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Infor CRM Enhancements Telephone Preference Services

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1.0 OVERVIEW

Provision

- Provide ability to scan a file produced by the Telephone Preference Service and update Infor CRM Contact & Account records as appropriate
- Enable optional scan of contact and/or account records for business/residential file
- Provide visual feedback on the main forms to indicate who is TPS barred or not
- In order to use this utility you must register with TPS and purchase the file directly from them. This information can be found at <http://www.tpsonline.org.uk/tps/>. You should purchase the full download, **without** spaces file.
- Ensure utility can scan & process millions of records now held by TPS in a timely fashion – at the time of writing this now exceeds 13 million telephone numbers.

Bundle Contents

The following plugins are supplied or updated in this bundle.

Plugin Type	Item
Forms System:	EMAF_TPS
Toolbars System:	EMTB_COMMS
Example forms:	Account Detail_example
	Contact Detail_example
Create Field	CONTACT:COMMS_TPS_STATUS VARCHAR(64) NULL
	ACCOUNT:COMMS_TPS_STATUS VARCHAR(64) NULL
Create Indexes	ACCOUNT_COMMS_TPS_STATUS on ACCOUNT (COMMS_TPS_STATUS)
	CONTACT_COMMS_TPS_STATUS on CONTACT (COMMS_TPS_STATUS)

Updated:
 (None)

Impact Analysis

The bundle will install 2 columns and 2 indexes but these can be easily removed without issue. The other plugins are unique and can be removed without further issue.

Installation

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

Post Bundle Install

Create a folder to store the TPS file purchased earlier and the utility will also write to this folder for logging purposes.



2.0 THE TPS UTILITY

Login to Infor CRM as **Admin** and from the toolbar select the TPS Icon and the following is displayed:

Empath-e TPS Check

Telephone Preference Service

Use this form to update contacts in the database with the details held by the Telephone Preference Service.

Select the file and press 'Start' to process.

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TPS File: c:\tmp\tps.txt

Audit File: c:\tmp\audit.txt

Change Status ?

Scan Contacts ? Update Do Not Phone ?

Scan Accounts ?

Start >>

(It is important you login as Admin, as this bypasses the security layer and ensures all records are scanned and processed).

Simply point the utility at the TPS file and select the options as required.



3.0 OPTIONS AND RUNNING THE UTILITY

TPS File	Point this to the file purchased from the TPS Service
Audit File	Ensure this folder exists, logging information is written to this file

Options

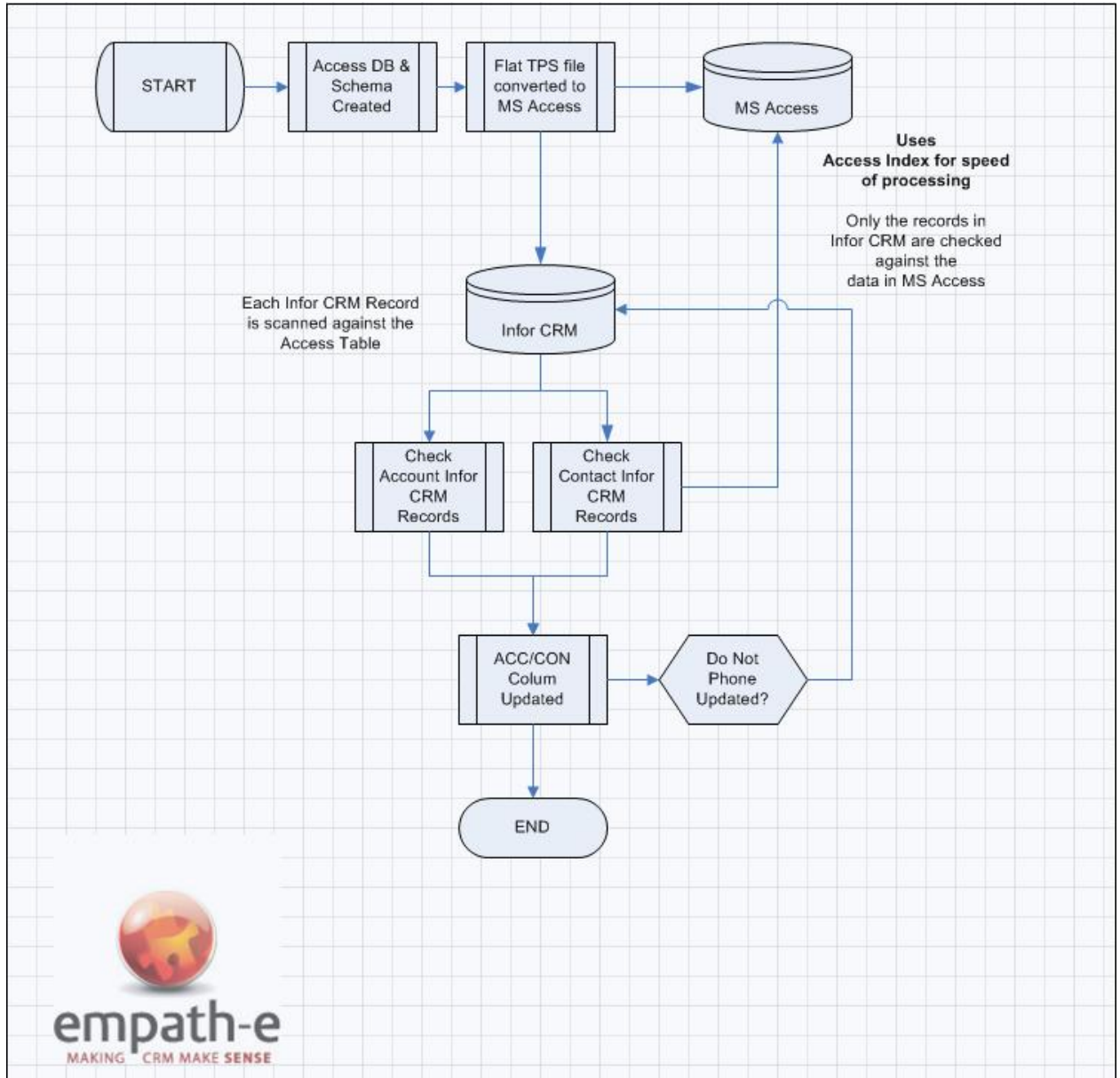
This determines how much data will be affected:

Change Status	When selected – all Infor CRM rows are nulled out for the column COMMS_TPS_STATUS – this ensures a “clean” run. However, if you are processing multiple files then this should be switched Off to avoid negative updates on subsequent files. This is on by default.
Scan Contacts	When selected, the Infor CRM Contact WORKPHONE is compared to the TPS file. This is on by default.
Scan Accounts	When selected, the Infor CRM Account MAINPHONE is compared to the TPS file. This is on by default.
Update 'Do not Phone'	If this is selected, and the Scan Contacts option is selected, when a match is found then the Infor CRM Contact DONOTPHONE column is set to “T”.



Process Flow

The following diagram summarises what happens during the processing of a TPS file.



By converting the TPS Text file to an Access Database the utility can utilise the indexes held on both systems, rather than a table scan of multiple thousands of rows against millions of text lines. It also avoids the need to pre-import the data into Infor CRM.



Viewing the Output

Once the utility has finished – an audit file is generated to display the results. You should examine this for errors and statistics.

```
File Edit Format View Help
04/07/2008 19:23:02 --- Opening Audit file
04/07/2008 19:23:02 --- Opening TPS file
04/07/2008 19:23:02 --- Creating schema File
04/07/2008 19:23:02 --- Checking for Access Database
04/07/2008 19:23:02 --- Access Database existed, deleted
04/07/2008 19:23:02 --- Creating Access Database
04/07/2008 19:23:02 --- Creating Access Table
04/07/2008 19:23:02 --- Creating Access Table Index
04/07/2008 19:23:02 --- Converting TPS file to Access, this will take a few minutes
04/07/2008 19:23:02 --- Access Import Complete
04/07/2008 19:23:02 --- Clearing Contact TPS Status flags
04/07/2008 19:23:02 --- Clearing Account TPS Status flags
04/07/2008 19:23:02 --- Starting Account Check
04/07/2008 19:23:02 --- Account: 1
04/07/2008 19:23:02 --- Found: A6UJ9A000000 08451368444
04/07/2008 19:23:02 --- Finished Account Check
04/07/2008 19:23:02 --- Starting Contact Check
04/07/2008 19:23:02 --- Contact: 1
04/07/2008 19:23:02 --- Found: C6UJ9A000000 08451368444
04/07/2008 19:23:02 --- Finished Contact Check
04/07/2008 19:23:02 ---
04/07/2008 19:23:02 --- -----
04/07/2008 19:23:02 ---           Contacts : 1
04/07/2008 19:23:02 ---           Accounts : 1
04/07/2008 19:23:02 --- Total Matches : 2
04/07/2008 19:23:02 ---
04/07/2008 19:23:02 --- ** Completed **
```



4.0 [OPTIONAL] CHANGES TO ACTIVE FORMS/SCRIPTS

We have provided two sample forms (Account Detail_example and Contact Detail_example) which you can open and cut/paste the changes needed for visual display of the current TPS Status for each record. This step is optional but does provide visual feedback when viewing any contact/account record in Infor CRM.

Changes Needed

Each AXFormChange needs to be modified to call the SetColourForTPSStatus subroutine as indicated below:

```
Sub AXFormChange(Sender)
    Dim strAddress, strAddressDesc

    gStrCrntAddressID = txtAddressID.Text
    mnuAddress.Items.Clear

    'Display the Primary address
    If txtAccountID.Text = Sender.CurrentID Then
        GetDisplayAddress False, "ACCOUNT", "ACCOUNTID", txtAddressID
        mmoAddress.Text = "" & strAddress
        lblCurrentAddress.Caption = "" & strAddressDesc
    Else
        mmoAddress.Clear
        MsgBox Application.Translator.Localize("You do not have access to this account")
    End If
    Exit Sub
End If

lueParent.LookupRestrictValue = txtAccountID.Text 'Don't allow
lueParent.Text = GetField("ACCOUNT", "ACCOUNT", "ACCOUNTID = " & txtAccountID & " ")
cmdHierarchy.Enabled = ((lueParent.LookupID <> "") Or (GetField("ACCOUNT", "ACCOUNT", "ACCOUNTID = " & txtAccountID & " ") = ""))
gStrAccount = txtAccountID.Text
gStrParentAccountID = lueParent.LookupID

'TPS Changes
SetColorForTPSStatus
End Sub
```

You should then paste the following code to the **end** of the script:

```
Sub SetColorForTPSStatus

    Dim TPS_Status
    TPS_Status = GetField("COMMS_TPS_STATUS", "ACCOUNT", "ACCOUNTID = " & frmContactDetail.CurrentID & " ")

    Select Case Left(TPS_Status, 12)
        Case "No TPS Match"
            ppeMainPhone.Color = vbGreen
            ppeMainPhone.Hint = "Telephone Preference: " & TPS_Status
        Case "TPS Matched"
            ppeMainPhone.Color = vbRed
            ppeMainPhone.Hint = "Telephone Preference: " & TPS_Status
        Case Else
            ppeMainPhone.Color = vbWhite
            ppeMainPhone.Hint = "Telephone Preference: (None Recorded)"
    End Select
End Sub
```

You should also click the ShowHint property for the telephone objects on the form.

NB: The Contact & Account Detail forms are different, ensure you copy the correct code block.



Viewing the Display

As you change records within Infor CRM the display will change to indicate the current TPS status.

Work:	<input type="text" value="0845 1368444"/>	<input checked="" type="checkbox"/> Primary Contact for Acct.
Mobile:	<input type="text" value="07958 358299"/>	Telephone Preference: TPS Matched on : 04/07/2008 19:23:02
Fax:	<input type="text"/>	Preferred Contact: <input type="text"/>
Home:	<input type="text" value="01489 783330"/>	<input type="checkbox"/> Do Not Solicit <input type="checkbox"/> Do Not Mail
Other:	<input type="text"/>	<input type="checkbox"/> Do Not Email <input type="checkbox"/> Do Not Fax
		<input checked="" type="checkbox"/> Do Not Call

Work:	<input type="text" value="0870 0466622 398: 7"/>	<input checked="" type="checkbox"/> Primary Contact for Acct.
Mobile:	<input type="text" value="07958 358299"/>	Telephone Preference: No TPS Match on : 04/07/2008 19:23:02
Fax:	<input type="text"/>	Preferred Contact: <input type="text"/>
Home:	<input type="text" value="0208 1234"/>	<input type="checkbox"/> Do Not Solicit <input type="checkbox"/> Do Not Mail
Other:	<input type="text"/>	<input type="checkbox"/> Do Not Email <input type="checkbox"/> Do Not Fax
		<input type="checkbox"/> Do Not Call

This provides a very clear and unambiguous display to the user to ensure that they do not call for telemarketing purposes.

