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MAKING CRM MAKE SENSE

Infor CRM Enhancements **Database Utility Tools**

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1.0 OVERVIEW

Provision

- Provide ability to update Infor CRM database with fixed data or data from a file based on specified columns
- Provide append, search & append and overwrite facilities

Bundle Contents

The following plugins are supplied or updated in this bundle.

Plugin Type	Item
Forms System:	EMAF_DBUpdate
Menus System:	EMMS_DBUtil

Updated:
(None)

Impact Analysis

None of the additions will alter the system in any way and can be easily removed without issue.

Installation

Simply install the bundle as normal – all plugins are unique and the bundle will update the scripts as necessary.

Post Bundle Install

Installing the bundle completes the installation.



2.0 DATABASE UPDATE UTILITY

Login to Infor CRM as Admin and go to Tools | Maintenance | DB Utility and the following is displayed:

empath-e Limited - DB Update Utility

Database Manipulation

Use this utility to append data to any database column. You may also search for existing data and only append if it does not exist already.

Using the File below option you can update data based upon a file list of database ID's, you can use File | Export for this purpose. For importing, this file MUST contain in column 1 a list of AccountID's or ContactID's. The column heading MUST be AccountID or ContactID.

Operation

Append Search and Append Overwrite

Input from

All Contact Group Account Group File

Append - Add to field ignoring existing.
Search and Append - check and append just once
Overwrite - ignore all and replace data

Import File:

SalesLogix Tables

Table:

Column:

Set to value:

Use file 2nd column instead of value above

The utility is multi-purpose, depending on the options you select – certain other options will highlight or gray out. Select the options most suitable for you based on the enclosed option notes.



3.0 OPTIONS AND RUNNING THE UTILITY

Operation

This determines what the utility should do with data that may already exist in the specified column:

Append	Will add the content to the existing column data
Search & Append	Will only add the content if the data does not already exist
Overwrite	Ignores existing content and overwrites entire content

Input From

This determines how much data will be affected@

-All-	All rows in the database are affected (be very sure of this option!)
Contact Group	Only the rows found in the specified contact group are affected
Account Group	Only the rows found in the specified account group are affected
File	You create an external file of ID's, the utility will use those and update rows found. You can optionally include a second column of content data – this is used instead of a fixed value.

Infor CRM Tables

TABLE	From the drop-down, select which table you wish to affect
COLUMN	The drop-down will show columns for the table selected above, choose the column you wish to update
Set to Value	You can specify a fixed/constant value here – all matching rows are updated with this content. Alternatively, you can choose to use a file and have the 2 nd column of the file be used to update the corresponding row.

Examples:

Updating All

The simplest example is to update all rows with a constant value

- Select the **CONTACT** table
- Select the **USERFIELD1** column
- Select Input From: **All**
- Enter "XYX" in the Set to Value

On pressing Update Database – the utility will update all USERFIELD1 columns with the data "XYX".



Updating by Group

- Select the **CONTACT** table
- Select the **USERFIELD1** column
- Select Input From: **Contact Group**
- Select the group: Latest Contacts
- Enter "XYX" in the Set to Value

On pressing Update Database – the utility will update all USERFIELD1 columns with the data "XYX" for all the records found in the contact group "Latest Contacts".

Updating by File

For this option – you will need a file of data that has been previously exported from Infor CRM – the following is an example:

```
File Edit Format View Help
"Accountid", "Userfield1"
"A6UJ9A000001", "My value 1"
"A6UJ9A000002", "My value 2"
"A6UJ9A000003", "My value 1"
"A6UJ9A000004", "My value 2"
"A6UJ9A000005", "My value 1"
"A6UJ9A000006", "My value 2"
"A6UJ9A000007", "My value 1"
"A6UJ9A000008", "My value 2"
"A6UJ9A000009", "My value 1"
"A6UJ9A00000A", "My value 2"
"A6UJ9A00000B", "My value 1"
"A6UJ9A00000C", "My value 2"
```

In this example, we have two columns – the Infor CRM **ACCOUNTID** and the column **"USERFIELD1"**.

Infor CRM will use the first column to identify what rows to update (note, you cannot mix account and contact IDs).

NB: *Despite the column name being in the file – you must still select this in the utility interface.*

Accountid	Userfield1
A6UJ9A000000	My Value 1
A6UJ9A000002	My Value 2

Database Manipulation

Use this utility to append data to any database column. You may also search for existing data and only append if it does not exist already.

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Using the File below option you can update data based upon a file list of database ID's, you can use File | Export for this purpose. For importing, this file MUST contain in column 1 a list of AccountID's or ContactID's. The column heading MUST be AccountID or ContactID.

Operation

Append
 Search and Append
 Overwrite

Input from

- All -
 Contact Group
 Account Group
 File

Group:

Import File:

SalesLogix Tables

Table:

Column:

Set to value:

Use file 2nd column instead of value above

Record: A6UJ9A000002 updated with 'My Value 2'

