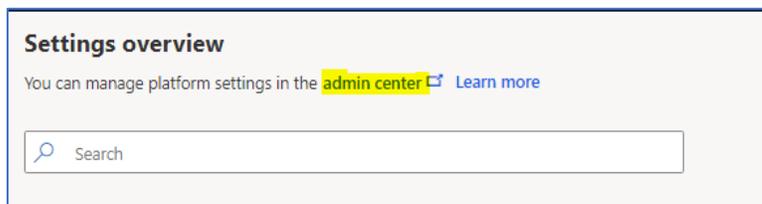
[Start your free trial >](#)

4.1.2 Configuring Microsoft Dynamics 365

15. Upon signing up for the trial account, or logging into an existing account, retrieve the Microsoft Dynamics server URL by clicking on Settings, located on the bottom left corner:

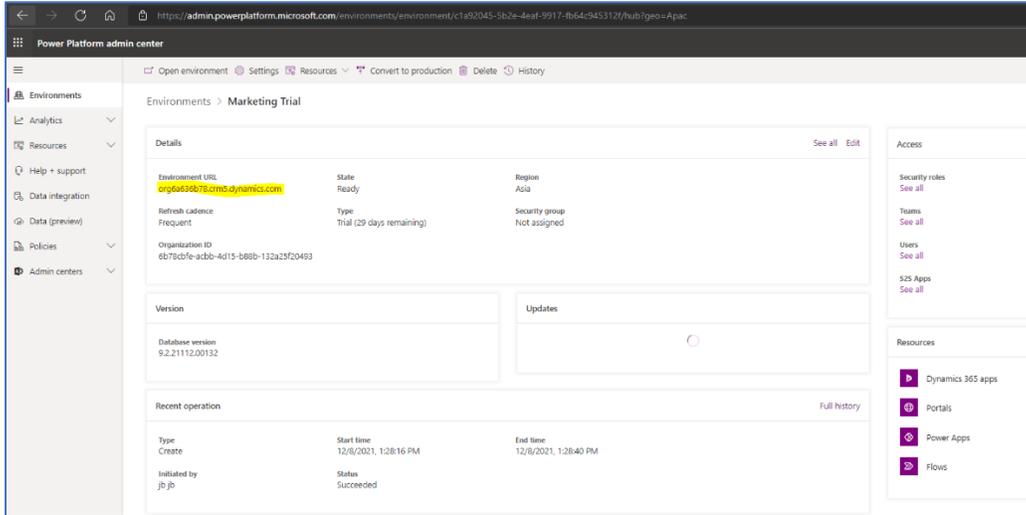


16. From the Settings page, click the "admin center" link, located at the top of the page:



- From the Admin Center default page, copy the value for “Environment URL” and paste it to the “Server URL” textbox in the Microsoft Dynamics CRM channel configuration, within RPI.

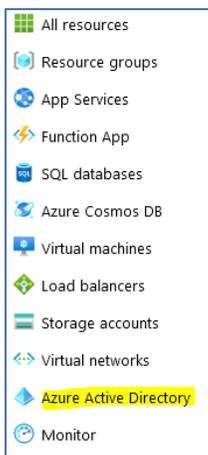
The Server URL must be a valid fully qualified URL format e.g., <https://< Environment URL>>:



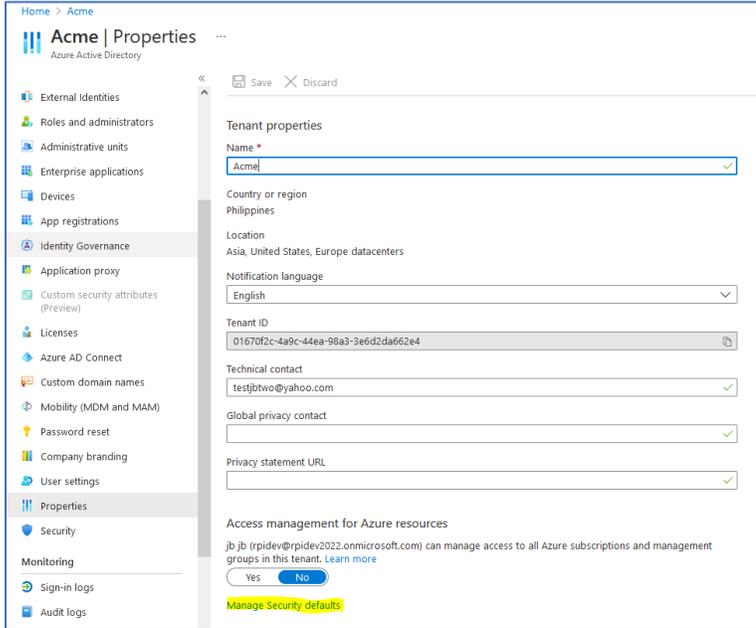
4.1.3 Enabling OAuth 2.0 for Existing Microsoft Dynamics CRM channels

OAuth 2.0 authentication is enabled by default when provisioning new Microsoft Dynamics CRM. To resolve the error “*You are using Ws-Trust authentication which has been deprecated and no longer supported in your environment. Please use OAuth2.0 authentication*” on an existing Microsoft Dynamics CRM channel connector, please follow steps below:

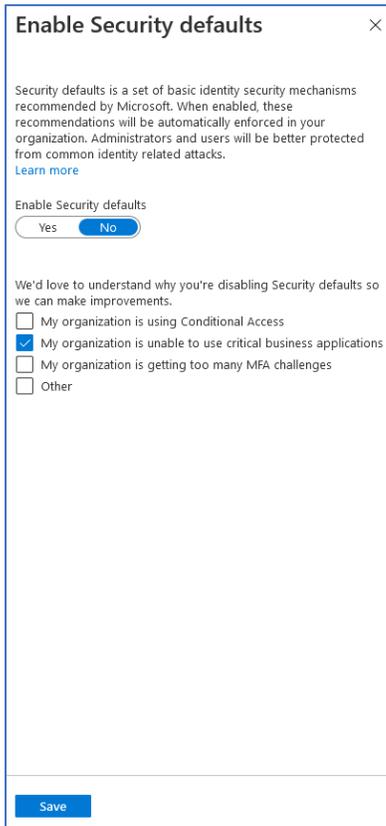
- Log in to <https://portal.azure.com/> using your Microsoft Online credentials.
- Click Azure Active Directory



20. On Properties tab, click Manage Security defaults



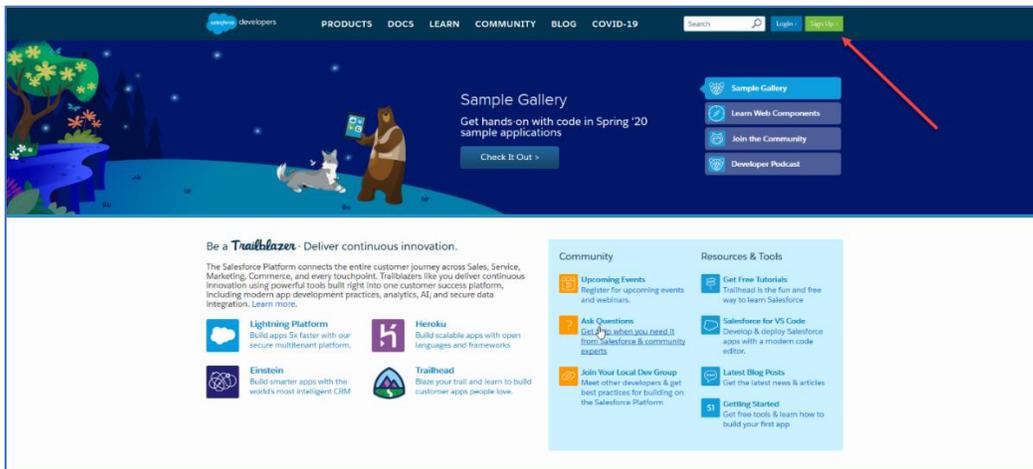
21. In Manage Security default page, toggle “Enable Security defaults” to No. Click Save.



4.2 Salesforce.com Configuration

This section describes how to create and configure Salesforce.com. Please follow the steps below:

1. In a web browser, navigate to <https://developer.salesforce.com/> and click *Sign Up*.



2. Complete the required details and click the *Sign me up* button.

A screenshot of the Salesforce Developer Edition sign-up form. The form is titled 'Get your very own Developer Edition' and 'A full-featured copy of Lightning Platform, for FREE.' It contains several input fields: Name (with a dropdown), Email, Role (with a dropdown set to 'IT Manager/Executive'), Company, Country (with a dropdown set to 'Philippines'), Postal Code, and Username. Below the fields is a checkbox for 'By registering, you confirm you have read and agree to the Terms of Use and the Master Subscription Agreement and agree that my data is subject to the Privacy Statement, including use for marketing purposes.' A red arrow points to the 'Sign me up >' button at the bottom.

3. Check your email for a 'verify account' email, and click the link therein.
4. Complete the required fields to Change Your Password and click Change Password.

Change Your Password

Enter a new password for [REDACTED]
 [REDACTED] Your password must have at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

 Go

* Confirm New Password

 Match

Security Question

▼ In what city were you born?

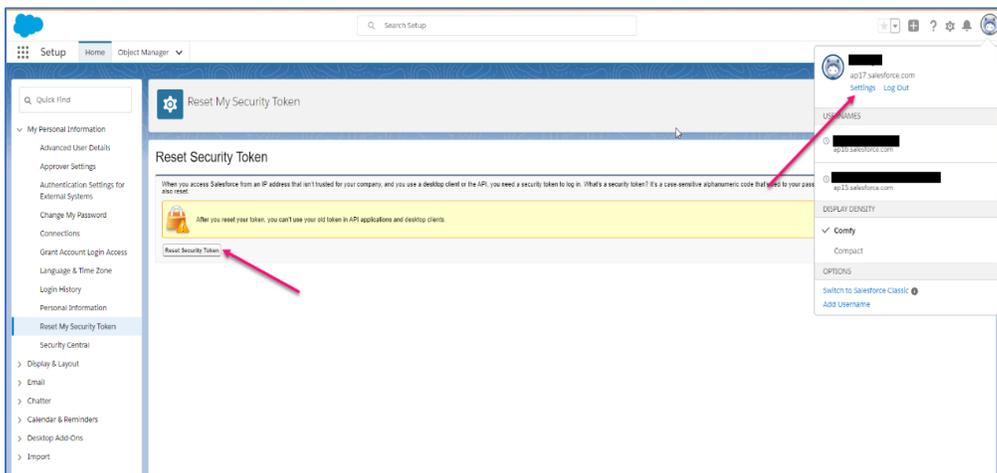
* Answer

[Change Password](#)

5. After setup is complete, you will be redirected to a new Salesforce trial.

6. To locate the *Security token* please follow the following steps:

- Go to *View profile*
- Click *Settings*
- Collapse *My Personal Information*
- Click *Reset My Security Token*
- Check your *Email* and copy *Security token*



5 Email Service Provider Configuration

5.1 Data Management Email Results Mechanism

The Data Management (RPDM) Email Results Mechanism can be used to retrieve email results for the following Email Service Providers (ESPs):

- CheetahMail
- Salesforce Marketing Cloud
- SendGrid
- Acoustic
- SmartSource

A tailored RPDM project for each ESP can be found in the following deployment files location:

DeploymentFiles\DataManagement Macros\Channel Synch Loads

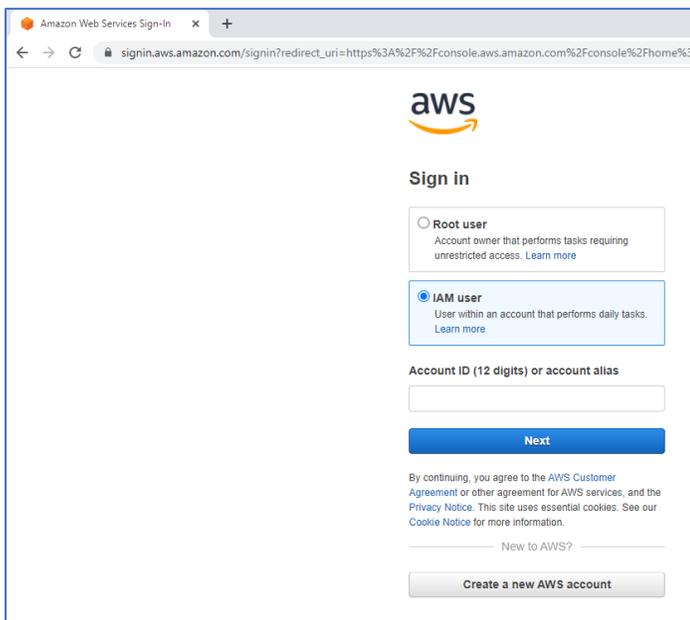
The project needs to be loaded into an instance of RPDM for the Mechanism to function.

5.2 Amazon Pinpoint Email Configuration

This section describes how to create and configure Amazon Pinpoint Email project in Amazon Web Services (AWS). Assuming you have already an Amazon Web Services account, please follow the steps below.

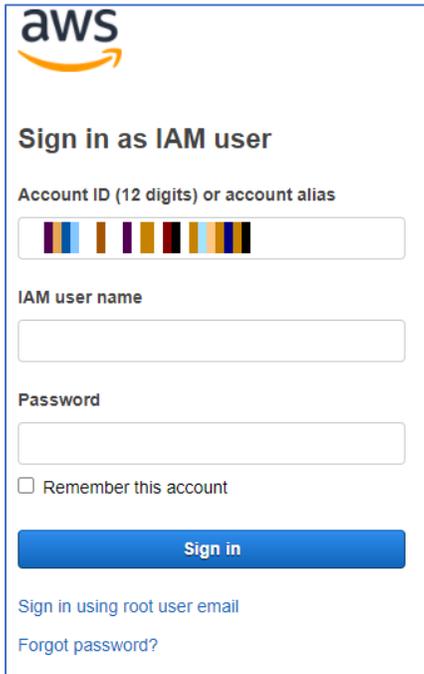
5.2.1 Creating new Amazon Pinpoint Email project

1. Log into your Amazon Web Services management console by navigating to <https://console.aws.amazon.com/iam/>
2. Select IAM User option and provide your Account ID or account alias. Click Next.



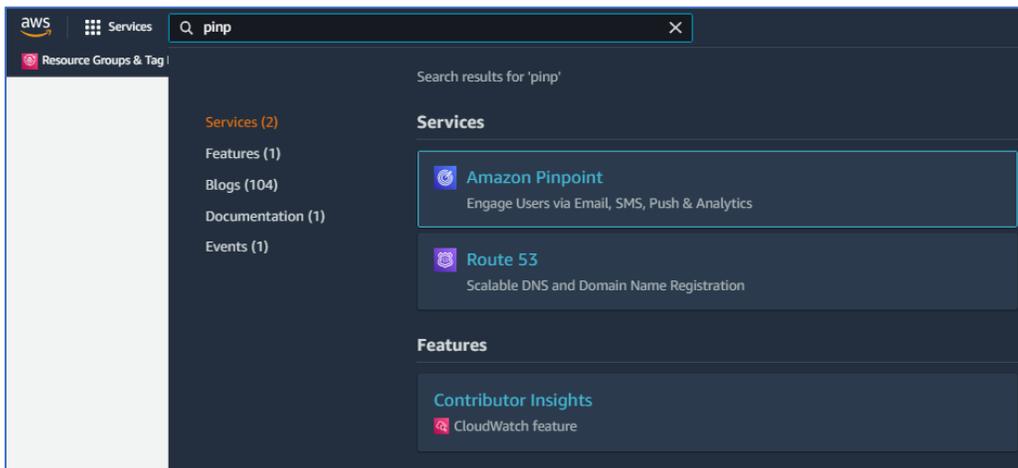
The screenshot shows the AWS Sign-In page in a browser. The page features the AWS logo at the top, followed by the text "Sign in". Below this, there are two radio button options: "Root user" (unselected) and "IAM user" (selected). The "IAM user" option is highlighted with a blue border. Below the options is a text input field labeled "Account ID (12 digits) or account alias". A blue "Next" button is positioned below the input field. At the bottom of the page, there is a disclaimer: "By continuing, you agree to the AWS Customer Agreement or other agreement for AWS services, and the Privacy Notice. This site uses essential cookies. See our Cookie Notice for more information." Below the disclaimer is a "New to AWS?" link and a "Create a new AWS account" button.

3. Provide your IAM username and password. Click Sign in.



The image shows the AWS IAM user sign-in page. At the top left is the AWS logo. Below it is the heading "Sign in as IAM user". There are three input fields: "Account ID (12 digits) or account alias" with a color-coded bar above it, "IAM user name", and "Password". Below the password field is a checkbox labeled "Remember this account". A blue "Sign in" button is at the bottom. Below the button are two links: "Sign in using root user email" and "Forgot password?".

4. Once you have logged in successfully, you will be redirected to AWS management console. In the services search box, look for Amazon Pinpoint. Click **Amazon Pinpoint**.



5. If you are using an existing Amazon Pinpoint project, proceed to section 5.2.2.

- You will now be redirected to Amazon Pinpoint management console. To create a new project, enter the project name and click **Create a project**.

Get started

To get started with Amazon Pinpoint, create a project.

Project name

Create a project

- In the Configure features page, configure Email. Click **Configure** button.

Configure features

Choose a feature to add to your project. You can add more features later.

Project features

Messaging channels and response metrics

Email
Send personalized email messages to your customers. [Info](#)
Configure

SMS
Send SMS text messages from shared or reserved phone numbers. [Info](#)
Configure

Push notifications
Send push notifications to users of your mobile apps. [Info](#)
Configure

Application analytics

Mobile app analytics
Track usage metrics for mobile applications. [Info](#)
Configure

Web app analytics
Track usage metrics for web-based applications. [Info](#)
Configure

- Select *Enable the email channel for this project* option. You may leave other settings as it is. Click **Save** changes.

Identity details

Before you can use Amazon Pinpoint to send email, you have to verify an email identity. An *identity* can be either an email address or a domain. When you verify a domain, you can send email from any email address on that domain.

Enable the email channel for this project

Identity type

Email address
Verify a single email address. When you verify a new address, we send you an email. You have to click the link in this email to show that you own the address.

Domain
Verify an entire domain. When you verify a new domain, we provide a set of DNS records. You have to add these records to the DNS configuration of the domain.

Use an existing email address
 Verify a new email address

Default sender address

Enabled for sending **▼** **↻**

Friendly sender name - *optional*
A user-friendly name that is displayed to customers who receive your email. [Info](#)

example: Hello from Business Name!

Feedback forwarding

When you enable this option, Amazon Pinpoint sends bounce and complaint notifications to the identity you chose above. You have to use a method of tracking bounces and complaints. If you disable feedback forwarding, you have to create an Event Stream for bounce and complaint events.

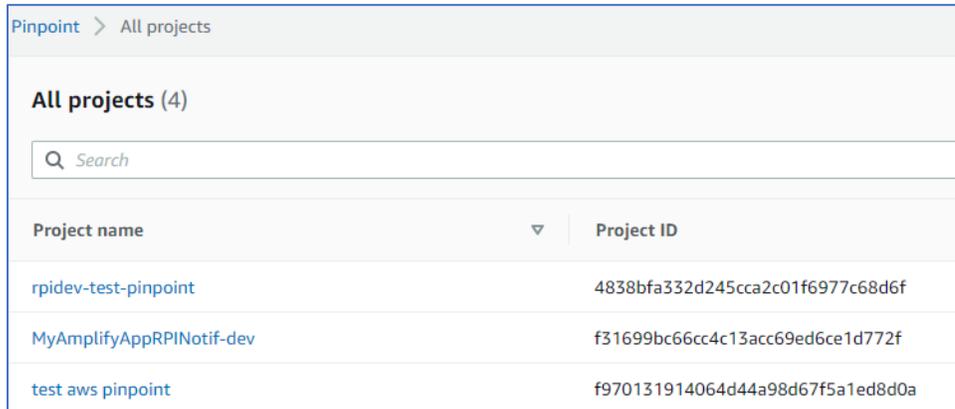
On

i When you enable the email channel for a project, Amazon Pinpoint automatically attaches an authorization policy named `identity_policy_pinpoint` to the email identity you chose for this project. **View policy**

Return to email settings **Save**

5.2.2 Enabling Amazon Pinpoint Email on existing project

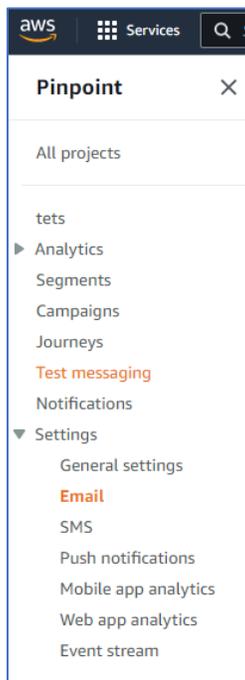
1. To enable Amazon Pinpoint Email on existing Pinpoint project, select your Pinpoint project from the **All projects** list, as shown in the image below.



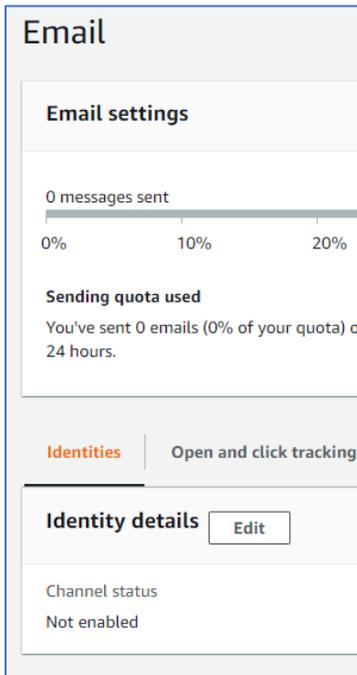
The screenshot shows the Amazon Pinpoint console interface. At the top, there is a breadcrumb navigation path: "Pinpoint > All projects". Below this, the heading "All projects (4)" is displayed. A search bar with the placeholder text "Search" is present. The main content is a table with two columns: "Project name" and "Project ID".

Project name	Project ID
rpidev-test-pinpoint	4838bfa332d245cca2c01f6977c68d6f
MyAmplifyAppRPINotif-dev	f31699bc66cc4c13acc69ed6ce1d772f
test aws pinpoint	f970131914064d44a98d67f5a1ed8d0a

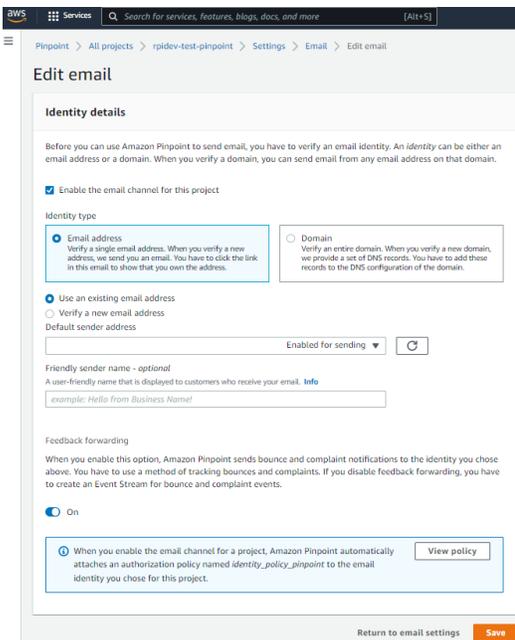
2. Expand Settings menu from the left pane and click Email.



3. In the Identities tab, click Edit.



4. In the Edit email page, select *Enable the email channel for this project* option. You may leave other settings as it is. Click Save changes.



5.2.3 Create Pinpoint import Segment ARN role

Please navigate and follow the steps provided the links below.

https://docs.aws.amazon.com/IAM/latest/UserGuide/id_roles_create_for-service.html

<https://docs.aws.amazon.com/pinpoint/latest/developerguide/permissions-import-segment.html#permissions-import-segment-trustpolicy>

The Pinpoint Segment ARN role name will be used in Redpoint Interaction (RPI) Amazon Pinpoint Email connector. The role must have required permission to access the Amazon S3 bucket folder.

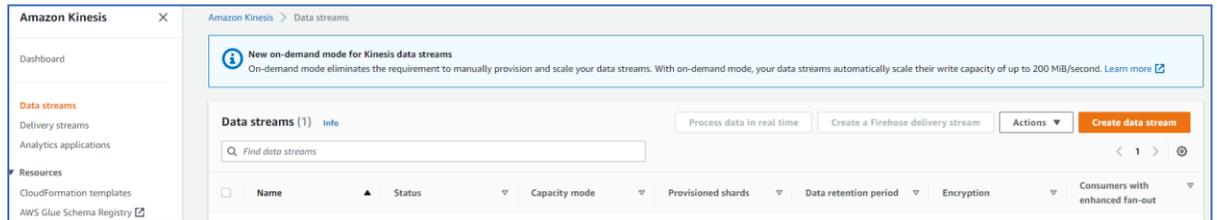
Segment role ARN:	<input type="text"/>	Amazon Resource Name (ARN) used to authorize Pinpoint to access Amazon S3 bucket folder
-------------------	----------------------	---

5.2.4 Configure Amazon Kinesis for Event Data Processing

This section describes how to create and configure Amazon Kinesis in Amazon Web Services (AWS). Kinesis will be used to capture an event data for Pinpoint Email (and Pinpoint SMS if applicable). Assuming you have already an Amazon Web Services account, please follow the steps below.

5.2.4.1 Provisioning a new Amazon Kinesis Data Streams

1. In Amazon Kinesis left pane menu, click **Data streams**.



2. Click Create data stream to create new data stream.
3. Enter the name of the data stream and select Provisioned option.

aws Services Search for services, features, blogs, docs, and more [Alt+S]

Amazon Kinesis > Data streams > Create data stream

Create data stream [Info](#)

Data stream configuration

Data stream name

Acceptable characters are uppercase and lowercase letters, numbers, underscores, hyphens and periods.

Data stream capacity [Info](#)

Capacity mode

On-demand
Use this mode when your data stream's throughput requirements are unpredictable and variable. With on-demand mode, your data stream's capacity scales automatically.

Provisioned
Use provisioned mode when you can reliably estimate throughput requirements of your data stream. With provisioned mode, your data stream's capacity is fixed.

Provisioned shards

The total capacity of a stream is the sum of the capacities of its shards. Enter number of provisioned shards to see total data stream capacity.

 [Shard estimator](#)

Minimum: 1, Maximum available: 199, Account quota limit: 200. [Request shard quota increase](#)

Total data stream capacity

Shard capacity is determined by the number of provisioned shards. Each shard ingests up to 1 MiB/second and 1,000 records/second and emits up to 2 MiB/second. If writes and reads exceed capacity, the application will receive throttles.

Write capacity	Read capacity
Maximum	Maximum
1 MiB/second and 1,000 records/second	2 MiB/second

4. Click **Create** data stream

The total capacity of a stream is the sum of the capacities of its shards. Enter number of provisioned shards to see total data stream capacity.

Shard estimator

Minimum: 1, Maximum available: 199, Account quota limit: 200. [Request shard quota increase](#)

Total data stream capacity
Shard capacity is determined by the number of provisioned shards. Each shard ingests up to 1 MiB/second and 1,000 records/second and emits up to 2 MiB/second. If writes and reads exceed capacity, the application will receive throttles.

Write capacity	Read capacity
Maximum 1 MiB/second and 1,000 records/second	Maximum 2 MiB/second

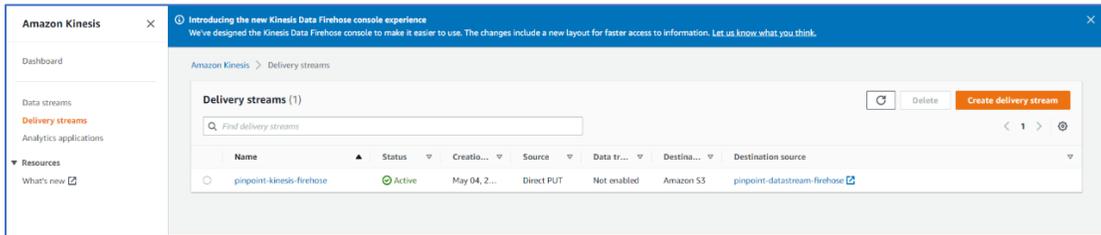
 Provisioned mode has a fixed-throughput pricing model. See [Kinesis pricing for Provisioned mode](#)

Data stream settings
You can edit the settings after the data stream has been created and is in the active status.

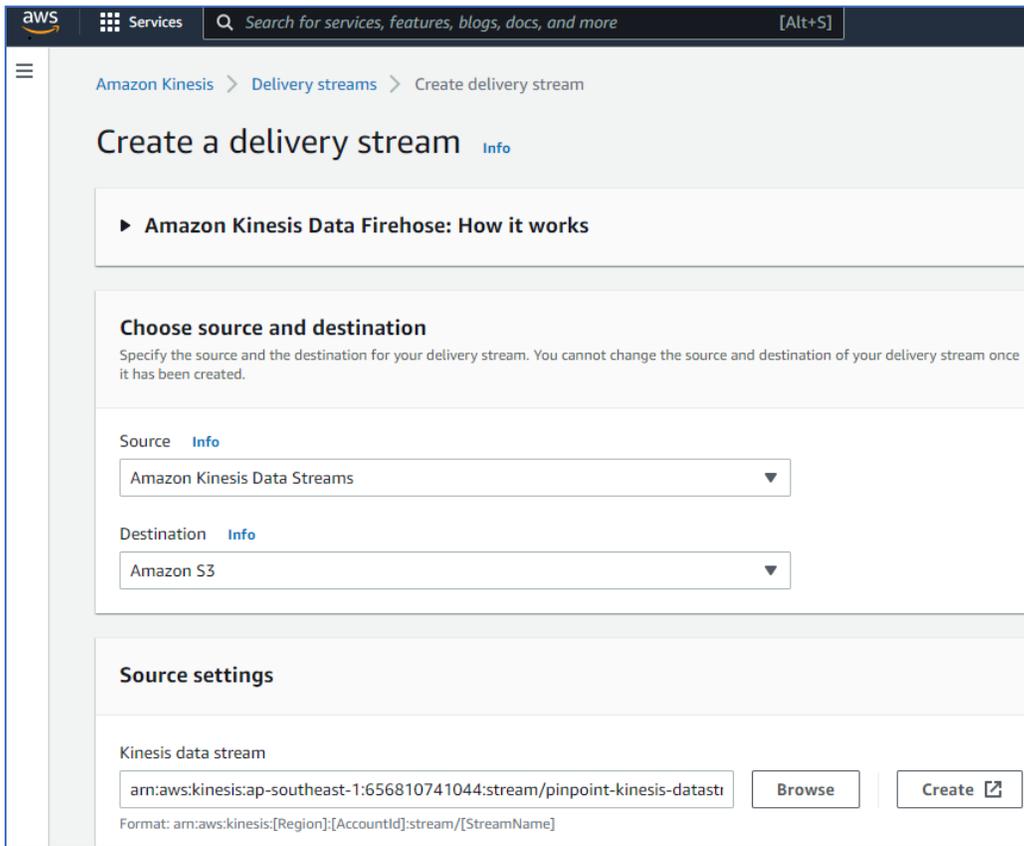
Setting	Value	Editable after creation
Capacity mode	Provisioned	 Yes
Provisioned shards	1	 Yes
Data retention period	1 day	 Yes
Server-side encryption	Disabled	 Yes
Monitoring enhanced metrics	Disabled	 Yes
Tags	-	 Yes

[Cancel](#) [Create data stream](#)

5. In Amazon Kinesis left pane menu, click Delivery streams.

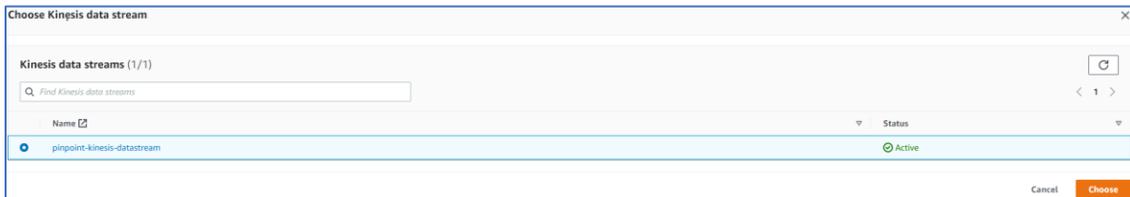


6. Click Create delivery stream to create new delivery stream.

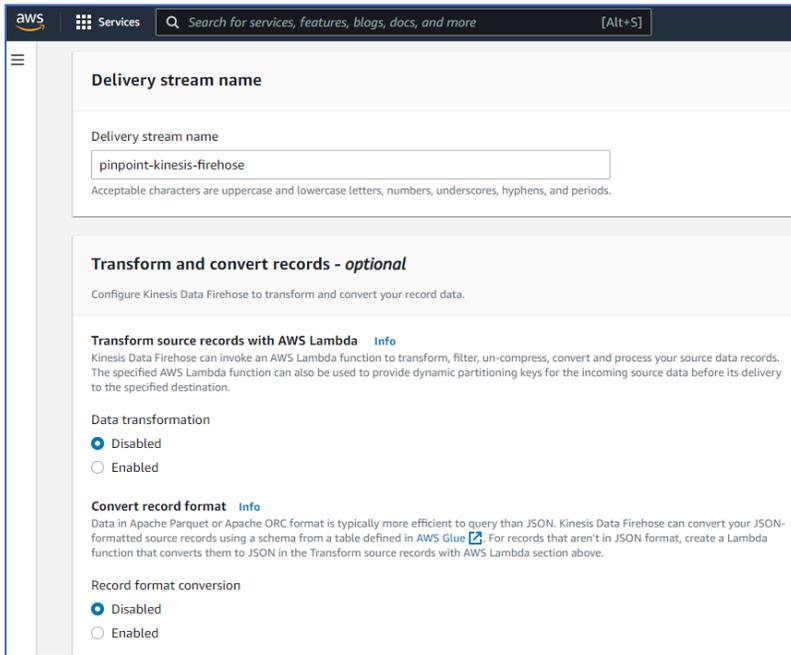


7. Choose Amazon kinesis Data Streams as your source and choose Amazon S3 as your destination.

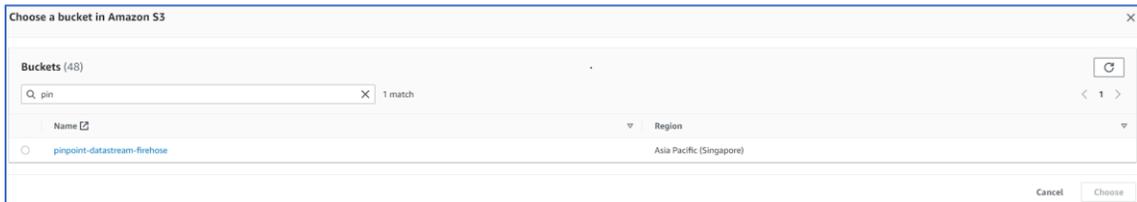
8. In the Source settings, browse and choose the data stream you have previously created.



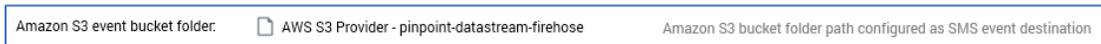
9. Enter the name of the delivery stream and leave other default options.



10. In the destination settings, choose an Amazon S3 bucket folder. You will need to create an S3 bucket if it does not exist. The event data will be written to the chosen bucket folder.



The bucket folder configured here will be used as Amazon S3 event bucket folder in Amazon Pinpoint Email channel plugin configured in Redpoint Interaction.



11. You may leave other default options. Click **Create** delivery stream.

The screenshot shows the 'Destination settings' configuration page in the AWS console. At the top, there is a search bar and a navigation menu. The main heading is 'Destination settings' with an 'Info' link. Below the heading, a sub-heading reads 'Specify the destination settings for your delivery stream.'

The 'S3 bucket' section contains a text input field with the value 's3://pinpoint-datastream-firehose', a 'Browse' button, and a 'Create' button with an external link icon. Below the input field, the format 'Format: s3://bucket' is displayed.

The 'Dynamic partitioning' section has an 'Info' link and a descriptive paragraph. It features two radio buttons: 'Disabled' (which is selected) and 'Enabled'.

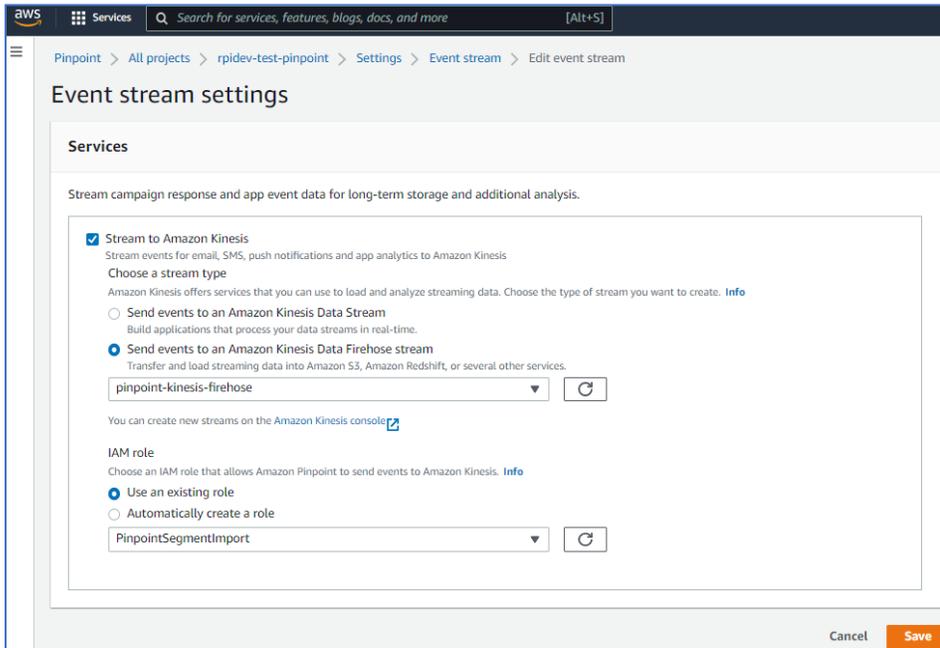
The 'S3 bucket prefix - optional' section includes a paragraph explaining the default prefix and a text input field with the placeholder 'Enter a prefix' and a green circular refresh icon.

The 'S3 bucket error output prefix - optional' section includes a paragraph and a text input field with the placeholder 'Enter a prefix'.

At the bottom of the configuration area, there are two expandable sections: 'Buffer hints, compression and encryption' and 'Advanced settings'. The 'Advanced settings' section is currently expanded, showing the text: 'Server-side encryption disabled; error logging enabled; IAM role KinesisFirehoseServiceRole-pinpoint-ap-southeast-1-1658400414244; no tags.'

At the very bottom of the page, there are two buttons: 'Cancel' and 'Create delivery stream'.

12. In the Settings menu of your Pinpoint Email project, click **Event stream**.



13. In the Event stream settings, select Stream to Amazon Kinesis option.

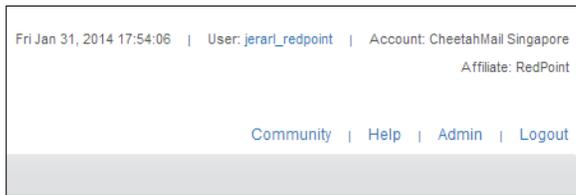
14. Choose *Send events to an Amazon Kinesis Data Firehose stream* option and select your previously created data stream

15. Finally, you can use existing or create new IAM role for the event stream.

5.3 CheetahMail Account Configuration

This section shows how to setup your CheetahMail account to configure an RPI CheetahMail email channel.

1. To acquire a CheetahMail account you will need to contact CheetahMail support directly to obtain the necessary credentials to setup an RPI CheetahMail email channel.
2. You will also need to request whitelisting of your IP address (i.e., the server where RPI is located). This is needed for SFTP access, which will facilitate downloads of email delivery results.
3. If your account allows you to add custom fields, log into <https://app.cheetahmail.com/cm/login>.
4. Click the Admin button in the upper navigation bar of the CheetahMail application.



5. In the Admin screen, click Account Admin.



6. In the Account Admin page, select Manage Fields. Add fields as stated in step 7.
7. If you cannot see Manage Fields on the Account Admin page, request CheetahMail support to add these fields for you. CheetahMail only supports STRING, NUMBER, DECIMAL and DATE data types for custom fields.

To create a generic custom field, you need to suffix the name of the data type to a series of numbers starting from 1.
 e.g., 'STRING1', 'STRING2', 'STRING3' and so on, or 'NUMBER1', 'NUMBER2', 'NUMBER3' up to 'NUMBER-N'.

Note: you can only request up to a total of 500 fields.

8. When results are read back from CheetahMail they are read via SFTP as part of the channel synchronization task that runs periodically. Daily exports need to be configured in CheetahMail as below to make sure the expected file is available:

Email Events Reported:	Bounces, Bulk Mail Sends, Bulk Mail Unsubscriptions, Clicks and Opens, Event Based Mail Sends, Issue ID File, Transactions
Loader Events Reported:	Loader Events
Subscription Events Reported:	Change of Address, Demographic Changes, Subscriptions, Unsubscriptions
Delimiter:	Comma Delimited
Compression:	zip
Output Directories:	/cmsg/fromcheetah/

The table below describes the CheetahMail RESTful service-based API calls that are utilized by the RPI CheetahMail channel plugin.

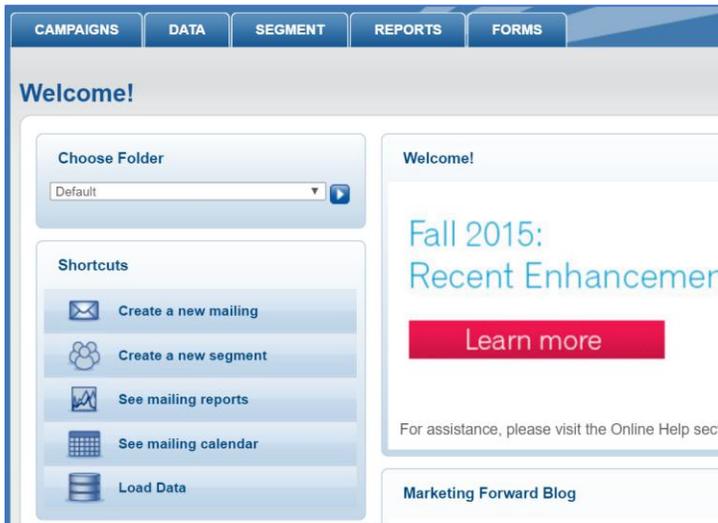
API	Service name	Usage	Call order	Data sent	Expected data
https://ebm.cheetahmail.com/api/login1	login1	Get a login cookie; this is used to authenticate other API calls.	1	API username and API password	Login cookie
https://ebm.cheetahmail.com/api/ok1	ok1	This is to ensure that we are properly passing the authentication cookie obtained from login1 service, and to check if the cookie does not expire yet.	2	Cookie	"OK"
https://ebm.cheetahmail.com/cgi-bin/api/setlist1	setlist1	Creates new subscriber list.	3	Subscriber list name	Subscriber list ID
https://ebm.cheetahmail.com/cgi-bin/api/getlist1	getlist1	Check if the newly created subscribers list is now available for use. This is important for the whole email sending process because creating the subscribers list from API takes 10 to 15 minutes before it will become available. Without this service to check subscriber list availability, the sending process will fail.	5	Subscriber list ID	"OK"
https://app.cheetahmail.com/api/bulkmail1	bulkmail1	Creates new mailing and execute mailing for send.	5/8	Email content	Mailing id

https://app.cheetahmail.com/cgi-bin/api/load1	load1	Upload subscriber's data.	6	Customer data	"OK"
https://app.cheetahmail.com/cgi-bin/api/mailgo1	mailgo1	Set mailing subscribers list and approve mailing for sent.	7	Mailing id, subscribers list id	"OK"
https://ebm.cheetahmail.com/api/setuser1	setuser1	Re-subscribe contact.	By request	Email address	"OK"
https://ebm.cheetahmail.com/api/getuser1	getuser1	Check if contact exists in CheetahMail.	By request	Email address	Contact demographics

5.3.1 Creating a Subscriber List

1. In a web browser, log into <https://app.cheetahmail.com/cm/login>.

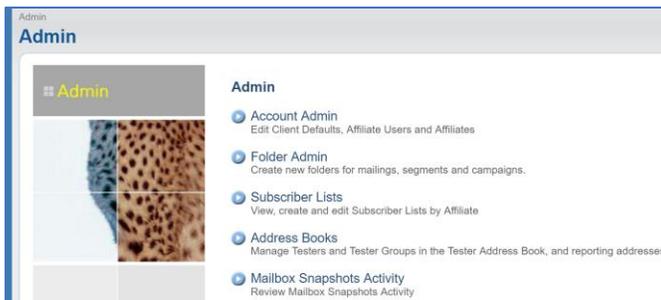
- Once you have successfully logged into the portal, you will be redirected to its main page.



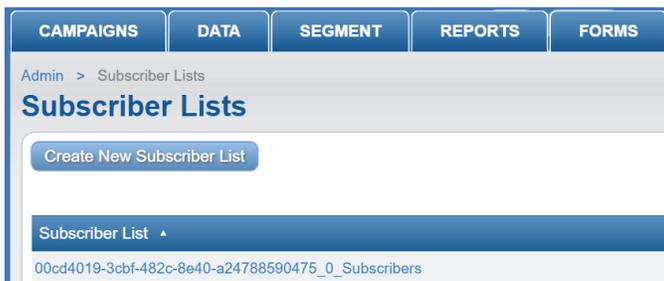
- Click the **Admin** tab.



- Click **Subscriber List**.



- To create a Subscriber List, click **Create New Subscriber List**.



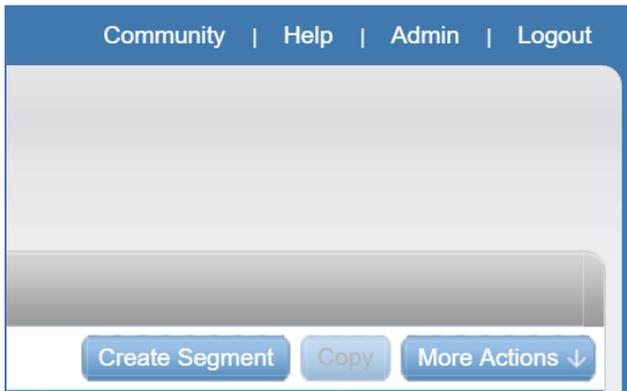
- You will now be redirected to the Create New Subscriber List page. Enter a List Name (the only required field).

- Click **Save** to commit your changes.
- Select the newly created Subscriber List. In the browser's address bar, look for the 'pid' parameter. Take note of its value, as you will use this to configure the channel's Subscriber list ID.

5.3.2 Creating a Segment

- Log in to the CheetahMail portal.
- Click **Segment > Segments**.

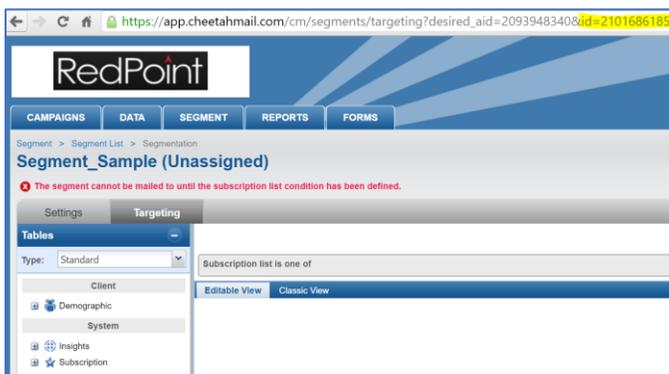
3. Click **Create Segment**.



4. Enter a unique segment name then click Create.

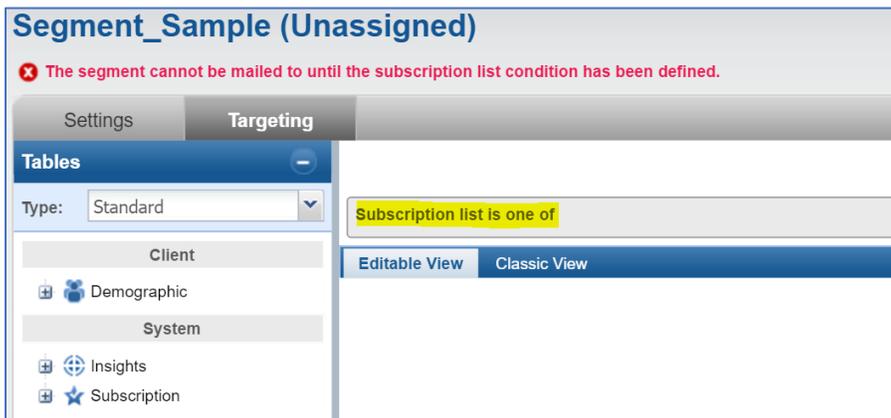


5. The newly created segment should be displayed; otherwise select it from the list of segments.

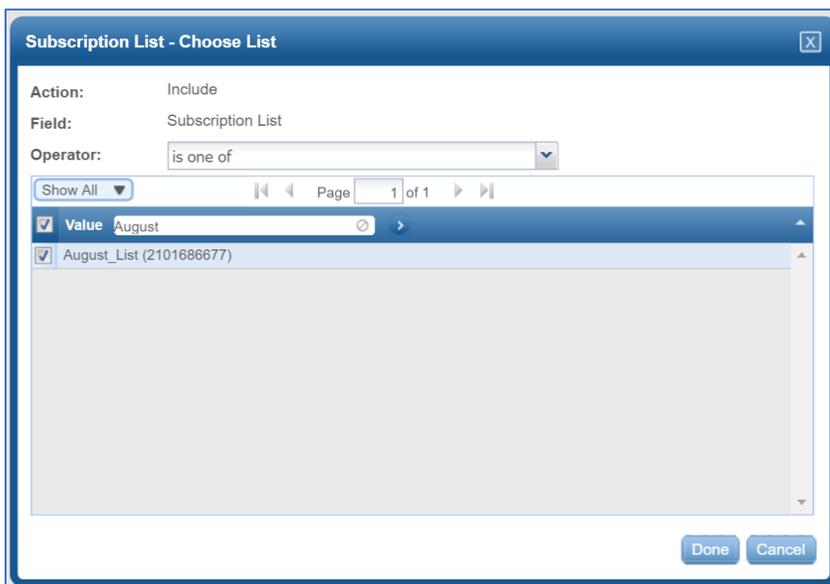


6. In the browser's address bar, look for URL parameter 'id'. Take note of its value, as you will use this to configure the channel's Segment ID.

7. Click **Subscription list is one of**.



8. Select the Subscriber List you want to associate with the segment, then click **Done** to commit your changes.

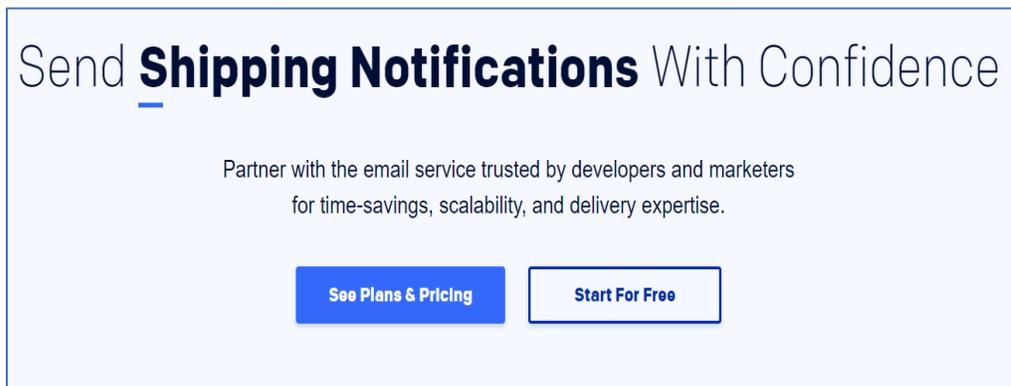


5.4 SendGrid Account Configuration

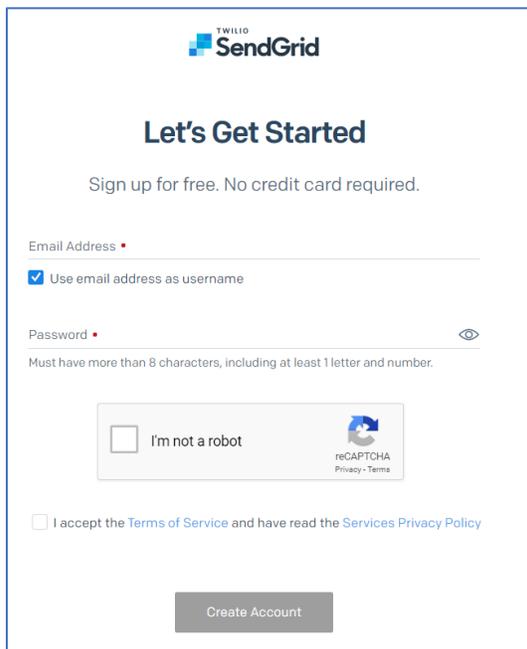
This section describes how to set up a SendGrid account to configure an RPI SendGrid email channel.

5.4.1 Setting up an Account

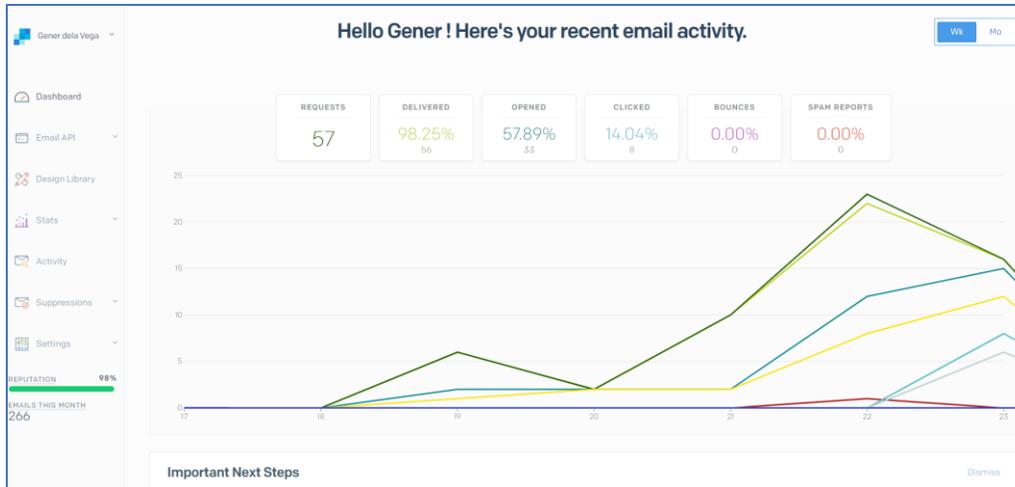
1. To acquire a SendGrid account, you will need to sign up for either a free or a paid account. If you wish to sign up for a paid account, navigate to <http://sendgrid.com/transactional-email/pricing>. To sign up for a free SendGrid account, navigate to <http://sendgrid.com>.
2. At the SendGrid home page, hover over the Pricing tab and click Get Started for Free.



3. A SendGrid sign up form will be displayed. Fill in the required details and click Create Account.

A screenshot of the SendGrid sign-up form. The form is titled "Let's Get Started" and includes the text "Sign up for free. No credit card required." The form fields include: "Email Address" with a checkbox for "Use email address as username" (checked), "Password" with a strength indicator and a note "Must have more than 8 characters, including at least 1 letter and number.", a reCAPTCHA "I'm not a robot" widget, and a checkbox for "I accept the Terms of Service and have read the Services Privacy Policy". A "Create Account" button is at the bottom.

4. Once you have created your account successfully, you will be emailed by SendGrid support to activate your account.
5. Once you have activated your account successfully, you may log into the SendGrid portal.



The table below describes the SendGrid RESTful service-based API calls utilized by the RPI SendGrid channel plugin.

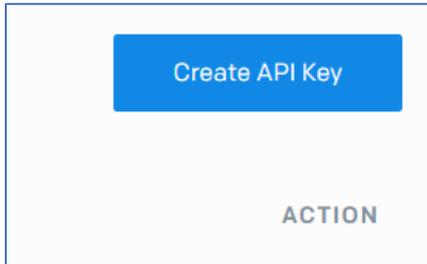
API	HTTP VERB	Data	Usage
https://sendgrid.com/api/mail.send.json	POST	api_user=your_sendgrid_username&api_key=your_sendgrid_password&to=destination@example.com&toname=Destination&subject=Example_Subject&text=testingtextbody&from=info@domain.com	This endpoint allows you to send email.
https://sendgrid.com/api/profile.get.json	POST	api_user=your_sendgrid_username&api_key=your_sendgrid_password	View your SendGrid Profile.
https://sendgrid.com/api/unsubscribes.delete.json	POST	api_user=your_sendgrid_username&api_key=your_sendgrid_password&email=emailToDelete@domain.com	Delete entries in the Unsubscribes list.
https://sendgrid.com/api/unsubscribes.get.json	POST	api_user=your_sendgrid_username&api_key=your_sendgrid_password&date=1	Retrieve entries in the Unsubscribes list.

For more details about SendGrid APIs, please see <https://sendgrid.com/docs/>

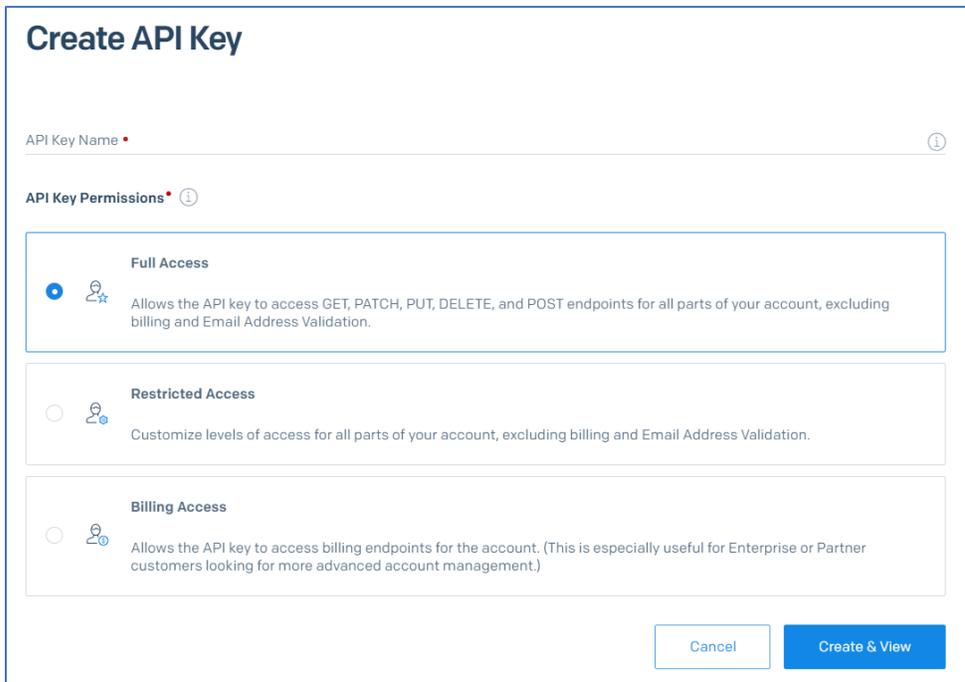
5.4.2 Setting up an API key for SendGrid Web API v3

An API key and API key ID are required to configure a SendGrid email channel to use the SendGrid Web API v3.

1. In a browser, navigate to <https://sendgrid.com/login> and sign in.
2. Click Settings > API Keys.
3. In the API Keys section, click Create API Key and select General API Key.



4. Enter the name of the API Key, select API Key Permission and click Save.

A screenshot of the "Create API Key" form. It features a title "Create API Key" at the top. Below the title is a text input field for "API Key Name" with a red asterisk and an information icon. Underneath is a section for "API Key Permissions" with an information icon. This section contains three radio button options: "Full Access" (selected), "Restricted Access", and "Billing Access". Each option includes a description of the permissions. At the bottom right of the form are two buttons: "Cancel" and "Create & View".

5. Copy the API Key and store it in a safe place to avoid your account being compromised.

Note that a SendGrid account must have the following minimum required permissions when used with RPI:

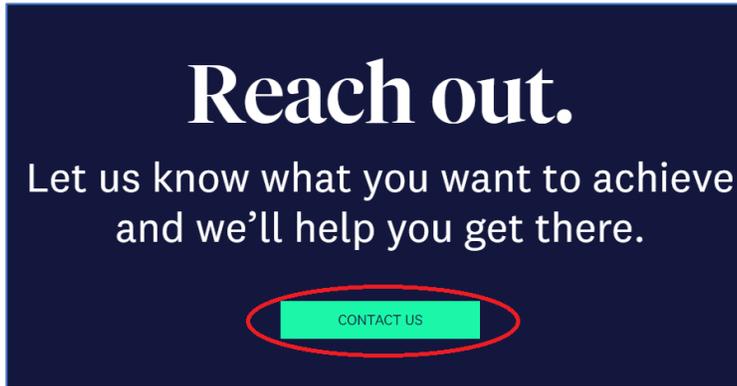
- API Keys - Read Access
- Mail Send - Full Access
- Category - Full Access

- Email Activity - Read Access
- Suppressions - Full Access
- Tracking - Full Access

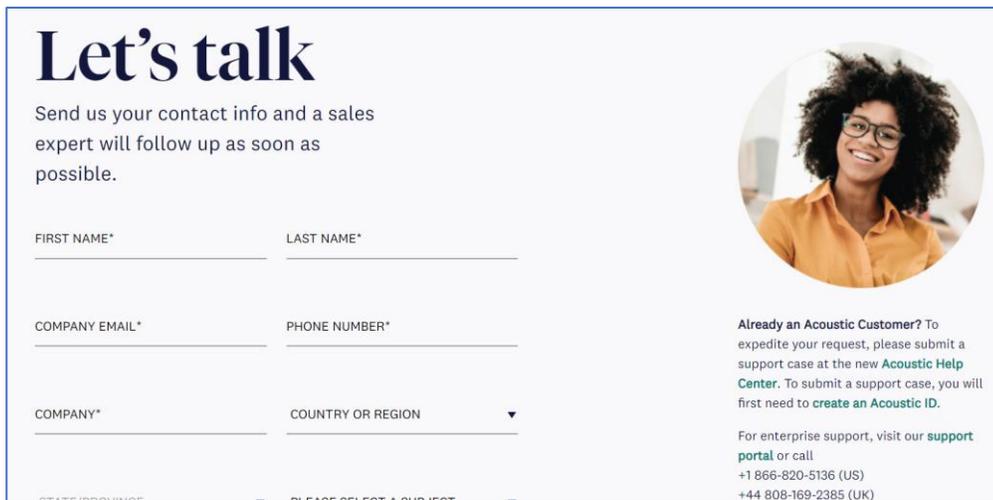
5.5 Acoustic Account Configuration

This section shows how to set up an Acoustic account for use with RPI.

1. To create an Acoustic account, please navigate to <http://www.acoustic.com/>.
2. Click Contact Us.



3. Call a sales representative or complete and submit the form.



Let's talk

Send us your contact info and a sales expert will follow up as soon as possible.

FIRST NAME* LAST NAME*

COMPANY EMAIL* PHONE NUMBER*

COMPANY* COUNTRY OR REGION ▼

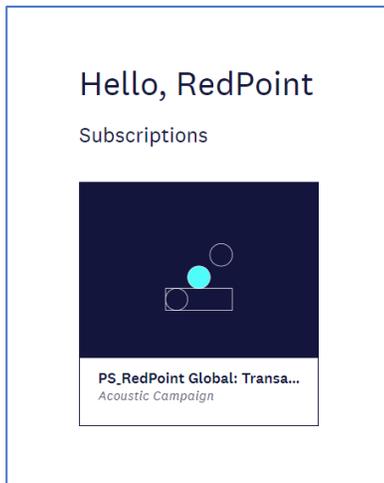
STATE/PROVINCE ▼ PLEASE SELECT A SUBJECT ▼

Already an Acoustic Customer? To expedite your request, please submit a support case at the new **Acoustic Help Center**. To submit a support case, you will first need to **create an Acoustic ID**.

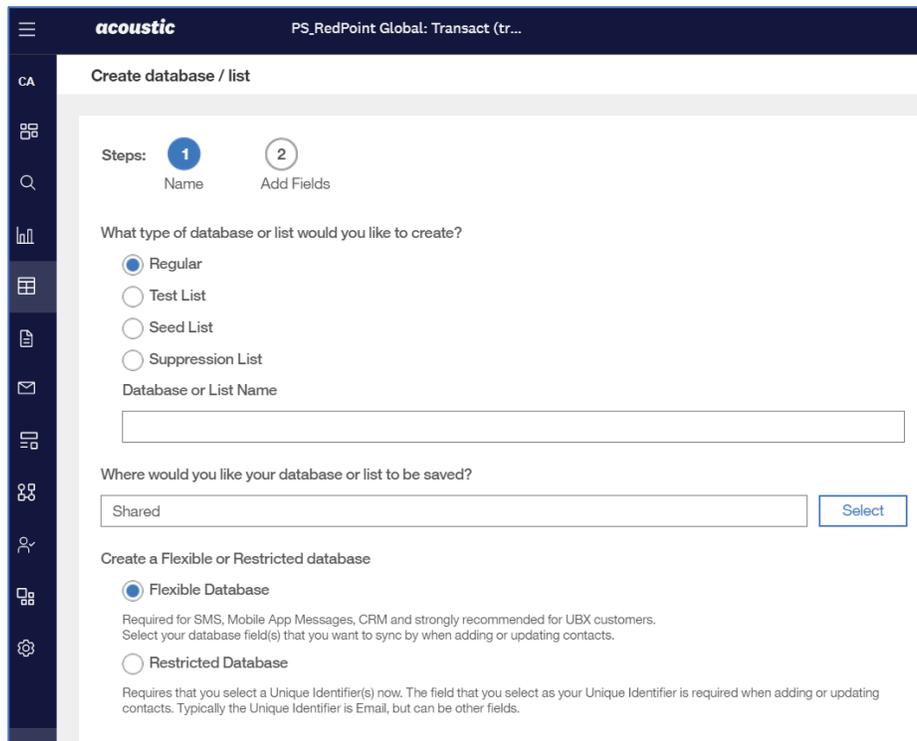
For enterprise support, visit our **support portal** or call
+1 866-820-5136 (US)
+44 808-169-2385 (UK)

4. Once you have credentials, navigate to <https://goacoustic.com>.

5. In your My Acoustic page, select your subscription.



6. Create a Regular Database and store it in a Shared folder. Click Next.



acoustic PS_RedPoint Global: Transact (tr...

CA Create database / list

Steps: 1 Name 2 Add Fields

What type of database or list would you like to create?

Regular

Test List

Seed List

Suppression List

Database or List Name

Where would you like your database or list to be saved?

Shared

Create a Flexible or Restricted database

Flexible Database

Required for SMS, Mobile App Messages, CRM and strongly recommended for UBX customers. Select your database field(s) that you want to sync by when adding or updating contacts.

Restricted Database

Requires that you select a Unique Identifier(s) now. The field that you select as your Unique Identifier is required when adding or updating contacts. Typically the Unique Identifier is Email, but can be other fields.

7. Add RPContactID and ChannelExecutionID fields and click the Create button.

Steps: **1** Name **2** Add Fields

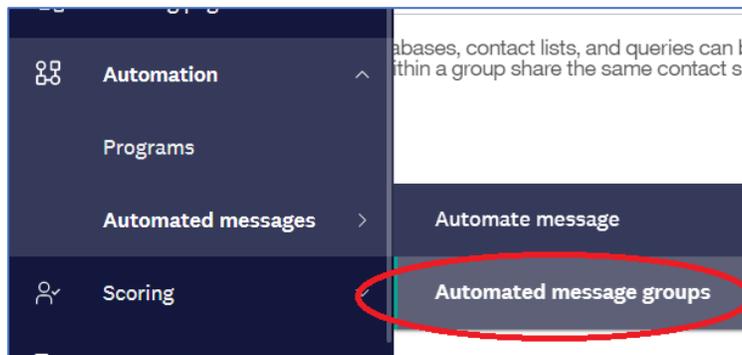
Field Name

Field Type
Text

Database / List Fields

	Email Type	System	No	
	Opted Out Date	System	No	
	CRM Lead Source	System	No	
	Last Modified Date	System	No	
	Opt Out Details	System	No	
	Opt In Date	System	No	
	CREATED_FROM	System	No	
Delete	Edit	ChannelExecutionID	Text	No
Delete	Edit	RPContactID	Text	No

8. Create an Automated Message Group.



9. Associate the Transact database as the group's Contact Source.

Create a Group of Automated Messages

Details

Name
RPI Doc

Notes

Contact Source
RPIDevDoc Select

***Note:** Only shared databases, contact lists, and queries can be assigned to a group of automated messages. All automated message within a group share the same contact source.

10. Set the Event Trigger to Transact XML.

Event Trigger

Opt In Date

Custom Event Date
[Dropdown]

Calendar Date
[Date Field] 
M/D/YY

Send new contacts all previously delivered mailings

Recurring Mailings

None
(Specific dates will be required for all scheduled mailings)

Transact (No dates will be required)
XML [Dropdown]

11. Set the Tracking Level to Unique.

Completion Date (Optional)



M/D/YY

Tracking Level
(Automated Messages)

Unique

Aggregate

Open Only

No Tracking

[Save & Activate](#) [Save Draft](#) [Cancel](#)

12. Click Save & Activate.

Group of Automated Messages Summary

<<Back to: [View All Groups](#)

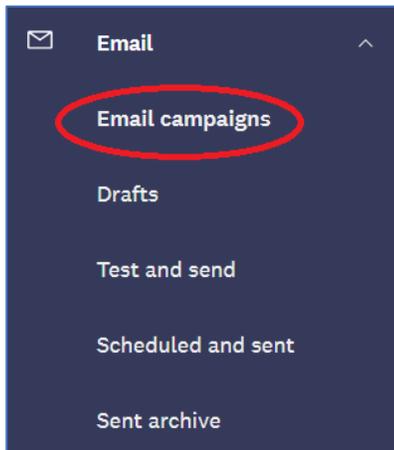
Group Name	RPI Doc
ID	33109381
Notes	none
Contact Source	RPIDevDoc
Status	Active
Event Trigger	Transact
Tracking Level	Unique
Completion Date	none

[Edit](#)

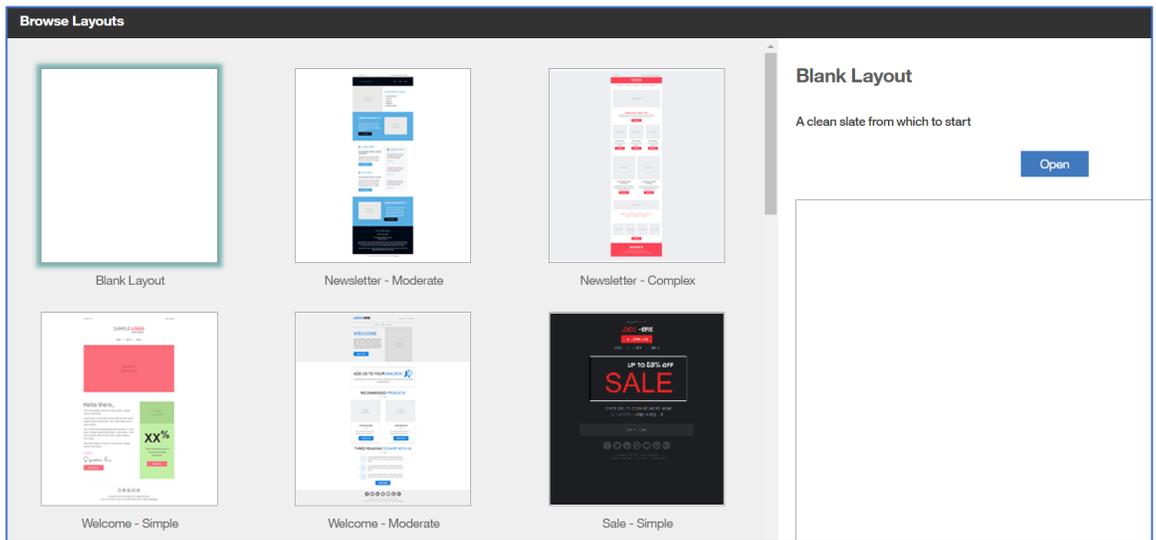
[Cancel](#)

Note that the Group ID is required when configuring the RPI Acoustic channel.

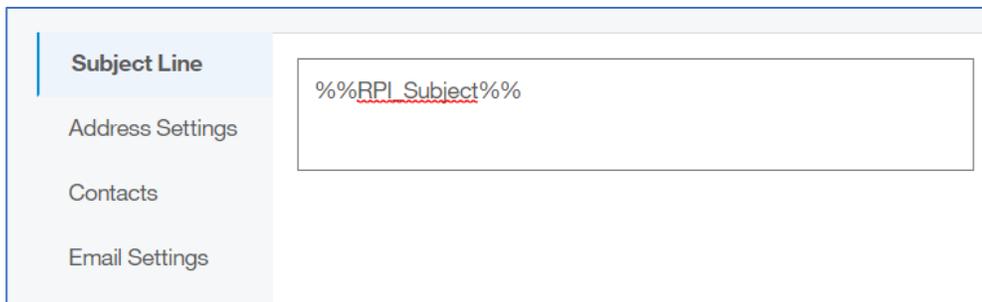
13. In the Email menu, create an Email Campaign.



14. Select the Blank layout.



15. Configure the email settings as described below:



Subject Line	Default Personalized
Address Settings	From Name <input type="text" value="%%RPI_FromName%%"/>
Contacts	From Address <input type="text" value="%%RPI_FromAddress%%"/>
Email Settings	Reply-to Address <input type="text" value="%%RPI_FromAddress%%"/>

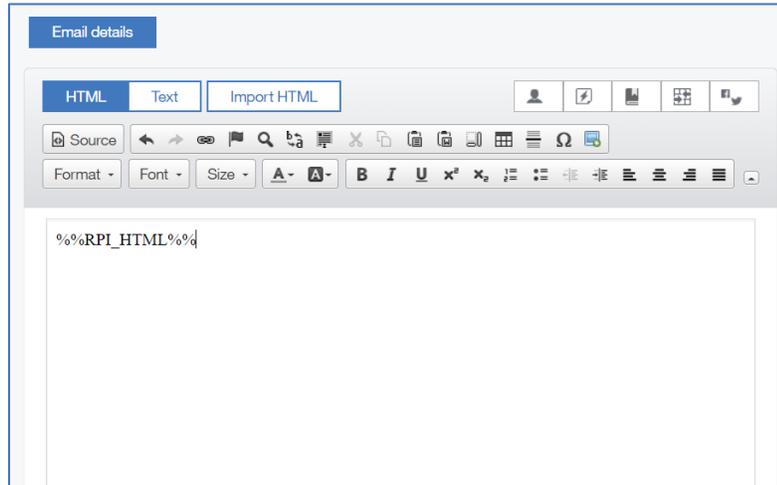
Subject Line	Select Contact Source	
Address Settings	Contact Source:	RPIDevDoc (Change)
Contacts	Owner:	transact@redpoint.net
Email Settings	Seed List(s):	
	Suppression List(s):	
	Send Time Optimization:	Disabled

- Set the Contact Source property to the Transact database.
- Set Subject Line to '%%RPI_Subject%%'.
- Set the personalized From Name to %%RPI_FromName%%
- Set the personalized From Address to %%RPI_FromAddress%%.
- Set "Click to view in Browser" to off

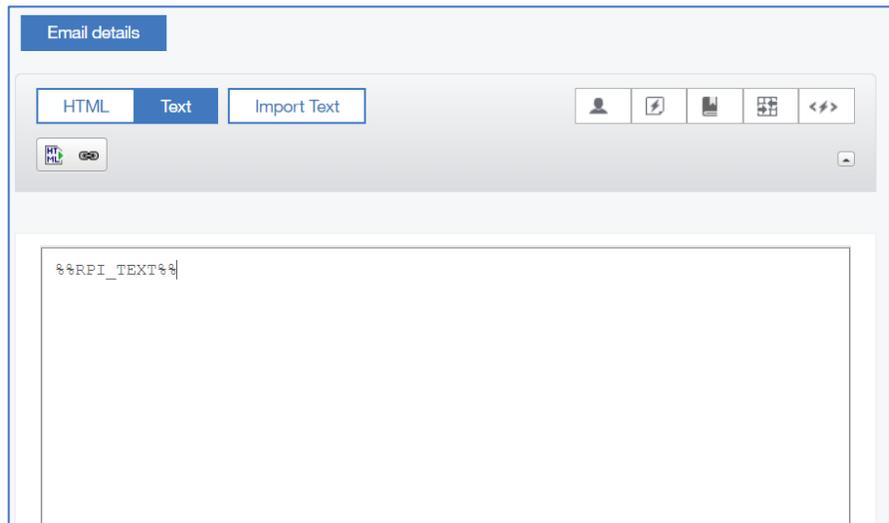
Subject Line	Template Location <input type="text" value="Private"/> <input type="button" value="Browse"/>
Address Settings	Message Encoding <input type="text" value="Unicode: utf-8"/>
Contacts	Tracking Level <input checked="" type="radio"/> Unique <input type="radio"/> Aggregate <input type="radio"/> Opens Only <input type="radio"/> No tracking
Email Settings	Insert 'Click to View in Browser' link at top of this email <input type="button" value="On"/> <input checked="" type="button" value="Off"/>

16. Set the email body as follows:

- In the HTML tab, set the body text to %%RPI_HTML%%.



- In the Text Only tab, set the body text to %%RPI_TEXT%%



- Save the email to persist the settings. Then configure the mailing body to automate send mailing by clicking the Automate button.



- Select the Assign Mailing to Existing Group... radio button. Save the mailing as Active.

Setup as Autoresponder Based on Trigger Event: If user or contact performs trigger event, THEN send this email.

- Opt In
- Edit Profile
- Custom

Assign Email to Existing Group of Automated Messages: Only groups that share the same contact source will appear in the dropdown.

RPI Doc

Group Event Trigger
Transact

Start sending to all contacts at scheduled start

Use Send Time Optimization (STO) to send at contact's preferred send time over a period of

24 HOURS from start date/time

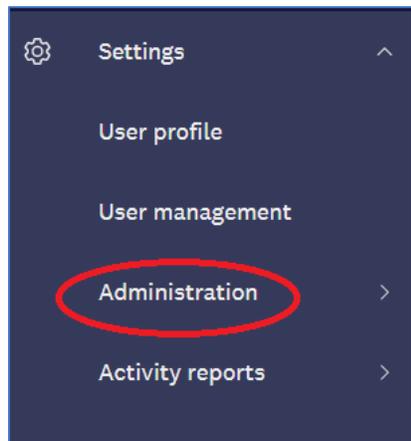
Note:STO will override throttling.

Upon assignment, save email as

Active

17. Configure the sending IP address in the Org Admin section

- Click on Settings > Administration > Security Settings > Access Restrictions.



Access Restrictions

Note: All changes you make in the Access Restrictions take effect immediately (no save required).

General Restrictions

Requires HTTPS: Requires all users to access Campaign through an HTTPS connection. This option is more secure but can slow down access.

Allow Multi-account Sign-on: Allows an Org Admin to configure an account so another user can link into it.

IP Access Restrictions

Users: You can limit the access of users in this organization to the IP addresses you specify below. Restrictions added here for UI and API access can be overridden by user IP restrictions on a per user basis. To enable IP restrictions, add one or more IPs below and set the allowed access.

Applications: IP access restrictions only apply to API requests that use sessionid authentication. If you are using OAuth authentication to call our APIs, OAuth credentials are used to restrict access instead of IP addresses.

Your current IP address: [REDACTED]

If you activate IP restrictions by checking any IP address in the Allow UI Access column and you don't also check this IP address, you may lock yourself out of the organization.

Type	IP Address	Restricted			Unrestricted	Actions
		Allow UI Access	Allow API Access	Allow FTP Access		
[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Delete	
[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Delete	
[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Delete	

- Add new IP Address
- Check Allow UI Access
- Check Allow API Access

18. Optionally configure an unsubscribe landing page:

- Click on Settings > Organization Settings > Opt Out/Suppression Settings.

Opt Out/Suppression Settings

Enable Organization Suppression List: Yes

Organization Suppression List: MASTER SUPPRESSION LIST

Organization Suppression Opt Out Handling: Add Opt Outs

Allow forwards to be sent to suppressed contacts: No

Opt Out Link Required to Send: Yes

Custom Opt Out URLs: http://www.pages01.net/ps_redpointglobaltransact/RPI_Unsubscribe/

5.6 Instiller Account Configuration

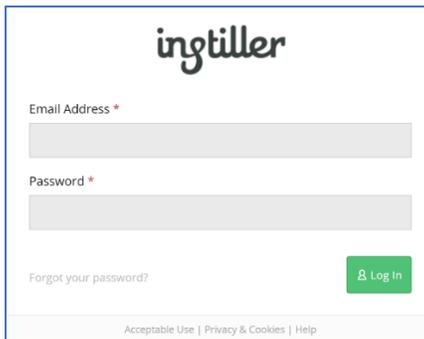
This section shows how to setup your Instiller account to configure the RPI Instiller email channel plugin. Please follow the steps below:

5.6.1 Account Provisioning and Signing In

Note: Provisioning an Instiller account requires liaison with an Instiller representative.

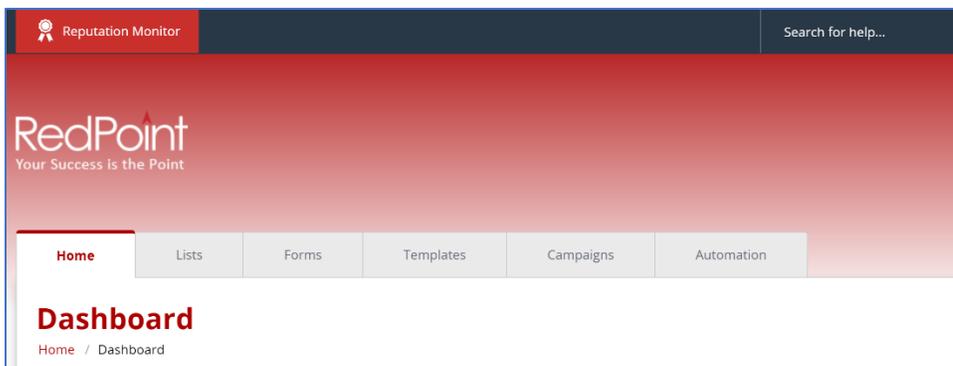
This section describes how to login to the Instiller portal. Please follow the steps below:

1. In a web browser, log onto the provisioned Instiller portal using the URL provided by your Instiller representative. At the login page, enter your username and password.



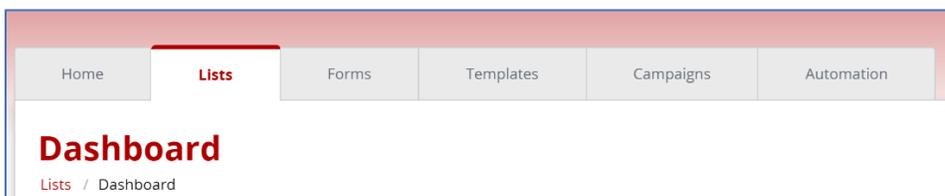
The image shows the Instiller login page. At the top center is the 'ingtiller' logo. Below it are two input fields: 'Email Address *' and 'Password *'. To the right of the password field is a green 'Log In' button with a user icon. Below the password field is a link that says 'Forgot your password?'. At the bottom of the page, there are links for 'Acceptable Use | Privacy & Cookies | Help'.

2. Having successfully logged into the portal, you will be redirected to the main page of the portal as shown below.

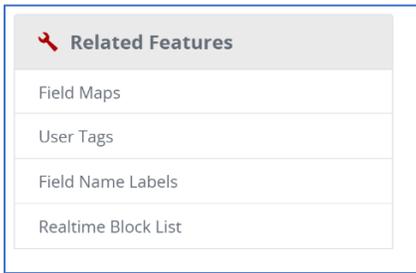


5.6.2 Field Maps Configuration

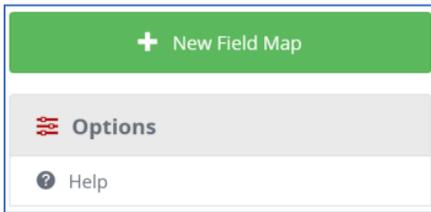
1. In the main portal page, show the Lists tab.



2. Click Field Maps in the Related Features section.



3. In the Field Maps section, click New Field Map.



- In the New Field Map section, supply the required fields. In this case, you must supply values for Name and API Identifier. Do not change the default value of First Row Headings and Field Delimiter.

New Field Map

Lists / Field Maps / New Field Map

Details

After saving the basic details of your Field Map you will then be able to select the required columns.

Name *

API Identifier

First Row Headings No - Process first row of file

Field Delimiter Comma separated

CSV Columns

Add columns into the Field Map and set the correct order using the arrows at the end of each row.

User Profile
Custom Fields
Tags
Placeholder

Type	Column	Length	Notes
1 PROFILE	Email Address	75 Chars	Valid email address format required

Save Changes
Cancel

In the CSV Columns section, you must create custom fields with the following names:

rpi_extendeddata
rpi_dynamicassets

CSV Columns

Add columns into the Field Map and set the correct order using the arrows at the end of each row.

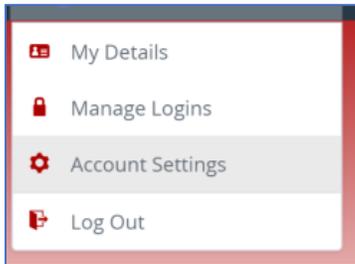
User Profile
Custom Fields
Tags
Placeholder

Type	Column	Length	Notes
1 PROFILE	Email Address	75 Chars	Valid email address format required
2 CUSTOM	rpi_extendeddata	-	
3 CUSTOM	rpi_dynamicassets	-	

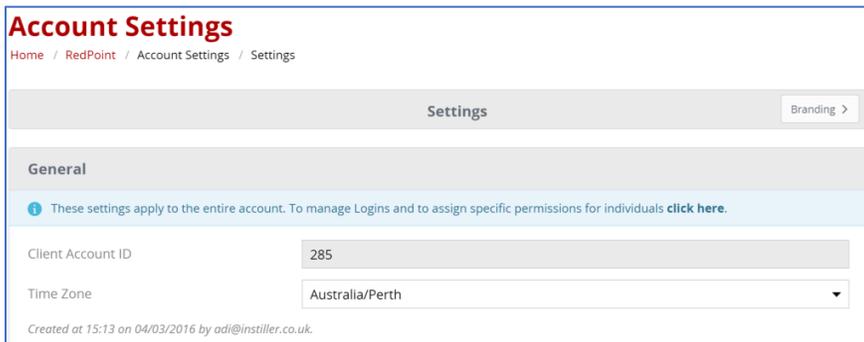
Click Save Changes to create the new Field Mapping. Take note of the API Identifier, as you will use its value as the Field mappings identifier when configuring the RPI Instiller channel plugin.

5.6.3 Setting Up the Time Zone

1. In the main portal page, click Account Settings.



2. In the Account Settings section, set the appropriate time zone.



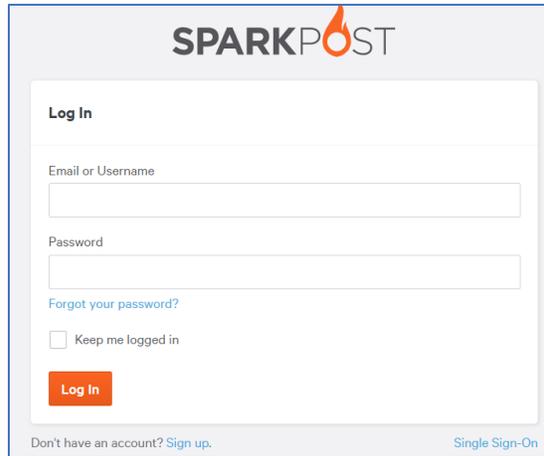
5.7 SparkPost Account Configuration

5.7.1 Account Provisioning and Signing In

Note: Provisioning an Elite SparkPost account requires liaison with a SparkPost representative.

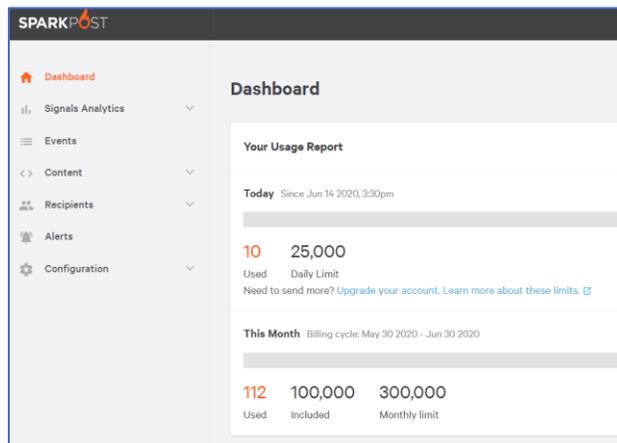
This section describes how to login to the SparkPost portal. Please follow the steps below:

1. In a web browser, log into your provisioned SparkPost portal using the URL provided by your SparkPost representative. At the login page, enter your username and password.



The screenshot shows the SparkPost login page. At the top is the SparkPost logo. Below it is a 'Log In' section with a white background. It contains two input fields: 'Email or Username' and 'Password'. Below the password field is a link for 'Forgot your password?' and a checkbox for 'Keep me logged in'. An orange 'Log In' button is at the bottom of the form. At the very bottom of the page, there are two links: 'Don't have an account? Sign up.' and 'Single Sign-On'.

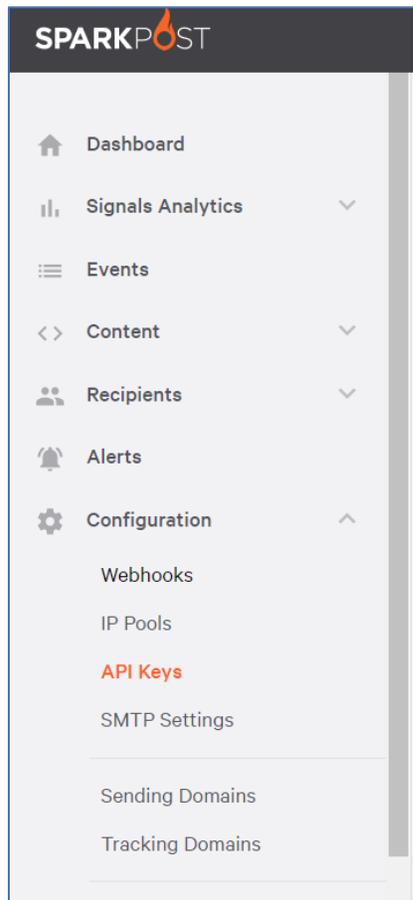
2. Once you have successfully logged in, you will be redirected to the main portal page.



The screenshot shows the SparkPost dashboard. On the left is a navigation sidebar with icons and labels for 'Dashboard', 'Signals Analytics', 'Events', 'Content', 'Recipients', 'Alerts', and 'Configuration'. The main content area is titled 'Dashboard' and features a 'Your Usage Report' section. This section shows usage for 'Today' (Since Jun 14 2020, 3:30pm) with a bar chart and the number '10' next to '25,000'. Below this, it shows usage for 'This Month' (Billing cycle: May 30 2020 - Jun 30 2020) with a bar chart and the number '112' next to '100,000' and '300,000'.

5.7.2 API Key Provisioning

1. In the main portal page, click Configuration and then API Keys.



2. Click Create API Key.



3. Supply an API Key Name and the appropriate API permissions. Click Create API Key to create a new API key.

← API Keys

Create API Key

API Key Name

Subaccount
None

This assignment is permanent. Leave blank to assign to master account.

API Permissions

All
 Select

<input type="checkbox"/> Metrics: Read-only	<input type="checkbox"/> Send Via SMTP	<input type="checkbox"/> Account: Read
<input type="checkbox"/> Events Search: Read-only	<input type="checkbox"/> Recipient Lists: Read/Write	<input type="checkbox"/> Account: Read/Write
<input type="checkbox"/> Event Webhooks: Read/Write	<input type="checkbox"/> Tracking Domains: Read-only	<input type="checkbox"/> Subaccounts: Read/Write
<input type="checkbox"/> Event Webhooks: Read/Write	<input type="checkbox"/> Tracking Domains: Read/Write	<input type="checkbox"/> Subaccounts: Read
<input type="checkbox"/> Templates: Read-only	<input type="checkbox"/> Sending Domains: Read/Write	<input type="checkbox"/> IP Pools: Read/Write
<input type="checkbox"/> Templates: Read/Write	<input type="checkbox"/> Inbound Domains: Read/Write	<input type="checkbox"/> IP Pools: Read
<input type="checkbox"/> Templates: Preview	<input type="checkbox"/> Suppression Lists: Read/Write	<input type="checkbox"/> A/B Testing: Read/Write
<input type="checkbox"/> Transmissions: Read-only	<input type="checkbox"/> Relay Webhooks: Read-only	<input type="checkbox"/> Engagement Recency: Read/Write
<input type="checkbox"/> Transmissions: Read/Write	<input type="checkbox"/> Relay Webhooks: Read/Write	<input type="checkbox"/> Data Privacy: Read/Write

Allowed IPs

Leaving the field blank will allow access by valid API keys from any IP address.

Create API Key

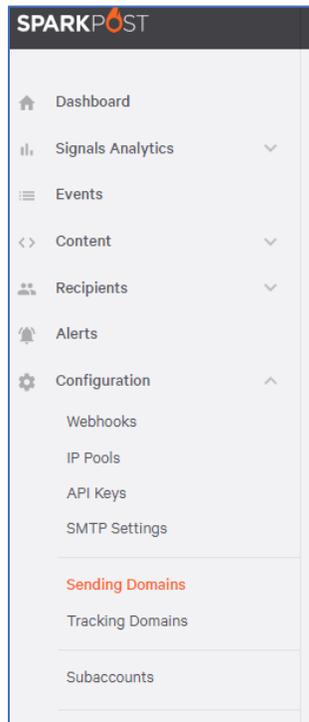
4. Copy the API Key value and store it safely.

 **New API Key**
Make sure to copy your API key now. You won't be able to see it again!

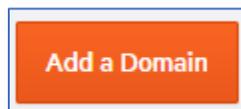
37e52b0!

5.7.3 Sending and Tracking Domain Configuration

1. To configure a Sending Domain, in the main portal page, click Configuration and then Sending Domains.



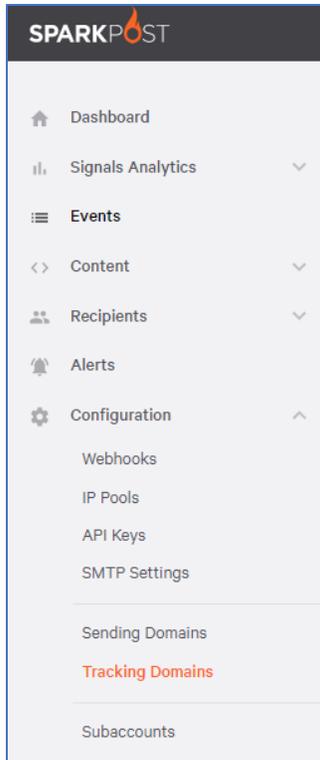
2. Click New Domain and supply a valid sending domain.



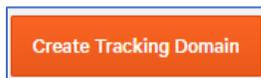
3. Test the sending domain and make sure that validation is successful.



4. To configure a Tracking Domain, in the main portal page, click Configuration and then Tracking Domains.



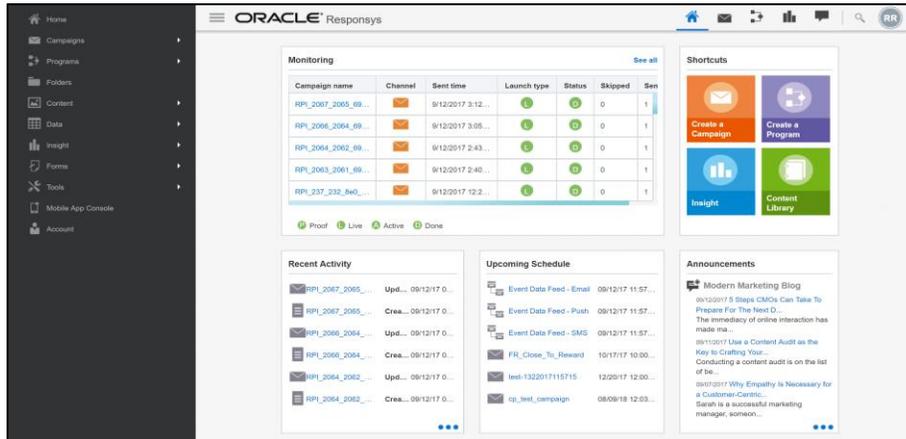
5. Click New Domain and supply a valid tracking domain.



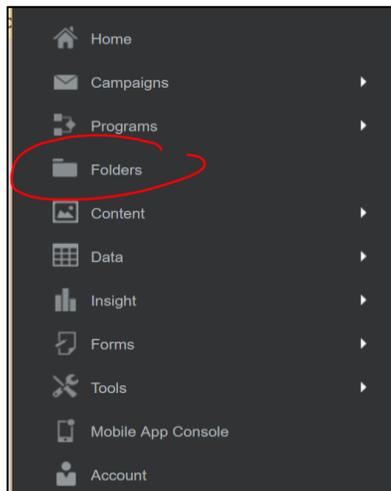
5.8 Responsys Account Configuration

5.8.1 Creating the Folder

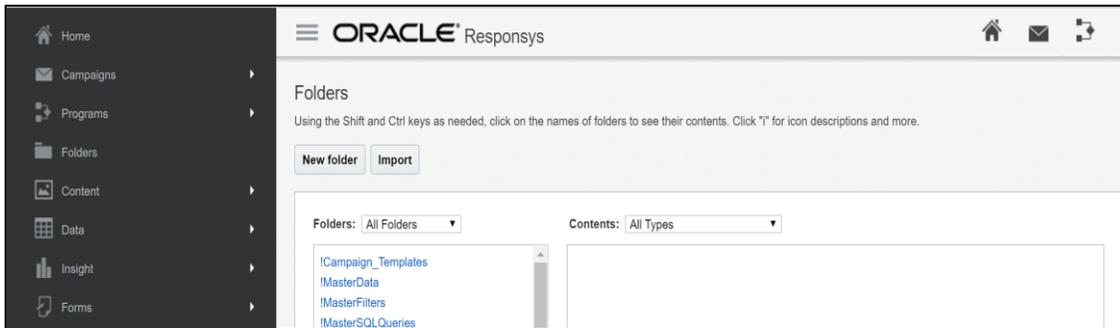
1. In a web browser, log into the Responsys portal at <https://interact2.responsys.net/suite/c>.
2. Once you have successfully logged in, you will be redirected to the main page of the portal, as shown below.



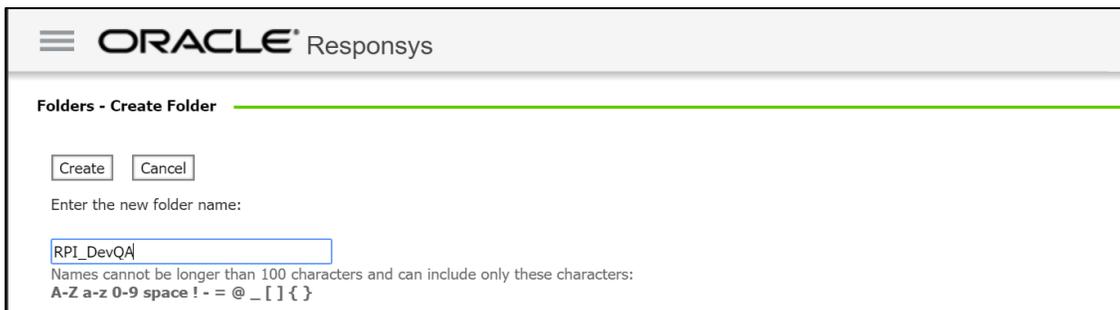
3. At the portal navigation menu, click Folders.



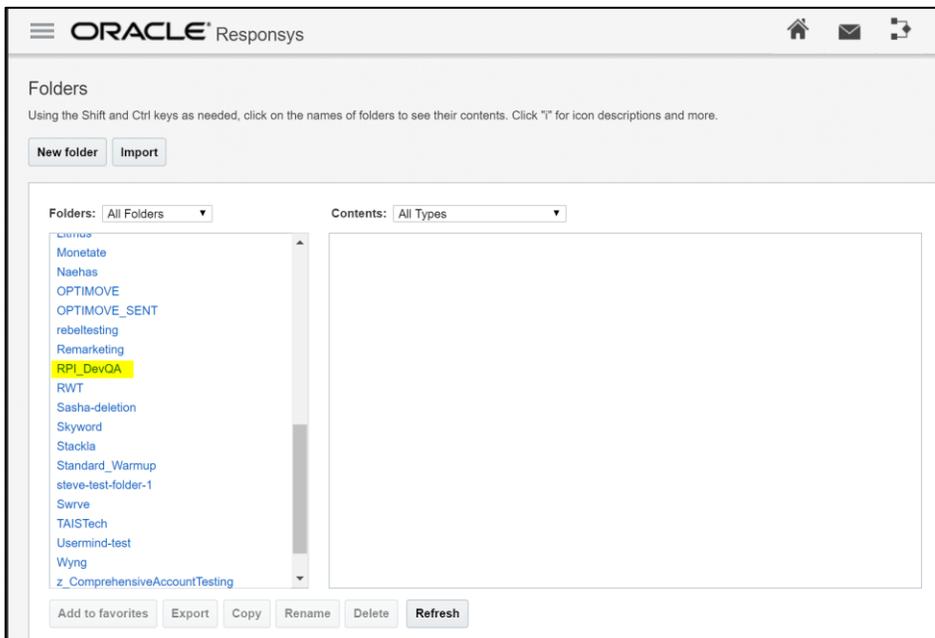
- Once the Folder page is displayed, click New folder.



- Enter the desired folder name, then click Create. You will be redirected to the list of Folders.



- Check the list to verify if the folder was successfully created.



- Take note of the folder name as you will use it when creating the profile list.

5.8.2 Creating the Profile List

1. On the left side of the portal, click Data > Manage List.

View:	Deliverable	Undeliverable	Total
Opt-In	23 (92%)	0 (0%)	23 (92%)
Opt-Out	2 (8%)	0 (0%)	2 (8%)
Total	25 (100%)	0 (0%)	25

2. Click Create New List.

3. Enter the desired profile list name and select the folder as created previously. Click Save.

Create list

Define the name and location of the List.

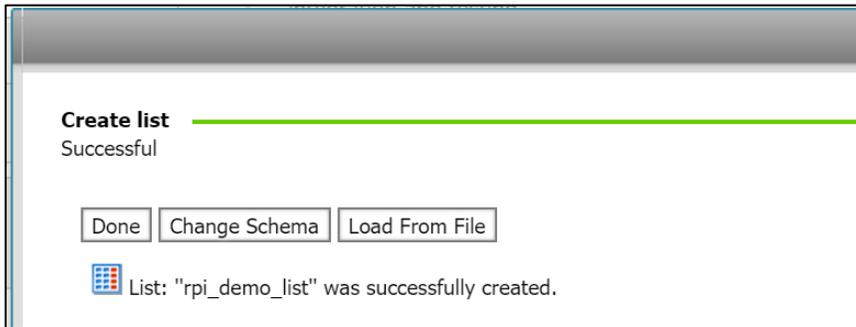
Save Cancel

Name:
Names cannot be longer than 100 characters and can include only the A-Z a-z 0-9 space ! - = @ _ [] { }

Folder:

Description:

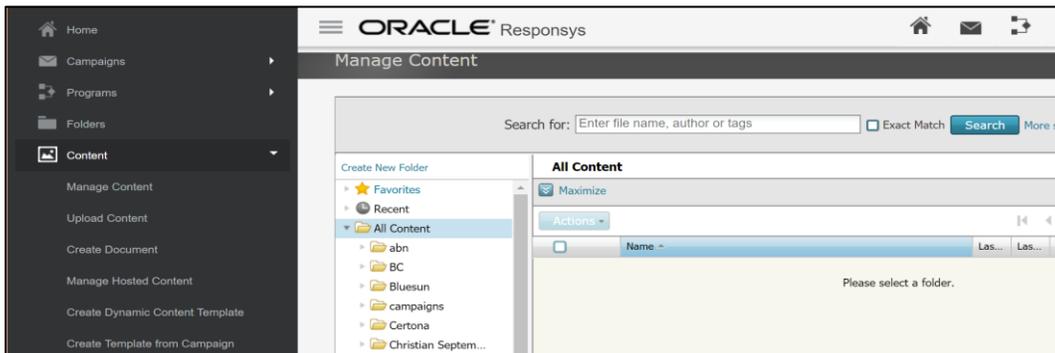
4. When an alert message appears, this confirms that the profile list was successfully created.



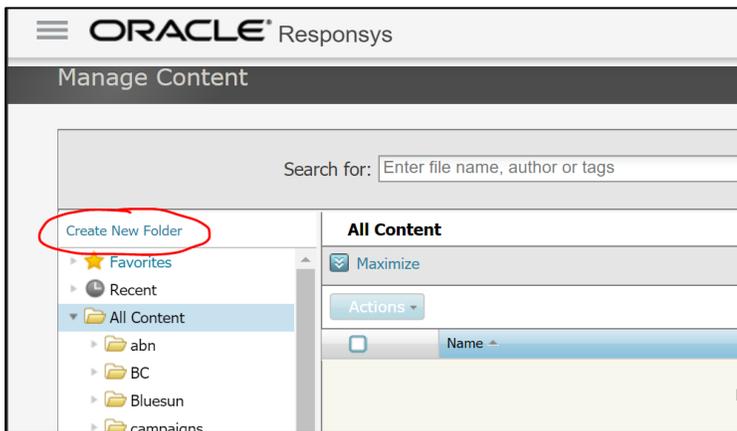
5. You need to take note of the profile list name as you will use this to configure the Profile list property at the RPI Responsys channel.

5.8.3 Creating the Content Folder

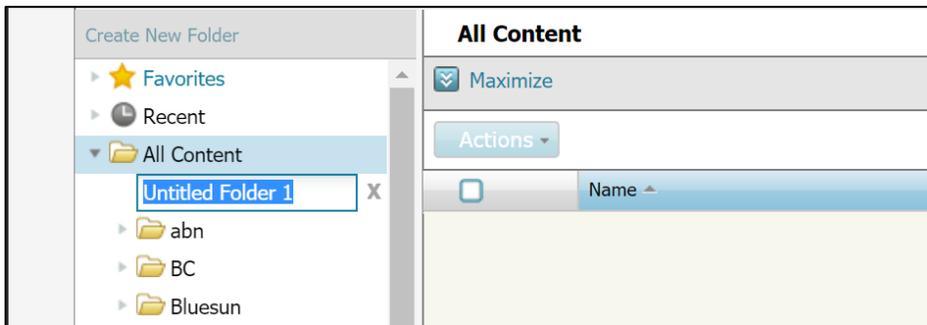
1. On the left side of the Responsys portal, click Content > Manage Content.



2. Click Create New Folder.



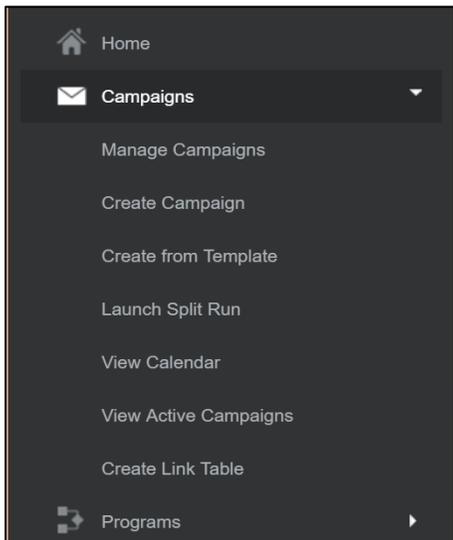
3. Enter the desired content folder name and press the Enter key to commit your changes.



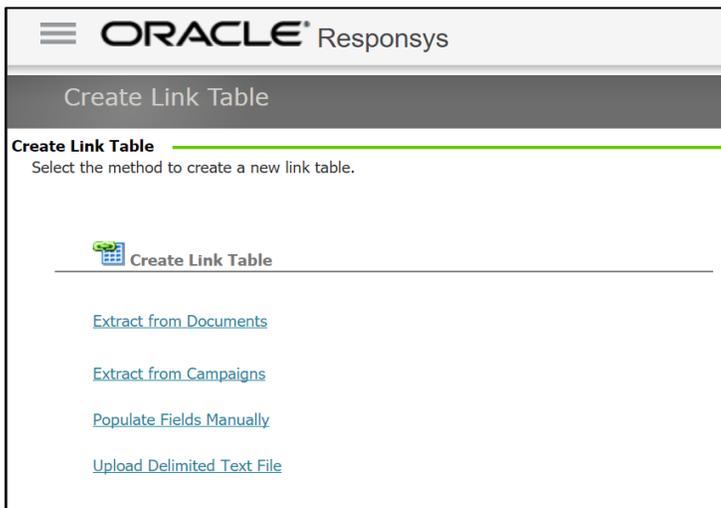
4. Take note of the content folder name as you will use this to configure the Root folder property at the RPI Responsys channel.

5.8.4 Creating the Link Table

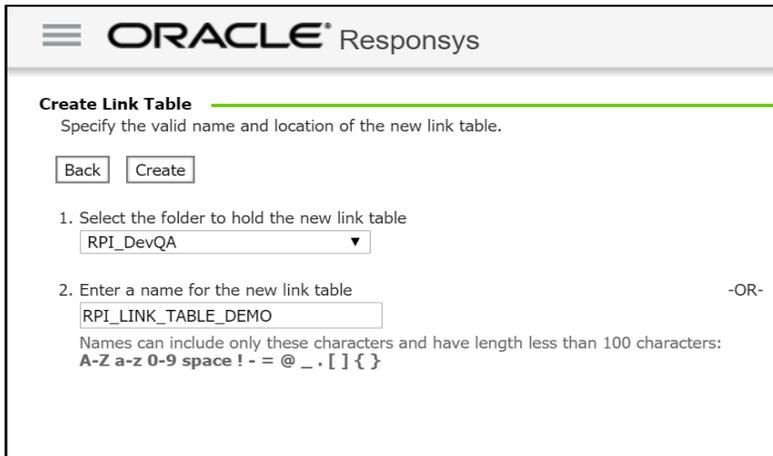
1. At the Responsys control menu, click Campaigns > Create Link Table.



2. Click Populate Fields Manually.



3. Select the folder and enter the desired link table name. Once you have finished, click Create.



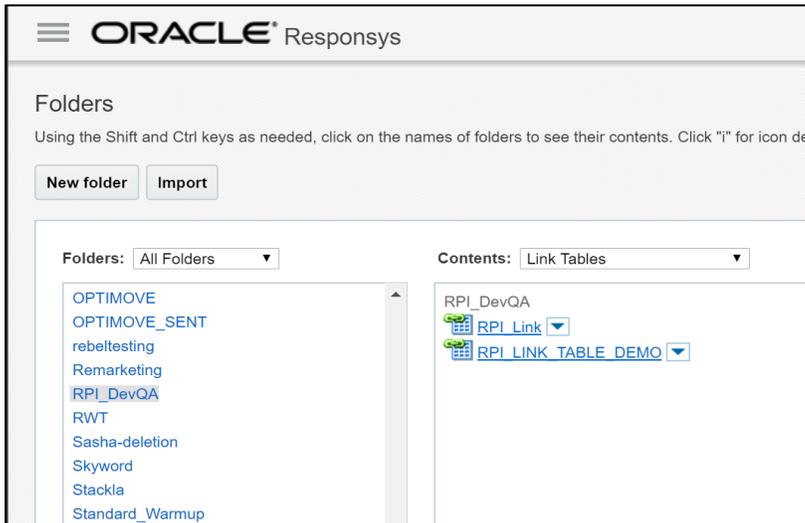
The screenshot shows the Oracle Responsys interface for creating a link table. At the top, there is a navigation menu with a hamburger icon and the text "ORACLE Responsys". Below this, the heading "Create Link Table" is followed by the instruction "Specify the valid name and location of the new link table." There are two buttons: "Back" and "Create". The first step is "1. Select the folder to hold the new link table", with a dropdown menu showing "RPI_DevQA". The second step is "2. Enter a name for the new link table", with a text input field containing "RPI_LINK_TABLE_DEMO" and a "-OR-" separator. Below the input field, there is a note: "Names can include only these characters and have length less than 100 characters: A-Z a-z 0-9 space ! - = @ _ . [] { }".

4. Take note of the link table name as you will use this to configure the Link table in Responsys channel plugin.

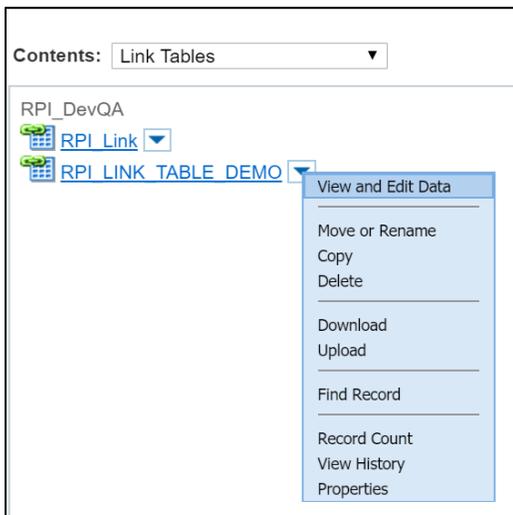
5.8.5 Adding links into the Link Table

To be able to track link clicks in an email campaign, you need to add links into the existing Link Table.

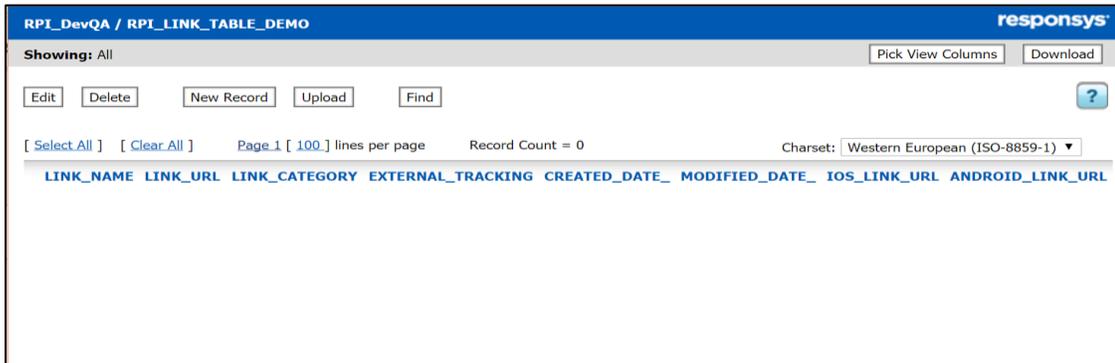
1. At the Responsys control menu, click Folders.
2. Select the folder where the link table is located.
3. Set the content filter to Link Tables



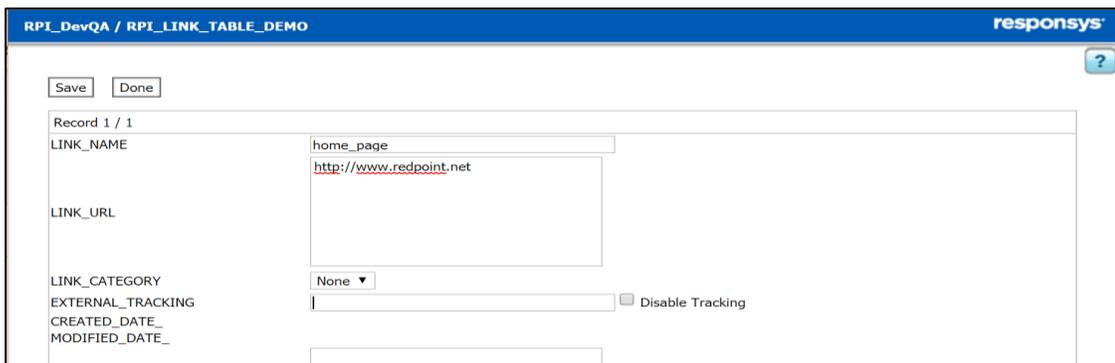
4. Click the down arrow on the left side of the link table, then click View and Edit Data.



5. Click New Record at the link table page.



6. Enter the link name and URL, then click Save when finished. Click Done to see the list of URLs added.



7. To add a URL parameter (e.g., "Gender"), use e.g., "http://www.Redpoint.net?gender=\${Gender}"
 \${Gender} denotes a ResponSys Personalization Language element, which facilitates the link's population with the recipient's gender.

5.8.6 Creating an Export Event Data Feed Job

1. At the Responsys control menu, click Data > Connect.
2. Click Create Job > Export Event Data Feed.

The screenshot shows the Oracle Responsys Connect interface. At the top, there's a navigation bar with the Oracle logo and 'Responsys' text. Below that, there are tabs for 'All Jobs', 'Completed Jobs', and 'Groups'. A search bar and filters for 'Group Name', 'Job Type', and 'Schedule Type' are visible. A table lists various jobs with columns for Job ID, Group, Name, Job Type, Run..., Next Run, and Pre... A 'Create Job' button is in the top right. A dropdown menu is open over the table, showing options like 'Import List Data', 'Import Supplemental Table Data', 'Import Profile Extension Data', 'Export Data', 'Export Event Data Feed', and 'Create Group'. The 'Export Event Data Feed' option is highlighted.

Job ID	Group	Name	Job Type	Run...	Next Run	Pre...
117...		xstest	Export List Data			201...
115...		Event Data Feed - Push	Export Feed Data		2017-09-14 07...	201...
115...		Event Data Feed - SMS	Export Feed Data		2017-09-14 07...	201...
115...		Event Data Feed - Email	Export Feed Data		2017-09-14 07...	2017-09-14 0...
114...		responsys_test_3_cleanup	Import Supplemental Data			On-demand Active
114...		responsys_test_1_cleanup	Import Supplemental Data			Recurring Inac...
106...		fr_daily_import	Import List Data			On-demand Active

3. Select the type of events for the export job then click Next.

The screenshot shows the Oracle Responsys Connect interface for configuring an 'Event Data Feed - Email' job. The page title is 'Event Data Feed - Email'. There are 'Back' and 'Next' buttons. A sidebar on the left contains a menu with options: 'Source', 'Target File', 'Options', 'Schedule', and 'Activate & Save'. The main content area has a heading 'Event Types' and a list of event types with checkboxes. The text above the list says: 'Select event types for this job. Each event type can only be used in one active job at a time. Those in gray are already requested by another active Export Job.' The event types listed are: 'Contact Interaction Events for Email' (with sub-items: Sent, Failed, Bounced, Clicked, Opened, Converted, Complained, Skipped), 'Contact Permission Events for Email' (with sub-items: Opted In, Opted Out), 'Contact Interaction Events for SMS' (with sub-items: Clicked, Converted, Failed, Delivered, Received, Sent, Skipped, MO Forward Sent, MO Forward Failed), and 'Contact Permission Events for SMS' (with sub-items: Opted In).

- Set the file specifications as below. Take note of the File Location Server, Username, and Path as you will use these to configure the FTP Credentials at the RPI Responsys channel. Click Next.

ORACLE Responsys

Connect

Event Data Feed - Email

Back Next

Source
Target File
Options
Schedule
Activate & Save

File Specifications

Character set of file: Unicode (UTF-8)

Fields are delimited by: Comma

Fields are enclosed by: "

Insert column header as first line:

Encryption/compression:

- Compress file
- Compress and encrypt file with PGP/GPG key: [Select or Import Key...](#)
- Do not encrypt or compress file

Additional Ready File at completion of download:

- Do not create
- Create empty file
- Create file with record count

File extension: done

File Location

Responsys File Server

Server: files.responsesys.net

Username: demo_scp

Path: download/event_data_feeds/email

Additional File Location

Not Selected

Responsys File Server

Additional File Location

Not Selected

Responsys File Server

- Select the notification option for export job activity. Click Next.

ORACLE Responsys

Connect

Event Data Feed - Email

Back Next

Source
Target File
Options
Schedule
Activate & Save

Notify by email after each failed or successful job run

Notify by email only after a failed job run

Do not notify

6. Set the frequency of the export job. Click Next.

ORACLE Responsys

Connect

Event Data Feed - Email

Back Next

Source
Target File
Options
Schedule
Activate & Save

Frequency of daily feed file export: 6 times a day ▼

7. Set the export job name. Make sure Activate is selected. Click Save.

ORACLE Responsys

Connect

Event Data Feed - Email

Back Save

Source
Target File
Options
Schedule
Activate & Save

Activate Deactivate

Name: Event Data Feed - Email

Description:

5.8.7 Obtain SSH2 Private and Public Keys

SSH2 private and public keys are used to authenticate users of Responsys' SFTP service. You need to contact your Responsys administrator if you wish to provision an SFTP account.

5.9 Salesforce Marketing Cloud (SFMC) Email Account Configuration

5.9.1 Provision an SFMC Core Account

1. Request core account with:
 - a. "Sender Authentication Package" (SAP)
 - b. "Automated Interaction Management" (AIM)
 - c. FTP user and password
2. Request disabling of the default headers and footers for the account
3. Request to enable "Extract Tracking"
4. Request to enable "Secure Link Wrapping"
5. Confirm that the back-end Business Rule called "Enhanced Sender Profiles" is enabled
6. Set Core Account password and provide to Operations for documenting in Master Passwords spreadsheet

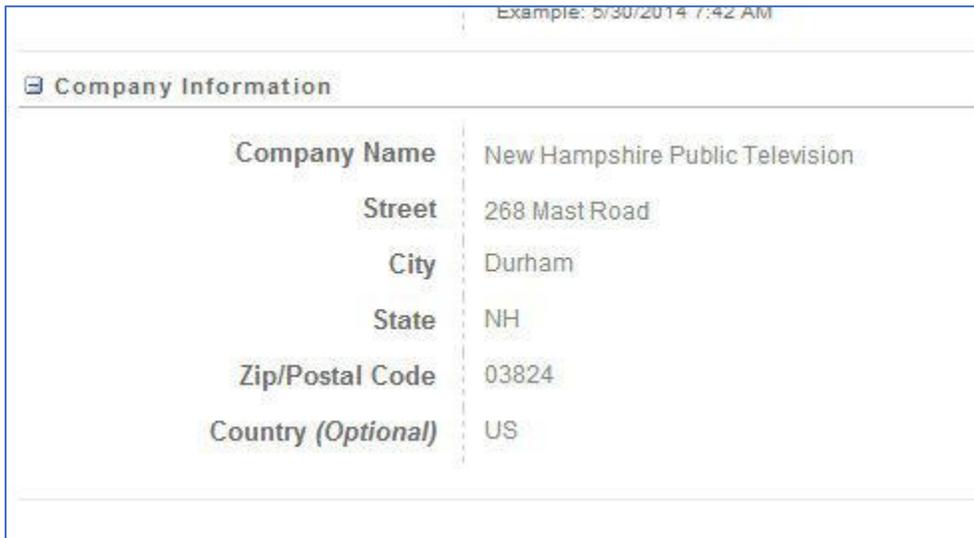
5.9.2 Post-Provisioning Steps

1. Set up RPI user for the channel configuration from Administration -> Users

The screenshot displays the 'Administration' console for a user named 'NHPTV System User'. The interface is divided into several sections:

- General Settings:** Fields for Name (NHPTV System User), Reply Email Address (rpi@redpoint.net), Notification Email Address (rpi@redpoint.net), Username (nhptv_rpi_usr), External Key (a2299d66-4f29-4666-bc94-96e38212d6d0), Time Zone ((GMT-05:00) Eastern Time (US & Canada) *), and Culture Code (English (United States)). Checkboxes for 'Enabled' and 'API User' are both checked.
- User Permissions:** A list of permissions with checkboxes. Checked permissions include 'Add Users to Account', 'Administrative Data Management', 'Grant the user access to the web services', and 'Manage Data Extension Data and Retention Policy'. Other permissions like 'Remove Access to Interactions', 'View Tracking Only', 'Remove Access to Lists', etc., are unchecked.
- Marketing Cloud Permissions and Roles:** Section 1 shows 'Select Applications for user:' with 'Email' and 'Automation Studio' checked. Section 2 shows 'Specify Marketing Cloud Roles for user:' with 'Marketing Cloud Administrator' selected via a radio button, and other roles like 'Marketing Cloud Content Editor/Publisher' and 'Marketing Cloud Viewer' unselected.

- Update Company Information from Administration -> Account Settings: (this defines the information that will be put into the merge fields in RPI)



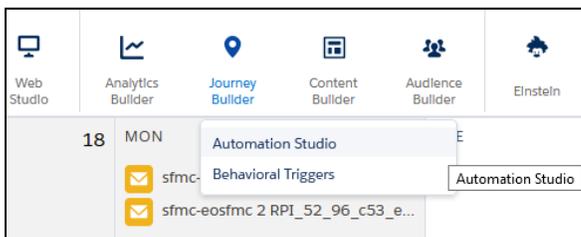
5.9.3 Configuring PGP Encryption for Events Data Extract

These sections describe the steps required to configure PGP encryption for the events data extract.

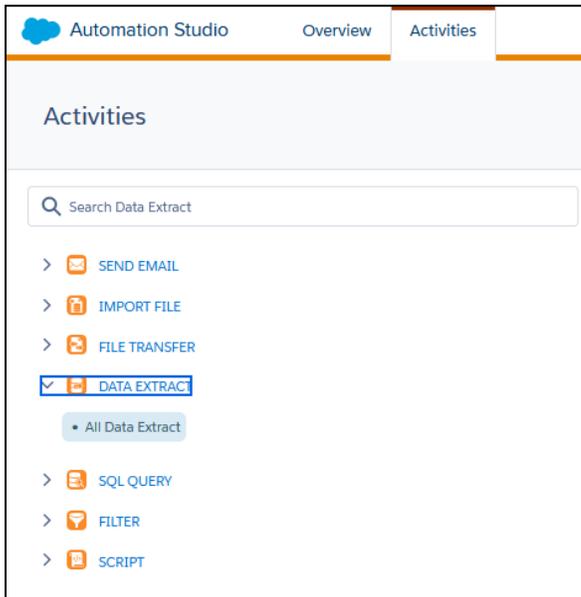
5.9.3.1 Creating Data Extract Activity

This section describes how to create Data Extract Activity from SFMC automation studio, which is used to pull email campaign event data from within RPI. Please follow the steps below:

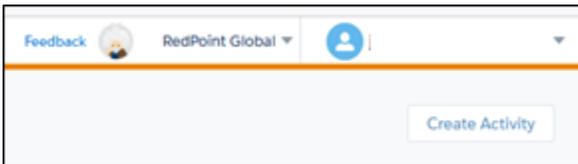
- Open the web browser and login to your SFMC account.
- In Salesforce Marketing Cloud main page, hover over *Journey Builder* menu and click *Automation Studio*



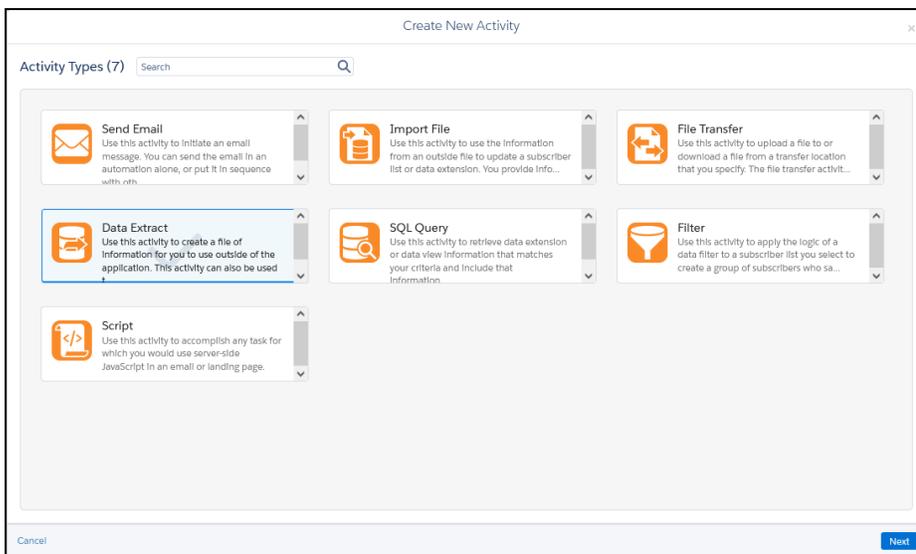
3. In Automation Studio main page, click **Activities** tab.



4. To create new **Data Extract** activity, click the **Create Activity** button located at the upper right corner of the Activities tab.



5. Select **Data Extract** activity and click **Next**.



6. In the **Properties** tab, provide values for the required text fields in the Data Extract activity.

The screenshot shows the 'Create New Data Extract Activity' dialog box with the 'PROPERTIES' tab selected. The fields are filled as follows:

- Name***: SFMC Channel DE
- Description**: Add description here...
- External Key**: (empty)
- File Naming Pattern***: RPI_EVENT_EXTRACT_SFMC_Channel_DE.zip
- Wildcard specifiers**: %%Year%%, %%Month%%, %%Day%%
- Extract Type***: Tracking Extract

- a. **Name*** - Descriptive name of the Data Extract activity
- b. **Description** - Additional information about the Data Extract activity
- c. **File Naming Pattern*** - A file name used when generating the exported email campaign event data. The file name has the following naming pattern:
RPI_EVENT_EXTRACT_<Channel Name>.zip
 The *<Channel Name>* suffix should match the Salesforce Marketing Cloud channel name configured in RPI. If one or more spaces in the channel name itself, it should be replaced by () underscore character when providing the file name. For example, if channel name is *SFMC Email DE*, file name must be set to *RPI_EVENT_EXTRACT_SFMC_Email_DE.zip*
- d. **Extract Type*** - Must always be set to *Tracking Extract*.

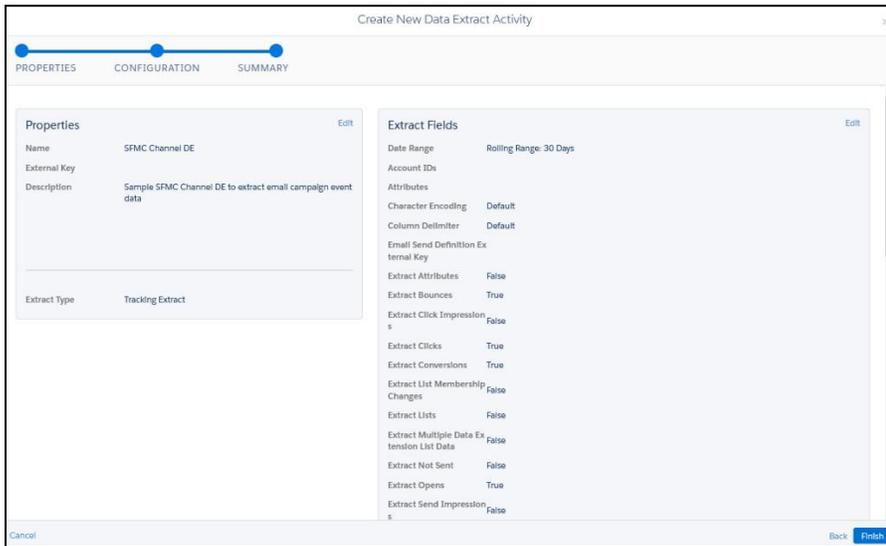
7. Click **Next**. In *Configuration* tab, configure the following.

- a. **Rolling Range*** – Value must be set to *30 Days*
- b. Other settings must remain with their default values. Click *Next*.

The screenshot shows the 'Create New Data Extract Activity' dialog box with the 'CONFIGURATION' tab selected. The 'Rolling Range' is set to '30 Days'. The 'All ranges 12AM to 12AM' section is expanded. The 'Extract' section has several checkboxes checked:

- Extract Bounces
- Extract Clicks
- Extract Conversions
- Extract Opens
- Extract Sent
- Extract Survey Responses
- Extract Unsubs
- Include Test Sends

- Finally, in the **Summary** tab, click **Finish** to create the Data Extract activity.



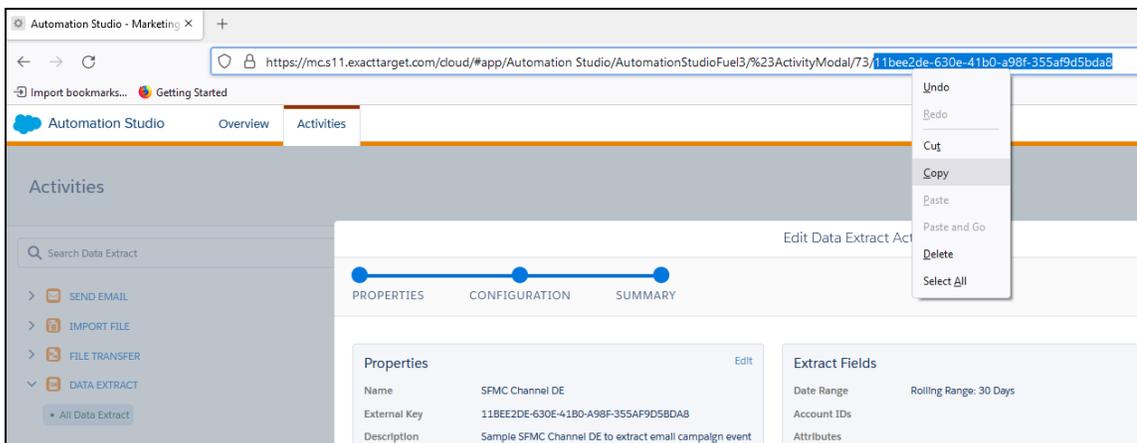
5.9.3.2 Copying Data Extract Activity ID

This section describes how to capture and copy the Data Extract Activity ID created in SFMC automation studio and used as a *Tracking extract activity ID* within the SFMC channel configuration settings in RPI. Please follow the steps below:

- Hover over and click the Data Extract activity created in the prior section, from Data Extract Activities list.

NAME	EXTERNAL KEY	DATE CREATED	DATE MODIFIED ↓
SFMC Channel DE	11BEE2DE-630E-41B0-A98F-355AF9D5BDA8	07/26/2021 1:08 PM	07/26/2021 1:08 PM

- In the address bar of your web browser, copy the Data Extract activity id that can be found in the link as shown below:



Typically, the URL will have the following format:

<https://mc.s11.exacttarget.com/cloud/#app/Automation%20Studio/AutomationStudioFuel3/%23ActivityModal/73/11bee2de-630e-41b0-a98f-355af9d5bda8>

The text highlighted in yellow is the assigned Data Extract activity ID.

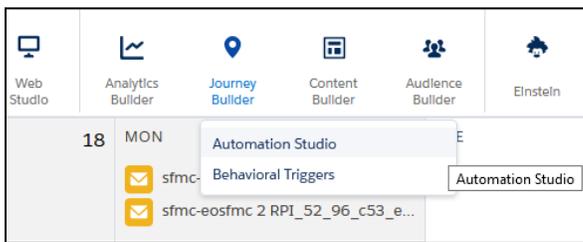
- Paste the value into *Tracking extract activity ID* field in your SFMC channel configuration settings.

Tracking extract activity ID:	<input type="text" value="11bee2de-630e-41b0-a98f-355af9d5bda8"/>	ID of tracking data extract activity configured in Salesforce Marketing Cloud
-------------------------------	---	---

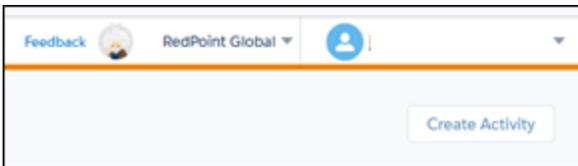
5.9.3.3 Creating File Transfer Activity

This section describes how to create the File Transfer Activity within SFMC automation studio, which is used to initiate the file move from the Safehouse. Please follow the steps below:

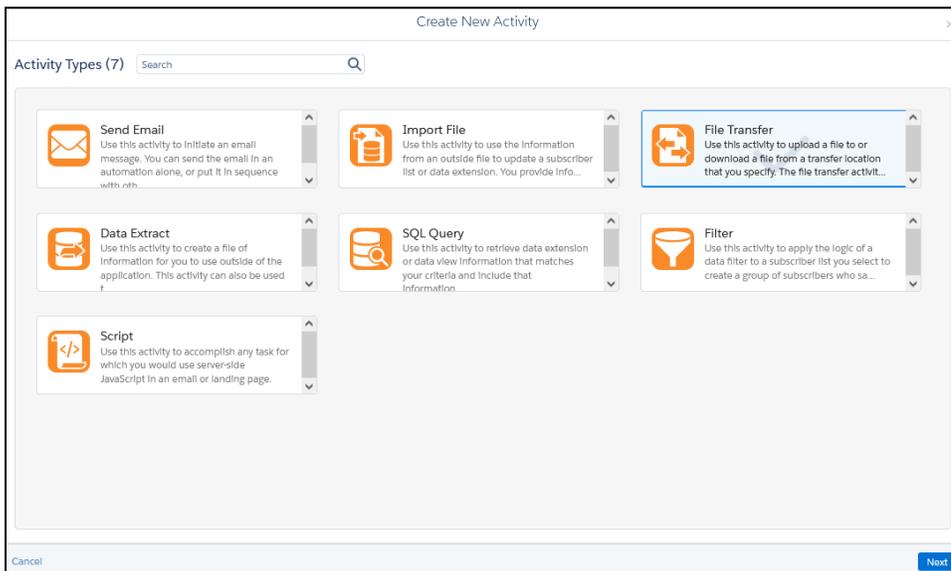
- Open the web browser and login to your SFMC account.
- On Salesforce Marketing Cloud main page, hover over on *Journey Builder* menu and click *Automation Studio*



- To create new *File Transfer* activity, click *Create Activity* located at the upper right corner of the Activities tab.



- Select *File Transfer* activity and click *Next*.



5. In **Properties** tab, provide the required text field values for the File Transfer activity

The screenshot shows a dialog box titled "Create New File Transfer Activity" with three tabs: PROPERTIES, CONFIGURATION, and SUMMARY. The PROPERTIES tab is active. It contains the following fields and options:

- Name***: A text input field containing "SFMC_Channel_DE".
- Description**: A text input field containing "Add description here...".
- External Key**: A text input field containing "SFMC_Channel_DE".
- File Action***: A section with two radio button options:
 - Manage File**: Unzip and/or decrypt a file found in the Marketing Cloud's Enhanced FTP directory.
 - Move a File From Safehouse**: Transfer file(s) from the Marketing Cloud's secure file storage location to a selected FTP location. This option is selected.

At the bottom of the dialog, there are "Cancel", "Back", and "Next" buttons.

- Name*** - Descriptive name of the File Transfer activity
- Description** - Additional information about the File Transfer activity
- External Key*** - Uniquely identifiable key name used to run File Transfer activity via RPI.
NOTE: Spaces in key name are not allowed.
- File Action*** - Must always be set to *Move a File From Safehouse*.

6. Click *Next*. In *Configuration* tab, configure the following.
 - a. **File Naming Pattern*** - A file name used when the exported file generated from a safe house to the destination SFTP folder. The file name has the following naming pattern:
RPI_EVENT_EXTRACT_<Channel Name>.zip
 The *<Channel Name>* suffix should match the Salesforce Marketing Cloud channel name configured in RPI. If one or more spaces in the channel name itself, it should be replaced by (_) underscore character when providing the file name.
 For example, if channel name is SFMC Email DE, file name must be set to *RPI_EVENT_EXTRACT_SFMC_Email_DE.zip*
 - b. **Destination*** - The SFTP export destination folder where the file is saved.
 - c. **Transfer Settings*** - Must always be set to *Encrypt File* and *PGP*.
 - d. **Customer Public Key** – Customer’s PGP public encryption key.

Properties CONFIGURATION SUMMARY

Move a File From Safehouse

File Naming Pattern* Use local time zone setting

Wildcard specifiers: %Year%, %Month%, %Day%

Destination*

Transfer Settings* Encrypt File

PGP
Use Pretty Good Privacy encryption to secure data in the file(s).

GPG
Use Gnu Privacy Guard encryption to secure data in the file(s).

Customer Public Key

Cancel Back Next

7. Click *Next*. In the *Summary* tab, click *Finish* to create the File Transfer Activity.

Properties CONFIGURATION SUMMARY

Properties Edit

Name SFMC_Channel_DE

External Key SFMC_Channel_DE

Description

File Action Move a File From Safehouse

Configuration Edit

File Naming Pattern RPI_EVENT_EXTRACT_SFMC_Channel_DE.zip

Destination ExactTarget Enhanced FTP Export

Transfer Settings Encrypt File

PGP

Public Key RPI_SFMC_Test3

Cancel Back Finish

8. The *External Key* in *File Transfer* activity will be used as *File transfer activity name* in SFMC channel configuration in RPI as shown below:

File transfer activity name: The name of file transfer activity configured in Salesforce Marketing Cloud

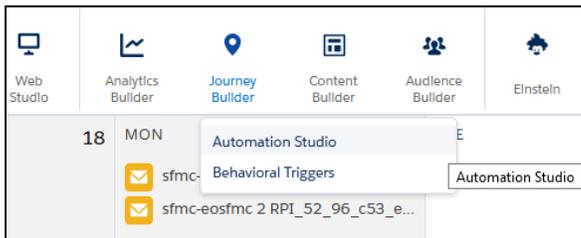
5.9.4 Configuring PGP Encryption for Data Extension Extracts

These sections describe the steps required to configure PGP encryption for the data extracts used to create the data extension.

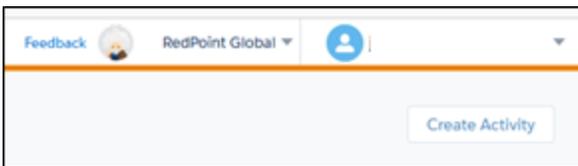
5.9.4.1 Creating File Transfer Activity

This section describes how to create the File Transfer Activity within SFMC automation studio, which will be used to decrypt the file after landing in the SFMC FTP Import folder. Please follow the steps below:

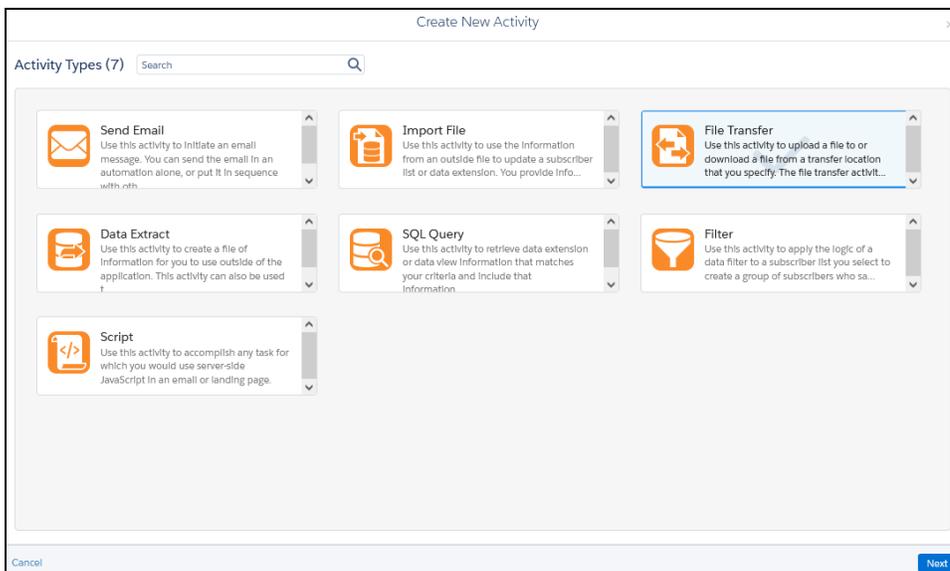
9. Open the web browser and login to your SFMC account.
10. On Salesforce Marketing Cloud main page, hover over on *Journey Builder* menu and click *Automation Studio*



11. To create new *File Transfer* activity, click *Create Activity* located at the upper right corner of the Activities tab.



12. Select *File Transfer* activity and click *Next*.



13. In **Properties** tab, provide the required text field values for the File Transfer activity

The screenshot shows the 'Edit File Transfer Activity' dialog box with the 'PROPERTIES' tab selected. The dialog has three tabs: 'PROPERTIES', 'CONFIGURATION', and 'SUMMARY'. The 'PROPERTIES' tab contains the following fields and options:

- Name***: A text input field containing 'RPI_Test_FTA'.
- Description**: A text input field containing 'Add description here...'.
- External Key**: A text input field containing 'RPI_Test_FTA'.
- File Action***: A dropdown menu with two options:
 - Manage File**: Unzip and/or decrypt a file found in the Marketing Cloud's Enhanced FTP directory. This option is selected.
 - Move a File From Safehouse**: Transfer file(s) from the Marketing Cloud's secure file storage location to a selected FTP location.

At the bottom of the dialog, there are 'Cancel', 'Back', and 'Next' buttons.

- Name*** - Descriptive name of the File Transfer activity
- Description** - Additional information about the File Transfer activity
- External Key*** - Uniquely identifiable key name used to run File Transfer activity via RPI.
NOTE: Spaces in key name are not allowed.
- File Action*** - Must always be set to *Manage File*

14. Click *Next*. In *Configuration* tab, configure the following.

- a. **File Naming Pattern*** - this is used to find the PGP file created by RPI. It must have the following format: <external-key-name>_%%Year%%%%Month%%%%Day%%.txt.pgp

For example, if the external key configured in step 13c is called "RPI_Test_FTA", the file name convention would be **RPI_Test_FTA_%%Year%%%%Month%%%%Day%%.txt.pgp**

%%Year%% = wildcard for year the file was created
%%Month%% = wildcard for month the file was created
%%Day%% = wildcard for day the file was created

- b. **Source File Location*** - leave it as *ExactTarget Enhanced FTP*
- c. **File Management Actions** – enable the *Decrypt file* option
- d. **Customer Public Key** – Customer's PGP public encryption key

The screenshot shows the 'Edit File Transfer Activity' configuration window with the 'CONFIGURATION' tab selected. The 'Manage File' section contains the following settings:

- File Naming Pattern***: RPI_Test_FTA_%%Year%%%%Month%%%%Day%%.txt.pgp. Below the input field, it lists wildcard specifiers: %%Year%%, %%Month%%, %%Day%%. There is a checkbox for 'Use local time zone setting' which is currently unchecked.
- Source File Location***: ExactTarget Enhanced FTP (selected in a dropdown menu).
- File Management Actions**:
 - Unzip compressed file
 - Decrypt file
- Customer Private Key**: Marketing Cloud Key (with a 'Learn More' link).
- Qualifications**:
 - Skip if last transfer occurred less than the following number of hours ago: 0
 - Fail the transfer if file is older than the following number of hours: 0
 - System buffer (hours): 0

At the bottom of the window, there are 'Cancel', 'Back', and 'Next' buttons.

15. Click *Next*. In the *Summary* tab, click *Finish* to create the File Transfer Activity.

The screenshot shows the 'Edit File Transfer Activity' dialog box with the 'SUMMARY' tab selected. A progress bar at the top indicates the current step. The dialog is divided into two main sections: 'Properties' and 'Configuration', each with an 'Edit' link. The 'Properties' section shows 'Name' and 'External Key' both set to 'RPI_Test_FTA', and 'File Action' set to 'Manage File'. The 'Configuration' section shows 'File Naming Pattern' as 'RPI_Test_FTA_%%Year%%Month%%Day%%.txt.pgp', 'Source File Location' as 'ExactTarget Enhanced FTP', 'File Management Actions' as 'Decrypt file', and 'Customer Private Key' as 'Marketing Cloud Key'. At the bottom right, there are 'Back' and 'Finish' buttons.

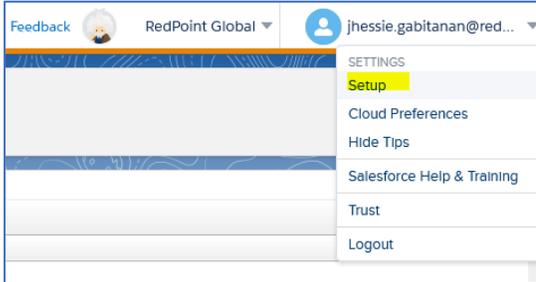
16. The *External Key* in *File Transfer* activity will be used as *File transfer activity name* in SFMC channel configuration in RPI as shown below:

The screenshot shows the 'File Encryption Options' section. It includes the following fields and options:

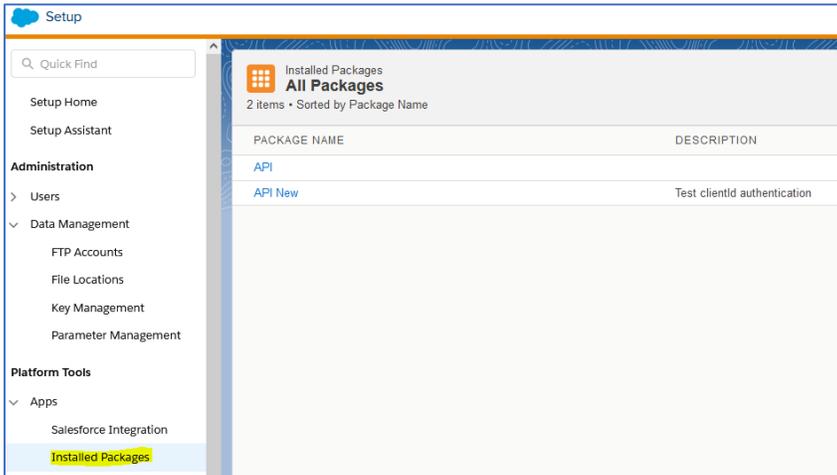
- Encrypt exported file:** If set, the exported file will be encrypted
- Encryption type:** Pretty Good Privacy (PGP) The type of encryption that will be used to encrypt the file
- Encryption public key:** Public Key - ET public key.txt The public key used to encrypt exported file
- File transfer activity name:** RPI_Test_FTA The name of file transfer activity configured in Salesforce Marketing Cloud

5.9.5 Enabling OAuth Authentication for SFMC

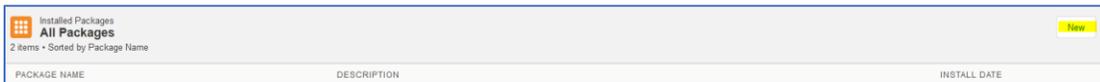
1. Open the web browser and login to your SFMC account.
2. From the Settings menu, click Setup



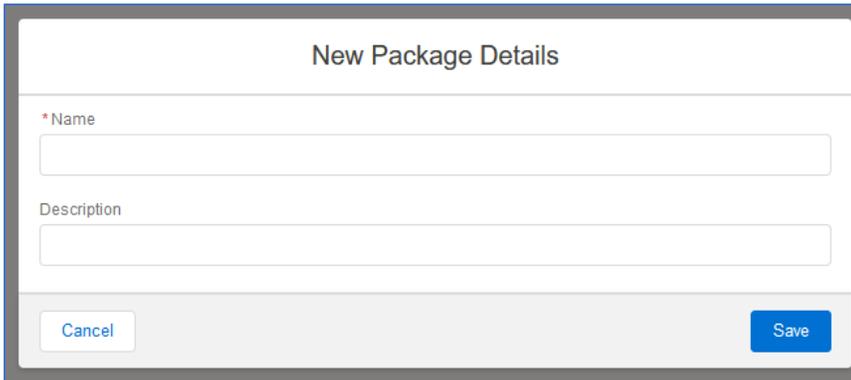
3. On Setup tab, expand Apps under Platform Tools group setting. Click Installed Packages.



4. To create new OAuth package, Click the “New” button.

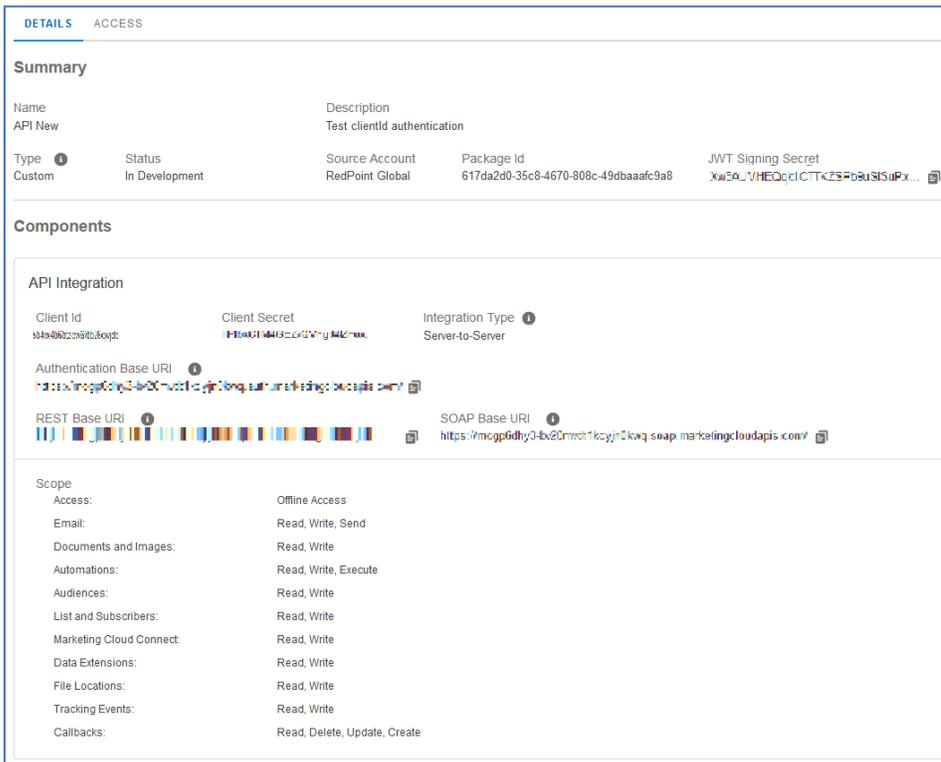


5. Provide the name and description of the new OAuth package. Click “Save” button:



The image shows a form titled "New Package Details". It has two input fields: one for "Name" and one for "Description". At the bottom of the form, there are two buttons: "Cancel" on the left and "Save" on the right.

6. Below is an example of the Details Summary for a newly created OAuth package.



The image shows a "Details Summary" page for an OAuth package. The page has two tabs: "DETAILS" (selected) and "ACCESS". The "Summary" section contains the following information:

Name	Description
API New	Test clientId authentication

Type	Status	Source Account	Package Id	JWT Signing Secret
Custom	In Development	RedPoint Global	617da2d0-35c8-4670-808c-49dbaaaf9a8	Xu3ALVHEQqclCTKZS#b8uSISuP...

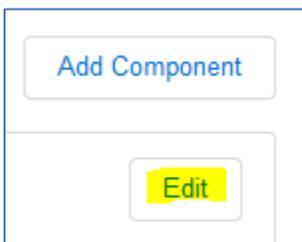
The "Components" section shows the following details:

- API Integration**
- Client Id: [Redacted]
- Client Secret: [Redacted]
- Integration Type: Server-to-Server
- Authentication Base URI: [Redacted]
- REST Base URI: [Redacted]
- SOAP Base URI: https://mcapi03-bv20mwt1kcyjncwq.soap.marketingcloudapis.com/

The "Scope" section lists the following permissions:

Scope	Access
Access:	Offline Access
Email:	Read, Write, Send
Documents and Images:	Read, Write
Automations:	Read, Write, Execute
Audiences:	Read, Write
List and Subscribers:	Read, Write
Marketing Cloud Connect:	Read, Write
Data Extensions:	Read, Write
File Locations:	Read, Write
Tracking Events:	Read, Write
Callbacks:	Read, Delete, Update, Create

7. Modify the default scope of the OAuth package by clicking the “Edit” button:



8. In the Edit dialog, select the appropriate API permissions for the OAuth package. Click the “Save” button:

Edit

Set Server-to-Server Properties

Scope

CHANNELS

Email	OTT	Push	SMS	Social
<input checked="" type="checkbox"/> Read	<input type="checkbox"/> Read	<input type="checkbox"/> Read	<input type="checkbox"/> Read	<input type="checkbox"/> Read
<input checked="" type="checkbox"/> Write	<input type="checkbox"/> Send	<input type="checkbox"/> Write	<input type="checkbox"/> Write	<input type="checkbox"/> Write
<input checked="" type="checkbox"/> Send		<input type="checkbox"/> Send	<input type="checkbox"/> Send	<input type="checkbox"/> Publish
				<input type="checkbox"/> Post

Web

Read
 Write
 Publish

ASSETS

Documents and Images	Saved Content
<input checked="" type="checkbox"/> Read	<input type="checkbox"/> Read
<input checked="" type="checkbox"/> Write	<input type="checkbox"/> Write

AUTOMATION

Automations	Journeys
<input checked="" type="checkbox"/> Read	<input type="checkbox"/> Read
<input checked="" type="checkbox"/> Write	<input type="checkbox"/> Write
<input checked="" type="checkbox"/> Execute	<input type="checkbox"/> Execute
	<input type="checkbox"/> Activate/Stop

Cancel
Save

9. Below are the default OAuth scopes, required by Redpoint Interaction:

Scope	
Access:	Offline Access
Email:	Read, Write, Send
Documents and Images:	Read, Write
Automations:	Read, Write, Execute
Audiences:	Read, Write
List and Subscribers:	Read, Write
Marketing Cloud Connect:	Read, Write
Data Extensions:	Read, Write
File Locations:	Read, Write
Tracking Events:	Read, Write
Callbacks:	Read, Delete, Update, Create

10. Within the configuration of the SFMC Email and Data Transfer channels, enable “Use OAuth authentication” and enter the Client Id and Client secret values, as shown on the Details Summary page in the SFMC portal.

Use OAuth authentication: If set, OAuth authentication used to connect Salesforce Marketing Cloud service

Client ID: Client ID used to connect Salesforce Marketing Cloud service

Client secret: Client secret used to connect Salesforce Marketing Cloud service

5.10 DotDigital Account Configuration

5.10.1 Creating a Free DotDigital Account

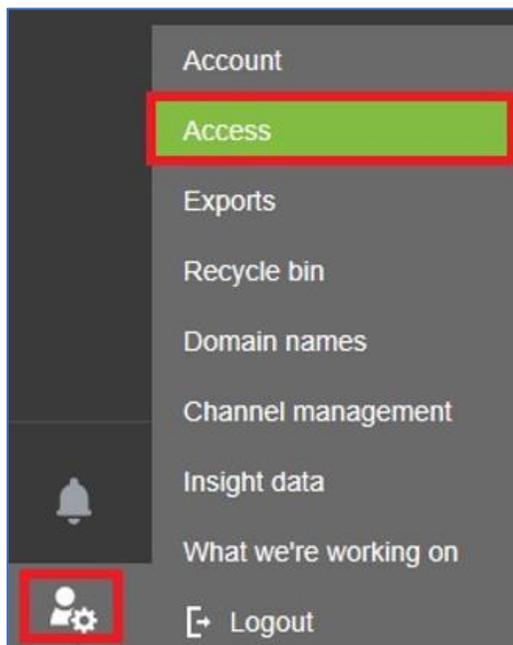
This section describes how create a free DotDigital account (if required). Please follow the steps below:

1. Browse to the DotDigital website: <https://www.dotDigital.com/>.
2. To acquire a free trial account, click Free Trial.
3. Complete the form and click Submit.
4. An email will be sent to your email inbox for verification.

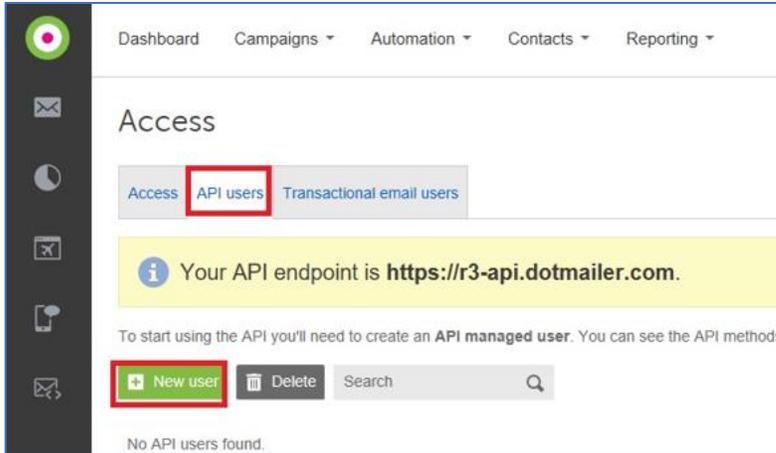
5.10.2 Create API user

This section describes how to create an API user to connect to the DotDigital service. Please follow the steps below:

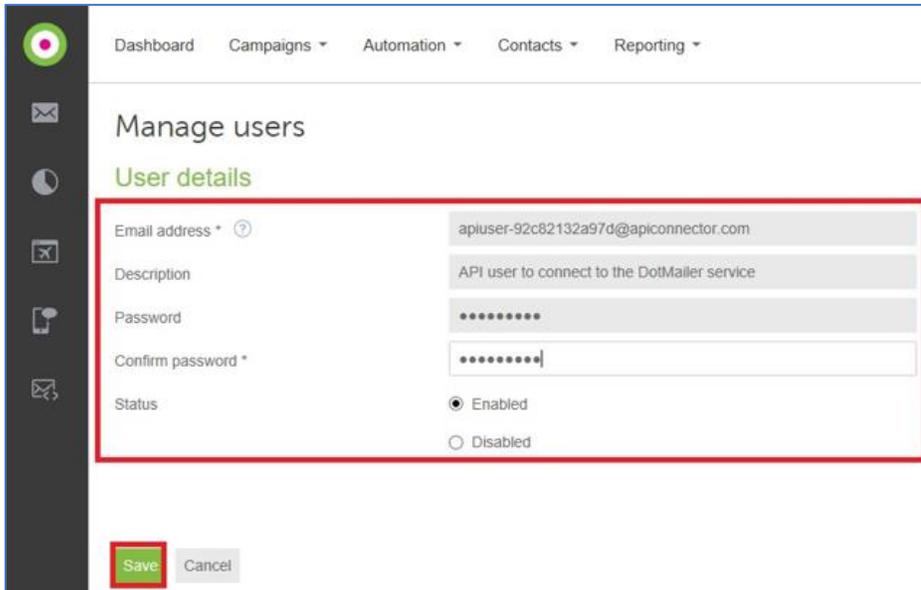
1. Open the DotDigital portal at <https://login.dotdigital.com/>
2. Click the lower leftmost icon, then choose Access.



3. Go to the API users tab, then click New User.



4. Complete the form, and press Save when done.



5.10.3 Setting Up External Dynamic Content

This section describes how to set up a public facing URL to use for RPI dynamic content. Please follow the steps below:

1. In Windows Explorer, open the RPI deployment files folder. Go to the Plugin Services folder.
2. Copy the DotDigitalEdcService folder, then paste it into the 'C:\inetpub' folder.
3. Open IIS.
4. Right-click Sites, then select Add Web Site.
5. Complete the details as shown below. You may need to use another port number if port 80 is already in use.

The screenshot shows the 'Add Website' dialog box in IIS Manager. The 'Site name' field is set to 'DotMailerEdcService'. The 'Application pool' is set to 'DotMailerEdcService'. The 'Physical path' in the 'Content Directory' section is set to 'C:\inetpub\DotMailerEdcService'. The 'Port' in the 'Binding' section is set to '80'. The 'Start Website immediately' checkbox is checked.

6. Press OK to save the new website.

5.10.4 Configure External Content Shared Folder

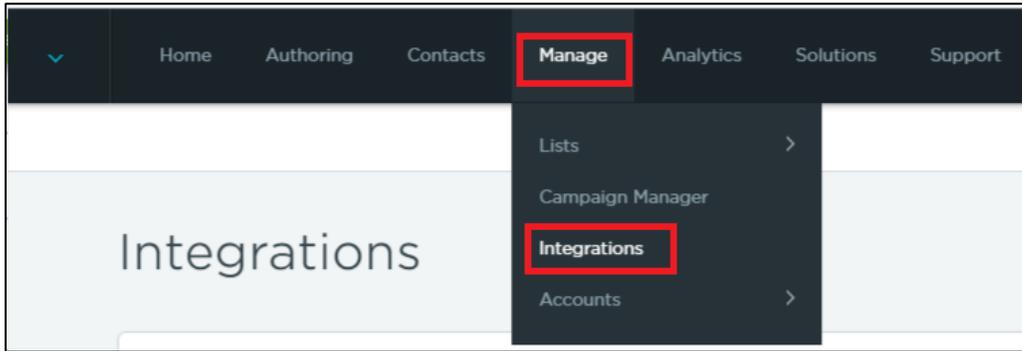
This section describes how to configure an external content shared folder for use by DotDigital. Please follow the steps below:

1. Login to RPI Server Workbench.
2. In the Configuration tab, locate the DotmailerExternalDynamicContentSharedFolderPath setting and specify a shared folder path.
3. Save your change.

5.11 Listrak Account Configuration

This section describes how to create configure Listrak for use with RPI. Please follow the steps below:

1. Log into the Listrak portal at <https://admin.listrak.com/Account/Login.aspx>.
2. Navigate to Manage > Integrations



3. In the New Integration form, Complete the following details:
 - Integration Name
 - Integration Type: set to 'API: Email'
 - Access Levels: check List, Contact and Message
 - Add your machine IP address to the IP Address Whitelist
 - Copy the Client ID and Client Secret to a text file

The screenshot shows the 'New Integration' form. The form is divided into two columns. The left column contains fields for Integration Name, Integration Type, Access Levels, Client ID, and Client Secret. The right column contains the IP Address Whitelist section, including a text input for IP Address Type and a table listing whitelisted IP addresses. Red boxes highlight the Integration Name, Integration Type, Access Levels, IP Address Type input, and the SAVE button.

New Integration

Integration Name: My Integration

Integration Type: API: Email

Enable Whitelisting

Access Levels:

- List
- Message
- Contact
- Event
- Segmentation
- Report

Please ensure secure storage of these integration credentials.

Client ID: [Redacted]

Client Secret: [Redacted]

IP Address Whitelist

When enabled, all IP addresses will be blocked from API access except those listed below. One IP address is required per integration, with a maximum of 10 IP addresses allowed per integration. IP address ranges must have matching values for the two leftmost octets of their component addresses.

IP Address Type: Single IP Address Wildcard Match IP Address Range

Ex: 123.45.67.89 [Add]

IP ADDRESS	TYPE
123.45.67.89	Single

[SAVE] Cancel

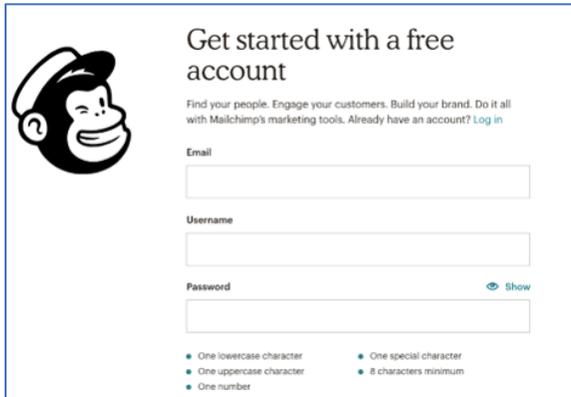
4. Save your changes.

5.12 Mailchimp Account Configuration

5.12.1 Create a Mailchimp Account

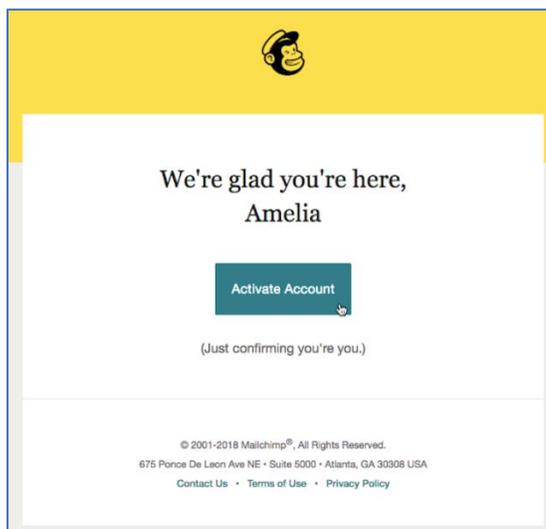
This section describes how create an account in Mailchimp. Please follow the steps below:

1. Visit the Mailchimp sign-up page by navigating to <https://login.mailchimp.com/signup> in a web browser.
2. Provide your email address, username, and password. Click **Get Started**.

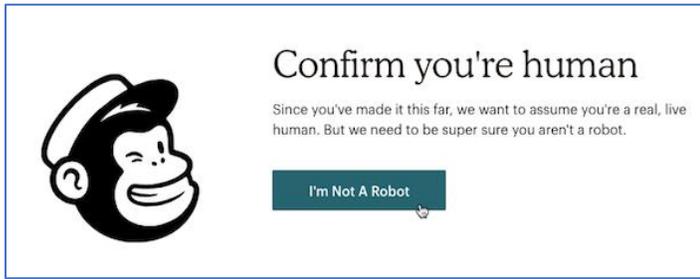


The image shows the Mailchimp sign-up page. On the left is the Mailchimp monkey logo. The main heading is "Get started with a free account". Below this is a sub-heading: "Find your people. Engage your customers. Build your brand. Do it all with Mailchimp's marketing tools. Already have an account? [Log in](#)". There are three input fields: "Email", "Username", and "Password". The "Password" field has a "Show" toggle. Below the fields are four bullet points: "One lowercase character", "One uppercase character", "One number", "One special character", and "8 characters minimum".

3. A confirmation message will be displayed. Check your mail inbox for the account activation email to complete your account setup.
4. Open the account activation email and click **Activate Account**.



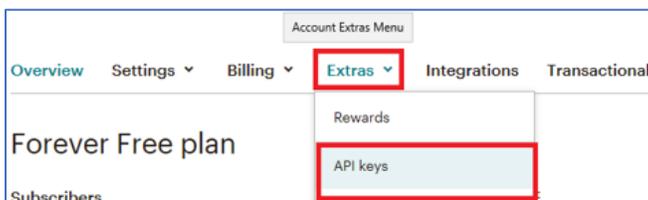
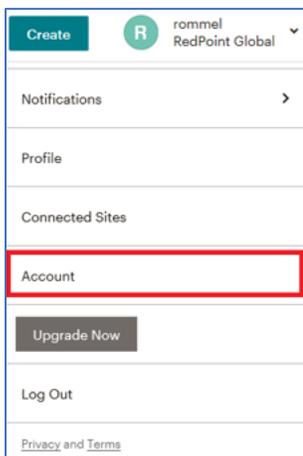
5. In the Confirmation screen, check the **I'm not a robot** checkbox, and click **Confirm Signup**.



5.12.2 Provision a New API Key

This section describes how to create an API user to connect to Mailchimp service. Please follow the steps below:

1. In a web browser, navigate to <https://login.mailchimp.com/> to log in.
2. Enter username and password and click the Login button.
3. Under account profile, navigate to **Account > Extras** and select *API Keys* from the dropdown list.

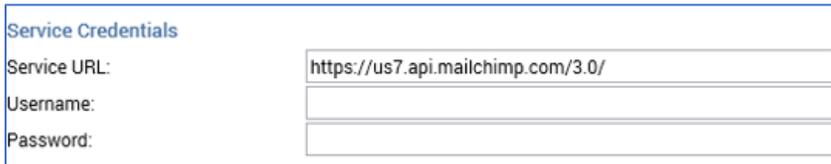


4. Click the Create a key button to create the new API key.

5.12.3 Configuring the Service URL

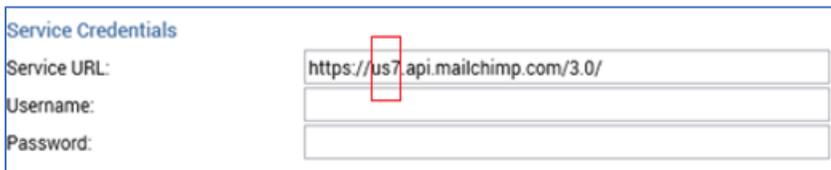
This section describes how to setup the service URL in the RPI Mailchimp channel configuration via, if the MailChimp account was provisioned outside the United States region. Please follow the steps below.

1. When creating new MailChimp channel, the default service URL is <https://us7.api.mailchimp.com/3.0/> as shown below.

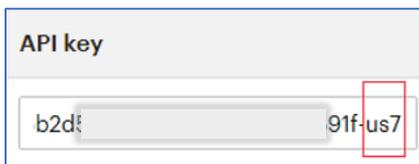


The screenshot shows a form titled "Service Credentials" with three input fields. The "Service URL" field contains the text "https://us7.api.mailchimp.com/3.0/". The "Username" and "Password" fields are empty.

2. You must change the first three characters that appear in the host name of the service URL to the last three characters that appear in the API key.



The screenshot shows the same "Service Credentials" form. A red rectangular box highlights the characters "us7" in the "Service URL" field, indicating the characters to be replaced.

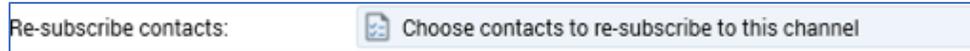


The screenshot shows a form titled "API key" with a single input field containing the text "b2d: 91f-us7". A red rectangular box highlights the characters "91f-us7" at the end of the string, indicating the characters to be used for replacement.

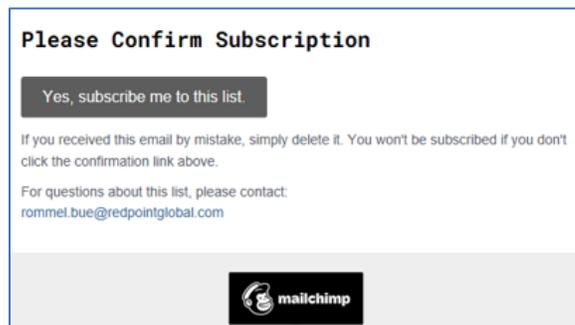
5.12.4 Re-subscribe Contacts

This section describes how to re-subscribe contact(s) via RPI when using Mailchimp. Please follow the steps below:

1. In the MailChimp channel configuration interface, click **Choose contacts to re-subscribe to this channel**.



2. Add one or more email addresses and click **OK**.
3. If re-subscription was successful, a confirmation email will be sent to your email inbox.
4. Open the confirmation email, and click the **Yes, subscribe me to this list** button.



5.13 Cordial Account Configuration

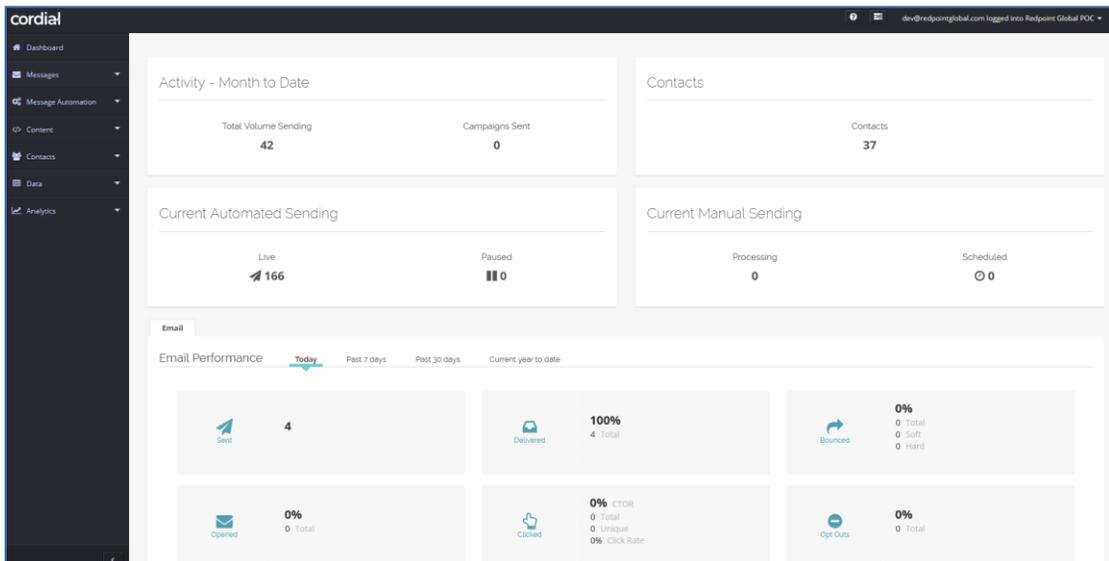
5.13.1 Sign Into Cordial Portal

This section describes how to sign into the Cordial portal. Please follow the steps below:

1. In a web browser, navigate to <https://admin.cordial.io/#login>.
2. Sign in by providing your Cordial credentials. Click **Log me in**.

© 2021 Cordial Inc.

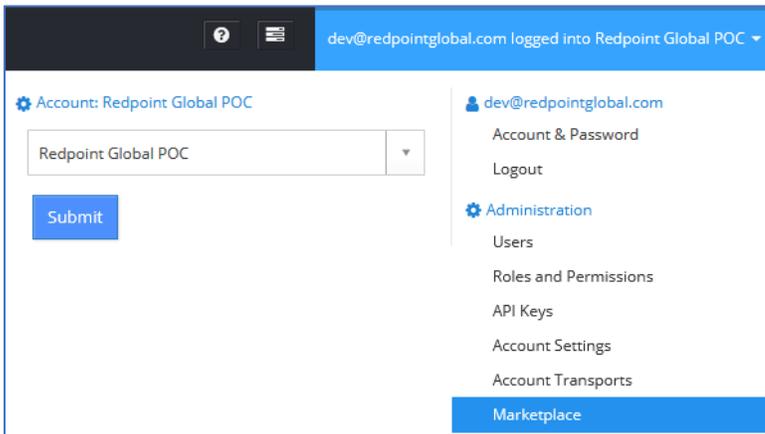
3. Once you have successfully logged on, you will be redirected to the Cordial dashboard.



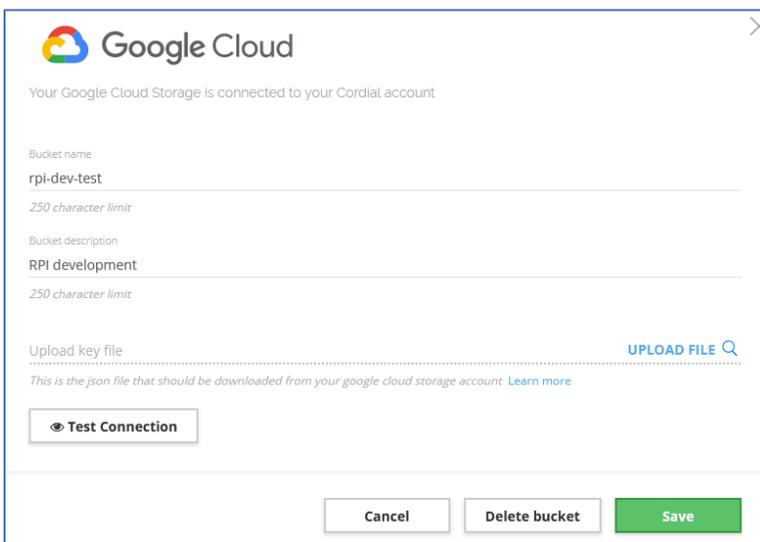
Service Credentials	
Service URL:	<input type="text" value="https://api.cordial.io"/> API service URL used to connect to Cordial service
API key:	<input type="text"/> API Key used when connecting to Cordial

5.13.3 Enable Google Cloud services

1. In the Cordial portal, navigate to **Administration > Marketplace**. You can find this option by clicking on your username.



2. Look for Google Cloud and click **Enable**.

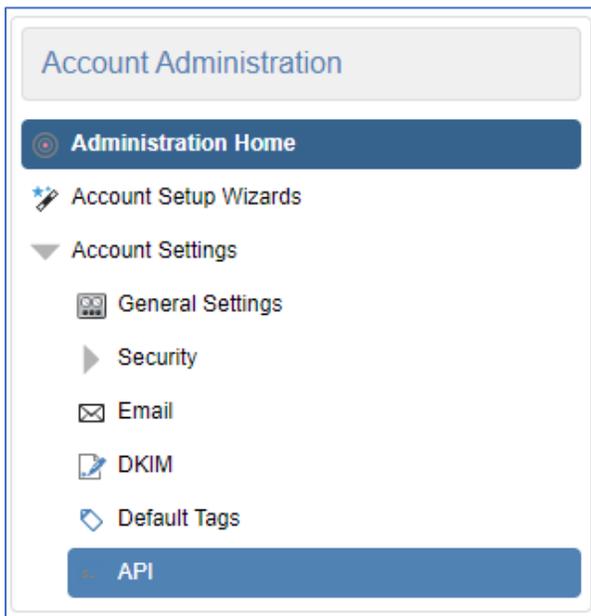


3. Provide valid entries of Google Cloud service and click **Save**.

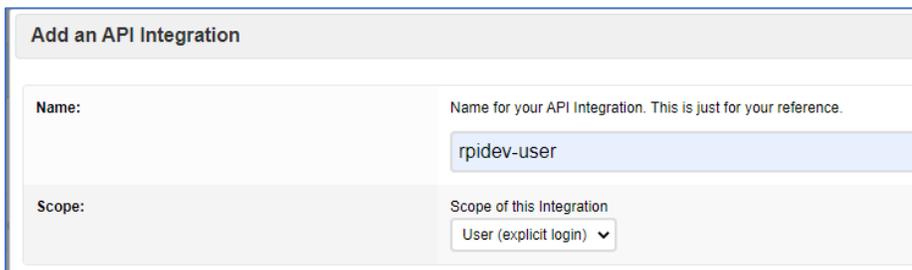
5.14 LuxSci Account Configuration

5.14.1 Create API Integration

1. In a web browser, navigate to <https://luxsci.com/perl/member/members.pl>.
2. Log into your account as an account administrator.
3. Navigate to "Account Administration".
4. Open "Account Settings > API".



5. Click "Add an API Integration".
 - a. Enter a name for the Integration
 - b. Select a "scope"
 - c. Click "Create Integration"

A screenshot of the "Add an API Integration" form. The form has a title "Add an API Integration" at the top. It contains two main sections. The first section is labeled "Name:" and has a text input field containing "rpidev-user". To the right of the input field is a small text label: "Name for your API Integration. This is just for your reference." The second section is labeled "Scope:" and has a dropdown menu. The dropdown menu is currently set to "User (explicit login)" and has a downward arrow icon.

5.14.2 Retrieve API Integration Keys

11. In a web browser, navigate to <https://luxsci.com/perl/member/members.pl>.
12. Log into your account as an account administrator.
13. Navigate to "Account Administration".
14. Open "Account Settings > API".
15. Locate the API Integration.
16. Click on the Pencil icon to view/edit the API Integration details.
17. Under Access Controls, ensure the following settings are checked:
 - a. View Reports
 - b. Read access
 - c. Write access
 - d. SMTP/API Templates
 - e. Sending
 - f. Suppression

EDIT API INTEGRATION

API Name: QA

Secret Key: Show Key

Public Token: dynapwA+19t

API Host: rest.luxsci.com

Enable?: YES

Scope: User (explicit login)

Access Controls: User-Level Command Access

User General:

- Single Sign-On
- View Reports

User Settings:

- Read access
- Write access
- Change passwords

Email:

- Forwarding
- Auto-Responders
- SMTP/API Templates
- Sending
- Suppression

18. Save the API Host, Public Token, and Secret Key, as you will need this to configure the LuxSci channel in RPI.

NOTE: The default endpoint host for LuxSci is **rest.luxsci.com**, which is shared resource for pooling of email activity by multiple LuxSci clients. However, if you are using a dedicated server, your host name may be different. The above screenshot will provide the host name to configure in the RPI channel.

5.14.3 Enable Event Tracking

19. In a web browser, navigate to <https://luxsci.com/perl/member/members.pl>.
20. Log into your account as an account administrator.
21. Navigate to "Account Administration".
22. Open "Account Settings > Email Settings".
23. Toggle the following settings to "ON"
 - a. Bounce Processing
 - b. Open Tracking
 - c. URL Click Tracking

The screenshot displays the LUXSCI Account Administration interface. The top navigation bar includes 'Workspaces', 'Account', 'Email', 'Apps', 'Help', and 'Logout'. A notification banner states, 'You have not yet enabled two-factor authentication. Administrative logins need extra protection.' with an 'Update Your Settings' button.

The left sidebar shows 'ACCOUNT ADMINISTRATION' with a menu including 'Administration Home', 'Account Setup Wizards', 'Account Settings', 'General Settings', 'Security', 'Email Settings' (highlighted), 'Email Suppression', 'Email DKIM', 'Default Tags', and 'API'.

The main content area is titled 'ACCOUNT SETTINGS - EMAIL' and features a 'Save Changes' button. The settings are organized into sections:

- Default WebMail Signature:** Includes a search box for 'Show Default Signature Options'.
- HIPAA Certification Seats in WebMail:** A toggle switch is set to 'OFF' with the text 'Hide the LuxSci HIPAA-Certification Seal from end users'.
- Email Forwarding & Filtering:** A section titled 'Which users are permitted to configure user email forwarding & filtering settings?' contains a table:

Restriction Level	Normal Users	Domain Administrators	Account Administrators
<input checked="" type="checkbox"/> ON	✓	✓	✓
<input type="checkbox"/> OFF	✗	✓	✓
<input type="checkbox"/> OFF	✗	✗	✓

- Bounce Processing:** A toggle switch is set to 'ON' with the text 'Enable bounce processing of all email sent by all users. [More details](#)'.
- Open Tracking:** A toggle switch is set to 'ON' with the text 'Enable email open tracking for all HTML email messages sent (via SMTP, WebMail, and API) from this account. [More details](#)'.
- URL Click Tracking:** A toggle switch is set to 'ON' with the text 'Enable URL click tracking for all HTML email messages sent (via SMTP, WebMail, and API) from this account. [More details](#)'.

5.14.4 Enable SMTP Header Tracking

24. In a web browser, navigate to <https://luxsci.com/perl/member/members.pl>.
25. Log into your account as an account administrator.
26. Navigate to "Account Administration".
27. Open "Account Settings > Email Settings".
28. In the SMTP Header Tracking setting, set the following values:
 - a. Header 1: chid
 - b. Header 2: leave blank
 - c. Header 3: leave blank

Note: be sure to update both columns with the same value. This will tag the outbound sends with the channelexecutionid_offertemplateinstanceid value and allow the event data to be tracked back to a specific send.

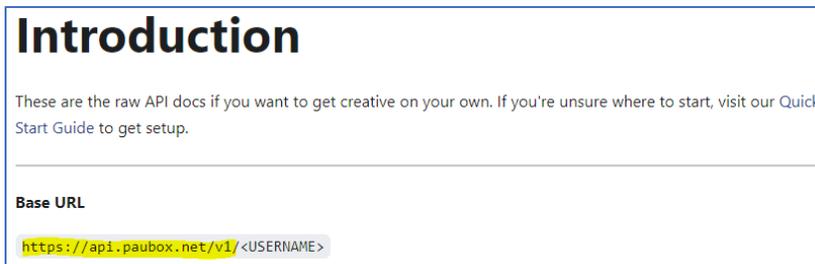
SMTP Header Tracking		
Track the contents of up to three specific email headers from sent email messages for the purposes of fine-grained email reporting and tracking.		
Header 1	<input type="text" value="chid"/>	<input type="text" value="chid"/>
Header 2	<input type="text" value="Header Name"/>	<input type="text" value="User-Friendly Name"/>
Header 3	<input type="text" value="Header Name"/>	<input type="text" value="User-Friendly Name"/>

NOTE: Starting with RPI v6.6, header values can be configured within the LuxSci channel. The values configured in the channel *must match* the values configured in the SMTP Header Tracking section.

5.15 Paubox Account Configuration

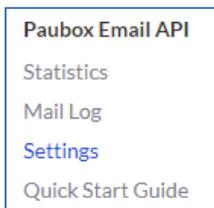
5.15.1 Retrieve the Host URL

1. On your web browser, navigate to https://docs.paubox.com/docs/paubox_email_api/introduction/
2. Under Base URL section, copy the shown URL, eg <https://api.paubox.net/v1>. This URL will be used to configure the Host in the Paubox channel configuration within RPI.

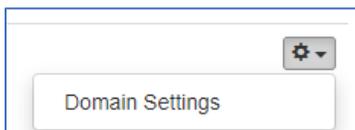


5.15.2 Retrieve API Username and API Key

1. On your web browser and navigate to <https://www.paubox.com/> and login into your account.
2. Under "Paubox Email API" click on the "Settings" link:



3. The Settings page will display the verified domains and corresponding Endpoint Username. On the right side of your configured domain, click Domain Settings setup icon:



4. Under "API Keys" section, the existing keys will display with only an API Key prefix. Click "New API Key" to generate a new API Key to copy and use within the Paubox channel configuration.

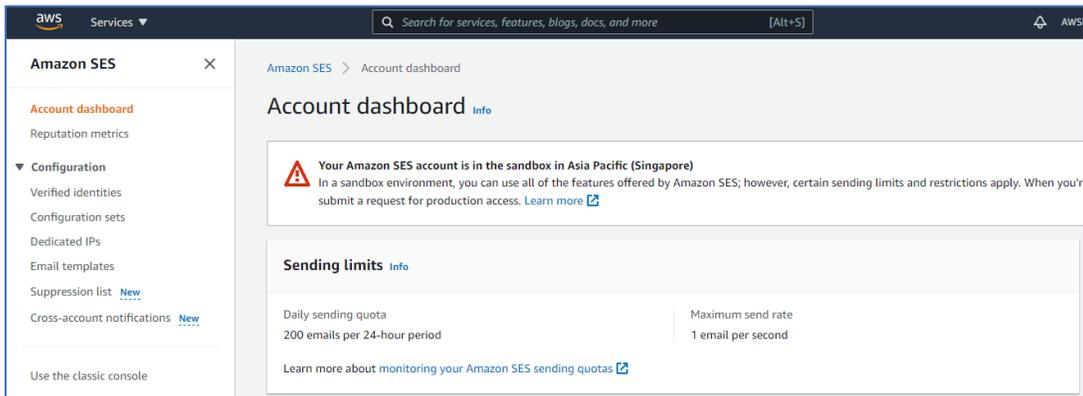
5.16 Amazon Simple Email Service (SES) Account Configuration

This section describes on how to configure Amazon SES and assumes the AWS access keys have been obtained, which include the access key ID and secret key.

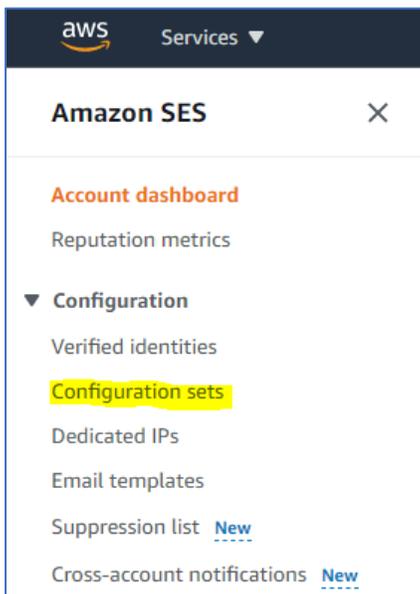
5.16.1 How to set up configuration set

Amazon SES configuration set allows event publishing to track email activities

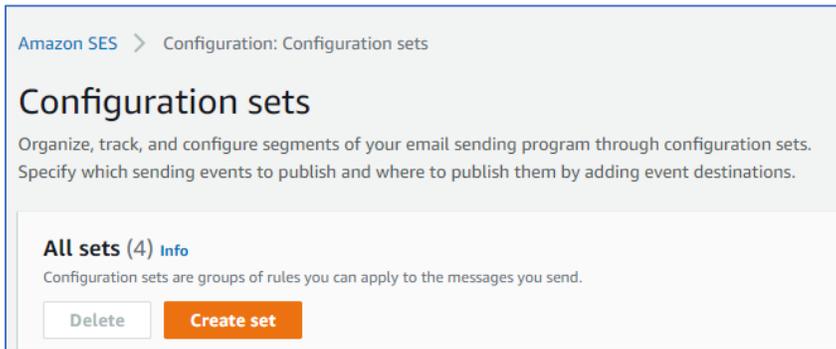
1. On your web browser, login to AWS console service portal <https://console.aws.amazon.com/>
2. Navigate to Amazon Simple Email Service:



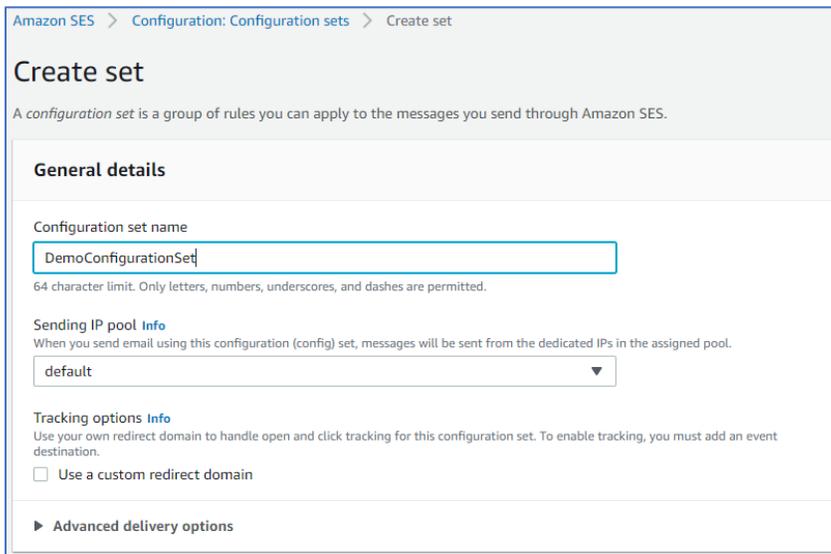
3. Click Configuration > Configuration sets in left navigation bar:



4. Click the “Create set” button to enter the configuration:



5. Enter the Configuration set name and click the “Create set” button:



- Once redirected to the created configuration set, click on the “Event destinations” tab:

The screenshot shows the Amazon SES console interface for a configuration set named "DemoConfigurationSet". The breadcrumb navigation at the top reads "Amazon SES > Configuration: Configuration sets > DemoConfigurationSet". The main heading is "DemoConfigurationSet" with "Delete" and "Disable sending" buttons to its right. Below the heading are two tabs: "Overview" and "Event destinations", with "Event destinations" being the active tab. A "General details" section is visible, containing an "Edit" button and a table of configuration details:

Sending status	Sending IP pool	Custom redirect domain
Enabled	default	-
Configuration set name	Transport Layer Security (TLS)	
DemoConfigurationSet	Optional	

- Click Add destination:

The screenshot shows the Amazon SES console interface for the same configuration set "DemoConfigurationSet". The breadcrumb navigation is "Amazon SES > Configuration: Configuration sets > DemoConfigurationSet". The main heading is "DemoConfigurationSet" with "Delete" and "Disable sending" buttons. The "Event destinations" tab is active. Below the heading is an "All destinations (0)" section with a "Delete" button and an orange "Add destination" button. A search bar labeled "Search all destinations" is present. Below the search bar is a table header with columns: "Name", "Destination", "Event types", and "Event publishing". The table body is empty, displaying the message "No destinations" and "No destinations to display for this configuration set." with an "Add destination" button at the bottom.

8. Select the following event types and click Next:

Select event types

Email sending events are metrics relating to your sending activity that you can measure using Amazon SES. Choose which types of sending events you'd like Amazon SES to publish to your event destination.

Event types Deselect all

Sending and delivery

- Sends**
The call was successful and Amazon SES will attempt to deliver the message to the recipient's mail server.
- Rendering failures**
The message wasn't sent because of a template rendering issue.
- Rejects**
Amazon SES accepted the message, but determined that it contained a virus and didn't attempt to deliver it to the recipient's mail server.
- Deliveries**
Amazon SES successfully delivered the message to the recipient's mail server.
- Hard bounces**
The recipient's mail server permanently rejected the message.
- Complaints**
The message was successfully delivered to the recipient's mail server, but the recipient marked it as spam.
- Delivery delays**
The message couldn't be delivered to the recipient's mail server because a temporary issue occurred.
- Subscriptions**
The email was successfully delivered to the recipient. The recipient updated the subscription preferences by clicking List-Unsubscribe header or via the Unsubscribe webpage linked to the email footer.

Open and click tracking [Info](#)
Measure subscriber engagement by tracking open and click events for messages sent using this configuration set.

- Opens**
- Clicks**

Tracking options
To use a custom redirect domain, you must edit your tracking options at the configuration set level.

Cancel Next

9. Select the “Amazon SNS” destination type and enter an event destination name and then click the “Create SNS topic” button:

Specify destination

An event destination is an AWS service to which email sending events can be published. Choosing the appropriate destination depends on the level of detail you want to capture and how you want to receive the data.

Destination options

Destination type [Info](#)

Amazon CloudWatch Amazon Kinesis Data Firehose Amazon Pinpoint Amazon SNS

Name

Name can include letters (A-Z), numbers (0-9), dashes (-), and hyphens (—). No spaces.

Event publishing
Amazon SES will publish the selected events to this event destination.
 Enabled

Amazon Simple Notification Service (SNS) topic Create SNS topic
In Amazon SNS, a topic is a logical access point that acts as a communication channel.

SNS topic
Amazon SES will notify the selected topic when a message produces any of the chosen event types.

Cancel Previous Next

10. Enter Topic name and click “Create topic” button:

Create SNS topic ✕

The topic name you specify will be used to create Amazon Resource Name (ARN), a unique identifier for your Amazon SNS topic.

Topic name

256 character limit. Only letters, numbers, underscores, and dashes are permitted.

Display name - *optional*

A display name is required if you intend to receive notifications through SMS.

100 character limit.

Cancel Create topic

11. Select the newly created AWS SNS topic and click the “Next” button:

Specify destination

An event destination is an AWS service to which email sending events can be published. Choosing the appropriate destination depends on the level of detail you want to capture and how you want to receive the data.

Destination options

Destination type [Info](#)

Amazon CloudWatch Amazon Kinesis Data Firehose Amazon Pinpoint Amazon SNS

Name

Name can include letters (A-Z), numbers (0-9), dashes (-), and hyphens (—). No spaces.

Event publishing

Amazon SES will publish the selected events to this event destination.

Enabled

Amazon Simple Notification Service (SNS) topic Create SNS topic

In Amazon SNS, a topic is a logical access point that acts as a communication channel.

SNS topic

Amazon SES will notify the selected topic when a message produces any of the chosen event types.

 ▼

Cancel Previous Next

12. Review your event destination and click the “Add destination” button:

Review

Step 1: Select event types Edit

Event types

Sending and delivery
Sends, Rendering failures, Rejects, Deliveries, Hard bounces, Complaints, Delivery delays, Subscriptions, Opens, Clicks

Step 2: Specify event destination Edit

Destination options

Destination type
Amazon SNS

Name
DemoEventDestination

Event publishing
Enabled

Amazon Simple Notification Service (SNS) topic

SNS topic
DemoTopicName

Cancel Previous Add destination

13. When redirected to the newly created event destination, hover over Destination Type and click on the “Amazon SNS” link:

Amazon SES > Configuration: Configuration sets > DemoConfigurationSet > DemoEventDestination

DemoEventDestination

Delete Disable

Summary for DemoEventDestination

Name DemoEventDestination	Destination type Amazon SNS	Event publishing Enabled
------------------------------	--	-----------------------------

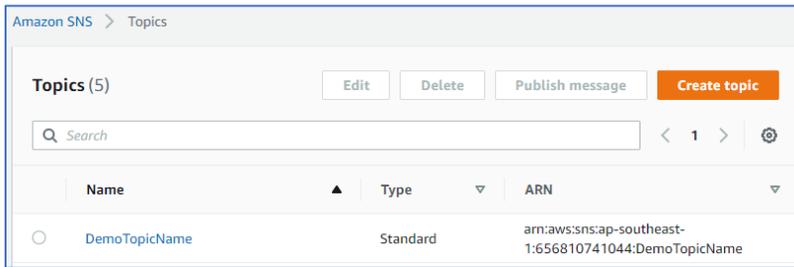
Event types Edit

Event types
Hard bounces, Clicks, Complaints, Deliveries, Delivery delays, Opens, Rejects, Rendering failures, Sends, Subscriptions

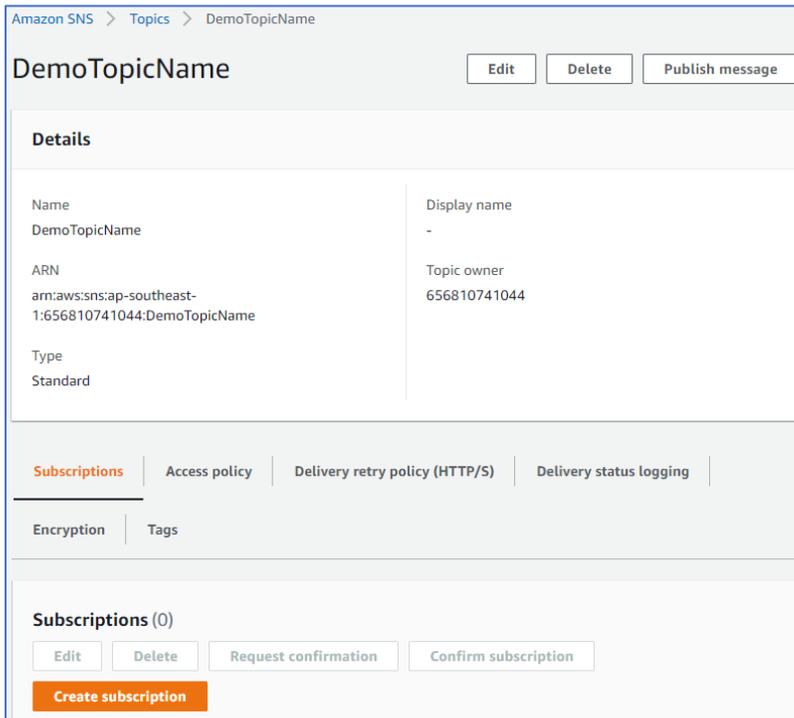
Amazon Simple Notification Service (SNS) topic Edit

SNS topic
DemoTopicName

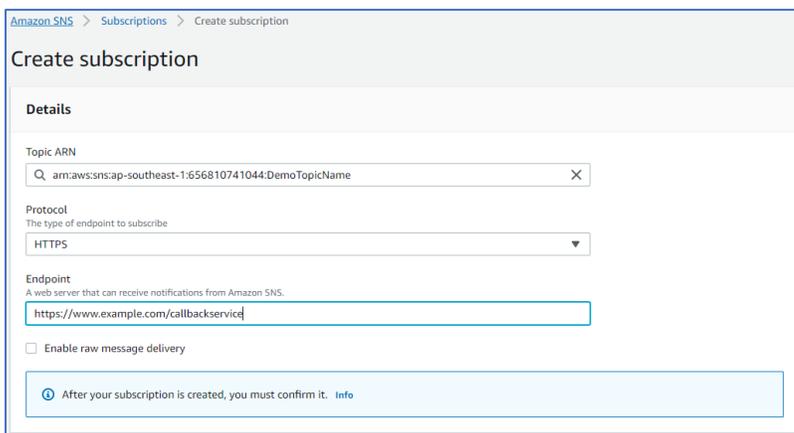
14. Click on the newly created topic name:



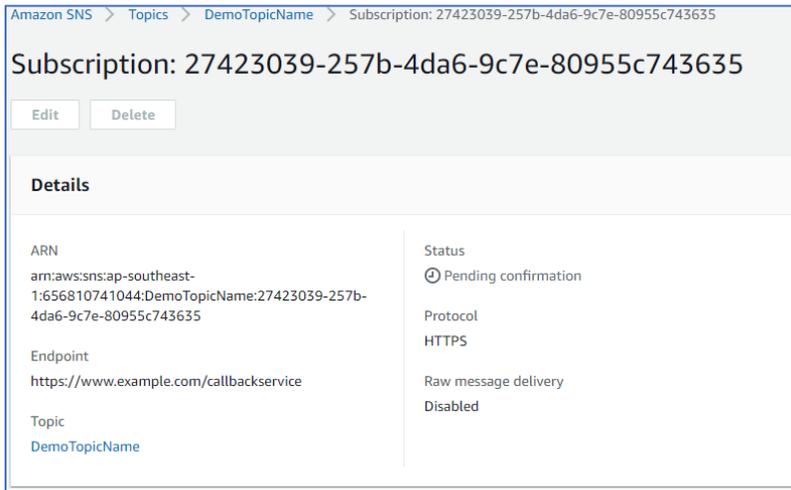
15. In the Subscriptions panel, click the “Create subscription” button:



16. Select HTTPS as the protocol and enter the endpoint to the Amazon SES Callback Service server:



- Click the “Create Subscription” button, which will redirect the page to the Subscriptions screen. The status for that subscription will show as “Pending confirmation”. This subscription will need to be confirmed before AWS will begin posting the event.



- To confirm the subscription, open a separate browser tab and navigate to AWS SES callback service configured for this instance, formatted as: `http://<server name>/status/<RPI Client ID>`. Under the “EmailMetricsLocationStatus” section, copy the “AWS Subscribe URL” to another browser tab, which will confirm the subscription for the AWS SNS Topic event publishing.

5.16.2 Amazon SES Performance Limitations

During outbound fulfillment, the number of recipients sent per request will depend on the offer purpose type:

Email Offer Purpose Type	Recipients per Batch	Number Of API Calls	API Call Completion Time
Marketing	1	1	350 milliseconds
Operational	50	1	350 milliseconds

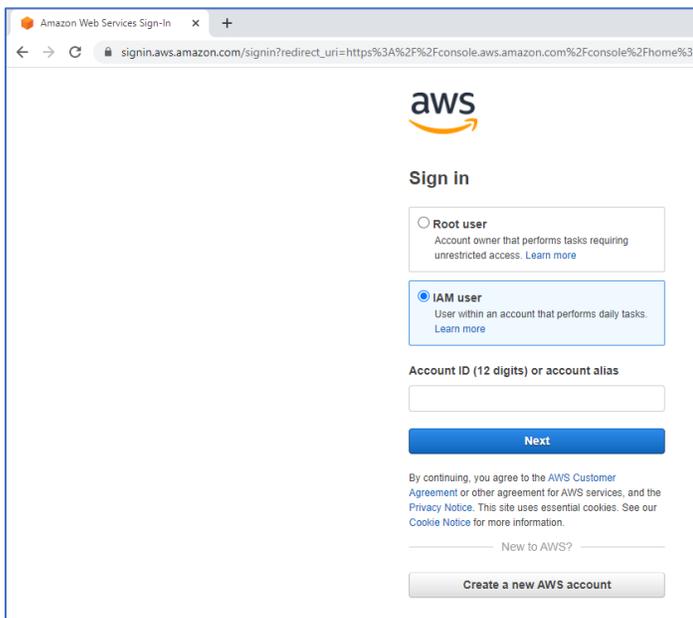
6 SMS Provider Configuration

6.1 Amazon Pinpoint SMS Configuration

This section describes how to create and configure Amazon Pinpoint SMS project in Amazon Web Services (AWS). Assuming you have already an Amazon Web Services account, please follow the steps below.

6.1.1 Creating new Amazon Pinpoint SMS project

1. Log into to your Amazon Web Services management console by navigating to <https://console.aws.amazon.com/iam/>
2. Select IAM User option and provide your Account ID or account alias. Click Next.



Amazon Web Services Sign-In

sign-in.aws.amazon.com/signin?redirect_uri=https%3A%2Fconsole.aws.amazon.com%2Fconsole%2Fhome%3F

aws

Sign in

Root user
Account owner that performs tasks requiring unrestricted access. [Learn more](#)

IAM user
User within an account that performs daily tasks. [Learn more](#)

Account ID (12 digits) or account alias

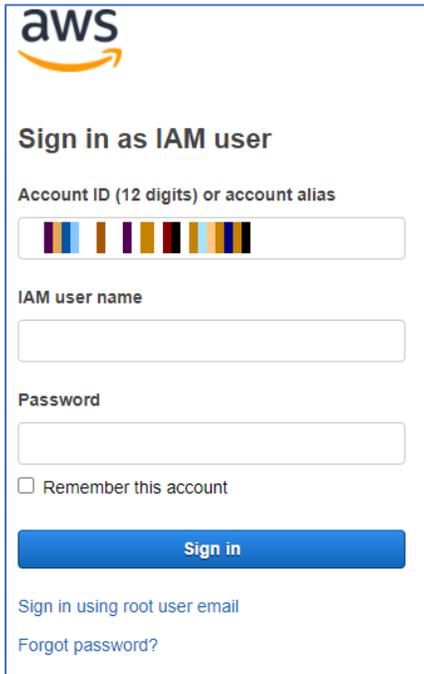
Next

By continuing, you agree to the [AWS Customer Agreement](#) or other agreement for AWS services, and the [Privacy Notice](#). This site uses essential cookies. See our [Cookie Notice](#) for more information.

New to AWS?

Create a new AWS account

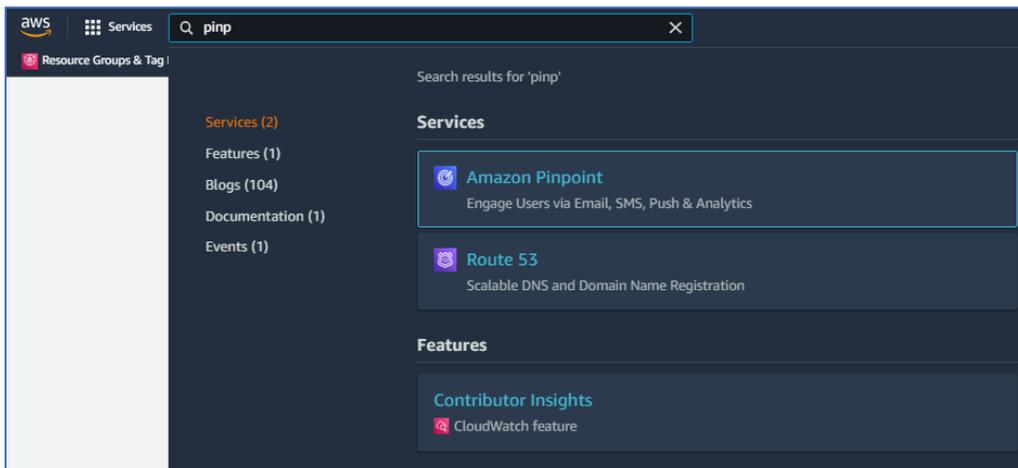
3. Provide your IAM username and password. Click Sign in.



The image shows the AWS 'Sign in as IAM user' form. At the top left is the AWS logo. Below it is the title 'Sign in as IAM user'. The form contains the following fields and elements:

- Account ID (12 digits) or account alias:** A text input field with a colorful bar icon.
- IAM user name:** A text input field.
- Password:** A text input field.
- Remember this account
- Sign in:** A blue button.
- [Sign in using root user email](#)
- [Forgot password?](#)

4. Once you have logged in successfully, you will be redirected to AWS management console. In the services search box, look for Amazon Pinpoint. Click Amazon Pinpoint.



5. If you are using an existing Amazon Pinpoint project, proceed to step #9.

- You will now be redirected to Amazon Pinpoint management console. To create new project, enter the project name and click **Create a project**.

Get started

To get started with Amazon Pinpoint, create a project.

Project name

Create a project

- In the Configure features page, configure SMS. Click **Configure** button.

Configure features

Choose a feature to add to your project. You can add more features later.

Project features

Messaging channels and response metrics

Email
Send personalized email messages to your customers. [Info](#)
Configure

SMS
Send SMS text messages from shared or reserved phone numbers. [Info](#)
Configure

Push notifications
Send push notifications to users of your mobile apps. [Info](#)
Configure

Application analytics

Mobile app analytics
Track usage metrics for mobile applications. [Info](#)
Configure

Web app analytics
Track usage metrics for web-based applications. [Info](#)
Configure

- Select *Enable the SMS channel for this project* option. You may leave other settings as it is. Click **Save changes**.

Pinpoint > All projects > tets > Configure features > Set up SMS

Set up SMS

General settings

Enable the SMS channel for this project

Account-level settings

The settings in this section apply to all SMS messages that you send from your AWS account, including messages that you send using other AWS services.

Default message type
The type of messages you plan to send from this project. [Info](#)

Transactional
Time-sensitive content, such as one-time passcodes.

Promotional
Non-critical content, such as marketing messages.

Account spending limit
The maximum amount of money, in USD, that you want to spend sending SMS messages each month. The limit for accounts in the sandbox is 1 (\$1.00). [Info](#)

20

The spend limit that you specify can't include decimals. The minimum value is 0, and the maximum value is 20.

(Optional) Account sender ID
The identity that appears on recipients' devices when they receive this message. Support varies by country or region. [Info](#)

Enter a valid sender ID

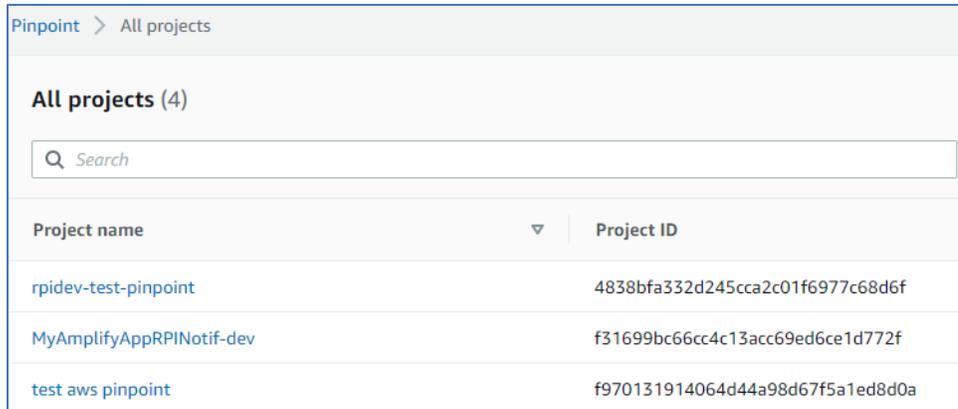
Your sender ID can contain up to 11 alphanumeric or hyphen (-) characters. It has to contain at least one letter, and it can't consist only of numbers. It has to start and end with with an alphanumeric character. Some countries and regions may have additional restrictions.

Advanced configurations - optional

Cancel **Save changes**

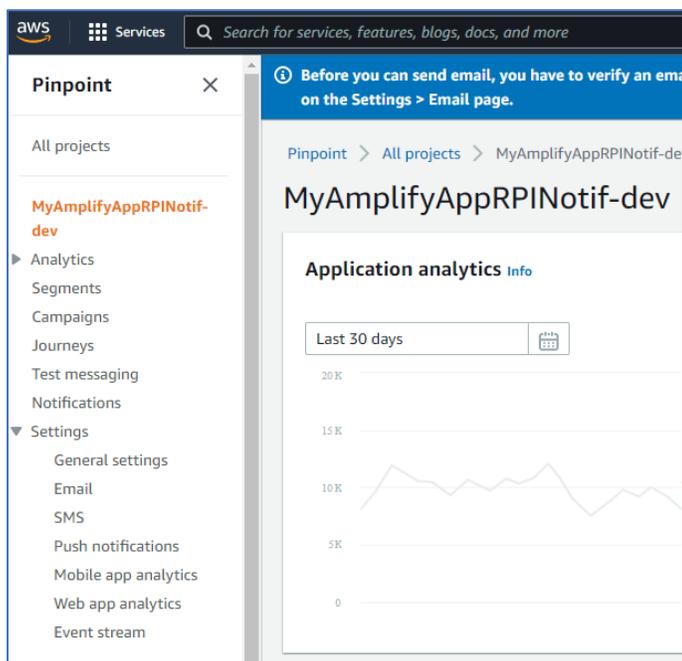
6.1.2 Enabling Amazon Pinpoint SMS on existing project

1. To enable Amazon Pinpoint SMS on existing Pinpoint project, select your Pinpoint project from the **All projects** list, as shown in the image below.



Project name	Project ID
rpidev-test-pinpoint	4838bfa332d245cca2c01f6977c68d6f
MyAmplifyAppRPINotif-dev	f31699bc66cc4c13acc69ed6ce1d772f
test aws pinpoint	f970131914064d44a98d67f5a1ed8d0a

2. Expand Settings menu from the left pane and click SMS.



3. In the Edit SMS general settings, select Enable the SMS channel for this project option. You may leave other settings as it is. Click **Save changes**.

Edit SMS

General settings

Enable the SMS channel for this project

▼ **Account-level settings**

The settings in this section apply to all SMS messages that you send from your AWS account, including messages that you send using other AWS services.

Default message type
The type of messages you plan to send from this project. [Info](#)

Transactional
Time-sensitive content, such as one-time passcodes.

Promotional
Non-critical content, such as marketing messages.

Account spending limit
The maximum amount of money, in USD, that you want to spend sending SMS messages each month. The limit for accounts in the sandbox is 1 (\$1.00). [Info](#)

The spend limit that you specify can't include decimals. The minimum value is 0, and the maximum value is 20.

(Optional) Account sender ID
The identity that appears on recipients' devices when they receive this message. Support varies by country or region. [Info](#)

Your sender ID can contain up to 11 alphanumeric or hyphen (-) characters. It has to contain at least one letter, and it can't consist only of numbers. It has to start and end with an alphanumeric character. Some countries and regions may have additional restrictions.

[Cancel](#) [Save changes](#)

6.1.3 Create Pinpoint import Segment ARN role

Please navigate and follow the steps provided the links below.

https://docs.aws.amazon.com/IAM/latest/UserGuide/id_roles_create_for-service.html

<https://docs.aws.amazon.com/pinpoint/latest/developerguide/permissions-import-segment.html#permissions-import-segment-trustpolicy>

The Pinpoint Segment ARN role name will be used in Redpoint Interaction (RPI) Amazon Pinpoint Email connector. The role must have required permission to access the Amazon S3 bucket folder.

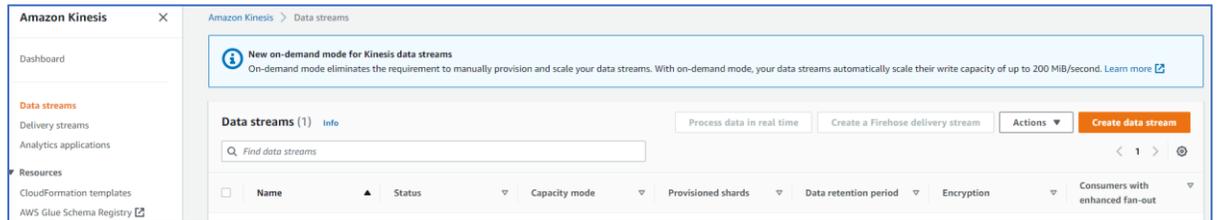
Segment role ARN:	<input type="text"/>	Amazon Resource Name (ARN) used to authorize Pinpoint to access Amazon S3 bucket folder
-------------------	----------------------	---

6.1.4 Configure Amazon Kinesis for Event Data Processing

This section describes how to create and configure Amazon Kinesis in Amazon Web Services (AWS). Kinesis will be used to capture an event data for Pinpoint SMS (and Pinpoint Email if applicable). Assuming you have already an Amazon Web Services account, please follow the steps below.

6.1.4.1 Provisioning a new Amazon Kinesis Data Streams

1. In Amazon Kinesis left pane menu, click **Data streams**.



2. Click Create data stream to create new data stream.
3. Enter the name of the data stream and select Provisioned option.

The screenshot displays the AWS console interface for creating a new data stream. The breadcrumb navigation shows 'Amazon Kinesis > Data streams > Create data stream'. The main heading is 'Create data stream' with an 'Info' link. The configuration is divided into two main sections: 'Data stream configuration' and 'Data stream capacity'.

Data stream configuration

Data stream name

Enter name

Acceptable characters are uppercase and lowercase letters, numbers, underscores, hyphens and periods.

Data stream capacity Info

Capacity mode

- On-demand**
Use this mode when your data stream's throughput requirements are unpredictable and variable. With on-demand mode, your data stream's capacity scales automatically.
- Provisioned**
Use provisioned mode when you can reliably estimate throughput requirements of your data stream. With provisioned mode, your data stream's capacity is fixed.

Provisioned shards

The total capacity of a stream is the sum of the capacities of its shards. Enter number of provisioned shards to see total data stream capacity.

1 **Shard estimator**

Minimum: 1, Maximum available: 199, Account quota limit: 200. [Request shard quota increase](#)

Total data stream capacity

Shard capacity is determined by the number of provisioned shards. Each shard ingests up to 1 MiB/second and 1,000 records/second and emits up to 2 MiB/second. If writes and reads exceed capacity, the application will receive throttles.

Write capacity	Read capacity
Maximum	Maximum
1 MiB/second and 1,000 records/second	2 MiB/second

4. Click **Create data stream**

The total capacity of a stream is the sum of the capacities of its shards. Enter number of provisioned shards to see total data stream capacity.

Shard estimator

Minimum: 1, Maximum available: 199, Account quota limit: 200. [Request shard quota increase](#)

Total data stream capacity
Shard capacity is determined by the number of provisioned shards. Each shard ingests up to 1 MiB/second and 1,000 records/second and emits up to 2 MiB/second. If writes and reads exceed capacity, the application will receive throttles.

Write capacity	Read capacity
Maximum 1 MiB/second and 1,000 records/second	Maximum 2 MiB/second

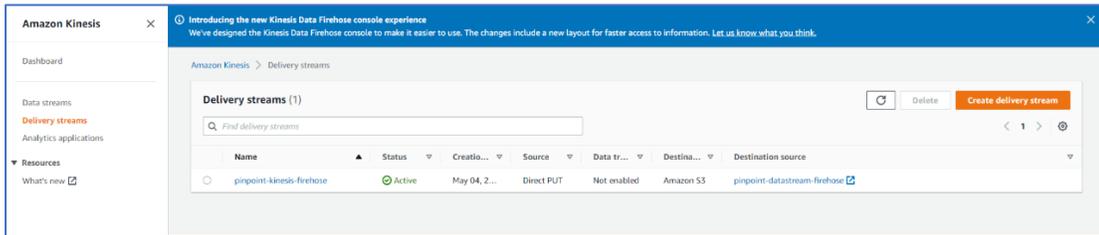
 Provisioned mode has a fixed-throughput pricing model. See [Kinesis pricing for Provisioned mode](#)

Data stream settings
You can edit the settings after the data stream has been created and is in the active status.

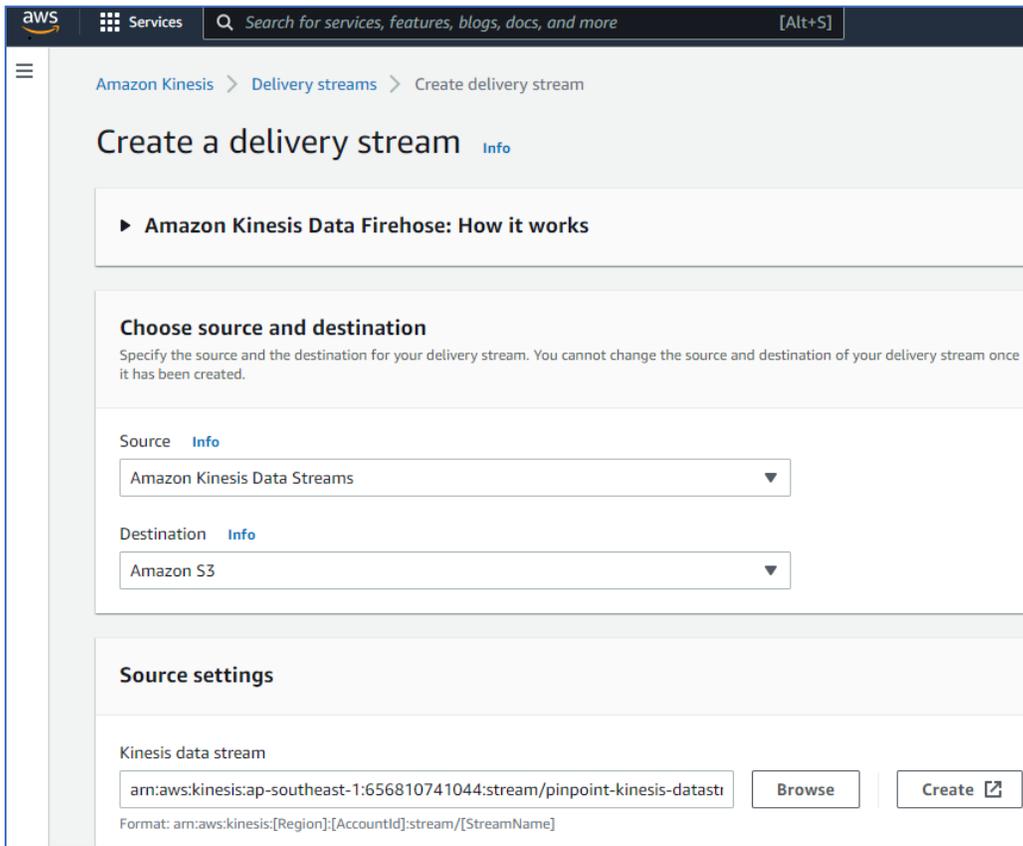
Setting	Value	Editable after creation
Capacity mode	Provisioned	 Yes
Provisioned shards	1	 Yes
Data retention period	1 day	 Yes
Server-side encryption	Disabled	 Yes
Monitoring enhanced metrics	Disabled	 Yes
Tags	-	 Yes

[Cancel](#) [Create data stream](#)

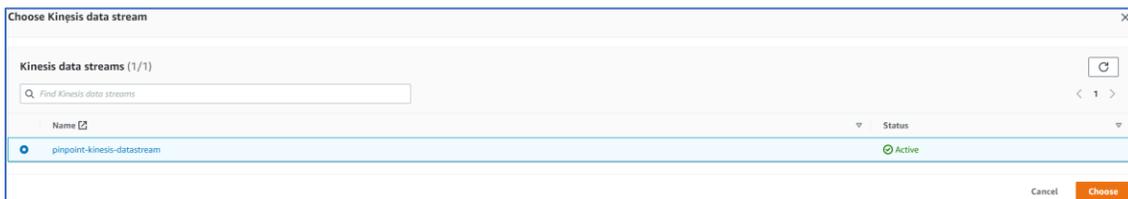
5. In Amazon Kinesis left pane menu, click Delivery streams.



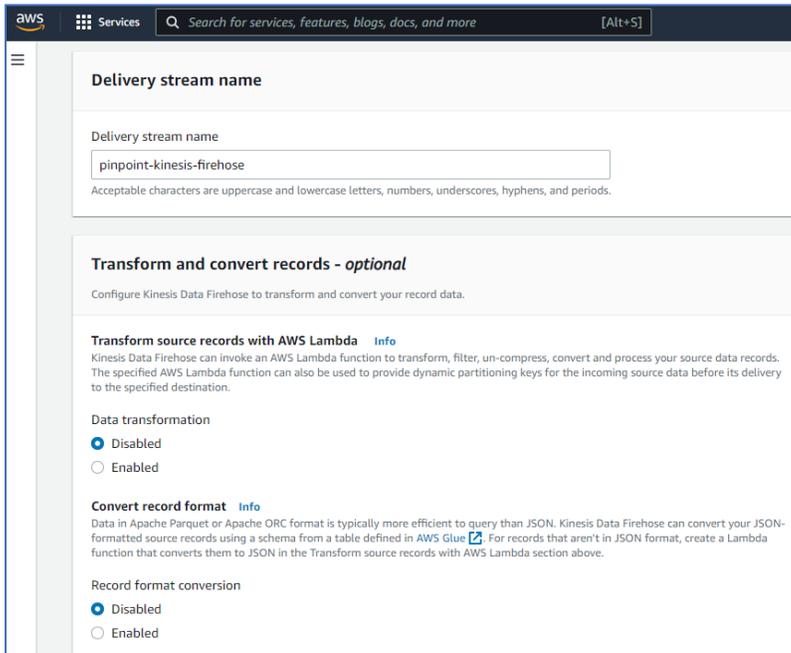
6. Click Create delivery stream to create new delivery stream.



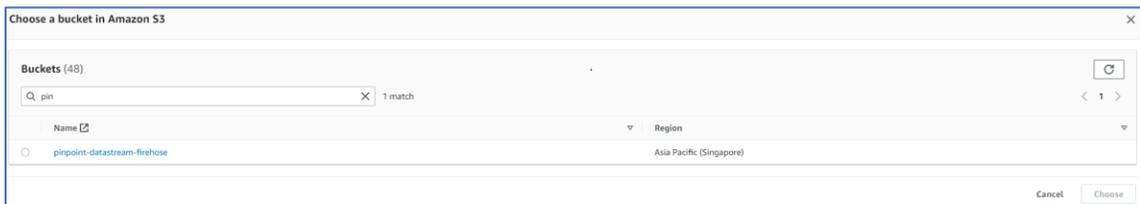
7. Choose Amazon Kinesis Data Streams as your source and choose Amazon S3 as your destination.
8. In the Source settings, browse and choose the data stream you have previously created.



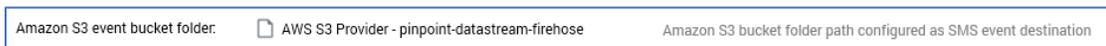
9. Enter the name of the delivery stream and leave other default options.



10. In the destination settings, choose an Amazon S3 bucket folder. You will need to create an S3 bucket if it does not exist. The event data will be written to the chosen bucket folder.



The bucket folder configured here will be used as Amazon S3 event bucket folder in Amazon Pinpoint Email channel plugin configured in Redpoint Interaction.



11. You may leave other default options. Click **Create** delivery stream.

The screenshot shows the AWS console interface for configuring destination settings. At the top, there's a search bar and a navigation menu. The main heading is "Destination settings" with an "Info" link. Below this, a sub-heading says "Specify the destination settings for your delivery stream." The "S3 bucket" section contains a text input field with the value "s3://pinpoint-datastream-firehose", a "Browse" button, and a "Create" button with an external link icon. A note below the input field states "Format: s3://bucket". The "Dynamic partitioning" section has a description and two radio buttons: "Disabled" (selected) and "Enabled". The "S3 bucket prefix - optional" section includes a description and a text input field with the placeholder "Enter a prefix" and a green circular icon. A note below it says "You can repeat the same keys in your S3 bucket prefix. Maximum S3 bucket prefix characters: 1024." The "S3 bucket error output prefix - optional" section also has a description and a text input field with the placeholder "Enter a prefix". At the bottom, there are two expandable sections: "Buffer hints, compression and encryption" and "Advanced settings". The "Advanced settings" section is expanded, showing "Server-side encryption disabled; error logging enabled; IAM role KinesisFirehoseServiceRole-pinpoint-ap-southeast-1-1658400414244; no tags." At the very bottom, there are "Cancel" and "Create delivery stream" buttons.

Destination settings [Info](#)

Specify the destination settings for your delivery stream.

S3 bucket

s3://pinpoint-datastream-firehose

Format: s3://bucket

Dynamic partitioning [Info](#)

Dynamic partitioning enables you to create targeted data sets by partitioning streaming S3 data based on partitioning keys. You can partition your source data with inline parsing and/or the specified AWS Lambda function. You can enable dynamic partitioning only when you create a new delivery stream. You cannot enable dynamic partitioning for an existing delivery stream. Enabling dynamic partitioning incurs additional costs per GiB of partitioned data. For more information, see [Kinesis Data Firehose pricing](#).

Disabled
 Enabled

S3 bucket prefix - optional

By default, Kinesis Data Firehose appends the prefix "YYYY/MM/dd/HH" (in UTC) to the data it delivers to Amazon S3. You can override this default by specifying a custom prefix that includes expressions that are evaluated at runtime.

Enter a prefix

You can repeat the same keys in your S3 bucket prefix. Maximum S3 bucket prefix characters: 1024.

S3 bucket error output prefix - optional

You can specify an S3 bucket error output prefix to be used in error conditions. This prefix can include expressions for Kinesis Data Firehose to evaluate at runtime.

Enter a prefix

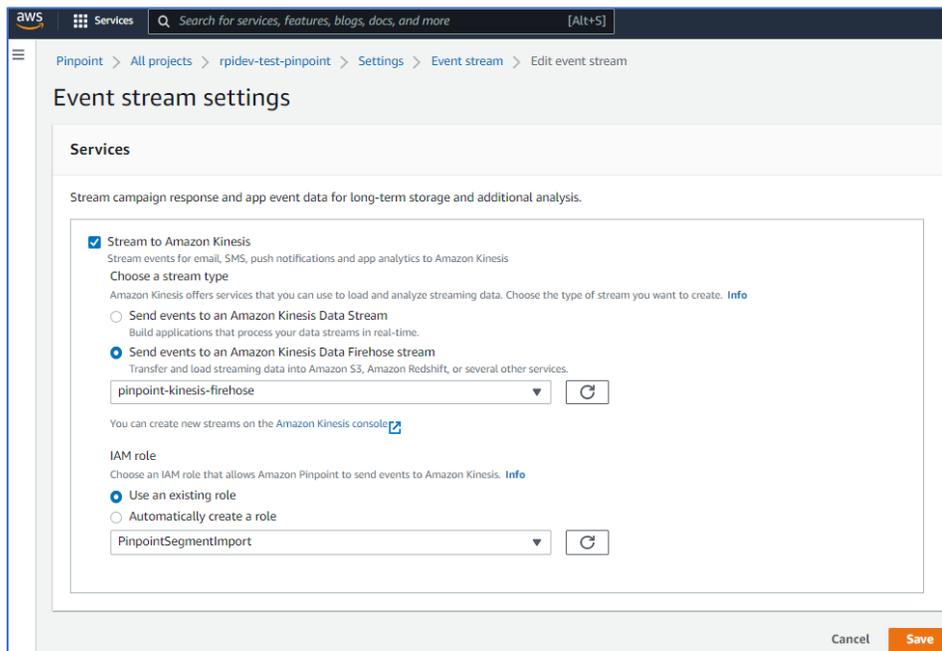
► **Buffer hints, compression and encryption**

The fields below are pre-populated with the recommended default values for S3. Pricing may vary depending on storage and request costs.

► **Advanced settings**

Server-side encryption disabled; error logging enabled; IAM role KinesisFirehoseServiceRole-pinpoint-ap-southeast-1-1658400414244; no tags.

12. In the Settings menu of your Pinpoint Email project, click **Event stream**.



13. In the Event stream settings, select **Stream to Amazon Kinesis** option.

14. Choose *Send events to an Amazon Kinesis Data Firehose stream* option and select your previously created data stream

15. Finally, you can use existing or create new IAM role for the event stream.

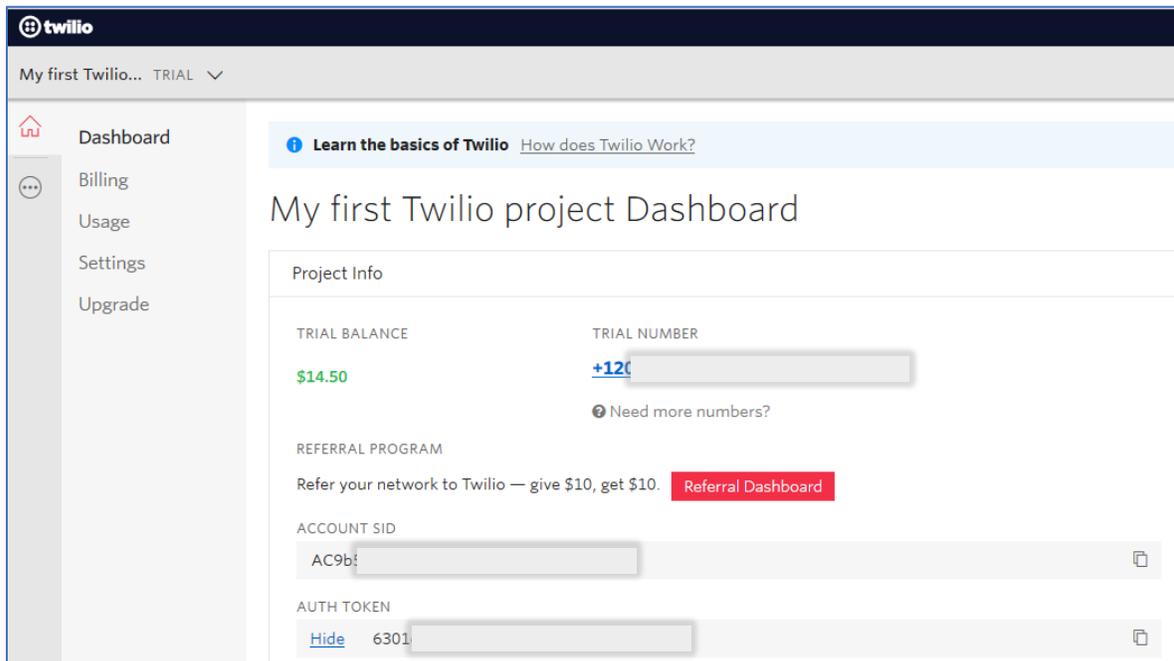
6.2 Twilio Account Configuration

This section describes how to get a Twilio account SID, authorization token and number.

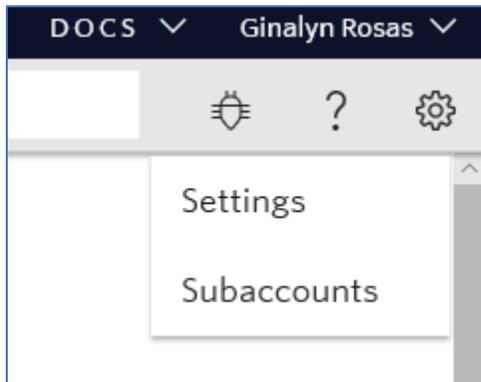
6.2.1 Getting an Account SID and Authorization Token

An account SID and an authorization token are both required when integrating Twilio with RPI. Please follow these steps to obtain them.

1. Sign up for a Twilio account and log in at <https://www.twilio.com>.
2. Once your account has been verified and has a phone number, click Dashboard. The Account SID is already displayed.
3. Click 'Show' under the 'Auth Token' to show the authorization token



4. The account SID and authorization token can also be retrieved by going to the Account Settings page.



5. Your live API credentials will be shown as displayed. Click the Lock button to show the authorization token.

Add an extra layer of protection to Twilio accounts.
 Once you enable 2FA, all users accessing this account must enter verification codes sent on the channel they prefer.
 To enable 2FA for yourself, go to [User Settings](#).

DISABLED Do not require a verification code
 ONCE PER COMPUTER Trust computers and only ask for verification code every 30 days
 EVERY LOG-IN We'll always ask for a verification code

API Credentials

LIVE Credentials [Learn about REST API Credentials](#)

ACCOUNT SID
 AC9b1
 Used to exercise the REST API

AUTH_TOKEN
 6:
[Request a Secondary Token](#)

Keep this somewhere safe and secure

TEST Credentials

TEST ACCOUNT SID
 AC41
 Used to exercise the REST API

TEST AUTH_TOKEN
 a
 Keep this somewhere safe and secure

6. You can also view the credentials of the subaccounts by going to the Subaccounts page

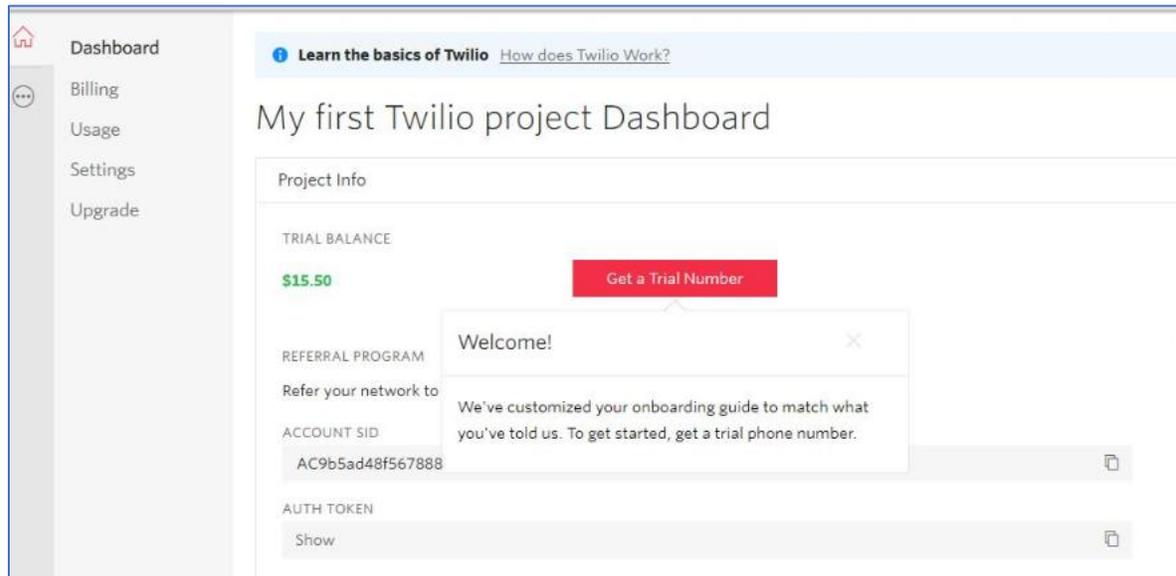
The screenshot shows the Twilio 'Subaccounts' page. It includes a sidebar with navigation options like Dashboard, Billing, Usage, Settings, and Subaccounts. The main content area has a title 'Subaccounts' and a description. Below the description is a table with the following data:

ACCOUNT NAME	SID	STATUS
MI_SubAccount1_QA	ACSa9	Active

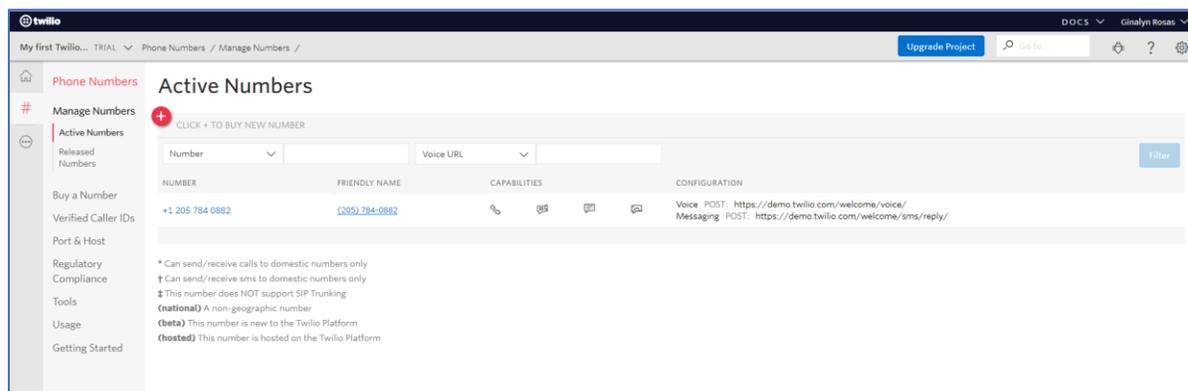
6.2.2 Getting a Twilio number

Follow these steps to obtain a Twilio number.

1. Sign up for a Twilio account and log in. <https://www.twilio.com>.
2. Initially, your account will be associated with an existing phone number. You can choose to release your initial number and buy a new one if you upgrade your account.



3. View your numbers in the Manage Numbers page.



4. Buy additional numbers for your account by going to the Dashboard and hovering over 'Need more numbers?'

twilio

My first Twilio... TRIAL Phone Numbers /

Phone Numbers

Buy a Number

COUNTRY Philippines (+63)

Not finding the number? We can often get the number for you

NUMBER Search by digits or phrases (Optional) MATCH TO First part of number

Search by area code, prefix, or characters you want in your phone number.

CAPABILITIES ANY Voice Fax SMS MMS

Different numbers have different communications capabilities. Select the ones your phone number needs.

Search Show Advanced Search

Manage Numbers

Verified Caller IDs

Port & Host

Regulatory Compliance

Tools

Usage

Getting Started

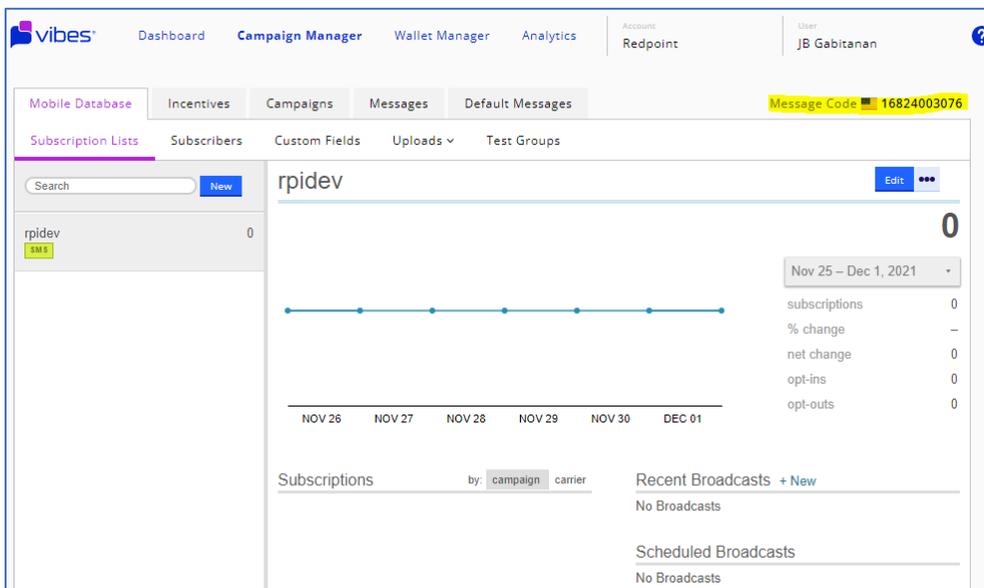
6.3 Vibes Account Configuration

6.3.1 Vibes Configuration

This section assumes that a Vibes account has already been provided with a username and password, and that a short code or long code have been provisioned to send SMS messages within RPI.

6.3.1.1 Acquiring the message code

1. Open a web browser and login to the Vibes portal: <https://cm.vibescm.com/app>
2. Navigate to Campaign Manager
3. Copy the message code located on the top right corner of the portal and paste it to the “Message Code” textbox within the Vibes channel configuration in RPI:



6.3.2 Vibes Performance Limitations

The Vibes API can only support up to 100 SMS subscribers per API call. Each send API request will take approximately 10 milliseconds to complete. For example, if the audience is targeting 1000 SMS recipients, the offer fulfillment step will make 10 total requests, for a total of approximately 100 milliseconds to complete the send.

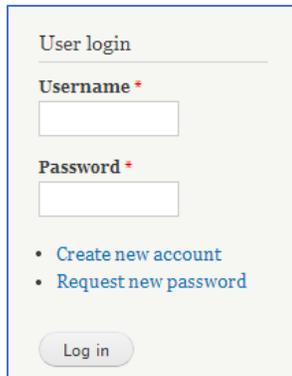
7 External Content Provider Configuration

7.1 Drupal

This section shows how to configure Drupal CMS v7.x for Redpoint Interaction to support the Drupal External Content Provider (ECP) plugin.

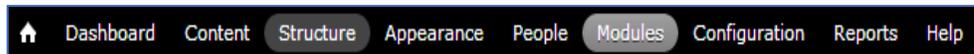
7.1.1 Service Module Installation

1. In a web browser, log into the Drupal content management system.

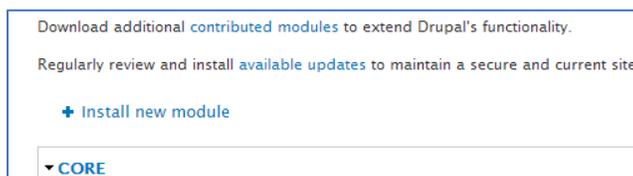


A screenshot of the Drupal user login form. It features a title "User login" above a horizontal line. Below the line are two input fields: "Username *" and "Password *". Underneath the password field are two links: "Create new account" and "Request new password". At the bottom of the form is a "Log in" button.

2. At the toolbar, click **Modules**.

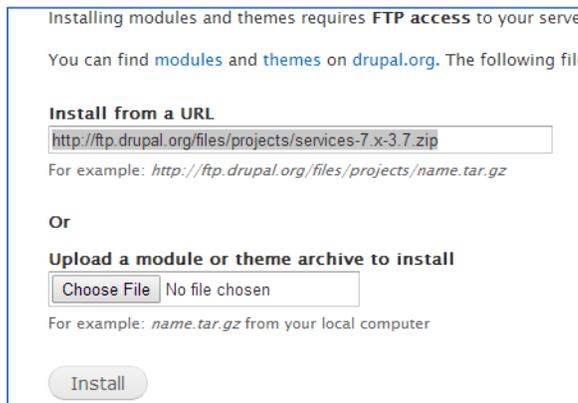


3. Scroll down and locate the **Services** module (if currently installed; if not, please continue to the next step).
4. In the Modules page, click Install new module.



A screenshot of the "Install new module" form in Drupal. It contains the following text: "Download additional [contributed modules](#) to extend Drupal's functionality." and "Regularly review and install [available updates](#) to maintain a secure and current site." Below this text is a blue link "+ Install new module". At the bottom of the form is a dropdown menu with "CORE" selected.

- In the **Install from URL** textbox, enter the following ftp URL: <http://ftp.drupal.org/files/projects/services-7.x-3.7.zip>
Click **Install**:



Installing modules and themes requires **FTP access** to your server.

You can find [modules](#) and [themes](#) on [drupal.org](#). The following files are available:

Install from a URL

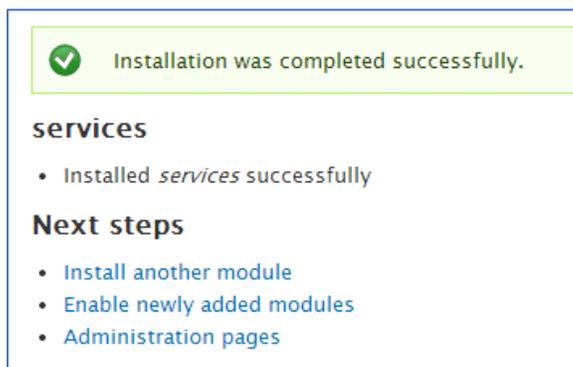
For example: `http://ftp.drupal.org/files/projects/name.tar.gz`

Or

Upload a module or theme archive to install

For example: `name.tar.gz` from your local computer

- Verify that the installation completes successfully.



 Installation was completed successfully.

services

- Installed *services* successfully

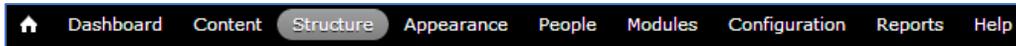
Next steps

- [Install another module](#)
- [Enable newly added modules](#)
- [Administration pages](#)

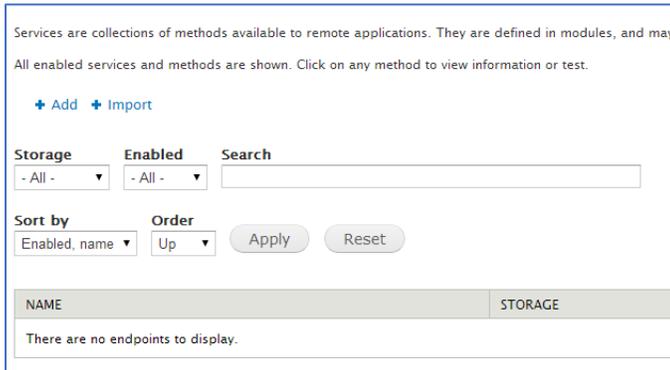
- Click **Enable newly added modules** to be redirected to the Modules page.
- Install the following modules by following the same procedure as documented in steps 4 to7:
 - Ctools – <http://ftp.drupal.org/files/projects/ctools-7.x-1.4.zip>
 - OAuth – <http://ftp.drupal.org/files/projects/oauth-7.x-3.2.zip>
 - Libraries – <http://ftp.drupal.org/files/projects/libraries-7.x-2.2.zip>
- Once you have successfully installed the aforementioned modules, double check the following items to see if their status is enabled:
 - Services
 - OAuth Authentication
 - REST Server
 - Chaos tools
 - OAuth
 - Libraries
- Click **Save configuration**.

7.1.2 Creating a Service Endpoint

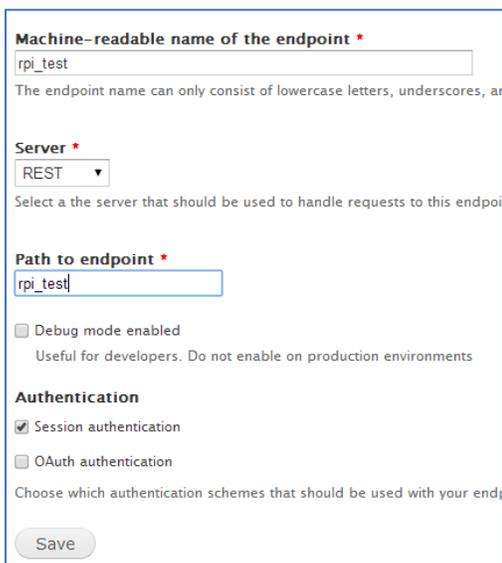
1. At the toolbar, click **Structure> Services**.



2. On the Manage Services page, click **Add** to add a new service endpoint.

A screenshot of the 'Manage Services' page in Drupal. At the top, there is a text block explaining that services are collections of methods for remote applications. Below this, there are two buttons: '+ Add' and '+ Import'. There are also filters for 'Storage' and 'Enabled', both set to '- All -', and a search box. Below the filters, there are 'Sort by' and 'Order' dropdowns, with 'Apply' and 'Reset' buttons. At the bottom, there is a table with columns 'NAME' and 'STORAGE'. The table is empty, with the message 'There are no endpoints to display.' below it.

3. Click **Add** to add new service endpoint.
4. In the **Machine-readable name** textbox, enter *rpi_test*.
5. Select **Server** option REST.
6. Enter *rpi_test* for the **Path**. This serves as the Service name in the RPI Drupal ECP plugin.
7. Select **Session authentication**.
8. Click **Save**.

A screenshot of the 'Add Service Endpoint' form. The 'Machine-readable name of the endpoint' field contains 'rpi_test'. The 'Server' dropdown is set to 'REST'. The 'Path to endpoint' field contains 'rpi_test'. There is a checkbox for 'Debug mode enabled' which is unchecked. Under the 'Authentication' section, the 'Session authentication' checkbox is checked, and the 'OAuth authentication' checkbox is unchecked. A 'Save' button is at the bottom.

9. On the Services page, the newly added Service endpoint named *rpi_test* will be displayed.

NAME	STORAGE	OPERATIONS
rpi_test	Normal	Edit Resources ▼

10. Click **Edit Resources**.
11. Select the **file** and **user** resources.
12. Click **Save**.

<input type="checkbox"/>	RESOURCE
<input type="checkbox"/>	▶ comment
<input checked="" type="checkbox"/>	▶ file
<input type="checkbox"/>	▶ node
<input type="checkbox"/>	▶ system
<input type="checkbox"/>	▶ taxonomy_term
<input type="checkbox"/>	▶ taxonomy_vocabulary
<input checked="" type="checkbox"/>	▶ user

13. On the Service tab, click **Server**.

My account Log out				
<input type="button" value="EDIT"/>	<input checked="" type="button" value="SERVER"/>	<input type="button" value="AUTHENTICATION"/>	<input type="button" value="RESOURCES"/>	<input type="button" value="EXPORT"/>

14. Under Response formatters, select the **json** option.
15. Select **application/x-www-form-urlencoded** and **multipart/form-data** options for request parsing.
16. Click **Save**.

7.1.3 Creating Content Type

1. At the toolbar click, **Structure**.
2. Click **Content type**.
3. At the list of content types, make sure you are editing the Basic page. Click **Manage fields**.
4. Enter the name of the field in **Add new field** textbox (in this example we will be using an Image content type; set its field type to **Image**).
5. Click **Save**.

LABEL	MACHINE NAME	FIELD TYPE	WIDGET	OPERATIONS
+ Title	title	Node module element		
+ Body	body	Long text and summary	Text area with a summary	edit delete

Add new field

field_images [Edit]

Images Image

Type of data to store. Form element to edit the data.

Add existing field

- Select an existing field - - Select a widget -

Field to share. Form element to edit the data.

Save

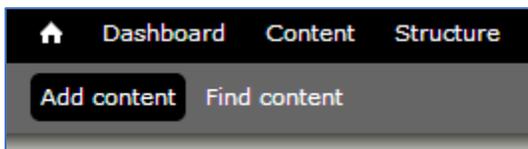
6. At the Images field settings, set the upload destination to Public files.
7. Click Save field settings. The basic page settings for the Image field will be displayed. Set the File directory to images. Note: this will serve as a root folder once you load the root folders in the Drupal ECP

File directory

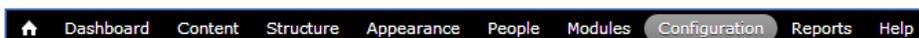
images

Optional subdirectory within the upload destination where files will be stored.

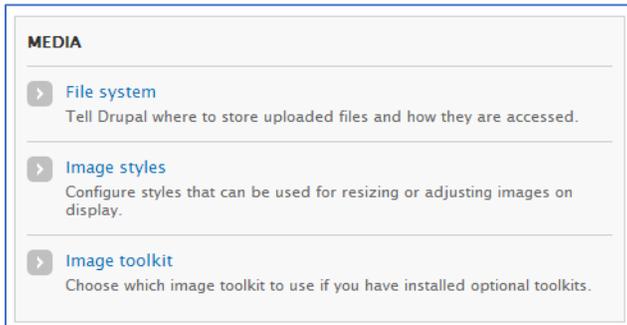
8. Click Save settings.
9. Click Add content.



10. Click Basic page. This enables us to create a new file within the Drupal ECP by attaching an image file to the content.
11. Enter the title of the file and choose image file.
12. Click **Save**.
13. On the toolbar, Click **Configuration**.



14. Click **File system**.



15. Take note of the value of the Public file system path (this serves as the Public folder at the RPI Drupal ECP plugin).



7.2 Umbraco

This section describes how to deploy the extension library on an existing Umbraco content management system (CMS) v7.15.2 web application.

1. In the Redpoint Interaction Deployment Files, locate and open the *Plugins Services\Umbraco\bin* folder.
2. Locate and copy the following libraries:

RedPoint.UmbracoService7.dll
RedPoint.Plugins.Localization.dll
RedPoint.Shared.Localization.dll

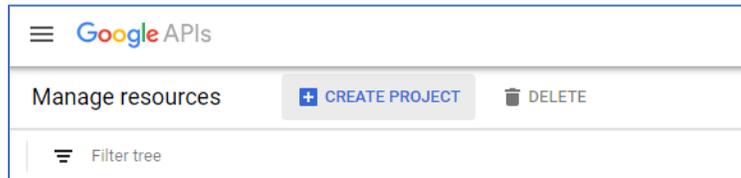
3. Paste the files into the Umbraco CMS bin directory e.g. *..\\wwwUmbraco752\\bin*

7.3 Google Drive

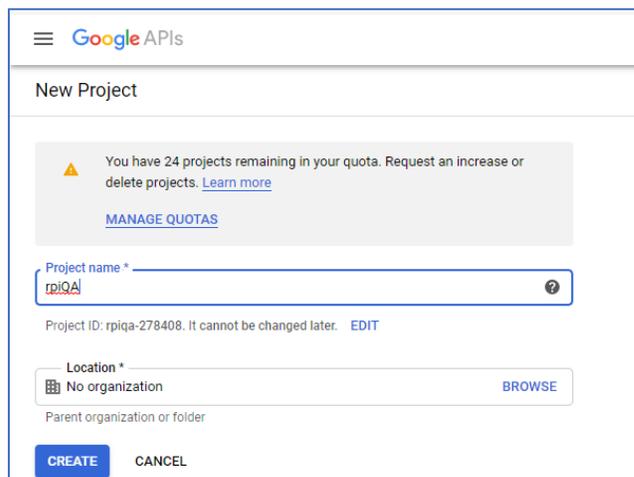
7.3.1 Creating and Configuring a Google Project

This section describes how to create and configure a new Google project. Please follow the steps below:

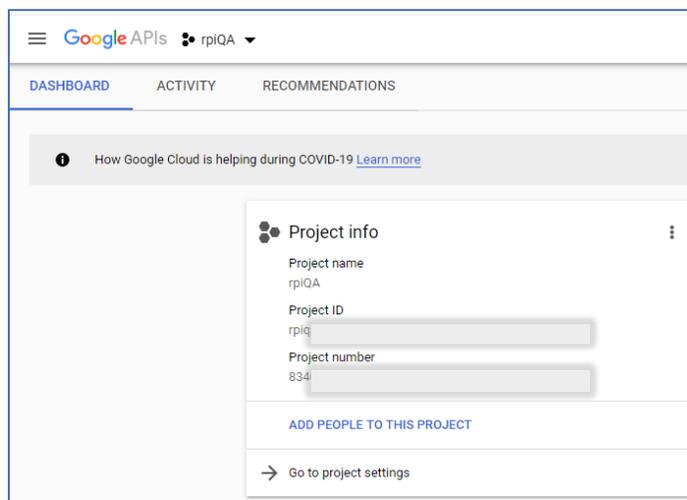
1. In a web browser, log into the Google API console (<https://code.google.com/apis/console>) using a Gmail account.
2. If this is your first time accessing the Google Developer Console, create a new project by clicking the **Create Project** button. If not, skip this step.



3. Enter the name of the project and click the **Create** button.



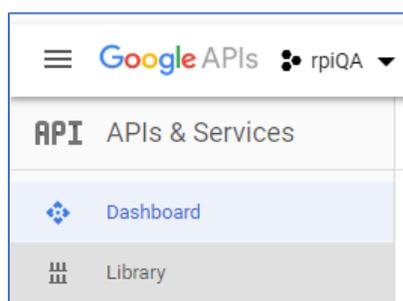
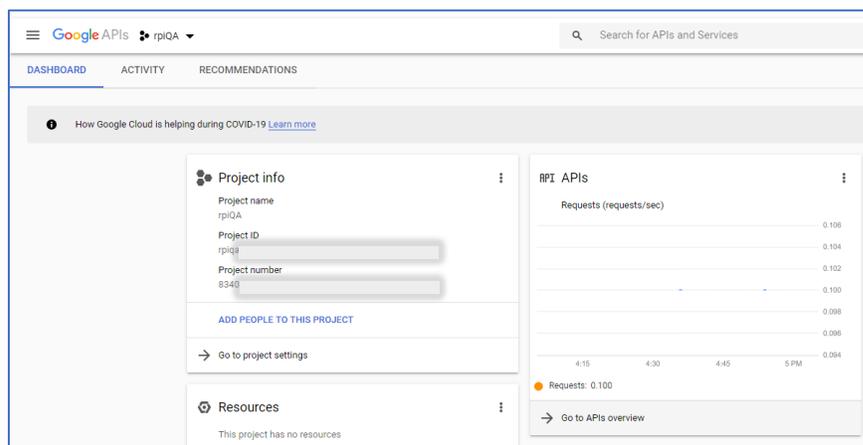
4. Once you have successfully created the project, double-click the Project Name.



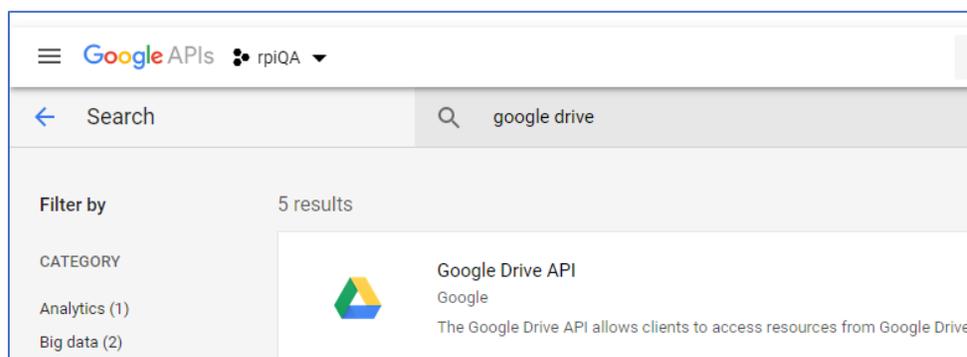
7.3.2 Enabling the Google Drive API

This section describes how to enable the Google Drive API. Please follow the steps below:

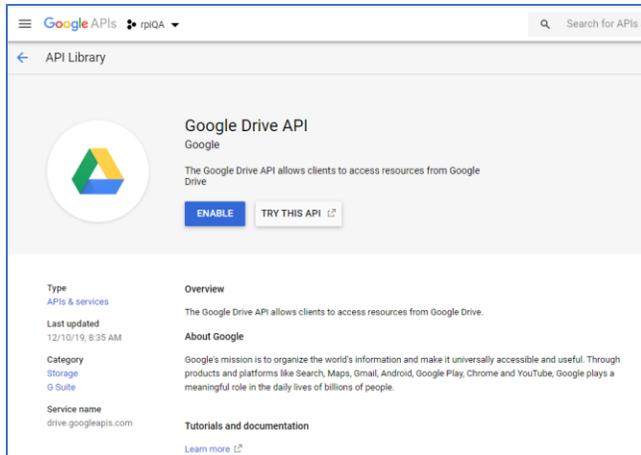
1. From Google Project's dashboard click Go to APIs overview > Library



2. In the API Library, search for Google Drive.



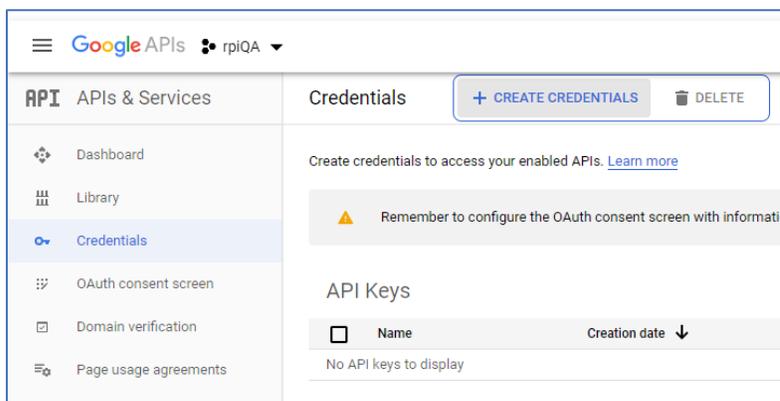
3. Once Google Drive has been found, click **Google Drive API** and **Enable**.



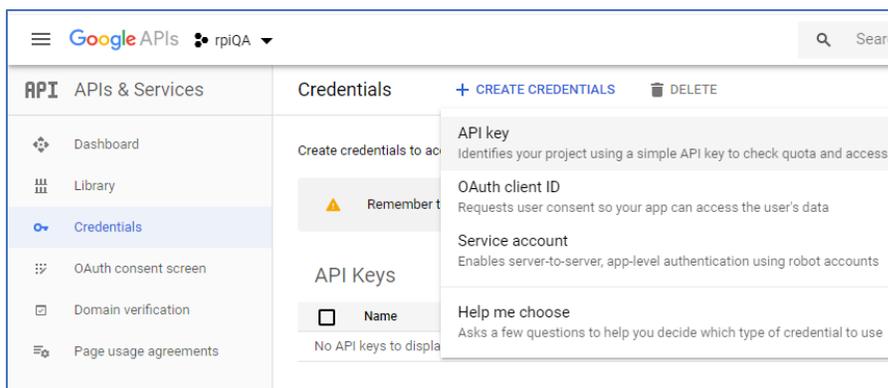
7.3.3 Provisioning New API Credentials

This section describes how to provision the Google Drive API to be utilized in Redpoint Interaction's Google Drive external content provider.

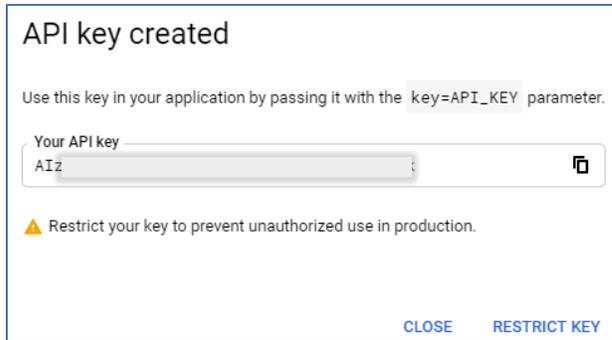
1. From Google Project's dashboard click Go to APIs overview > Credentials.



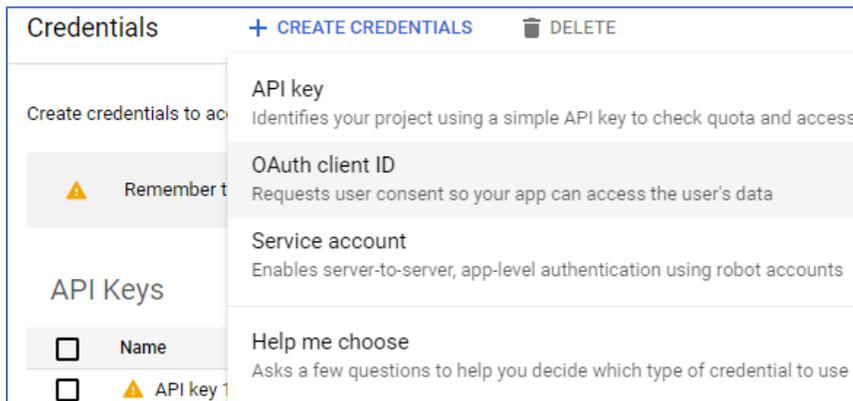
2. Click Create Credentials and choose API Key.



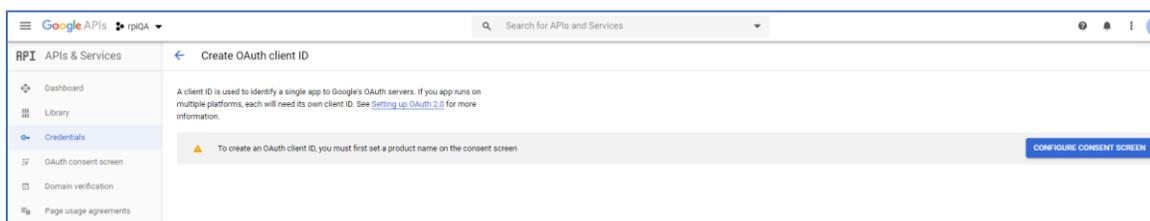
3. Take note of your newly created API key.

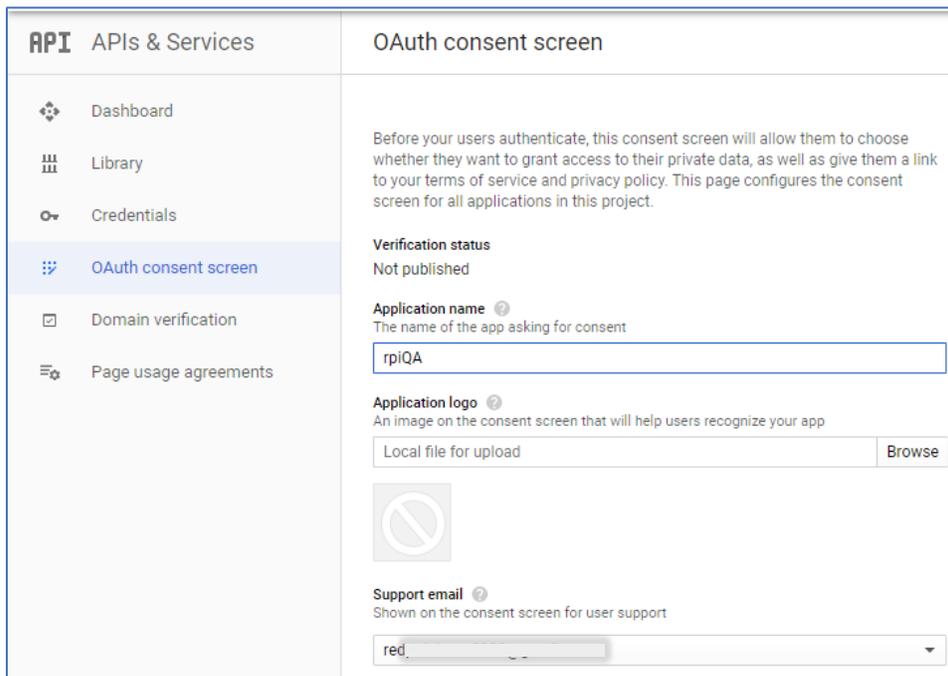
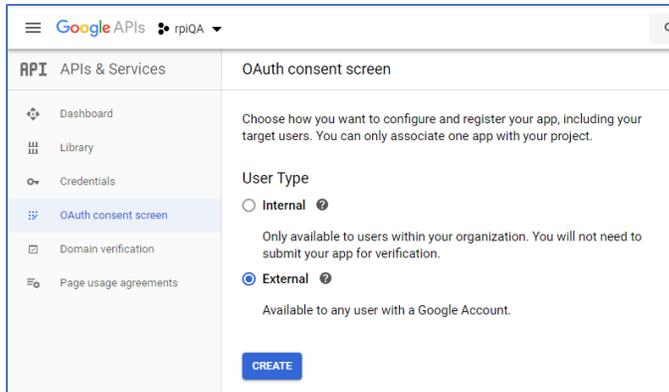


- Return to the Credentials tab, click **Create credentials** and choose **OAuth client ID**.



- Click **New Credentials**, then select **OAuth client ID**.
- Note:** If you are unsure whether OAuth 2.0 is appropriate for your project, select **Help me choose** and follow the instructions to pick the right credentials.
- Select the appropriate application type for your project and enter any additional information required. Application types are described in more detail in the following sections.
- If this is your first time creating a client ID, you can also configure your consent screen by clicking **Consent Screen**. (The [following procedure](#) explains how to set up the Consent screen.) You will not be prompted to configure the consent screen after you do it the first time.





9. Click **Create** to create client ID.

Google APIs rplQA

APIs & Services

← Create OAuth client ID

A client ID is used to identify a single app to Google's OAuth servers. If you app runs on multiple platforms, each will need its own client ID. See [Setting up OAuth 2.0](#) for more information.

Application type *
Web application

[Learn more](#) about OAuth client types

Name *
Web client 1

The name of your OAuth 2.0 client. This name is only used to identify the client in the console and will not be shown to end users.

The domains of the URIs you add below will be automatically added to your [OAuth consent screen](#) as [authorized domains](#).

Authorized JavaScript origins ⓘ
For use with requests from a browser

+ ADD URI

Authorized redirect URIs ⓘ
For use with requests from a web server

+ ADD URI

CREATE CANCEL

OAuth client created

The client ID and secret can always be accessed from **Credentials** in **APIs & Services**

ⓘ OAuth is limited to 100 [sensitive scope logins](#) until the [OAuth consent screen](#) is verified. This may require a verification process that can take several days.

Your Client ID
834027[redacted]aoufnfop1bm09oq4m4qv6.apps.googleusercontent.com

Your Client Secret
aSy10r[redacted]

- To delete a client ID, go to the **Credentials** page, check the box next to the ID, and then click **Delete**.

Google APIs | ip1QA | Search for APIs and Services

APIs & Services | Credentials | + CREATE CREDENTIALS | DELETE

Create credentials to access your enabled APIs. [Learn more](#)

API Keys

<input type="checkbox"/>	Name	Creation date ↓	Restrictions	Key	Usage with all services (last 30 days) ⓘ	
<input type="checkbox"/>	API key 1	May 26, 2020	None	A1zaB- At...7Dnykicq8vk	0	

OAuth 2.0 Client IDs

<input type="checkbox"/>	Name	Creation date ↓	Type	Client ID	
<input type="checkbox"/>	Web client 1	May 28, 2020	Web application	834827726767-91fa...	

Service Accounts

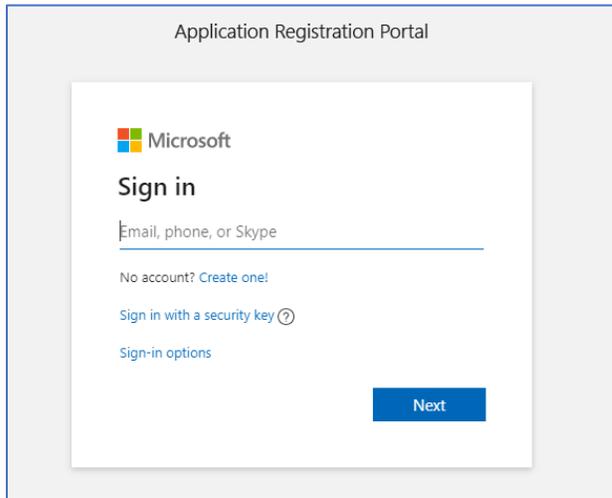
[Manage service accounts](#)

<input type="checkbox"/>	Email	Name ↑	Usage with all services (last 30 days) ⓘ
No service accounts to display			

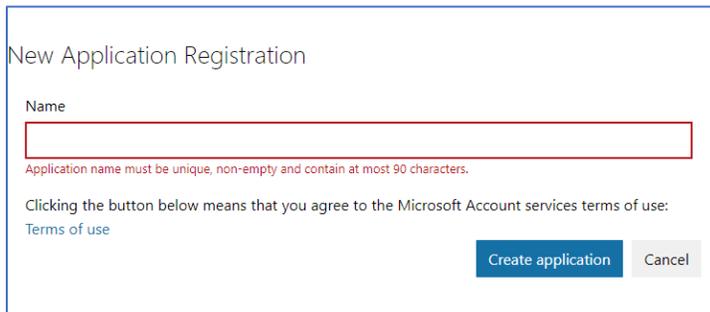
7.4 Microsoft OneDrive

This section describes how to configure Microsoft OneDrive for use by RPI.

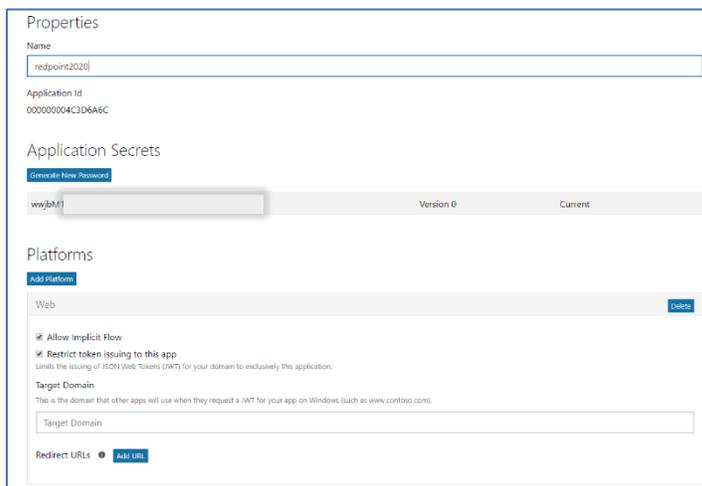
1. In a web browser, logon to the Microsoft Live Management Site (<https://account.live.com/developers/applications/create>).



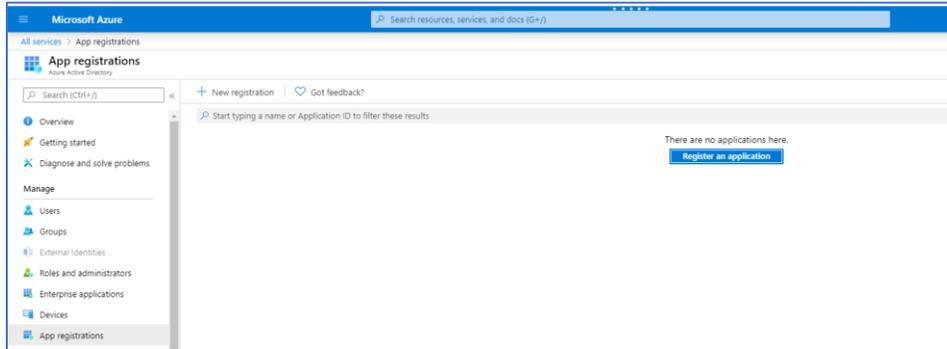
2. Following a successful log on, enter the Application name (Redpoint Interaction) and click the Create application button.

A screenshot of the "New Application Registration" form. The form has a white background with a blue border. At the top is the heading "New Application Registration". Below that is a "Name" label and a red-outlined text input field. Underneath the input field is a red error message: "Application name must be unique, non-empty and contain at most 90 characters." Below the error message is a line of text: "Clicking the button below means that you agree to the Microsoft Account services terms of use:" followed by a blue link "Terms of use". At the bottom right are two buttons: a blue "Create application" button and a gray "Cancel" button.

3. Following successful creation of the application, add a valid Redirect URL and click the Save button.

A screenshot of the application properties page. The page has a white background with a blue border. At the top is the heading "Properties". Below that are three sections: "Name" with a text input field containing "redpoint2020"; "Application Id" with a text input field containing "00000004c3d6a6c"; and "Application Secrets" with a "Generate New Password" button and a table with columns "Key", "Version", and "Current". The "Key" column contains "wvjbMf". Below that is the "Platforms" section with an "Add Platform" button and a "Web" platform entry. Under "Web" are two checked checkboxes: "Allow Implicit Flow" and "Restrict token issuing to this app". Below these are a "Target Domain" label and a text input field containing "Target Domain". At the bottom is a "Redirect URLs" section with an "Add URL" button.

- To check the values of Client ID and Client Secret, log into [Microsoft Azure](#) using your credentials.
- Go to Azure Active Directory > App registrations and click on Register an Application.



- Enter the application's NAME, select the desired option in Supported account types, select the Web option and specify a Redirect URL. click the Register button.

All services > App registrations > Register an application

Register an application

⚠ This application will not be associated with any directory and will be subject to limitations. You should not create production apps outside of a directory.

*** Name**
The user-facing display name for this application (this can be changed later).

Supported account types
Who can use this application or access this API?

Accounts in any organizational directory (Any Azure AD directory - Multitenant)

Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

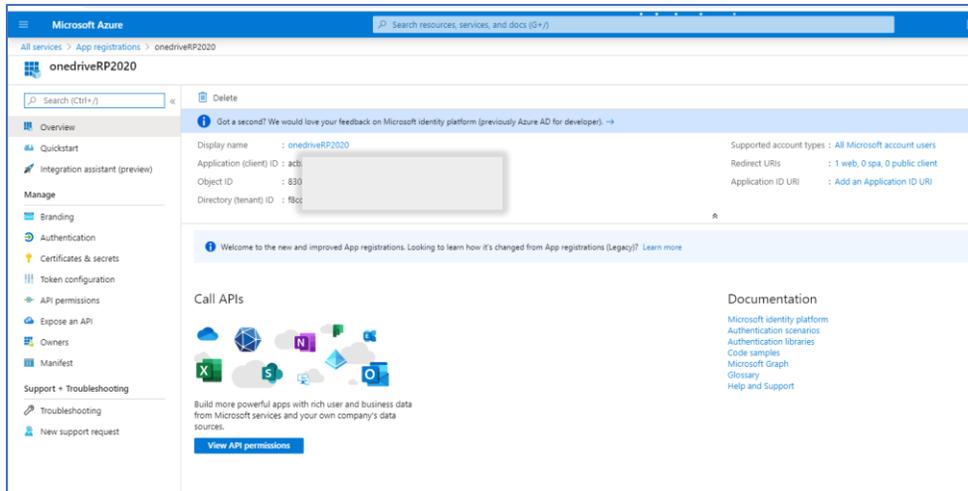
Personal Microsoft accounts only

[Help me choose...](#)

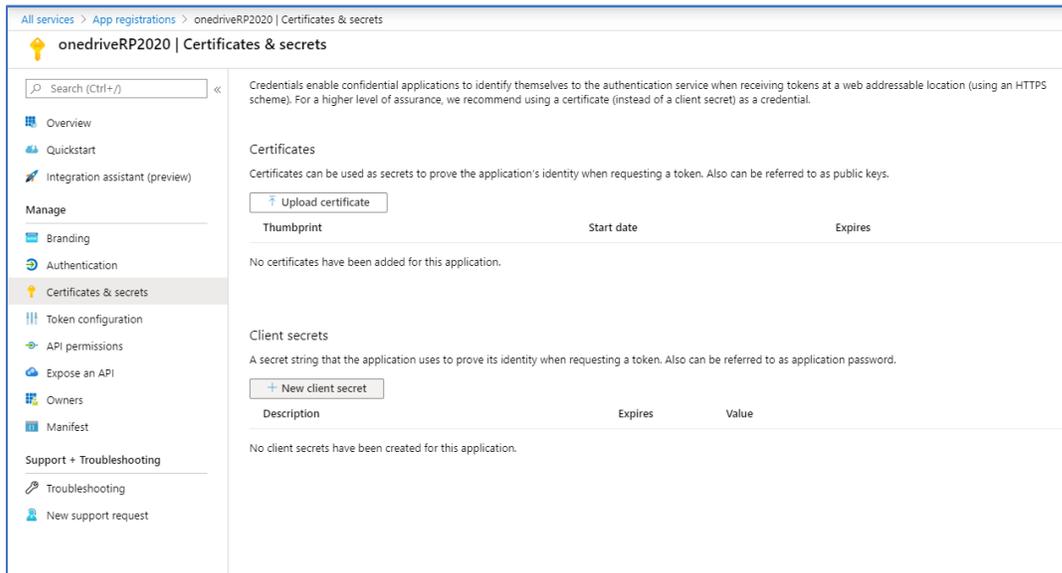
Redirect URI (optional)
We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

By proceeding, you agree to the [Microsoft Platform Policies](#)

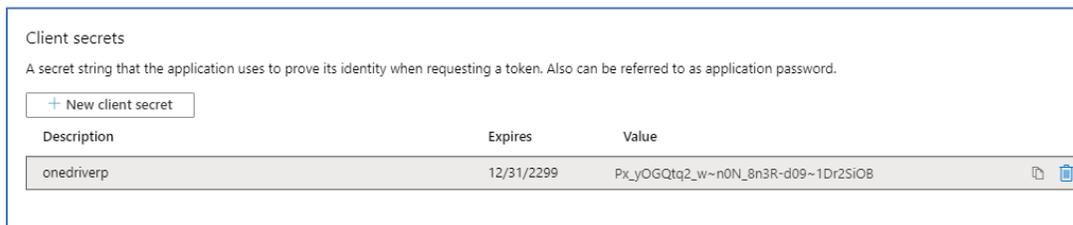
- Copy the Application (Client) ID. Go to Certificates and Secret.



8. Click on New Client Secret



9. Enter description, select expiry time, and click Add.

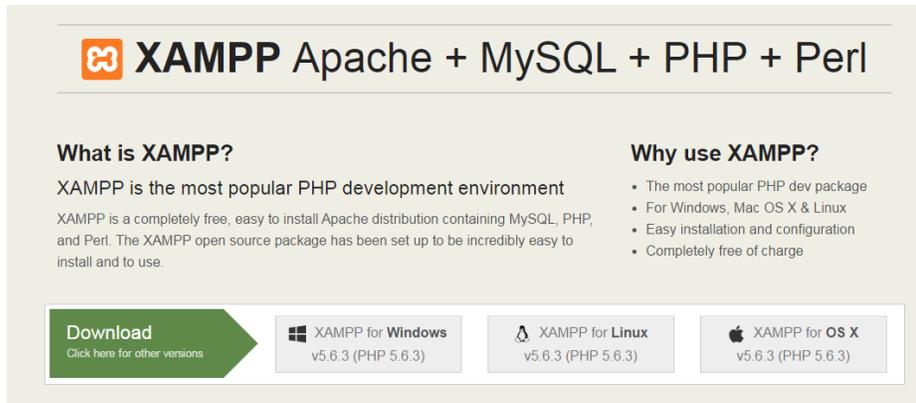


7.5 Concrete5

7.5.1 PHP Server Installation

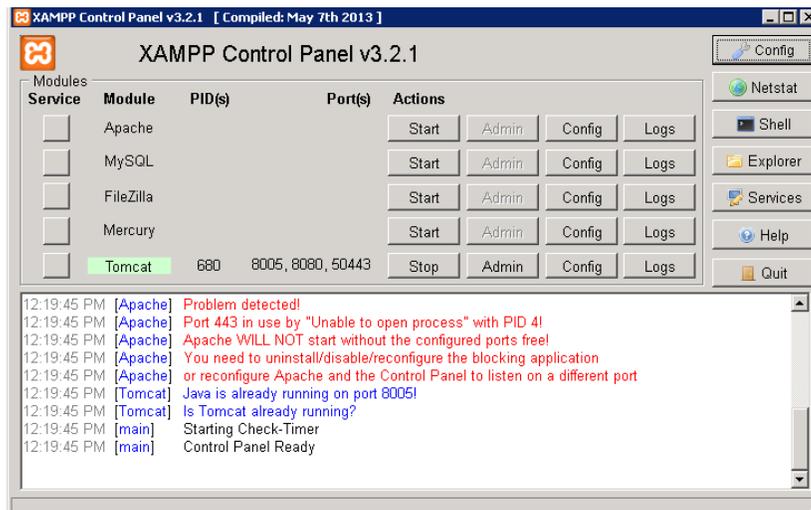
This document outlines how to setup Concrete5.3.2 for integration with the RPI Concrete5 external content provider plugin. Please follow the steps below:

1. Install XAMPP if there is no PHP server has yet to be set up. Otherwise, skip this step. You can download the installer from <https://www.apachefriends.org/index.html>



The image shows the XAMPP download page. It features the XAMPP logo and the text "XAMPP Apache + MySQL + PHP + Perl". Below this, there are two columns: "What is XAMPP?" and "Why use XAMPP?". The "What is XAMPP?" section states that XAMPP is the most popular PHP development environment, a completely free, easy-to-install Apache distribution containing MySQL, PHP, and Perl. The "Why use XAMPP?" section lists four reasons: it's the most popular PHP dev package, works on Windows, Mac OS X & Linux, has easy installation and configuration, and is completely free of charge. At the bottom, there are four download buttons: "Download" (with a link to other versions), "XAMPP for Windows v5.6.3 (PHP 5.6.3)", "XAMPP for Linux v5.6.3 (PHP 5.6.3)", and "XAMPP for OS X v5.6.3 (PHP 5.6.3)".

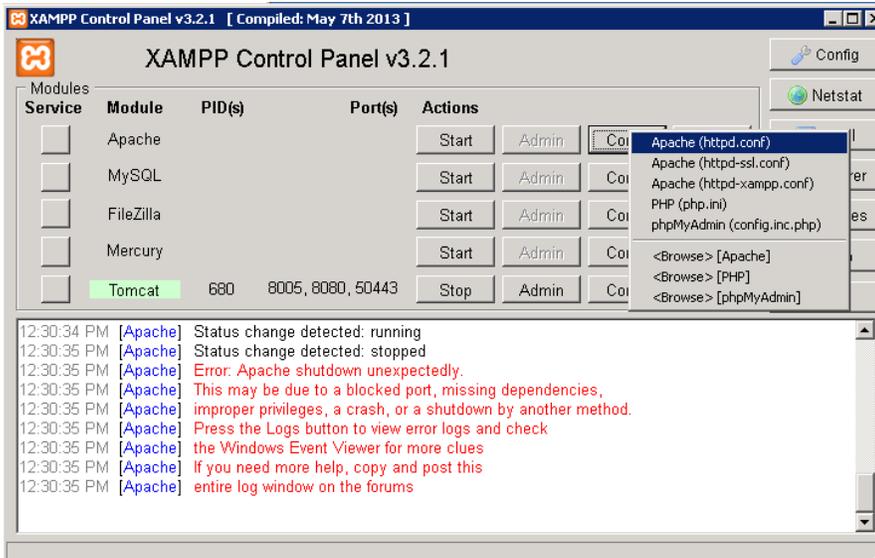
2. Launch the XAMPP Control Panel from the Start Menu.



The image shows a screenshot of the XAMPP Control Panel v3.2.1. The window title is "XAMPP Control Panel v3.2.1 [Compiled: May 7th 2013]". The main area displays a table of modules with columns for Service, Module, PID(s), Port(s), and Actions. The modules listed are Apache, MySQL, FileZilla, Mercury, and Tomcat. The Tomcat module is highlighted in green. Below the table, there is a log window showing the following messages:

```
12:19:45 PM [Apache] Problem detected!  
12:19:45 PM [Apache] Port 443 in use by "Unable to open process" with PID 4!  
12:19:45 PM [Apache] Apache WILL NOT start without the configured ports free!  
12:19:45 PM [Apache] You need to uninstall/disable/reconfigure the blocking application  
12:19:45 PM [Apache] or reconfigure Apache and the Control Panel to listen on a different port  
12:19:45 PM [Tomcat] Java is already running on port 8005!  
12:19:45 PM [Tomcat] Is Tomcat already running?  
12:19:45 PM [main] Starting Check-Timer  
12:19:45 PM [main] Control Panel Ready
```

3. Start Apache and MySQL. You may encounter some errors regarding port numbers. To solve them, follow the steps below:
 - a) For an Apache problem, open the httpd.conf file by clicking the Config button.



b) Find all instances of port 80 and replace them with your desired port number.

```
# Prevent Apache from gr
#
#Listen 12.34.56.78:80
Listen 80

#
ServerName localhost:80
```

c) Open the httpd-ssl.conf file using the Config button. Find all instances of port 443 and replace them with your desired SSL port number.

```
# Standard HT
#
Listen 443

<virtualHost _default_:443>

# General setup for the virtual host
DocumentRoot "C:/xampp/htdocs"
ServerName www.example.com:443
ServerAdmin admin@example.com
ErrorLog "C:/xampp/apache/logs/error.log"
TransferLog "C:/xampp/apache/logs/access.log"
```

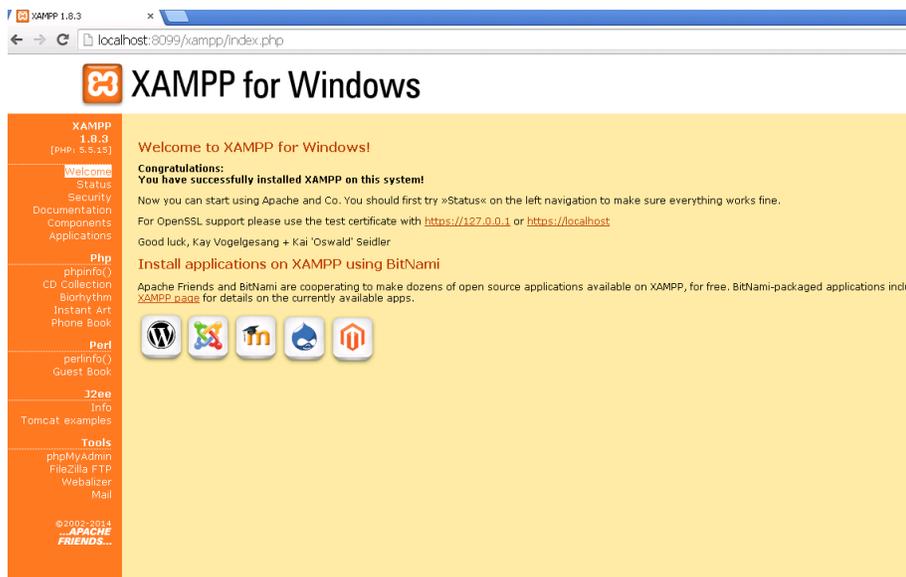
Module	PID(s)	Port(s)	Actions
Apache	5008 4536	8097, 8099	Stop
MySQL	5228	3306	Stop

4. Open a web browser and browse to: <http://localhost:<port number>>. You should see the following page:

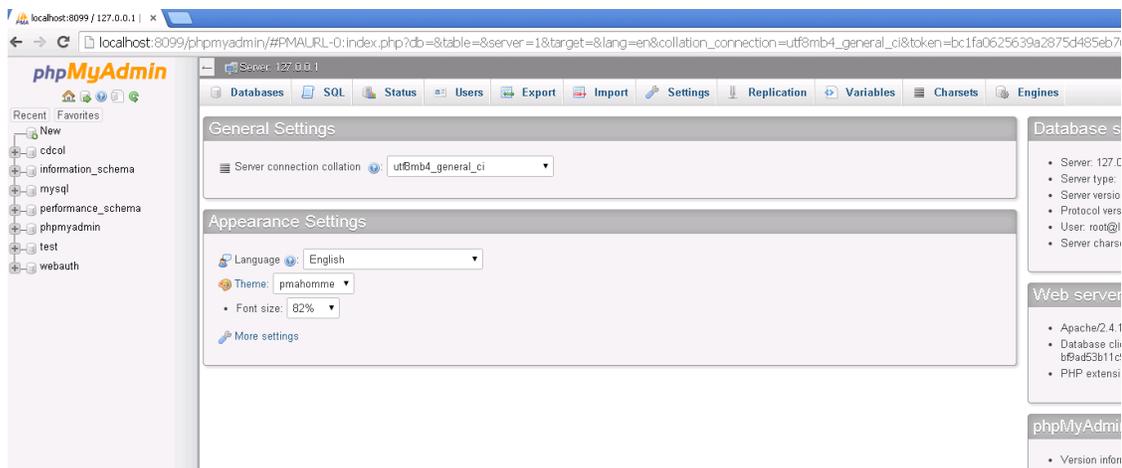


[English](#) / [Deutsch](#) / [Français](#) / [Nederlands](#) / [Polski](#) / [Italiano](#) / [Norwegian](#) / [Español](#) / [中文](#) / [Português \(Brasil\)](#) / [日本語](#)

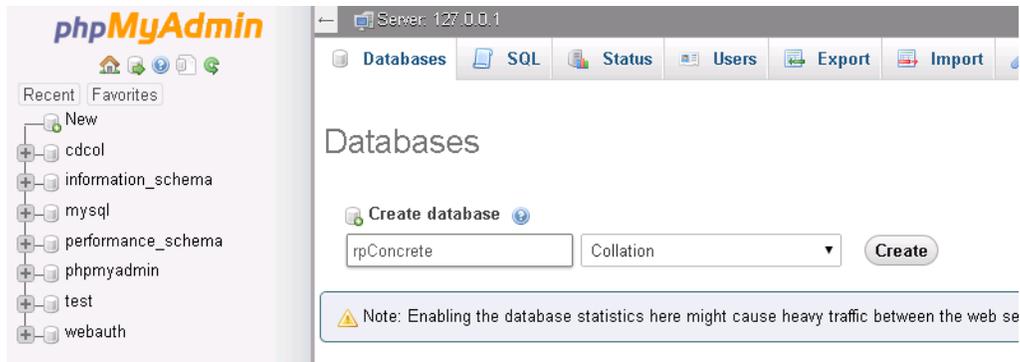
5. Click English and you will be taken to the following page:



6. Click phpMyAdmin under Tools from the left-hand menu. You will be taken to the following page:

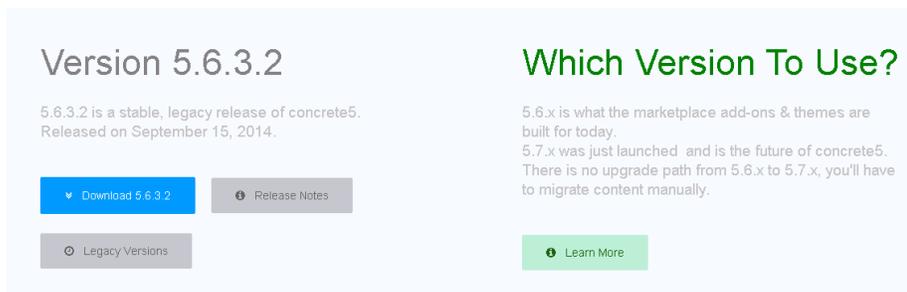


7. Click New. Type the database name in the right-hand panel. In the screenshot below, the database name is rpConcrete. Click Create.

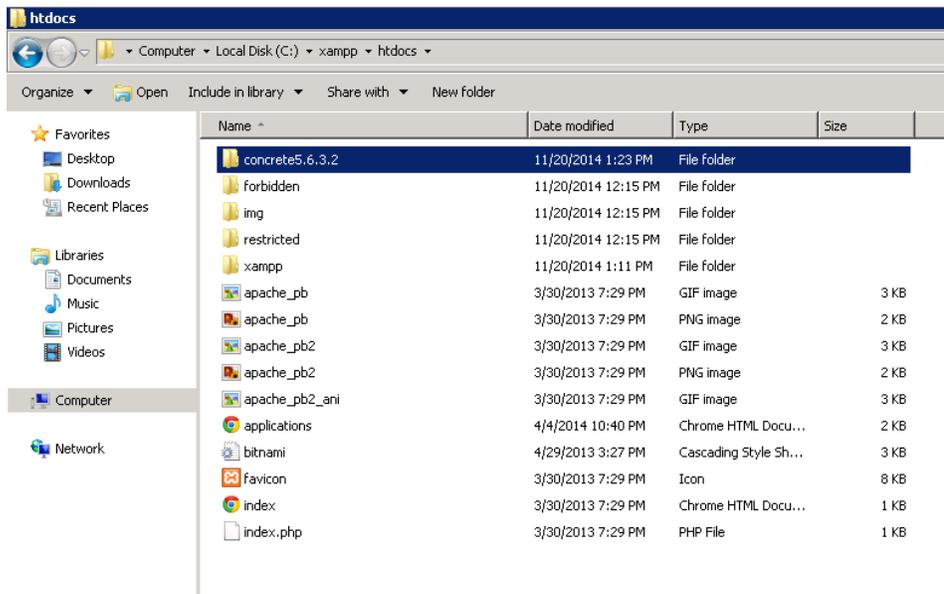


7.5.2 Concrete5 Installation

1. Download Concrete5.6.3.2 from: <http://www.concrete5.org/get-started>. Choose Version 5.6.3.2.



2. Extract the Concrete5 zip file and move it to C:\xampp\htdocs.



3. Get the Slim Framework for Concrete5 from the "DeploymentFiles\Plugins Services\Concrete5" directory of the Redpoint Interaction Deployment file". Extract the zip file.

Name	Date modified	Type	Size
index.php	11/19/2014 7:18 PM	PHP File	10 KB
RedPointInteractionCSServices.php	11/19/2014 7:26 PM	PHP File	7 KB
slim-concrete5-master.zip	10/27/2014 5:06 PM	WinRAR ZIP archive	106 KB

- In C:\xampp\htdocs, create a new folder. In the screenshot below, it's named c5app.

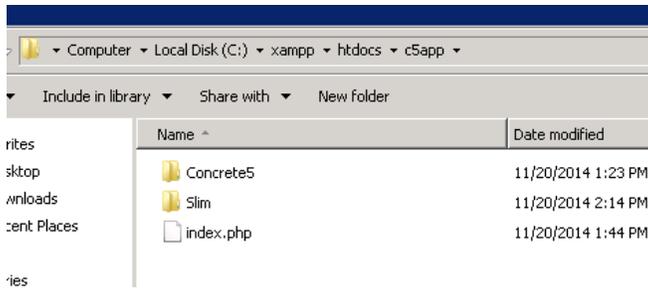
Name	Date modified	Type	Size
c5app	11/20/2014 2:07 PM	File folder	
concrete5.6.3.2	11/20/2014 1:23 PM	File folder	
forbidden	11/20/2014 12:15 PM	File folder	
img	11/20/2014 12:15 PM	File folder	
restricted	11/20/2014 12:15 PM	File folder	
xampp	11/20/2014 1:11 PM	File folder	
apache_pb	3/30/2013 7:29 PM	GIF image	3 KB
apache_pb	3/30/2013 7:29 PM	PNG image	2 KB
apache_pb2	3/30/2013 7:29 PM	GIF image	3 KB
apache_pb2	3/30/2013 7:29 PM	PNG image	2 KB
apache_pb2_ani	3/30/2013 7:29 PM	GIF image	3 KB
applications	4/4/2014 10:40 PM	Chrome HTML Docu...	2 KB
bitnami	4/29/2013 3:27 PM	Cascading Style Sh...	3 KB
Favicon	3/30/2013 7:29 PM	Icon	8 KB
index	3/30/2013 7:29 PM	Chrome HTML Docu...	1 KB
index.php	3/30/2013 7:29 PM	PHP File	1 KB

- Move the Concrete5.6.3.2 folder inside c5app. Rename it to Concrete5.

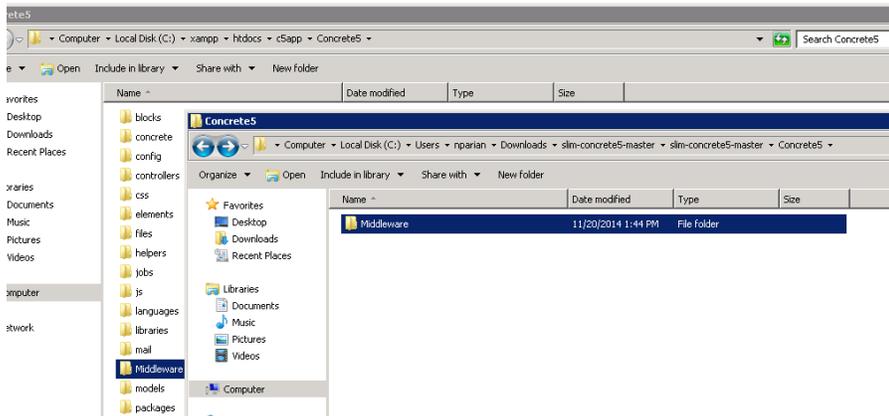
Name	Date modified	Type	Size
Concrete5	11/20/2014 1:23 PM	File folder	

- Back in the extracted Concrete5 zip file, copy the Slim folder and index.php file to the c5app folder.

Name	Date modified	Type	Size
Concrete5	11/20/2014 1:44 PM	File folder	
Slim	11/20/2014 1:44 PM	File folder	
tests	11/20/2014 1:44 PM	File folder	
.htaccess	11/20/2014 1:44 PM	HTACCESS File	1 KB
index.php	11/20/2014 1:44 PM	PHP File	9 KB
LICENSE	11/20/2014 1:44 PM	File	2 KB
phpunit.xml.dist	11/20/2014 1:44 PM	DIST File	1 KB
README.md	11/20/2014 1:44 PM	MD File	1 KB

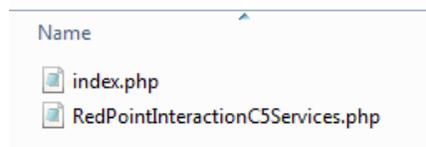


- In the extracted Concrete5 zip file, copy the Concrete5\Middleware folder to the c5app\Concrete5 folder in XAMPP.



- Copy the RedpointInteractionC5Services.php file from the "DeploymentFiles\Plugins Services\Concrete5" directory of the Redpoint Interaction Deployment files to the Middleware folder under c5app. Also, replace the index.php in c5app with the index.php file that came with the RedpointInteractionC5Services.php file.

Name	Date modified	Type	Size
Concrete5.php	11/20/2014 1:44 PM	PHP File	3 KB
Concrete5BasicAuth.php	11/20/2014 1:44 PM	PHP File	6 KB
RedPointInteractionC5Services.php	11/19/2014 7:26 PM	PHP File	7 KB

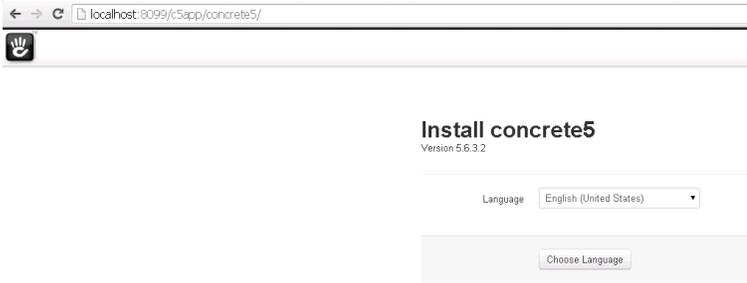


- Open the Concrete5.php file and edit the DIR_BASE definition. Make sure it matches the directory you have set up.

```
private function _bootConcrete() {
    /* Set the execute const */
    define('CS_EXECUTE', true);

    /* Set the base path to Concrete5 installation directory */
    define('DIR_BASE', 'C:/xampp/htdocs/c5app/Concrete5'); // '/path/to/concrete5';
}
```

- Browse to <http://localhost:<port>/<foldername>/<concrete5folder>>. The following page will be shown:



11. Choose English as the language and click the Choose Language button. In the next screen, click Continue to Installation.
12. Complete the following information. Use the database you created earlier. Click Install concrete5.

Install concrete5

Version 5.6.3.2

Site Information	Database Information
Name Your Site: <input type="text" value="RedPointC5"/>	Server: <input type="text" value="localhost"/>
Administrator Information	MySQL Username: <input type="text" value="root"/>
Email Address: <input type="text" value="email@address.com"/>	MySQL Password: <input type="password"/>
Password: <input type="password" value="*****"/>	Database Name: <input type="text" value="rpConcrete5"/>
Confirm Password: <input type="password" value="*****"/>	

Sample Content

- Empty Site**
Install only items required for concrete5 to run. This will create a blank site.
- Sample Content with Blog**
A great starting point for an attractive website with a blog.

concrete5 veterans can choose "Empty Site," but otherwise we recommend starting with some sample content.

[Install concrete5](#)

Install concrete5

Version 5.6.3.2



Troubleshooting

Installation should not take more than an hour. If you get stuck in installation with the message "Installing Dashboard", resolve the issue with the following steps:

- In XAMPP's Control Panel, click the Config button for Apache and open the php.ini file.

- Look for the variable: `max_execution_time` and set its value to higher than 30. (e.g. `max_execution_time=180`)
- You may set also the following variables to allow large file sizes:
 - `max_input_vars = 1000000`
 - `upload_max_filesize = 1000M`
 - `post_max-size = 1000M`
 Then remove ":" or ";" preceding such variables. You will also need to restart Apache.
- In XAMPP's Control Panel, click the Config button for MySQL and open the `my.ini` file.
- Locate the lines of text below:


```
# The MySQL server
[mysqld]
port= 3306
```
- Add the text below after the 'port' line:


```
lower_case_table_names = 2
default-storage-engine=MyISAM
```
- Drop the database you have created then recreate it.
- Go back to step #10 of this guide.

13. After the installation, browse to: `http://localhost:<port>/<sitename>/index.php`. A log-in dialog will be displayed. Type 'admin' in the username and your previously-selected password.

Authentication Required

The server `http://localhost:8099` requires a username and password. The server says: Concrete5 API.

User Name:

Password:

Log In Cancel

Slim

Welcome to Slim!

Congratulations! Your Slim application is running. If this is your first time using Slim, start with this ["Hello World" Tutorial](#).

You have access to the Concrete5 API for the site named RedPointC5. You have also logged on as admin via the Concrete5 Basic HTTP auth plugin for Slim.

Get Started

1. The application code is in `index.php`
2. Read the [online documentation](#)
3. Follow [@slimphp](#) on Twitter

Slim Framework Community

Support Forum and Knowledge Base

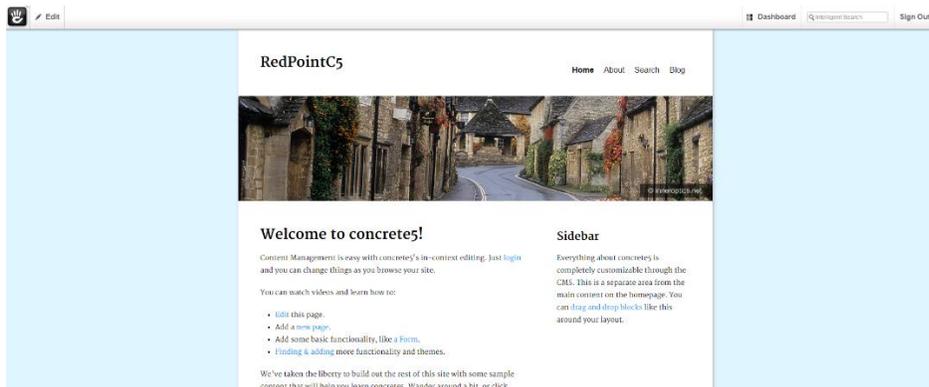
Visit the [Slim support forum and knowledge base](#) to read announcements, chat with fellow Slim users, ask questions, help others, or show off your cool Slim Framework apps.

Twitter

Follow [@slimphp](#) on Twitter to receive the very latest news and updates about the framework.

7.5.3 Concrete5 Management

To browse to a Concrete5 instance, navigate to: `http://localhost:[port]/[sitename]/Concrete5`. (e.g., `http://localhost:8099/c5app/Concrete5/`). You will see the page below:



Click on Dashboard at the upper right to bring up the Dashboard Panel.

Dashboard ? x

COMPOSER

- Write
- Drafts

SITEMAP

- Full Sitemap
- Flat View
- Page Search

FILES

- File Manager
- Attributes
- File Sets

MEMBERS

- Search Users
- User Groups
- Attributes
- Group Sets

REPORTS

- Statistics
- Form Results
- Surveys
- Logs

PAGES & THEMES

- Themes
- Page Types
- Attributes
- Single Pages

WORKFLOW

- Workflow List
- Waiting for Me

STACKS & BLOCKS

- Stacks
- Block & Stack Permissions
- Block Types

[News](#) - Learn about your site and concrete5.
[System & Settings](#) - Secure and setup your site.
[Extend concrete5](#) - Install, update or download more themes and add-ons.

Click File Manager under Files to view the files uploaded to Concrete5.

File Manager ? * x

Advanced Search ▾

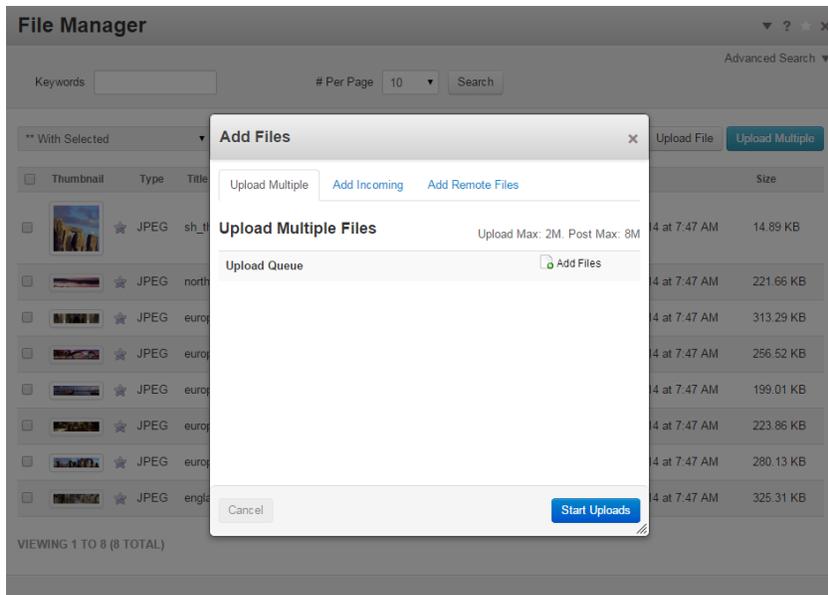
Keywords # Per Page 10 ▾

** With Selected ▾ No file chosen

<input type="checkbox"/>	Thumbnail	Type	Title	Added ▾	Active	Size
<input type="checkbox"/>		JPEG	sh_thumbnail.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	14.89 KB
<input type="checkbox"/>		JPEG	northern_az_lake_powell_house_boats.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	221.66 KB
<input type="checkbox"/>		JPEG	europe_spain_grenada_alhambra.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	313.29 KB
<input type="checkbox"/>		JPEG	europe_valencia_hemispheric.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	256.52 KB
<input type="checkbox"/>		JPEG	europe_rotterdam_port.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	199.01 KB
<input type="checkbox"/>		JPEG	europe_germany_munich_arch.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	223.86 KB
<input type="checkbox"/>		JPEG	europe_england_stonehenge.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	280.13 KB
<input type="checkbox"/>		JPEG	england_village.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	325.31 KB

VIEWING 1 TO 8 (8 TOTAL)

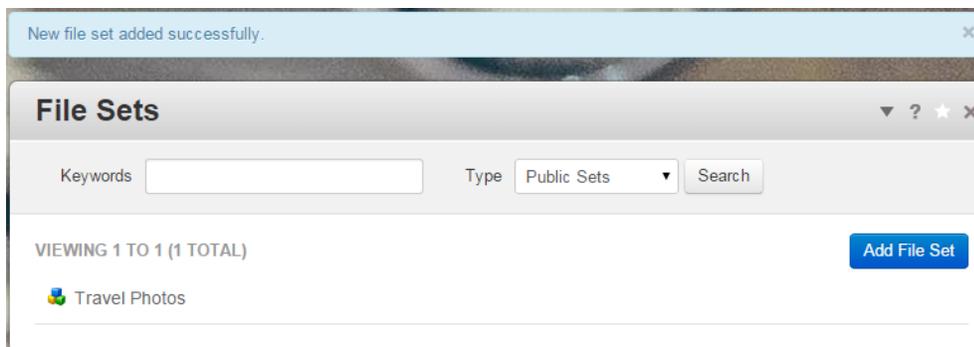
To upload a single file, click Choose File. After selection, click the Upload File button. To upload multiple files at the same time, click Upload Multiple and a new dialog box will appear.



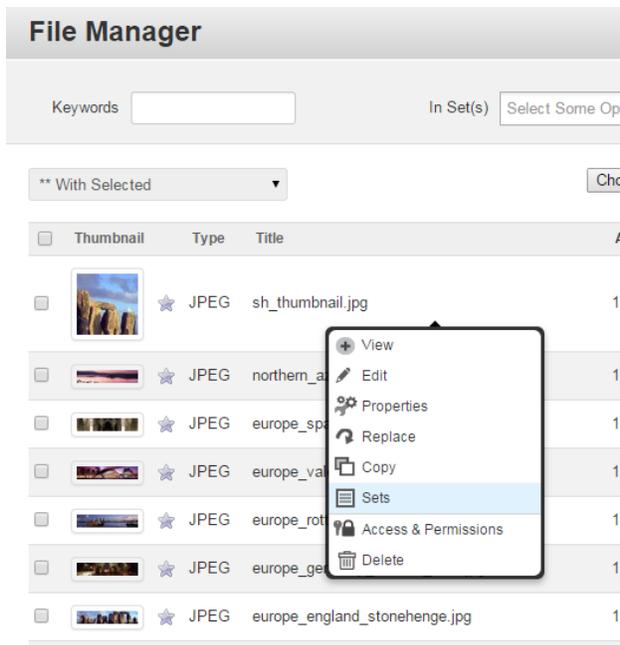
Folders are called Sets in Concrete5. In the Dashboard dialog, click File Sets under Files.



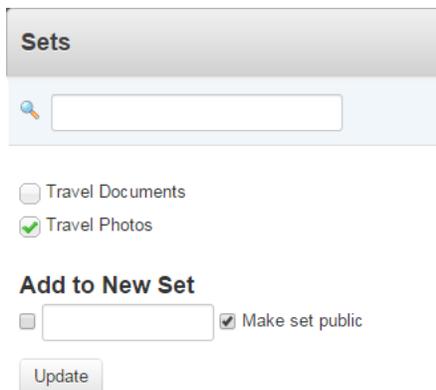
To create a Set, click the Add File Set button. Then type the Set name and click Add.



To assign a file into a set, go back to the File Manager. Click on the file and choose Sets from the drop-down menu.



In the Sets Window, the set(s) where the file will be assigned to and click Update.



To view files in a specific set, click the In Set(s) textbox and select the Set from the choices.

File Manager ? * x

Keywords In Set(s) # Per Page 10 Advanced Search ▾

** With Selected ▾

<input type="checkbox"/>	Thumbnail	Type	Title	Added	Active	Size
<input type="checkbox"/>		JPEG	sh_thumbnail.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	14.89 KB
<input type="checkbox"/>		JPEG	northern_az_lake_powell_house_boats.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	221.66 KB
<input type="checkbox"/>		JPEG	europa_spain_grenada_alhambra.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	313.29 KB
<input type="checkbox"/>		JPEG	europa_valencia_hemispheric.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	256.52 KB
<input type="checkbox"/>		JPEG	europa_rotterdam_port.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	199.01 KB
<input type="checkbox"/>		JPEG	europa_germany_munich_arch.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	223.86 KB
<input type="checkbox"/>		JPEG	europa_england_stonehenge.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	280.13 KB
<input type="checkbox"/>		JPEG	england_village.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	325.31 KB

File Manager ? * x

Keywords In Set(s) # Per Page 10 Advanced Search ▾

** With Selected ▾ No file chosen

<input type="checkbox"/>	Thumbnail	Type	Title	Added	Active	Size
<input type="checkbox"/>		JPEG	northern_az_lake_powell_house_boats.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	221.66 KB
<input type="checkbox"/>		JPEG	sh_thumbnail.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	14.89 KB
<input type="checkbox"/>		JPEG	europa_spain_grenada_alhambra.jpg	11/20/2014 at 7:47 AM	11/20/2014 at 7:47 AM	313.29 KB

VIEWING 1 TO 3 (3 TOTAL)

7.5.4 Concrete5 Users and Groups

To create a new Concrete5 user, open the Dashboard. Under Members click Search Users. In the Search User dialog, click the Add User button. Complete the information in the Add User dialog.

Add User ▼ ? ★ ✕

User Information

Username *	Password *
<input type="text"/>	<input type="password"/>
Email Address *	User Avatar
<input type="text"/>	<input type="button" value="Choose File"/> No file chosen

Language

English (United States) ▼

Registration Data

I would like to receive private messages.

Yes

Send me email notifications when I receive a private message.

Yes

Groups

Administrators

To create a User Group, open the Dashboard. Under Members click User Groups. In the Groups dialog, click the Add Group button. Complete the information in the Add User dialog.

Add Group ▼ ? ★ ✕

Name

Description

Group Expiration Options

Automatically remove users from this group

at a specific date and time ▼

To assign a user to a group, open the Dashboard. Under Members, click Search Users and select the user you want to assign to a group. In the View User dialog, click Edit User.

View User

▼ ? ★ ✕

Edit User
Deactivate User
Sign In as User
Delete User Account

Basic Details

foofighters
nathan.parian@yahoo.com
 Account created on 11/25/2014 at 8:21 AM. Last logged in from IP: 0.0.0.0.

User Attributes

I would like to receive private messages. Yes

Send me email notifications when I receive a private message. Yes

Groups

Administrators	11/25/2014 at 8:21:41 AM
----------------	--------------------------

In the Edit User dialog, click the Add Group button.

Edit User

▼ ? ★ ✕

User Information

Username *	Email Address *	User Avatar
<input type="text" value="foofighters"/>	<input type="text" value="nathan.parian@yahoo.com"/>	Choose File No file chosen

Change Password

(Leave these fields blank to keep the same password)

Password	Password (Confirm)
<input type="text"/>	<input type="text"/>

Default Language

English (United States) ▼

Groups

Add Group

Administrators

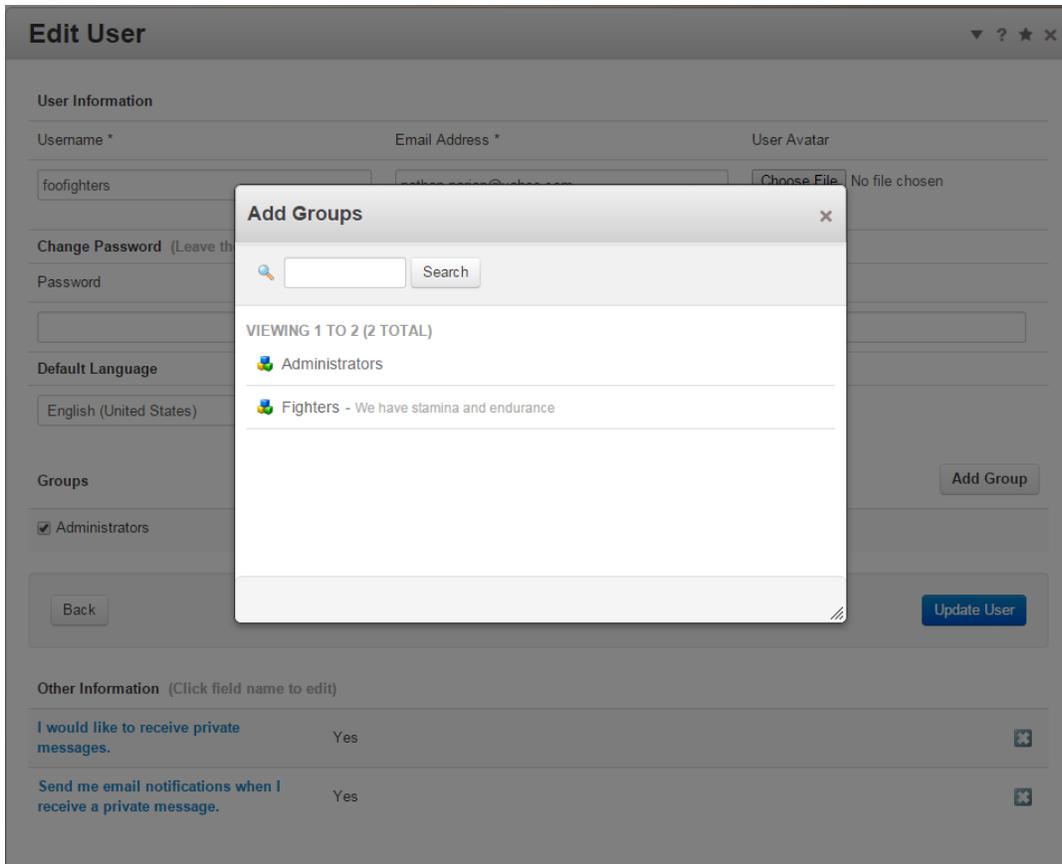
Back
Update User

Other Information

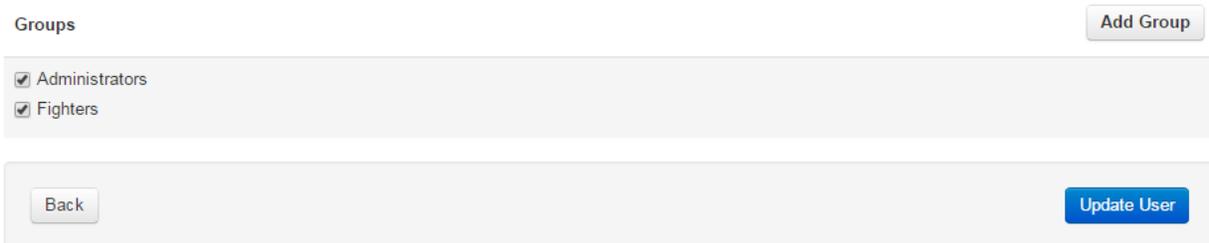
(Click field name to edit)

I would like to receive private messages.	Yes	✕
Send me email notifications when I receive a private message.	Yes	✕

Select the group to add in the Add Groups dialog.



The newly selected group should now be listed in the Edit User dialog. Click the Update User button.



7.5.5 Concrete5 System & Settings > Allowed File Types

To add a file type/extension, open the Dashboard. Click System & Settings. In the Permissions & Access section, click Allowed File Types. Type your file extension(s) and hit the Save button. Only files with the declared extensions will be allowed. Separate extensions with commas. Periods and spaces will be ignored.



7.6 Magento

7.6.1 Setting up XAMPP and Magento Admin Panel

1. Magento requires that XAMPP be installed. Download it at

<https://www.apachefriends.org/index.html>

Follow the XAMPP installation instructions.

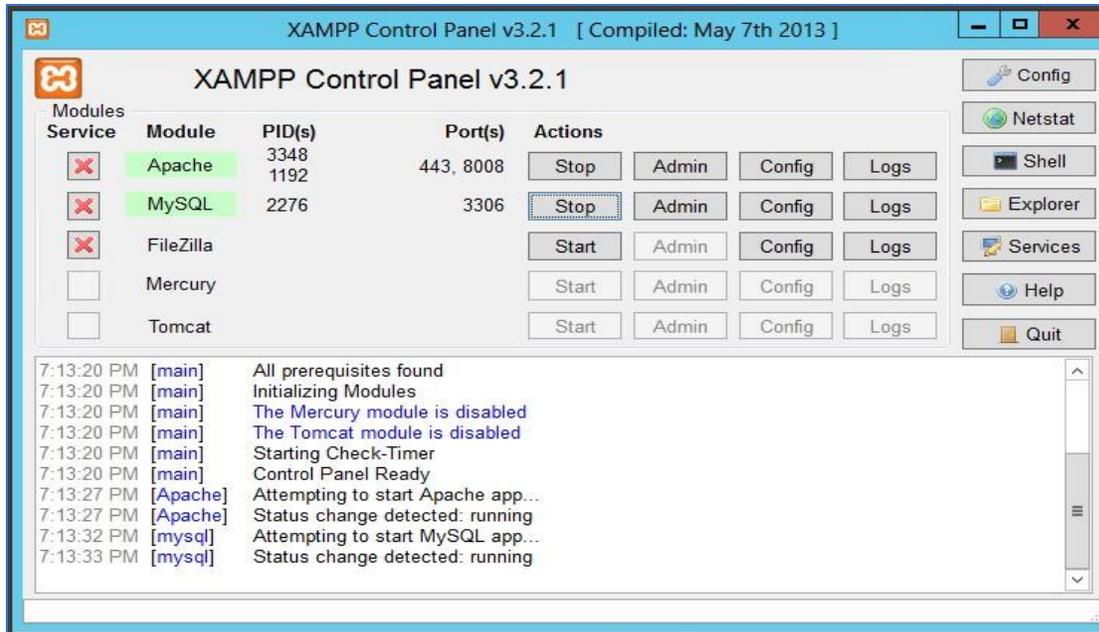
At Select Components, select only the following and click Next:

- MySQL
- PHP (By default, this is already selected)
- phpMyAdmin

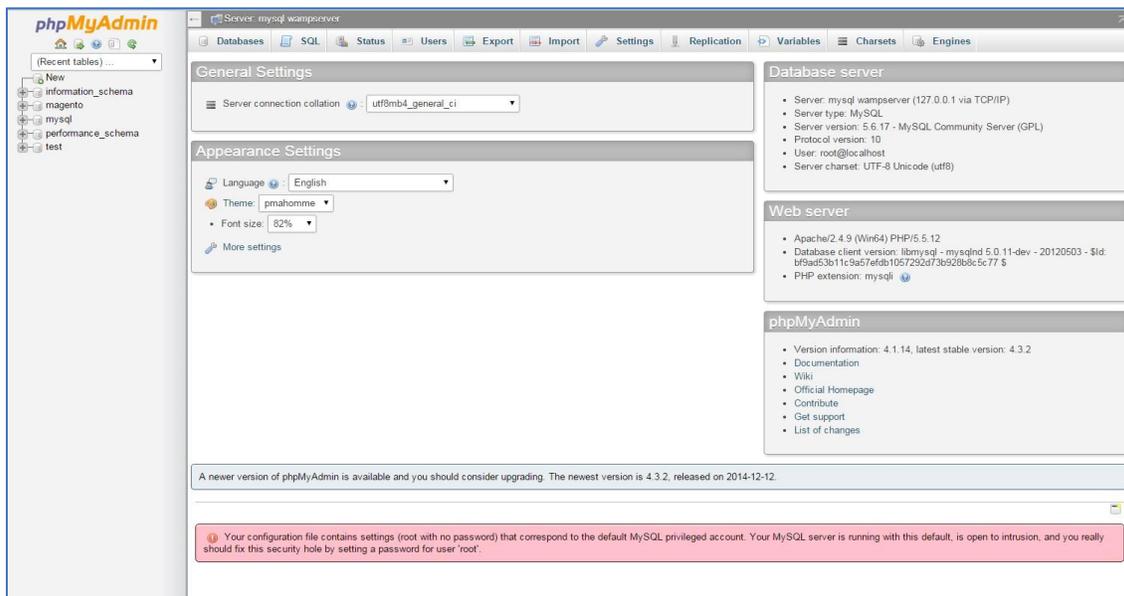


Run the XAMPP Control Panel.

Click the Start button for Apache and MySQL. It should look like the image below



2. Create the Magento database in MySQL prior to installing Magento. Click MySQL Admin button in the XAMPP control panel, doing redirects to phpMyAdmin (the MySQL database warehouse).

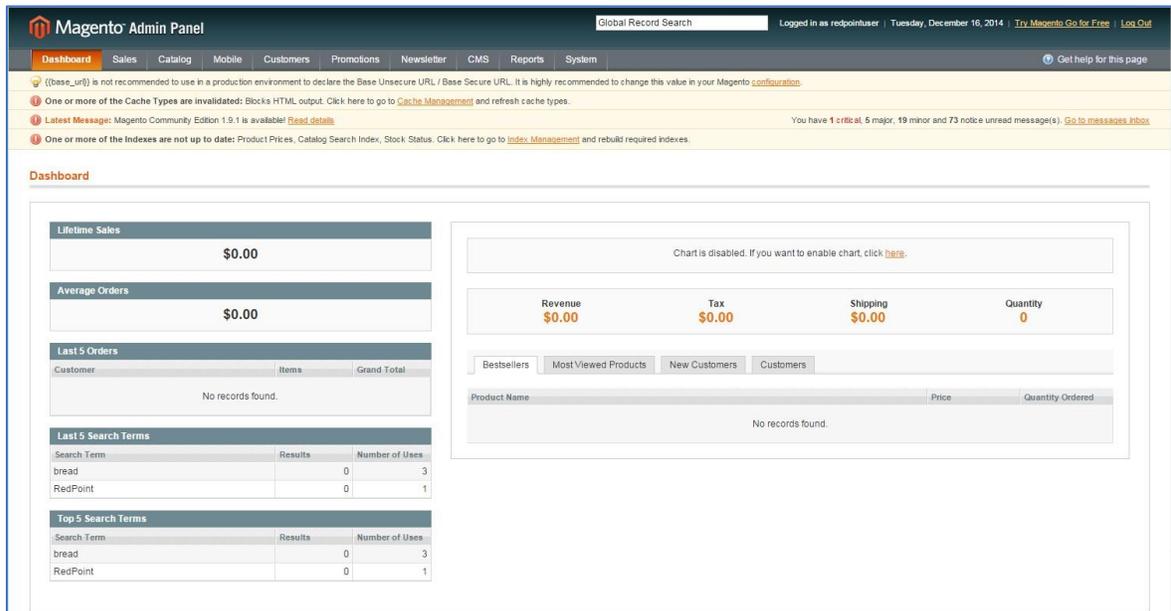


3. Browse to <https://www.apachefriends.org/add-ons.html> , choose Magento and download the Windows platform installer. This is a Community Edition of Magento.
4. Unpack/unzip the Magento installer.
5. Add the magento folder from the Magento zip file to the XAMPP htdocs folder (C:\Xampp\htdocs).
6. Browse to <http://127.0.0.1/magento/> (the Magento web-based installation wizard).

7. Follow the instructions.
8. In the installation procedure's Configuration section, type root in the User Name field and leave the User Password blank. Click continue
9. Upon completion of the setup, the encryption key will be provided.
10. Click the Go to Backend button to go the Magento Admin Panel. Use the username and password you created during installation to log in.

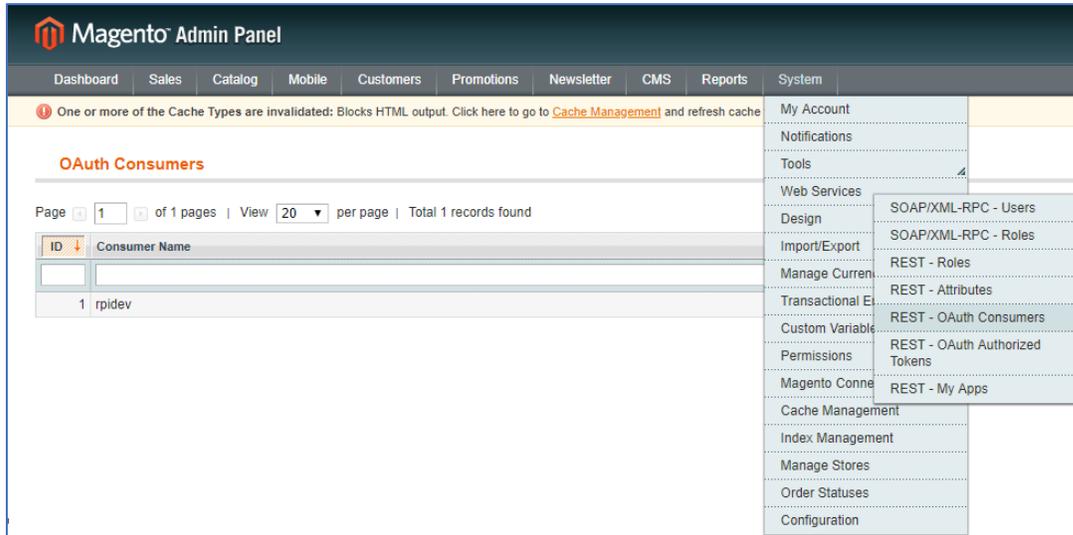


11. After logging in, the default Dashboard will be displayed.

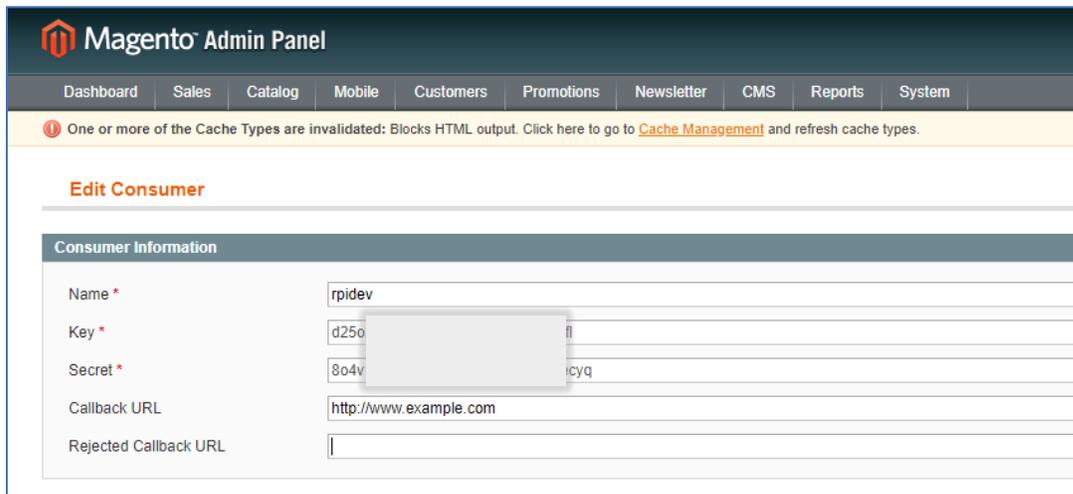


7.6.2 Setting up Credentials for RPI Configuration

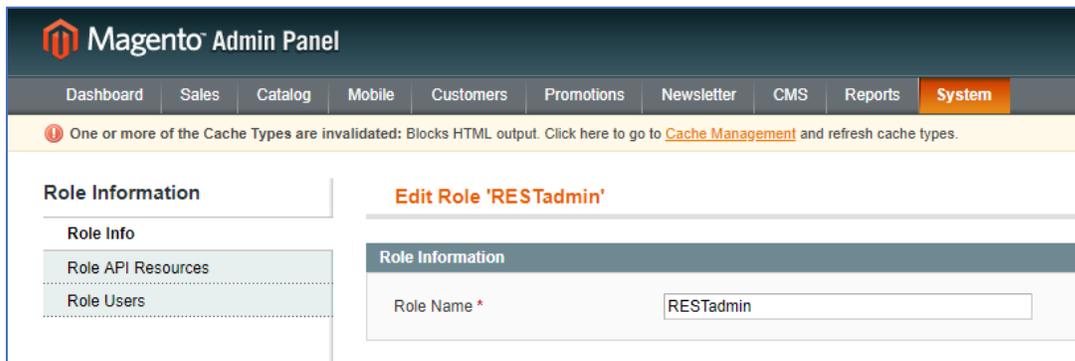
1. In the Magento admin panel, navigate to System > Web Services > REST OAuth Consumers.



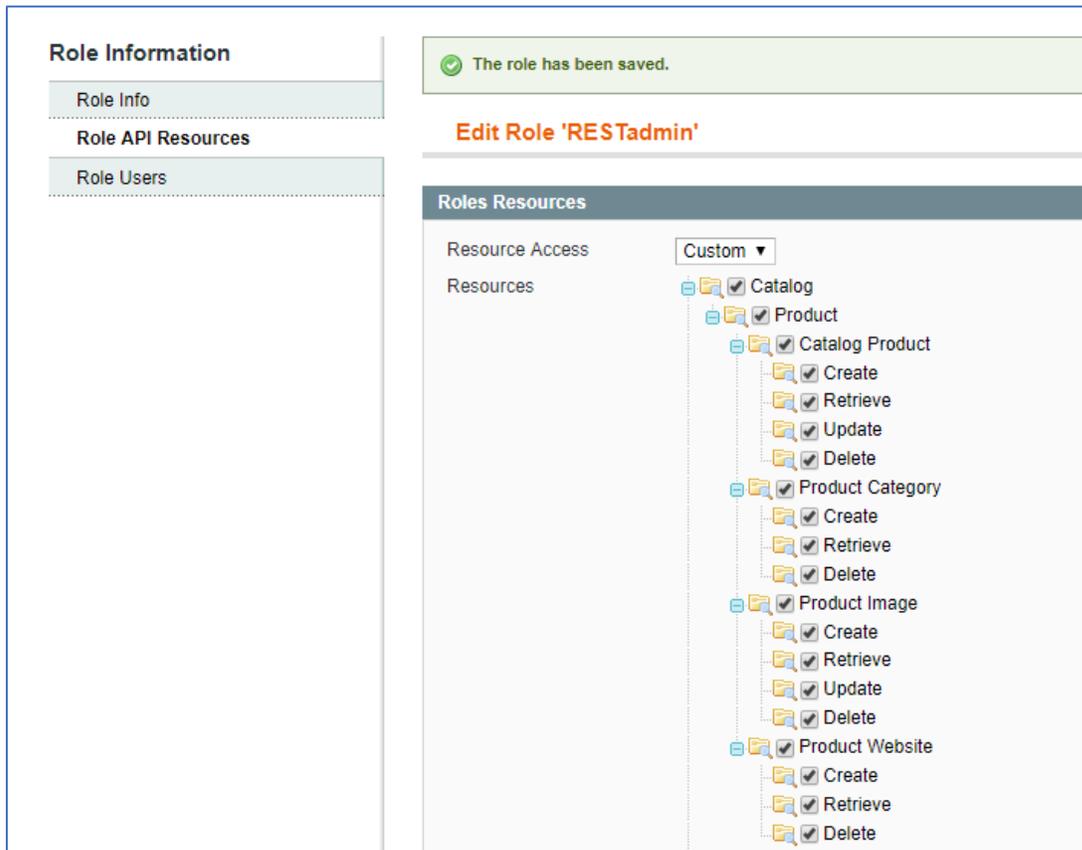
2. Click on the "Add New" button to add a new Consumer Application.
3. In the "New Consumer" screen insert a custom name.
4. The Key and Secret fields are disabled; copy their values for later usage in setting up the RPI connector's Consumer key and Consumer secret properties.
5. Set the Callback URL and save the Consumer app.



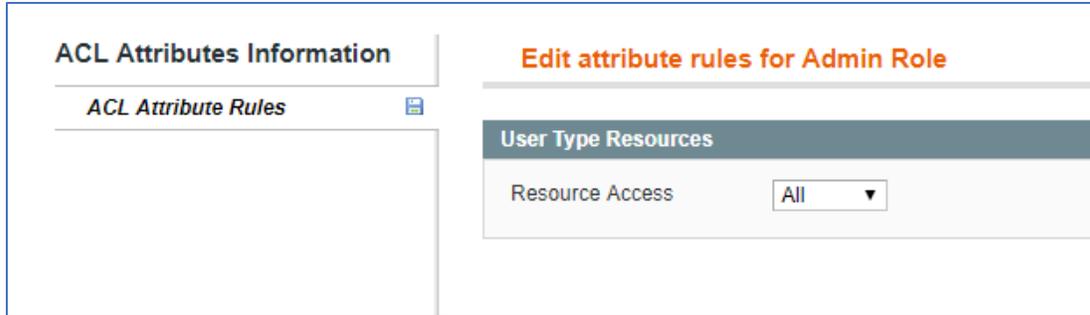
6. Navigate to System > Web Services > REST Roles.
7. Click on the "Add admin Role" button in the top right corner. The "Add new Role" screen is shown.
8. In the field "Role name" enter e.g. "RESTadmin".



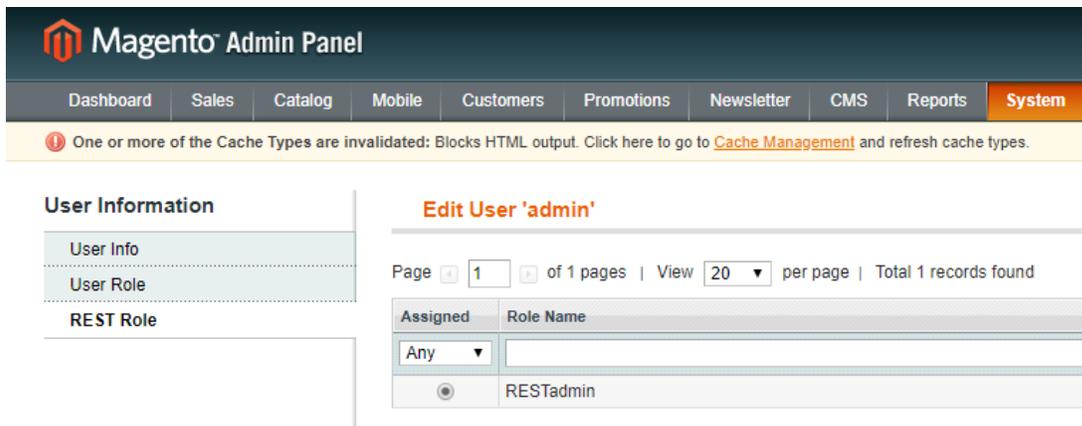
9. Click on the “Role API resources” tab on the left.
10. The “Role Resources” screen is shown. Select Custom as Resource Access and Product under Resources.
11. Click on the “Save Role” button in the top right corner of the screen.



12. Navigate to System > Web Services > REST attributes.
13. Click on “Admin” in order to configure the REST resource attributes that Admins will be allowed to access.
14. In the “User type resources” screen, select the resources that Admin users are to access, or select “All”.



15. Click the “Save” button in the top-right corner.
16. Navigate to System > Permissions > Users. The “Users” grid is shown with a list of registered Magento site Administrators.
17. Click on an admin user in the list in order to open the “Edit user” screen.
18. Locate the “REST role” tab on the left. Click it and a list of Admin roles is shown on the screen.
19. Click on the “Assigned” radio box near the role name.



20. Save the user.

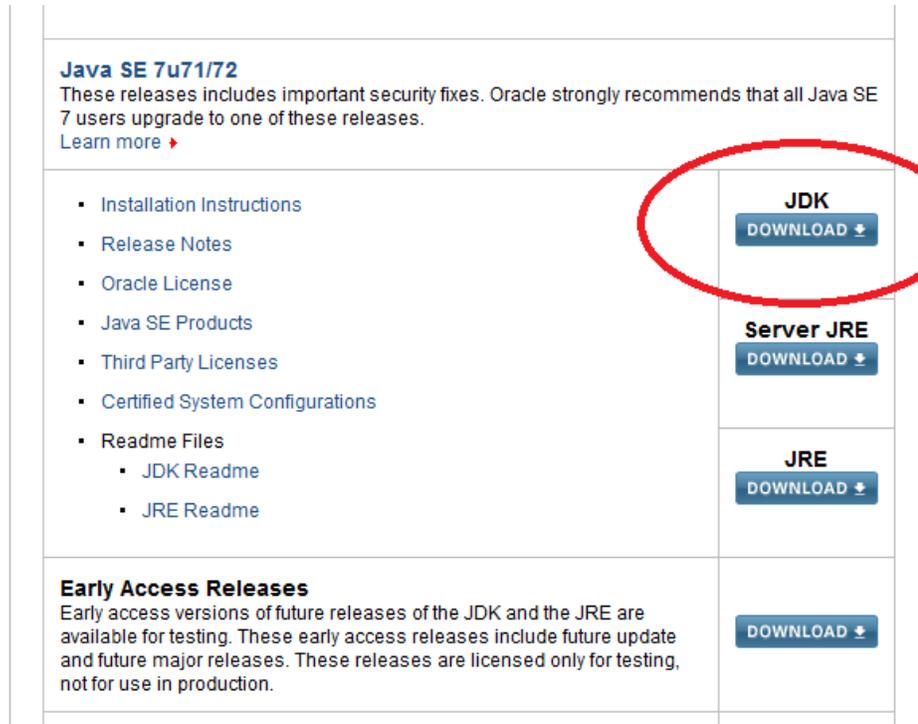
7.7 Razuna

7.7.1 Razuna Installation

This section outlines how to setup Razuna for integration with the RPI Razuna external content plugin. Please follow the steps below:

1. Install Java JDK 7 (1.7) from this location:
<http://www.oracle.com/technetwork/java/javase/downloads/index.html>.

Download the Java SE 7u71/72 JDK.



Java SE 7u71/72
These releases includes important security fixes. Oracle strongly recommends that all Java SE 7 users upgrade to one of these releases.
[Learn more](#) ▶

- [Installation Instructions](#)
- [Release Notes](#)
- [Oracle License](#)
- [Java SE Products](#)
- [Third Party Licenses](#)
- [Certified System Configurations](#)
- [Readme Files](#)
 - [JDK Readme](#)
 - [JRE Readme](#)

Early Access Releases
Early access versions of future releases of the JDK and the JRE are available for testing. These early access releases include future update and future major releases. These releases are licensed only for testing, not for use in production.

JDK
[DOWNLOAD](#) ↓

Server JRE
[DOWNLOAD](#) ↓

JRE
[DOWNLOAD](#) ↓

[DOWNLOAD](#) ↓

Choose the appropriate installer for your version of Windows.

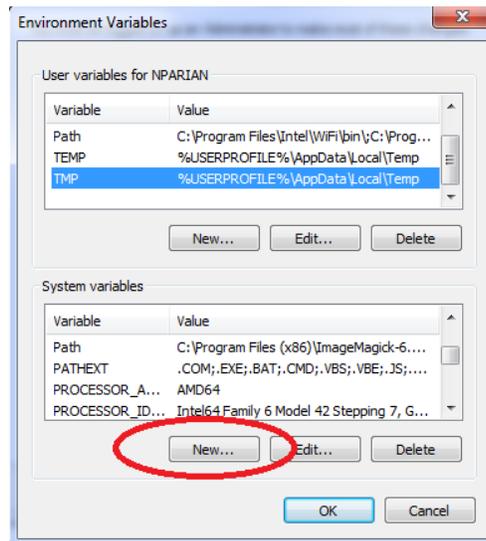
Java SE Development Kit 7u72		
You must accept the Oracle Binary Code License Agreement for Java SE to download this software.		
Thank you for accepting the Oracle Binary Code License Agreement for Java SE ; you may now download this software.		
Product / File Description	File Size	Download
Linux x86	119.43 MB	jdk-7u72-linux-i586.rpm
Linux x86	136.76 MB	jdk-7u72-linux-i586.tar.gz
Linux x64	120.83 MB	jdk-7u72-linux-x64.rpm
Linux x64	135.64 MB	jdk-7u72-linux-x64.tar.gz
Mac OS X x64	185.83 MB	jdk-7u72-macosx-x64.dmg
Solaris x86 (SVR4 package)	139.43 MB	jdk-7u72-solaris-i586.tar.Z
Solaris x86	95.49 MB	jdk-7u72-solaris-i586.tar.gz
Solaris x64 (SVR4 package)	24.58 MB	jdk-7u72-solaris-x64.tar.Z
Solaris x64	16.34 MB	jdk-7u72-solaris-x64.tar.gz
Solaris SPARC (SVR4 package)	138.61 MB	jdk-7u72-solaris-sparc.tar.Z
Solaris SPARC	98.55 MB	jdk-7u72-solaris-sparc.tar.gz
Solaris SPARC 64-bit (SVR4 package)	23.9 MB	jdk-7u72-solaris-sparcv9.tar.Z
Solaris SPARC 64-bit	18.34 MB	jdk-7u72-solaris-sparcv9.tar.gz
Windows x86	127.81 MB	jdk-7u72-windows-i586.exe
Windows x64	129.52 MB	jdk-7u72-windows-x64.exe

Additionally, you need to define system wide environment variables called JAVA_HOME and JRE_HOME. The path to Java will be (depending on your installation):

C:\Program Files\Java\jdk7.xxx (JAVA_HOME) or C:\Program Files\Java\jre7 (JRE_HOME).

It is crucial that the JAVA_HOME variable is set correctly:

- Click Start. Right click Computer and click Properties.
- In the Control Panel Window, click Advanced System Settings.
- In the System Properties Window, go to the Advanced tab and click Environment Variables.
- Click the New' button under Environment Variables.



- Add a new variable named JAVA_HOME and put Java's JDK directory in your system:

Variable name:

Variable value:

- f) Add another variable named JRE_HOME and put the JRE's directory in your system:

Variable name:

Variable value:

- Install the 32-bit version of GhostScript from: <http://downloads.ghostscript.com/public/>. Download the file: gs909w32.exe. Ghostscript is an interpreter for PostScript™ and Portable Document Format (PDF) files. It helps Razuna with handling PDF documents.
- Install ImageMagick from: <http://www.imagemagick.org/script/binary-releases.php#windows>. Make sure to use the recommended release (Win32 dynamic at 16 bits-per-pixel; filename: *ImageMagick-6.8.9-7-Q16-x86-dll.exe*). ImageMagick is required by Razuna for handling and storing image files.
- Install FFMpeg from: <http://ffmpeg.zeranoe.com/builds/>. Please install the following builds only:

Platform	URL
32-bit	http://ffmpeg.zeranoe.com/builds/win32/static/ffmpeg-20140506-git-2baf1c8-win32-static.7z
64-bit	http://ffmpeg.zeranoe.com/builds/win64/static/ffmpeg-20140506-git-2baf1c8-win64-static.7z

Extract the archive and move it to the C:\ffmpeg directory. FFMpeg is required by Razuna to handle audio and video files.

- Install the latest Exiftool from: <http://www.sno.phy.queensu.ca/~phil/exiftool/>. Once downloaded, create a folder on C: called exiftool and copy or move the downloaded executable to it. Then rename the executable to exiftool.exe (you need to rename the executable or else it will not work). Exiftool runs on all versions of Windows. Exiftool helps Razuna in writing meta information to files.
- Install UFRaw from: <http://sourceforge.net/projects/ufraw/files/ufraw/ufraw-0.19.2/ufraw-0.19.2-2-setup.exe/download>. UFRaw helps Razuna in handling and reading RAW type of image files.
- Install MP4Box from: <http://www.videohelp.com/tools/MP4Box>. Once downloaded execute the installer. Make sure to install it to the C:\MP4Box directory.
- If you have not already done so, download the latest (currently 1.7) Razuna Stand-alone release from <http://razuna.org>. We recommend to extract Razuna to the C: directory. Ensure that there are no spaces in the Razuna path. The Razuna standalone server comes with Tomcat pre-configured.

Razuna 1.7 Stand-alone Server

The Stand-alone Razuna Server can be used to deploy Razuna. It is build on the Tomcat J2EE Server. This is by far the fastest and easiest way to get Razuna up and running. It is the recommended path for new users.

[Download Razuna Stand-alone Server](#)

Razuna is available under a dual license; AGPLv3 and commercial.

Need support? [The Razuna support plans get you up and running in no time.](#)

- The download above will install Razuna with Tomcat. You must update Razuna to include patches from: <https://github.com/razuna/razuna>. Click the Download Zip file button to get Razuna with the patches.
- Extract the newly downloaded master.zip archive and copy its contents into your Razuna directory (C:\razuna_tomcat_1_6_5\tomcat\webapps\razuna; note that your directory may vary depending on your installation). Delete all the contents of the destination folder first before copying.

Name	Date modified	Type
admin	12/14/2014 8:35 AM	File folder
assets	12/14/2014 8:35 AM	File folder
bluedragon	12/14/2014 8:35 AM	File folder
doc	12/14/2014 8:35 AM	File folder
global	12/14/2014 8:35 AM	File folder
Installation	12/14/2014 8:35 AM	File folder
licenses	12/14/2014 8:35 AM	File folder
razuna-receiver	12/14/2014 8:35 AM	File folder
WEB-INF	12/14/2014 8:35 AM	File folder
.gitignore	12/14/2014 8:35 AM	GITIGNORE File
index.cfm	12/14/2014 8:35 AM	CFM File
README.TXT	12/14/2014 8:35 AM	Text Document
robots.txt	12/14/2014 8:35 AM	Text Document

11. Finally, start the application server. In order to do so, navigate to the bin directory in the Razuna folder (../tomcat/bin/) and start the server with the command: `./startup.bat`
12. Once the server has started successfully you should navigate to `http://localhost:8080/razuna` and you will be presented with the First-time Wizard to finish the setup.
13. In the First-time wizard, choose Standard Installation.

Razuna Setup Wizard
Razuna needs some information before it can be fully installed. If at any stage of the installation you need more information, check out the [online guide](#). If you get stuck, you can visit our [Razuna Customer Community](#) or with a support subscription ask us directly.

Choose Installation Type
There are two ways to install Razuna. If you are in doubt we strongly suggest using the Standard Installation Method.

Standard Installation
Install Razuna with the default settings and with the embedded database. This is by far the easiest and quickest way to get Razuna installed and running (Don't worry, if you wish you can upgrade to another type of database within the system at any stage).

Custom Installation
Perform a customized setup. Select this option if you want to configure Razuna with an external database, or restore from a backup.

14. Complete the appropriate directories for each installation. For example: for the exiftool, specify `C:\exiftool`.

Razuna Setup Wizard
 Razuna needs some information before it can be fully installed. If at any stage of the installation you need more information, check out the [online guide](#). If you get stuck, you can visit our [Razuna Customer Community](#) or with a support subscription ask us directly.

Application Paths
 Enter below the paths to required third party applications. These applications are needed by Razuna in order to process assets successfully. Note: You can also enter these paths later on in Razuna!

ImageMagick
 Enter here the absolute path to your ImageMagick installation. ImageMagick is being used by Razuna to modify your images. Most of the time ImageMagick is installed at C:\Program Files\ImageMagick (Windows) or /usr/local/bin (Unix/Linux/MacOS X). DO NOT enter a trailing slash at the end!

Executable exists. You are good to go!

FFmpeg Path
 Enter here the absolute path to your FFmpeg installation. FFmpeg is being used by Razuna to modify your videos. Most of the time FFmpeg is installed at C:\Program Files\FFmpeg (Windows) or /usr/local/bin (Unix/Linux/MacOS X). DO NOT enter a trailing slash at the end!

Executable exists. You are good to go!

Exiftool
 Enter here the absolute path to your Exiftool installation. Exiftool is being used by Razuna to read/write metadata. Most of the time Exiftool is installed at C:\Program Files\Exiftool (Windows) or /usr/local/bin (Unix/Linux/MacOS X). DO NOT enter a trailing slash at the end!

Executable exists. You are good to go!

DCRaw Path (optional)
 Enter here the absolute path to your DCRaw installation. DCRaw is being used by Razuna to convert RAW images to different formats. Installation of DCRaw is described within the Installation manual, you can grab your copy from the DVD we supplied or download the latest version from [their website](#). DO NOT enter a trailing slash at the end!

MP4Box Path (optional)
 Enter here the absolute path to the MP4Box executable. MP4Box is being used by Razuna to encode mp4 video for streaming properly. DO NOT enter a trailing slash at the end!

Executable exists. You are good to go!

15. Enter the Administrator account's details. Click Finalize Setup.

Razuna Setup Wizard
 Razuna needs some information before it can be fully installed. If at any stage of the installation you need more information, check out the [online guide](#). If you get stuck, you can visit our [Razuna Customer Community](#) or with a support subscription ask us directly.

System Administration Account
 Please enter the required information for your System Administration Account. This user is the System Administrator and has access to all settings.

Username

First Name

Last Name

eMail

Password

Confirm Password

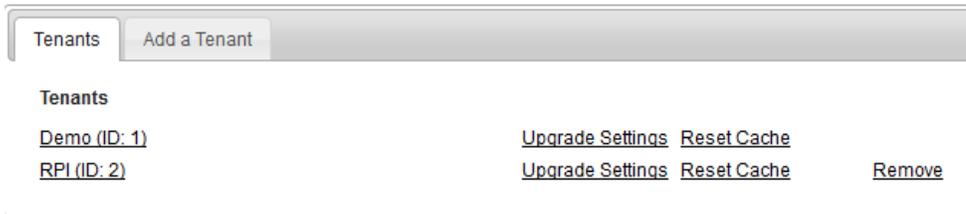
7.7.2 Setting Up a Tenant

1. Login to Razuna: <http://localhost:8080/razuna>.
2. Once logged in, you will see Razuna's menu on the left.

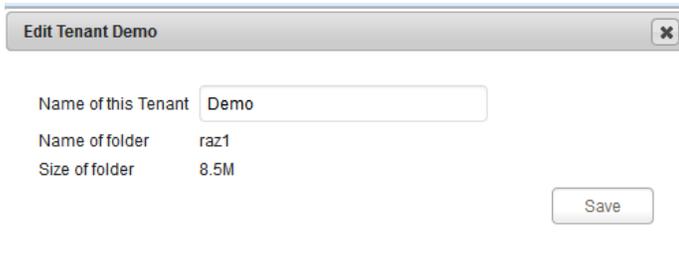


3. Click on List/add tenants.
4. On the new page, click the Add a Tenant tab. Type the name of the tenant and click Add Tenant.

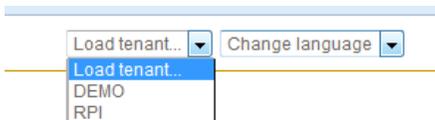
In the image below, Demo is the default tenant when installing Razuna. It has an ID of 1. RPI is a user-added tenant with an ID of 2.

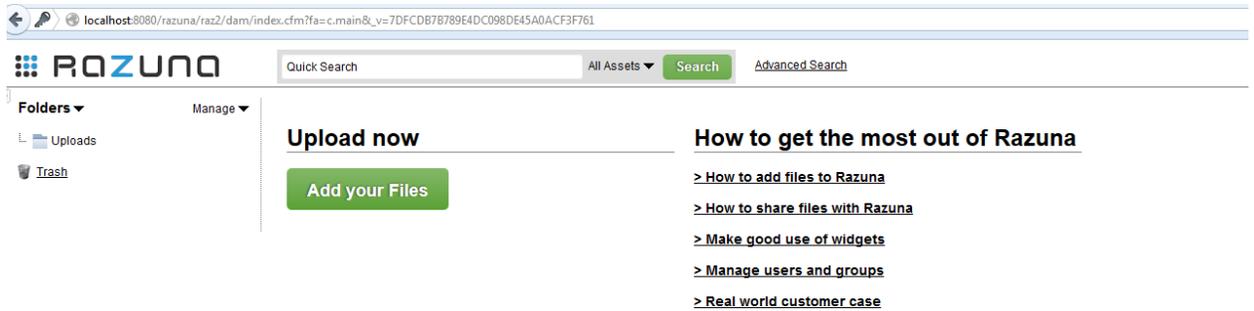


Clicking on a tenant will display the Edit Tenant window. The folder name is listed below (note that this information is required when configuring the Razuna provider at RPI).



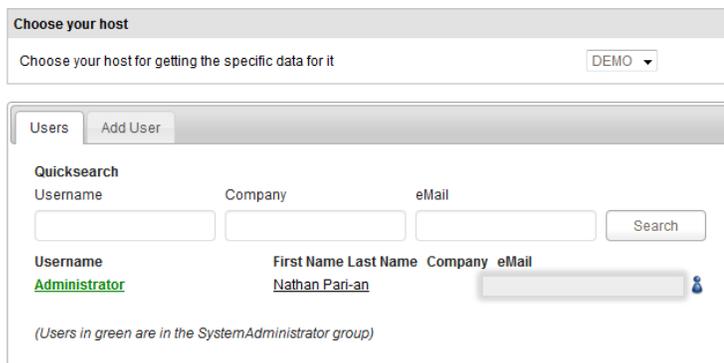
5. To load a tenant, choose it from the dropdown at the upper right. A new tab will open. You will have to log in to access the tenant.





7.7.3 Users

1. To access Users, click Users from the menu on the left. The list of users will be displayed.



The selected tenant is indicated in the Choose your host section. The users associated with the tenant are listed below.

Go to the Add User tab to create a new user.

2. Clicking on a user will display its properties window.

Nathan Pari-an [Close]

Username / eMail

User can login

eMail*

Username*

Password

Password*

Confirm Password*

User

First Name*

Last Name*

Salutation

Company

Telephone

Fax

Mobile/Cell

Expiration Date (mm/dd/yyyy)

If expiration date is set then user will not be able to login after the expiry date is reached. Leave empty to have no expiration.

Send user welcome email

Nathan Pari-an [Close]

Digital Asset Management Area

User can access Digital Asset Management Site

Administration Area

Groups Administrator SystemAdmin

Users in the group "Administrator" have Administration rights within their assigned tenants.

Only members in the group "SystemAdministrator" have access to this Razuna Administration!

Send user welcome email

Nathan Pari-an [Close]

Tenants

Demo RPI

Send user welcome email

Nathan Pari-an

Edit User Groups Tenants/Hosts API Key

Below is your API Key. With it you can use the Razuna Desktop Uploader application and the Razuna API. Please refer to the [API documentation](#). Please note, that currently we only support access by API from an account within the administrator group.

C410

In case your key has been tempered with or has become otherwise insecure [you can reset the API key](#). **NOTE: You will need to use the new API key with your application. The reset takes effect immediately!**

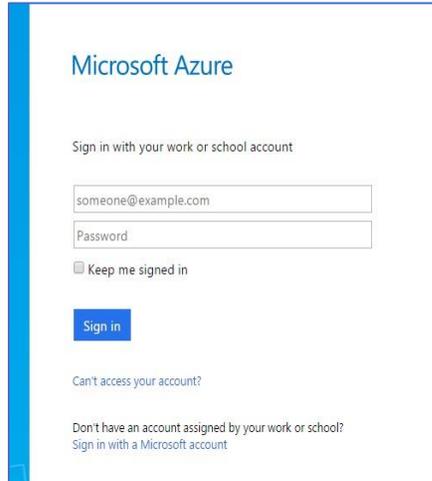
Send user welcome email

7.8 Azure Storage

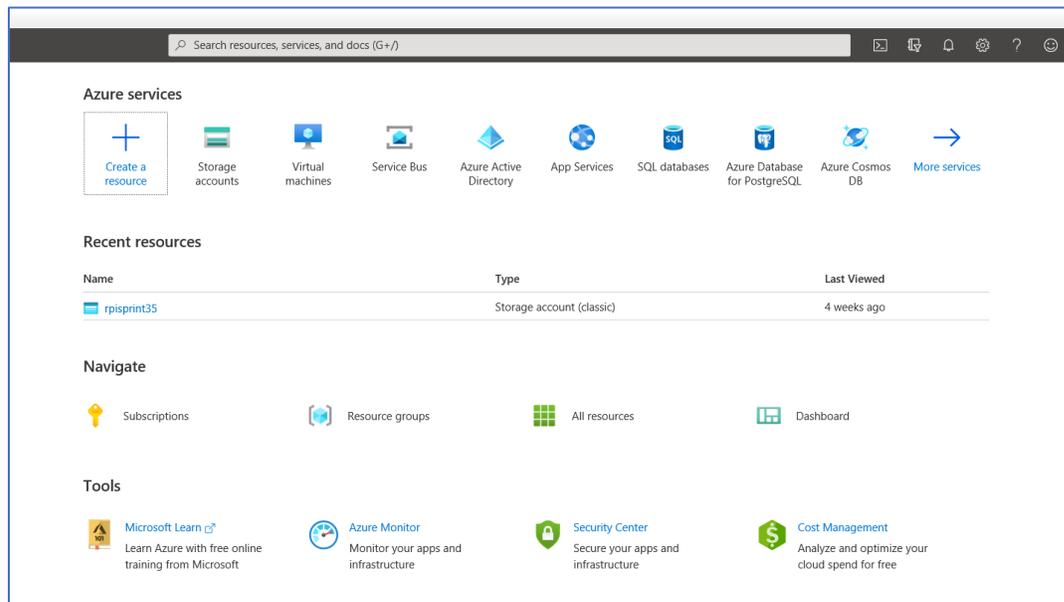
This section describes how to configure the Azure Storage Service to support an RPI external content provider.

7.8.1 Azure Account Configuration

1. In a browser, log into 'portal.azure.com'.

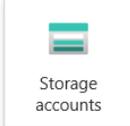


2. After logging in you will be redirected to the Azure Portal home page.



3. Click Storage accounts (classic) to view the list of storage accounts for the Azure Storage service.

Azure services



Recent resources


Storage accounts


Name

 rpsprint35

Navigate

 Subscriptions

Description

Create a storage account to store up to 500TB of data in the cloud. Use a general-purpose storage account to store object data, use a NoSQL data store, define and use queues for message processing, and set up [See more](#) ▾

Microsoft Azure Search resources, services, and docs (G+)

Home >

Storage accounts 

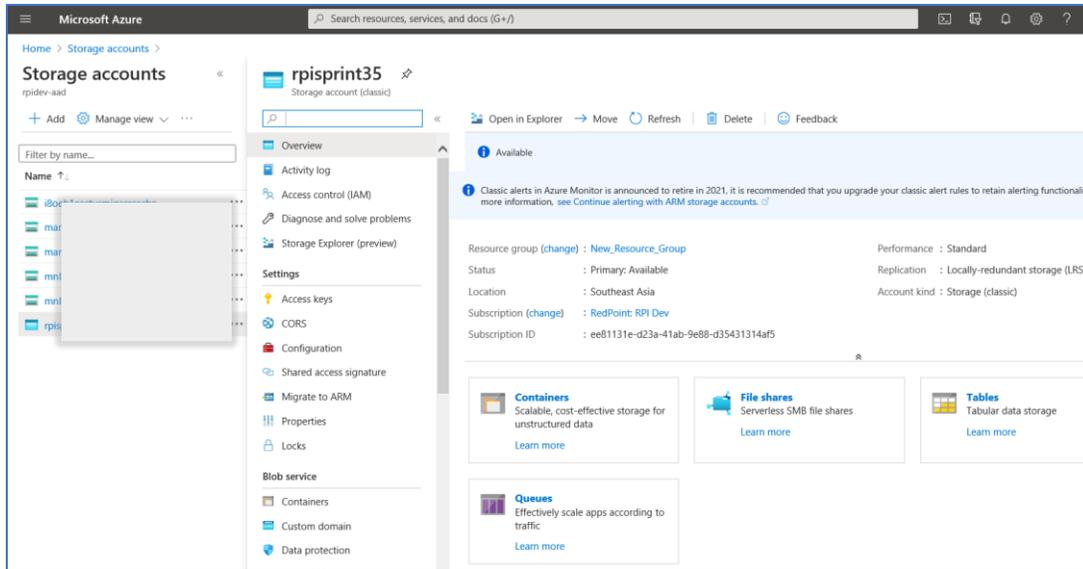
rpidev-aad

 Add
  Manage view ▾
  Refresh
  Export to CSV
  Assign tags
  Delete
  Feedback

Showing 1 to 6 of 6 records.

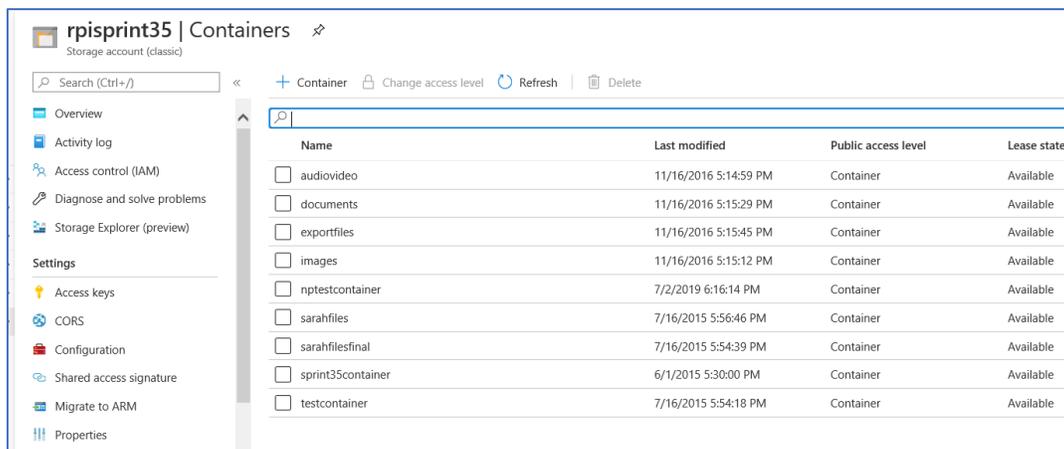
<input type="checkbox"/> Name ↑↓	Type ↑↓	Kind ↑↓	Resource group ↑↓
<input type="checkbox"/> iBoel	Storage account	Storage	MNL-maniladev
<input type="checkbox"/> man	Storage account	Storage	MNL-maniladev
<input type="checkbox"/> man	Storage account	Storage	MNL-maniladev
<input type="checkbox"/> mnlr	Storage account	Storage	MNL-maniladev
<input type="checkbox"/> mnl	Storage account	Storage	MNL-maniladev
<input type="checkbox"/> rps	Storage account (classic)		New_Resource_Group

4. Select your preferred account and view its details.



7.8.2 Adding an Azure Storage Container

1. Having clicked Containers, you can add a container and edit its privacy settings.
2. Add a Container.
3. Set its access type to Container. Note that if this setting is not changed, files will not be accessible in RPI.



New container ✕

Name *

Public access level ⓘ

⚠ All container and blob data can be read by anonymous request. Clients can enumerate blobs within the container by anonymous request, but cannot enumerate containers within the storage account.

4. Specify a name for the container and click Create.
5. Select the created container in the list and start uploading/viewing files.

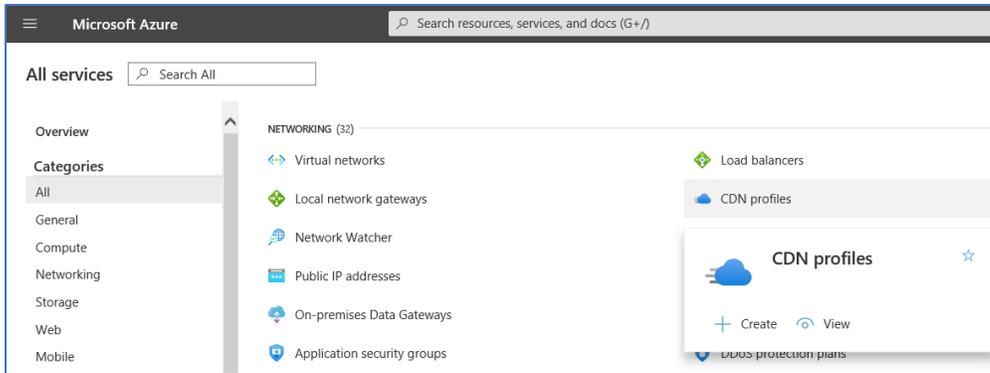
The screenshot shows the Azure portal interface for a storage container named 'testcontainer2020'. The main area displays a table of files with columns for Name, Modified, Access tier, and Blob type. The 'Upload blob' sidebar on the right shows a list of current uploads with progress indicators.

Name	Modified	Access tier	Blob type
<input type="checkbox"/> blueapple.png	6/5/2020 11:54:58 AM		Block blob
<input type="checkbox"/> Chrome.jpeg	6/5/2020 11:56:08 AM		Block blob
<input type="checkbox"/> female.jpg	6/5/2020 11:56:08 AM		Block blob
<input type="checkbox"/> male.jpeg	6/5/2020 11:56:08 AM		Block blob
<input type="checkbox"/> married.jpg	6/5/2020 11:56:08 AM		Block blob
<input type="checkbox"/> single.jpeg	6/5/2020 11:56:08 AM		Block blob
<input type="checkbox"/> wall-murals-hello-kitty.jpg.jpg	6/5/2020 11:55:21 AM		Block blob
<input type="checkbox"/> x.jpeg	6/5/2020 11:55:36 AM		Block blob

7.8.3 Azure CDN (Content Delivery Network) Configuration

1. In a browser, log into portal.azure.com
2. In the navigation panel, scroll down, and click More services > CDN Profiles, then Click Create.

The screenshot shows the 'Azure services' navigation panel in the Azure portal. It features a grid of service icons including Storage accounts, Virtual machines, Service Bus, Azure Active Directory, App Services, SQL databases, Azure Database for PostgreSQL, and Azure Cosmos DB. A 'More services' button is highlighted with a blue border.

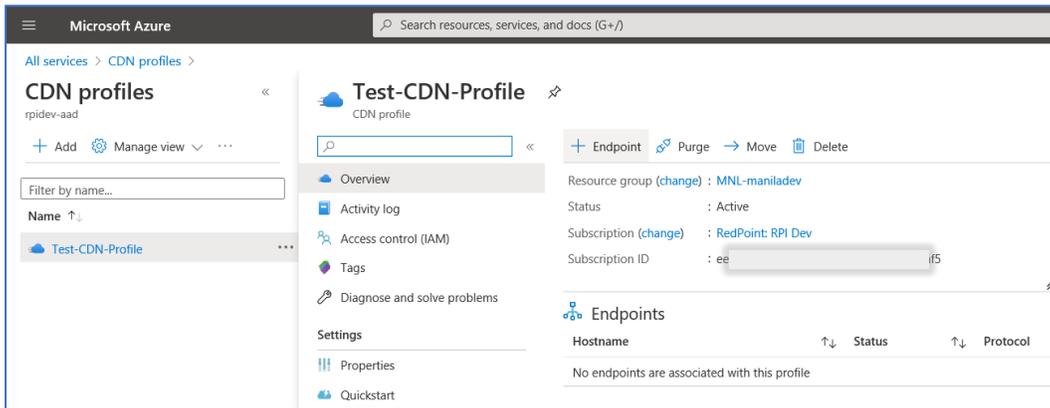


- To create a new CDN profile, complete the form's required details and click Create.

- Refresh the list of CDN profiles. Once your new profile is available, select it.

Name	Pricing tier	Resource ID	Subscription	Subscription ID	Resource group
Test-CDN-Profile	Standard Akamai	/subscriptions/ee81131e-d23a-4...	RedPoint: RPI Dev	ee81131e-d23a-4...	ee81131e-d23a-4...

- To add an Endpoint, click + Endpoint



- Complete the form and click Add.

Add an endpoint

Allows configuring content delivery behavior and access.

Name *
testcdn2020
.azureedge.net

Origin type *
Storage

Origin hostname * ⓘ
rprisprint35.blob.core.windows.net

Origin path ⓘ
/Path

Origin host header ⓘ
rprisprint35.blob.core.windows.net ✓

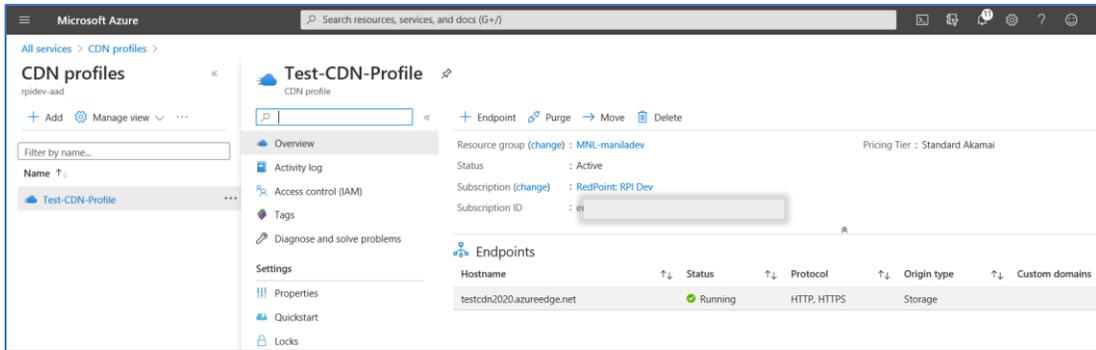
Protocol ⓘ **Origin port** ⓘ

HTTP 80

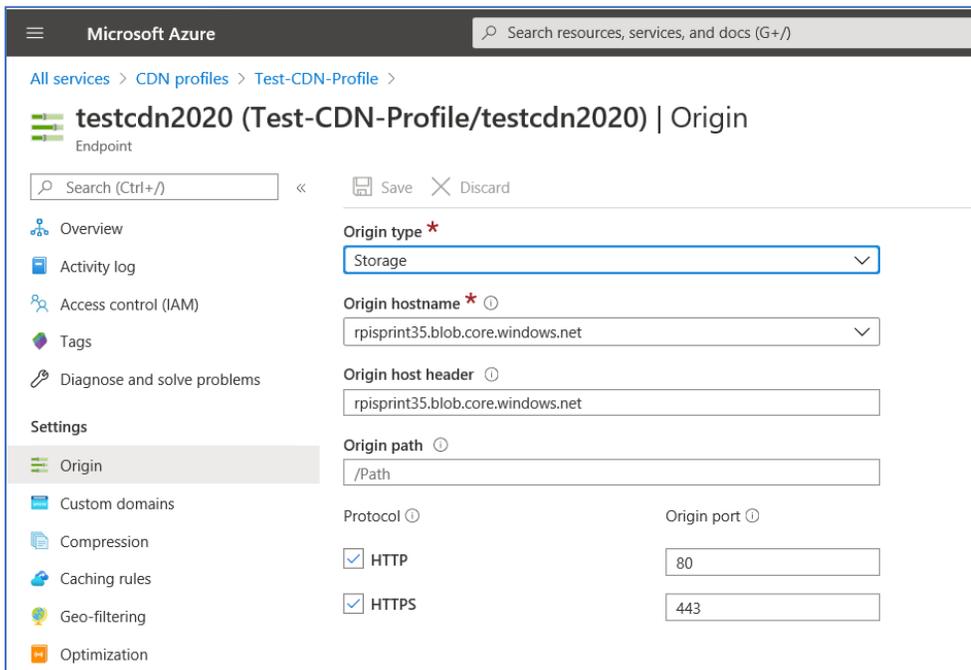
HTTPS 443

Optimized for ⓘ
General web delivery

- Wait while the CDN endpoint is created. Refresh the list of CDN profiles to view the newly-created endpoint.



8. Select the endpoint and scroll down to Origin.

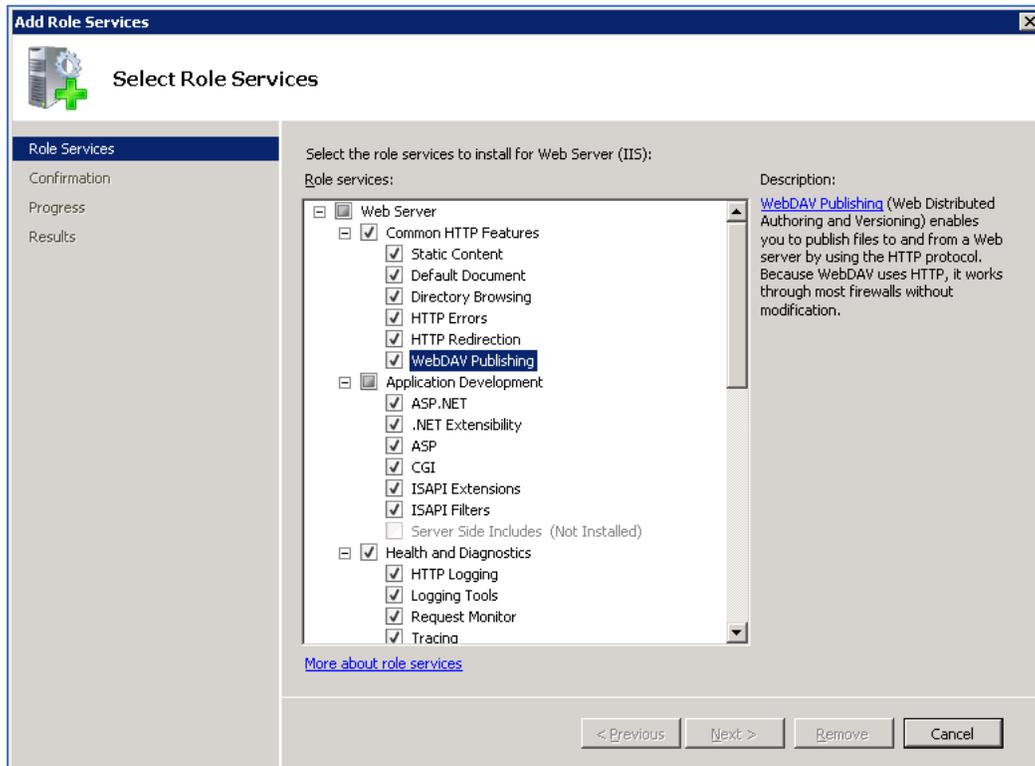


9. Use the Origin hostname to configure the Azure Storage provider's Blob service endpoint property.

7.9 WebDAV

7.9.1 Installing WebDAV

1. On the taskbar, click Start, point to Administrative Tools, and then click Server Manager.
2. In the Server Manager hierarchy pane, expand Roles, and then click Web Server (IIS).
3. In the Web Server (IIS) pane, scroll to the Role Services section, and then click Add Role Services.
4. On the Select Role Services page of the Add Role Services Wizard, expand Common HTTP Features, select WebDAV Publishing, and then click Next.

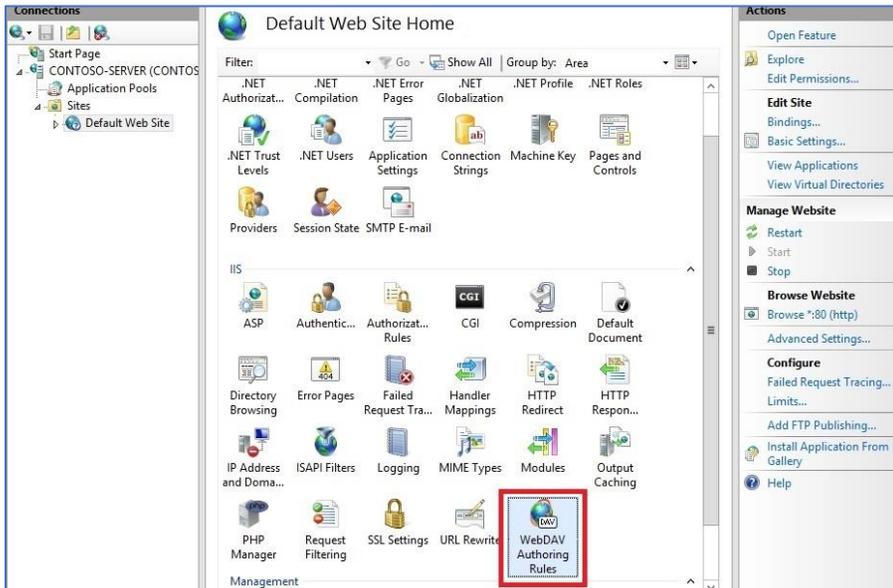


5. On the Confirm Installation Selections page, click Install.
6. On the Results page, click Close.

7.9.2 Enabling and adding an authoring rule in WebDAV

1. In IIS Manager, in the Connections pane, expand the Sites node in the tree, then click the Default Web Site.

- As shown in the image below, double-click the WebDAV Authoring Rules feature.



- When the WebDAV Authoring Rules page is displayed, click the Enable WebDAV task in the Actions page.



- Once WebDAV has been enabled, click the Add Authoring Rule task in the Actions pane.



- When the Add Authoring Rule dialog appears:
 - Click All content to specify that the rule applies to all content types.
 - Choose Specified users and type "administrator" for the user name.
 - Select Read, Source, and Write for the permissions.
 - When you have completed these items, click OK.

Add Authoring Rule

Allow access to:

All content

Specified content:

Example: *.bas, wsvc.axd

Allow access to this content to:

All users

Specified roles or user groups:

Admin, Guest

Specified users:

User1, User2

Permissions

Read

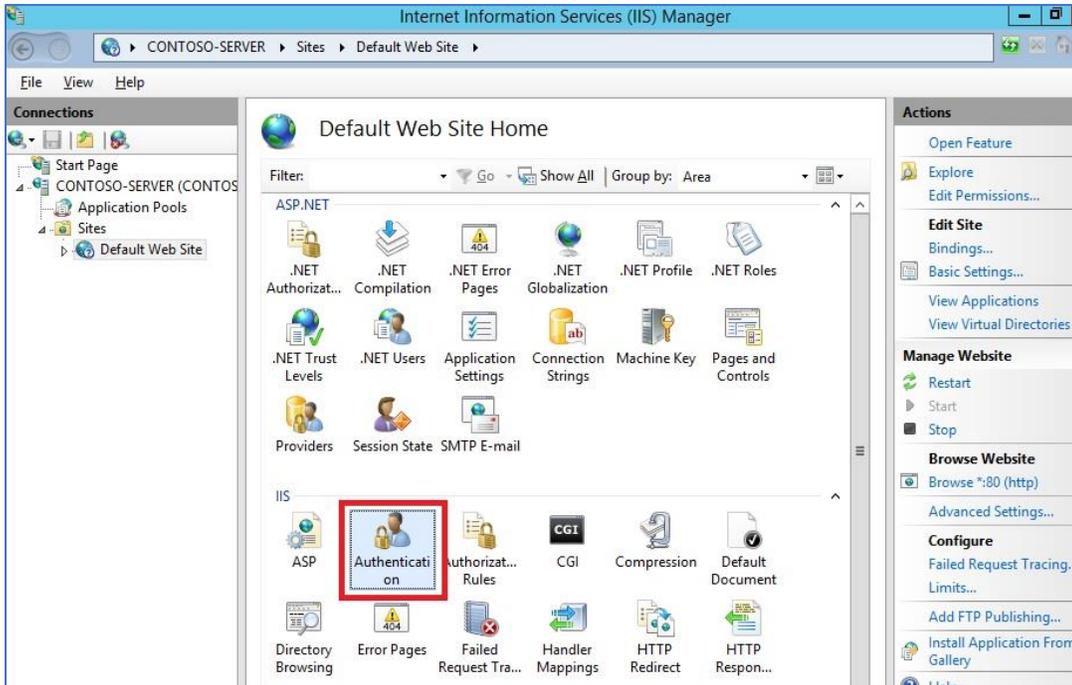
Source

Write

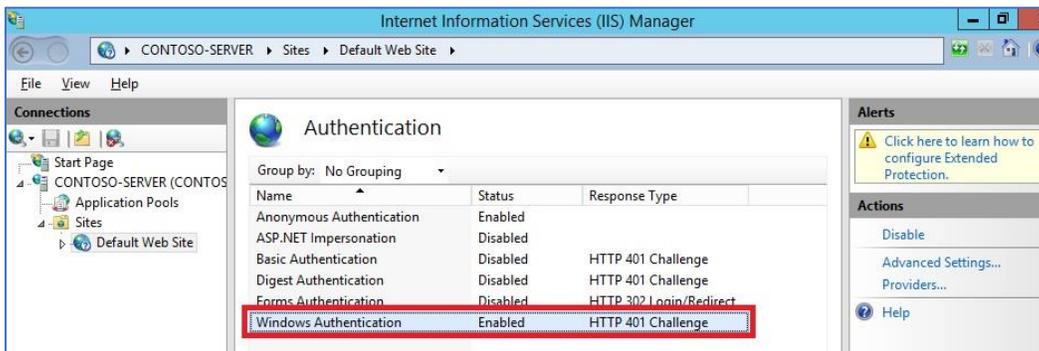
OK Cancel

7.9.3 Logging into the WebDAV site

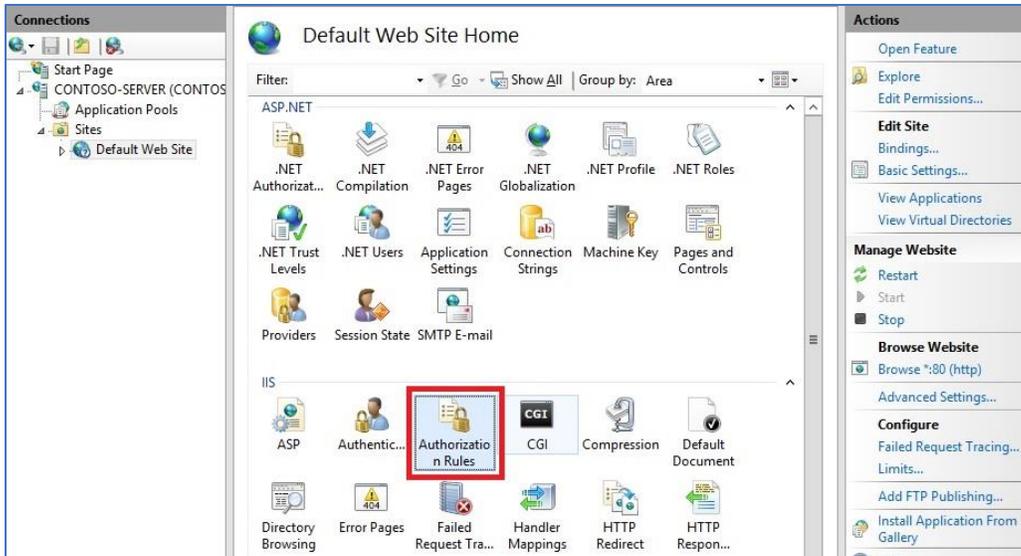
1. In IIS Manager, in the Connections pane, expand the Sites node in the tree, then click the Default Web Site.
2. Double-click the Authentication feature.



3. When the Authentication feature opens, make sure that Windows Authentication is enabled. If it is not enabled, select Windows Authentication, and click Enable in the Action menu. (Note: You can use Basic Authentication with WebDAV, but the WebDAV redirector will only use Basic authentication with SSL connections.)



4. In IIS Manager, click the Default Web Site under the Sites node in the tree.



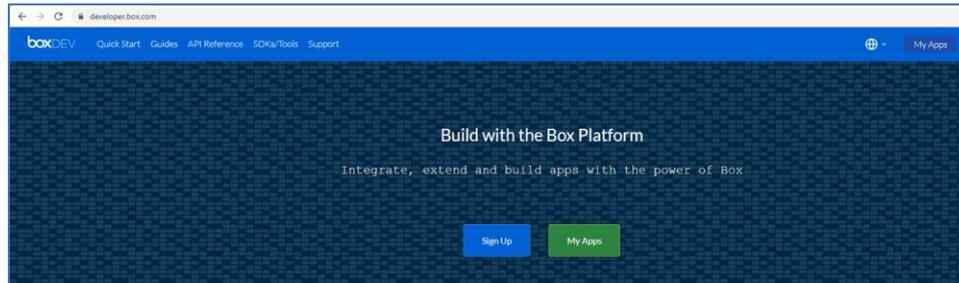
5. When the Authorization feature opens, make sure that an Allow rule is defined that includes the administrator account. (For example, the default rule for IIS allowing access to All Users will include the administrator account.)
6. On your WebDAV server, open a command prompt session.
7. Type the following command to connect to your WebDAV server: net use * <http://localhost/>



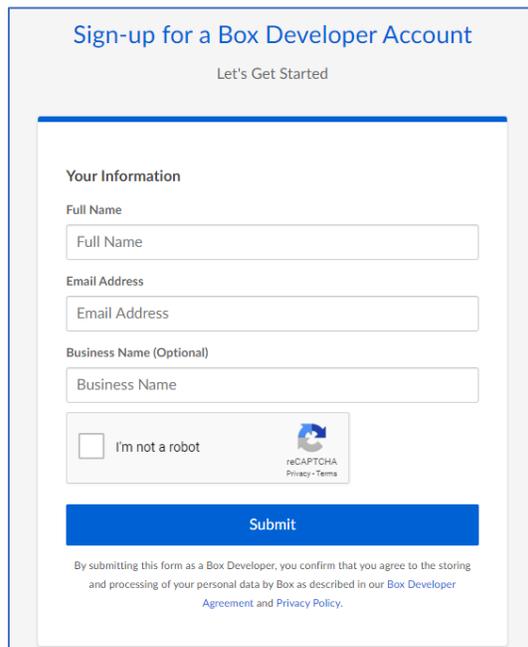
7.10 Box

This section describes how to configure Box for use as an RPI external content provider.

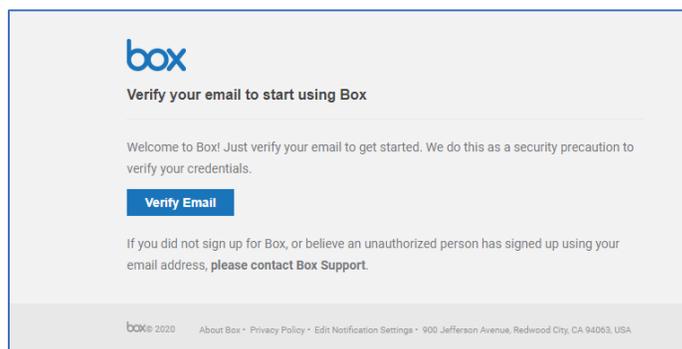
1. In a web browser, log into the Box developer site (<https://developer.box.com/>), using the “Log in” link. If you do not have an account, please create one by clicking “the Sign Up” link (proceed to the “Creating an Account” section below).



2. Enter your Full Name and Email Address to sign up.

A screenshot of the 'Sign-up for a Box Developer Account' form. The page title is 'Sign-up for a Box Developer Account' with the subtitle 'Let's Get Started'. The form is titled 'Your Information' and contains the following fields: 'Full Name', 'Email Address', and 'Business Name (Optional)'. Below these fields is a reCAPTCHA widget with the text 'I'm not a robot' and a 'Submit' button. At the bottom, there is a disclaimer: 'By submitting this form as a Box Developer, you confirm that you agree to the storing and processing of your personal data by Box as described in our Box Developer Agreement and Privacy Policy.'

3. Click on the Confirmation Email sent to your email address and set your Password.





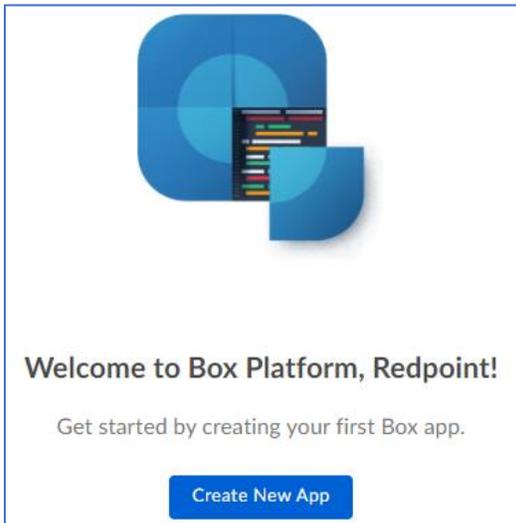
Enter your new password
 Before you can access your account (redpointuser2020@gmail.com), you need to create a new password.

Log out of all Box applications using this account.

Update

Not redpointuser2020@gmail.com? Log out.

- Click the Create New App button.



- Select Custom App then click Next.

CREATE A NEW BOX APP

Let's get started. What type of app are you building?



Custom App

Build a standalone app with Box's content services, such as managing and rendering files and enabling end-user collaboration.

For developers using Box's content services without requiring Box user accounts.



Enterprise Integration

Extend your Box instance with programmatic processes and backend integrations, such as user, group, and event management.

For Box admins and developers building an integration for their existing Box users.



Partner Integration

Allow users to access, edit, and save their Box content within your third-party app, such as an e-signature or project management service.

For developers building an integration for existing Box users.



Custom Skill

Build a Custom Skill that processes files in Box using third-party AI/ML technologies. Custom Skills apply metadata to files, such as image labels or audio transcripts.

For developers building content processing solutions.

6. Select Standard OAuth 2.0 then click Next.

CREATE A NEW BOX APP

Authentication Method

We've recommended an authentication method based on the type of app you've chosen.
You may change the authentication method below. [Learn more.](#)

RECOMMENDED FOR CUSTOM APP:

OAuth 2.0 with JWT (Server Authentication)
Allows your app to authenticate directly to Box using a digitally signed JSON Web Token instead of user credentials. For use with Service Accounts and App Users.

OTHER AVAILABLE AUTHENTICATION METHODS:

App Token (Server Authentication)
Provides API functionality scoped to previewing content in your application. This will NOT allow you to create and manage users in Box. Please read our documentation on [New Box View](#) and make sure that it fits your application's requirements before proceeding.

Standard OAuth 2.0 (User Authentication)
Requires Box users to log in with a username and password to authorize your app to access content in their account.

7. Enter your application name then click Create App.

CREATE A NEW BOX APP

What would you like to name your app?

Don't worry—you can change this later.

By clicking 'Create App', you agree to the terms of the [Box Developer Agreement](#) and the [Box Privacy Policy](#).



Woot! Your app has been created.

Make your first API call and retrieve a list of folders from your personal Box account using a developer token. This token will expire after 60 minutes.

```
curl https://api.box.com/2.0/folders/0 -H \
  "Authorization: Bearer Jk1x [redacted]"
```

8. Click the View Your App button to get the created credentials.

The screenshot shows the 'Configuration' page in the Box Developers portal. The page is titled 'Configuration' and includes a sub-header: 'Configure the authentication and permissions for your app to begin using the Box APIs. Check out our [Getting Started Guide](#) for a walkthrough of these settings.'

Authentication Method
Choose how your app will authenticate to the Box APIs. [Learn more.](#)

- Standard OAuth 2.0 (User Authentication)**
Requires Box users to log in with a username and password to authorize your app to access content in their account.
- OAuth 2.0 with JWT (Server Authentication)**
Allows your app to authenticate directly to Box using a digitally signed JSON Web Token instead of user credentials. For use with Service Accounts and App Users.

Developer Token
A developer token allows you to use the Box API to access your personal Box account only. This token is valid for 60 minutes.

Developer Token
[Token value] [COPY](#)
[Revoke]
Created: May 10, 2020 at 10:16:22 PM PDT
Expires: May 10, 2020 at 11:22:58 PM PDT

OAuth 2.0 Credentials
Credentials for using OAuth 2.0 as your Authentication type.

Client ID
[Client ID value] [COPY](#)

Client Secret
[Client Secret value] [COPY](#)
[Reset]

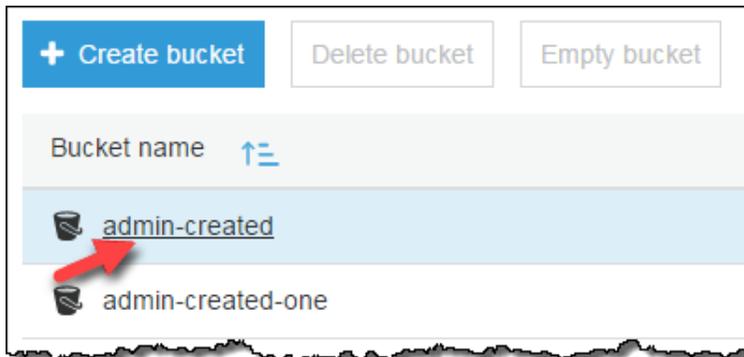
7.11 Amazon AWS S3

Follow the steps below to enable KMS encryption at an S3 bucket.

7.11.1 Enable Default Encryption for an S3 Bucket

This section describes how to enable encryption for AWS S3-KMS. Please follow the steps below:

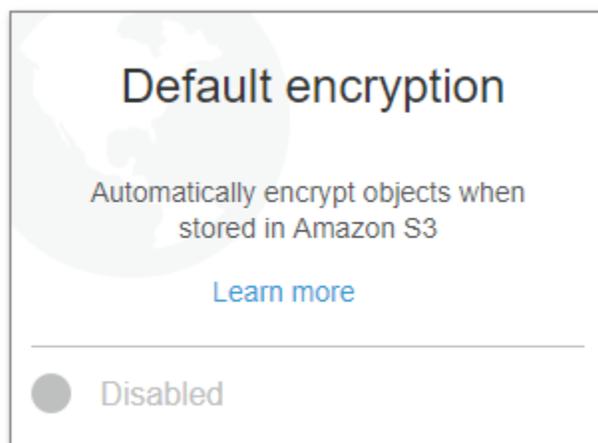
1. Sign into the AWS Management Console and open the Amazon S3 console at <https://console.aws.amazon.com/s3/>.
2. In the Bucket name list, choose the name of the bucket that you want.



3. Show **Properties**.



4. Choose **Default encryption**.



5. Choose AWS-KMS, and then choose a master key from the list of the AWS KMS master keys that you have created. AES-256 is not supported in this context.

6. Type the Amazon Resource Name (ARN) of the AWS KMS key to use. You can find the ARN for your AWS KMS key in the IAM console, under Encryption keys, or you can choose a key name from the dropdown list.

Default encryption

This property does not affect existing objects in your bucket.

None

AES-256
Use Server-Side Encryption with Amazon S3-Managed Keys (SSE-S3)

AWS-KMS
Use Server-Side Encryption with AWS KMS-Managed Keys (SSE-KMS)

Custom KMS ARN

Type to search

aws/s3

ca-key

Custom KMS ARN

View bucket policy

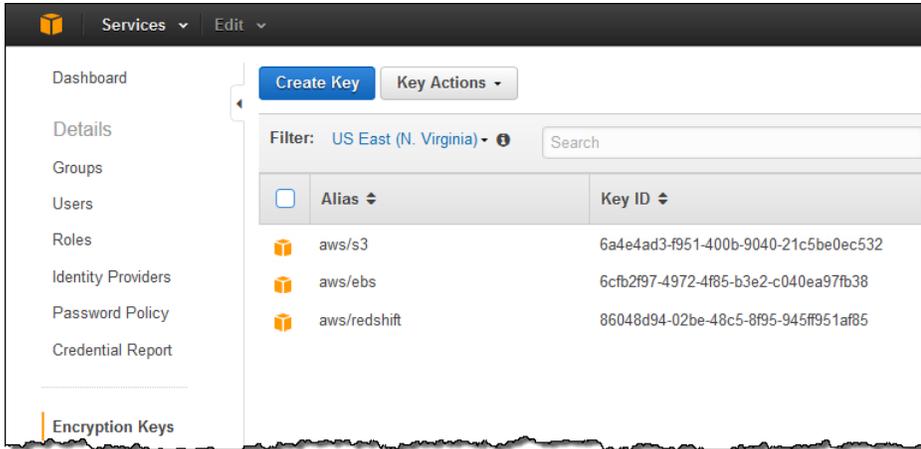
Cancel Save

7. Press Save.

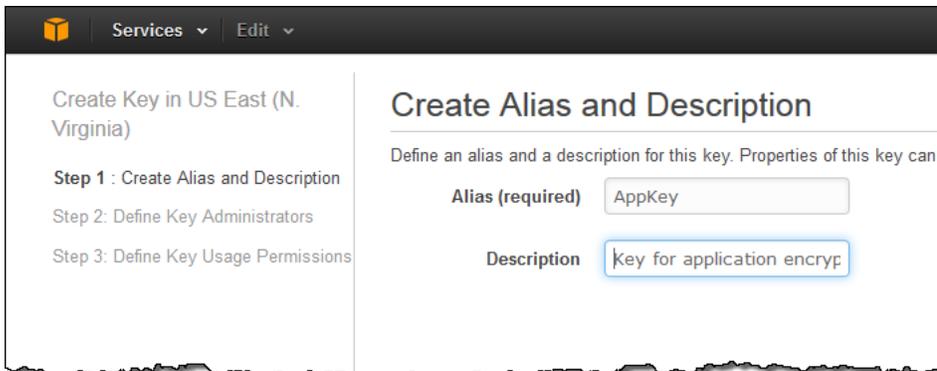
7.11.2 Create Master key for AWS-KMS

This section describes how to create an AWS-KMS master key. Please follow the steps below:

1. Open the IAM console at <https://console.aws.amazon.com/iam/>.
2. In the navigation pane, click **Encryption keys**.
3. Click **Create Key**.

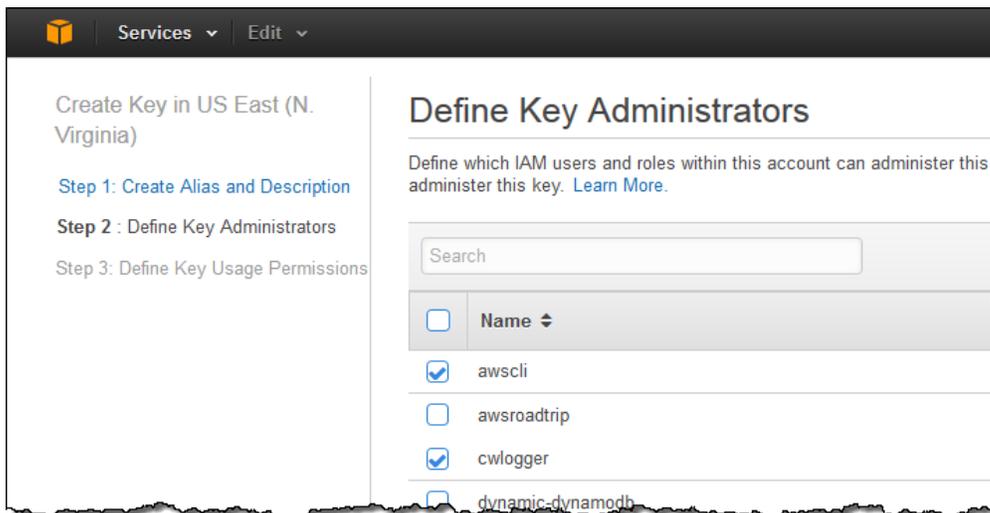


4. Complete the app key and description fields then press **Next step**.

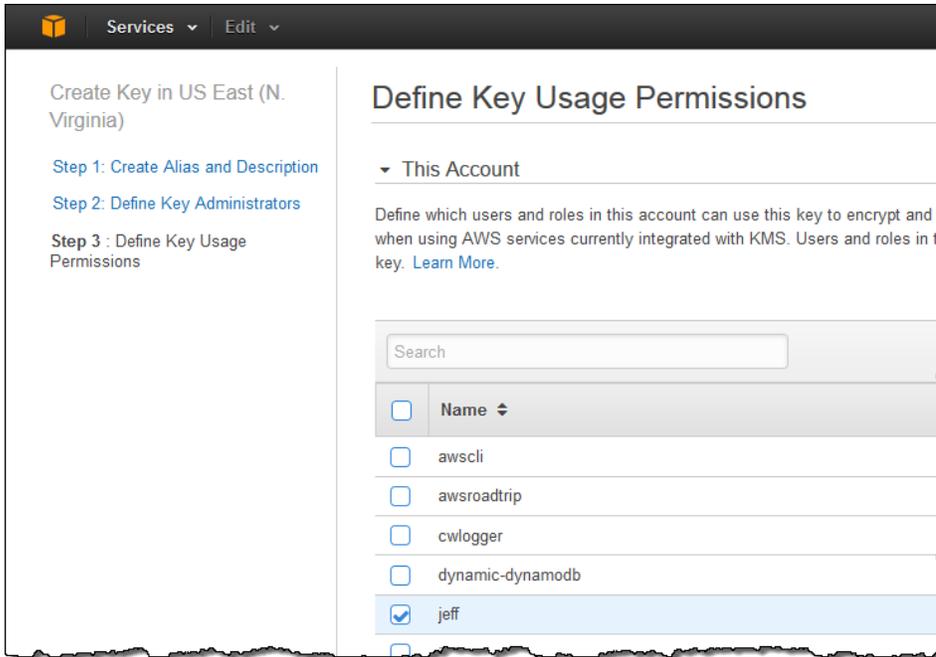


5. Check the users and

roles who can administer the master key. Press **Next step** when done.



6. Select users and roles who can encrypt and decrypt data when using AWS services.



7.

8. Press **Finish** to save the encryption key.

7.12 Google Cloud Storage

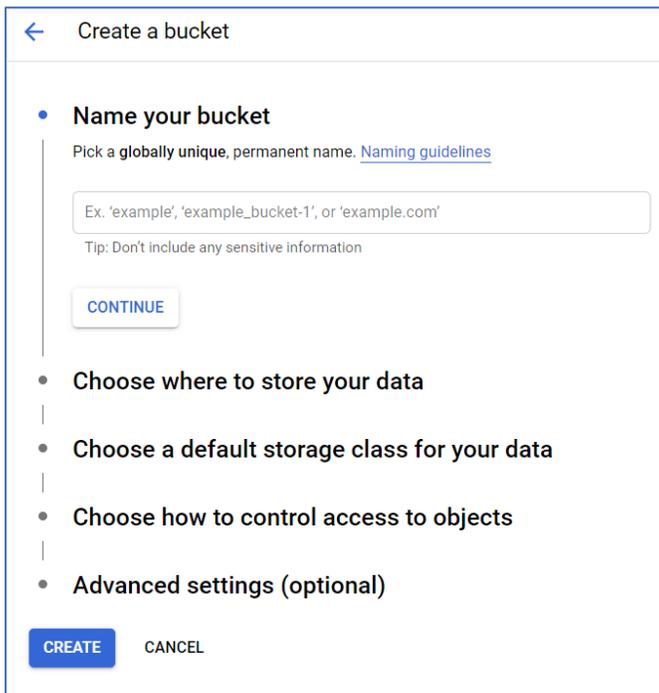
7.12.1 Create Google Cloud Storage Bucket

This section describes how to create and configure a new Google Cloud Storage Bucket. Please follow the steps below:

1. Open a web browser and navigate to <https://console.cloud.google.com> to logon to the Google Cloud Console.
2. From the left side menu, under the Storage section, click **Storage > Browser**.
3. On the Browser page, click **Create Bucket**.



4. Create your bucket by entering the required fields in the Create Bucket step-by-step process.

A screenshot of the 'Create a bucket' wizard in the Google Cloud Console. The wizard is titled 'Create a bucket' and has a back arrow on the left. It consists of several steps:

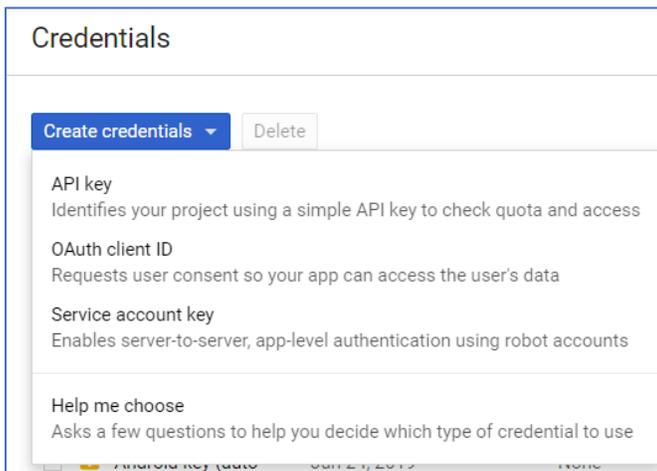
- Name your bucket**: This step is currently active. It asks the user to 'Pick a globally unique, permanent name. [Naming guidelines](#)'. Below this is a text input field with placeholder text: 'Ex. 'example', 'example_bucket-1', or 'example.com''. A tip below the field says 'Tip: Don't include any sensitive information'. A 'CONTINUE' button is located below the input field.
- Choose where to store your data**
- Choose a default storage class for your data**
- Choose how to control access to objects**
- Advanced settings (optional)**

At the bottom of the wizard, there are two buttons: 'CREATE' (highlighted in blue) and 'CANCEL'.

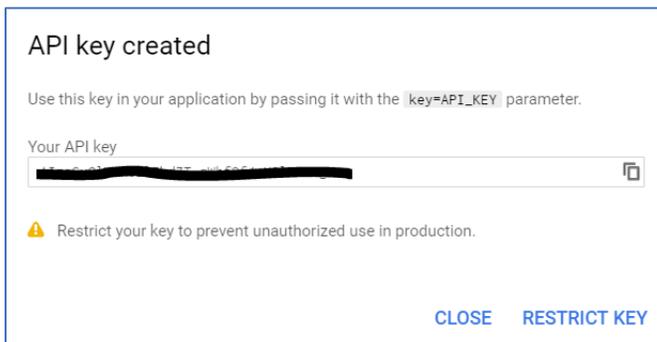
7.12.2 Create API Credentials

5. From the Menu on the left, click **APIs and Services > Credentials**

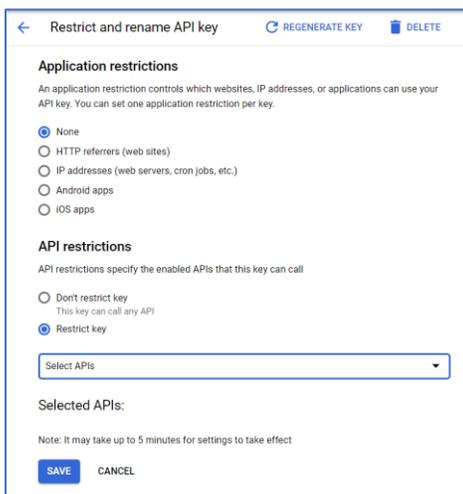
6. Click the **Create Credentials** button on the Credentials page and select **API key** from the drop-down menu.



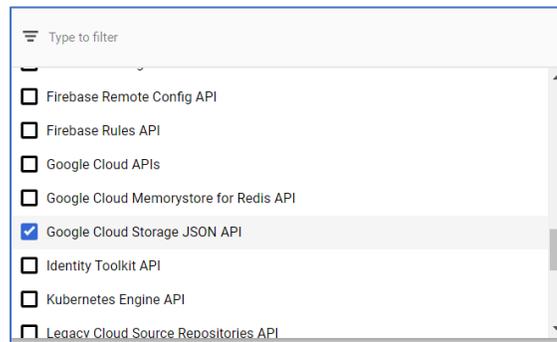
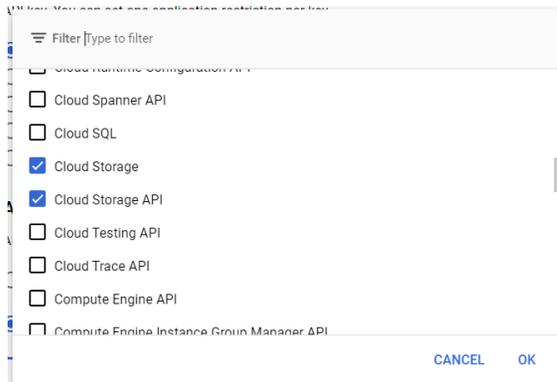
7. The API key will be used within the configuration of the Google Cloud Storage ECP. After the API key is created and displayed, click **Restrict Key**.



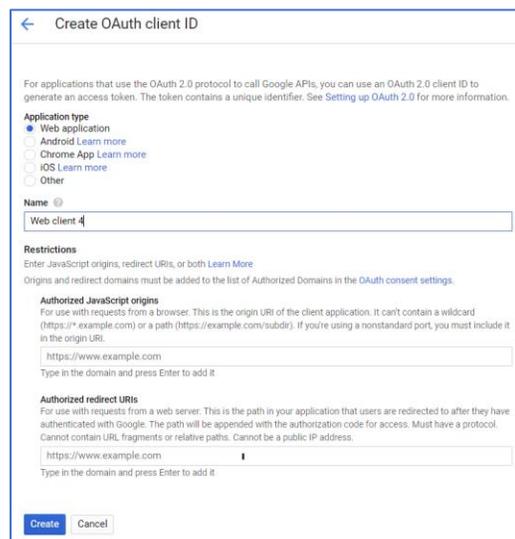
8. Set the API key's Application restrictions and API restrictions.



Note: If an application restriction is configured, HTTP referrers is required for RPI to connect to Google Cloud Storage. For API restriction, make sure Cloud Storage, Cloud Storage API, and Google Cloud Storage JSON API restrictions are checked.



9. Create your OAuth client ID. Click the Create Credentials button on the Credentials page. Select OAuth client ID from the drop-down menu.
10. On the Create OAuth client ID page, select Web application as the application type. Provide a name to your ID and set an authorized redirect URI. Make sure that the redirect URI has been added to the Authorized Domains list. This can be configured in the OAuth consent settings page.



11. Click the Create button to finish the step. The Client ID, Client Secret, and Redirect URI will be used within the configuration of the Google Cloud Storage ECP.

7.12.3 Set the IAM Permissions

12. Set the IAM permissions for Cloud Storage. From the main menu, navigate to **IAM & Admin > Roles**. Click **Create Role**.

The screenshot shows the Google Cloud Platform IAM & Admin console. The top navigation bar includes the Google Cloud Platform logo, the user profile 'RPIDev', and a search bar. The left sidebar lists various IAM & Admin services, with 'Roles' selected. The main content area is titled 'Create Role' and contains the following fields:

- Title ***: Custom Role (11 / 100 characters)
- Description**: Created on: 2021-10-28 (22 / 256 characters)
- ID ***: CustomRole604
- Role launch stage**: Alpha (dropdown menu)

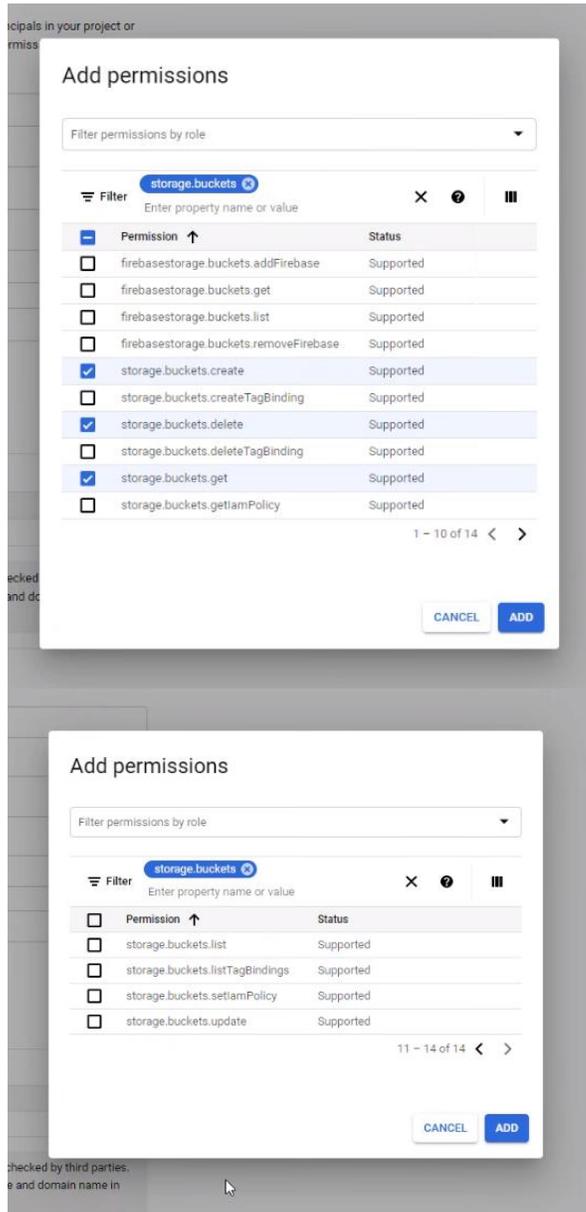
Below the fields is a blue button labeled '+ ADD PERMISSIONS'. Underneath, there is a section titled 'No assigned permissions' with a filter input field and a table with columns 'Permission' and 'Status'. A message below the table states: 'Some permissions might be associated with and checked by third parties. These permissions contain the third party's service and domain name in the permission prefix.' At the bottom of the form are 'CREATE' and 'CANCEL' buttons.

13. Set the Title and ID of the role.
14. Click the **Add Permissions** button.

15. In the Permissions dialog, filter for 'storage.buckets'. Check off of the following permissions:

- storage.buckets.create
- storage.buckets.delete
- storage.buckets.get
- storage.buckets.list

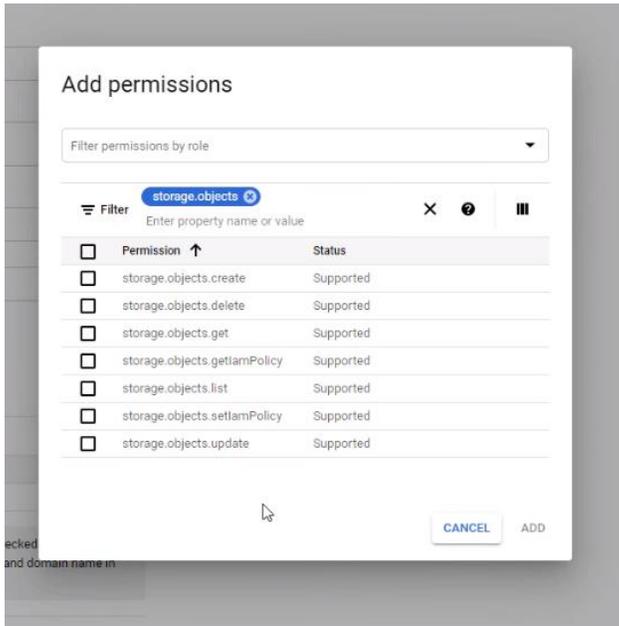
Click the Add button



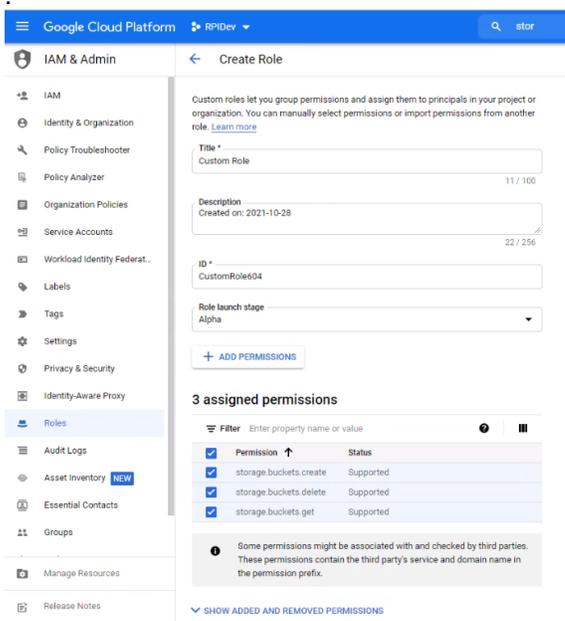
16. Filter for 'storage.objects'. Check off the following permissions:

- storage.objects.create
- storage.objects.get
- storage.objects.list
- storage.objects.delete

Click the Add button



17. The role should now list the selected permissions from above. If incomplete, click the Add Permissions button again to reselect the missing permissions.



18. From the menu on the left, click **IAM**. Assign the created role to the user that will be using Google Cloud Storage.

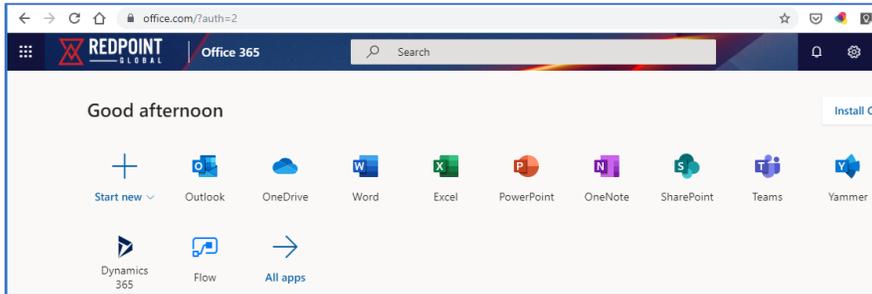
The screenshot shows the Google Cloud IAM & Admin console. On the left, a navigation menu includes 'IAM & Admin', 'IAM', 'Identity & Organization', 'Policy Troubleshooter', 'Policy Analyzer', 'Organization Policies', and 'Service Accounts'. The 'IAM' section is selected. The main area is titled 'IAM' and has 'ADD' and 'REMOVE' buttons. Below this, there are two tabs: 'PERMISSIONS' (selected) and 'RECOMMENDATIONS HISTORY'. A table lists the permissions for the user 'nathan.pari-an@redpointglobal.com' (Nathan Pari-an). The table has columns for the role name and the number of excess permissions. The roles listed are Storage Admin, Bucket-Nathan, Custom API, Custom Client Auth, Firebase Admin, Service Account User, and Viewer.

Role	Excess Permissions
Storage Admin	24/24 excess permissions
Bucket-Nathan	2/4 excess permissions
Custom API	9/19 excess permissions
Custom Client Auth	3/21 excess permissions
Firebase Admin	332/355 excess permissions
Service Account User	3/5 excess permissions
Viewer	

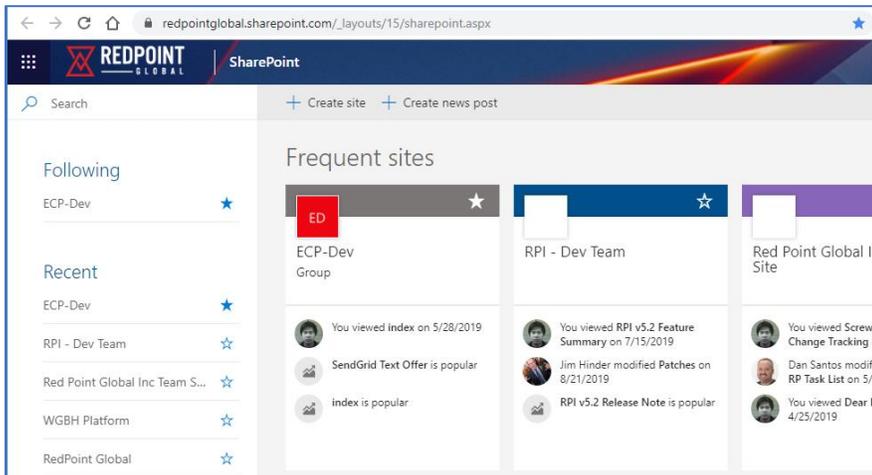
7.13 SharePoint Online

This section describes how to configure an existing SharePoint Online instance for use with RPI. If you have a provisioned SharePoint Online and have access to it, please follow the steps below:

1. In a web browser, log into <https://www.office.com/> to acquire a server URL and site suffix.
2. Click SharePoint.



3. Click the SharePoint site you want to use.



4. You must take note of the URL. In this example, we are using 'https://Redpointglobal.sharepoint.com/sites/ECP-Dev' - use 'https://Redpointglobal.sharepoint.com' to configure the Server URL and 'sites/ECP-Dev' as the Site suffix when configuring the ECP in RPI's Configuration Workbench.

redpointglobal.sharepoint.com/sites/ECP-Dev

REDPOINT GLOBAL | SharePoint

ED ECP-Dev
Private group

Search this site + New Page details

Home
Conversations
Documents
Notebook
Pages
Site contents
Recycle bin
Edit

All files on this site could potentially be shared externally.

Documents See all

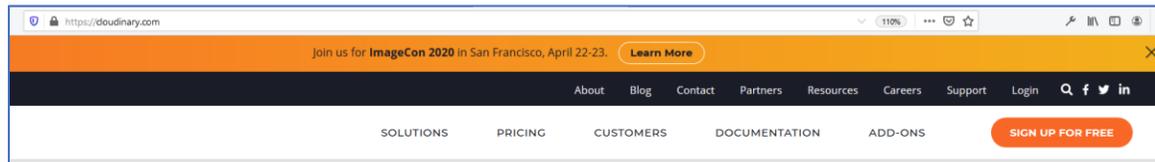
+ New Upload Sync Export to Excel All Documents

Name	Modified	Modified By
aaaaaaaaabbbbbbbccccccccccddddd...	June 17	Maree Laserna
Folder from RPI	June 9	Jerarl Bautista
Folder from RPI1	June 9	Jerarl Bautista

7.14 Cloudinary

This section describes how to create and configure a new Cloudinary account. Please follow the steps below:

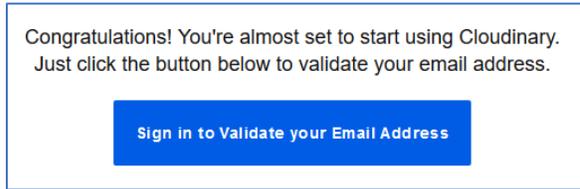
1. In a web browser, navigate to <https://cloudinary.com/>.
2. Click *Signup for free*.



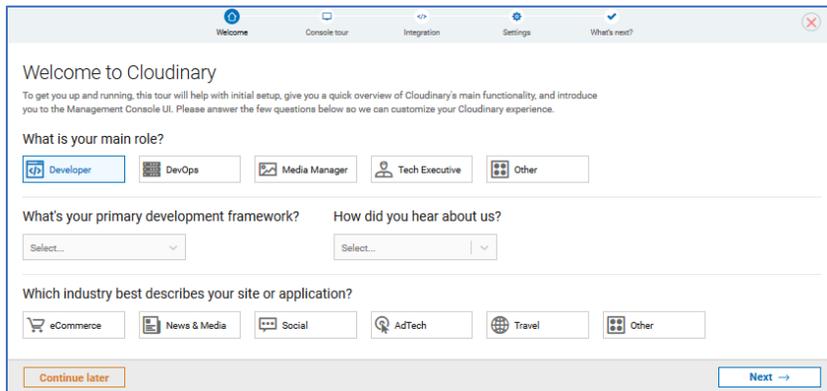
3. Provide all mandatory details and click *Create Account*.

A screenshot of the 'SIGN UP TO CLOUDINARY' form. The form is titled 'SIGN UP TO CLOUDINARY' and contains several input fields: 'Your name:', 'E-mail:', 'Password: (At least 8 characters, must contain at least one lower-case letter, one upper-case letter, one digit and a special character)', 'Country:' (with a dropdown menu showing 'Philippines'), 'Phone: (Optional)', 'Company or site name: (Optional)', and 'Primary interest:'. Below these fields, it shows 'Assigned cloud name: djdyezdr Edit'. At the bottom, there is a 'CREATE ACCOUNT' button. To the right of the form, there is a sidebar with a description of Cloudinary as a media management platform and a list of services: 'File Upload & Storage', 'Cloud Asset Management', 'Image and Video Manipulation', 'Optimization & Fast Delivery', and 'Presentation'. A 'LEARN MORE' button is located at the bottom of this sidebar.

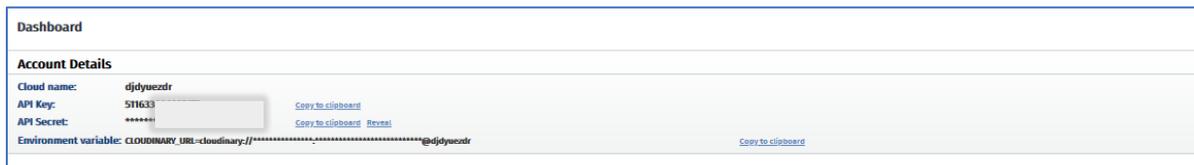
- Go to your inbox and locate the Cloudinary email to validate your Cloudinary account. Click *Sign in to Validate your Email Address* and you will be redirected to the Cloudinary portal.



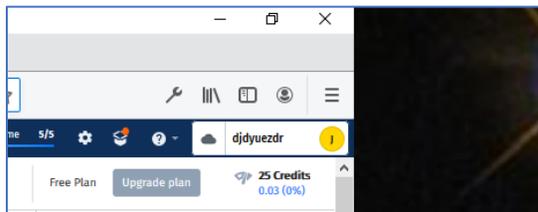
- Click *Next* to complete the registration process.



- In your Cloudinary dashboard, secure the values of the following parameters: Cloud name, API Key, and API Secret (used when provisioning new a Cloudinary connector in RedPoint Interaction).



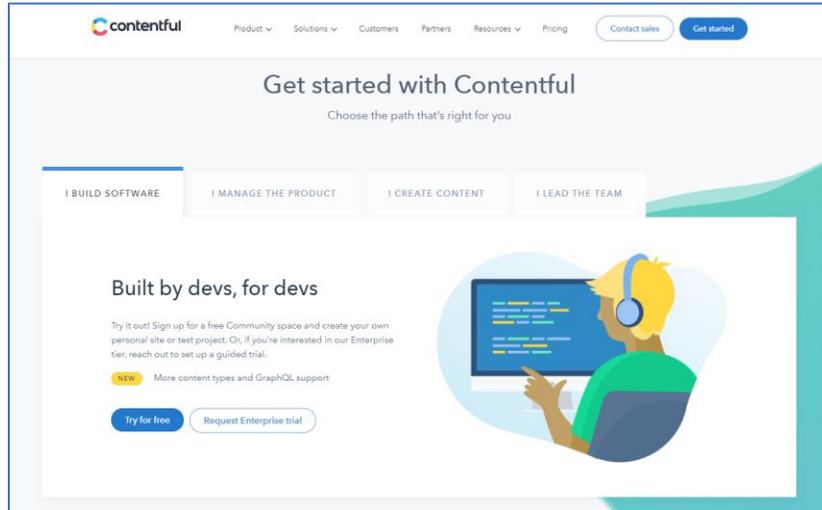
- If you wish to upgrade your free account, click *Upgrade plan*, and follow further steps as provided.



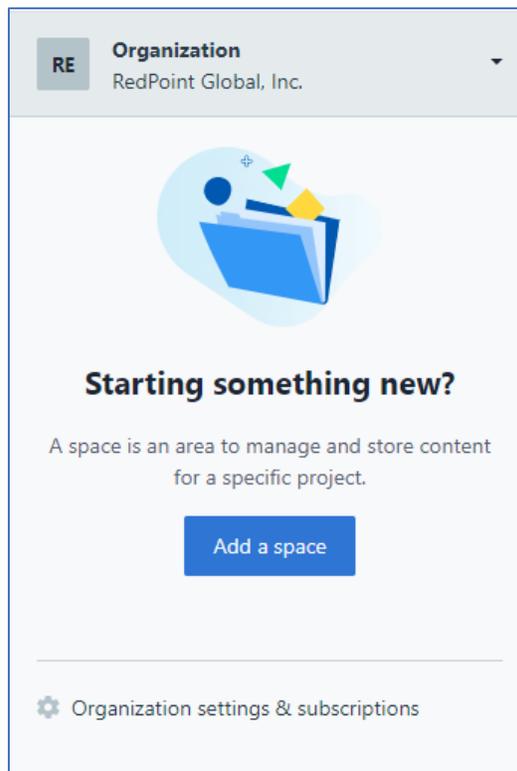
7.15 Contentful

This section shows how to configure a Contentful space to support an RPI external content provider.

1. Create or log in to a Contentful account.



2. After signing in, select Add a space.



3. Choose the space type.

1. Space type 2. Space details 3. Confirmation ✕

Choose the space type

You are creating this space for the organization RedPoint Global, Inc..

⚠ [Add payment details](#) for the organization before creating a paid space.

Community 0/1 free space ?

4 [Environments](#) 2 [Roles](#) 2 [Locales](#) 48 [Content types](#) 25,000 [Records](#) >

Medium \$489/month

4 [Environments](#) 2 [Roles](#) 7 [Locales](#) 48 [Content types](#) 25,000 [Records](#)

Large \$879/month

6 [Environments](#) 13 [Roles](#) 10 [Locales](#) 48 [Content types](#) 50,000 [Records](#)

4. Provide the space details. Enter the name and type (empty or example) of the space.

1. Space type 2. Space details 3. Confirmation ✕

Choose a name

You are about to create a community space for **\$0/month**.

Space name (required)

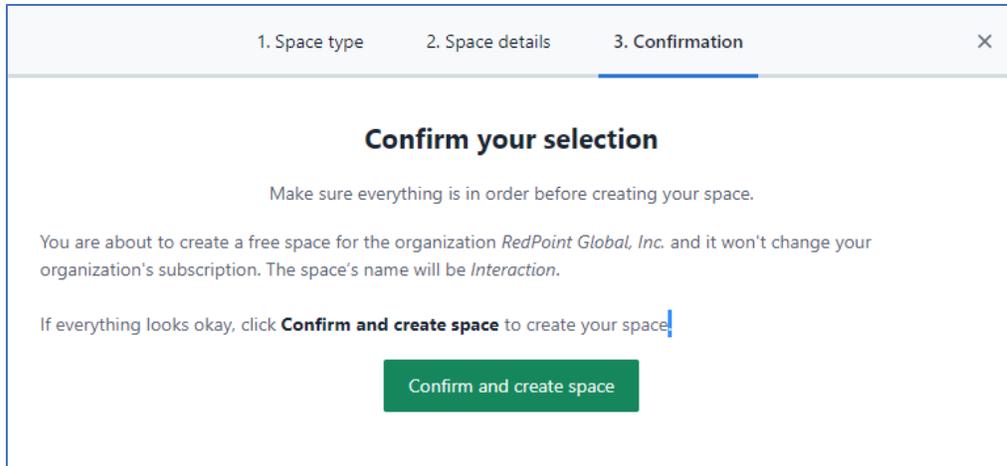
Interaction

Create an empty space.
I'll fill it with my own content.

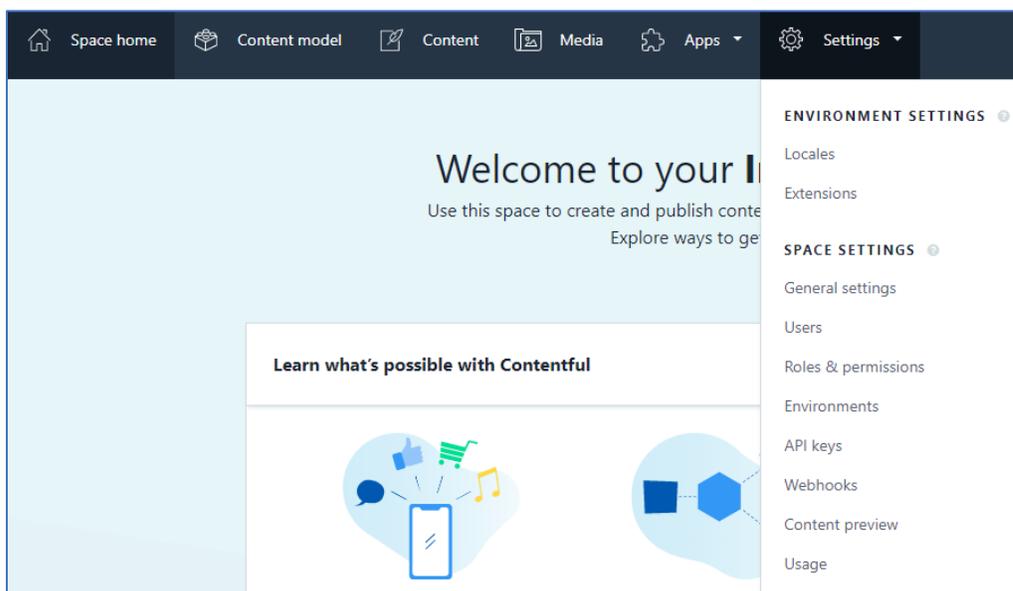
Create an example space.
I'd like to see how things work first.

[Proceed to confirmation](#)

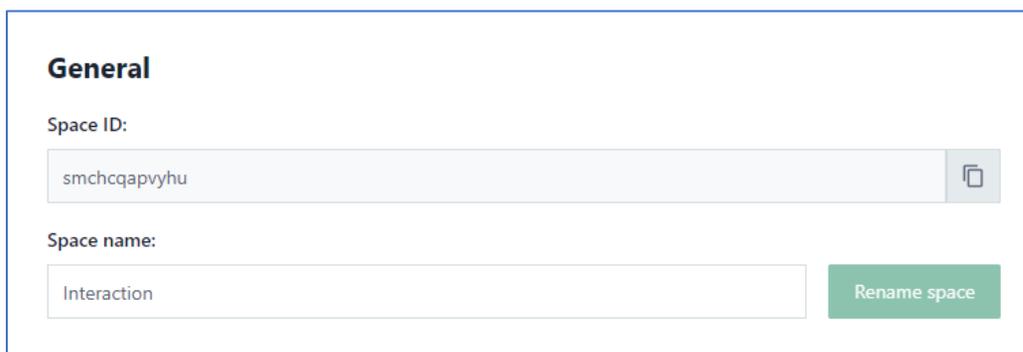
5. Confirm the creation of the new space.



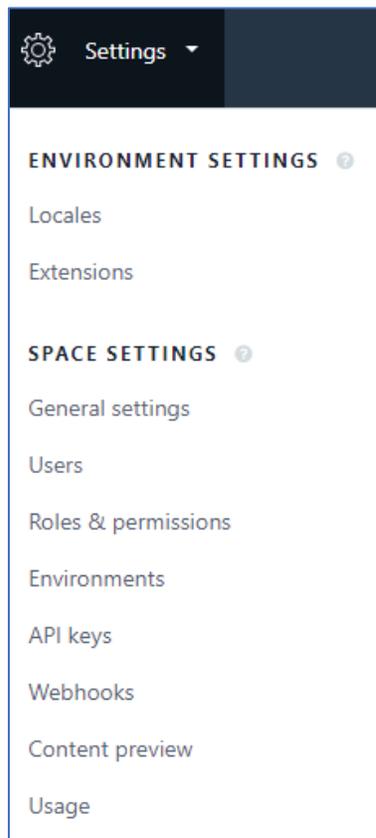
- At the top menu, click Settings > Space Settings > General Settings.



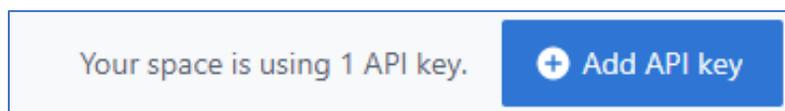
- Copy the ID of the new space. This will be used in the Space ID field in the Contentful external content provider (ECP) configuration in Redpoint Interaction.



- At the top menu, click Settings > Space Settings > API keys.



- Click the "Add API Key" button.



- Provide the Name and Description of your API key. Take note of the "Content Delivery API – access token." This will be used in the Access token field in the Contentful's ECP configuration in Redpoint Interaction.

Access tokens

To query and get content using the APIs, client applications need to authenticate with both the Space ID and an access token.

Name (required)

Interaction API Key

Can be platform or device specific names (i.e. marketing website, tablet, VR app)

Description

API Key for RedPoint Interaction

You can provide an optional description for reference in the future

Space ID

smchcqapvyhu



Content Delivery API - access token

WdkpbYeOAw [redacted] VzHZQOgcuzYw



Content Preview API - access token

6OkRgLOEaMF [redacted] A24n4pcHtE



Preview unpublished content using this API (i.e. content with "Draft" status). [Read more](#)

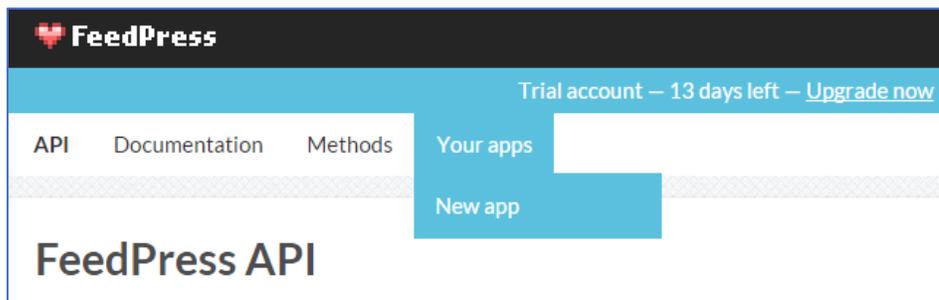
8 RSS Configuration

This section provides guidance on undertaking the following:

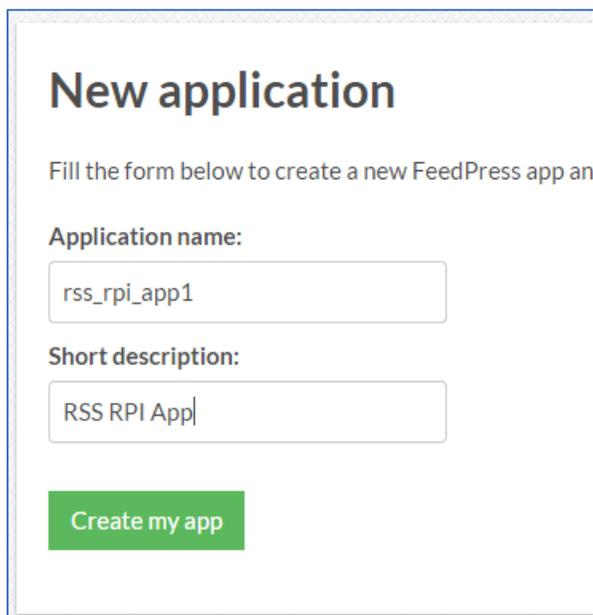
- Creating an application in FeedPress. **Note:** this requires an existing FeedPress account
- Validating a FeedPress feed alias
- Updating feed settings after a new RSS feed has been published
- How to logout from FeedPress

8.1.1 Create application in FeedPress

1. In a web browser, browse to <https://feed.press/> to log into your FeedPress account.
2. Navigate to <https://feed.press/api/> and then click **New app** under the Your apps tab.



3. The New application form is displayed. Enter the desired name and description for the app then click Create my app.

A screenshot of the 'New application' form. The title is 'New application'. Below the title is the instruction 'Fill the form below to create a new FeedPress app and'. There are two input fields: 'Application name:' with the value 'rss_rpi_app1' and 'Short description:' with the value 'RSS RPI App'. At the bottom is a green button labeled 'Create my app'.

- The details of the newly-created app are displayed.

rss_rpi_app1

- Description: RSS RPI App
- API key: [masked]
- Your token: [Generate a token for your user](#)

App details

Application name:

Short description:

[Edit the app](#)

Delete the app

Warning: App deletion is irreversible, please check the details before deleting.

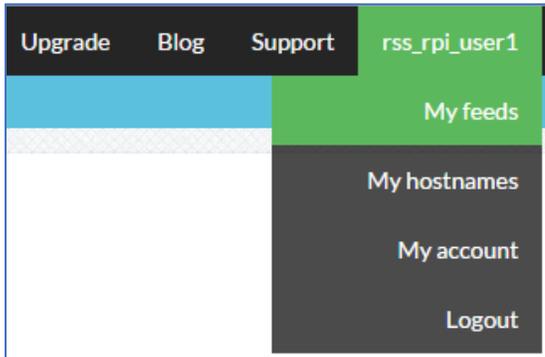
[Delete the app](#)

- Take note of the account name and the API key as you will need this to configure the RSS channel plugin.

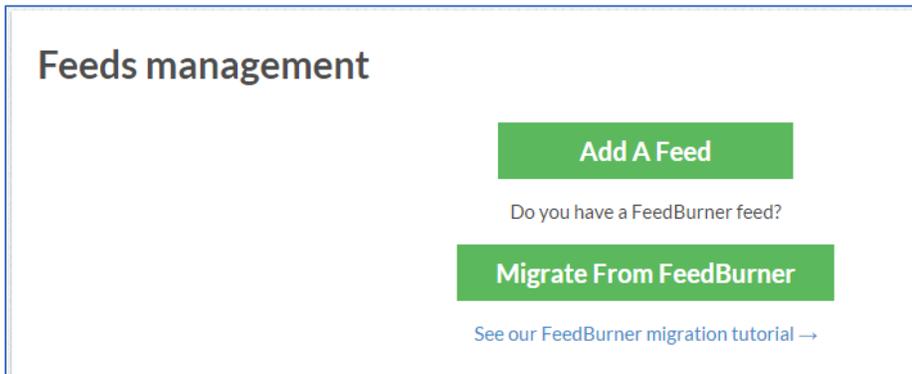
8.1.2 Validate FeedPress feed alias

Before creating an RSS offer, you need to make sure that the feed alias you use is owned by you. To check, follow these steps:

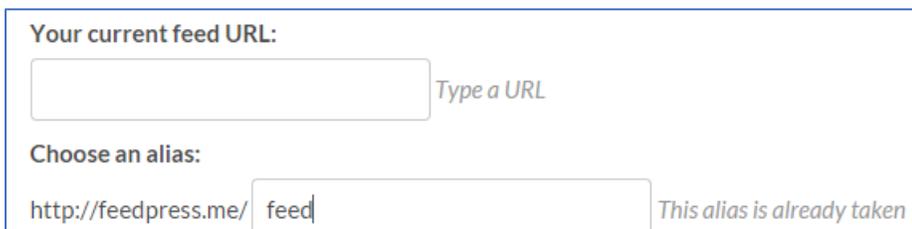
1. In a web browser, browse to <https://feed.press/> to log into your FeedPress account.
2. Select **My feeds**.



3. A list of your feeds will be displayed (the list will be empty for a newly-created account).
4. Under Feeds management, click Add A Feed to open the form to create a new feed.



5. In the Choose an alias setting, enter the desired alias and FeedPress will validate if this is already taken.

A screenshot of the 'Choose an alias' form. It features two input fields. The first field is labeled 'Your current feed URL:' and contains a placeholder text 'Type a URL'. The second field is labeled 'Choose an alias:' and contains the text 'http://feedpress.me/feed'. To the right of this second field, there is a red error message that says 'This alias is already taken'.

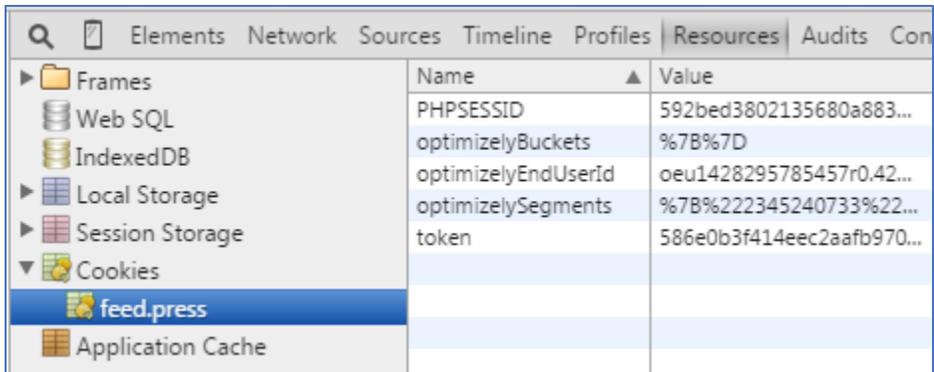
8.1.3 Update feed settings after a new RSS feed has been published

When a new feed is published by RPI, it is imperative to update the feed settings in FeedPress to facilitate push notification to and track the feed's readers.

1. In a web browser, browse to <https://feed.press/> to log into your FeedPress account.
2. Navigate to <https://feed.press/feeds/>.
3. Click **Admin** in respect of the desired feed.
4. Click **Settings**.
5. Under **Feed customization**:
 - a. Check **Activate Push notifications (PubSubHubbub)**.
 - b. Uncheck **Display your actual feed URL and not FeedPress**.
 - c. Check **Enable click tracking and entry opening**.
6. Click **Update settings**.

8.1.4 Logging Out from FeedPress

1. In your web browser settings, find the cookie called **feed.press**.
2. Click **clear** to delete the content of this cookie.



	Name	Value
	PHPSESSID	592bed3802135680a883...
	optimizelyBuckets	%7B%7D
	optimizelyEndUserId	oeu1428295785457r0,42...
	optimizelySegments	%7B%222345240733%22...
	token	586e0b3f414eec2aafb970...
feed.press		
Application Cache		

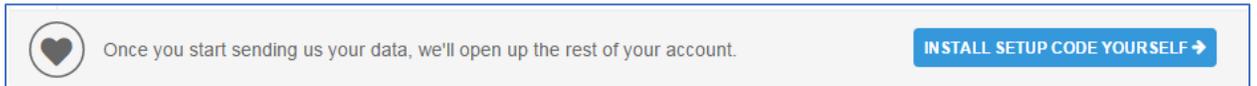
9 Web Adapter Provider Configuration

9.1 Kissmetrics Configuration

This section outlines how to setup Kissmetrics for use with its RPI web adapter.

9.1.1 Creating a New Website

1. Log in to Kissmetrics.
2. Navigate to <https://app.kissmetrics.com/get-started>.
3. Click "INSTALL SETUP CODE YOURSELF".

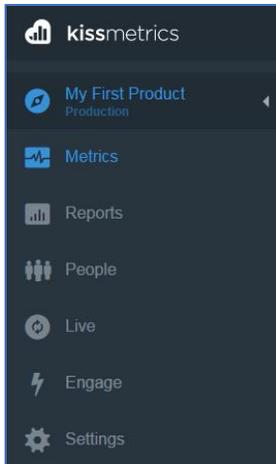


4. Javascript code will be displayed; you need to include this code on every page of your website that requires to be tracked by Kissmetrics.

1 Install this JavaScript right above your Google Analytics tracking code on every page of your site.
This is how KISSmetrics tracks visits, referrers, ad campaigns, and search data automatically

```
<!-- KISSmetrics tracking snippet -->
<script type="text/javascript">var _kmq = _kmq || [];
var _kmk = _kmk || '32d96f348104a5c6a499459741fd004e4b2c0e00';
function _kms(u) {
  setTimeout(function() {
    var d = document, f = d.getElementsByTagName('script')[0],
    s = d.createElement('script');
    s.type = 'text/javascript'; s.async = true; s.src = u;
    f.parentNode.insertBefore(s, f);
  }, 1);
}
_kms('//i.kissmetrics.com/i.js');
_kms('//scripts.kissmetrics.com/' + _kmk + '.2.js');
</script>
```

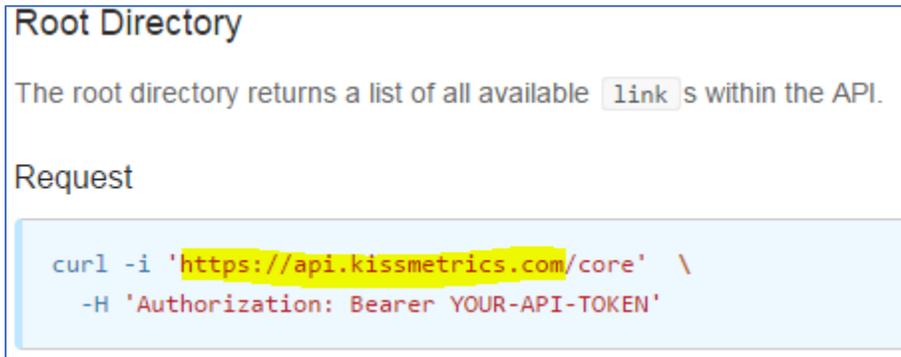
5. On the lower part of the page. Click "Open all of Kissmetrics for me".
6. All other Kissmetrics functionality is made available. On the upper left-hand side of the Kissmetrics interface, select your new site (in the example below, "My First Product"):



7. To rename the site, go to “Settings” > “Edit site” then enter the site name.
8. Click save changes.

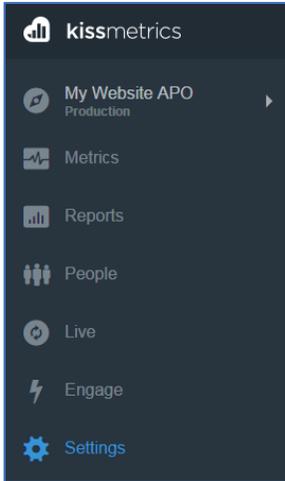
9.1.2 Getting the Base URI

1. Go to the Kissmetrics Core API documentation (<http://support.kissmetrics.com/apis/core-api.html>).
2. Scroll down to Root Directory (<http://support.kissmetrics.com/apis/core-api.html#root-directory>).
3. Copy the URL as highlighted below(<https://api.kissmetrics.com>).

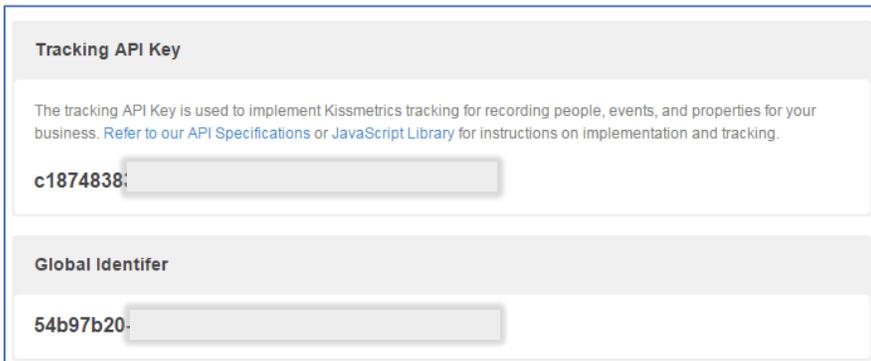


9.1.3 Getting the Tracking API Key and Global Identifier

1. Log in to Kissmetrics
2. Make sure to select your production website (in this example, “My First Product”). Your account can support multiple websites, each of which has different tracking key, so be sure to select the correct one.
3. Go to “Settings” or navigate to <https://app.kissmetrics.com/settings>.

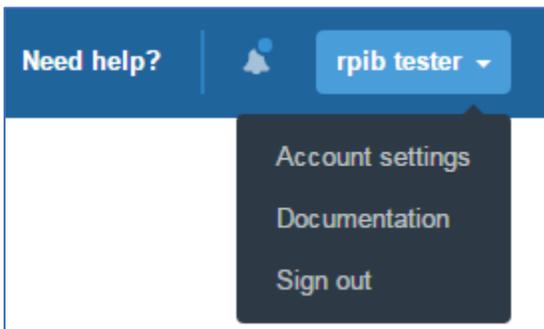


4. Copy the tracking API key and Global identifier

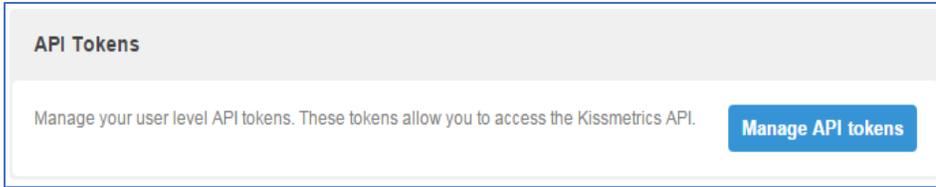


9.1.4 Getting the API Token

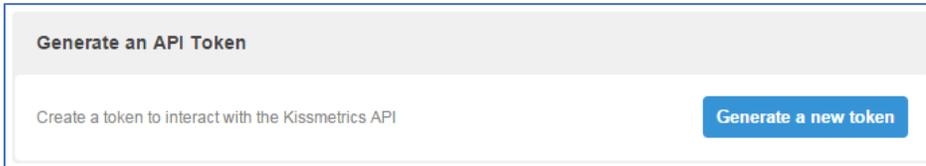
1. Log in to Kissmetrics
2. Click "Account Settings" (to the upper right):



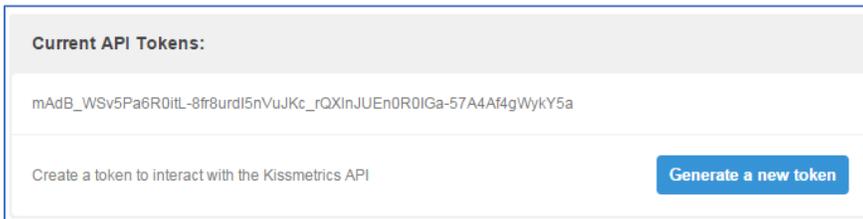
3. Scroll down in API Tokens.



4. Click "Manage API tokens"
5. When the API token page is displayed, click "Generate a new token".

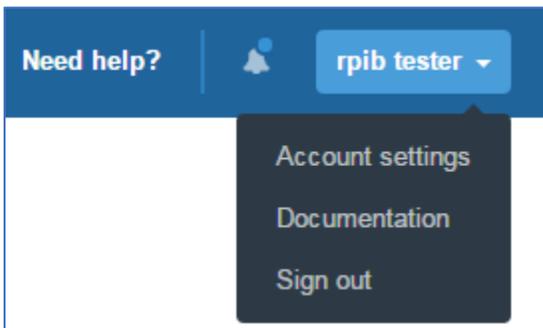


6. Copy the generated token, as you will need this value to configure the RPI Kissmetrics API token property.

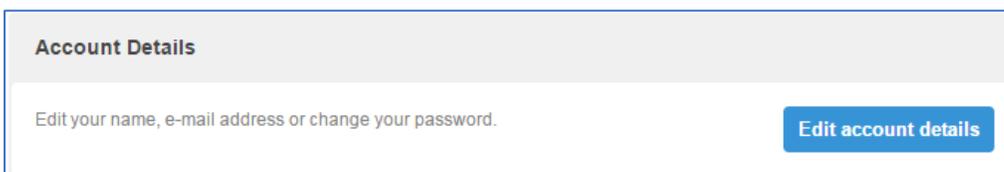


9.1.5 Getting the Account Name

1. Log in to Kissmetrics.
2. Click "Account Settings", to the upper right:



3. Click Edit account details



4. Copy the account name

9.1.6 Recording Events and Properties

Before setting up a new Kissmetrics adapter, you must first record the event and properties to be used by Redpoint Interaction, thereby ensuring that the tracking code is successfully installed.

1. Get any URL where Kissmetrics tracking is installed. Ex. <http://119.92.171.46/service.html>.
2. Append the event Email to the URL: "kme=Email"
3. Append the property exid to the URL: "km_exid=0"
4. Append the property campaign to the URL: "km_campaign=test_campaign"
5. Your URL should resemble the following:

`http://119.92.171.46/service.html?kme=Email &km_exid=0&km_campaign=test_campaign`
6. Browse to the URL. Note that Kissmetrics may take some time to record the event.
7. Refresh the Kissmetrics events/properties breakdown to check if the event Email and properties (exid and campaign) have been successfully recorded.

9.1.7 Creating Unique Visit Metrics

In this example, we will create a metric that will count the unique visits.

1. Login to your Kissmetrics account.
2. Select your website.
3. Click Metrics > Add new metric
4. Select "Number of People Who Did Event"
5. Click "Continue with this metrics"
6. Set a unique metric name
7. Set the event to "Email"
8. Click "Display option", make sure that Unit type is set to "Numeric"
9. Click "Save metric"

Take note of the metric name and use this to configure the RPI Kissmetrics adapter metrics.

9.1.8 Creating Visit Metrics

In this example, we will create a metric that will the count the total number of visits.

1. Login to your Kissmetrics account.
2. Select your website.
3. Click Metrics > Add new metric
4. Select "Number of Times Event Happened"

5. Click "Continue with this metrics"
6. Set a unique metric name
7. Set the event to "Email"
8. Click "Display option", make sure that Unit type is set to "Numeric"
9. Click "Save metric"
10. Take note of the metric name and use this to configure Kissmetrics adapter metrics
11. Additional note: when creating other metrics, it is important to set the Unit Type to Numeric

▾ Display options:

Unit Type:
Use these options to adjust the units to display, useful for adding units to your properties. If you want to see a conversion or time-based metric, make sure you go back and select that metric type.

Numeric ▾

Round to Value:

99 ▾

Prefix: *(optional)* **Postfix:** *(optional)*

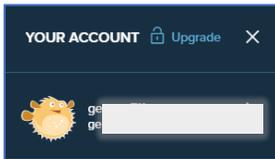
9.2 Bitly Configuration

This section describes how to configure a Bitly web adapter for use with RPI. Please follow the steps below:

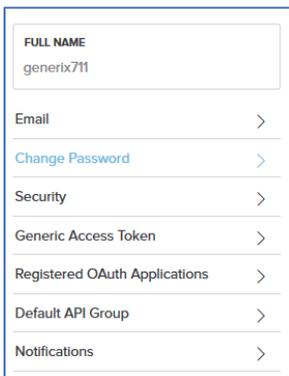
1. In a web browser, log into https://bitly.com/a/sign_in?rd=bbt2/ to acquire OAuth credentials such as client ID, client secret and redirect URIS.
2. Click the *Settings* icon located at the upper right corner of your home page.



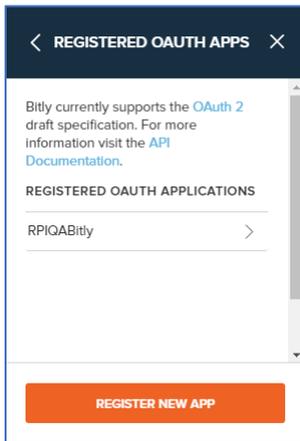
3. Click the account name as in the example below.



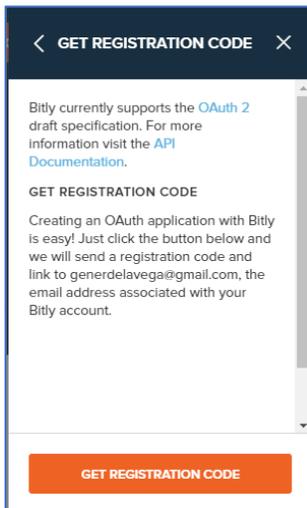
4. Click *Registered OAuth Applications*.



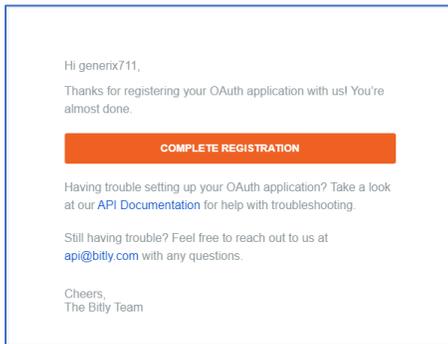
5. Click *Register New App*.



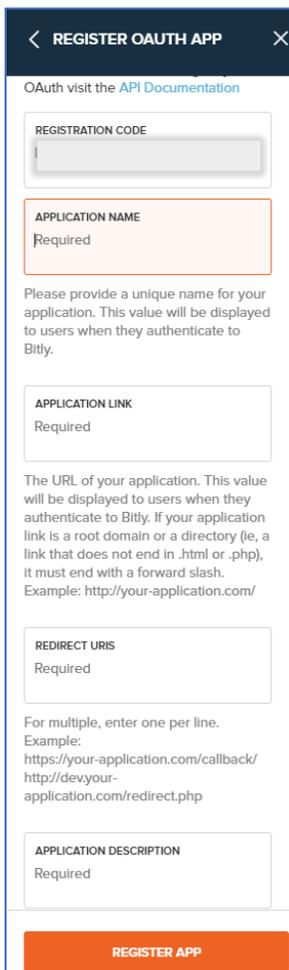
6. Click *Get Registration Code*.



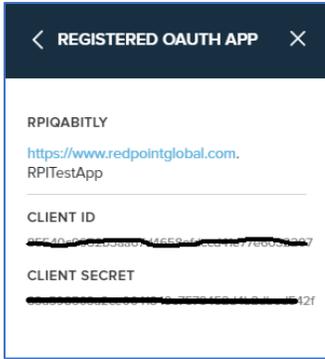
7. Bitly will send an email notification to complete the registration. In your mail inbox, click the *Complete Registration* button.



8. On *Register OAuth App*, provide values for the following entries: *Application Name*, *Application Link*, *Redirect URIS*, and *Application Description*. Click *Register App* to create a new OAuth application.

A screenshot of the "REGISTER OAUTH APP" form. The form has a dark header with a back arrow, the title "REGISTER OAUTH APP", and a close icon. Below the header, it says "OAuth visit the [API Documentation](#)". There are five input fields: "REGISTRATION CODE" (empty), "APPLICATION NAME" (with a red border and "Required" text below it), "APPLICATION LINK" (with "Required" text below it), "REDIRECT URIS" (with "Required" text below it), and "APPLICATION DESCRIPTION" (with "Required" text below it). Below the "REDIRECT URIS" field, there is explanatory text: "The URL of your application. This value will be displayed to users when they authenticate to Bitly. If your application link is a root domain or a directory (ie, a link that does not end in .html or .php), it must end with a forward slash. Example: http://your-application.com/". Below that, it says "For multiple, enter one per line. Example: https://your-application.com/callback/ http://devyour-application.com/redirect.php". At the bottom of the form is an orange button labeled "REGISTER APP".

9. Once OAuth app is registered successfully, copy Redirect URIS, Client ID, and Client Secret. The values of these parameters will be used in RPI when configuring a Bitly web adapter.



10. A sample configuration of Bitly Web Adapter within RPI:

Selected Adapter Details

Name:

Description:

Connectivity test:

Website URL:

Client ID: If set, shortens specified URL only - else all URLs in content

Client secret: Client ID to use when making OAuth 2.0 access token requests

Redirect URI: Client secret to use when making OAuth 2.0 access token requests

Authorization: The connection to Bitly has been authorized Redirect URI to use when making OAuth 2.0 access token requests

Append execution ID: If checked, a campaign execution ID parameter is appended to the URL to enable clicks to be tracked to the source activity

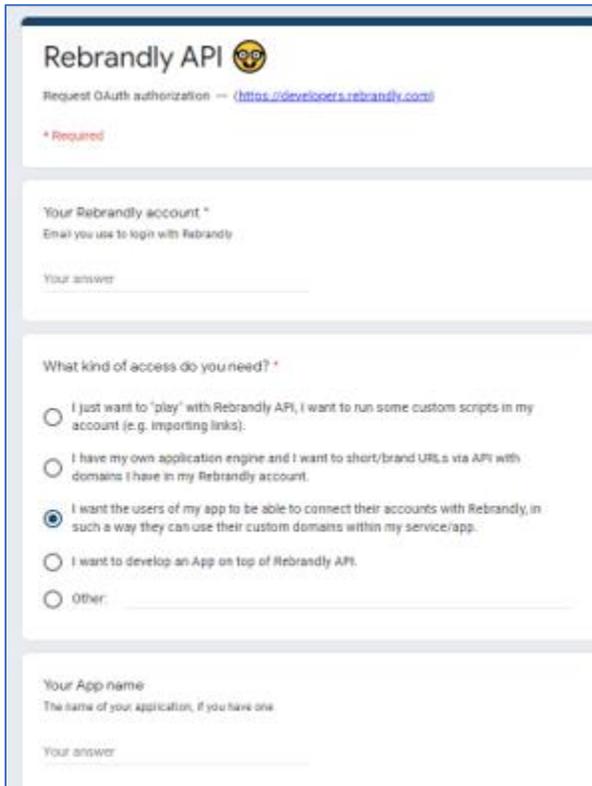
Reuse provisioned short URLs: If checked, already provisioned short URLs for long URLs will be reused instead of creating new ones

9.3 Rebrandly Configuration

9.3.1 Requesting an OAuth Client ID and Client Secret keys

This section describes how to submit a request for Rebrandly's OAuth Client ID and Client Secret keys. Please follow the steps below:

1. In a web browser, navigate to <http://rebrand.ly/AuthorizeMe>.
2. Provide the information as requested. You use Redpoint Interaction as App Name. Click **Submit**.



The screenshot shows the 'Rebrandly API' OAuth authorization page. At the top, it says 'Request OAuth authorization -- (https://developers.rebrandly.com)'. Below this is a red asterisk and the word 'Required'. The form has three main sections: 1. 'Your Rebrandly account *' with a sub-label 'Email you use to login with Rebrandly' and a text input field labeled 'Your answer'. 2. 'What kind of access do you need? *' with five radio button options: 'I just want to "play" with Rebrandly API, I want to run some custom scripts in my account (e.g. importing links).', 'I have my own application engine and I want to short/brand URLs via API with domains I have in my Rebrandly account.', 'I want the users of my app to be able to connect their accounts with Rebrandly, in such a way they can use their custom domains within my service/app.' (which is selected), 'I want to develop an App on top of Rebrandly API.', and 'Other:'. 3. 'Your App name' with a sub-label 'The name of your application, if you have one' and a text input field labeled 'Your answer'.

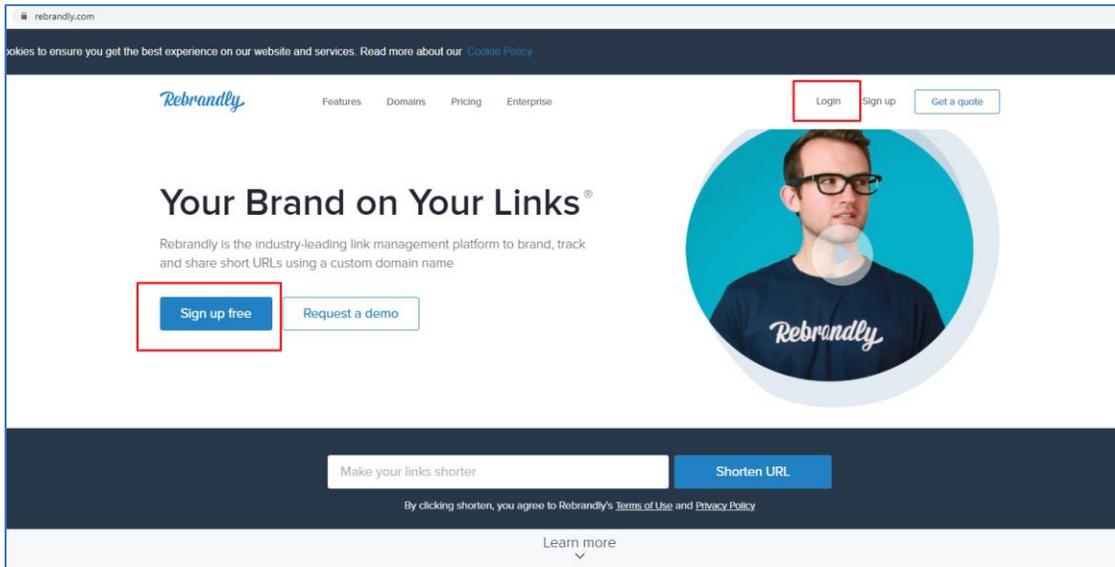
2. Wait for response from Rebrandly's tech support. If asked for more info, tell them that you need a Client ID and Client Secret keys for OAuth authentication; once received, use them at the Client ID and Client Secret fields within the Rebrandly Web Adapter configuration interface in RPI.

9.3.2 Additional Config Settings

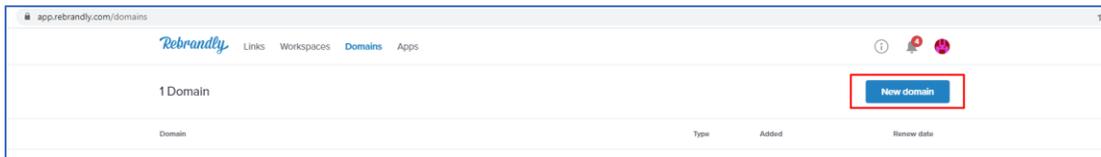
1. For **Redirect URI** you may use any URL.

9.3.3 Linking your Rebrandly Domain

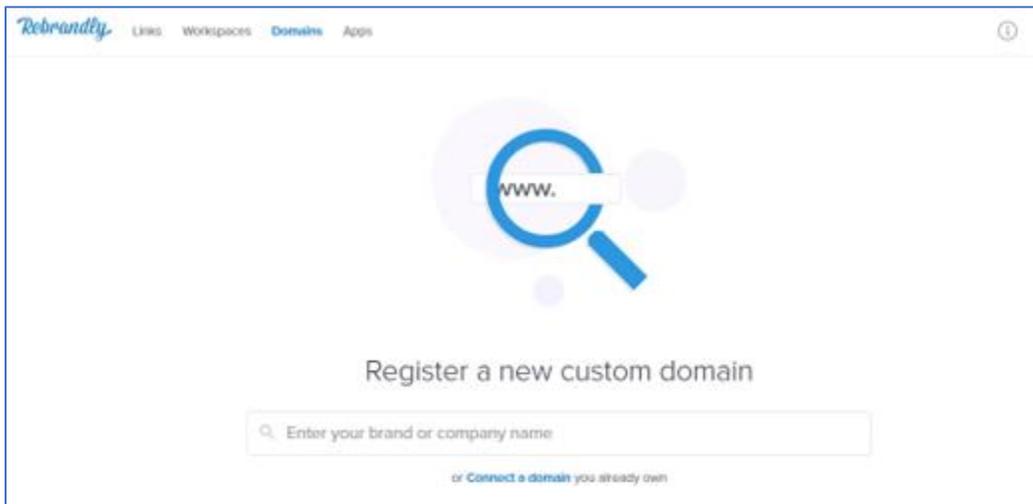
1. In a web browser, navigate to <https://www.rebrandly.com>; **Signup** or **Login** to your account.



2. After signing in, register or link a Domain using the **New Domain** button.



3. Follow the instructions provided on the page to register or link your domain.



Once the domain has been created, you can use it in Domain field in the Rebrandly Web Adapter configuration interface in RPI.

10 Queue Provider Configuration

10.1 Apache ActiveMQ

1. Download Apache ActiveMQ's latest binary distribution from Apache's website:

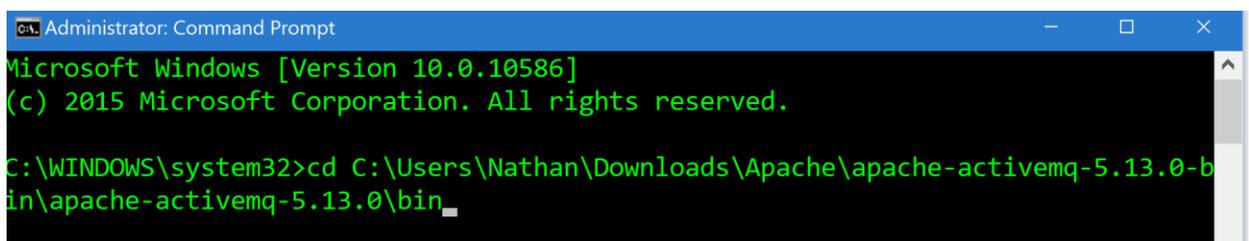
<http://activemq.apache.org/download.html>

2. Unzip the download file into your choice of directory.

ctivemq-5.13.0-bin > apache-activemq-5.13.0

<input type="checkbox"/> Name	Date modified
bin	11/30/2015 2:14 P...
conf	11/30/2015 2:14 P...
data	12/8/2015 5:29 PM
docs	11/30/2015 2:14 P...
examples	11/30/2015 2:14 P...
lib	11/30/2015 2:14 P...
webapps	11/30/2015 2:14 P...
webapps-demo	11/30/2015 2:14 P...
activemq-all-5.13.0	11/30/2015 2:06 P...
LICENSE	11/30/2015 2:14 P...
NOTICE	11/30/2015 2:14 P...
README	11/30/2015 2:14 P...

3. Open a Command Prompt and change directory to the bin directory of the unzipped ActiveMQ archive.



```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.10586]
(c) 2015 Microsoft Corporation. All rights reserved.

C:\WINDOWS\system32>cd C:\Users\Nathan\Downloads\Apache\apache-activemq-5.13.0-b
in\apache-activemq-5.13.0\bin
```

4. Type the following at the command prompt:

```
activemq start
```

Press Enter. ActiveMQ will then be running.

```

INFO | Apache ActiveMQ 5.13.0 (localhost, ID:NathanP-51180-1453191406310-0:1) i
s starting
INFO | Listening for connections at: tcp://NathanP:61616?maximumConnections=100
0&wireFormat.maxFrameSize=104857600
INFO | Connector openwire started
INFO | Listening for connections at: amqp://NathanP:5672?maximumConnections=100
0&wireFormat.maxFrameSize=104857600
INFO | Connector amqp started
INFO | Listening for connections at: stomp://NathanP:61613?maximumConnections=1
000&wireFormat.maxFrameSize=104857600
INFO | Connector stomp started
INFO | Listening for connections at: mqtt://NathanP:1883?maximumConnections=100
0&wireFormat.maxFrameSize=104857600
INFO | Connector mqtt started
INFO | Listening for connections at ws://NathanP:61614?maximumConnections=1000&
wireFormat.maxFrameSize=104857600
INFO | Connector ws started
INFO | Apache ActiveMQ 5.13.0 (localhost, ID:NathanP-51180-1453191406310-0:1) s
tarted
INFO | For help or more information please see: http://activemq.apache.org
INFO | No Spring WebApplicationInitializer types detected on classpath
INFO | ActiveMQ WebConsole available at http://0.0.0.0:8161/
INFO | ActiveMQ Jolokia REST API available at http://0.0.0.0:8161/api/jolokia/
INFO | Initializing Spring FrameworkServlet 'dispatcher'
INFO | No Spring WebApplicationInitializer types detected on classpath
INFO | jolokia-agent: No access restrictor found at classpath:/jolokia-access.x
ml, access to all MBeans is allowed

```

5. Take note of the following information from the command prompt window:

- The TCP connection (tcp://NathanP:61616 in the image above). This will be used as the connection string for the Apache ActiveMQ queue provider in RPI.

SELECTED QUEUE PROVIDER DETAILS

Name:

Description:

Type: Apache Active MQ

Use this queue provider: Whether this provider is used for web processing

Connectivity test:  Test connectivity

Configuration:  Copy XML configuration to clipboard

Connection string: Connection string used to connect to Apache ActiveMQ

- The port number in the web console address (http://0.0.0.0:8161) – 8161.

6. To access the ActiveMQ web console, open a browser and navigate to http://127.0.0.1:8161 (the port indicated above).
7. Use the following default credentials to log in:

- Username: admin
- Password: admin

The following page will be displayed:

ActiveMQTM

Home | Queues | Topics | Subscribers | Connections | Network | Scheduled | Send

Welcome!

Welcome to the Apache ActiveMQ Console of **localhost** (ID:NathanP-51180-1453191406310-0:1)

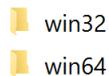
You can find more information about Apache ActiveMQ on the [Apache ActiveMQ Site](#)

Broker

Name	localhost
Version	5.13.0
ID	ID:NathanP-51180-1453191406310-0:1
Uptime	9 minutes
Store percent used	0
Memory percent used	0
Temp percent used	0

10.1.1 Install/Uninstall ActiveMQ as a Windows-NT Service

1. Navigate to the archive's bin directory.
2. Navigate to the folder matching your system's configuration.



3. Double-click the InstallService Windows batch file inside the folder.
4. ActiveMQ will now appear in your list of local Services.

Name	Description	Status	Startup Type
ActiveMQ	ActiveMQ B...	Running	Automatic

5. To uninstall the service, go to the same folder and double-click the 'UninstallService' Windows batch file instead.

10.1.2 Using ActiveMQ as the Default Queue Provider

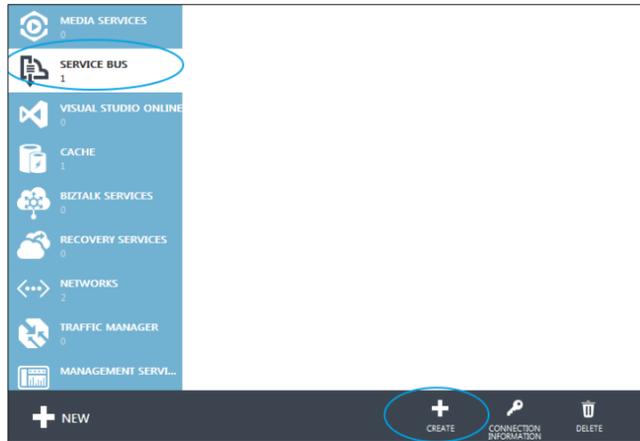
To use ActiveMQ as RPI's default queue provider, the Apache.NMS.ActiveMQ and Apache.NMS assemblies must be copied to the Services Common directory.

1. Copy the assemblies from the 'InteractionRealtimeAPI\bin' directory of the Deployment Files archive.
2. Paste the assemblies into the 'Redpoint Global\Redpoint Interaction\Services Common' directory under Program Files.

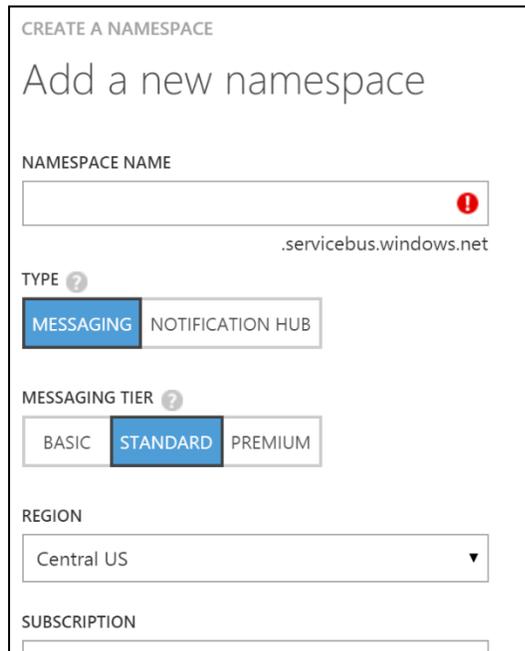
10.2 Azure Service Bus

This section describes how to configure Azure Service Bus for use with RPI. Please follow the steps below:

1. Set up your service bus namespace in Azure and obtain the connection string.
 - a. Log onto the Windows Azure portal (<https://manage.windowsazure.com>).
 - b. Once you have successfully logged into the portal, go to the Service Bus tab and click CREATE as shown below:



- c. Provide a NAMESPACE NAME, leave the default TYPE of MESSAGING, and choose your REGION and SUBSCRIPTION:

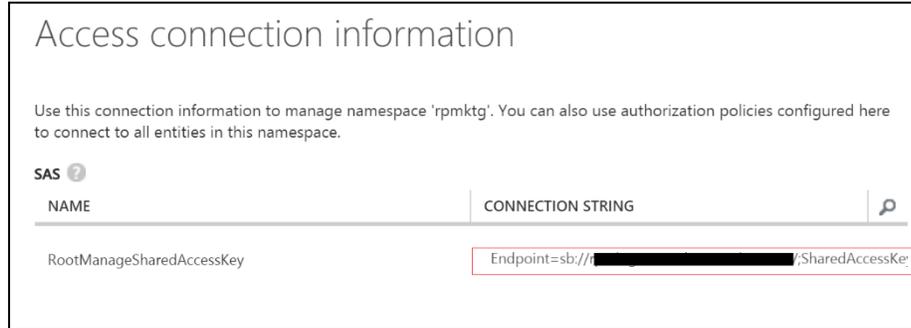
A screenshot of the 'CREATE A NAMESPACE' form in the Azure portal. The form title is 'Add a new namespace'. It contains several input fields and buttons:

- NAMESPACE NAME:** A text input field with a red exclamation mark icon on the right. Below it, the domain '.servicebus.windows.net' is displayed.
- TYPE:** A dropdown menu with 'MESSAGING' selected and 'NOTIFICATION HUB' as an alternative option.
- MESSAGING TIER:** A dropdown menu with 'STANDARD' selected, and 'BASIC' and 'PREMIUM' as other options.
- REGION:** A dropdown menu with 'Central US' selected.
- SUBSCRIPTION:** A text input field at the bottom of the form.

- d. Once the namespace is created it will appear in the list of service bus namespaces. Select the record and then click on the CONNECTION INFORMATION icon from the taskbar at the bottom of the page:

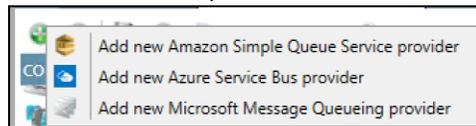


- e. From the Access connection information dialog that pops up, copy and record the entire CONNECTION STRING property value. This will be used when configuring the queue provider in RPI:

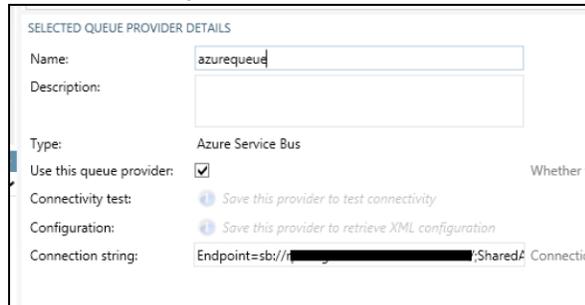


- 2. Setup RPI queue configuration elements to use your newly created Azure message bus as the queue provider.

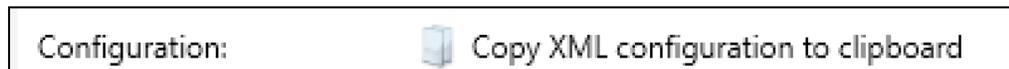
- a. Log in to the RPI Client as an Admin user and navigate to Configuration -> Queue Providers
- b. Select the icon with the plus sign to create a new queue provider then select the option 'Add new Azure Service Bus provider'



- c. Give your queue entry a name, select the option to 'Use this queue provider' and then paste in the Connection String harvested in the section above.



- d. Save the record and once saved, click on the 'Connectivity test:' button to verify connectivity to the service bus.
- e. Once successful connectivity has been verified, click on the 'Copy XML configuration to clipboard' button and record the XML configuration details. This will be used in the web.config file for the RPI Realtime API site:



- f. Navigate to Configuration -> System Configuration and set the value for following 3 queue related parameters. Please note that the queues need not already exist within the Azure service bus namespace as RPI will create the queues automatically if they do not exist:
 - FormSubmissionQueuePath
 - WebCacheQueuePath
 - WebEventQueuePath
 - g. Make a note of the names entered for the 3 queues as they will be entered in on the web.config file within the RPI Realtime API site in the next section.
3. Configure your Realtime API web.config file to reference the new queue provider and queues created in the sections above.

- a. Open up the web.config file at the root of the Realtime API web site directory in a text editor.
- b. Locate the webQueue XML tags within the web.config file:



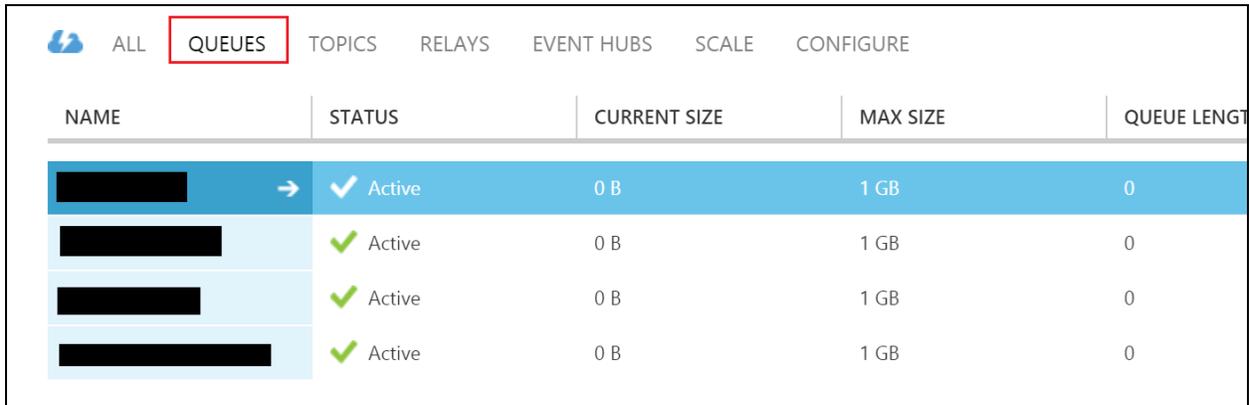
- c. Within these two tags, paste in the contents of the queue XML configuration details harvested in section 2e above.
- d. Locate the following three settings within the <applicationSettings> section of the web.config file and set respectively to match exactly the three system configuration values defined above in section 2f:
 - i. In this section, enter in the same value from RPI system configuration parameter FormSubmissionQueuePath:


```
<setting name="ProcessQueuePath" serializeAs="String">
  <value> value from FormSubmissionQueuePath </value>
</setting>
```
 - ii. In this section, enter in the same value from RPI system configuration parameter WebCacheQueuePath:


```
<setting name="WebCacheQueuePath" serializeAs="String">
  <value> value from WebCacheQueuePath </value>
</setting>
```
 - iii. In this section, enter in the same value from RPI system configuration parameter WebEventQueuePath:


```
<setting name="TrackingEventsQueuePath" serializeAs="String">
  <value> value from WebEventQueuePath </value>
</setting>
```

This completes the steps necessary to configure RPI to use Azure Service Bus message queues. You can validate that the queues have been created successfully from the Windows Azure portal. They will be listed under QUEUES within the namespace created in the first section above:



The screenshot shows the 'QUEUES' tab in the Azure portal. The table lists four message queues, all of which are 'Active' with a 'CURRENT SIZE' of '0 B' and a 'MAX SIZE' of '1 GB'. The 'QUEUE LENGTH' for all queues is '0'. The first row is highlighted in blue and includes a right-pointing arrow icon.

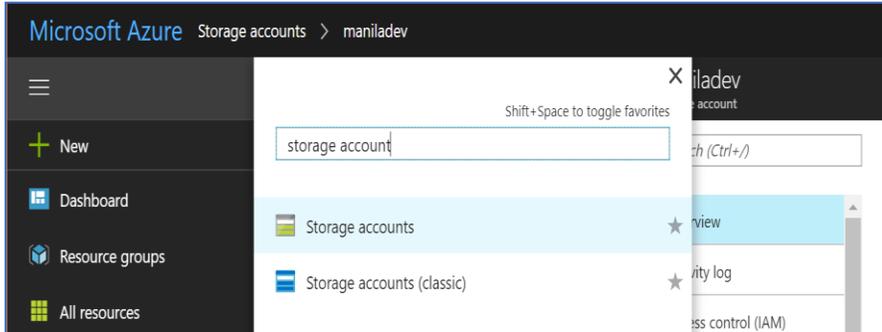
NAME	STATUS	CURRENT SIZE	MAX SIZE	QUEUE LENGTH
[REDACTED]	✓ Active	0 B	1 GB	0
[REDACTED]	✓ Active	0 B	1 GB	0
[REDACTED]	✓ Active	0 B	1 GB	0
[REDACTED]	✓ Active	0 B	1 GB	0

10.3 Azure Event Hubs

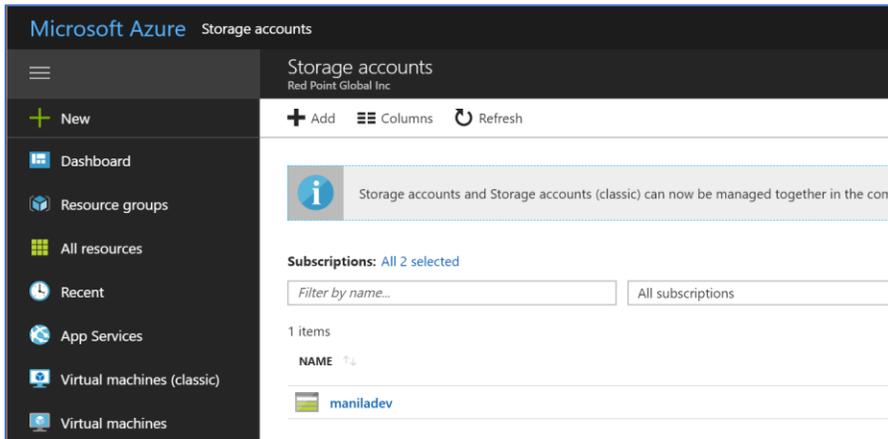
10.3.1 Provisioning the Storage Container Name and Connection String

This section describes how to create and configure an Azure Event Hubs on the Windows Azure portal. Please follow the steps below:

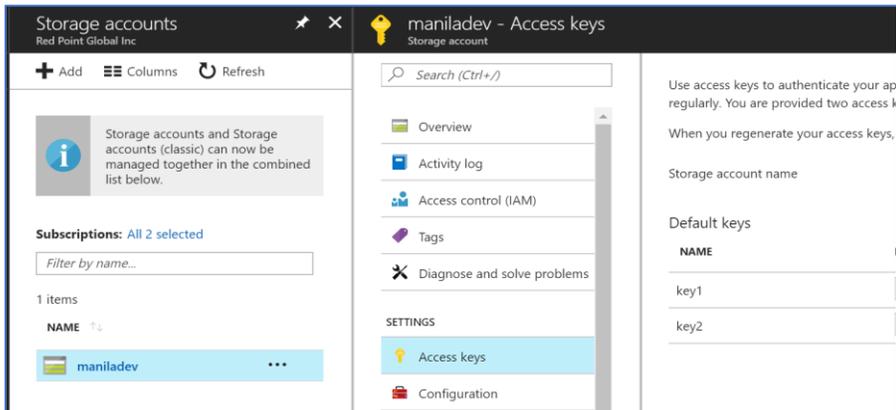
1. In a web browser, log into the Windows Azure portal (<https://portal.azure.com>).
2. Once you have successfully logged into the portal, search for the “Storage accounts” resource and click Storage accounts.



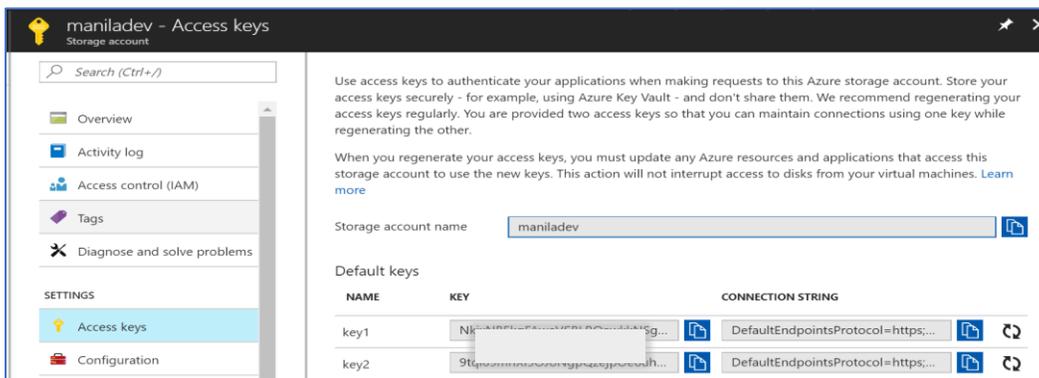
3. In the list of storage accounts, select and click the appropriate storage account to use (in this example, “maniladev”).



- Under Settings, click Access keys.

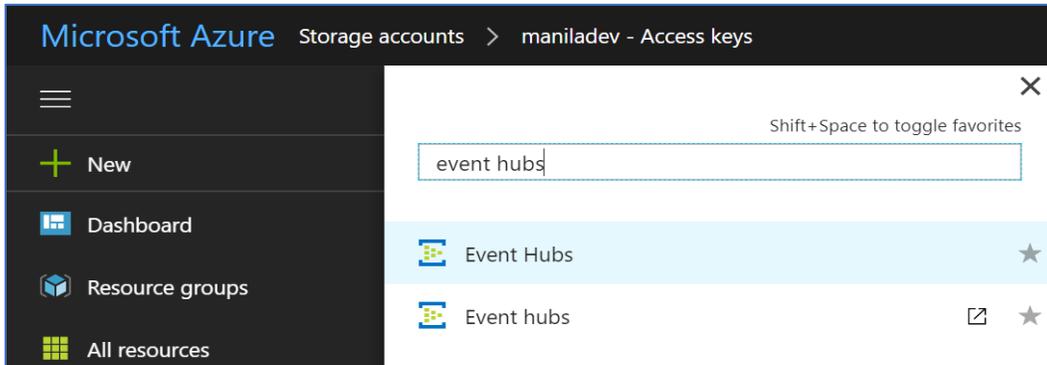


- Use the storage account name to configure the storage container name of the RPI Azure Event Hubs queue provider.
- Under Default keys, use the key1 connection string to configure the storage connection string of the RPI Azure Event Hubs queue provider.

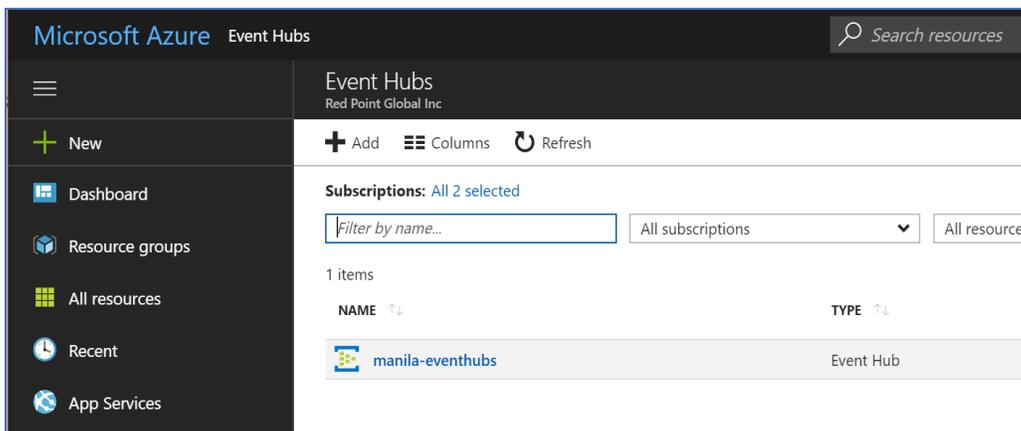


10.3.2 Provisioning the Event Hubs Name and Connection String

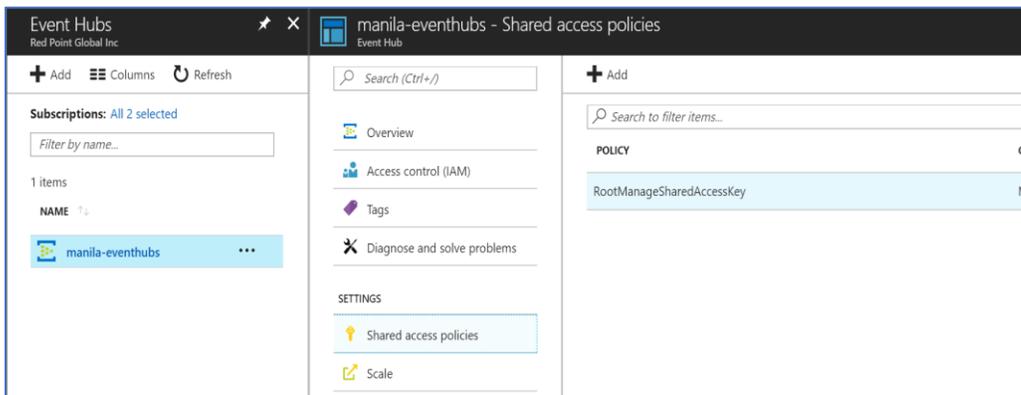
1. Once you have successfully logged into the portal, search for the “Event Hubs” resource and click Event Hubs.



2. In the list of event hubs, select the appropriate event hub to used (in this example, “manila-eventhubs”). Take note of the name as you will use this to configure the Event hubs name of the RPI Azure Event Hubs queue provider.

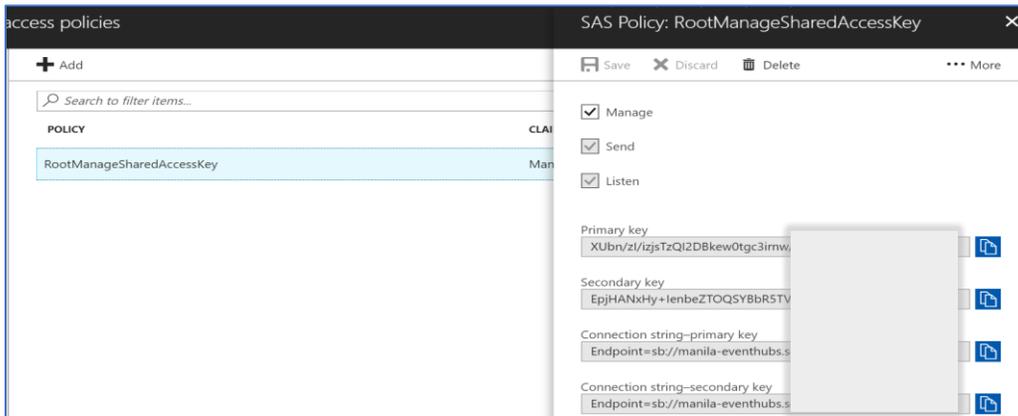


3. Click Shared access policies (located under Settings).



4. Click RootManageShareAccessKey (under Policy).

5. In the “SAS Policy: RootManageSharedAccessKey” panel, make sure Send and Listen are checked. Ask your Azure account admin to enable these options if they are not checked.



6. Use the Connection string-primary key to configure the Connection string of the RPI Azure Event Hubs queue provider.

10.4 RabbitMQ

This section describes how to create and configure RabbitMQ as a queue provider. Please follow the steps below:

1. In a web browser, navigate to <http://www.erlang.org/downloads>.
2. In the Erlang download portal, locate, and click the installer for Windows. In this case, download the 64bit installer.



DOWNLOAD OTP 20.3

Erlang/OTP 20.3 is a service release containing mostly bug fixes, as well as a few features.

- [OTP 20.3 Readme File](#)
- [OTP 20.3 Source File \(96826317\)](#)
- [OTP 20.3 Windows 32-bit Binary File \(96826317\)](#)
- [OTP 20.3 Windows 64-bit Binary File \(99142192\)](#)
- [OTP 20.3 HTML Documentation File \(33594990\)](#)
- [OTP 20.3 Man Pages File \(1339710\)](#)

Erlang/OTP 20.3 is the third service release for the 20 major release. The service release contains mostly bug fixes and characteristics improvements but also some new features.

3. Once the installer is downloaded, run the .exe file with administrator privileges.
4. After the installation of Erlang, navigate to <http://www.rabbitmq.com/install-windows.html> in a web browser.



Installing on Windows

Download the Server

Description	Download	
Installer for Windows systems (from Bintray)	rabbitmq-server-3.7.4.exe	(Signature)
Installer for Windows systems (from GitHub)	rabbitmq-server-3.7.4.exe	(Signature)

5. After installing RabbitMQ, navigate to <http://localhost:15672> in a web browser.



RabbitMQ

Username: *

Password: *

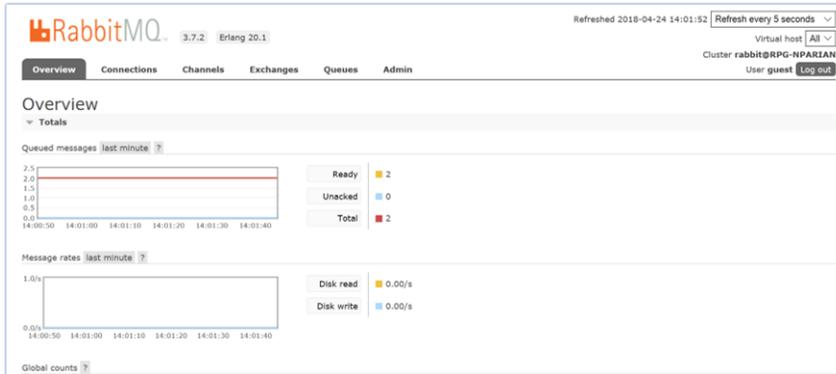
Login

6. Log in with the default credentials:

Username: guest

Password: guest

7. The RabbitMQ portal will be displayed.



10.5 Google Pub/Sub

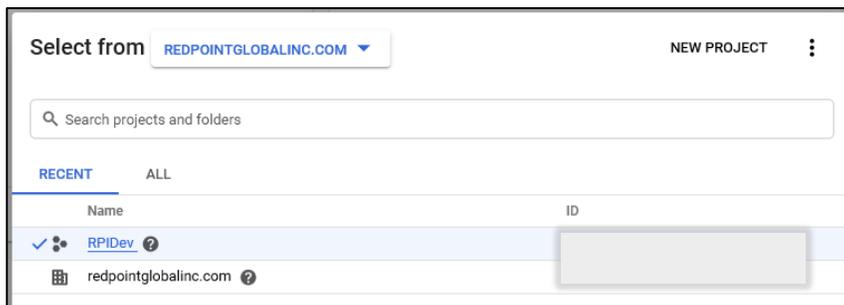
10.5.1 Creating a Topic in Google Pub/Sub

This section describes how to create a new Topic in Google Pub/Sub. Please follow the steps below:

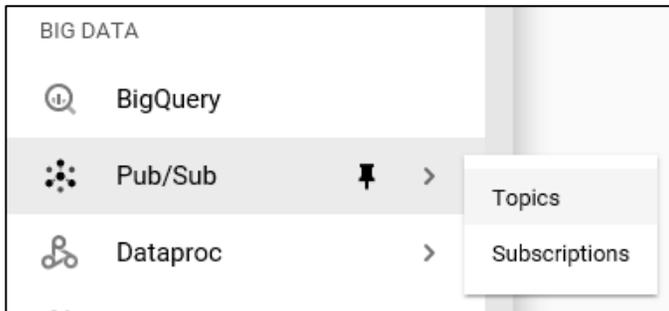
1. In a web browser, navigate to <https://console.cloud.google.com/>.
2. Click the menu next to the Google Cloud Platform header text.



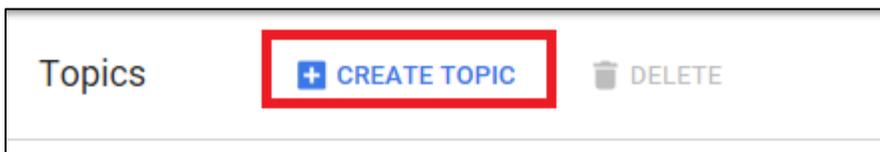
3. Select a project by checking its name and pressing the Open button.



4. In the left-hand panel, under the Big Data section, select Pub/Sub->Topics.



5. In the Topic page, press Create Topic. Complete the Topic Name field and press Create to save.



Create a topic

A topic forwards messages from publishers to subscribers.

Name ?

projects/rpidev-188321/topics/RPIListenerQueue2

CANCEL **CREATE**

10.5.2 Creating a Subscription in Google Pub/Sub

This section describes how to create a new Subscription for a specific Topic. Please follow the steps below:

1. Go to the Topics page as documented in the previous section above.
2. Select a Topic from the list by double-clicking it.

Topics + CREATE TOPIC DELETE

Filter by topic name

<input type="checkbox"/> Topic name	Subscriptions	Labels
<input type="checkbox"/> projects/rpidev-188321/topics/MKTopic	0	None
<input type="checkbox"/> projects/rpidev-188321/topics/RPIListenerQueue2	1	None
<input type="checkbox"/> projects/rpidev-188321/topics/RPIWebCacheData	1	None

3. In the Topic Details, press Create Subscription. Complete the Subscription Name field then press Create to save.

PUBLISH MESSAGE IMPORT FROM EXPORT TO **CREATE SUBSCRIPTION** DELETE

← Create a subscription

A subscription directs messages on a topic to subscribers. Messages can be pushed to subscribers immediately, or subscribers can pull messages as needed.

Topic
projects/rpidev-188321/topics/RPIListenerQueue2

Subscription name ?
projects/rpidev-188321/subscriptions/RPIListenerQueue2Sub

Delivery Type ?
 Pull
 Push into an endpoint url ?

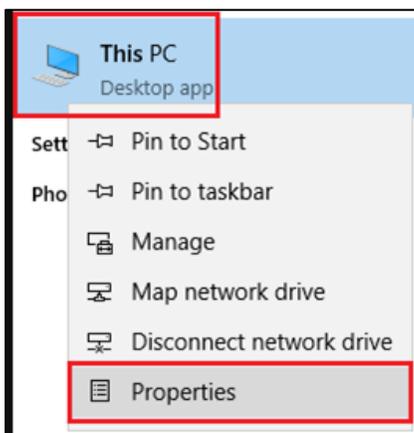
More options

Create Cancel

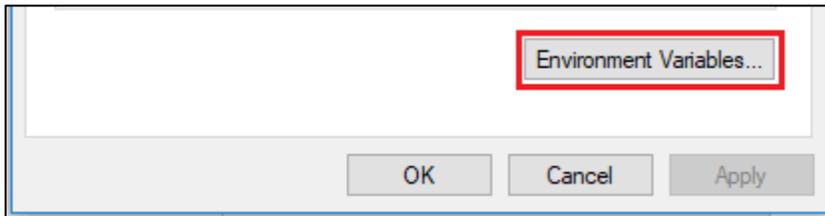
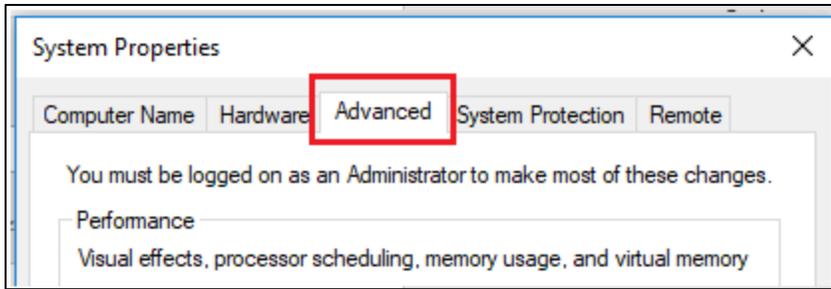
10.5.3 Setting up Windows Environment Variables

This section describes how to setup the Google service account key (in JSON format) as the Windows environment variable `GOOGLE_APPLICATION_CREDENTIALS`. Please follow the steps below:

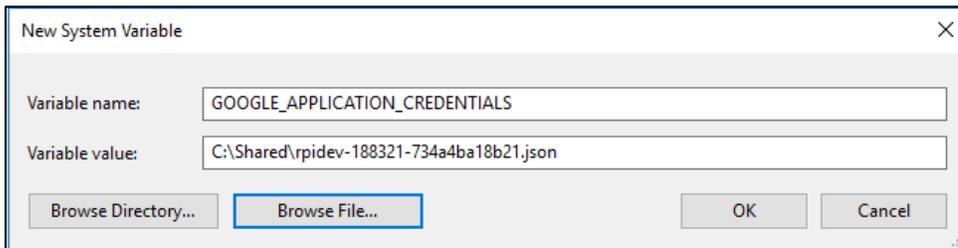
1. At the target computer, right-click 'This PC' and select Properties.



2. Go to the Advanced Tab and click Environment Variables.



3. In System Variables, press the New button. Complete the fields below, then press OK to save.

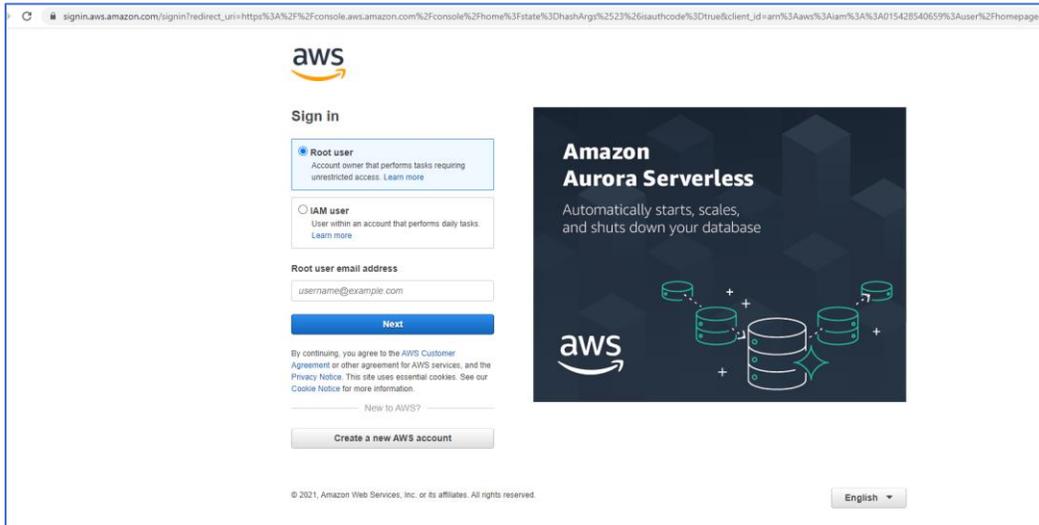


4. Restart the machine for the new setting to take effect.

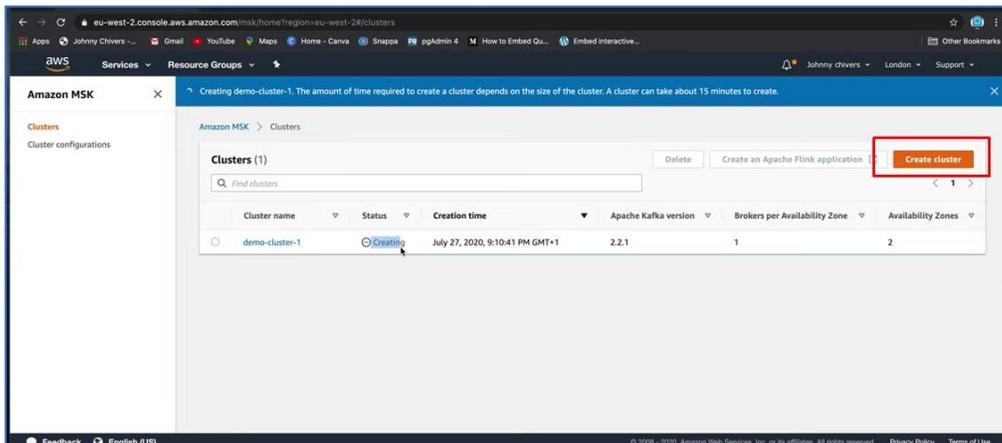
10.6 Kafka - AWS

This section describes how to set up a Kafka instance in AWS. Please follow the steps below:

3. In a web browser, navigate to <https://console.aws.amazon.com>.
4. Create or log into an AWS account.



5. After signing in, navigate to **Amazon MSK** service, click on **Create cluster**, then follow the instructions provided on the page.



- Once the Cluster has been created, click on it, and then navigate to the **Client Integration Information** page to view its details. Click on the **Copy** button under the Plaintext section, then paste it into the Bootstrap servers field in the Kafka Queue Provider configuration interface in RPI.

Client integration information

Bootstrap servers

A list of host/port pairs for establishing the initial connection to the Kafka cluster. Use this property in your Kafka producer or consumer configuration. [Learn more](#)

TLS

0 kafka-0229y-c3.kafka.eu-central-1.amazonaws.com:9092,b-
1 kafka-0229y-c3.kafka.eu-central-1.amazonaws.com:9092,b-
2 kafka-0229y-c3.kafka.eu-central-1.amazonaws.com:9092 Copy

Plaintext

0 kafka-0229y-c3.kafka.eu-central-1.amazonaws.com:9092,b-
1 kafka-0229y-c3.kafka.eu-central-1.amazonaws.com:9092,b-
2 kafka-0229y-c3.kafka.eu-central-1.amazonaws.com:9092 Copy

Zookeeper connect

Configuration value used in producer or consumer configuration. Specifies the Zookeeper connection string and lists the hosts and ports of the Zookeeper servers. Use this property value in your Kafka broker configuration. This is a list of host/port pairs used by your broker for establishing a connection to the Zookeeper node(s). [Learn more](#)

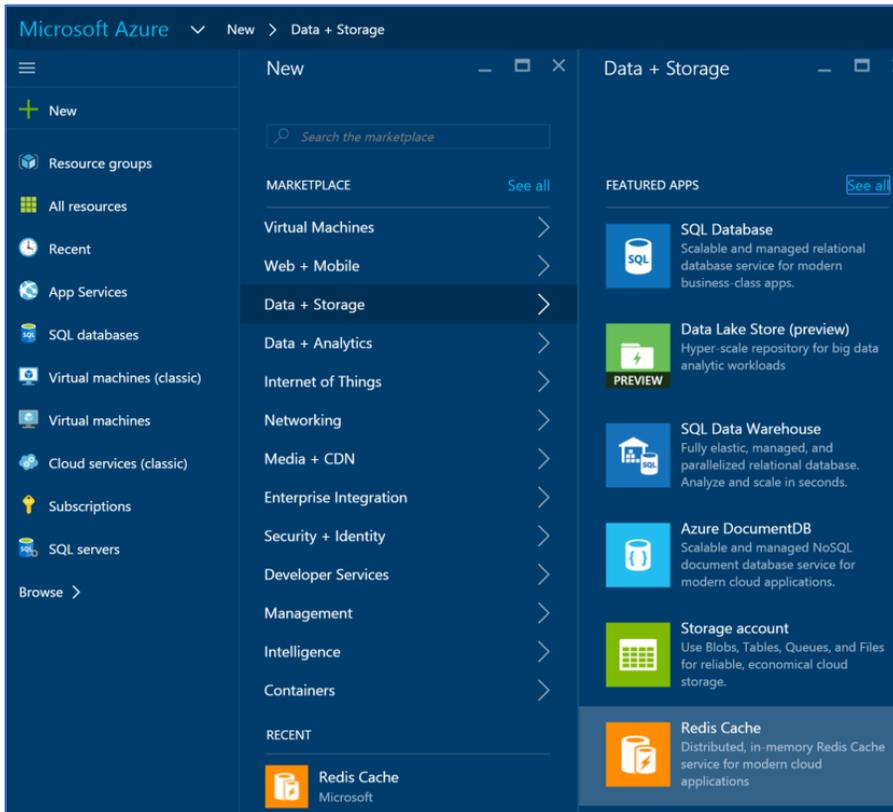
11 Cache Configuration

11.1 Azure Redis Cache

11.1.1 Azure Redis Cache provisioning

This section describes how to provision an Azure Redis Cache. Please follow the steps below:

1. In a web browser, log onto the Azure portal: <https://portal.azure.com>.
2. Click **New** > **Data + Storage** > **Redis Cache**.



- Supply the required fields for the new instance and click Create.

11.1.2 Web Processor Site Configuration

This section describes how to configure the Web Processor web site to utilize the Redis caching mechanism to support RPI realtime decisions. Please follow the steps below.

- Open the web.config file from the WebProcessor web site.
- Ensure you have uploaded these two assemblies within the Web Processor bin directory:
Redpoint.Resonance.RedisCache.dll
Sider.dll
- In the web.config file, add the following entries:
 - ```
<section name="redisCacheClient" type="Redpoint.Resonance.RedisCache.Configuration.RedisCacheClientSection, Redpoint.Resonance.RedisCache" />
```

This entry must be added within the <configSections> section.

```
<setting name="WebCacheAssembly" serializeAs="String">
<value>Redpoint.Resonance.RedisCache</value>
</setting>
<setting name="WebCacheClass" serializeAs="String">
<value>Redpoint.Resonance.RedisCache.RedisCacheHandler</value>
</setting>
```

These entries must be added within the <Redpoint.Resonance.Web.Shared.Properties.Settings> section.

- ```
<redisCacheClient><host IPAddresses="10.100.68.157:6379"/></redisCacheClient>
```

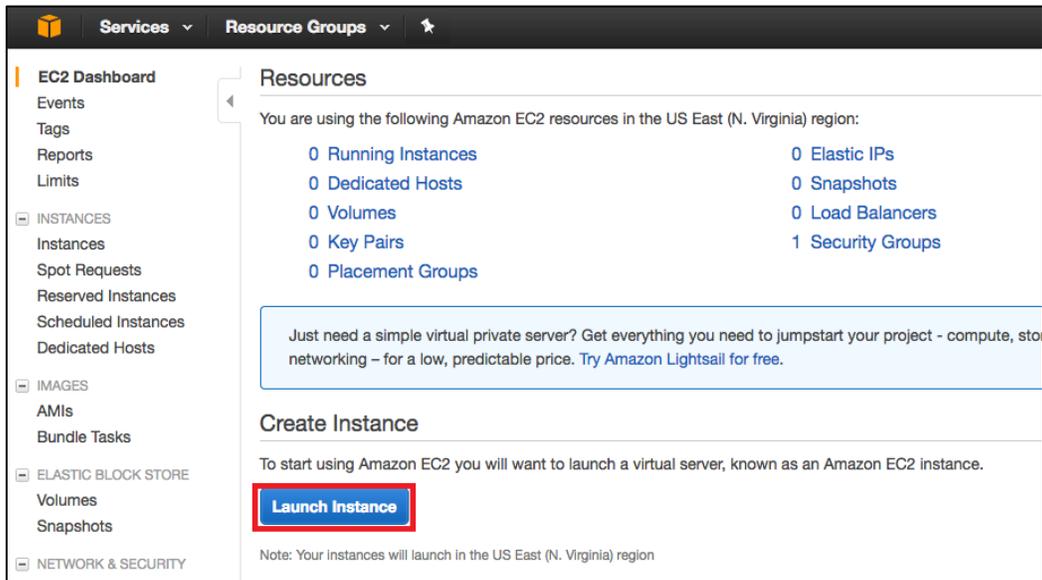
If running on a clustered Redis environment, the specified IP addresses in IPAddresses setting must be in a comma separated value. The <redisCacheClient> entry must be added within the <configuration> section.

11.2 Amazon DynamoDB Accelerator (DAX)

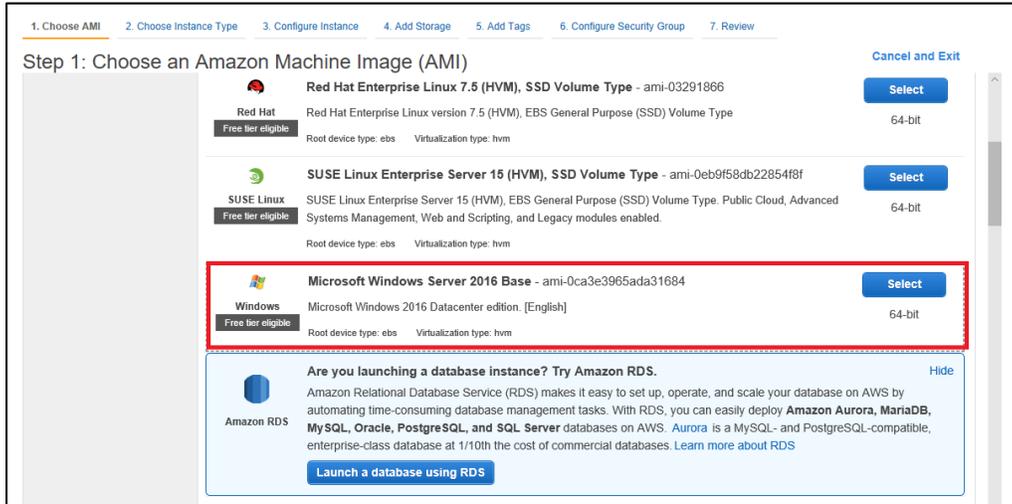
11.2.1 Launch an Amazon Instance

This section describes how to launch an Amazon EC2 instance in your default Amazon VPC. Please follow the steps below:

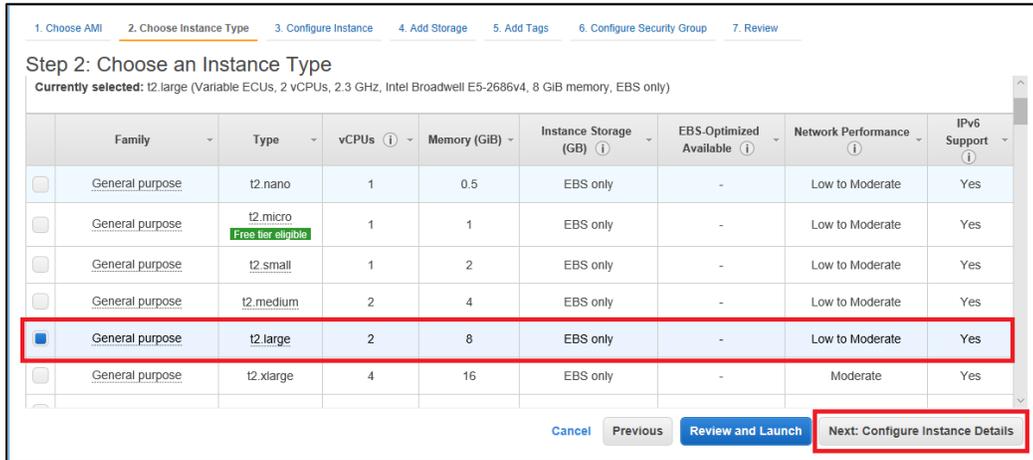
1. Sign into the AWS Management Console and open the Amazon EC2 console at <https://console.aws.amazon.com/ec2/>.
2. Press **Launch Instance**.



3. From the list of AMIs, find the **Windows Server 2016 Base** and choose **Select**.



- At the top of the list of instance types, choose t2.large. Choose Next: Configure Instance Details.



- For Network, choose your default VPC then press Next: Add Storage.

1. Choose AMI 2. Choose Instance Type 3. Configure Instance 4. Add Storage 5. Add Tags 6. Configure Security Group 7. Review

Step 3: Configure Instance Details

Configure the instance to suit your requirements. You can launch multiple instances from the same AMI, request Spot instances to take advantage of the lower pricing, assign an access management role to the instance, and more.

Number of instances [Launch into Auto Scaling Group](#)

Purchasing option Request Spot instances

Network [Create new VPC](#)

Subnet [Create new subnet](#)

Auto-assign Public IP

Placement group Add instance to placement group

Domain join directory [Create new directory](#)

IAM role [Create new IAM role](#)

Shutdown behavior

Enable termination protection Protect against accidental termination

Monitoring Enable CloudWatch detailed monitoring
[Additional charges apply.](#)

Tenancy
[Additional charges will apply for dedicated tenancy.](#)

Elastic GPU Add GPU
[Additional charges apply.](#)

T2/T3 Unlimited Enable

[Cancel](#) [Previous](#) [Review and Launch](#) [Next: Add Storage](#)

- Skip the Add Storage step by choosing **Next: Tag Instance**.
- Skip the Tag Instance step by choosing **Next: Configure Security Group**.
- In the list of security groups, choose default. This is the default security group for your VPC.
- Press **Next: Review and Launch**.

1. Choose AMI 2. Choose Instance Type 3. Configure Instance 4. Add Storage 5. Add Tags 6. Configure Security Group 7. Review

Step 6: Configure Security Group

A security group is a set of firewall rules that control the traffic for your instance. On this page, you can add rules to allow specific traffic to reach your instance. For example, if you want to set up a web server and allow Internet traffic to reach your instance, add rules that allow unrestricted access to the HTTP and HTTPS ports. You can create a new security group or select from an existing one below. [Learn more](#) about Amazon EC2 security groups.

Assign a security group: Create a new security group
 [Select an existing security group](#)

| Security Group ID | Name | Description | Actions |
|---|---------|----------------------------|-----------------------------|
| <input checked="" type="checkbox"/> sg-6e8d1a07 | default | default VPC security group | Copy to new |

Inbound rules for sg-6e8d1a07 (Selected security groups: sg-6e8d1a07)

| Type | Protocol | Port Range | Source | Description |
|-------------|----------|------------|-----------------------|-------------|
| All traffic | All | All | sg-6e8d1a07 (default) | |

[Cancel](#) [Previous](#) [Review and Launch](#)

- Review the instance and press **Launch**.
- To select an existing key pair or create a new key pair, do one of the following:

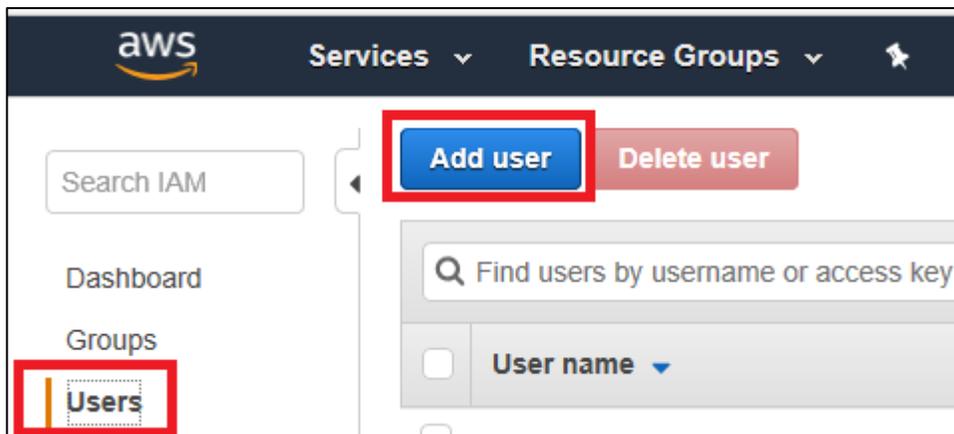
- If you do not have an Amazon EC2 key pair, choose Create a new key pair and follow the instructions. You are asked to download a private key file (.pem file); you will need this file later when you log in to your Amazon EC2 instance.
- If you already have an existing Amazon EC2 key pair, go to Select a key pair and choose your key pair from the list. You must have the private key file (.pem file) available in order to log in to your Amazon EC2 instance.

12. When you have configured your key pair, choose Launch Instances.

11.2.2 Create an IAM and User Policy

This section describes how to create an IAM user with a policy that grants access to your Amazon DynamoDB Accelerator (DAX) cluster and to DynamoDB. Please follow the steps below:

1. Open the IAM console at <https://console.aws.amazon.com/iam/>.
2. In the navigation pane, choose **Users**.
3. Choose **Add user**.



4. Input the **User name** and choose **Pragmatic access**.
5. Press **Next: Permission**.

Add user 1 2 3 4

Set user details

You can add multiple users at once with the same access type and permissions. [Learn more](#)

User name* rom

[Add another user](#)

Select AWS access type

Select how these users will access AWS. Access keys and autogenerated passwords are provided in the last step. [Learn more](#)

Access type* **Programmatic access**
Enables an **access key ID** and **secret access key** for the AWS API, CLI, SDK, and other development tools.

AWS Management Console access
Enables a **password** that allows users to sign-in to the AWS Management Console.

* Required [Cancel](#) [Next: Permissions](#)

- In the Set permissions page, choose **Attach existing policies directly**, and then choose **Create policy**.

Add user 1 2 3 4

▼ **Set permissions**

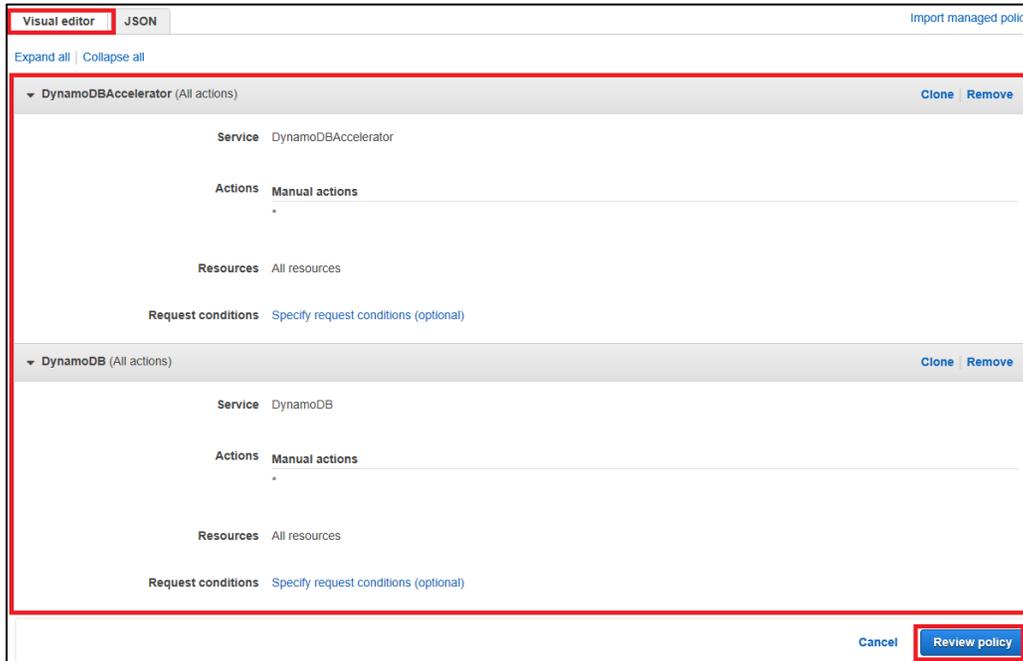
[Add user to group](#) [Copy permissions from existing user](#) [Attach existing policies directly](#)

[Create policy](#) [Refresh](#)

- In the Create Policy Page, go to the JSON tab.
- Copy the text below, then paste it to the JSON field:

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Action": [
        "dax:*"
      ],
      "Effect": "Allow",
      "Resource": [
        "*"
      ]
    },
    {
      "Action": [
        "dynamodb:*"
      ],
      "Effect": "Allow",
      "Resource": [
        "*"
      ]
    }
  ]
}
```

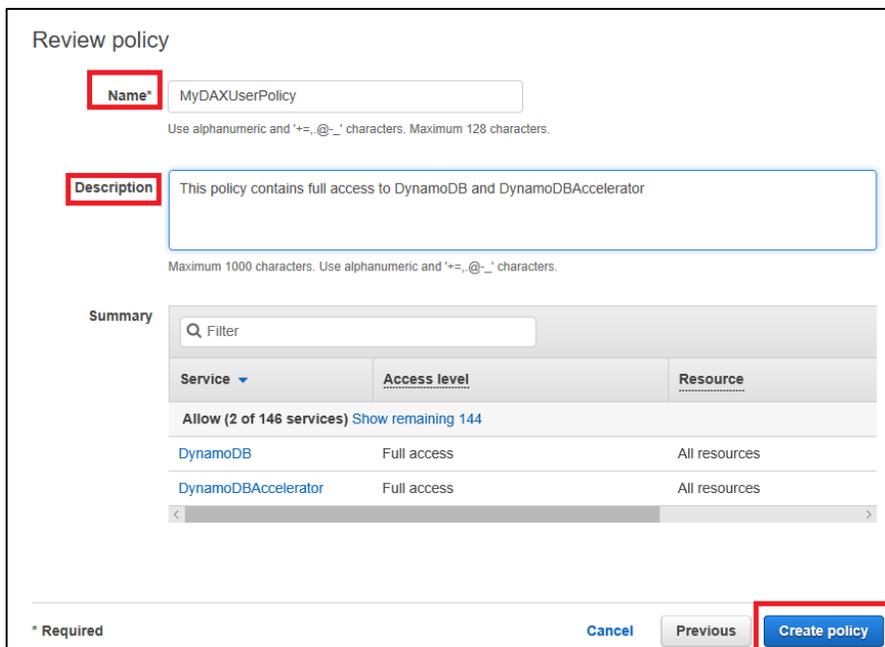
- Go to the Visual Editor tab; its contents should look like this:



10. Press **Review Policy**.

11. In the Review policy page. Input the **Policy name** and **Description**.

12. Press **Create policy** to save.



13. Press **Next Review**.

14. On the Review page, choose **Create user**.

15. On the Complete page, go to the Secret access key and choose Show. After you do this, copy both the Access key ID and Secret access key. You need both identifiers the **Configure Your Amazon EC2 Instance** step, below.

11.2.3 Configure Your Amazon EC2 Instance

This section describes how to prepare your Amazon EC2 instance for use. Please follow the steps below:

1. Open the Amazon EC2 console at <https://console.aws.amazon.com/ec2/>.
2. Use the ssh command to log in to your Amazon EC2 instance, for example:

```
ssh -i my-keypair.pem ec2-user@public-dns-name
```

You will need to specify your private key file (.pem file) and the public DNS name of your instance (see the previous section). The login ID is ec2-user. No password is required.

3. After you log in to your EC2 instance, you need to configure your AWS credential. Type your AWS access key ID and secret key (see above) and set the default Region name to your current Region (in the following example, the default Region name is us-west-2).

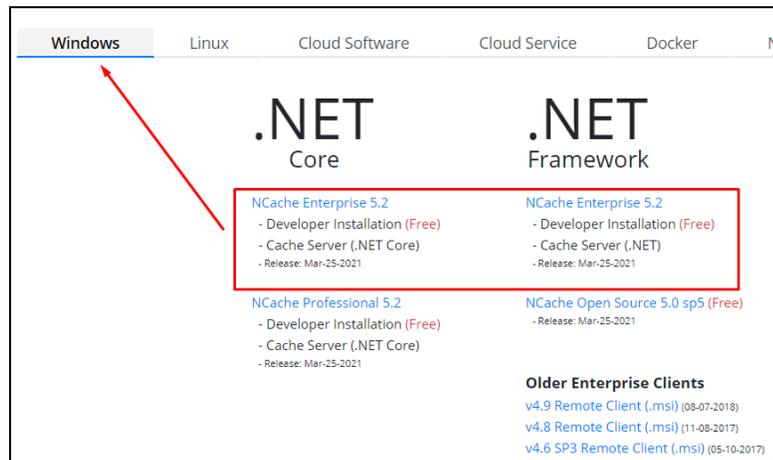
```
aws configure
AWS Access Key ID [None]: AKIAIOS[REDACTED]
AWS Secret Access Key [None]: wJa[REDACTED]
Default region name [None]: us-west-2
Default output format [None]:
```

11.3 Alachisoft NCache

11.3.1 Download and Setup of NCache

This section describes how to download and setup NCache. Please follow the steps below:

1. Navigate to <https://www.alachisoft.com/download-ncache.html>
2. Download any of the Enterprise versions for Windows.



3. Register with your work email and submit the form.

NCache
by Alachisoft

Cloud

User Registration

Already Registered?

If you have already registered with Alachisoft to download before, just enter your email address:

Work Email: * [Continue](#)

New User?

If this is your first time to download from our website, please fill out this form. Fields marked with [*] are required.

Work Email: * (License key sent here) Job Title: *

First Name: * Last Name: *

Work Phone: *

+1 (Area Code) Phone Number

Country Code

For verification purposes we may call this phone number. To avoid delay, please make sure it is correct.

Company: * Company URL: (Optional)

http://www.

[Register](#)

4. Accept the license agreement, proceed with the download, and then follow their instructions to install.

NCache
by Alachisoft

Cloud Software

Download NCache Enterprise for .NET Core (Windows)

NCache Enterprise is an online product only. Click on the 'Download' button below to download it.

Upon download, you are given an install key that enables the product to work for 60 days with all its features.

Once you purchase the product, you are given a permanent license key. Entering the permanent license key converts the product from trial to permanent.

Note: If you do not receive the install key within 15 minutes then please check your SPAM filters to make sure it hasn't blocked it. If it has, please contact sales@alachisoft.com.

| Quick Details | |
|---------------------|---|
| Version: | 5.2 |
| Date Published: | Mar-25-2021 |
| Size: | 125 MB |
| Download Link: | Download |
| Installation Guide: | NCache Installation Guide for Windows |

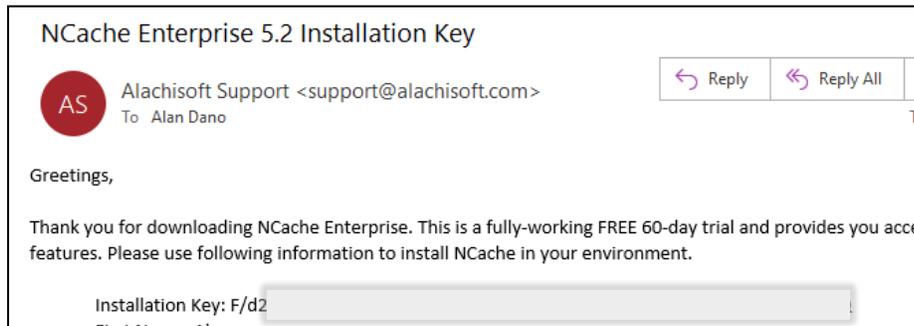
Instructions for Installing NCache

Steps for installation through .bat file

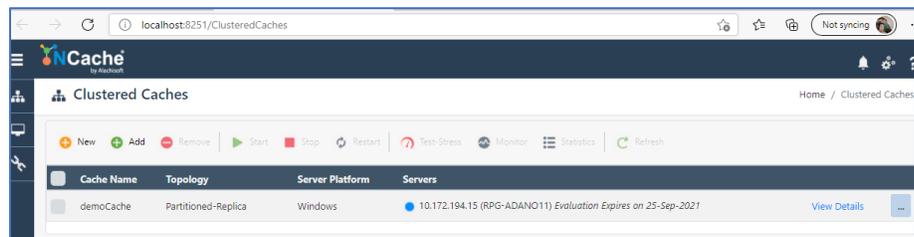
1. Log into your machine with an **Administrator** account.
2. Open a Command Prompt with **Run as Administrator** option.
3. Type and run the following command:
`msiexec /i "<Setup Path>\ncache.ent.netcore.x64.msi"`
4. Or, create a BATCH file (install_ncache.bat) and put the above line in it.
5. Right click on the BATCH file and run it through **Run as administrator** option. This will start the installer.
6. Follow the instructions on the screen to complete the installation.

Instructions for use:

5. Your installation key will be emailed to you.



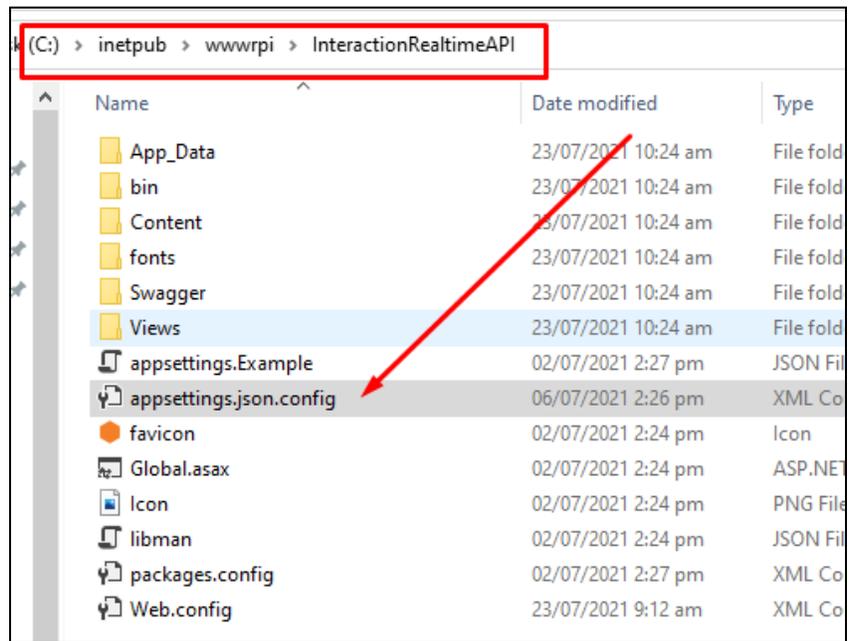
6. Open the NCache management panel at: <http://localhost:8251/> to create a new cache.



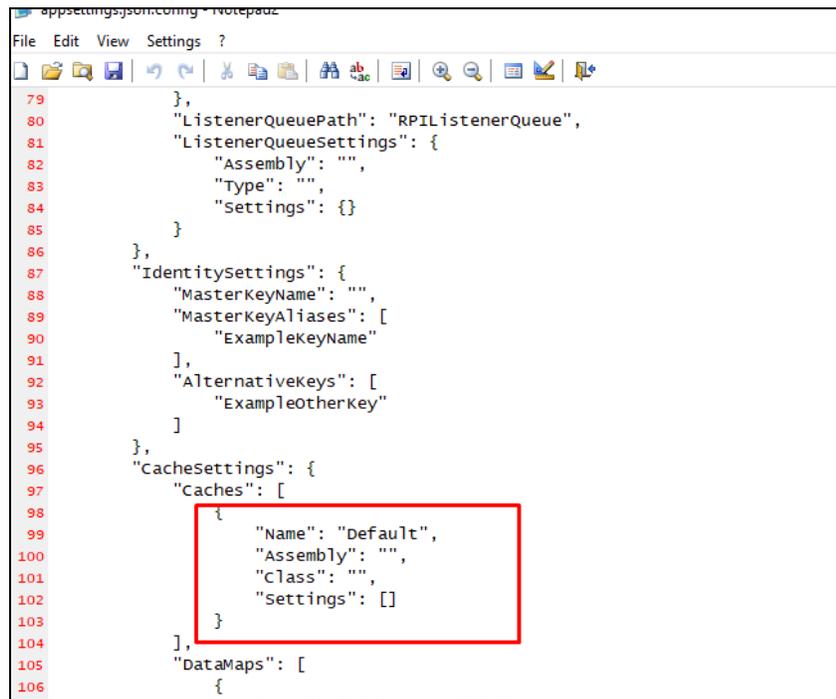
11.3.2 Configuring RPI to use NCache

This section describes how to configure RPI to use NCache. Please follow the steps below:

1. In Windows Explorer, open the “appsettings.json.config” file in a text editor such as Notepad or Notepad++. File location: C:\inetpub\wwwrpi\InteractionRealtimeAPI.



2. Find the CacheSettings section.



```
79     },
80     "ListenerQueuePath": "RPIListenerQueue",
81     "ListenerQueueSettings": {
82       "Assembly": "",
83       "Type": "",
84       "Settings": {}
85     }
86   },
87   "IdentitySettings": {
88     "MasterKeyName": "",
89     "MasterKeyAliases": [
90       "ExampleKeyName"
91     ],
92     "AlternativeKeys": [
93       "ExampleOtherKey"
94     ]
95   },
96   "CacheSettings": {
97     "Caches": [
98       {
99         "Name": "Default",
100        "Assembly": "",
101        "Class": "",
102        "Settings": []
103      }
104    ],
105    "DataMaps": [
106      {
```

3. Replace the configuration settings with the NCache settings of the cache created in step 6 of the prior section.



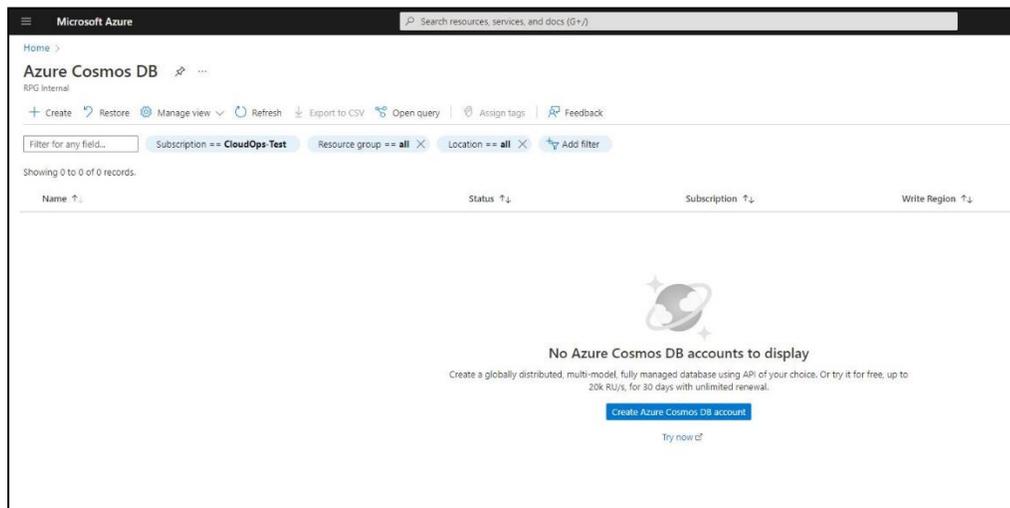
```
    "MasterKeyAliases": [
      "ExampleKeyName"
    ],
    "AlternativeKeys": [
      "ExampleOtherKey"
    ]
  },
  "CacheSettings": {
    "Caches": [
      {
        "Name": "NCache",
        "Assembly": "RedPoint.Resonance.NCache",
        "Class": "RedPoint.Resonance.NCache.NCacheHandler",
        "Settings": [
          {
            "key": "cacheID",
            "value": "demoCache"
          },
          {
            "key": "serverList",
            "value": "192.168.100.65"
          }
        ]
      }
    ],
    "DataMaps": [
      {
        "type": "Visitor Profile",
        "cache": "Default",
```

11.4 Azure CosmosDB as a Cache

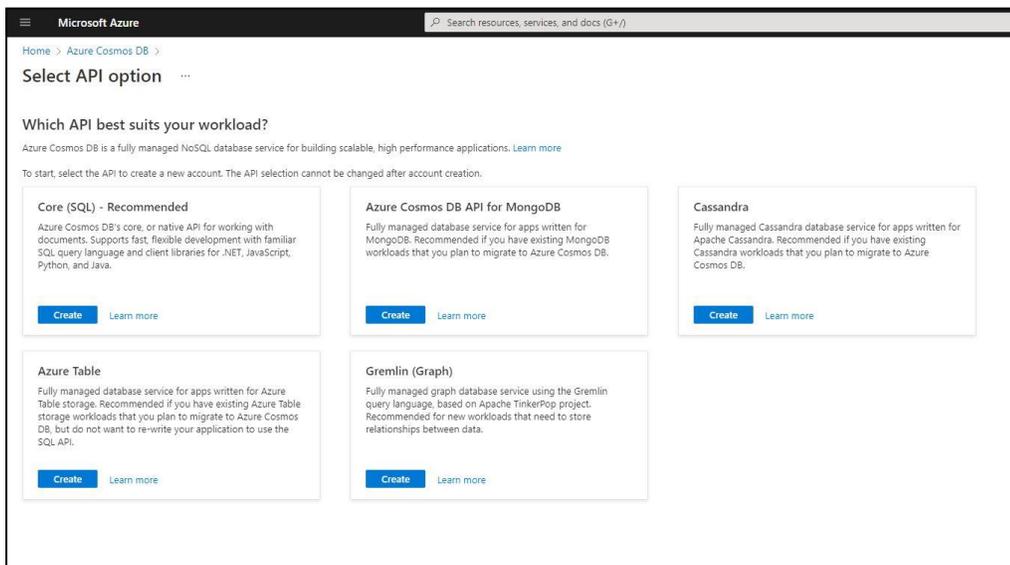
11.4.1 CosmosDB Cache Configuration

This section describes how to provision an CosmosDB Cache. Please follow the steps below:

1. Login to Azure portal by navigating to <https://portal.azure.com> on your web browser.
2. Go to Home section and find Azure **CosmosDB**



3. In the “Select API option” page, choose “Core (SQL) – Recommended.” Click **Create**.



4. Provide the required fields on the “Create Azure Cosmos DB Account – Core (SQL)” page.

The screenshot shows the 'Create Azure Cosmos DB Account - Core (SQL)' page in the Microsoft Azure portal. The page is titled 'Create Azure Cosmos DB Account - Core (SQL)' and has a breadcrumb trail: Home > Azure Cosmos DB > Select API option >. The page is divided into several sections: 'Basics', 'Global Distribution', 'Networking', 'Backup Policy', 'Encryption', 'Tags', and 'Review + create'. The 'Project Details' section is currently active, and it contains the following fields and options:

- Subscription ***: CloudOps-Test
- Resource Group ***: (New) Cosmos-Test
- Instance Details**
 - Account Name ***: cosmossql
 - Location ***: (US) East US 2
 - Capacity mode**: Provisioned throughput Serverless
- Apply Free Tier Discount**: Apply Do Not Apply
- Limit total account throughput**: Limit the total amount of throughput that can be provisioned on this account

At the bottom of the page, there are three buttons: 'Review + create' (highlighted in blue), 'Previous', and 'Next: Global Distribution'.

5. Specify the Global Distribution settings of the database to be created. Click “Next: Networking” button.

The screenshot shows the 'Create Azure Cosmos DB Account - Core (SQL)' page in the Microsoft Azure portal, specifically the 'Global Distribution' section. The page is titled 'Create Azure Cosmos DB Account - Core (SQL)' and has a breadcrumb trail: Home > Azure Cosmos DB > Select API option >. The page is divided into several sections: 'Basics', 'Global Distribution', 'Networking', 'Backup Policy', 'Encryption', 'Tags', and 'Review + create'. The 'Global Distribution' section is currently active, and it contains the following settings:

- Global Distribution**: Configure global distribution and regional settings for your account. You can also change these settings after the account is created.
- Geo-Redundancy**: Enable Disable
- Multi-region Writes**: Enable Disable
- Availability Zones**: Enable Disable

At the bottom of the page, there are three buttons: 'Review + create' (highlighted in blue), 'Previous', and 'Next: Networking' (highlighted in blue).

- Specify the desired connectivity method in the Networking page. Click “Next: Backup Policy” button.

Microsoft Azure

Home > Azure Cosmos DB > Select API option >

Create Azure Cosmos DB Account - Core (SQL)

Basics Global Distribution **Networking** Backup Policy Encryption Tags Review + create

Network connectivity

You can connect to your Cosmos DB account either publicly, via public IP addresses or service endpoints, or privately, using a private endpoint.

Connectivity method *

- All networks
- Public endpoint (selected networks)
- Private endpoint

All networks will be able to access this CosmosDB account. [Learn More](#)

Review + create Previous **Next: Backup Policy**

- Specify the backup policy settings of the database to be created. Click “Next: Encryption” button.

Microsoft Azure

Home > Azure Cosmos DB > Select API option >

Create Azure Cosmos DB Account - Core (SQL)

Basics Global Distribution Networking **Backup Policy** Encryption Tags Review + create

Azure Cosmos DB provides two different backup policies. You will not be able to switch between backup policies after the account has been created. [Learn more](#) about the differences of the two backup policies and pricing details.

Backup policy Periodic Continuous

Backup interval Minute(s)

Backup retention Hour(s)

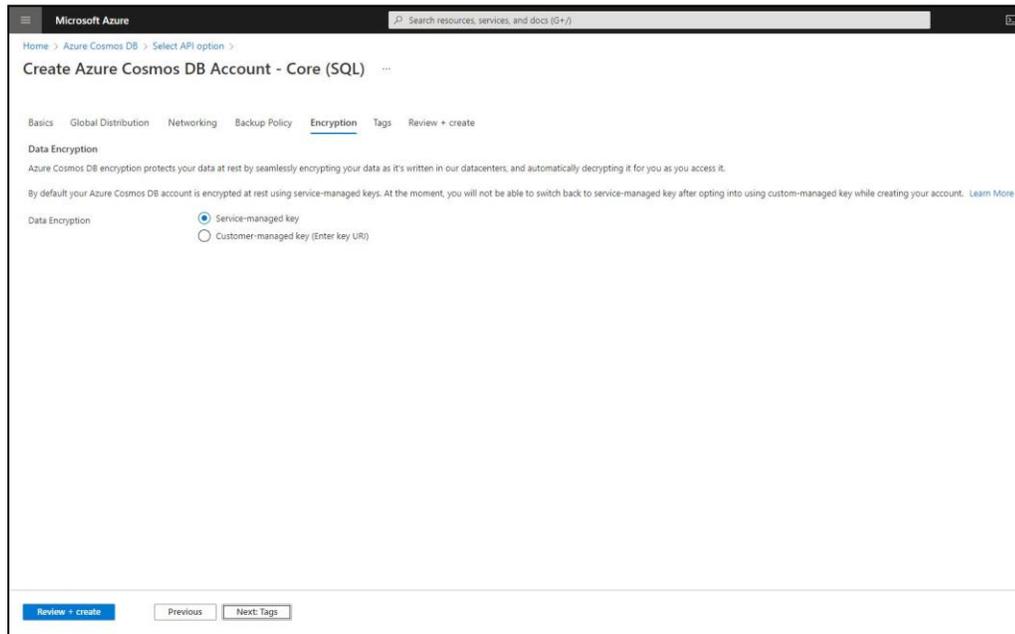
Copies of data retained

Backup storage redundancy *

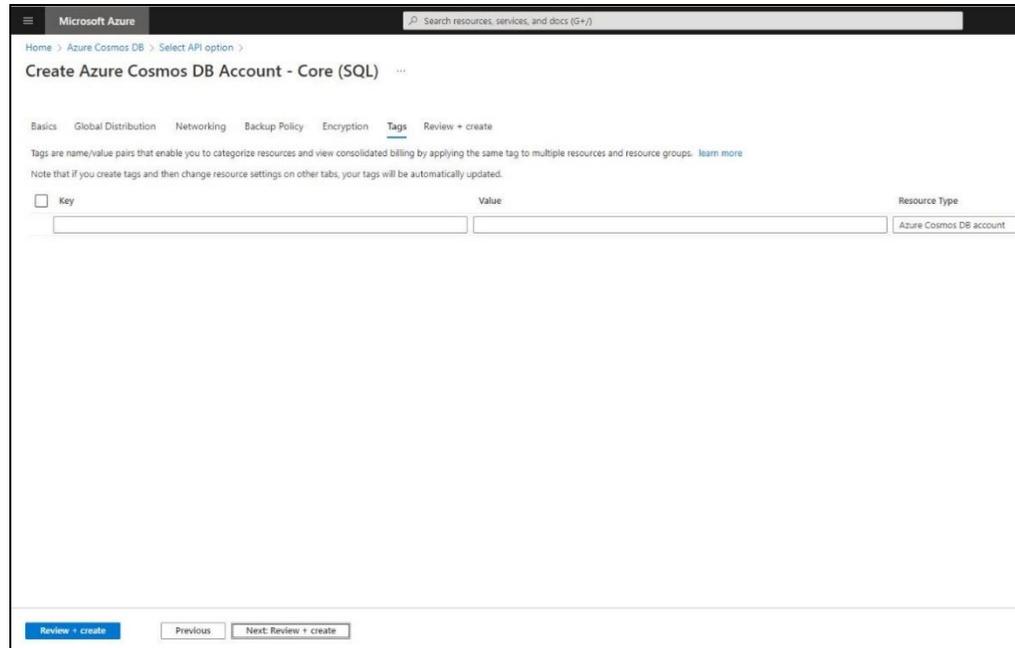
- Geo-redundant backup storage
- Zone-redundant backup storage
- Locally-redundant backup storage

Review + create Previous **Next: Encryption**

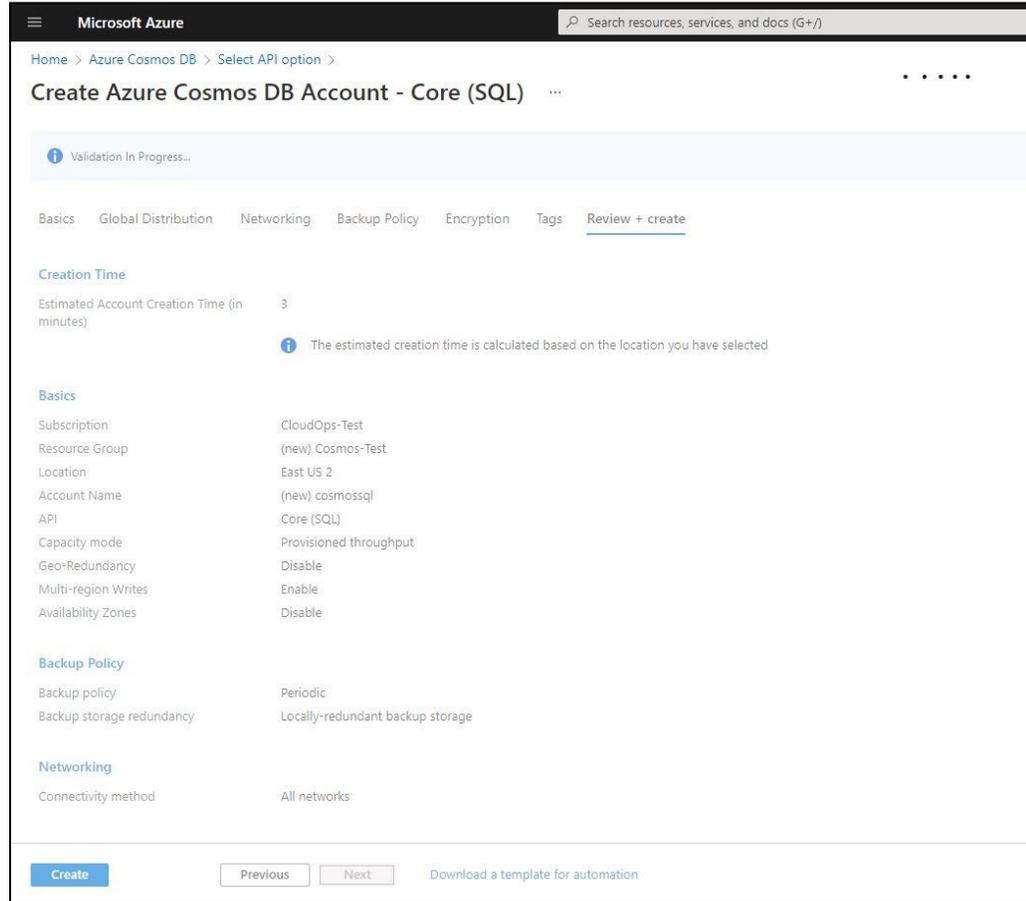
8. Choose “Service-managed key” for the encryption. Click “Next: Tags” button.



9. Add tags for the database. Leave blank if not needed. Click “Next: Review + create” button.



11. Review the settings of the database to be created. If correct, click the Create button.



12. Once the provisioning of the new CosmosDB database has completed successfully, you can find the connection string from the settings on the left menu by clicking “Keys”. The primary and secondary connection strings will be shown. These will be required for the RPI Realtime Configuration, along with the database ID. Refer to the RPI Admin guide for additional details regarding this configuration.



12 Survey Provider Configuration

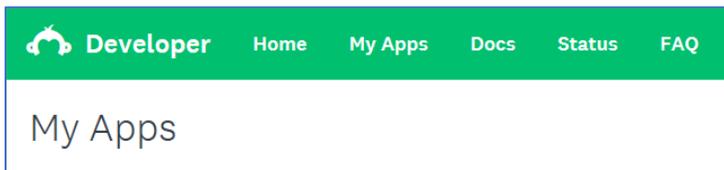
12.1 SurveyMonkey

This section outlines how to configure SurveyMonkey to use its v3 API.

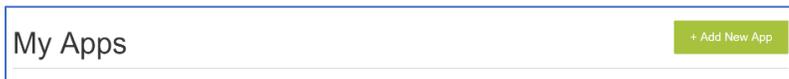
Note: Once your app has been created, any existing RPI SurveyMonkey channels must be re-authorized using the new Client ID and Secret. Re-using the same Client ID and Secret to create a new SurveyMonkey channel causes the previous channels to fail, as the previous access token will have become invalid. The recommended approach is to create a new SurveyMonkey app for the new channel.

12.1.1 Registering a SurveyMonkey App

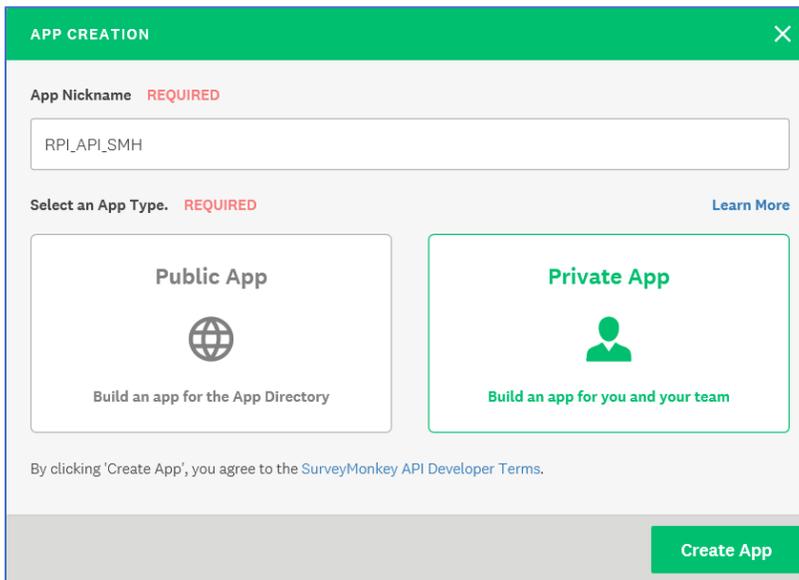
1. In a browser, browse to <https://developer.surveymonkey.com/> to login to your SurveyMonkey account.
2. Click the My Apps tab.



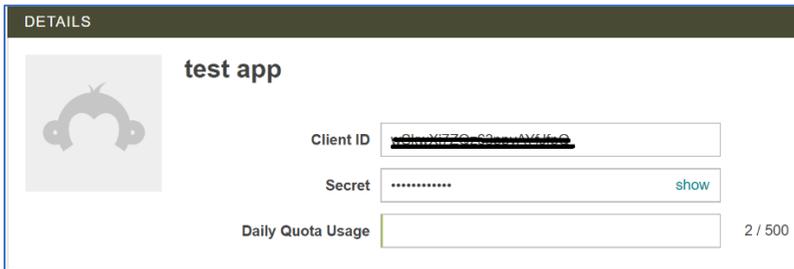
3. To create new App, click Add New App.



4. Enter the App Name and click Create App.



5. Once the App has been created, copy the Client ID and Secret values and store them securely. They are required when configure an RPI SurveyMonkey channel.



DETAILS

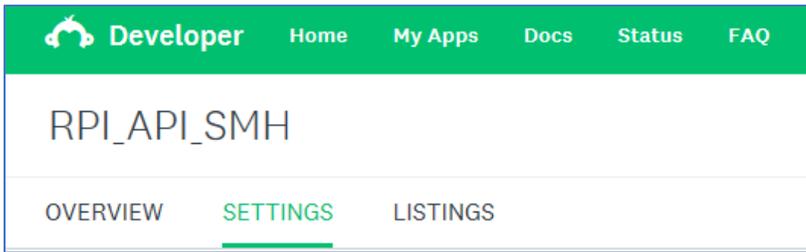
 **test app**

Client ID

Secret [show](#)

Daily Quota Usage

- In the Application section, click Settings.

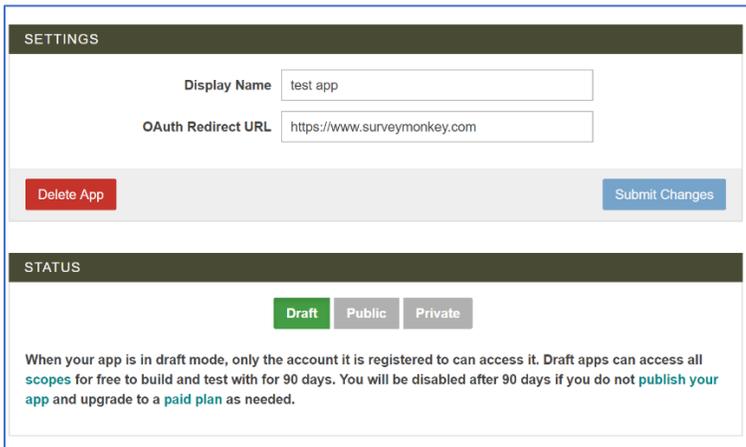


Developer Home My Apps Docs Status FAQ

RPI_API_SMH

OVERVIEW **SETTINGS** LISTINGS

- For testing purposes, make sure 'Draft' status is selected. If for production use, either 'Public' or 'Private' must be selected. Note that these require a paid account plan. Please contact SurveyMonkey support for more details.



SETTINGS

Display Name

OAuth Redirect URL

[Delete App](#) [Submit Changes](#)

STATUS

[Draft](#) [Public](#) [Private](#)

When your app is in draft mode, only the account it is registered to can access it. Draft apps can access all [scopes](#) for free to build and test with for 90 days. You will be disabled after 90 days if you do not [publish your app](#) and upgrade to a [paid plan](#) as needed.

8. Scroll down to ensure all Scopes are unlocked.

Scopes

Set the **scope** requirements for your application. Scopes allow your application to access resources on behalf of users. If a scope is required, users must approve it for OAuth to succeed. If a scope is optional, users do not need to approve it for OAuth to succeed, but your application will not be able to access resources controlled by scopes that aren't approved. If your application uses scopes that require a [paid SurveyMonkey plan](#), users will need a paid plan to use your application. [Read more about scopes.](#)

NOTE: If you change scopes for your application you will need to re-authenticate all users to access new scopes.

| | | | |
|---|---------------|--|---------------|
| <input type="checkbox"/> Create/Modify Collectors | Not Requested | <input type="checkbox"/> View Collectors | Not Requested |
| <input type="checkbox"/> Create/Modify Surveys | Not Requested | <input type="checkbox"/> View Surveys | Not Requested |
| <input type="checkbox"/> Create/Modify Webhooks | Not Requested | <input type="checkbox"/> View Webhooks | Not Requested |
| <input type="checkbox"/> View Library Assets | Not Requested | <input type="checkbox"/> Create/Modify Responses | Not Requested |
| <input type="checkbox"/> View Responses | Not Requested | <input type="checkbox"/> View Response Details | Not Requested |
| <input type="checkbox"/> Create/Modify Contacts | Not Requested | <input type="checkbox"/> View Contacts | Not Requested |
| <input type="checkbox"/> View Workgroups | Not Requested | <input type="checkbox"/> Create/Modify Workgroups | Not Requested |
| <input type="checkbox"/> View Workgroup Members | Not Requested | <input type="checkbox"/> Create/Modify Workgroup Members | Not Requested |
| <input type="checkbox"/> View Roles | Not Requested | <input type="checkbox"/> Create/Modify Roles | Not Requested |
| <input type="checkbox"/> View Workgroups Shared Resources | Not Requested | <input type="checkbox"/> Create/Modify Workgroups Shared Resources | Not Requested |
| <input type="checkbox"/> View Users | Not Requested | <input type="checkbox"/> View Groups | Not Requested |
| <input type="checkbox"/> Modify Groups | Not Requested | | |

[Update Scopes](#)

9. To unlock a scope, click the icon.
10. Click Update Scopes to save your changes.

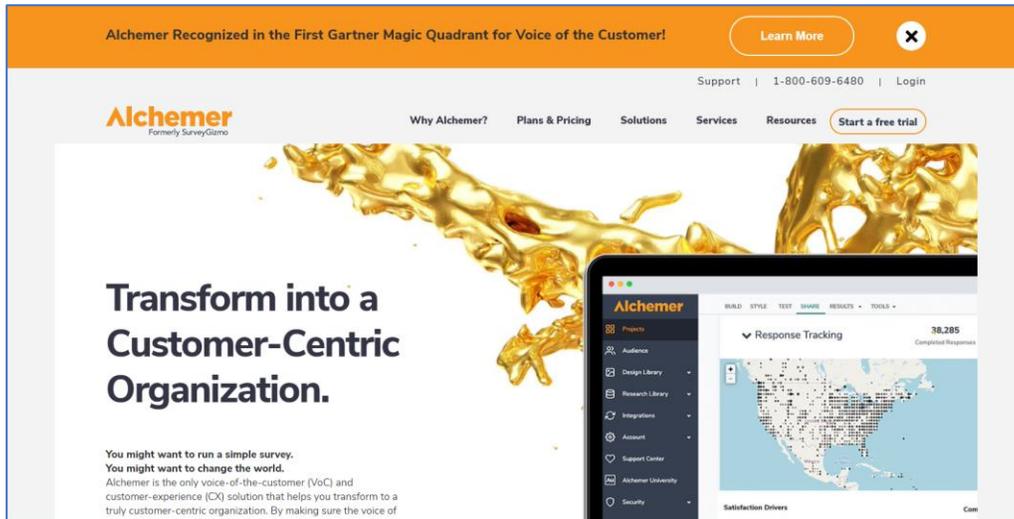
12.2 Alchemer

This section outlines how to configure Alchemer to use its v5 REST API.

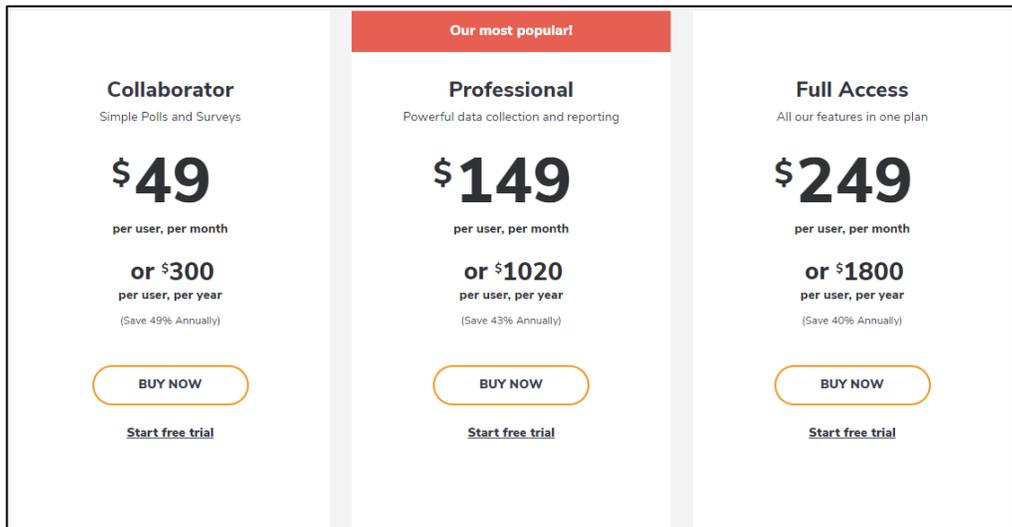
1. In a browser, browse to <https://www.alchemer.com/> to create & login to your Alchemer account.

NOTE: If an account has already been provisioned, skip to step 6 to create the API Key and API Secret

2. Click "Start a free trial".



3. Choose PROFESSIONAL and Click START FREE TRIAL.



4. Complete the required fields and click START A FREE TRIAL.

Create your account.

First name:* Last name:*

Email Address* * This will be your username Password:*

Organization:* Industry:*

Department:* Data Center:*

Stay up to date on the latest developments and best practices for creating and conducting surveys.

By accessing and using this page, you agree to our [service agreement](#) and [privacy policy](#). Your information will never be shared.*

Start a Free Trial

5. Check your email to verify your account.
6. Once the App has been created, copy the API key and API secret key and store. To get these, follow the steps below:

- Click SECURITY
- Click API ACCESS

API Access Rules Allow API access.
 Do not allow any API access.

API Access Rules Do not allow API GET calls.
 Do not allow API PUT calls.
 Do not allow API POST calls.
 Do not allow API DELETE calls.
 Do not allow access to the API using OAUTH authentication.

| API Keys | Date Created | Status | User | API Key | API Secret Key |
|----------|--------------|--------|------|---------|----------------|
|----------|--------------|--------|------|---------|----------------|

Create an API Key

API Hostname `api.alchemer.com`

Save

- Click Create an API Key and Select a User.
- Click Save.

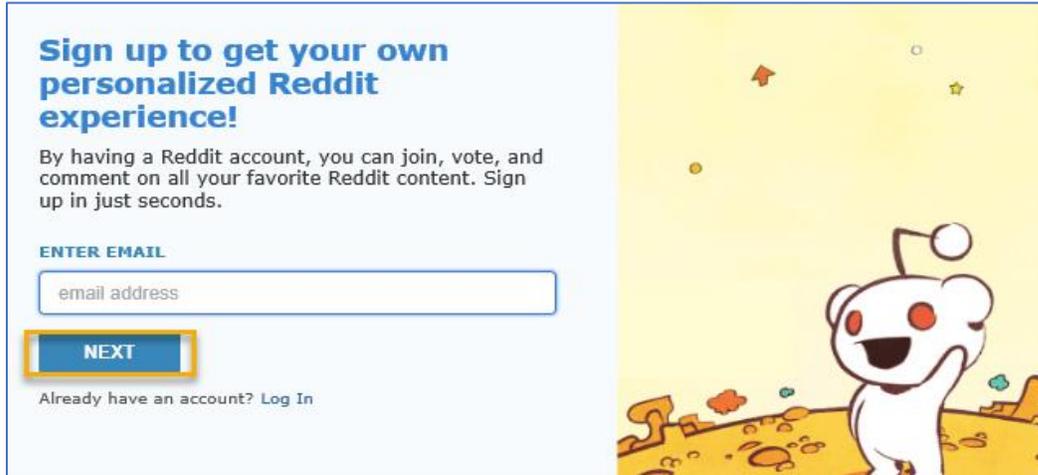
Reddit Configuration

This section describes how to create and configure Reddit for use with RPI.

1. In a browser, browse to <https://www.reddit.com/> to create an account.
2. Click Sign up.



3. Enter your Email and click Next.



4. Choose your Username & Password, and click SUBMIT.

Choose your username

Your username is how other community members will see you. This name will be used to credit you for things you share on Reddit. What should we call you?

CHOOSE USERNAME

SET PASSWORD

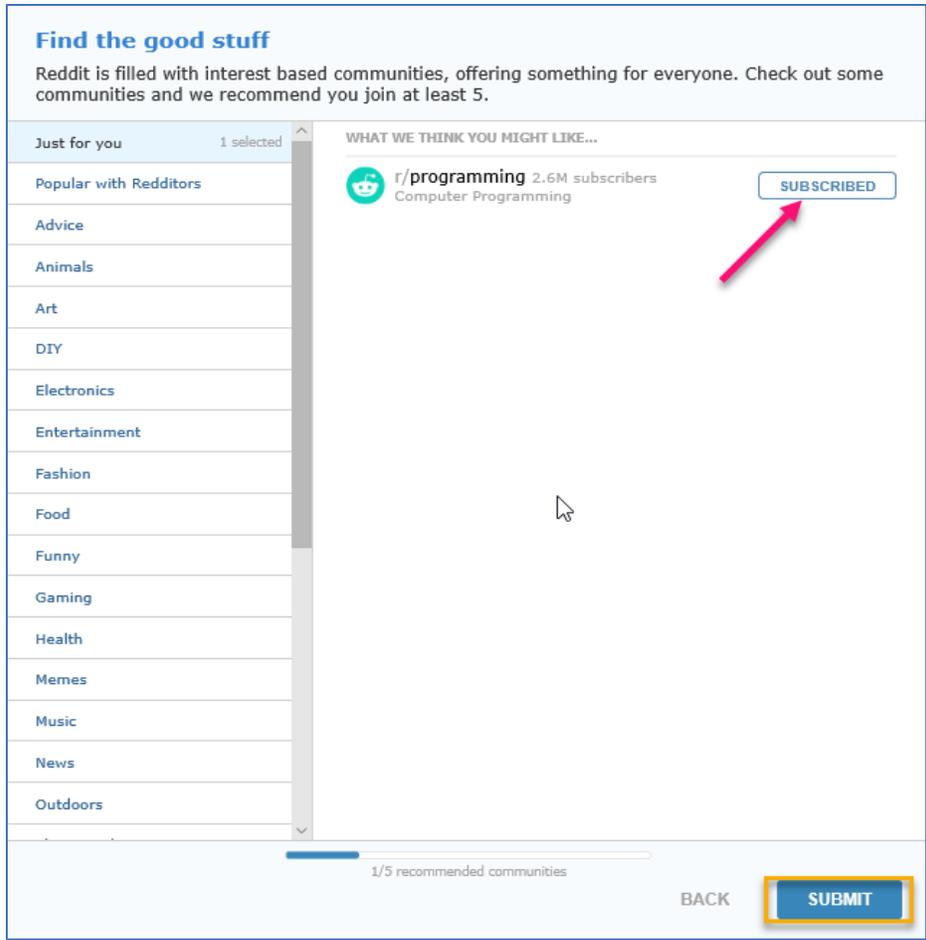
Having a hard time picking a name?
Here are some available suggestions.

[TraditionalMagazine0](#)

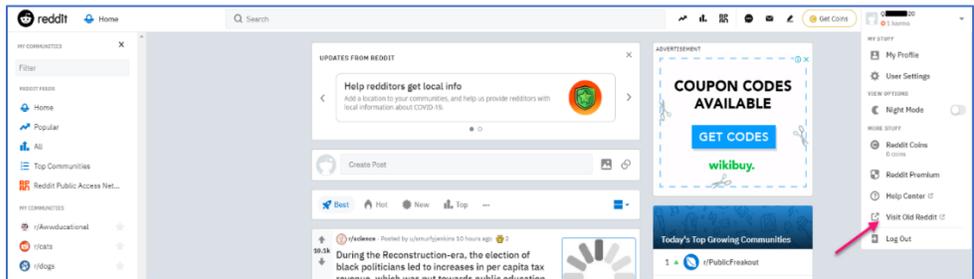
REFRESH SUGGESTIONS

[BACK](#)

5. Choose at least 5 interests, and click SUBSCRIBED and SUBMIT.



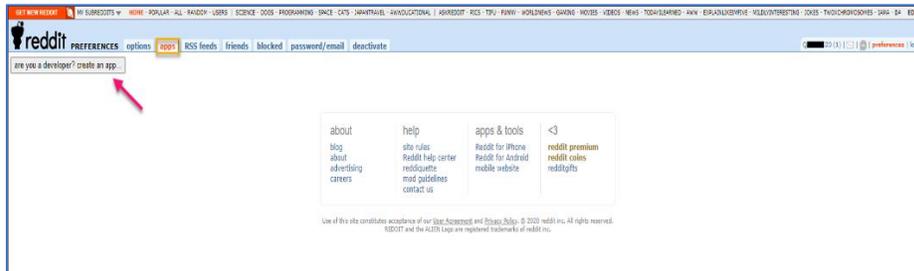
6. Check your Email to verify your account.
7. To get a Client ID & Client secret, click your username and click Visit Old Reddit.



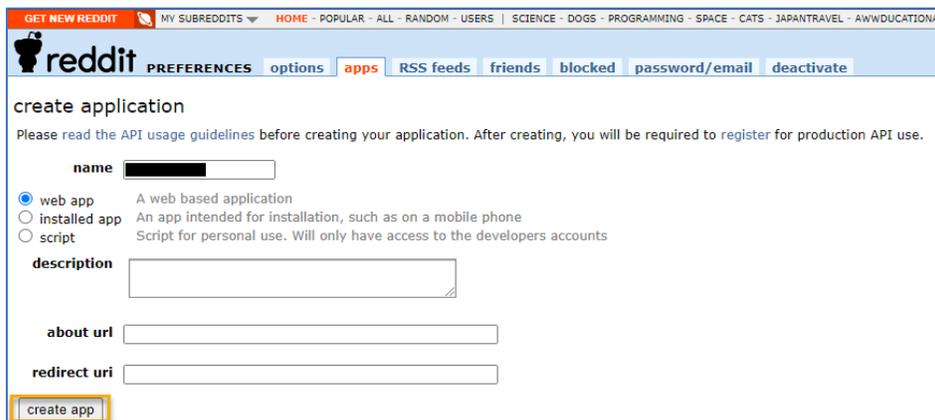
8. Click preferences.



9. Select app tab and click are you a developer? Create an app.



10. Fill out the required fields and click create app.



11. Once the App has been created, copy the Client ID, Client secret and Redirect URI values and store them.



Redpoint Global Inc.

888 Worcester Street, Suite 200, Wellesley, MA 02482

T: +1 781 725-0250

F: +1 888 259 6052

www.Redpointglobal.com

Copyright© 2022 Redpoint Inc. This document is unpublished and the foregoing notice is affixed to protect Redpoint in the event of inadvertent publication.

All rights reserved. No part of this document may be reproduced in any form, including photocopying or electronic transmission, without prior written consent of Redpoint. The information contained in this document is confidential and proprietary to Redpoint and may not be used or disclosed except as expressly authorized in writing by Redpoint.

Product names mentioned in this document may be trademarks or registered trademarks of their respective companies and are hereby acknowledged.