



# empath-e

MAKING CRM MAKE SENSE

## Concep Send For Infor CRM™ - Implementation

**Date:** 26/09/2008 | 02/12/2008 | 01/06/2012 | 28/04/2015  
**Version:** 3.0.0 for codebase v3.0.0.0 [for CC2 & SalesLogix v7.5.x]  
**Author:** Mike Spragg  
**Contact:** 0845 1368444

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*empath-e is registered in England and Wales No: 04745733. Vat No. GB 901 2597 45*

*Registered Office: Unit 1, Freemantle Business Centre, Millbrook Road East, Southampton, SO15 1JR*

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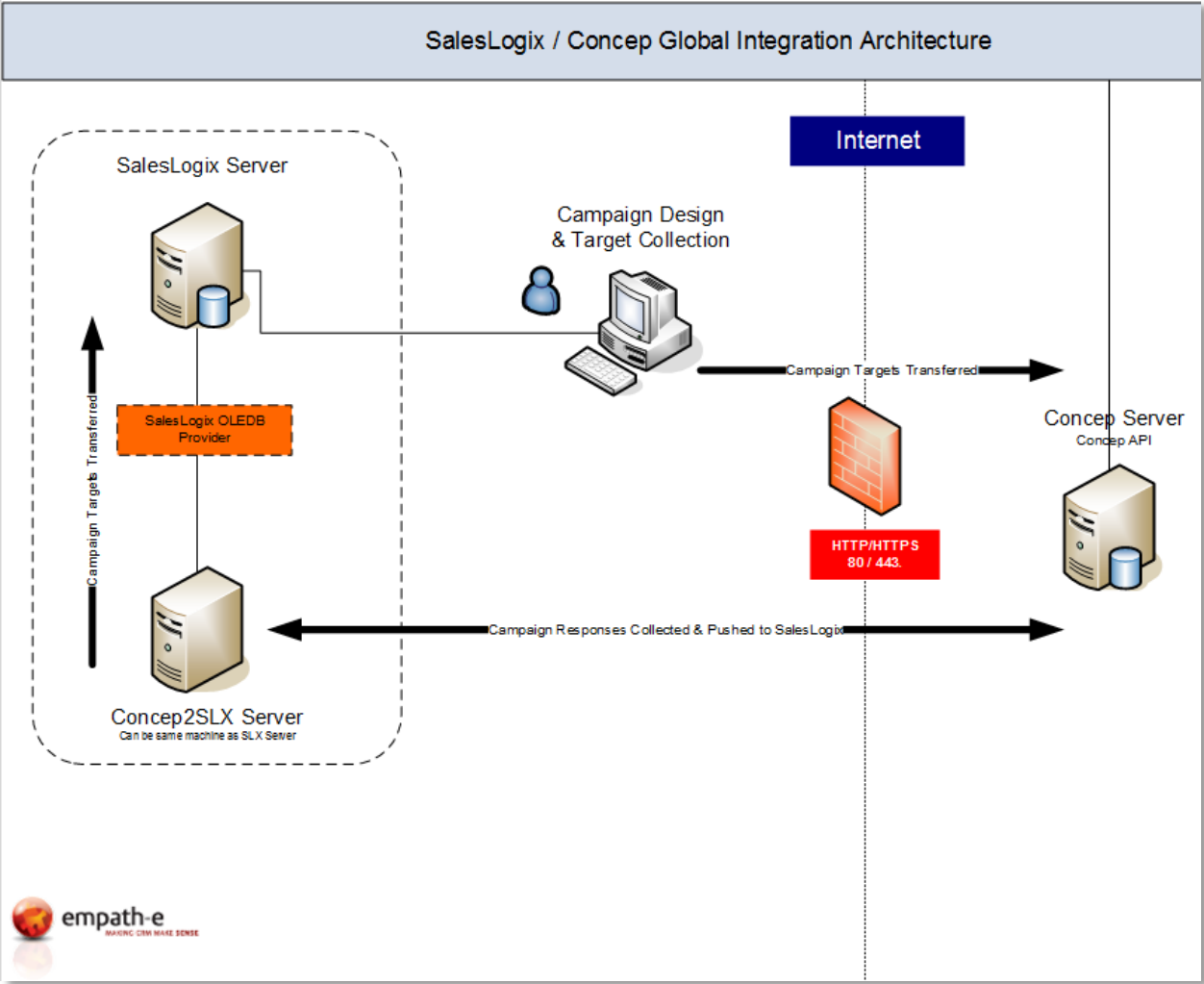


# 1.0 SYSTEM OVERVIEW

The Concep Send for Infor CRM application is designed to easily integrate within Infor CRM with minimal impact upon the existing system.

There are two parts – the Infor CRM client side, enabling you to upload campaign targets to Concep and the Concep Send For Infor CRM (known as Concep2SLX) Server component which is a windows service that polls the Concep server and downloads user interactions/activities (URL Clicks, File Downloads, Undeliverables etc) into Infor CRM.

The polling service (**Concep2SLX.exe**) can reside on any windows server – the database server or Infor CRM server for example.



## 2.0 PRE-REQUISITES

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### *Installation Requirements*

- Infor CRM v7.x or v8.x plus all normal pre-requisites for Infor CRM.
- **Important:** Backup the production system and ensure you have a working backup by restoring this to a development database.
- Ensure you have a valid Internet Connection available (especially if using VMWare in a test environment for example), as the application works via HTTP/HHTPS, and will need access to the Internet in order to communicate with the Concep service.



## ***Functional Changes***

The following views have changed, or been added, within Infor CRM:

<b>Plugin</b>	<b>Description</b>
Forms	System: Add Edit Marketing Services User <b><i>(Updated)</i></b>
Forms	System: Manage Marketing Services <b><i>(Updated)</i></b>
Forms	System: Marketing Services Launch Screen <b><i>(Updated)</i></b>
Forms	System: Add Edit Marketing Services User <b><i>(Updated)</i></b>
Forms	Campaign: Targets <b><i>(Updated)</i></b>
Forms	Campaign: Concep Send <b><i>(New)</i></b>
Forms	Contact: Concep Send <b><i>(New)</i></b>

## ***Table Changes***

The following table is added to Infor CRM and stores the responses being returned from Concep

<b>CONCEP_ACTIONS_1</b>		
CONCEP_ACTIONS_1ID	[char] (12)	Unique/Primary ID
CONTACTID	[char] (12)	The ContactID of responder
CREATEUSER	[char] (12)	
CREATEDATE	[datetime]	
MODIFYUSER	[char] (12)	
MODIFYDATE	[datetime]	
CAMPAIGNID	[char] (12)	The CampaignID for this response
RESPONSEDATE	[datetime]	Date of Response/Click
ACTIONTYPE	[varchar] (64)	ActionType from XML Response
ACTIONDETAIL	[varchar] (2000)	URL/Detail of ActionType
STATUS	[varchar] (8)	Set by Mappings tab in Configuration
MESSENGERACCOUNT	[varchar] (32)	<i>(Customer Specific)</i>
CONCEPID	[varchar] (16)	Unique MRID coming from Concep Send



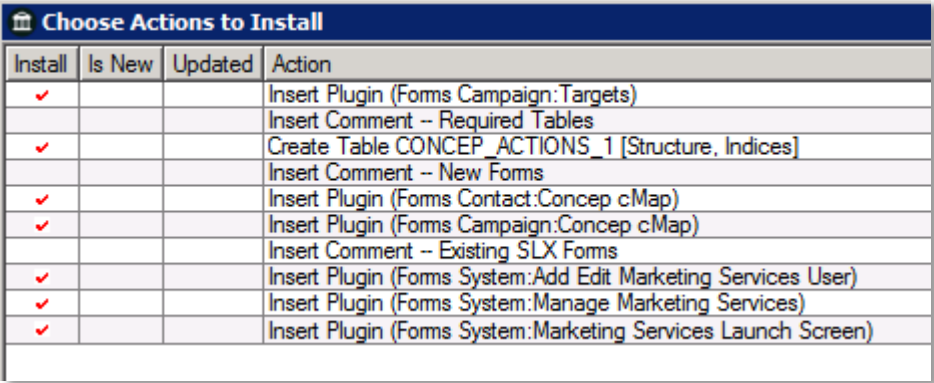
### 3.0 INSTALLATION

#### *Infor CRM*

Using the *Infor CRM Administrator*, apply the following bundle found in the **\Bundle\** folder from the provided deployment:

- **Concep Send Integration v7.5.4 R2.sxb** apply and overlay the new forms/scripts required for the Concep Integration

All plugins contained in the bundle will replace the existing plugins where necessary and the old plugins will be de-released and, therefore, available – should you need to revert to them at any time.



Install	Is New	Updated	Action
✓			Insert Plugin (Forms Campaign:Targets)
			Insert Comment -- Required Tables
✓			Create Table CONCEP_ACTIONS_1 [Structure, Indices]
			Insert Comment -- New Forms
✓			Insert Plugin (Forms Contact:Concep cMap)
✓			Insert Plugin (Forms Campaign:Concep cMap)
			Insert Comment -- Existing SLX Forms
✓			Insert Plugin (Forms System:Add Edit Marketing Services User)
✓			Insert Plugin (Forms System:Manage Marketing Services)
✓			Insert Plugin (Forms System:Marketing Services Launch Screen)











## Server Service

Copy all the files from the **\Deployment\** to a folder on the server (we suggest C:\CONCEP) you plan to use as the polling server service.

Next, simply run the **\_installservice.bat** file and this will install the server service. **Note:** You may need to modify this batch file to modify the path requirements if required.

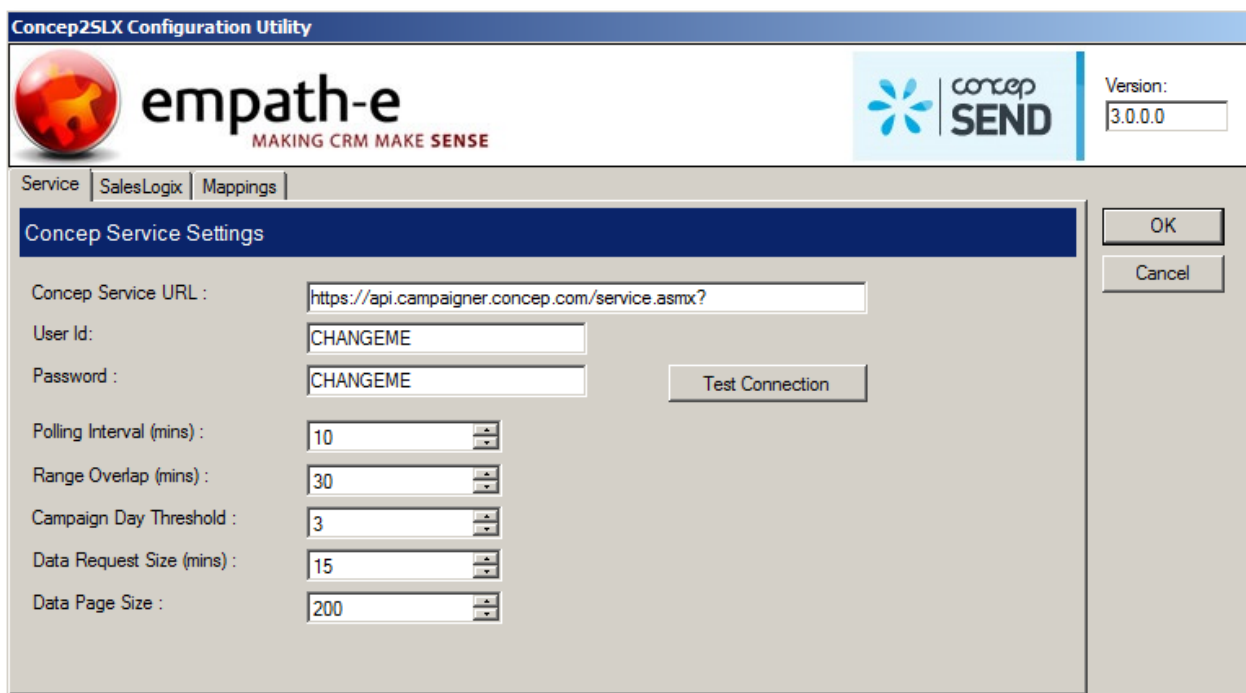
If you decide to uninstall the service – run the **\_uninstallservice.bat** to remove the service correctly.

 Distributed Link Tracking Client	Enables client programs t...	Started	Automatic	Local System
 Distributed Link Tracking Server	Enables the Distributed Li...		Disabled	Local System
 Distributed Transaction Coordi...	Coordinates transactions ...	Started	Automatic	Network S...
 DNS Client	Resolves and caches Dom...	Started	Automatic	Network S...
 empath-e : Concep2SLX	Polling service for Concep...		Automatic	Local System
 Error Reporting Service	Collects, stores, and repo...		Manual	Local System
 Event Log	Enables event log messag...	Started	Automatic	Local System
 File Replication	Allows files to be automat...		Manual	Local System

You are now ready to configure the system, which you should do **prior** to starting it.

## Server Service Configuration

All configurations are performed by running the application **Concep2SLXConfiguration.exe**




## Configuration Options

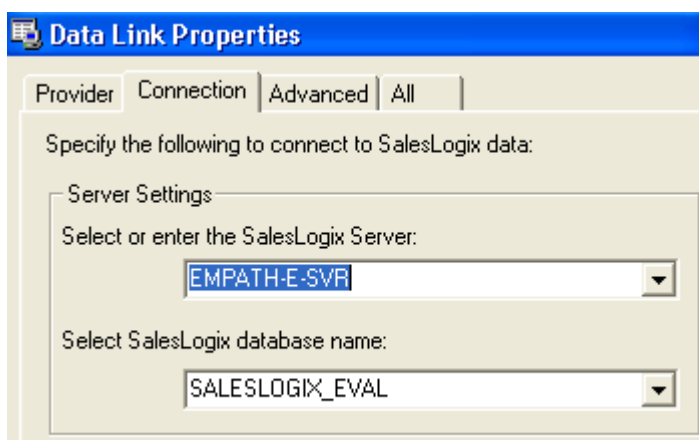
### Service

This tab contains the link information to Concep and parameters for service polling:

<b>Service URL</b>	The HTTP or HTTPS link to Concep Send Service – defaults to  <a href="https://api.campaigner.concep.com/service.asmx?">https://api.campaigner.concep.com/service.asmx?</a>  But can be changed should this change in the future by Concep.
<b>User ID</b>	The UserID (supplied by Concep) as the Admin account to login to Concep
<b>Password</b>	The password for above account
<b>Poll Interval</b>	Defines how often the service should contact the Concep server and establish if any data needs adding to Infor CRM – a default of 10 mins should be sufficient
<b>Range Overlap</b>	Defines the overlap period – we suggest 30 mins – and is used should the Concep service become unavailable. The service will poll for the end time as the current time – with a begin time minus this overlap period.
<b>Campaign Day</b>	Defines when to stop recording actions e.g. when set at 7 days (the default) any campaign results that exceed this period will not be recorded.
<b>Data Request Size</b>	Do not change
<b>Date Page Size</b>	Do not change

### SalesLogix (Infor CRM)

This tab contains the connection parameters for Infor CRM:



<b>Server Name</b>	From the Infor CRM Data Link, enter the Infor CRM Server Name ( <b>not</b> the physical server name)
<b>Database Name</b>	From the Infor CRM Data Link, enter the Infor CRM Database Name ( <b>not</b> the physical/logical database name)
<b>Port</b>	Enter the port number that Infor CRM Server listens on (default = 1706). A value of 0 assumes the default port (1706)
<b>User Name</b>	Enter the username (typically Admin)
<b>Password</b>	Enter the password for the above account





## Mappings

This section deals with the rules surrounding what actions to record, how many clicks to record and what status to set within the CONCEP\_ACTION\_1 table.

<b>Type ID</b>	Consult with Concep on this value.
<b>Log Status</b>	You can define whether this action type is recorded – or ignored.
<b>Status Text</b>	For each action type, and assuming the action is logged, this status is added and enabled you to onward process the table i.e. look for all Opt-Out actions and create a group within Infor CRM to process those.
<b>Type Text</b>	For this action type, this text is recorded into the table (as opposed to using a coded system)
<b>Max Records</b>	This defines how many times the system will record this action. For example, if a user opens an email and clicks a link 20 times – it will only be recorded 3 times (by default). You can increase or decrease this figure to suit your requirements.

Should the Concep system change in the future you can add/delete or amend the figures here, upon advice from Concep.

The screenshot shows the 'Concep2SLX Configuration Utility' window. It features the 'empath-e' logo with the tagline 'MAKING CRM MAKE SENSE' and the 'concep SEND' logo. The interface has tabs for 'Service', 'SalesLogix', and 'Mappings', with 'Mappings' selected. Below the tabs is a section titled 'Action Type Mappings' containing a table with the following data:

Type Id	Status Text	Type Text	Max Records
<input checked="" type="checkbox"/> EmailSent	Closed	Campaign Sent	3
<input checked="" type="checkbox"/> UniqueViewed	Closed	Campaign Viewed	3
<input type="checkbox"/> CompoundView	Open	Compound View	3
<input type="checkbox"/> PageViewInternal	Open	Inner Page View	3
<input type="checkbox"/> Forward	Open	Forward to a Friend	3
<input checked="" type="checkbox"/> UriClick	Open	URL Click or File Download	3
<input type="checkbox"/> Abuse	Open	Abuse	3
<input checked="" type="checkbox"/> Optout	Open	Opt Out	3
<input checked="" type="checkbox"/> UndeliverablePerm	Open	Undeliverable - Permanent	3
<input checked="" type="checkbox"/> UndeliverableTemp	Open	Undeliverable - Temporary	3
<input type="checkbox"/> Resent	Open	Campaign Resent	3
<input checked="" type="checkbox"/> ClientOptOut	Open	Client Global Opt Out	3

On the right side of the table, there are three buttons: 'Add', 'Edit', and 'Delete'.



## **Starting the Service**

Once you have configured the application, you are now ready to start the service. Go into Services and start the "**empath-e : Concep2SLX**" service. The service will start and, after the polling period, immediately connect with the Concep service and begin to bring data into Infor CRM (if applicable i.e. you have sent a campaign and are logging responses) – otherwise, it will simply poll until there is data to record.

This completes the server side installation and configuration.

You should consult the document "**ConcepSend-UserGuide.doc**" for further information on how to create campaigns, deliver them to Concep and analyse results being returned by Concep Send for Infor CRM.



## 4.0 DEFINE INFOR CRM/CONCEP USERS

In order to be able to submit campaign targets to Concep you, as the administrator, will need to define who can use the system.

This is managed via **Tools | Manage | Marketing Services** within Infor CRM. You should see the following: -

SalesLogix User	Partner Code	Username	Est. Usage	Primary	Enabled
Travers, Adam		adamt	0	No	Yes
Spragg, Mike		empathe	0	Yes	Yes

In here, add the users required. For the Username use the credentials provided by Concep – for one user - select the Primary option. You can assign other users to this login (Use Primary) and they will share this account - or you can create Secondary logins for those users who have their own logins to Concep.



## APPENDIX A – CONFIGURATION FILES

There are 2 files that are used to store configuration & logging data.

### concepConfiguration.xml

This stores the configuration settings from Concep2SLXConfiguration.exe. The only setting that should be modified manually is the **LastPollDateTime**. Should the system require “resetting” you can modify this date/time to a prior date/time and the service will then collect from that time onward. All other files should **not** be modified.

```
<?xml version="1.0" encoding="utf-8"?>
<!-- Messenger Settings -->
<PollingInterval>1</PollingInterval>
<LastPollDateTime>2008-09-24T20:12:06.262625+01:00</LastPollDateTime>
<OverLapInMinutes>20</OverLapInMinutes>
<CampaignThreshold>7</CampaignThreshold>
</ConcepConfiguration>
```

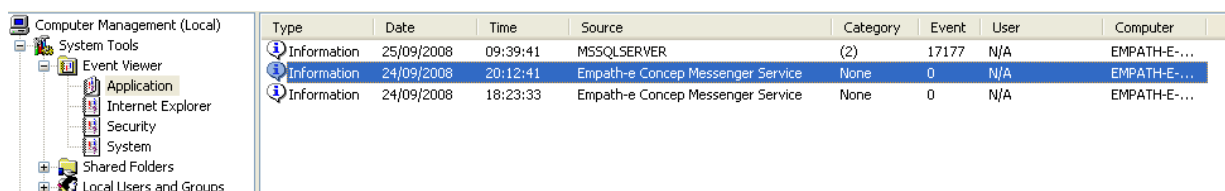
### log4net.config

As the service polls and performs its work – it can log details into the Windows Event Log. You can modify how much information is logged by modifying the parameter “Level Value” as indicated.

```
<log4net threshold="ALL">
  <appender name="EventLogAppender" type="log4net.Appender.EventLogAppender">
    <applicationName value="Empath-e.ConcepGlobal" />
    <layout type="log4net.Layout.PatternLayout">
      <conversionPattern value="%date [%thread] %-5level %logger [%property" />
    </layout>
  </appender>

  <root>
    <level value="ALL" />
    <appender-ref ref="EventLogAppender" />
  </root>

  <!-- ERROR, WARN, INFO, DEBUG, ALL, NONE -->
  <logger name="Empath-e.Concep">
    <level value="ERROR" />
  </logger>
</log4net>
```



Type	Date	Time	Source	Category	Event	User	Computer
Information	25/09/2008	09:39:41	MSSQLSERVER	(2)	17177	N/A	EMPATH-E...
Information	24/09/2008	20:12:41	Empath-e Concep Messenger Service	None	0	N/A	EMPATH-E...
Information	24/09/2008	18:23:33	Empath-e Concep Messenger Service	None	0	N/A	EMPATH-E...

