

WeChat–Oracle Responsys Integration - User Guide

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This document details the steps required to configure Verticurl’s WeChat Oracle Responsys Integration. Here’s a quick bird-crumb trail of what you’ll need to do when you’re doing this for the first time, with detailed write-ups below:

Create an account in Verticurl App -> Configure the Verticurl App -> Configure QR code service in the Verticurl App -> Configure the campaign in the Verticurl App -> Create a program in Oracle Responsys to update the Campaign ID in your target profiles -> Activate the Oracle Responsys Program -> Activate the Verticurl Web App Campaign

1. Verticurl App Account Creation

Create an account in the Verticurl application – this will allow you to configure QR code messages and is required for campaign activation.

Visit <https://socialapps.verticurl.com/wechatarchitecture/responsys/signup> to create an account in the Verticurl application.

Verticurl Home Signup Login

Home / Signup

Signup

Please fill out the following fields to signup:

Username *

Email *

Password *

Pod *

Select

Signup

Fill up the short form in the screenshot above to create your account.

2. Configuration Setup in Verticurl App

▪ WeChat Settings

- Navigate to Administration -> WeChat Settings.
- In WeChat settings, submit WeChat name, APP key and App secret details. These will be used by the application to communicate with the WeChat server.

Wechat Configuration

Wechat Name *

App Key *

App Secret *

Save

Request to submit Original ID under "WeChat Name" field. The Original ID can get from WeChat under Setting Account Page. Original ID value is important for tracking the follower details.

▪ Responsys Settings

- Navigate to Administration -> Responsys Settings.
- In Responsys Settings, submit Username and Password details to allow the application to access the Responsys API

Welcome gh_3b0476e15346

Responsys Settings

User Name *

Password *

Save

3. Content Library Folder Creation

To create a Content Library folder, below are the steps to create a folder:

- Go to Configuration -> Responsys Folder Menu in the Verticurl Application.
- Then click on “Create Folder” link to be directed to the Folder Creation form.

Responsys Folder

Folder Name *

Save

- In the Folder creation form, mention the name of the folder. Once you click save, the folder will automatically be created in Oracle Responsys.
- To delete any folder, can click on the Delete button against the Folder name in the Folder List.

Welcome gh_3b0476e15346

Folder List

Create Folder

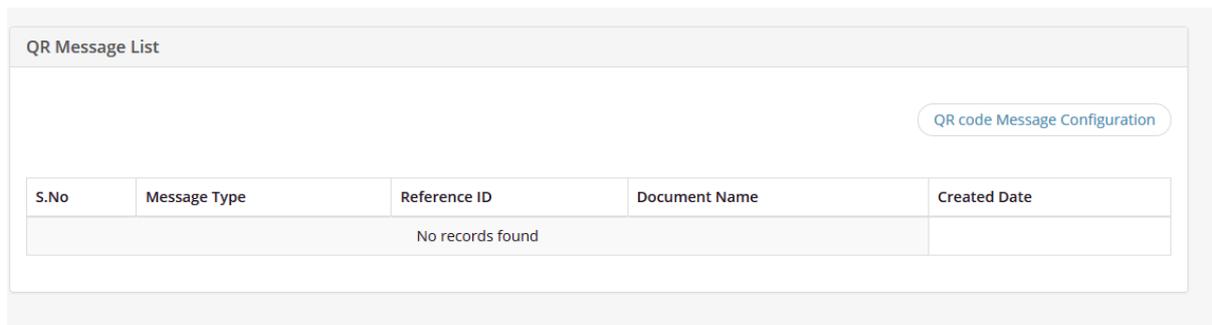
S.No	Folder Name	Created Date	
1	Verticurl.LiveService	2016-07-19 04:23:28	Delete

Note: The default list of folders from the Oracle Responsys instance that the application is connected to will be populated automatically.

4. Configure QR Code Service

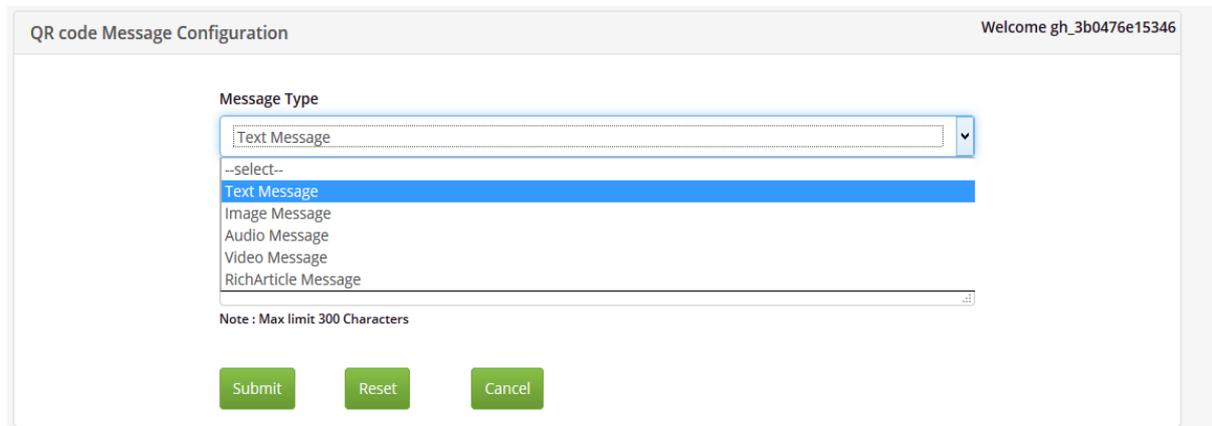
This service puts a QR code on a landing page, so you can

Step 1: Click on the Configuration -> QR Code Message Menu

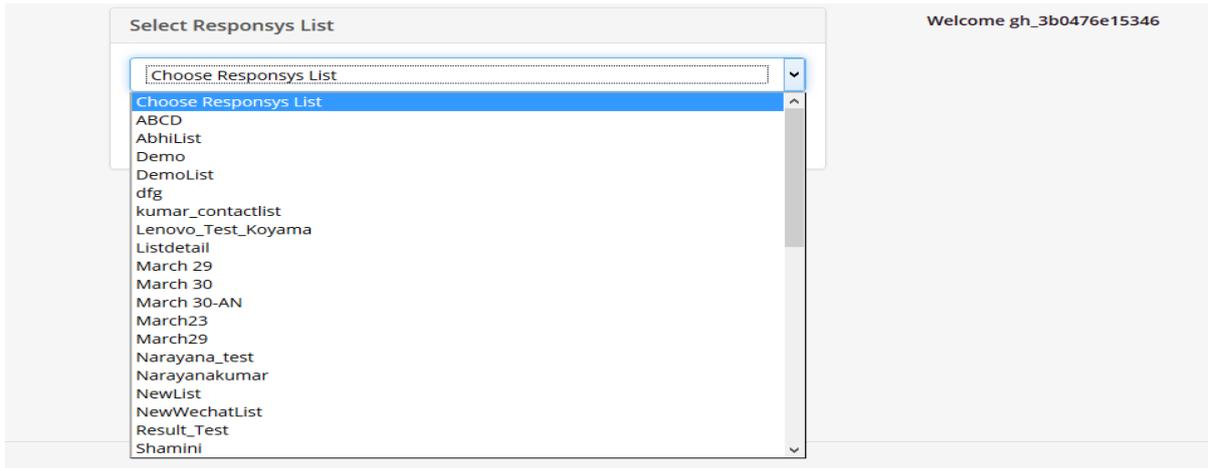


S.No	Message Type	Reference ID	Document Name	Created Date
No records found				

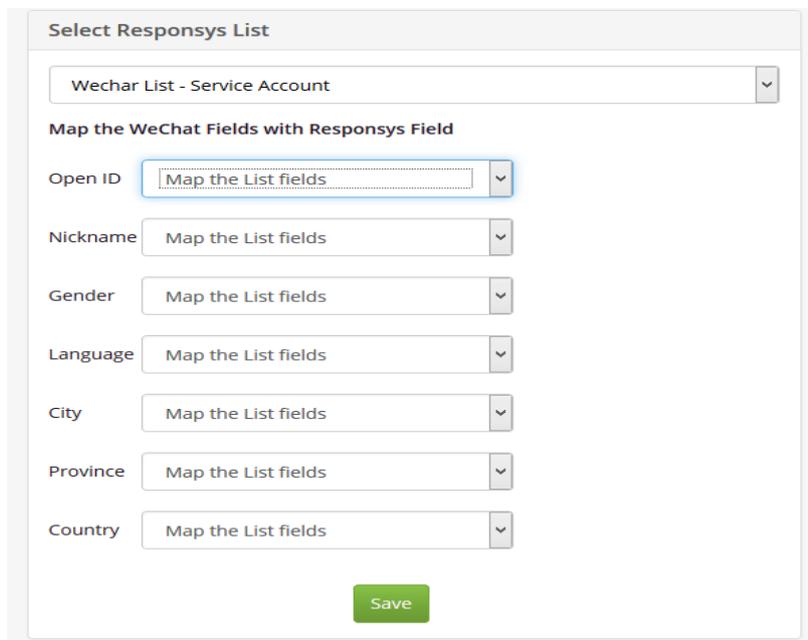
Step 2: Click on “QR Code Message Configuration” – this will take you to the form where the message for QR Module can be configured.



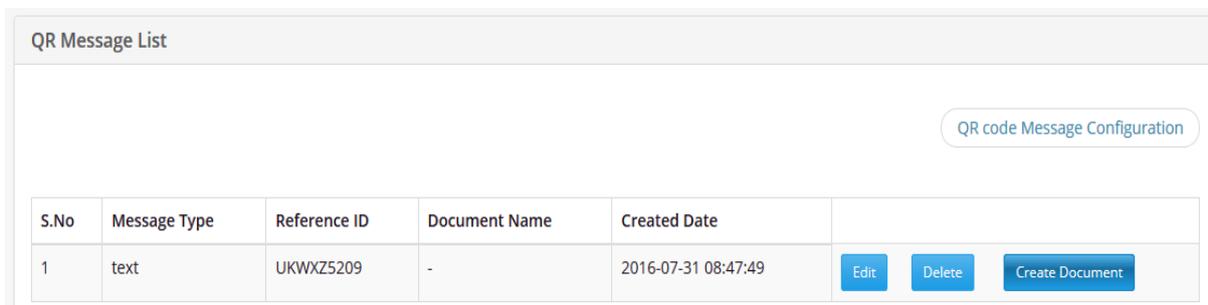
Step 3: After the message has been configured, choose the Profile List in which the list of subscribers would be stored.



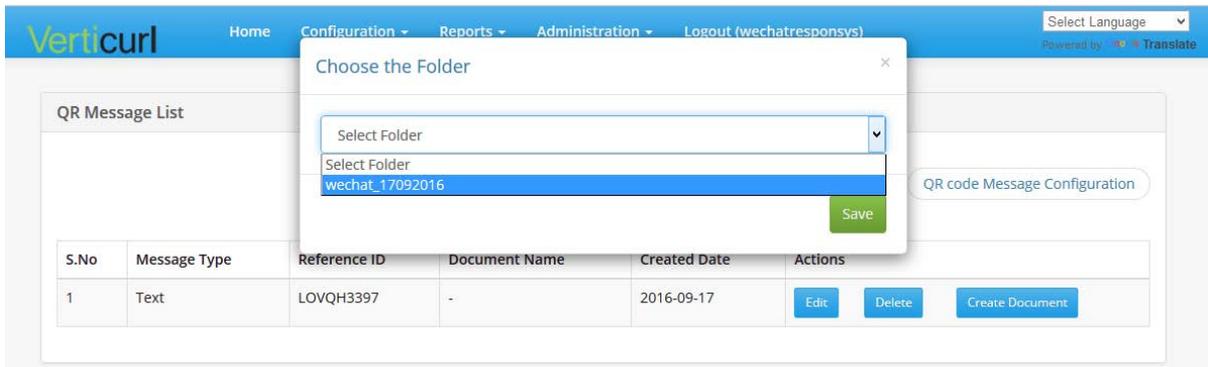
Step 4: After choosing the List, map the WeChat fields with the list of fields for the Profile List.



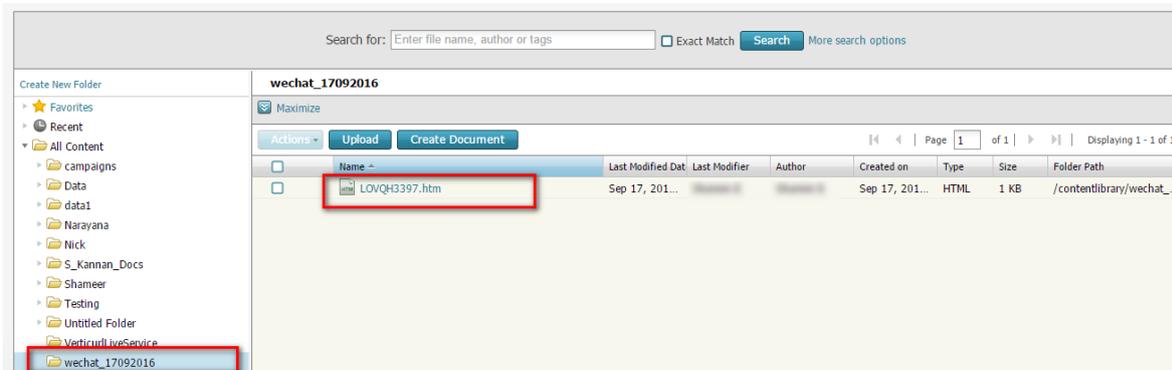
Step 5: Once mapping is done, save the configuration. The next step is to create a document for the configured message in Responsys.



Step 6: Click on the “Create Document” button, and choose the content library folder in which the created document is to be placed.

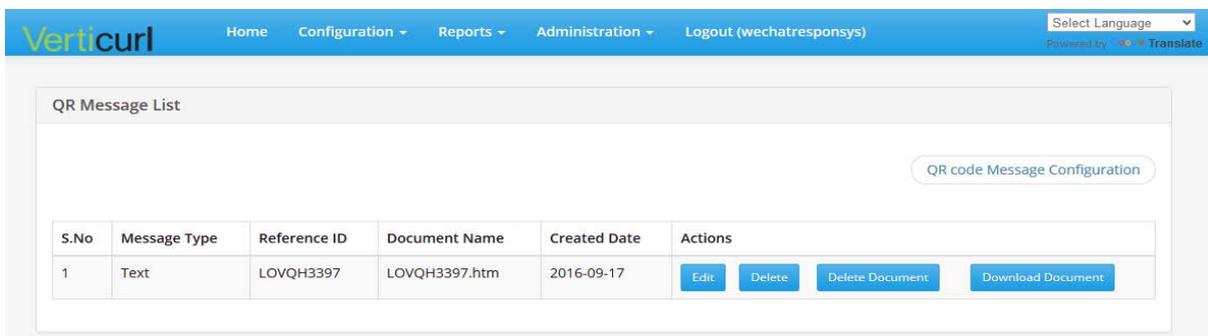


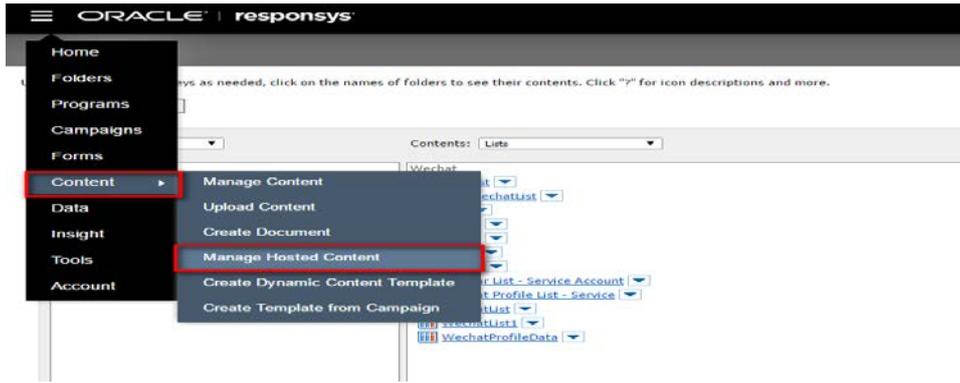
Click save – the document will be created in Oracle Responsys.



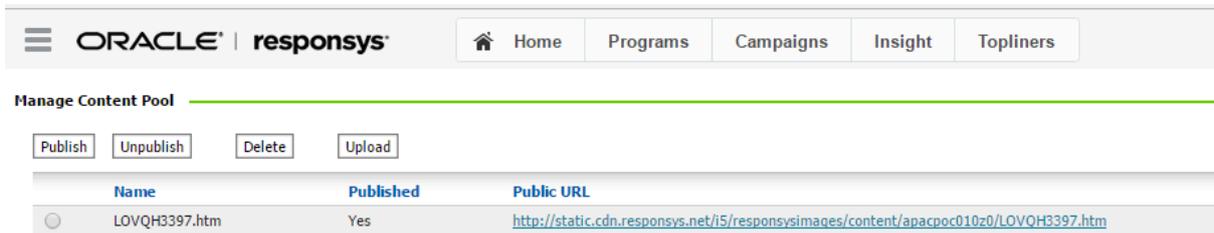
4.1 QR code service for New User

You can export the created document from content library folder or alternatively, can also download the document from the QR Message List and import it manually into Oracle Responsys. For this option, go to Oracle Responsys -> Content -> Manage Hosted Content.



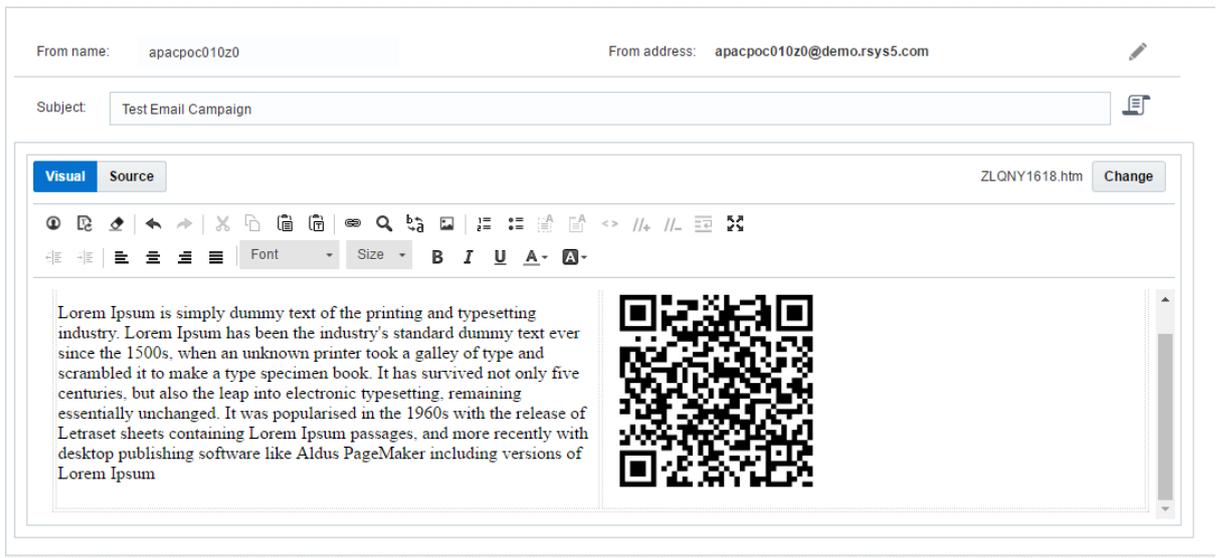


Upload the html document and publish it. When accessing the Public URL, the Landing page will be displayed with the dynamic QR code.

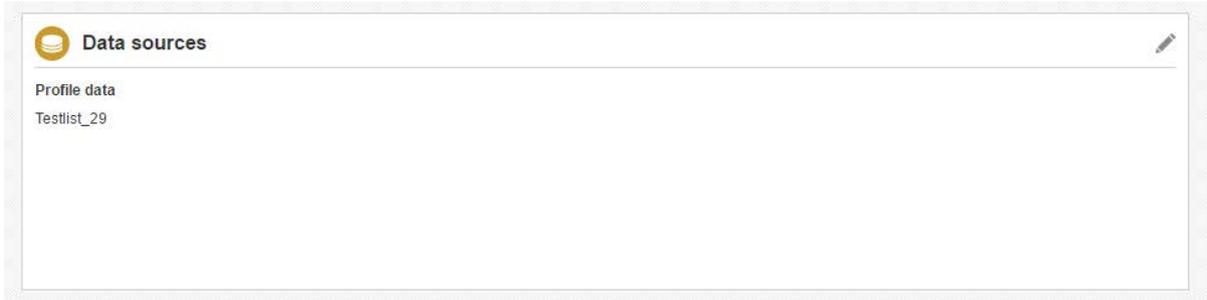


4.2 QR code service for Existing User

Import the html document from content library in an Email -> Message Designer by choosing the option 'choose from library'.



Navigate to Workbook and configure Data source with target profile list and launch the campaign.



Mail will be trigger to all users in target profile list with unique QR Code.

5. Configure Campaign

There are two parts to campaign configuration – the first is creating the actual campaign, along with the message that gets delivered to the recipients. This happens in the Verticurl App. The second part is creating a program in Oracle Responsys to update the campaign ID from the Verticurl App – this workflow will need to write the campaign ID into the CUSTOMER_ID field.

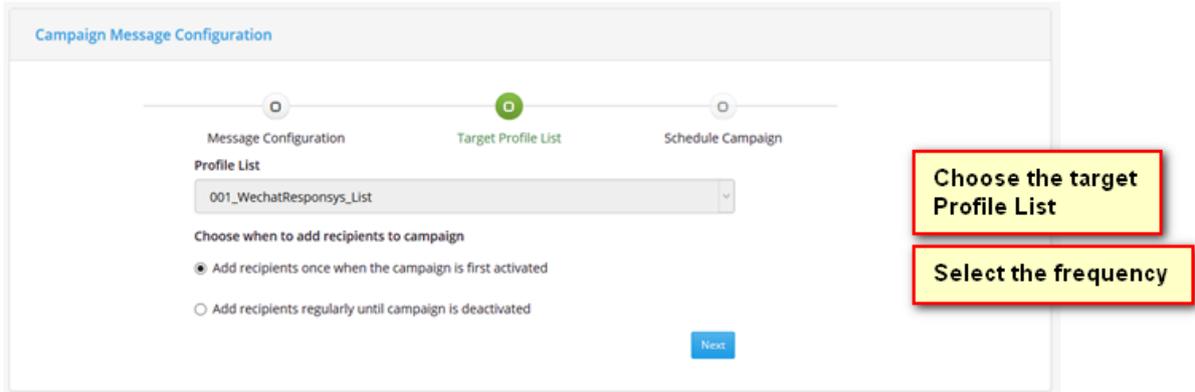
Part 1 – Create the campaign in the Verticurl App

Step 1: Go to Configuration -> Campaign Messages in Web Application.

Step 2: Click on the “Campaign Configuration” to create a new Campaign.

Step 3: Configure the Message.

Step 4: Target the Profile List



Campaign Message Configuration

Message Configuration **Target Profile List** Schedule Campaign

Profile List
001_WechatResponsys_List

Choose when to add recipients to campaign

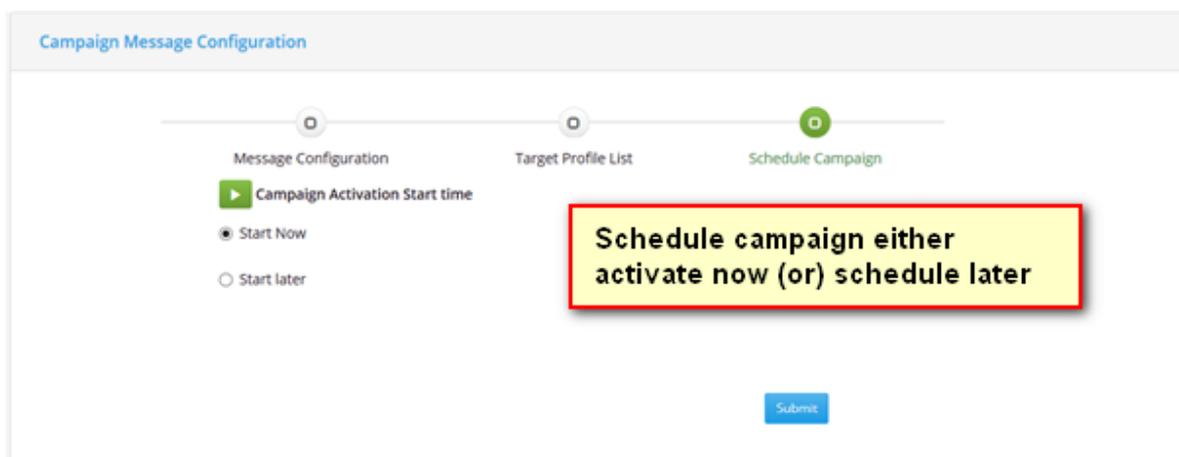
- Add recipients once when the campaign is first activated
- Add recipients regularly until campaign is deactivated

Next

Choose the target Profile List

Select the frequency

Step 5: Schedule the campaign.



Campaign Message Configuration

Message Configuration Target Profile List **Schedule Campaign**

Campaign Activation Start time

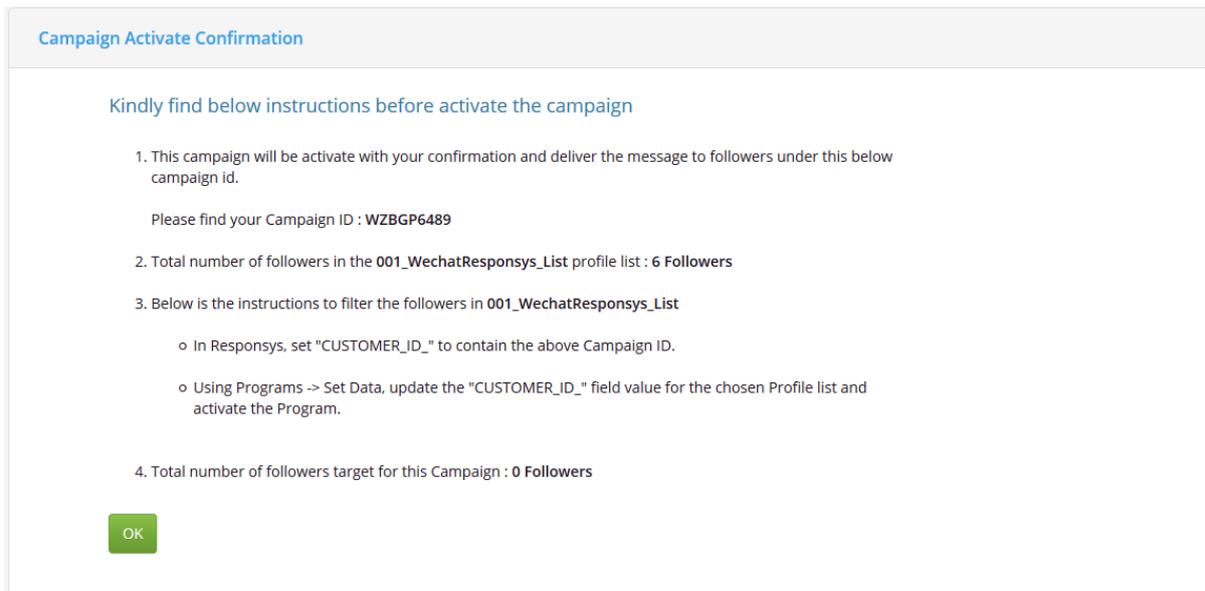
- Start Now
- Start later

Schedule campaign either activate now (or) schedule later

Submit

Step 6: Save the configuration.

Step 7: Review the campaign details before activating the campaign – this page summarizes the campaign settings for a quick final overview.



Campaign Activate Confirmation

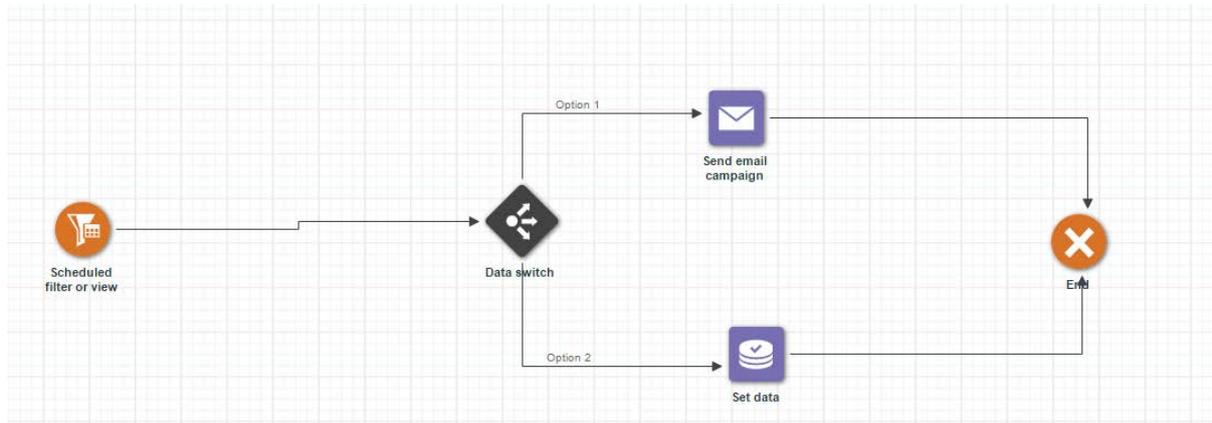
Kindly find below instructions before activate the campaign

- This campaign will be activate with your confirmation and deliver the message to followers under this below campaign id.
Please find your Campaign ID : **WZBGP6489**
- Total number of followers in the **001_WechatResponsys_List** profile list : **6 Followers**
- Below is the instructions to filter the followers in **001_WechatResponsys_List**
 - In Responsys, set "CUSTOMER_ID_" to contain the above Campaign ID.
 - Using Programs -> Set Data, update the "CUSTOMER_ID_" field value for the chosen Profile list and activate the Program.
- Total number of followers target for this Campaign : **0 Followers**

OK

Part 2 – Create a workflow in Responsys

This piece is fairly simple – the ‘Set Data’ component is used to write the Campaign ID from the Verticurl app into the CUSTOMER_ID field in Oracle Responsys. In the same workflow in the screenshot below, the ‘Set Data’ field is used only for the contacts who are intended to receive the message through WeChat.



Activate the Program in Oracle Responsys to update the customer ID field.

Step 8: Once **CUSTOMER_ID** field is updated with Campaign ID in Oracle Responsys, you can switch over to Verticurl App click on the “Refresh” button to know the number of target followers that have been picked up by the campaign.

If you’re proceed to launch right away activate the campaign in the Verticurl App.

If you’re scheduling to launch at a later time, simply go ahead to schedule the Oracle Responsys program for activation later time – in this case, **an activation of the campaign in the Verticurl App is not required, it will be done automatically.**

6. Report Services

Step 1: Go to Reports -> Message Service Report. This report will show up with statuses on the messages sent from the campaign, along with timestamps for the same.

Messages Service Report

Responsys Campaign Message Service Report gives the status of each message sends to target followers from Responsys Campaign.

Select Message Type

Text

Reports :

Name	Wechatid	Campaign ID	Type	Message	Status	Launch Date
Mingming	o-dklw08ei4CSDsj-GZ0Pb0AK3_k	AFGWT7040	text	Hi o-dklw08ei4CSDsj-GZ0Pb0AK3_k, your name is	Message send successfully	2016-08-08 15:15:27
Cynthia	o-dklw0HELaLSZNTXCyayPxXMexc	AFGWT7040	text	Hi o-dklw0HELaLSZNTXCyayPxXMexc, your name is Cynthia	Message send successfully	2016-08-08 15:15:24

Step 2: Reports -> Followers: This report will list down complete follower details.

Manage Followers

Follower Count - 66

Nick name	Gender	City	Province	Country	Photo
Celia	Female	Chaoyang	Beijing	China	
Sheep	Male			Singapore	
Anna	Female	Chaoyang	Beijing	China	
Alan	Male			Singapore	