



empath-e

MAKING CRM MAKE SENSE

Infor CRM Enhancements **Populate History**

Date: 24/06/08
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Author: Mike Spragg
Contact: 0845 1368444 / 07900 888715

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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 OVERVIEW

Provision

- Insert into Notes-History a pre-determined note/letter/email/fax for every contact found within the specified group.

Bundle Contents

The following plugins are supplied or updated in this bundle.

Plugin Type	Item
Forms System:	EMAF_Populate History
Menus System:	EMMS_PopulateHistory

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 RUNNING THE POPULATION

Login as Admin and go to Tools | Manage | Populate History and the following is displayed:

Populate History
Use this form to create and attach information to SalesLogix contacts.

Contact group to use: Duplicate Emails

History Type: 262148 Note

Regarding: Duplicates for Tidying

Category: Qualification

Notes: Julie, please work through this list and qualify for me - thanks !

Progress: Waiting to start

Start >

From the drop-down, select the group you wish to use. The History Type determines what type of history to create.

Enter a Regarding / Category and some notes to be added to the records. Press **Start** to begin the process.



3.0 EXAMINING THE RESULTS

Each contact, which was contained in the group, will now have the history record created as per the type specified.



The screenshot shows a software interface with a tabbed menu at the top including 'Notes/History', 'Activities', 'Attachments', 'Lead Sources', 'Opportunities', 'Associations', and 'Summary'. Below the tabs is a toolbar with 'Filter Options >>', 'Edit / View Notes', 'E-mail', 'Word', and 'Refresh'. A status bar indicates 'Records shown: 1'. The main area contains a table with the following data:

Type	Date/Time	Username	Contact Name	Result	Description	
Note	01/07/2008 18:5	Administrator	Spragg, Mike	Complete	Duplicates for Tidying	Julie, please work through this list and quality for me - thanks !

Two red arrows point to the 'Note' type in the first column and the description text in the last column.

This utility is very useful if you need to send a letter to many hundreds/thousands of contacts – and wish to use a mailing house for this process. You can then, using the same group you used to export the data, add a note/letter as if the mailing was performed direct from Infor CRM.

