SFTP Vertify Setup Guide

This document outlines the required initial setup steps for the Vertify integration.

OVERVIEW

TECHNICAL NOTES

The SFTP Connector can connect over SFTP or FTPS protocols to a file server where it can read and write the following types of files representing relational data:

- CSV - comma-separated values
- TSV/TAB - tab separated values
- PSV - pipe-separated values

Vertify can host the SFTP if needed; please reach out to your Customer Success team directly to discuss options.

STEP 1: USER / FILE(S) CREATION

It is preferred that users are created with an Administrator role to ensure that no permissions errors are encountered during the implementation.

Action Item: Please create an Admin user for the integration and provide the following credentials to your Vertify Implementation Specialist.

1. Send over the Host URL (it should look something like services.[customername].com).
2. Create a new directory (folder) to use exclusively for the Vertify integration.
    - To keep things clean, we typically recommend creating two subfolders under that folder as well - ex: "Inbound” and "Outbound"
    - That way, you'll be able to keep the inbound files and the outbound files separate.
3. Create a new account to use for the Vertify integration, give it access to view only that folder, and retain the username and password for step 3 below (connecting to Vertify).
4. Upload sample file(s) from the CRM that include the fields you'd like to feed to the MAP as well as at least 1 row of sample data. These should be in a CSV format and will be used to generate a schema in Vertify for each file.
    - You can choose how you'd like to format the file(s), but we've found that it's typically easiest to drop in a separate file for each different object in the CRM.
    - For example, you may want to drop a file with Person data, a file with Company data, a file with Activity data, etc. If there are any other objects you'd like to feed to the MAP that are related to the Person record, those should most likely be dropped onto the SFTP server as separate files.
    - If you do upload multiple different files to the SFTP server, you'll want to do one of the following things to ensure Vertify knows which file to grab for each mapping to the MAP:
        - Standardize your file names so Vertify knows which file to pick up (for example, ensure your Person file is always called Person.csv, your Company file is always called Company.csv, etc.).
        - We can use wildcards in Vertify as well, so if there are timestamps on the end of your files that's okay too as long as the start of the file name will always be the same (i.e., Person1.18.2024.csv, Company1.18.2024.csv, etc.).

          OR

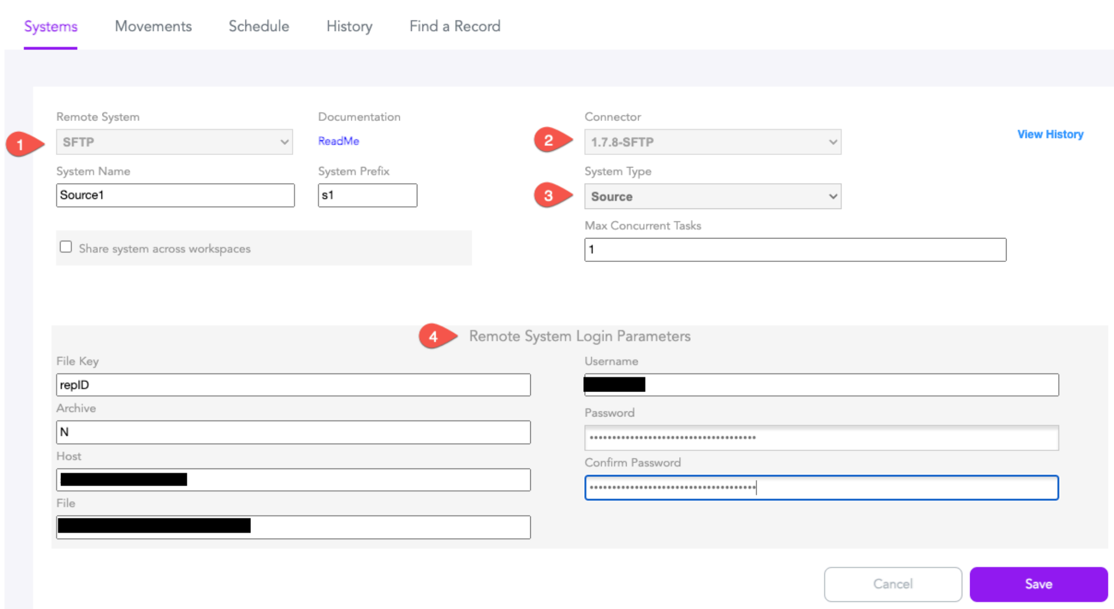
        - Create separate subfolders for each file you'll be uploading. If you go this route, the file names won't need to be standardized.

5. Finally, upload sample file(s) for any data that you'd like to pull from the MAP, drop onto the SFTP server, and ultimately upload back into the CRM.
    - These will also need to have the field name headers you'd like us to drop onto the SFTP server as well as 1 row of sample data.
    - These sample files will just be used to create the schema in Vertify so we can drop files from the MAP back onto the SFTP server with your desired format and field names.

STEP 2: LOG INTO VERTIFY

- Log into Vertify using the credentials below:
    - **Vertify URL**: Your Tenant URL provided by your Vertify One team
    - **Username**: Your email address
    - **Password**: Click the Forgot Password? link and choose a secure password for your account

STEP 3: CONNECT TO VERTIFY



1. Select the SFTP Remote System type from the dropdown
2. Then, select the most recent Connector version (highest number) and the correct type (if you want to include schema, etc.)
3. Next, select the System Type - Source will be the inbound files, Target are for outbound
4. Finally, enter all applicable information in the parameters below > press Save

    a. **File Key**: enter the primary key for the file (example: ID). This can be a compound key if needed to uniquely identify the records. The fields should be separated by a comma delimiter (ex: ID,Email)
    b. **Archive**: enter a value to determine if you'd like to archive the file once it's collected (example: Y for yes, N for no)
    c. **Host**: enter the URL for the host site (ex: services.nameofcompany.com)
    d. **File**: enter the path for Vertify to know where to pick up/drop off a file. A wildcard may be used for the file name (ex: /home/vertify/inbound/contacts/*.csv)
    e. **Username**: enter the Username for the SFTP
    f. **Password**: enter the Password for the SFTP
5. Once the login parameters are added to the system connect page, Scan the system again to display the objects + views on the Collect page. Please review and verify they show as expected.
6. Move on to Collect Schema for the Views and Tables and verify the fields that show. We recommend one record hold a value in all fields.

Please reach out to our support team for further assistance as needed, or your Vertify One Team.