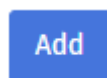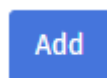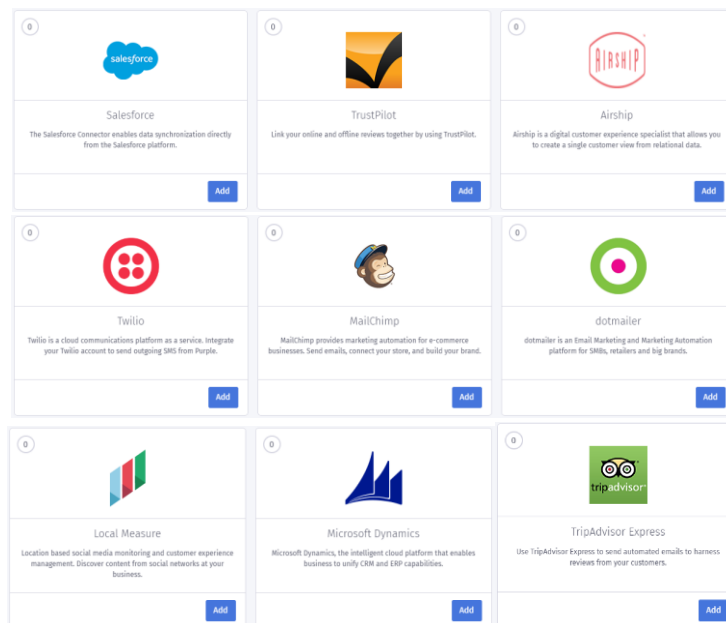## Connectors

Clicking into this area will display connectors that can be linked to the portal. Once linked to the portal certain connectors will display information in the Palette report area that you can then compare with other data.

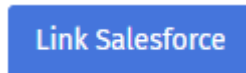We have numerous connectors available for you can link, these are:

- Salesforce
- TripAdvisor (Venue Level Only)
- Trustpilot
- MailChimp
- Local Measure
- Airship
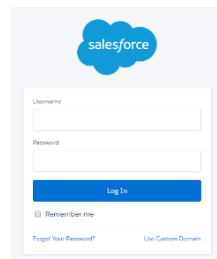- Microsoft Dynamics
- Dotmailer
- Twilio

1. To add a connector, click the **Add** button against the specific connector.

2. Each connector will have its own specific options to complete, we will look through each.

Salesforce
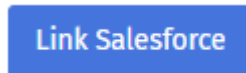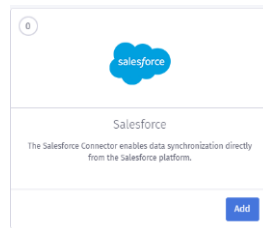
a) You will need to click the button to start the process.

b) You will be taken to the Salesforce website where you will need to login.

c) Once logged in you will be redirected back to the portal and additional options will be available

d) The first is **Connection name**, you can give the connection a specific name.

Connection name

e) Next, we have to set the **Connection Options**, selecting an option will link your Salesforce account to sync the data with the portal. The options are as follows:

- **Salesforce to portal** – This will send matching data from Salesforce to the portal.

- **Portal to Salesforce** – This will send matching data from the portal to Salesforce

- **Salesforce to/from Portal** – This will send matching data both ways.

f) Depending on the selection will determine the next options that are available to set. These are:

(1) **Contact fields: Salesforce to Portal** - Select the contact fields to be fetched from Salesforce for the identified access user in the portal and display the salesforce data into the Visitor & Devices Profile.
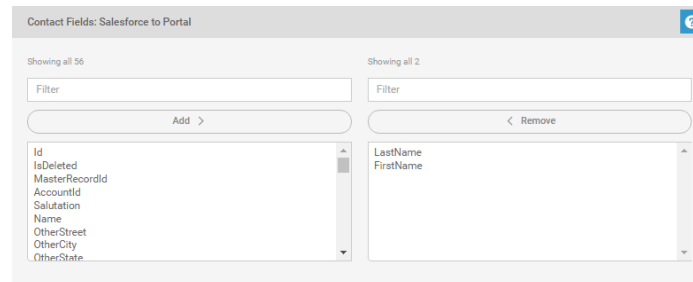
(a) Click the required field from the left-hand window.

(b) It will highlight blue, Click the 'Add' button.

(c) It will then appear within the right-hand window.

(d) You can select multiple if required by clicking and dragging.

(e) If selecting specific fields, click the ctrl button and then clicking the require fields.

(f) Above the right-hand window is a remove button, this will allow you to remove any fields no longer needed or added by mistake.

(g) There is also a filter option above both windows, typing in details will display matching result within that window.

(2) **Contact fields: Portal to Salesforce** - Specify which fields from the access user record should be mapped to the corresponding fields in Salesforce. As per the settings, only if the value for specified field is empty in Salesforce, the access user details will be updated.
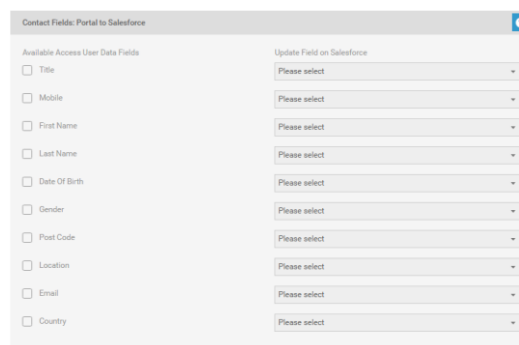
(a) This will display the fields within the portal for a contact, you can then match that data to the fields in Salesforce. This will then make sure the correct fields are updated when a match is found.

(b) All the data fields are greyed out until a tick is placed next to a field. The drop down opposite will then also become available. This will display all the Salesforce data fields available.

(c) Click the tick box and then select the appropriate Salesforce field from the drop down.

(d) You will need to do this for each portal field.

(3) **Salesforce to/from Portal** – Both the above will appear.

(4) **Salesforce: Portal Match Criteria** –You can specify criteria so user records can be matched to the contacts in Salesforce. For example, a link is established by matching the preselected lastname, email given by the access user to the lastname, email specified in Salesforce contacts. This is a mandatory area that must be completed, the first rule is automatically set and this uses the Last name field. The second rule will default to email but you can select alternatives from the drop-down list as required. You must select an option and you add a third rule if needed.
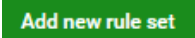

(a) Clicking the drop down will display the following options to select:

- Email
- First Name
- Last Name
- Date of Birth
- Mobile Number
- Post Code
- Location

(b) The next drop down has only one option available and that is **Equals.**

(c) The options in the last drop down will be determined by what is selected in the first drop down but will be specific fields from Salesforce that could match the initial selection.

(d) If another rule is needed, click the [Add new rule set] button and follow the above instructions but only a total of three can be created.

g) On the right of the screen is the **Scope**, depending on the level of the login will determine what scope is available. The scope will determine at what level the palette will be displayed for this connector.

- **Customer level** – This will display the customer, groups and all venues. With the ability to select each level.

- **Group level** – This will display the selected group and the venues within that group.

- **Venue level** – Just this specific venue.

h) Once the scope is selected and the other details have been added, the [Save] button will become available. If information is missing the save button will remain Grey and you will not be possible to save.

i) Once saved you will be taken back to the Connectors area and a 1 will appear in the top right of the Salesforce connector.

j) This connector is now live and all data pulled from Salesforce will be displayed and is accessible in 'Visitors and Devices' under each specific users profile.
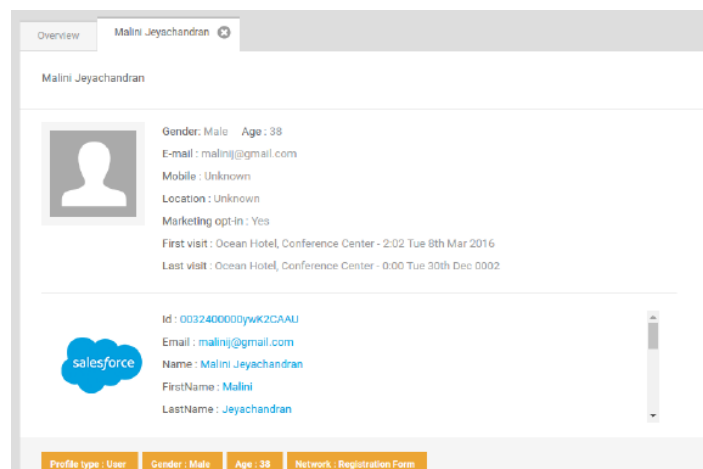
k) You can unlink Salesforce at any time by clicking the [Unlink Salesforce] button.

TripAdvisor
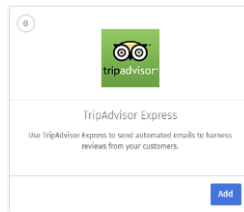
a) This connector works slightly differently to the other connectors as no information is displayed within the Palette. When setup, the customer will receive an email 48 hours after their visit to the venue. It will ask them to leave a review of their visit

b) Within this connector is a guide explaining what you need to do to get the connection made between TripAdvisor and the portal.

c) You will need to give the Connector a name.

d) You will also need to add the Unique TripAdvisor URL.

e) On the right of the screen is the Scope, depending on the level of the login will determine what scope is available. The scope will determine at what level the palette will be displayed for this connector.

- **Customer level** – This will display the customer, groups and all venues. With the ability to select each level.

- **Group level** – This will display the selected group and the venues within that group.

- **Venue level** – Just this specific venue.

f) Once the scope is selected and the other details have been added, the button will become available. If information is missing the save button will remain Grey and you will not be possible to save.

g) Once saved you will be taken back to the Connectors area and a 1 will appear in the top right of the Trip Advisor connector. This connector is now live and can be turned on within the Palette report.

h) On the Trip Advisor website, you will see either of the following screens depending on the progress of the setup.
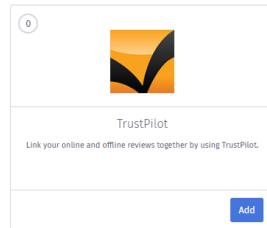
Setup not yet completed by Trip Advisor.
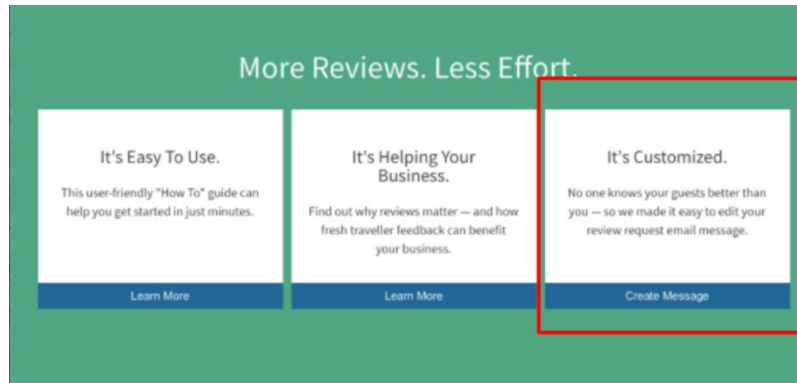
Setup complete
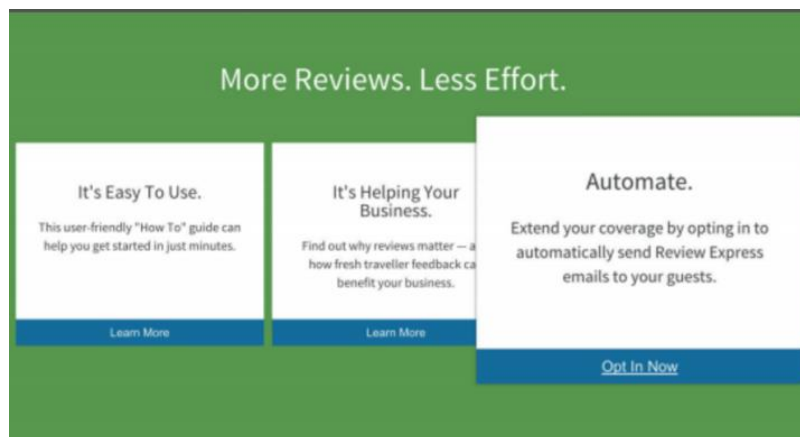
Trust Pilot

a) This connector works the same as TripAdvisor as again no information is displayed within the Palette. When setup, the customer will receive an email 24 hours after their visit to the venue. It will ask them to leave a review of their visit

b) Within the connector is a guide explaining in detail how to obtain the required information to complete the setup.

c) You will need to give the Connector a name.

Connection name

d) Next enter your TrustPilot domain.

Enter your TrustPilot domain

e) Now enter your TrustPilot encryption key

Enter your TrustPilot encryption key

f) Finally enter your TrustPilot authentication key

Enter your TrustPilot authentication key

g) On the right of the screen is the Scope, depending on the level of the login will determine what scope is available. The scope will determine at what level the palette will be displayed for this connector.

- **Customer level** – This will display the customer, groups and all venues. With the ability to   select each level.

- **Group level** – This will display the selected group and the venues within that group.

- **Venue level** – Just this specific venue.

h) Once the scope is selected and the other details have been added, the button will become available. If information is missing the save button will remain Grey and you will not be possible to save.

Once saved you will be taken back to the Connectors area and a 1 will appear in the top right of the TrustPilot connector. This connector is now live.

MailChimp
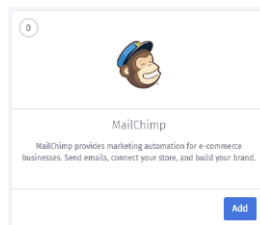
a) The MailChimp connector can be set up at customer level or venue level and will push users' data into MailChimp once they have authenticated into your WiFi.

b) Within the connector is a guide explaining in detail how to obtain the required information to complete the setup.

c) You will need to give the Connector a name.

Connector Name

d) Then enter your API key for MailChimp

Enter your API key for MailChimp

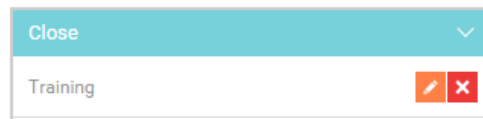e) Finally enter your List ID for MailChimp

Enter your List id for MailChimp

f) On the right of the screen is the Scope, depending on the level of the login will determine what scope is available. The scope will determine at what level the palette will be displayed for this connector.

- **Customer level** – This will display the customer, groups and all venues. With the ability to select each level.

- **Group level** – This will display the selected group and the venues within that group.

- **Venue level** – Just this specific venue.

g) Once the scope is selected and the other details have been added, the button will become available. If information is missing the save button will remain Grey and you will not be possible to save.

h) Once saved you will be taken back to the Connectors area and a 1 will appear in the top right of the MailChimp connector. This connector is now live.
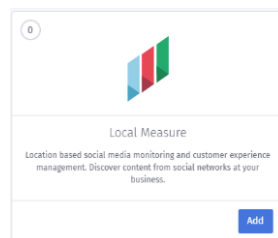
3. To edit an existing connector, click the button.

   a) Any connections created will be displayed, next to each name will be the available options to select.

   b) Clicking will delete the connector.

   c) Clicking will open the window allowing you to edit the details you added originally.
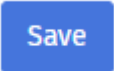
Local Measures

   a) The Local Measures connector can be set up at customer level or venue level and will push users' data into Local Measure once they have authenticated into your WiFi.

   b) You will need to give the Connector a name.

   c) Then enter the API details.

Connector Name

Enter your API key for local measure

d) On the right of the screen is the Scope, depending on the level of the login will determine what scope is available. The scope will determine at what level the palette will be displayed for this connector.

- **Customer level** – This will display the customer, groups and all venues. With the ability to select each level.

- **Group level** – This will display the selected group and the venues within that group.

- **Venue level** – Just this specific venue.

e) Once the scope is selected and the other details have been added, the **Save** button will become available. If information is missing the save button will remain Grey and you will not be possible to save.

Airship
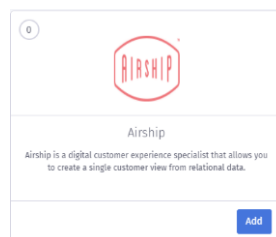
a) The Airship connector can be set up at customer level or venue level and will push users' data into Local Measure once they have authenticated into your WiFi.

b) Within the connector is a guide explaining in detail how to obtain the required information to complete the setup.

c) You will have five fields to complete, the first is the connector name.

d) The next two, **Login** and **Password** will need to be requested from **Airship** support on 08456580108 if not known.

e) The final two fields are to specify where you would like the data to be pushed to in **Airship**. By default, your main Contacts Folder and Group are labelled '**Default'** in Airship. To access your Contact Folders in Airship, scroll down to "**Contacts**" in the main menu and select "**Folders and Groups**"

f) The final two fields "**Name folder where to push users**" and "**Name group to push users**" are prefilled with "**Default**". You can of course update this to match any specific Folder or Group you like in Airship.

g) In terms of communication preferences, it will default to what the user has specified in the BT Wi-Fi Portal.

h) On the right of the screen is the Scope, depending on the level of the login will determine what scope is available. The scope will determine at what level the palette will be displayed for this connector.

- **Customer level** – This will display the customer, groups and all venues. With the ability to   select each level.

- **Group level** – This will display the selected group and the venues within that group.

- **Venue level** – Just this specific venue.
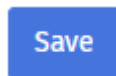
i) Once the scope is selected and the other details have been added, the [Save] button will become available. If information is missing the save button will remain Grey and you will not be possible to save.

Microsoft Dynamics
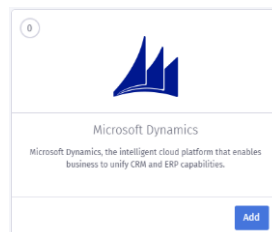
a) This connector can bet set up at Company or venue level and will push users' data into Microsoft Dynamics once they have authenticated onto your WiFi.

b) On the Microsoft Dynamics connector click on the green plus button

c) Now you will be presented with six fields:

- Connector name

- Username for Microsoft Dynamics

- Password for Microsoft Dynamics Resource

- URL for Microsoft Dynamics

- Client ID for Microsoft Dynamics

- Client secret for Microsoft Dynamics

d) You can label the Connector Name to be anything you like.

e) Next, enter your Microsoft Username and Password.

f) To find the Resource URL, you will need to go to Microsoft Dynamics and select Marketing. This will generate a new URL in your search bar. Copy this URL into the Resource URL field in the BT Wi-Fi Portal.
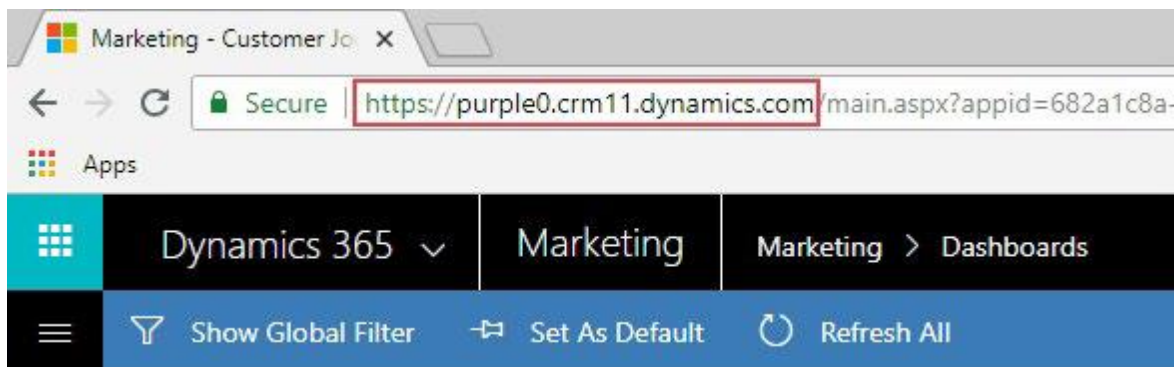
g) To enter the Client ID and Client secret, log into Microsoft Azure and click on Azure Active Directory from the left-hand menu.

h) From the Azure Active Directory menu, select App registrations and click + New application registration from the top of the page.

   1. To do this, give the app a name, select Web App/API for the application type and enter a Sign-on URL. This can be a domain of your choice, your business domain for example.

   2. Then create the application.
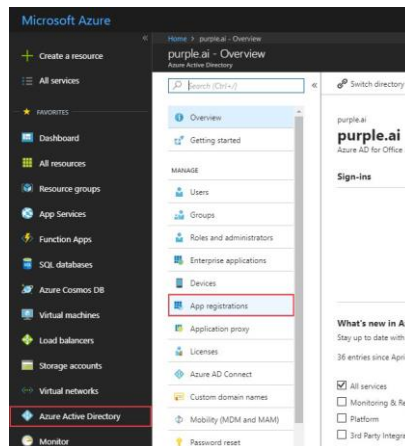
i) Once the application is registered, click on Settings.
j) Select Required Permissions and click Add.

k) Now click API.

l) Select Dynamics CRM Online, then select Permissions.

m) Ensure all checkboxes are ticked, then select Keys.

n) Add a Description and Duration, then click Save.
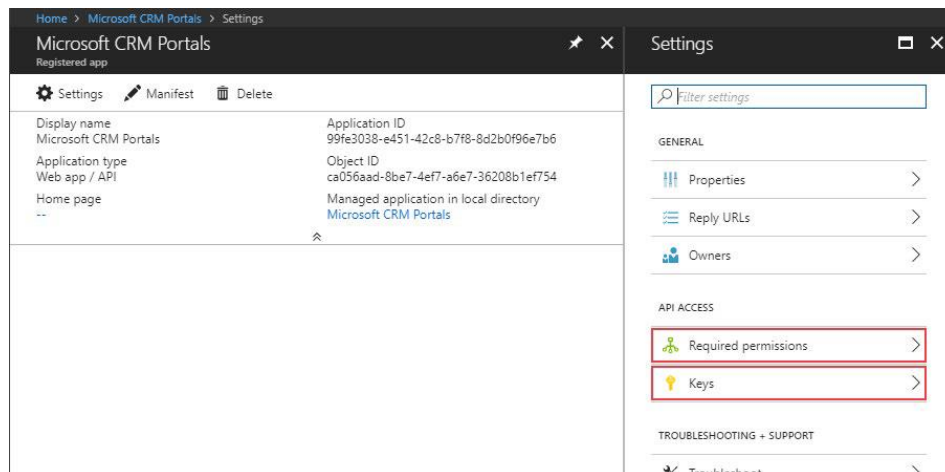
o) Be sure to copy the API Key and save it in a safe place before you exit as you will not be able to access it again once you leave the page.

p) Copy the API Key into the Client Secret field in the BT Wi-Fi Portal.

q) After the above steps have been completed you will need to validate the Microsoft Dynamics connector.

r) There will be a green notification if the verification is successful and you can then hit Save.

s) The Microsoft Dynamics connector will be active and authenticated users will be pushed to our Microsoft Dynamics.
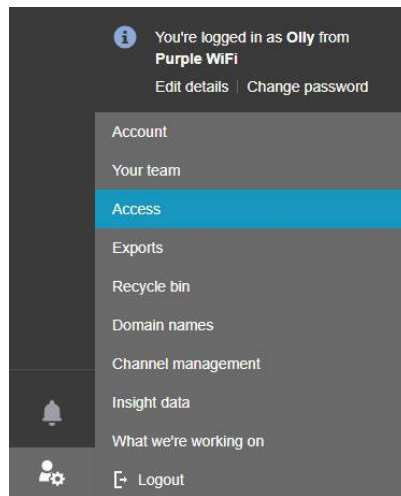
Dotmailer

a) This connector can bet set up at Company or venue level and will push users' data into Microsoft Dynamics once they have authenticated onto your WiFi.

b) Now you will be presented with four fields:

- Connector name

- dotmailer API email

- dotmailer API password

- dotmailer API endpoint

c) You can label **Connector Name** to be anything you like.

d) To enter the **dotmailer API email**, **dotmailer API password** and **dotmailer API domain**, you first need to create this in dotmailer.

e) To retrieve the correct information, log into dotmailer and click the Account Settings icon in the bottom left hand corner and select Access.

f) At the top of the Access page you will see **Your API endpoint is https://…**

g) Copy and paste this into the **dotmailer API endpoint** field.

h) For the **dotmailer API email** and **dotmailer API password** for dotmailer you need to create a new user.

i) Select New user. The email address should be pre-populated so you will just need to add a description and password then hit save.

j) Copy and paste the Email address and Password from dotmailer into the matching fields on the dotmailer Connector page.

k) After the above steps have been completed you will need to validate the dotmailer connector.

l) If the validation is successful, you will now be able to select an address book as a destination from the drop-down.

m) Once you have selected an Address Book and hit Save, the dotmailer Connector will be active and authenticated users will be pushed to your chosen Address Book in dotmailer.

Twilio
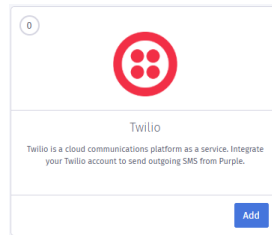
a) The Twilio connector is required in order to send SMS communications and is accessed at Customer level.

b) Within the connector is a guide explaining in detail how to obtain the required information to complete the setup.

c) You will require the following:

- Account SID
- Auth token
- SMS number

d) Enter the information and click button.