Customer Relationship Management

LSI/CG Business Solution Template Guide

Version 14.1

Aurea

Unlimited Possibility

Notices

Table of Contents

Preface

For details, see the following topics:

About this documentation

This guide is part of the documentation set for Aurea CRM.

Notation conventions

This document uses the following notation conventions:

Convention	Meaning
`Fixed-width`	`Fixed-width` font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
`Bold Fixed-width`	**`Bold Fixed-width`** font is used to indicate user input or to emphasize certain lines of code.
Italic Fixed-width	*Italic Fixed-width* font indicates a placeholder for which you must supply a value.
Bold Sans serif	**Bold sans serif** typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
Italic serif	In text, *italic serif* typeface indicates the first use of an important term. The term is defined in the glossary.
Underlined	Underlined text in command lines and parameter descriptions indicate that you only have to enter the underlined part of the command or parameter name. For example, if you use the`-LOGFILE` parameter in a command, you only need to enter `-LOGF`.
[ ]	Brackets enclose optional arguments.
{ *a* | *b* | *c* }	Braces enclose two or more items. You can specify only one of the enclosed items. Vertical bars represent OR separators. For example, you can specify a or b or c.

Convention	Meaning
...	Three consecutive periods indicate that you can repeat the immediately previous item. In code examples, they can be horizontal or vertical to indicate omissions.
Menu > Choice	An angle bracket between two menu items indicates that you should choose an item from a menu. For example, the notation **File** > > **Exit** means: "Open the **File** menu and choose **Exit**."
>>	Links to related information in other chapters or documents are indicated using the **>>** symbol.

Aurea global support

If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please open a ticket on Aurea Support Central. Preferably, search the articles on the Aurea Knowledge Base for solutions to your issues before opening a ticket.

Information about the support organization is available on Support Central. The product documentation is available athttps://help.aurea.com/crm/#.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, contact us through our website.

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CRM base

Here you can know the basic settings required for Business solution template.

Below are the topics that guides you through the basic configurations and settings for business solution template:

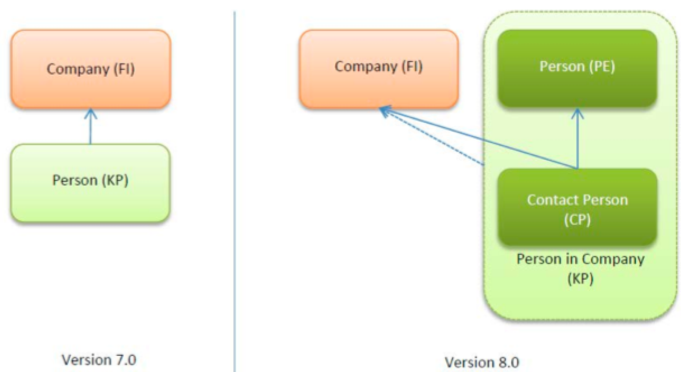
Customer Base (CRM #70000010)

Learn to set up basic customer configuration.

Trinity

Overview

The KP info area is now split into 2 new info areas: PE and CP.



Person (PE) represents the physical person and therefore contains all data which is independent of a company.

Role (CP) represents the person related to a company.

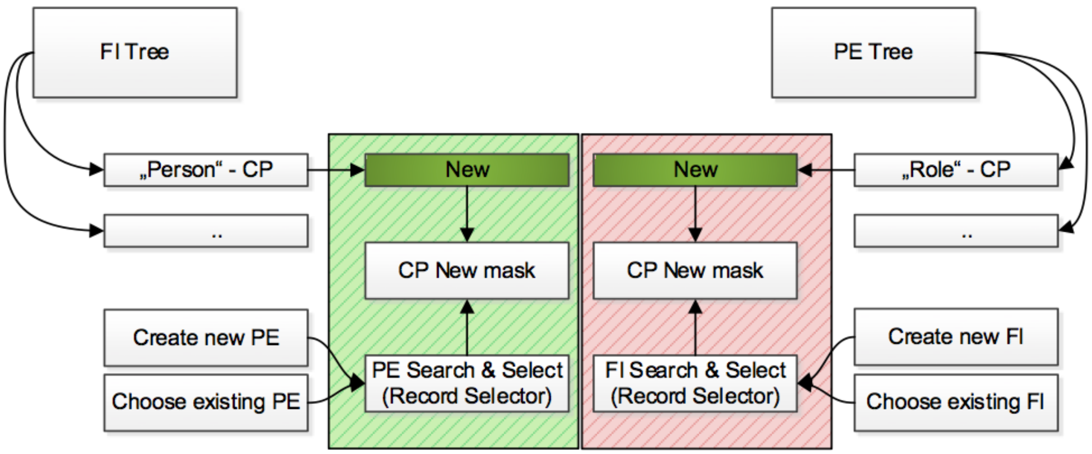
Contact Person (KP) is a join of the data in PE and CP for one company.

Tip: It is possible to work with the KP info area like in Aurea CRM. However, we are not using the KP info area in masks or right settings. Otherwise you can get confused by 3 different info areas for persons.

The mapping for KP to PE/CP is defined in the data model. The KP info area uses text references only to the CP and PE info areas. So you always have to change texts in either CP or PE, never in the KP info area.

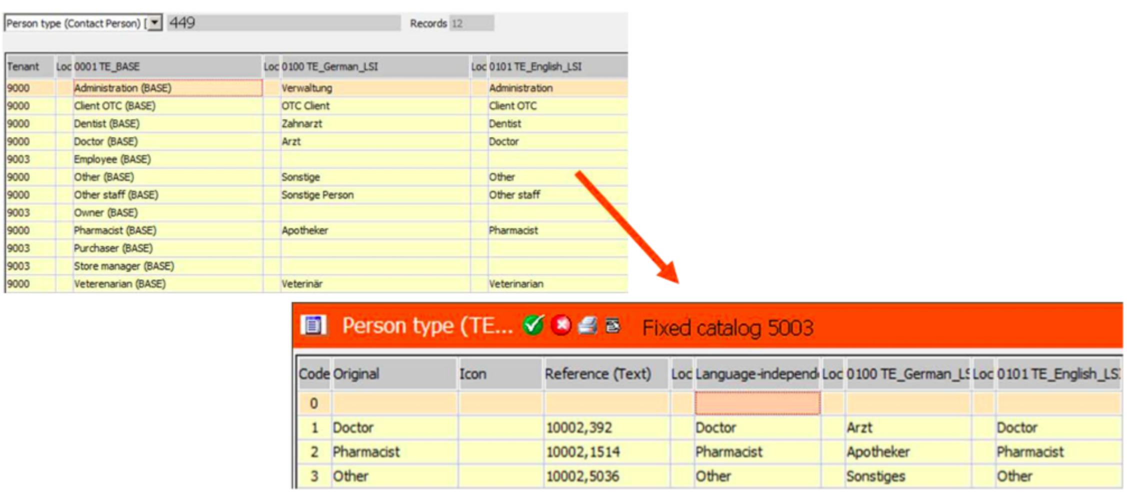
The only CP info area is used in FI or PE tree view to describe the related area of a person.

The CP info area within FI is used for the “Person” node (with “Person” label) and in PE the CP info area is used as “Role” node (with “Role” label). On “New” there is basically the same CP mask excluding a different record selector for the linked info area. If a user clicks on “New” from the “Person” node in FI tree, then the CP new mask has a record selector for selecting a PE record. On the other side, if a user clicks on “New” from the “Role” node in PE tree, then the CP new mask has a record selector for selecting a FI record. In both cases the user is able to add a new record, or selecting an existing one from the list.



Person (PE)

"TE_PE_UPD_Map Person Type" trigger --> PE.5051 "Person Type (TE)" The mapping of values from var cat. to fixed cat. is handled by variables.



Person type (Contact Person) 449 Records 12

Tenant	Loc	0001 TE_BASE	Loc	0100 TE_German_LSI	Loc	0101 TE_English_LSI
9000		Administration (BASE)		Verwaltung		Administration
9000		Client OTC (BASE)		OTC Client		Client OTC
9000		Dentist (BASE)		Zahnarzt		Dentist
9000		Doctor (BASE)		Arzt		Doctor
9003		Employee (BASE)				
9000		Other (BASE)		Sonstige		Other
9000		Other staff (BASE)		Sonstige Person		Other staff
9003		Owner (BASE)				
9000		Pharmacist (BASE)		Apotheker		Pharmacist
9003		Purchaser (BASE)				
9003		Store manager (BASE)				
9000		Veterenarian (BASE)		Veterinär		Veterinarian

Person type (TE... Fixed catalog 5003

Code	Original	Icon	Reference (Text)	Loc	Language-independ	Loc	0100 TE_German_LS	Loc	0101 TE_English_LS
0									
1	Doctor		10002,392		Doctor		Arzt		Doctor
2	Pharmacist		10002,1514		Pharmacist		Apotheker		Pharmacist
3	Other		10002,5036		Other		Sonstiges		Other

Usage in TreeViews

Coming from the FI tree you can see the CP node called “Persons”. Coming from the PE tree you can see the CP node called “Roles”.

Account Manager (SB)

Regarding territory management we are using the default Account Manager info area within the Aurea CRM default functionality. We are NOT using the Route User, which is part of the index, in order to be sure that no account manager record is deleted due to territory reorganisation. Therefore we offer the possibility to allocate using account managers 1-8 as well as Region Manager and Sales Manager (fields 5- 14).

Account manager records can be created manually or using the territory management.

A sales user is interested in his FI records. Sales Users can only see FI records with the following conditions:

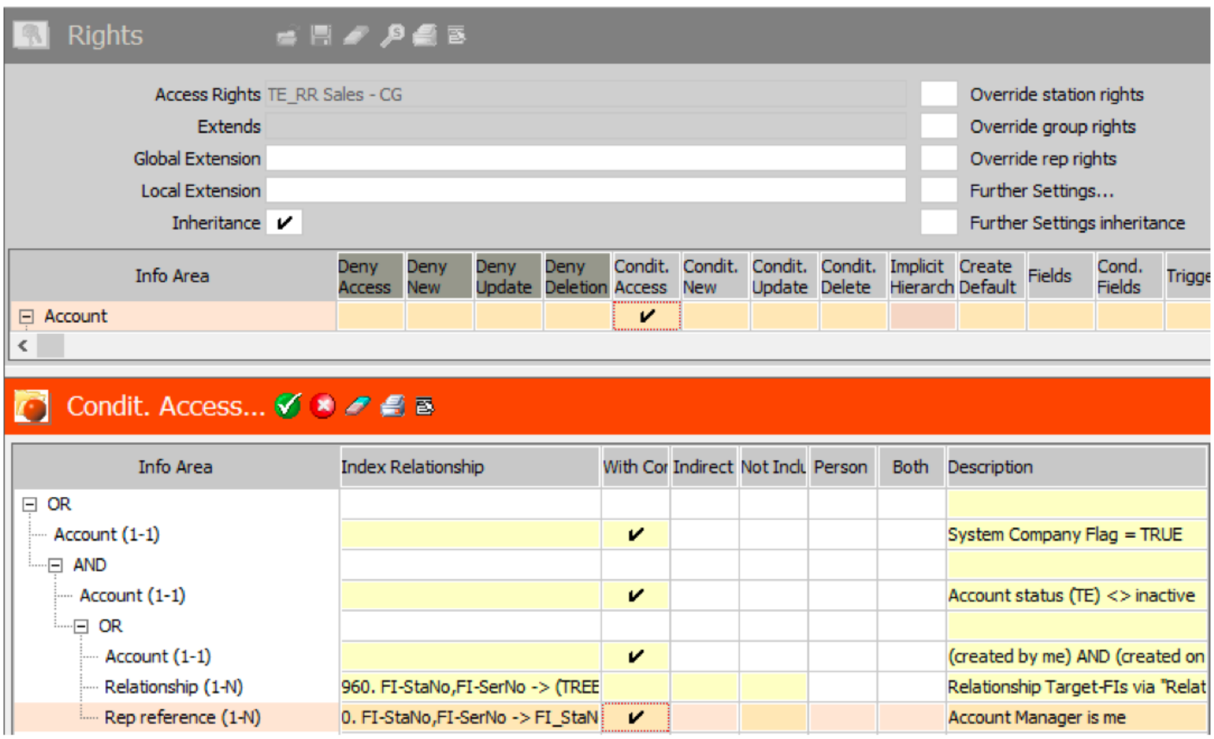
(Conditional access to FI where System Company Flag == true) OR

[Account Status (TE) <> inactive AND

(created by me and this week OR

Account Manger == me OR

FI via Relationships)]

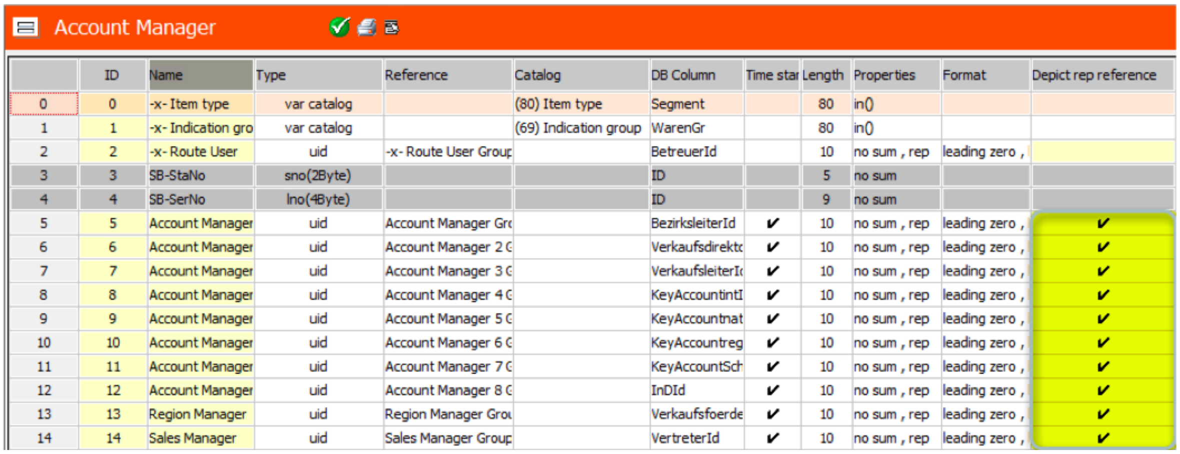


Due to performance issues we are using the “Rep reference” feature. Due to this structure change, we can simplify the rights settings for the sales rep. We are able to set conditions only on FI, PB and 10.

Data Model >> Info Area “Account Manager” (SB) >> Fields

Attention: We have renamed the fields “Functional Role” (SB.5008) and “TE: Splitted SB-record?” (SB.5009) with the “-x-“ prefix.

We have checked “Depict rep reference” for most of the uid fields. For more information please refer to the CRM.core – Administrator Guide Chapter “Depict Rep Reference”.



Account Manager

	ID	Name	Type	Reference	Catalog	DB Column	Time star	Length	Properties	Format	Depict rep reference
0	0	-x- Item type	var catalog		(80) Item type	Segment		80	in()		
1	1	-x- Indication gro	var catalog		(69) Indication group	WarenGr		80	in()		
2	2	-x- Route User	uid	-x- Route User Group		BetreuerId		10	no sum , rep	leading zero ,	
3	3	SB-StaNo	sno(2Byte)			ID		5	no sum		
4	4	SB-SerNo	lno(4Byte)			ID		9	no sum		
5	5	Account Manager	uid	Account Manager Gr		BezirksleiterId	✔	10	no sum , rep	leading zero ,	✔
6	6	Account Manager	uid	Account Manager 2 G		Verkaufsdirekt	✔	10	no sum , rep	leading zero ,	✔
7	7	Account Manager	uid	Account Manager 3 G		VerkaufsleiterI	✔	10	no sum , rep	leading zero ,	✔
8	8	Account Manager	uid	Account Manager 4 G		KeyAccountintI	✔	10	no sum , rep	leading zero ,	✔
9	9	Account Manager	uid	Account Manager 5 G		KeyAccountnat	✔	10	no sum , rep	leading zero ,	✔
10	10	Account Manager	uid	Account Manager 6 G		KeyAccountreg	✔	10	no sum , rep	leading zero ,	✔
11	11	Account Manager	uid	Account Manager 7 G		KeyAccountSch	✔	10	no sum , rep	leading zero ,	✔
12	12	Account Manager	uid	Account Manager 8 G		InDId	✔	10	no sum , rep	leading zero ,	✔
13	13	Region Manager	uid	Region Manager Grou		Verkaufsfoerde	✔	10	no sum , rep	leading zero ,	✔
14	14	Sales Manager	uid	Sales Manager Group		VertreterId	✔	10	no sum , rep	leading zero ,	✔

SQL Tool >> Calculate Rep Reference

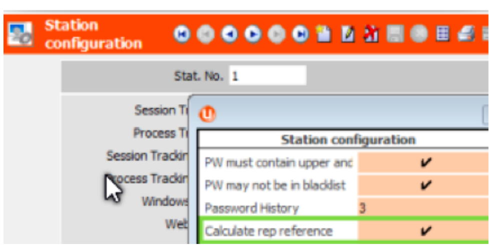
This setting enables the table “Rep reference” (10). As this table has to be filled you need to carry out the creation of records by starting the **SQL tool** (mmba.exe -q):

1. Select an info area for which rep references are configured.
2. Click on Calculate rep reference.

Use the ReCreate Procedure and ReCreate All Procedures buttons to re-create the database triggers.

Rights >> Station configuration for station 10002

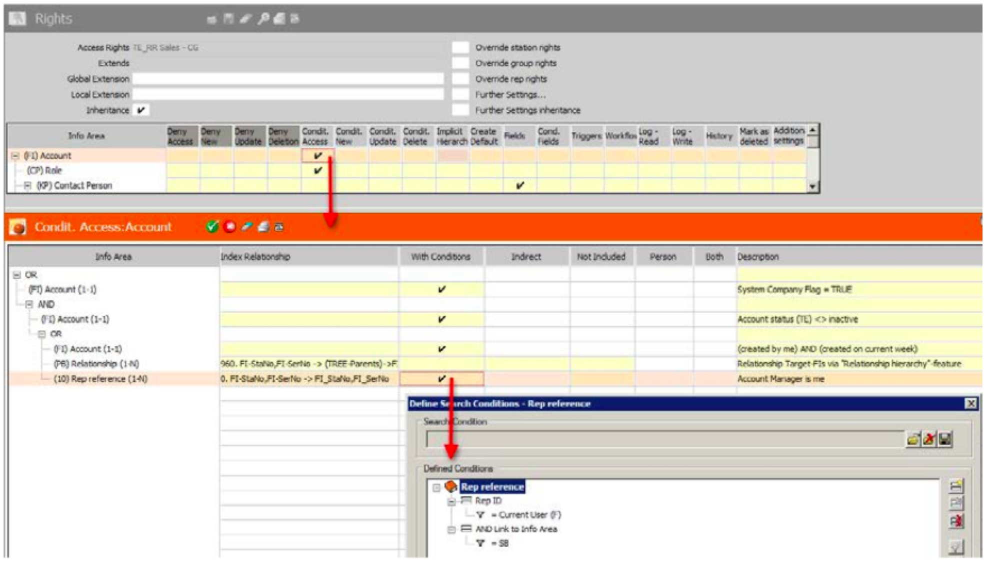
Check the field “**Calculate rep reference**” for your customer’s station in the rights module >> station configuration. The field “Calculate rep reference” must be set to true. Due to performance it is not recommended to activate this feature on offline stations.



Rights >> Template Sales Right Changes

The following changes were made to the sales rights (“TE_RR Sales - CG”, “TE_RR Sales OTC - LSI”, “TE_RR Sales Rx - LSI”).

Before (up to version 4): The conditional access for info area SB was controlled via SB directly. Since version 5 the conditional access to info area FI is controlled via SB and the Rep Reference (10).



Additional Address (ZA)

Additional Address is callable from the “FI-TreeView.

Triggers

• TE_ZA_UPD_Street

Set the “Street (Search)” field with the content of the field „Street“ Will be called at: Update, New, Update Fields ("Street”).

Calendar

The calendar is callable from the Application Menu -> Daily Business.

Buttons

TE_Cal_ActivityPlanning

o Calls the “TE_LSI_CallPlanning” form

o Configured in special headers: “CalendarHeader” and “DayWeekPlanningCalendar”

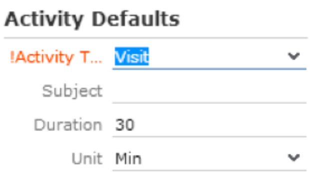
Filters

• MA.Sidebar

• A3.Sidebar

• A1.SidebarActivity Defaults

“MADayWeekPlanningDefaults” details field group of the MA info area

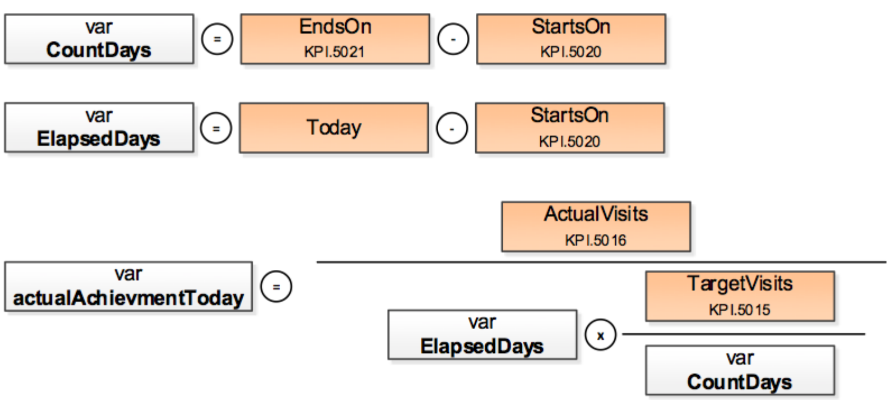


Sidebar

Configuration of the “CalendarSidebar” special header.

Day and Week Planning

The Day and Week Planning is callable from: Application Menu -> Daily Business > Daily & Weekly Planning.



Customer Profile (CRM #70000070)

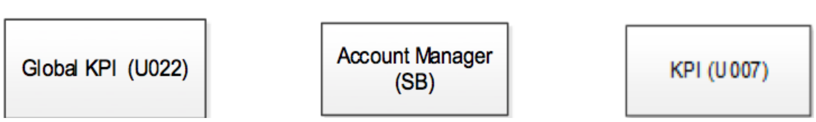
Learn to set up customer profile.

Global KPI (U022)

Overview

Basically, the Global KPI area is used to create new KPI records for an FI or KP record. A workflow is used in the search of Global KPI which first checks existing SB records and subsequently creates new KPI records.

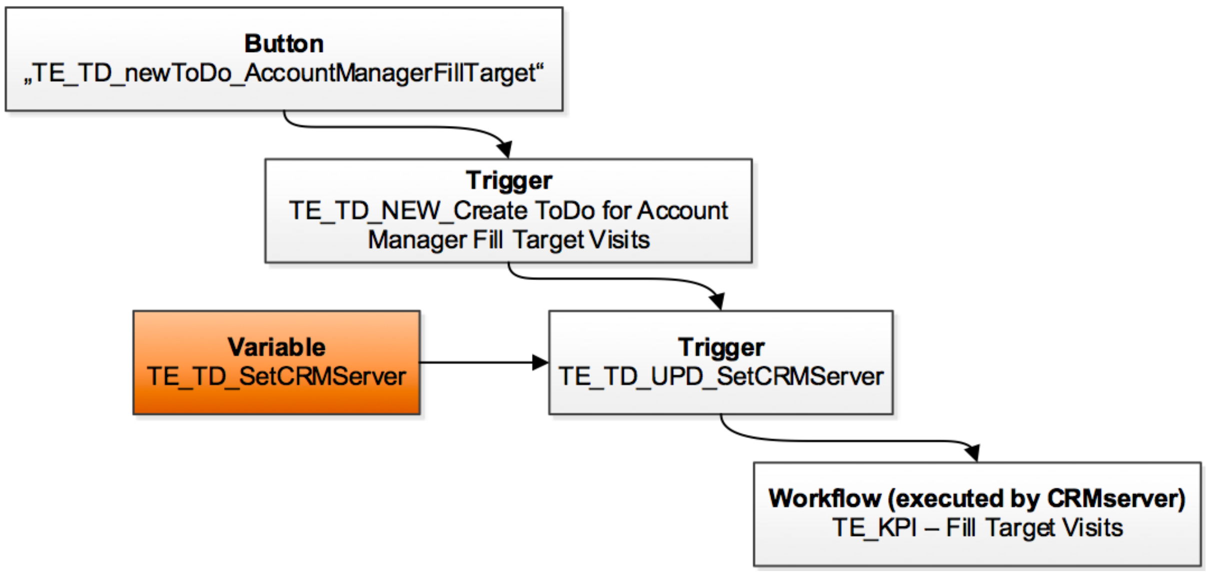
Data model



Note: Global KPI is only visible for users with admin roles

Buttons

• TE_TD_newToDo_AccountManagerFillTarget



Menu actions

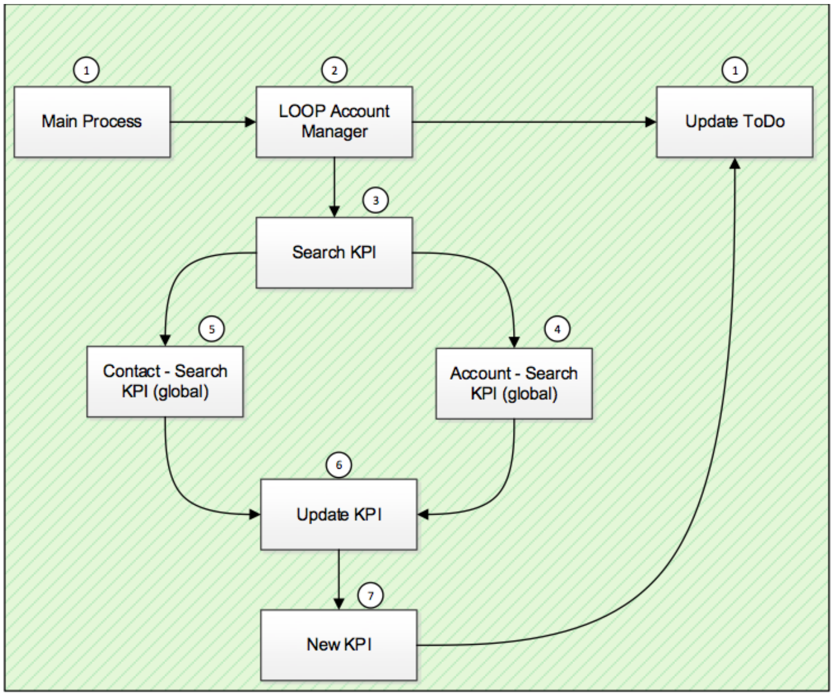
• ID_NET_GLOBAL_KPI_SETTINGS calls the search mask of U002.

Workflow

• TE_KPI - Fill Target Visits

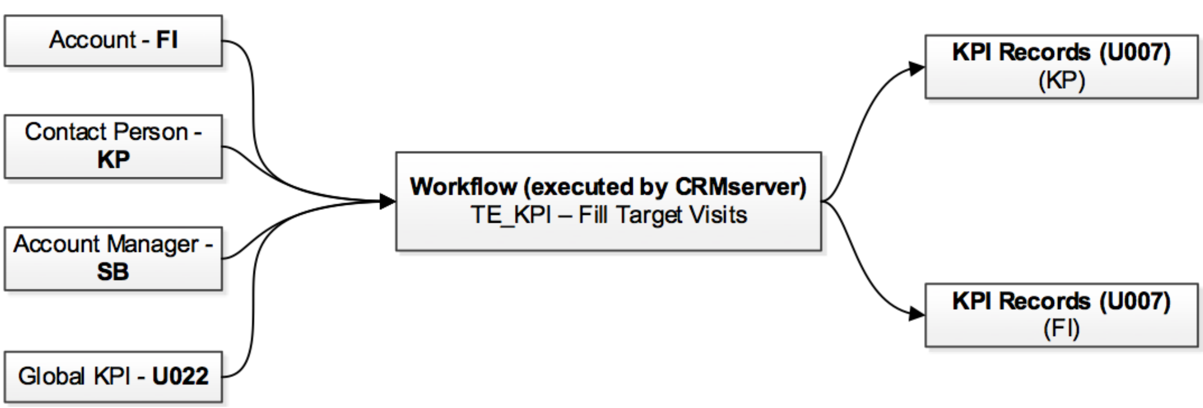
This workflow is called by a TD record and executed by the CRM.server.

Process:



Prcesses within the workflow: **TE_KPI - Fill Target Visits**

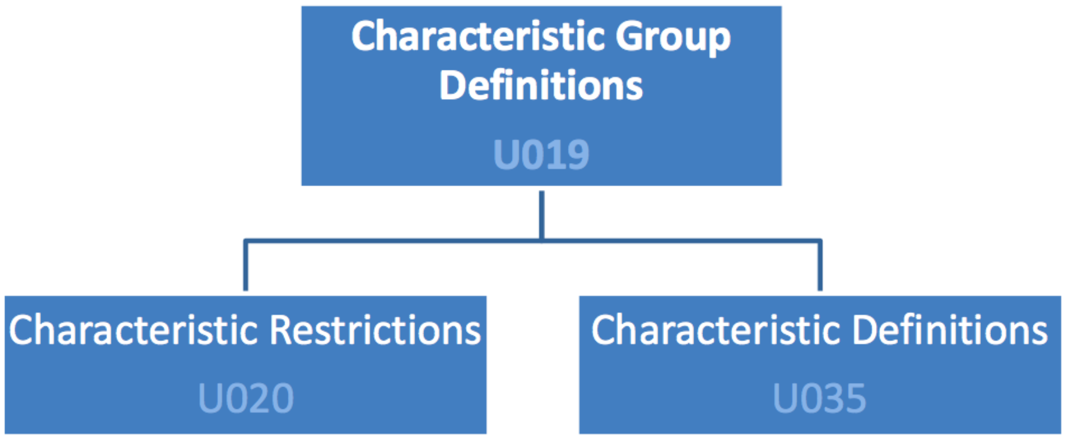
Workflow process number	Description
1	The first process starts the workflow and only calls the next process -> 2.
2	This step loops over all existing account manager. Only SB records where the business areas is filled is used for further calculations. For each valid account manager the next process is number 3.
3	This process searches for all KPI records where the “Starts on” <= Actual Date and Ends on < Actual Date field . Furthermore, only KPI records with the same business area like the current SB record (determined previously) is used for further calculations.



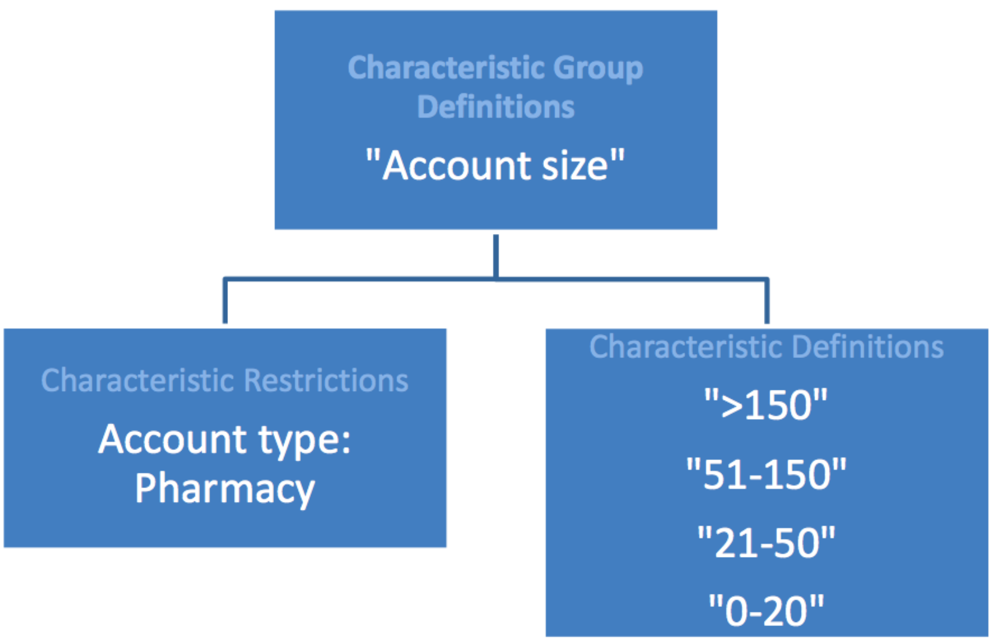
Characteristics (IT)

Overview

Characteristics are used to create an overview of company or person interests. Basically an admin can define different characteristics groups with different restrictions and items. In Characteristics Restrictions you can define if groups are person-related or company-related (or both). You can also define the person and the account type. In Characteristics Definitions you can define different group items.



For example:



So in this example only a company with the “Pharmacy” account type sees this group with its items!

Callable from:

1. These groups and items are accessible via a company or person tree view, “Characteristics” node if you click on “New”. A popup is displayed with all available groups and items for the parent FI or PE.
2. Application menu > Settings > Maintenance > Characteristic Definitions.

Buttons

• TE_IT_CharacteristicTree_Close

Calls the “TE_A032_UPD_ReleaseExpenses” trigger. Is used in the search result header on the start page to set a submitted month to “approved”.

• TE_IT_NewCharacteristics

Menu actions

• TE_ID_NET_CharacteristicDefinitions

The main application menu action which is used in the application menu for calling the “TE_A032_ExpensesManagement” process.

Forms

• TE_Characteristics_Tree

• TE_AdministrateCharacteristics

Triggers

• TE_IT_UPD_Characteristic Date (key) empty

Info area: IT ; Action: edit/update

This trigger is called in the **TE_SR_Template Main – LSI** rights in the IT info area under **New**.

• TE_FI_UPD_CallWFCalculateIntimacy/Potential

Info area: IT; Action: edit/update

This trigger is called in the **TE_SR_Template Main – LSI** rights in the IT info area for **New, Update** and **Delete** if the **KP-StaNo** field is **null (empty)**.

• TE_KP_UPD_CallWFCalculateIntimacy/Potential

Info area: IT; Action: edit/update

This trigger is called in the **TE_SR_Template Main – LSI** rights in the IT info area for **New, Update** and **Delete** if the **KP-StaNo** field is not **null (empty)**.

Server-Side

Beside all client-side code there also are some cs files. Basically, these files are used to generate the xml structure which is shown as a tree view on the client.

• BuildCharacteristicsTree.cs

• GroupItemNode.cs

• GroupNode.cs

• Settings.cs

Variables

- TE_CharacteristicGroupDefinitions.ConditionAccess

  This variable allows the access to characteristics group definition for users, groups etc.
- TE_Characteristics.ConditionAccess

  This variable allows the access to characteristics group definition for users, groups.
- TE_Characteristics.ConditionNewUpdateDelete

  This variable allows the access to characteristics group definition for users, groups, etc.

Relationship Management (CRM #50001400)

Learn to create relationships between info areas and list them.

Relationships (PB)

Overview

Creating a relation is only possible between FI-FI, FI-PE, PE-FI, or PE-PE. We are not considering relationships to the CP info area!

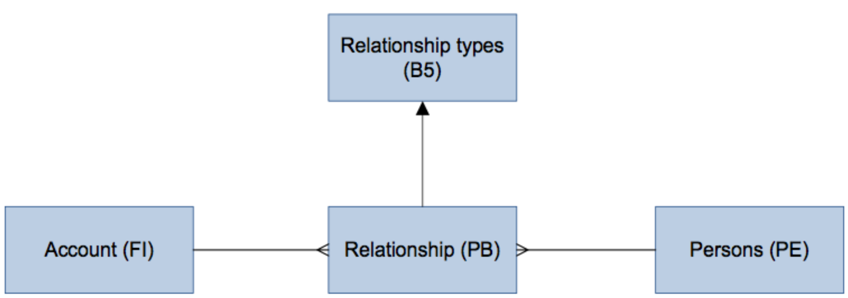
B5 records can now be administered from the application menu for the administrator (Admin role).

The template is using catalog 21 and 404 and we renamed them to “Relationship” and “Relationship Category”.

Catalogs and Values Delivered in LSI Template Release

Supplier&Dealer, Personal relationships, etc.

Filter for categories when creating new relations (process).



Relationships (PB) can be found both in the FI tree as well as in the PE tree. They were implemented using forms combined with filter masks. In headers there are filter sets to filter out records of certain types of relationships. There is a process that comes from the product for creating new relationship records.

Used Buttons to invoke filters

• TE_PB_Associations

• TE_PB_GeneralRelationships • TE_PB_HCO

• TE_PB_HospitalStructure

• TE_PB_LevelHigh

• TE_PB_LevelLow

• TE_PB_Listings

• TE_PB_PersonalRelationships • TE_PB_SupplierDealer

• TE_PB_ClearFilter

Used Filters

• PB.TE_Associations

• PB.TE_GeneralRelationships • PB.TE_HCO

• PB.TE_HospitalRelationships • PB.TE_LevelHigh

• PB.TE_LevelLow

• PB.TE_Listings

• PB.TE_PersonalRelationships • PB.TE_SupplierDealer

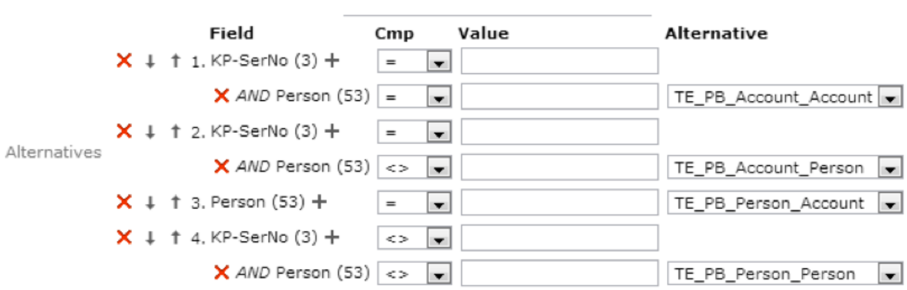
Forms

The template is using 2 different forms. One for FI and the other for PE.

TE_PB_FI-Tree: Used in FI tree to display Account – Account and Account - Person relationships

TE_PB_PE-Tree: Used in PE tree to display Person – Account and Person - Person relationships

Expand Alternatives



Context Menu

The template is using four different context menus.

• 'M_Relationship_Account': Used for FI target-related records. “Go To FI” Action.

• 'M_Relationship_Person': Used for PE target-related records. “Go To PE” Action.

• 'M_Relationship_Expand': never used!!! “Go To FI, PE Used for PB.Expand” Action.

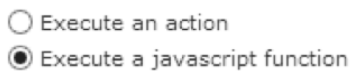
• 'M_Relationship': Menu used for lists. “Go To FI, PE Relationship” Action.

Circle of Influence

The Circle of Influences is callable from the FI tree node “relationship”.

The user is able to list all relationships for a company by clicking on the FI „Relationship“ tree node. The node includes a form with an “onCreate”event (automatically executed by clicking on the FI tree node).

„onCreate“ event (JavaScript code):




```
u8.services.queries.executeExportFromAction
({query: "TE_FI_RelationshipChart",
  link: sender.context.get("rootUid"),
  reportName:"te.lsi//TE_FI_RelationshipDiagram",scope: "Public",
contentDisposition: "inline", targetFrame: sender.context.get("formFrameName"),
  exportFatClientCompatible:"true"});
```

You have to include the following parameters:

- Query: Which query should be used (in our case “TE_FI_RelationshipChart”).
- Link: You get the FI uid through the sender.context.get(“rootUid”).
- reportName: Which “.xslt” should be used to transform the XML.
- targetFrame: Define the name of the targetFrame where the chart should be rendered.

  Queries

- TE_FI_RelationshipChart

  Default query which is called after clicking on the FI „Relationship“ tree node.
- TE_FI_RelationshipChart_Filter_Associations

  Based on the “TE_FI_RelationshipChart” with an additional filter for the ”Associations” relationship category.
- TE_FI_RelationshipChart_Filter_HealthInsurance

  Based on the “TE_FI_RelationshipChart” with an additional filter for the ”HealthInsurcance” relationship category.
- TE_FI_RelationshipChart_Filter_HospitalStructure

Based on the “TE_FI_RelationshipChart” with an additional filter for the ”Hospital-Structure” relationship category.

- TE_FI_RelationshipChart_Filter_Listing

  Based on the “TE_FI_RelationshipChart” with an additional filter for the ”Listing” relationship category.

- TE_FI_RelationshipChart_Filter_PersonalRelationships

  Based on the “TE_FI_RelationshipChart” with an additional filter for the ”PersonalRelationships” relationship category.

- TE_FI_RelationshipChart_Filter_SupplierAndRetailer

  Based on the “TE_FI_RelationshipChart” with an additional filter for the ”SupplierAndRetailer” relationship category.

Forms

• TE_FI_RelationshipChart

The form consists of one TabPanel and two forms (TE_PB_FI-Tree, TE_FI_OnlyRelationshipChart). It is used in the FI “Relationship” tree node.

• TE_PB_FI-Tree

The form consists of a SearchView (TE_PB_Account) and an ExpandView.

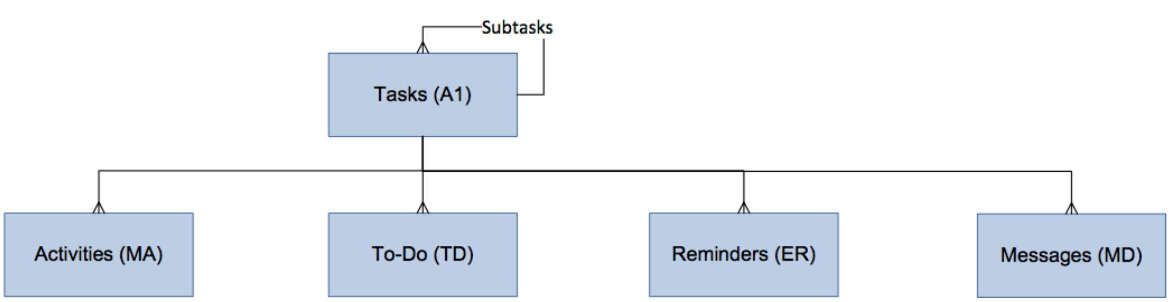
• TE_FI_OnlyRelationshipChart

The form consists of a FormFrame and seven filter buttons.

Tasks (A1) (CRM #1500?)

Find the list of buttons, filters and triggers for task.

Data model



Buttons

- TE_A1_SetStateCompleted
- TE_A1_SetStateMissed
- TE_A1_MyTaskFilter

- TE_A1_MyCompletedTasksFilter
- TE_A1_MyForwardedTasksFilter
- TE_ClearFilter
- TE_A1_NewTask Filters

Filter

- A1.MyCompletedTasks
- A1.MyForwardedTasks
- A1.MyTasks

Triggers

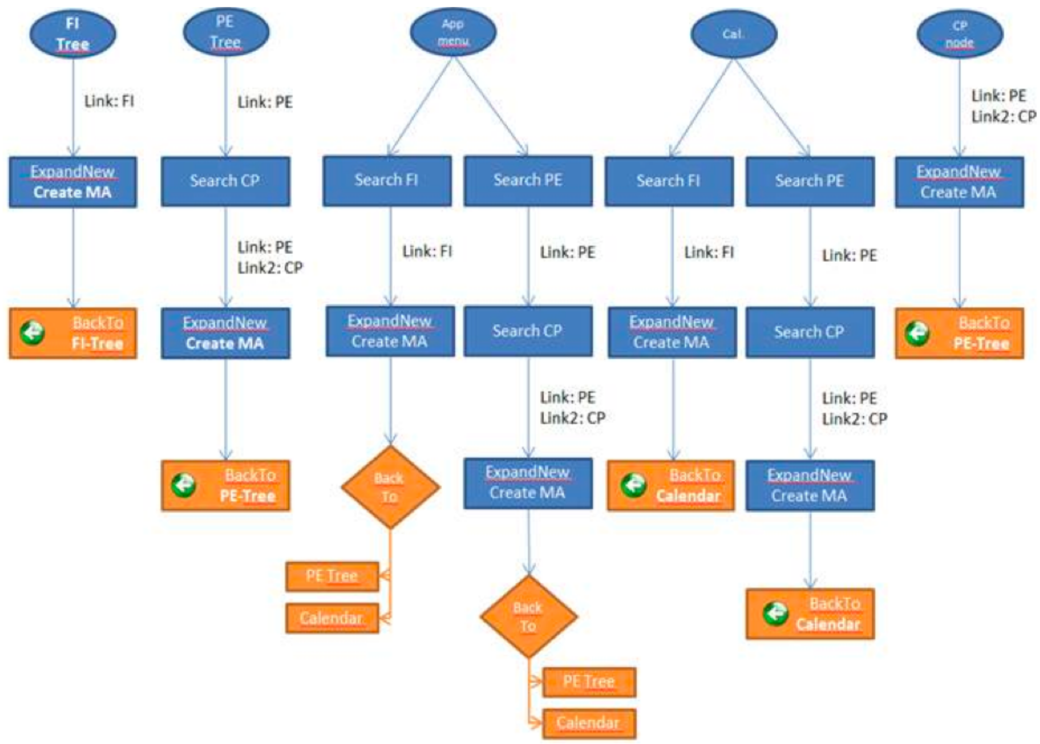
- TE_A1_UPD_setStateCompleted
- TE_A1_UPD_setStateMissed

Activity and Time Management Activities (CRM #11001)

Learn to manage activity and time and plan witsit wit map support.

Activities (MA)

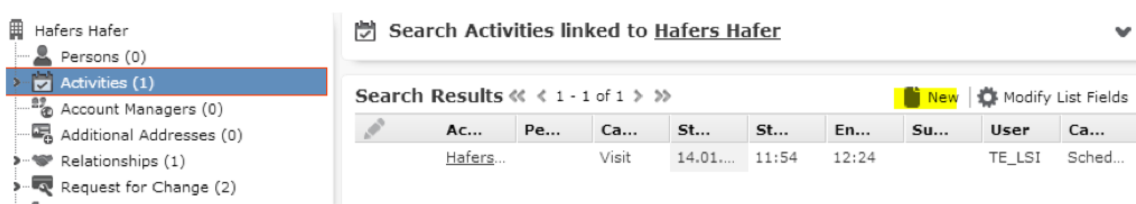
Overview



Callable from

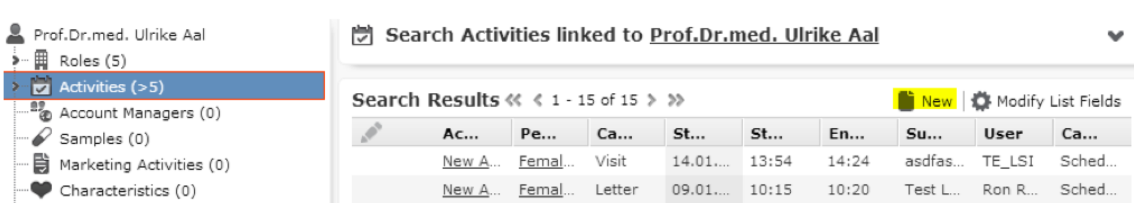
FI Tree – MA node

Here we want to achieve that a MA record is added to a parent FI record. The "NewCommand" button is used to open the new page within the tree and set the link to the company.



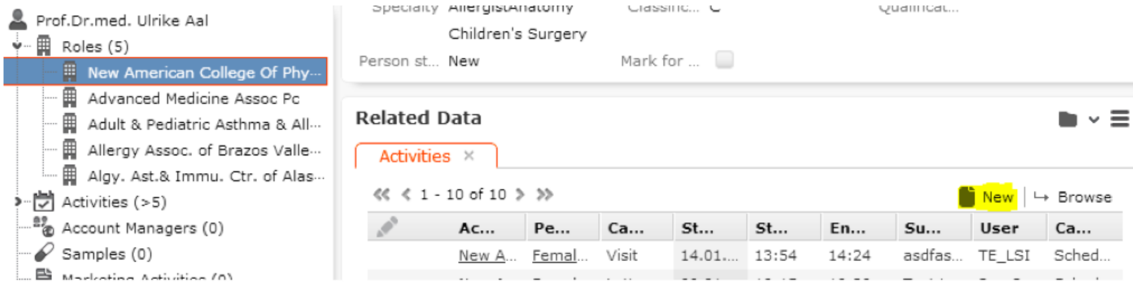
PE Tree – MA node

In this case we want to achieve that a MA record is linked to a parent PE record. For this a new “TE_MA_NewFromPETree” button was created. This button opens the MA process in the corresponding process step.



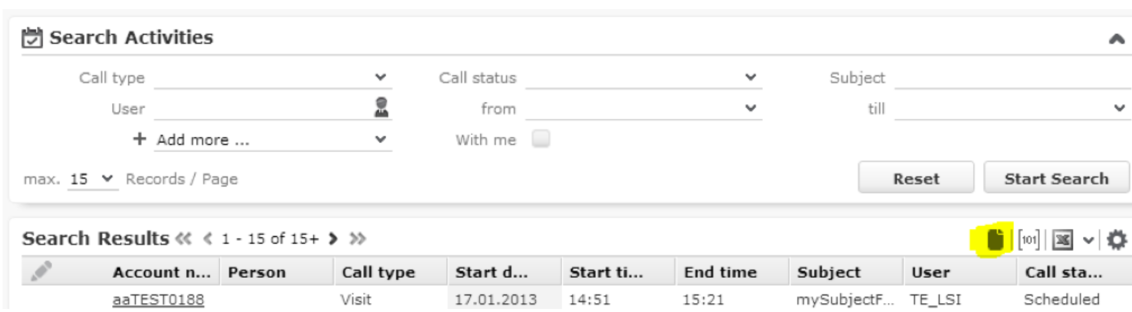
PE Tree – CP node – Related Data MA

Here want to achieve that a MA record is linked to a CP record and a parent PE record. The new “TE_MA_NewFromCPRecord” button was created for this reason. This button opens the MA process in the corresponding process step.



App. Menu – MA Search

Here we want to achieve that a MA record is created with no linked record. You have to walk through the whole MA process where you can choose if you want to create a record for FI or PE.



App. Menu – Calendar View

Here we want to achieve that a MA record is created with no linked record. You have to walk through the whole MA process where you can choose if you want to create a record for FI or PE.

Buttons

• TE_MA_NewFromPETree

Executes the action template.

• TE_MA_NewFromCPRecord

Executes the action template.

• TE_MA_NewFromMASearch

Executes the action template.

Menu actions

Filters

• MA.TE_Accounts

• MA.TE_Complete

- MA.TE_Persons
- MA.TE_Scheduled

Processes

- New Activity

Here you can see the process overview of the new activity process.

- TE_MA_GoAfterSave Process Ask page

  Depending on the variable “ToggleButtonName” one of the 3 conditions can be true and displays the button. This value is set in the steps while choosing the parent record.

Process steps

- TE_MA_Initial

This step is used as initial step and distinguishes whether a record id is selected or not. If there is a record (in this case a CP record) then the next step is “TE_MA_ReadParentRecord”,

- TE_MA_ReadParentRecord

  This step is only responsible for obtaining the parent record from a CP record. So this step is only needed if you click on the new button in a related MA info area of CP. A separate data provider was defined which reads the parent record.

  With “step.get(“DataProvider.$”).uid you get the uid of the requested parent.

- TE_MA_CrotchStep

  This step is dispatching to the next step depending on the passed entry point value. (See created buttons)

- TE_MA_GoAfterSave

  This step is responsible for handling the button events from the process ask page.

  The “ToggleButtonName” value is used in the Process Ask page to differentiate between parent records. (Account, Person or Favourite). Depending on the button event from the Process Ask page the dispatching calls the step for viewing the parent record or the calendar view.

- TE_MA_ViewParentRecord->Exit

  This step is responsible for viewing the parent record of the created activity record. The process ends with this step.

- TE_MA_ViewCalender->Exit

  This step is responsible for viewing the created activity record in calendar view. The process ends with this step.

- CreateContact->ViewRecordOrReturn

  This step creates an activity. Copied to configuration, adds the variable "curRecordUid" which includes the uid from the created activity record in the process storage.

- SelectCompany->CreateContact

  Creates an appointment for a company, copied to configuration, adds the variable "parentUid" which includes the uid from the selected record (parent for the following activity) in the process storage.

  The “ToggleButtonName” variable is used in the Process Ask page to differentiate between which button should be displayed!

- SelectFavorite->CreateContact

  Create an appointment for a favorite entry, copied to configuration, adds the variable "parentUid" which includes the uid from the selected record (parent for the following activity) in the process storage.

  The “ToggleButtonName” variable is used in the Process Ask page to differentiate between which

  button should be displayed!

- SelectPerson->CreateContact

Creates an appointment for a person, copied to configuration, adds the variable "parentUid" which includes the uid from the selected record (parent for the following activity) in the process storage.

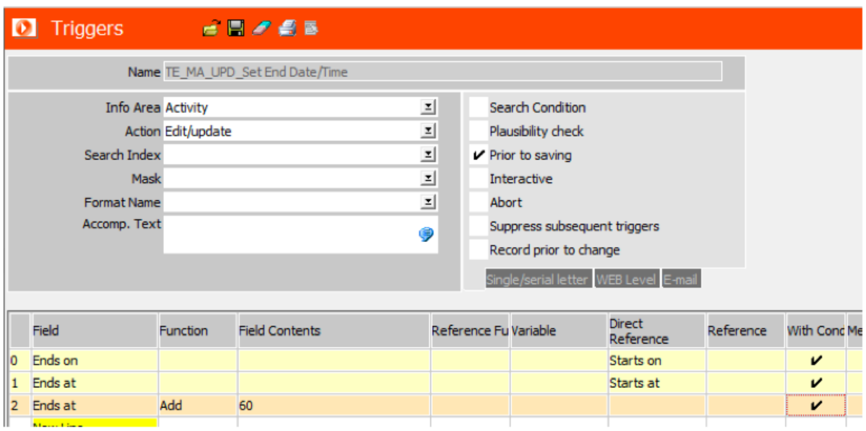
The “ToggleButtonName” variable is used in the Process Ask page to differentiate between which button should be displayed!

Trigger for “Ends on” and “Ends at” Settings (PVCS # 81887)

The TE_MA_DV_Call default value trigger contained the “Ends on” and “Ends at” fields in earlier versions. This caused problems when new activities were added from the calendar.

Note: We have removed the end date and end time from the TE_MA_DV_Call default value trigger. The “ends on” and “ends at” fields are now defined in a separate “TE_MA_UPD_Set End Date/Time” trigger prior to saving on NEW in the station right.

We are adding 60 minutes to the “ends at” time. The condition for the “ends on” and “ends at” fields must be empty.



Other Appointments (A3)

Callable from

- Application menu > Daily business > Other appointment
- Sales start page
- Management start page
- Access via calendar

  New A3 records can also be created via the calendar from the context menu opened either from the “New Calendar Entry” header button or when double-clicking in the calendar area.

  Buttons

TE_A3_SetStatusAccepted

- Calls the “TE_A3_UPD_Set status to accepted” trigger
- Uid = Record

TE_A3_SetStatusDenied

- Calls the “TE_A3_UPD_Set status to denied” trigger
- Uid = Record

Filters

A3.TE_OtherAppointmentsToApprove

- Used on the sales management start page
- Filters all approved or denied other appointments for a user in the next 4 weeks

Queries

TE_A3_MyApprovedOtherAppointments

- Used on the sales start page
- Filters all approved or denied other appointments for a user in the next 4 weeks

Forms

TE_A3_OtherAppointments

- Consists of the SearchView widget and the ExpandView widget below, both based on the A3 field group. It can be accessed using the Daily Business -> Other Appointments application menu entry.

Approval process

- Other appointments in “Holiday” type need approval by superior (manager). Functionality has been implemented in the start pages of sales and sales managers. If managers use the Approve and Reject buttons then they can make a decision about the requested holiday, etc., and the employee is informed about it on his start page.

Call Planning

Technical Intro

This tool is mainly used by sales or technical reps to plan their customer visits in the near future in a fully automated way. The best customers are selected from a large pool of customers based on their priority, actual and target visits, location and opening times.

The aim is to save planning time, optimize driving distances, increase the number of visits per day and make sure that the visit quotas are met.

Quick Setup

- Create the “Use geo-coordinates” parameter (link).
- Fill it with the QueriesInfo XML (link).

PROBLEMS?

If something does not seem to be working correctly check out the Troubleshooting section in the **User Guide**.

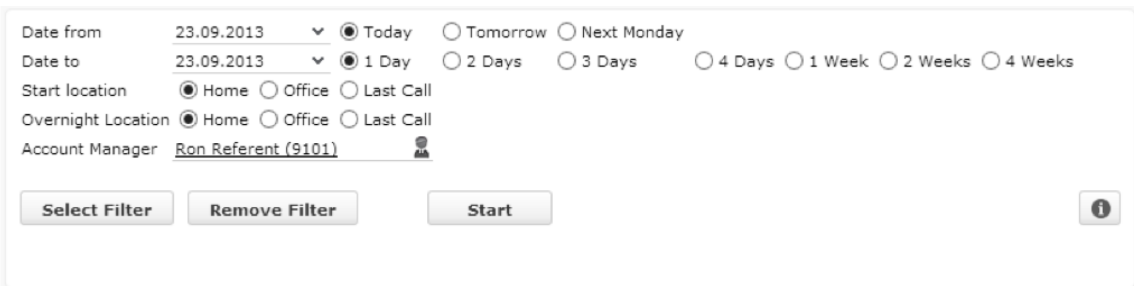
The Call Planning lets you generate an optimized route to visit your customers one or more days in advance. You can also use it to plan the actual day from the actual time onwards, for instance to find the next best customer to replace a canceled meeting.

You are still in control of who you want to visit and when with the Call Planning. It merely suggests the most efficient way so you don’t have to worry about hundreds of different customer opening hours, geographical proximity, or your sales targets. In just a few seconds you are presented with an optimized sequence of suggested activities that you can convieniently see on a map, edit and turn into real activities.

In case you already planned some activities in your calendar, they are taken into account and the suggested activities are geographically optimized. You can use this feature to easily fill your day if you already planned some activities manually but still have some time between them.

Back office employees can also use it to plan activities for other reps if the rights are set accordingly.

Start GUI



Quick start:

1. Select when you want to start.
2. Select the number of days for your route.
3. Select where you want to start from.
4. Select if you want to make a round trip (Last Call).
5. Press Start.

Selecting a Start and End Date

The “Today/Tomorrow/Next Monday” and “1/2/3/4 Days” or “1/2/4 weeks” radio buttons allow you to define the start as well as the end date without directly changing the date fields. You can also edit the date fields.

If “Today” is checked, today’s day is planned starting from the current user’s local client time. Example: If it is 14:30 and you execute the call planning for “today”, then your day is planned from 14:30 on.

Selecting the Start Location

With the “Start location” option you can choose whether your route should start

- from home (address/coordinates must be specified in the ID/user mask),
- or from your office (address/coordinates must be specified in the company related to the ID/user

  mask),
- or from your last call/visit (as specified in your calendar).

The last call is the last call of your calendar just before a given point in time. For instance, if you selected Start location = last call, and you plan your route for today (Monday), then your last call is the last call you did the previous Friday. If you plan that route for 3 days with Overnight location = last call, then when planning the Tuesday, the last call is the last call planned by the Call Planning on Monday. If you start the Call Planning with today and last call, and it’s 11 am, the last call is the one planned for that day at 10 am, for instance.

Planning More than 1 Day

“Overnight location” is used within a multiple day trip to decide from where to start the days from the 2nd day on: home, office or last call.

When planning more than 1 day you can configure not only the start location of your trip but also where you want the 2nd and the following days to start. Select “Last Call” if you want to make a round trip through your territory without starting every day from your home or office address.

Note that if you want to remain flexible with your planning (i.e. if you need to get unexpected high priority activities you need to take care of from time to time), it may be better not to plan to far ahead in time. Instead use the call planning more frequently in order to let it plan “around” your unexpected activities.

Filtering the Pool of Customers to Visit

As a rep you have a set of customers that are assigned to you and that you should visit, probably according to KPIs. It may happen that for a particular trip you want to restrict your visit to a specific area in your territory or to a specific type of customers. You can do this by adding a filter to your customer pool. Possible use cases:

- Visit a specific territory area
- Visit a specific group of customers (by type, revenue, etc)
- Visit customers with a (active) ticket

By clicking “Select Filter” you can load predefined filters or define your own ones in order to restrict the target group.

The „Remove Filter“button removes a selected filter (if present) from the mask and the query editor component. It does not delete the filter from the system.

Starting the Planning Procedure

The “Start” button starts the planning process and leads to a new tab that displays the results from the U005 info area for the specified user. These results can be edited before they are used to create “real” calls (MA).

Bug Reporting

If you encounter problems and need to open a call with the helpdesk, send the content displayed after clicking the “i” (info) button along with the call.

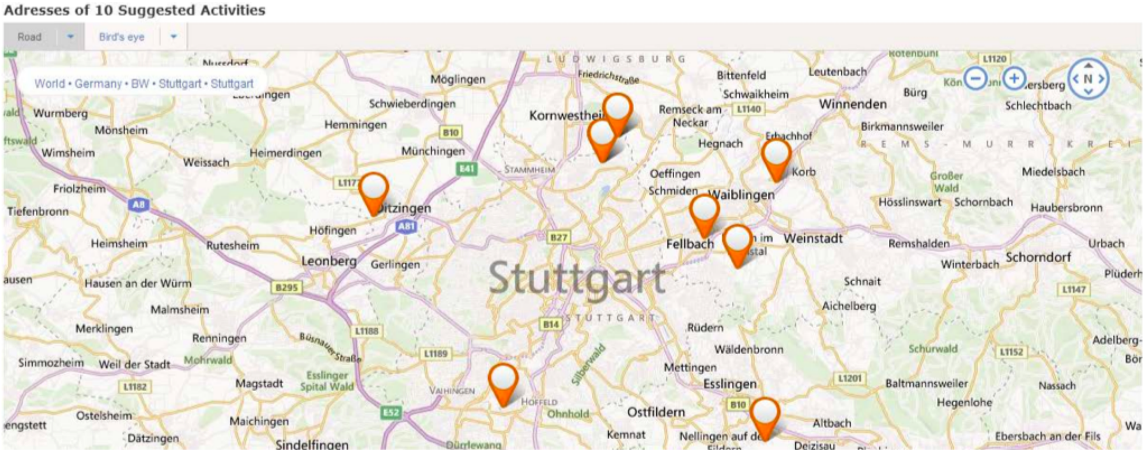
Route Planning GUI

Modify List Fields

	Pl...	Type	Week	Wee...	Starts...	Starts...	Ends at	Account	Person	Subject	User
	☑	Suggested Activity	39	Tuesday	24.09.2013	08:00	08:30	Firma 0010		Created by Call Plan...	Ron Referent (...
	☑	Suggested Activity	39	Tuesday	24.09.2013	09:01	09:31	Firma 0004		Created by Call Plan...	Ron Referent (...
	☑	Suggested Activity	39	Tuesday	24.09.2013	10:03	10:33	Firma 0002		Created by Call Plan...	Ron Referent (...
	☑	Suggested Activity	39	Tuesday	24.09.2013	10:48	11:18	Firma 0002	2 Planning	Created by Call Plan...	Ron Referent (...
	☑	Suggested Activity	39	Tuesday	24.09.2013	11:36	13:30	Firma 0001		Created by Call Plan...	Ron Referent (...
	☑	Suggested Activity	39	Tuesday	24.09.2013	13:45	14:15	Firma 0001	1 Planning	Created by Call Plan...	Ron Referent (...
	☑	Suggested Activity	39	Tuesday	24.09.2013	14:42	15:12	Firma 0007		Created by Call Plan...	Ron Referent (...
	☑	Suggested Activity	39	Tuesday	24.09.2013	15:34	16:04	Firma 0009		Created by Call Plan...	Ron Referent (...
	☑	Suggested Activity	39	Tuesday	24.09.2013	16:23	16:53	Firma 0005		Created by Call Plan...	Ron Referent (...
	☑	Suggested Activity	39	Wednes...	25.09.2013	08:15	08:45	Firma 0008		Created by Call Plan...	Ron Referent (...
		Weekend	39	Saturday	28.09.2013	00:00	23:45			Created by Call Plan...	Ron Referent (...
		Weekend	39	Sunday	29.09.2013	00:00	23:45			Created by Call Plan...	Ron Referent (...
		Last call	40	Monday	30.09.2013	00:00	00:00			Created by Call Plan...	Ron Referent (...

Plan calls

Adresses of 10 Suggested Activities



A few seconds (depending on your system) after you click the “Start” button, a result list with a map is displayed. These are suggested calls: these calls are not yet in your calendar, you can now modify them and choose which ones should be added to your calendar.

Suggested Activities and Placeholders in the Result List

The result list may display the following entries (Type column):

- Suggested Activity: these are the temporary activities or calls that can be transferred to your calendar. The Start, End and Subject fields can be edited. If you modify the start and end times or dates, you need to make sure yourself that the affected calls can still be reached in time.
- Home / Office: a placeholder for the start location. It is only displayed if Home (address defined in the User record “ID”) and / or Office (address defined in the Company “FI” linked to User record) have valid coordinates.
- Weekend / Holiday: a placeholder for the weekends or holidays. Weekend are those days where you don’t work: by default Saturday and Sunday, or as defined in the user mask (ID).
- Calendar activity: an activity already in your calendar. If this activity has valid coordinates, the route is optimized towards it.

Displaying Suggested Calls on the Map

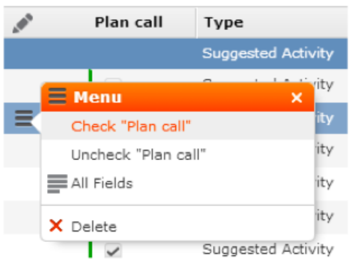
Select one or more suggested activities or calendar activities (using SHIFT or CTRL) to display them on the map.

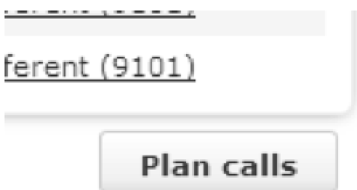
Transferring Suggested Activities to your Calendar

Check the "Plan Visit" box from the **suggested activities that you want transferred** to your calendar and click **"Plan calls"**. You can check the "Plan visit" box:

• using the edit-in-list functionality

• by selecting the activities and clicking on the context menu and selecting "Plan call"





Rep Working Hours

Standard working hours for a user are from 8:00 – 17:00, without lunch break. Saturday and Sunday are defined as non-working days.

The working days and times can be set for each user individually within the user (ID) mask.

- The "Individual working hours" box must be checked,
- For each working day, the hours must be given,
- For non-working days, leave time fields empty.

Note: Morning From is the time when the rep day's starts, i.e. when he leaves his home or office or last call.

Afternoon To is the last possible time at which a rep can be at a call.

In the call planning, a day begins at the chosen start location at the "Morning From" time, but ends at "Afternoon To" with the last call (without the way home). I.e., if you choose "Home" and Morning From = 8:00, then you'll start from your Home at 8:00 (so you won't be at your first visit at 8:00).

Customer Visiting Times

By default, customers are open from 8:00 to 17:00 from Monday to Friday. If the candidate query is configured accordingly, individual visiting times can be configured for each customer.

To define visit times for a customer you can:

- Define no times at all at customer level: default times are used.
- Define one or more days where the customer is open. As soon as the visit times for at least one day are defined, the other days that are not defined are treated as closed.

Definitions

Mode: 1 or 2, indicates whether the call planning is executed with bee-line distance (1), or with street level optimization (2).

Candidates: a set of possible records for the rep to visit. Represents the pool of records from which the Call Planning tool chooses the best elements to visit from.

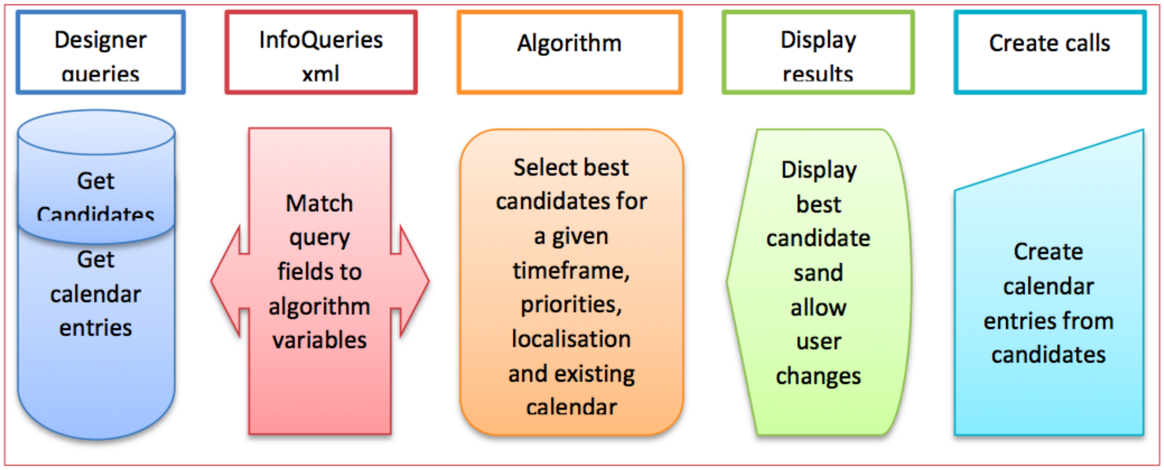
QueriesInfo XML: an XML that defines which designer queries to use for the algorithm and how to assign variables. See below.

Priority bonus: the "bonus" a candidate receives based on its actual-to-target visits and classification. Distance malus: the "malus" a candidate gets from the distance to the previous and next visits.

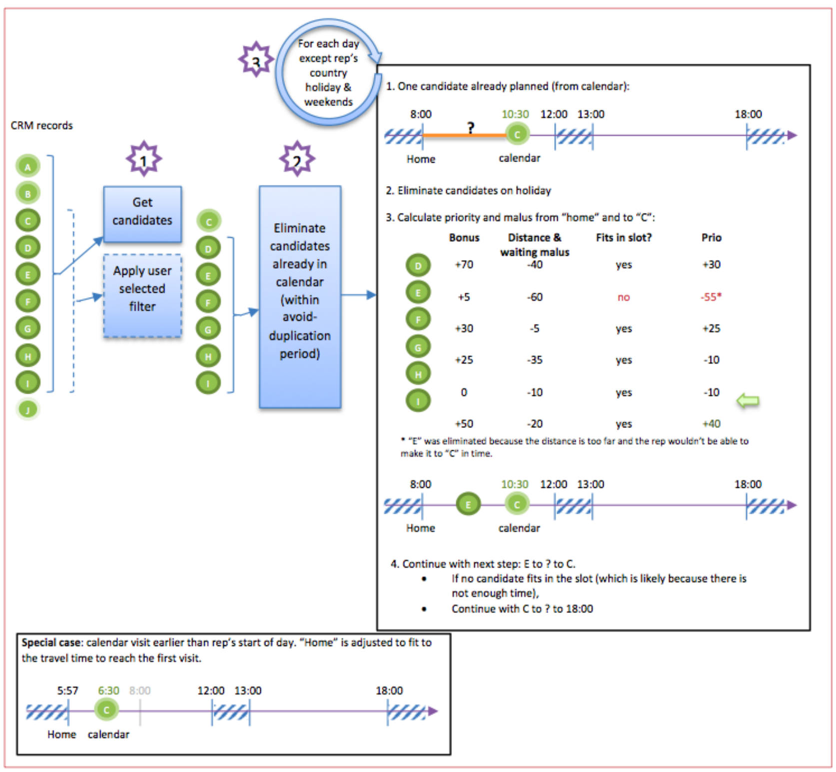
Waiting time malus: the "malus" a candidate gets from the time the rep wastes waiting for the candidate to open (if the candidate is closed / absent at the time the reps arrives).

Overview Workflows

General Workflow Overview

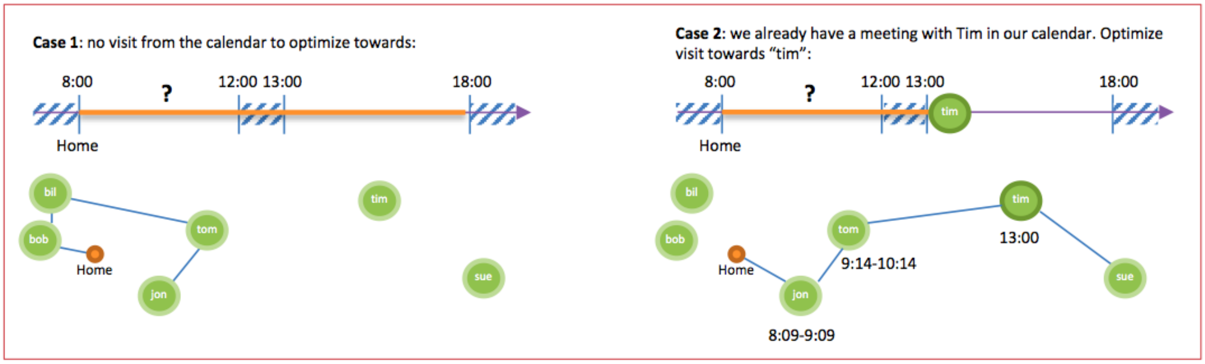


Algorithm Workflow



Distance Optimization Algorithm

To simplify the following example, we assume that all candidates have the same priority and are always open, and that the rep can do 4 visits per day.



For each day except rep's country holiday & weekends

Table shows travel time in minutes:

	Case 1				Case 2		
	Home to…	Bob to…	Bil to…	Etc.	…to Tim	Added travel time*	Jon to… ? …to Tim**
Bil	10	5 ②	-		55	10+55/5=22	27+55/4=40,7
Tim	50	59	55		-	-	-
Tom	20	28	25 ③		30	20+30/5=26	12+30/4=19,5 ②
Bob	9 ①	-	-		59	9+55/5=20	20+59/4=34,7
Sue	70	79	77		25	70+25/5=95	60+25/4=66,2
Jon	11	22	27		40	11+40/5=19 ①	-

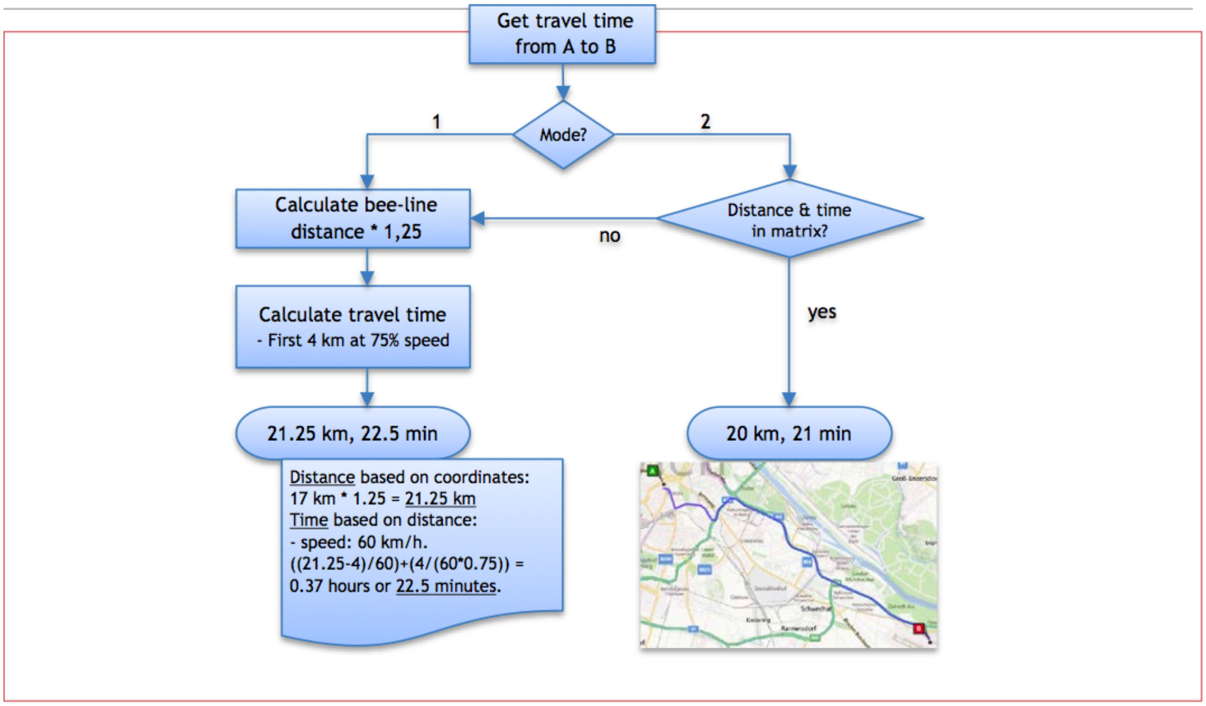
*We add the travel time from Home to the potential candidates and from that candidate to the next planned visit (Tim). Since the meeting with Tim is more than 2 hours away (from 8:00), we divide the distance by the amount of hours between now (8:00) and the meeting with Tim: 13:00-8:00=5 hours.

**To calculate the best candidate we take the distance from Jon and to Tim. We divide that last distance by 4 (13:00-9:09). The meeting with Tom finishes at 10:14 and the rep's break is at 12:00 which leaves 1:46: not enough for another visit in between.

Note: If the visit from the calendar has no coordinates, the algorithm cannot determine the distance and travel time to and from that visit. It is therefore calculated with a distance of 0 which means that no travel time is planned (as if the previous and next visit were at the same place)

Distance and Time Calculation Workflow

The distance and travel time between 2 points can be retrieved from the distance matrix (mode 2) or calculated on-the-fly by the algorithm (mode 1 or as backup in mode 2).



Components

Buttons

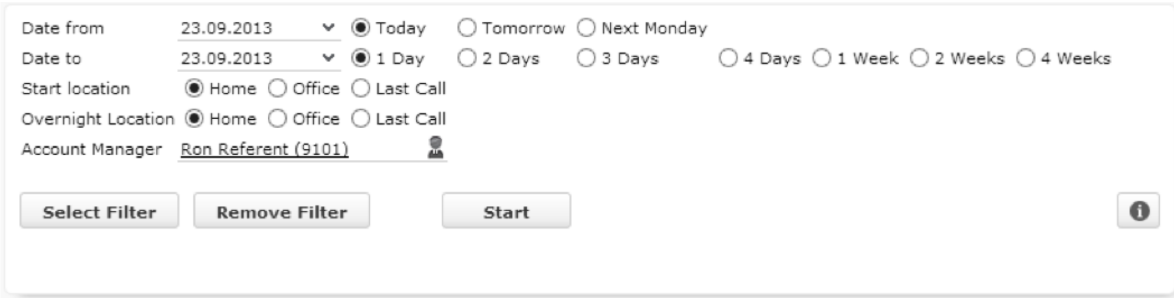
TE_LSI_PB_CallPlanning_CreatePlan

Pla...	Type	Week	Week...	Starts on	Starts at	Ends at	Account	Person	Subject	User
✓	Suggested Activity	39	Tuesday	24.09.2013	08:00	08:30	Firma 0010		Created by Call Planning	Ron Referent (910...
✓	Suggested Activity	39	Tuesday	24.09.2013	09:01	09:31	Firma 0004		Created by Call Planning	Ron Referent (910...
✓	Suggested Activity	39	Tuesday	24.09.2013	10:03	10:33	Firma 0002		Created by Call Planning	Ron Referent (910...
✓	Suggested Activity	39	Tuesday	24.09.2013	10:51	11:21	Firma 0001		Created by Call Planning	Ron Referent (910...
✓	Suggested Activity	39	Tuesday	24.09.2013	11:48	13:30	Firma 0007		Created by Call Planning	Ron Referent (910...
✓	Suggested Activity	39	Tuesday	24.09.2013	13:52	14:22	Firma 0009		Created by Call Planning	Ron Referent (910...
✓	Suggested Activity	39	Tuesday	24.09.2013	14:41	15:11	Firma 0005		Created by Call Planning	Ron Referent (910...
✓	Suggested Activity	39	Tuesday	24.09.2013	15:41	16:11	Firma 0008		Created by Call Planning	Ron Referent (910...
	Weekend	39	Saturday	28.09.2013	00:00	23:45			Created by Call Planning	Ron Referent (910...
	Weekend	39	Sunday	29.09.2013	00:00	23:45			Created by Call Planning	Ron Referent (910...

Plan calls

The „Create Calls“button (located in the table header) processes the route planning on the server- side with all selected entries (“Plan call” column checked)

Main Form



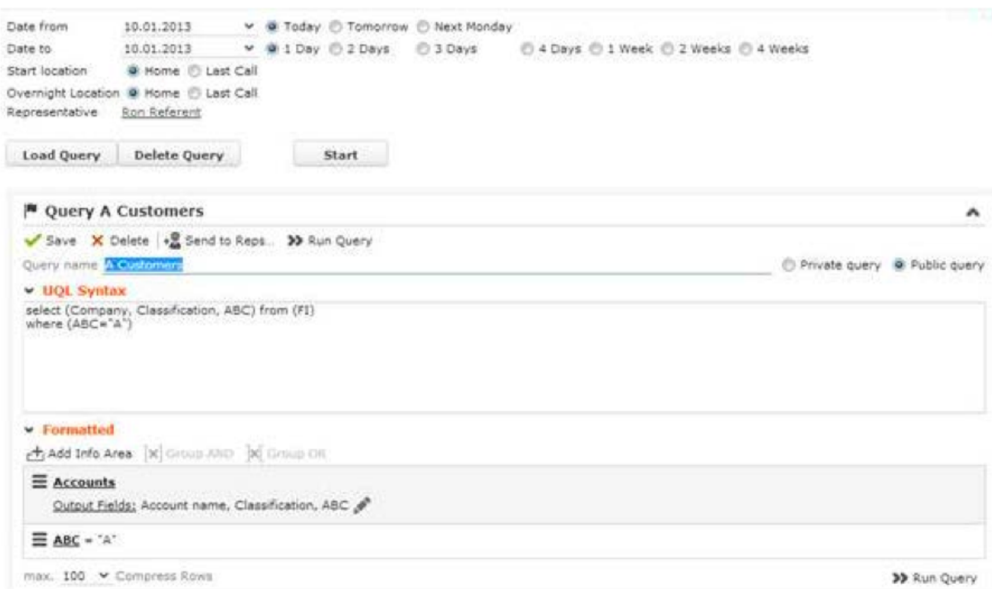
Filters

U005.TE_CallPlaning:

This filter is transferred to the search mask as „FixedFilter“. So only records are shown where the current user equals U005.USER.

Forms

TE_LSI_CallPlanning



Masks

List View U005

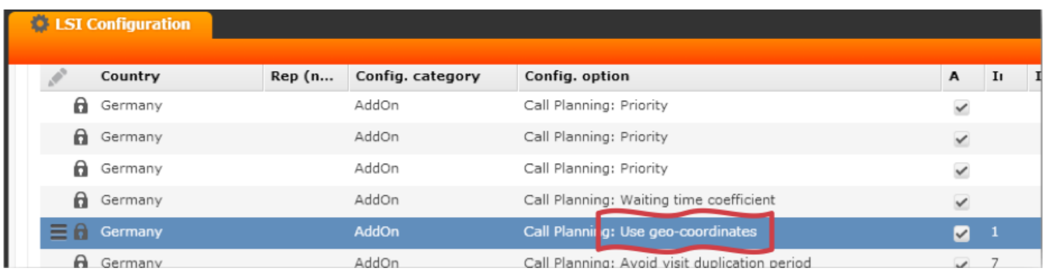
Configuration

Checklist

	Bee-line optimization	Street-level optimization
Param *Use geo-coordinates.mode*	1	2
Param *Use geo-coordinates.queriesInfo*	mandatory	mandatory
Bing maps and geocoding	mandatory	mandatory
Distance matrix	-	mandatory

Where to set the Parameters

Log on as e.g. "SU9501" to set parameters:



How to Set the Parameters

1. Each rep is assigned to a country.
2. The LSI configuration parameters must be set for that country.
3. One or more options can be set for each selected parameter.
4. Some parameters can be defined multiple times per country (like Priority, see screenshot above, because you usually have a value for A, B and C or even more).

If no parameters are set for a rep's country, then the default values is used (see below).

The call planning only works if at least the "Use geo-coordinates" parameter and the "Integer 1" and "Customer parameter" fields are set!

It is recommended to only set the parameters that really need to be changed.

- The first level of the bullets below describes the Config option,
- the second level describes which fields can set.

  Default values in "()".

- **Use geo-coordinates:** set depending on what your system supports (check with your Aurea CRM project manager).
- Integer 1 / Mode: (1) defines if the system has access to geo-coding and route-optimization.
  - 1: geo-coding available, a route-optimization based on bee-line distances is performed.
  - 2: geo-coding and street-level route optimization is performed (distance matrix required).
- Customer parameter / QueriesInfo: (empty) an XML-structured text that set the candidate and calendar queries and assigns variables and filters.
- Logical 1: (unchecked) an optional checkbox that can be checked in order to display information on how the candidates were selected (in each temp call (U005) description).

Note: This information is mandatory. See **Defining the QueriesInfo** parameter.

- Default times: default customer's visiting hours if no custom times defined. o Time 1: start of day (08:00) o Time 2 (optional): end of morning (00:00)

o Time 3 (optional): start of afternoon (00:00) o Time 4: end of day (17:00)

- Call duration: duration of a visit.

  o Integer 1: duration in minutes (30)

- Call time-out: time after a call (i.e. small break).

  o Integer 1: duration in minutes (15)

- Waiting time coefficient: importance you give to wasted time waiting for the customer to open

  (early arrival). A higher number results in less waiting time. o Decimal 1: (1)

- Priority coefficient: importance you give to the priority (see **Algorithm workflow**). A higher number puts the focus on important visit.

  o Decimal 1: (0.2)

- Priority: coefficient that multiplies the priority number obtained with the target and actual visits per year to give them more or less importance (if the user entered an “Indiv. Target/Year”, it is used instead of the standard target/year). This parameter can be entered multiple times, once for each letter of the ABC classification. If a record is not classified, it is designated as “-”. The system uses A, B, and C by default. The coefficient for “-“ being 0 (resulting in a priority of 0).

o Text 1: (A; B; C)

o Decimal 1: (1; 0.5; 0.25)

- Avoid visit duplication period: if “3” is entered, the system gets all customers the rep visited

  in the last 3 days or plans to visit in the next 3 days, and discard them from the possible customers to visit to avoid visiting the same customer twice in that period.

  o Integer 1: duration in days (7)

- Subject: text to be written in the planned calls’ subject.

  o Text 1: (created by Call Planning)

- No planning: if checked, the “Plan Call” checkbox is not checked by default.

  o Logical 1: (unchecked).

- Travel speed (only for bee-line mode): mean speed in km/h the rep is travelling between visits.

- Integer 1: (60)

- Distance coefficient: importance you give to the distance between locations. A higher number results in shorter travel distances (giving less importance to priority).

o Decimal 1: (5)

Note: Decimal separators can be written with a "." or "," depending on your localization settings. Enter the desired number, then save, and check if the number was properly saved!

Release notes:

The main query can now be defined within the designer. The following parameters are deprecated and can be removed: Visit time (switch between visit and open time), User Working Hours (now defined in ID), Max suggestions per time slot (since mode 0 is deprecated).

Defining the QueriesInfo

Overview

This setting must be defined in the "customer parameter" field of the "Use geo-coordinates" parameter (see Configuration Parameters section).

It defines which designer query to use to load the pool of potential records (candidates) the rep must visit as well as the designer query that gets the visits already planned in the rep's calendar.

It is also used to assign variables used by the CallPlanning to the data returned by the queries. Finally it matchs rep-definable parameters to a query's info area and field.

XML structure

```
<QueryInfos>
    <CalendarQuery name="designerQueryName" active="true">
        <Variables>
            <Var name="fromEnum" infoareaAlias="fromQuery"/>
        </Variables>
        <Filters>
            <Filter name=" fromEnum" operator="xxx" infoarea="fromQuery"
fid="fromQuery"/>
        </Filters>
    </CalendarQuery>

    <CandidatesQuery name=" designerQueryName" active="true">
        <Variables>
            <Var name=" fromEnum" infoareaAlias="fromQuery"/>
        </Variables>
        <Filters>
            <Filter name=" fromEnum" operator="xxx" infoarea="fromQuery"
fid="fromQuery"/>
        </Filters>
    </CandidatesQuery>
</QueryInfos>
```

Note: Note: There can be many CalendarQuery and CandidatesQuery elements but only one of each can be active="true".

Variables

The algorithm uses some information from records to calculate the distance between records, their priority and opening time. Since the queries can be freely defined in the designer we need to tell the algorithm where to look for the information.

Calen.: The variable can be used in the Calendar query.

Candid.: The variable can be used in the Candidate query.

Attributes: The attributes that must be defined for a variable.

Calen.	Candid.	Available variables	Attributes	Type	Purpose
x	x	RecId	info areaAlias	n/a	Mandatory. Identifies the info area that holds the unique RecordId for a candidate to avoid duplicates and match candidates to possible records from the calendar. Multiple entries allowed (see example below). The info area (not alias!) from both candidate and calendar queries must match.
x	x	Longitude	info areaAlias, fid	coord	Mandatory if mode = 1 or 2. Assign to thegeo-coordinates fields.
x	x	Latitude			
	x	ActualVisits	info areaAlias, fid	Int	Optional. Used for the prioritycalculation. If defined multiple times, “0” values overwrite preceding ones.
	x	TargetVisits	info areaAlias, fid	Int	Optional. Used for the prioritycalculation. If defined multiple times, “0” values do not overwrite preceding ones.

Cal en.	Ca ndi d.	Available variables	Attributes	Type	Purpose	
	x	ABC	info areaAlias, fid	String or catalog	Optional. Used for the priority calculation.	
	x	OpenWeek-day	info areaAlias, fid	Int	Option al. Use to re-trieve the openin g / visit times.	OpenWeek-Day must be in 1st position of the block! The week-day (1 to 7) to which the times below be-long to.
	x	OpenMor-From	info areaAlias, fid	Time		Morning From time.
	x	OpenMor-To	info areaAlias, fid	Time		Morning To time.
	x	OpenAft-From	info areaAlias, fid	Time		Afternoon From time.
	x	OpenAftTo	info areaAlias, fid	Time		Afternoon To time.
	x	HolFrom	info areaAlias, fid	Date	Option al. Use to re-trieve the holiday s	Holiday start date.
	x	HolTo	info areaAlias, fid	Date		Holiday end date.
x		StartDate	info areaAlias, fid	Date	Always define the Date var before the Time.	
x		StartTime	info areaAlias, fid	Time		
x		EndDate	info areaAlias, fid	Date	Always define the Date var before the Time.	
x		EndTime	info areaAlias, fid	Time		

The variables above can be defined more than once per query. The lower they are in the XML definition, the higher their prio. Meaning the outcome (or value) of the 2nd definition of the variable overwrites the 1st one, the 3rd overwrites the 2nd and so forth.

A higher prio definition of the same variable overwrites the previous one by default if its outcome is not null (i.e. if a records was found). There can be an exception to that rule (as for TargetVisits), see the table above.

Example

Let's say you want your reps to visit FIs or CPs that are linked to an SB and also have a KPI record. The actual visits and target visits used to calculate a record's priority are located for example in the KPI records.

Our query looks like this (kpi = U007):

```
SB
        With FI
                Plus U007
        Plus CP
                Plus U007
```

And the CandidatesQuery's variables contain:

```
<Var name="ActualVisits" info areaAlias="SBFIU007" fid="5016"/>
<Var name="TargetVisits" info areaAlias="SBFIU007" fid="5015"/>
<Var name="ActualVisits" info areaAlias="SBCPU0071" fid="5016"/>
<Var name="TargetVisits" info areaAlias="SBCPU0071" fid="5015"/>
```

Note: The info areaAlias attribute is the sum of the target info area plus its parents. In our example for the 1st U007 it is SB+FI+U007 = SBFIU007. Note that for the 2nd U007 it is SB+CP+U0071 because it is the 2nd U007 info area in our query.

Since we defined the Actual and TargetVisits for FI before those for CP, the ones for CP has a higher prio, if of course we have a CP record.

Outcome:

Row1: SBFI "companyA", SBFIU007 "xxx", SBCP "personA" , SBCPU0071 "xxx" → read ActualVisits from SBCPU0071
Row2: SBFI "companyA", SBFIU007 "xxx", SBCP *null* , SBCPU0071 *null* → read ActualVisits from SBFIU007
Row3: SBFI "companyA", SBFIU007 "xxx", SBCP "personB", SBCPU0071 *null* → read ActualVisits from SBFIU007

Row1: SBFIU007 and SBCPU0071 are both not null, so SBCPU0071 is used (2nd in variable definition).

Row2 and Row3: SBCPU0071 is null, so SBFIU007 is used.

Filters

Most conditions are defined directly in the designer queries but there are 2 exceptions: in the CallPlanning GUI the rep can choose for whom the CallPlanning should be executed. We need to map the selected User and its BusinessArea to the desired info areas and fields.

Cal en.	Ca ndi d.	Availab le filters	Attributes	Type	Purpose
x	x	RepId	Operator + info areaAlias or info area + fid	User id	Mandatory. Filter records by selected repId.
x	x	RepBu		Catalog	Optional. Additional filter records by selected rep's business area.

Cal en.	Ca ndi d.	Available filters	Attributes	Type	Purpose
x		StartDa te	info areaAlias or info area + fid	Date	Mandatory (performance issues may arise if filter is not set). Limits the selected calendar records to the specified period.

Operator: Can be any of the query operators supported by Aurea CRM, e.g. =, <, <=, etc…

Info areaAlias or info area: If the alias is used, then the condition is only applied to one info area. If info area is used, the condition is applied to all info areas of the given name.

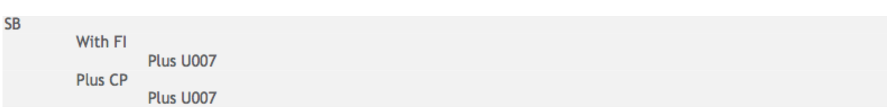
Fid: The field id, e.g. 3 or 5001.

Filter addition: If the same filter is defined many times for one info area (different fields), the filters are added using AND.

Example

If we executed the example above, we would get all records the user can see, plus the user selection from the CallPlanning GUI would not work. To fix that we use filter for the root info area (SB).

Our **query** looks like this (kpi = U007):



And the CandidatesQuery's Filters contain:

```
<Filter name="RepId" operator="=" info area="SB" fid="5"/>
<Filter name="RepBu" operator="=" info area="SB" fid="56"/>
```

Outcome: the user only sees the SB records “where SB.5 = selectedRep.id and SB.56 = selectedRep.bu”.

Candidates Query

Now that we know which variables and filters are available and how they work, we can design the query that provides the algorithm with a pool of records (candidates) from which it selects the best ones (see **Algorithm workflow**).

The query typically consists of:

- A mandatory („with“) info area and one or more optional („plus“) info areas where the coordinates, actual and target visits, and classification information is located.
- An optional info area where the opening times are located (typically “CT”).

  See the full example below.

Calendar Query

The calendar query is used to retrieve the records already planned in the rep’s calendar. They are used:

- as placeholders to block time slots,
- to optimize the distance of potential candidates towards these planned records,
- and to avoid the duplicate planning of records during a given period of time.

Note: You must make sure that the main info area from the candidate query (referenced in the RecId variable) is the same as the info area in the calendar query. The RecId variables from both queries must reference the same info areas (the alias itself can be different).

Full Example

Here is a full example for a candidate query based on SB with mandatory FI and optional U007 (KPI) and optional CT (opening times).

Candidate query (‘TE_CallPlanning_SB_KPI’ as shipped with the LSI template).

```
SB
        With FI where longitude<>0 and latitude<>0
                Plus CT where type=opening times
                Plus CT where type=holiday
                Plus U007
        Plus CP
                Plus CT where type=opening times
                Plus CT where type=holiday
                Plus U007
```

CT: Remember to **filter the type of time** (opening, visit, etc). Otherwise the records of different types overwrites each other. The CT table is used for contact times. If no CT records are found, then the parent record is considered as always open. If a CT record is found for a particular day but has no date defined, the record is considered as closed for that day (open from 0:00 to 0:00). The CT table is also used for holidays. Every record contains a period from-to where the parent is on holiday (closed). When using the Call Planning in mode 1 or 2, always use a where clause for the record holding the coordinates to exclude records with no coordinates (see statement above).

Calendar query (‘TE_CallPlanning_Calendar’ as shipped with the LSI template).

```
MA where status=planed or status=done and type=visit
        With FI
        Plus CP
```

Note: We do not filter out FIs without coordinates since we want to block the time slot anyway. Beware that if a record from the calendar has no coordinates, the algorithm won’t be able to optimize the distance of candidates towards that record.

QueryInfos

See Config parameters on how to save the xml below.

```
<QueryInfos>
    <CalendarQuery name="TE_CallPlanning_Calendar" active="true">
        <Variables>
            <Var name="RecId" infoareaAlias="MAFI"/>
            <Var name="StartDate" infoareaAlias="MA" fid="0"/>
            <Var name="StartTime" infoareaAlias="MA" fid="1"/>
            <Var name="EndDate" infoareaAlias="MA" fid="98"/>
            <Var name="EndTime" infoareaAlias="MA" fid="11"/>
            <Var name="Longitude" infoareaAlias="MAFI" fid="204"/>
            <Var name="Latitude" infoareaAlias="MAFI" fid="203"/>
        </Variables>
        <Filters>
            <Filter name="RepId" operator="=" infoarea="MA" fid="15"/>
            <Filter name="StartDate" operator="=" infoarea="MA" fid="0"/>
        </Filters>
    </CalendarQuery>


    <CandidatesQuery name="TE_CallPlanning_SB_KPI" active="true">
        <Variables>
            <Var name="RecId" infoareaAlias="SBFI"/>
            <Var name="RecId" infoareaAlias="SBCP"/>
            <Var name="ActualVisits" infoareaAlias="SBFIU007" fid="5016"/>
            <Var name="TargetVisits" infoareaAlias="SBFIU007" fid="5015"/>
            <Var name="TargetVisits" infoareaAlias="SBFIU007" fid="5028"/>
            <Var name="ABC" info areaAlias="SBFIU007" fid="5029"/>
            <Var name="ActualVisits" infoareaAlias="SBCPU0071" fid="5016"/>
            <Var name="TargetVisits" infoareaAlias="SBCPU0071" fid="5015"/>
            <Var name="TargetVisits" infoareaAlias="SBCPU0071" fid="5028"/>
             <Var name="ABC" info areaAlias="SBCPU0071" fid="5029"/>
            <Var name="Longitude" infoareaAlias="SBFI" fid="204"/>
            <Var name="Latitude" infoareaAlias="SBFI" fid="203"/>
            <Var name="OpenWeekday" infoareaAlias="SBFICT" fid="9"/>
            <Var name="OpenMorFrom" infoareaAlias="SBFICT" fid="10"/>
            <Var name="OpenMorTo" infoareaAlias="SBFICT" fid="11"/>
            <Var name="OpenAftFrom" infoareaAlias="SBFICT" fid="12"/>
            <Var name="OpenAftTo" infoareaAlias="SBFICT" fid="13"/>
            <Var name="OpenWeekday" infoareaAlias="SBCPCT2" fid="9"/>
            <Var name="OpenMorFrom" infoareaAlias="SBCPCT2" fid="10"/>
```

```
            <Var name="OpenMorTo" infoareaAlias="SBCPCT2" fid="11"/>
            <Var name="OpenAftFrom" infoareaAlias="SBCPCT2" fid="12"/>
            <Var name="OpenAftTo" infoareaAlias="SBCPCT2" fid="13"/>
            <Var name="HolFrom" infoareaAlias="SBFICT1" fid="5000"/>
            <Var name="HolTo" infoareaAlias="SBFICT1" fid="5001"/>
            <Var name="HolFrom" infoareaAlias="SBCPCT3" fid="5000"/>
            <Var name="HolTo" infoareaAlias="SBCPCT3" fid="5001"/>
        </Variables>
        <Filters>
            <Filter name="RepId" operator="=" infoarea="SB" fid="5"/>
            <Filter name="RepBu" operator="=" infoarea="SB" fid="56"/>
        </Filters>
    </CandidatesQuery>
</QueryInfos>
```

Var RecId: Both queries have 2 of them:

- CalendarQuery: MAFI (if you want to plan your visits CP-related as well you have to add also MACP)
- CandidatesQuery: SBFI and SBCP

  First comes FI then CP. That means that if a CP record exists, the candidate has the recId of CP (CP overwrites FI), else the recId of FI. The algorithm uses that recId to match candidates to calendar entries and elimate candidates that where already selected.

  Therefore, make sure that both queries are referencing the same info areas in the same order. The info areaAliases may be different as in our example.

Distance Optimization

In order to enable the distance optimization modes (1 or 2), the latitude and longitude information must be saved within the info area's records as defined in the queries above. The coordinates of the reps (ID) and rep's FI also need to be set if the reps want to use the start and overnight locations “Home” and “Office”. The coordinates can be generated and updated by Bing, for which a separate license is required.

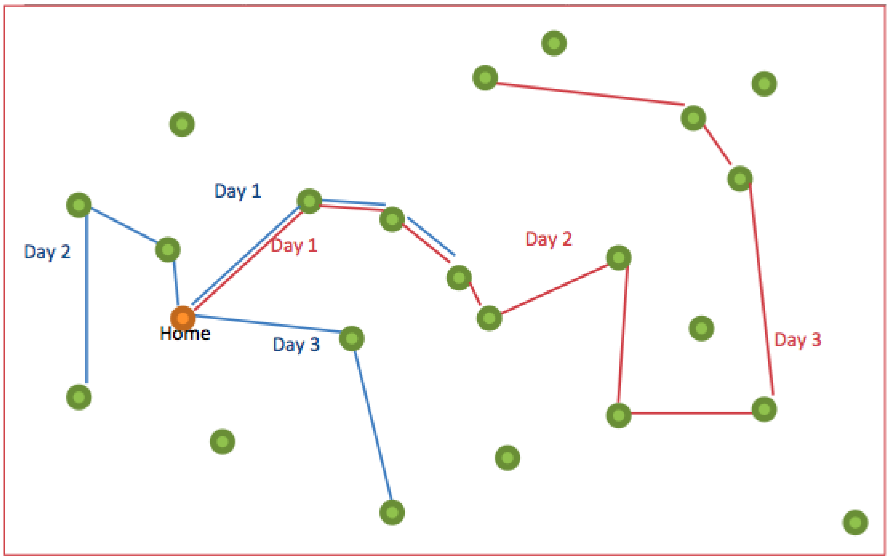
Calculation Distance Starting Point:

The distance optimization needs to take into account from which location the rep starts his day. The “Start location” describes the starting point of the first day in the route, while “Overnight location” is the starting point for the following days of a route.

For example if the rep has a large area to cover, he might want to plan a route for the next 3 days starting from Home, with an overnight location as the last call. Thus, instead of starting each day from his home, he starts from the previous day’s call (meaning he has to sleep in a hotel) which may lead him further away from his home.

The graphic below illustrates the difference between planning 3 days around your Home or as a round-trip:

	Start location	Overnight location
Blue	Home	Home
Red	Home	Last Call



Enabling Street-Level Optimization

To enable street-level optimization (as opposed to bee-line optimization which does not consider the road network):

- The optimization mode must be set to “2”.
- The database holding the distance matrix must be installed and the connection string set in the settings.xml from Aurea CRM web (see Setting up the Distance Matrix).
- The distance matrix DB must be created from the geo-coordinates used in the CRM (see Filling the Distance Matrix).

Setting up the Distance Matrix:

• Add to the configuration.xml as a new node in the <update> section:

<!--

Configuration for the Distance Matrix table containing the from-to coordinates, the distance and time between them.

The entries need to be genereated for the CRM records and imported.

-->

<GeoT ools>

<GeoMatrix>

<ConnectionString>user id=xxx;password=xxx;server=xxx;trusted_connection=no;database=xxx;connection timeout=3</ConnectionString>

<TableName>GeoMatrix</T ableName>

</GeoMatrix>

</GeoT ools>

• Install the DB that holds the distance matrix.

USE [GeoDB]

```
GO
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO
CREATE TABLE [dbo].[GeoMatrix](
[longitude_from] [int] NOT NULL,
[latitude_from] [int] NOT NULL,
[longitude_to] [int] NOT NULL,
[latitude_to] [int] NOT NULL,
[distance] [int] NOT NULL,
[time] [real] NOT NULL,
[createdOn] [smalldatetime] NULL ) ON [PRIMARY]
GO
EXECsys.sp_addextendedproperty@name=N'MS_Description',@value=N'Distance between coordinates in meters' , @level0type=N'SCHEMA',@level0name=N'dbo', @level1type=N'TABLE',@level1name=N'GeoMatrix@level2type=N'COLUMN',@level2name=N'distance'
GO
EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Time between coordinates in minutes' , @level0type=N'SCHEMA',@level0name=N'dbo', @level1type=N'TABLE',@level1name=N'GeoMatrix@level2type=N'COLUMN',@level2name=N'time'
GO
EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Date the distance and time were calculated on' , @level0type=N'SCHEMA',@level0name=N'dbo', @level1type=N'TABLE',@level1name=N'GeoMatrix', @level2type=N'COLUMN',@level2name=N'createdOn'
GO
ALTER TABLE [dbo].[GeoMatrix] ADD CONSTRAINT [DF_GeoMatrix_createdOn] DEFAULT (getdate()) FOR [createdOn] GO
CREATE UNIQUE NONCLUSTERED INDEX [from-to-unique-index] ON [dbo].[GeoMatrix]
(
[longitude_from] ASC,
[latitude_from] ASC,
[longitude_to] ASC,
[latitude_to] ASC
```

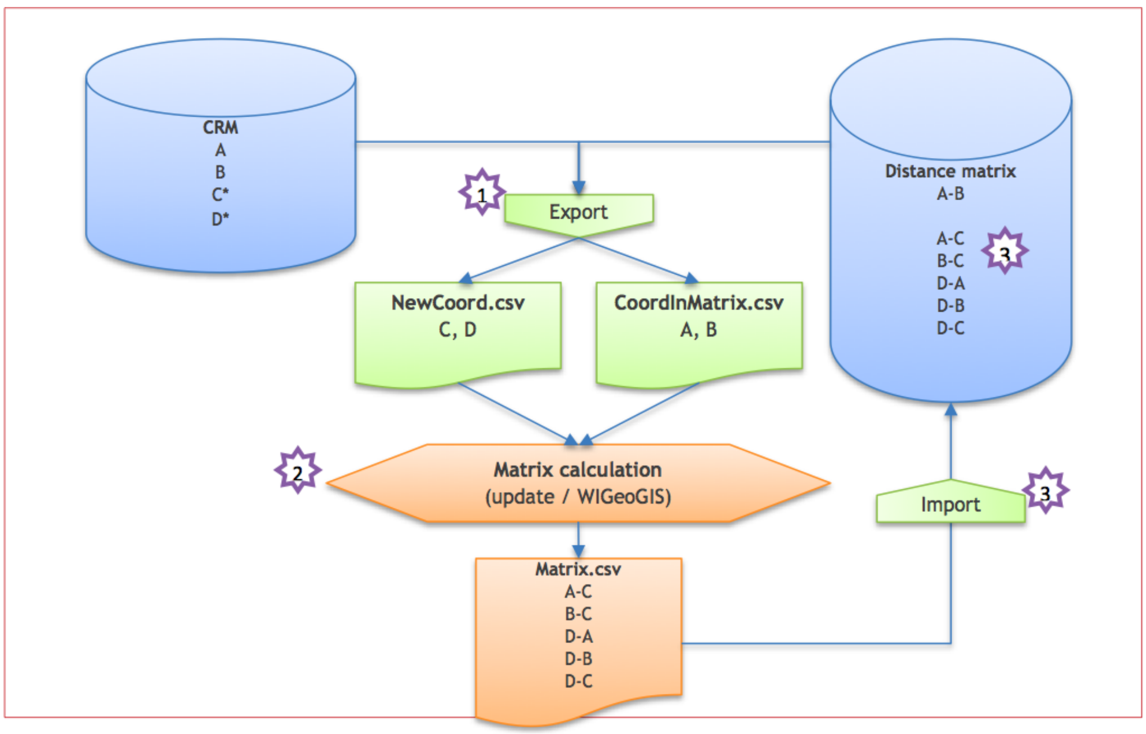
)WITH (PAD_INDEX = OFF, STATISTICS_NORECOMPUTE = OFF, SORT_IN_TEMPDB = OFF, IGNORE_DUP_KEY = ON, DROP_EXISTING = OFF, ONLINE = OFF, ALLOW_ROW_LOCKS = ON, ALLOW_PAGE_LOCKS = ON) ON [PRIMARY] GO

Filling the Distance Matrix

The distance matrix holds all the distances between all points of the info areas relevant for the call planning. The following steps are required to fill the matrix:

1. Customer exports all coordinates from the relevant info areas in 2 packages: those already in the matrix and the new ones.
2. Customer sends the exported coordinates to update for a calculation of the matrix with the information about how far apart the points can be for them to have a connection in the distance matrix (see the chapter Size matters).
3. Aurea CRM sends back the matrix flat file.
4. Customer imports the generated matrix in the distance matrix database.

Aurea CRM takes over the customer's tasks in the SaaS environment. Exports and imports are done with a special tool, see below:



The GeoDbTools.exe

To perform step 1 (export) and step 4 (import), use the update.Template.Base.GeoDbTools.exe provided with the template. Start it with a command line tool. To display the help instructions enter the following:

update.Template.Base.GeoDbTools ?

Before using any other functions, the tool needs to be configured.

Open the update.Template.Base.GeoDbTools.exe.config with Notepad and add a new customer section at the end of <configSections> with your company's name (without spaces or special characters):

```
<configSections>
<section name="myCompany" type="System.Configuration.NameValueSectionHandler"/>
</configSections>
```

Add a new section at the end of the <configuration> section:

```
<myCompany >
<add key="CommonConnectionString" value="connection_string"/>
<add key="CrmDb" value="crm_db_name"/>
<add key="CrmTablesPrefix" value="prefix"/>
<add key="CrmTable_xx" value="fieldLongitude,fieldLatitude"/>
<add key="GeoDb" value="matrix_db_name"/>
<add key="GeoTableName" value="matrix_table_name"/>
</myCompany >
```

1. The section's open and close tags must be named after the section name defined in the <configSections> section.

2. CommonConnectionString: Both the CRM and Matrix databases must be reachable from the same connection string.

3. CrmDb: The name of the CRM database.

4. CrmTablesPrefix: The prefix used in the CRM table names, e.g. “TE_LSI_”.

5. CrmTable_xx: Defines the longitude and latitude fields for a given table. The field names must be the

ones used in the SQL database. Define one entry per table from which to grab the coordinate records.

For instance use <add key="CrmTable_FI" value="Longitude,Latitude"/> to read coordinates from the TE_LSI_FI.Longitude and TE_LSI_FI.Latitude fields. Note that you should also include the ID table that holds the reps' home coordinates.

6. GeoDb: Name of the database where the distance matrix is located.

7. GeoTableName: Name of the distance matrix table.

Exporting the geo-coordinates to generate the distance matrix.

To export the coordinates from your CRM database use the command:

update.Template.Base.GeoDbTools e customer=myCompany

This generates 2 files in the folder where the exe is located:

myCompany_ExportNewCoord_yyy.mm.dd_HHhmm.csv and

myCompany_ExportCoordInMatrix_yyy.mm.dd_HHhmm.csv

Send these 2 files to update for processing.

Importing the distance matrix.

Once the distance matrix was generated (which can take a few days depending on the amount of connections to calculate), it can be imported using the following command:

i customer=myCompany file=Matrix.csv

The matrix can be generated by the tool for testing purposes only.

Instead of providing a street-level distance and travel time, it calculates an approximate time based on the geographical distance between the points:

xm maxkm=1000 file= myCompany_ExportNewCoord_datetime.csv file2= myCompany_ExportCoordInMatrix_datetime.csv

- Maxkm: The maximum distance between 2 points for which the distance should be calculated in the matrix (see the chapter Size matters). If you don't see all expected connections in the generated matrix, the reason could be that the maximum distance is too small.
- File: The *ExportNewCoord*.csv generated by the export command.
- File2: The *ExportCoordInMatrix*.csv generated by the export command. It is optional for initial

  imports where that file is empty (the matrix DB is empty).

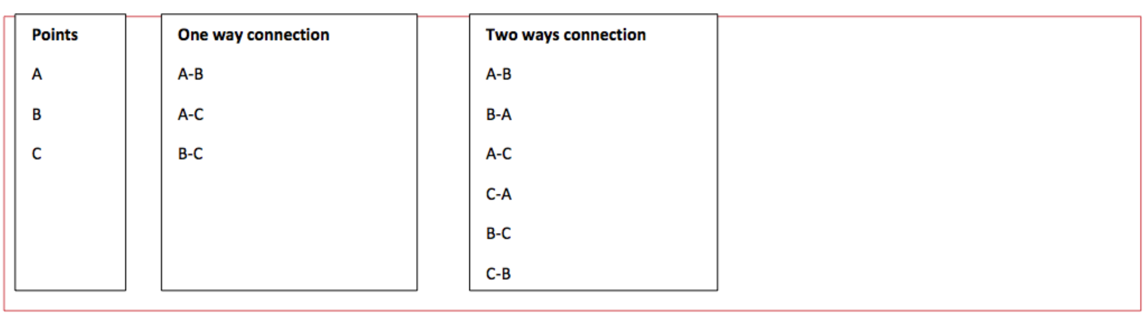
Size Matters

The size of the distance matrix grows exponentially with the amount of points to connect. In order to maintain performance and lower costs (DB hosting), distances should only be calculated one way and the connection between 2 points should only be calculated if the points are close to each other.

For instance, if the info areas relevant for the Call Planning are ID (user), CP (person) and FI (company) and you have 100 ID, 10.000 CP and 2.000 FI, then you have a total of 12,100 points.

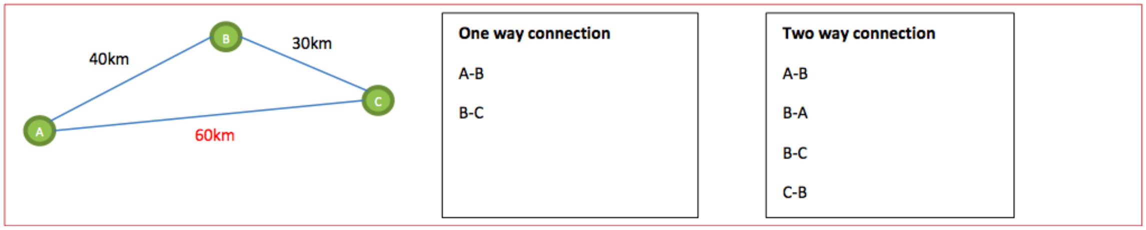
If all those points are connected with each other, you'll get 12,100^2 – 12,100 = 146,397,900 connections if you calculate both ways (going from A to B doesn't necessarily take the same time than going from B to A).

In order to keep the size of the matrix manageable, it is usually enough to calculate the distance from A to B and use the same for B to A. That way we can reduce the number of calculated connections by 2 (=73,198,950).



To further decrease the matrix's size we need to ask ourselves the following question: "What is the maximum distance a rep should travel between 2 visits (in 90% of the cases)?".

If the response is 50km, the matrix only holds distance information for points that are not further away than 50km from each other. In the example below the connections are only saved for A to B and B to C but not for A to C because they are further than 50km apart.



What Happens to Distances that are not in the Matrix?

Due to the fact that we don't save the connection of points that are too far apart and the fact that new points may appear regularly in daily business (or addresses changed), it is always a fact that some points are not referenced in the distance matrix.

When that happens, the call planning simply does a fallback to mode 1 for that particular distance (see Distance and time calculation workflow).

Use Cases

The standard use case covered by the call planning involves users having to visit multiple locations per day without having to schedule a meeting and for roughly the same amount of time.

If your users need to additionally visit specific locations from time to time (for instance if the locations were being assigned a ticket), a filter can be defined (e.g. where location has an open ticket) so that the call planning only chooses locations within that filtered pool. The users can choose whether to start the call planning based on all available locations or only based on the defined filter.

Troubleshooting

NO RESULTS RETURNED

If the call planning returns no results besides "Weekend", make sure of the following:

- The home, office or last call address is not too far away from any of his candidates: if he has to travel longer than his working hours allow him to, no candidate is returned.
- There is not a planned visit in the rep's calendar, for the planning period, which is too far away from the rep's candidates.
- The candidates as defined in the CalendarQuery have coordinates.
- If "Individual working hours" is checked for the rep, the working days have valid working hours

  defined. If no working hours are defined for a given day, this day is defined as close and appears

  in the call planning results as "weekend".
- The "Default times" parameter is either not set at all or set properly: fields are not empty or

  "00:00", "From" is not > to "To".
- The opening times (CT) of the candidates must be either not set at all ("Default times" are used) or

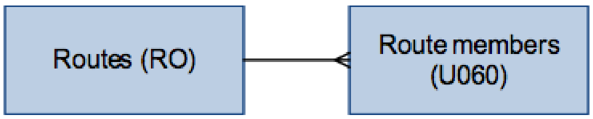
if set, then for each open day. If for instance only 1 day is defined with opening times for a candidate, then all the other days of the week are closed, and the candidate is not considered for those.

DUPLICATE KEY WHILE IMPORTING THE GEOMATRIX

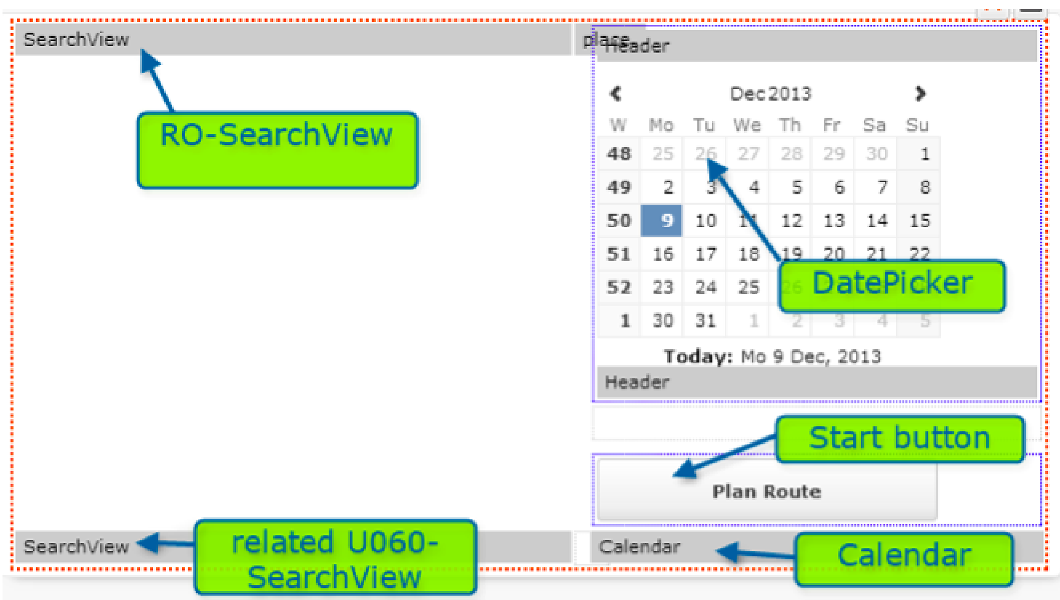
Route Planning

Overview

The data model looks like this:



Route planning is started with the ‘ID_NET_ROUTE_SEARCH’ action which is included in the Daily Business application menu. The action is calling the ‘TE_RO_RoutePlanning’ form which is displaying the following widgets.



Selecting a date in the DatePicker is calling the onValueChange eventHandler which is calling the u8.TeLSI.RoutePlanning.synchronizeCalendar(sender) function;

This function is keeping the DatePicker and the calendar below up to date and sets the view to “workweek”.

The buttonPlanRoute button is calling the u8.TeLSI.RoutePlanning.planRoute(sender) function; which is planning the selected route. The function is reading the selected DatePicker value, reading the selected RO record, checking if U060 records with field.id 5013 (Plan)=checked exist, writing the selectedDate to the RO record and calling the TE_RO_RoutePlanning_CreateMAs workflow.

The workflow loops through all child U060 records and creates MA records for the PlanDate. The workflow currently can only handle a single day but no work weeks. The workflow starts at 8:00 and takes care of the “duration” and “travel time” U060 fields when creating MA records. The calendar widget is updated after execution.

Add Route Members to Route

Basically there is the possibility to add a FI, CP or PE record as a new route member to a route. Therefore there are three different buttons which open a search and list view. There is a button to add the selected records as route members to the route. Multiselect for adding records is possible. You can also double-click the record – the default-action creates a U060 record.

Known Issue

A backoffice user can create routes and participants for other users (e.g. a sales rep). The backoffice user sees all accounts and therefore could create participants, for which the sales rep is not an account manager! If the route is planned for the sales rep or by the sales rep himself, then those participants are not planned because the sales rep cannot see this account due to the right settings.

Buttons

There are three buttons to add data in the U060 search results header.

TE_U060_ToNewFI

This button uses the “Search”.QueryStateAction “CORE_C_CanNew_disabled” action template that is used for disabling the button if there is no FI record selected. Furthermore, the CRMprocess “Route (6018000)” is used.

Argument	Value	Description
Label	Add Account	Textgroup “TE_RO_RoutePlanning”
searchAndListName	TE_FI_RoutePlanning	
createNewTab	false	
link	Linked	
showSearch	true	
autoSearch	true	
createNewPopup	title(TXT_TE_RO_RoutePlanning_0)	Text: Add Account(s) to a Route

TE_U060_ToNewCP

This button uses the “Search”.QueryStateAction “CORE_C_CanNew_disabled” action template that is used for disabling the button if there is no FI record selected. Furthermore, the CRMprocess “Route (6018000)” is used.

Argument	Value	Description
Label	Add Role	Textgroup "TE_RO_RoutePlanning"
searchAndListName	TE_CP_RoutePlanning	
createNewTab	false	
link	Linked	
showSearch	true	
autoSearch	true	
createNewPopup	title(TXT_TE_RO_RoutePlanning_1)	Text: Add Account(s) to a Route

TE_U060_ToNewPE

This button uses the "Search".QueryStateAction "CORE_C_CanNew_disabled" action template that is used for disabling the button if there is no FI record selected. Furthermore, the CRMprocess "Route (6018000)" is used.

Argument	Value	Description
Label	Add Person	Textgroup "TE_RO_RoutePlanning"
searchAndListName	TE_PE_RoutePlanning	
createNewTab	false	
link	Linked	
showSearch	true	
autoSearch	true	
createNewPopup	title(TXT_TE_RO_RoutePlanning_2)	Text: Add Account(s) to a Route

TE_U060_AddToRoute

This button is used to call the javaScript function for creating new U060 records.

Argument	Value	Description
Label	Add to route	Textgroup "TE_RO_RoutePlanning"
searchAndListName	u8.TeLSI.RoutePlanning.createU060records($)	
Uid	Linked	The RO record.

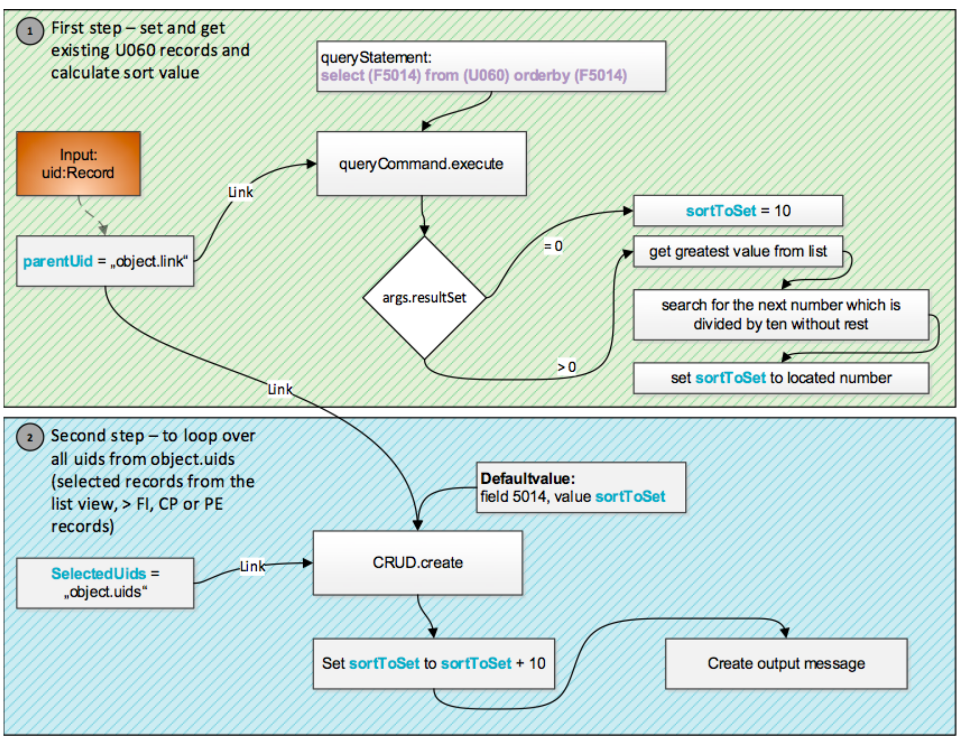
Argument	Value	Description
Query State Action	C_RowsSelected	This query state action allows us to make sure that there is at least one record selected in the list and passed to the javaScript function.

The buttons are referenced by the following headers:

TE_CP_RoutePlanning.SearchResultsLinked
TE_FI_RoutePlanning.SearchResultsLinked
TE_PE_RoutePlanning.SearchResultsLinked

“createU060records” JavaScript function

The following picture shows how the javascript function works. We generate the U060 records using the CRUD channel.



Variables (Z5) and Variable Value (Z6)

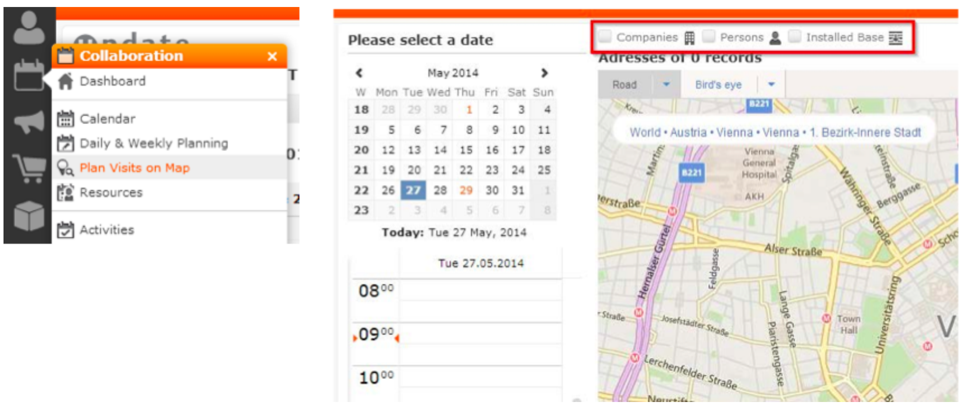
Please define the variable values (Z6) for your customer’s station. Currently it is only defined for station 10002 with value 30.

Variable Name	Description
TE_RoutePlanning_U060_Duration	Default Duration (min) for U060 records - used in TE_U060_DV Trigger
TE_RoutePlanning_U060_TravelTime	Default Duration (min) for U060 records - used in TE_U060_DV Trigger

Visit Planning with map support

You can use this feature using two different entry points:

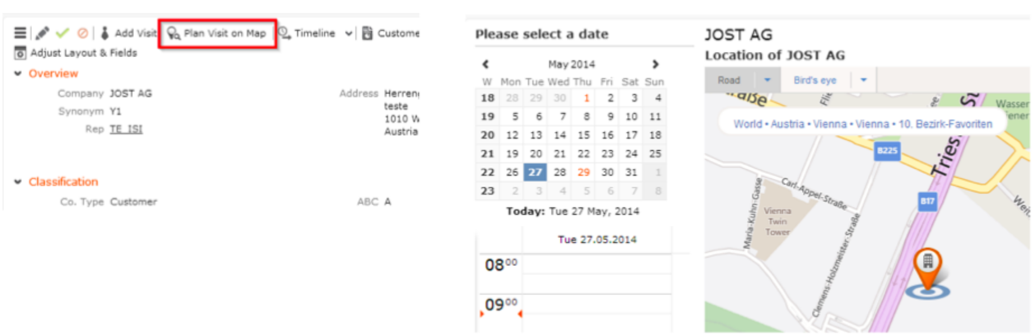
From the main menu for general usage:



Here you can see all activities today and you can select companies, persons and installed bases which you also want to see on the map, to have a general overview.

This view uses the menu ‘CORE_ID_NET_GeoPlanVisits’ which calls the form ‘CORE_GeoPlanVisits’.

You can also open the map from a company, person or installed base to have the selected record in focus:



The selected record is in focus and you can plan your visit with the calendar on the left side.

The button which is used is ‘CORE_GeoPlanVisit’ which calls the form ‘CORE_A_GeoPlanVisit’.

The jscript used is ‘..\scripts\te.base\basegeoplanvisit.js’, the following queries are used to select which records are shown on the maps:

- TE_FI_GeoPlanVisit
- TE_IB_GeoPlanVisit
- TE_KP_GeoPlanVisit
- TE_MA_GeoPlanVisit

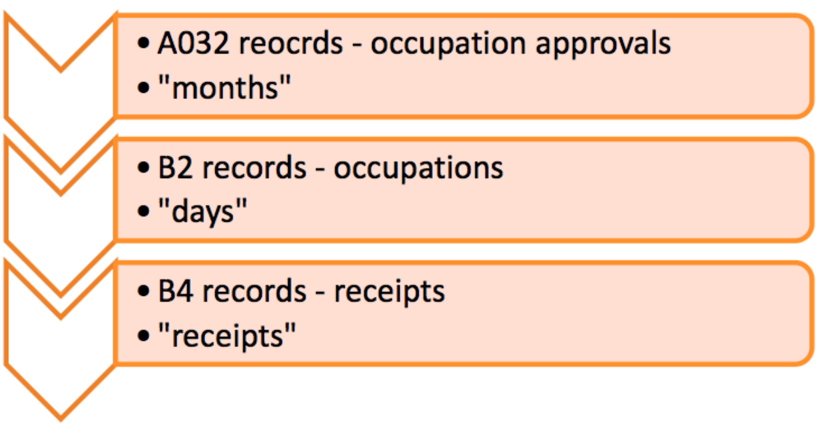
Tip: You can adapt these queries to further filter the results, but make sure that the fields which are already defined in the query, stay in the same order!

Occupation Management Process

Learn to manage occupation.

Overview

Basically the occupation management process can be used by every user to create records for a month (A032 record). Below there are B2 records which represents single days. To each day there can be added random B4 records, which represent expenses receipts.



There is a 1-n link between A032 and B2; B2 and B4 in the data model.

Callable from

1. Application menu > Daily business > Occupation Management
2. Management start page

Buttons

- TE_A032_ApproveMonth [CRM: (70000700)]

  Calls the “TE_A032_UPD_ReleaseExpenses” trigger. Is used in the search result header on the start page to set a submitted month to “approved”.

- TE_A032_ExpensesManagement_Back [CRM: (70000700)]

Execute the “Command” action template with the “Proceed.Back” command. This command is used on several masks within the process to jump back a process step.

- TE_A032_ExpensesManagement_New [CRM: (70000700)]

  Calls the “TE_A032_Expenses_SelectYearAndMonth” form to create a new month in the process phase.

- TE_A032_ExpReport [CRM: (70000700)]

  Calls the “TE_A032_ExpReport” query and creates the report as PDF in a separate browser tab.

- TE_A032_RejectMonth [CRM: (70000700)]

  Calls the “TE_A032_UPD_RejectExpenses” trigger. Is used in the search result header on the start page to set a submitted month to “rejected”.

- TE_B2_ExpensesManagement_Submit [CRM: (70000700)]

  Calls the “u8.TeLSI.QueryStates.checkSubmitPermission($.source)” JS function. This function calls the “TE_A032_SetStatusToSubmitted” trigger which sets the A032 approval status to submitted.

- TE_A032_UpdateRecords [CRM: (70000700)]

  Calls the “u8.TeLSI.QueryStates.updateB2reocrds()”JS function. This function calls the “TE_Expenses - Update Records_v3” workflow.

- TE_B2_ExpensesManagement_UpdateRecords [CRM: (70000700)]

  Calls the “TE_Expenses - Fill Occupation” workflow. This workflow updates all existing A3, U011 and MA records to the selected month in phase 2.

- TE_B4_NewFromExpensesManagement [CRM: (70000700)]

  Executes the “Command” action template with the “Proceed.NewB4” command. This command is used in phase 2 if a user wants to create a new receipt.

Menu Actions

- TE_ID_NET_ExpensesManagement [CRM: (70000700)]

  The main application menu action which is used in application menu for calling the

  “TE_A032_ExpensesManagement” process.

- CORE_A_B2_Workflow_CreateMonth [CRM: (70000700)]

  Calls the “CORE_A023_Generate_B2_for_Month” workflow. This workflow creates an A032 record and all B2 child records.

- TE_A_A032_CallTriggerSubmit [CRM: (70000700)]

Calls the “TE_A032_SetStatusToSubmitted” trigger. This trigger is used in the “checkSubmitPermission” JS function and sets the status of an A032 record to submitted.

- TE_A_A032_ChekSubmitPermission [CRM: (70000700)]

  Calls the “u8.TeLSI.QueryStates.checkSubmitPermission” JS function. Action for checking if A032 records have been created by the currently logged in user. An error message is displayed if this is not the case. TE_A_A032_ClosePopUp

- TE_A_A032_OpenRecord [CRM: (70000700)]

  Execute the “Command” action template with the “Proceed.OpenA032” Command. This command is used in phases 1 and 3 to open A032 records by double-clicking or opening the action in the context menu within the process as a separate step.

- TE_A_A032_OpenRecordInProcess [CRM: (70000700)]

  The main context menu action which is used in the context menu for calling the “TE_A032_ExpensesManagement” process.

- TE_A_B2_UpdateRecords [CRM: (70000700)]

  Action which is executing the 'TE_Expenses - Update Records_v3' workflow to update all current B2 records with Activities (MA), Other Appointments (A3) and Call Expenses (U011).

- TE_A_B4_OpenFromExpensesManagement [CRM: (70000700)]

  Action which is executing the 'Proceed.OpenB4' command which is used in the expenses management process to open B4 records from sublist.

Filters

- A032.TE_A032_Expenses_Phase1

  Used in process phase 1 to show only new and rejected months.

- A032.TE_A032_Expenses_Phase3

  Used in process phase 3 to show only approved and submitted months.

- A032.TE_ExpensesToApprove

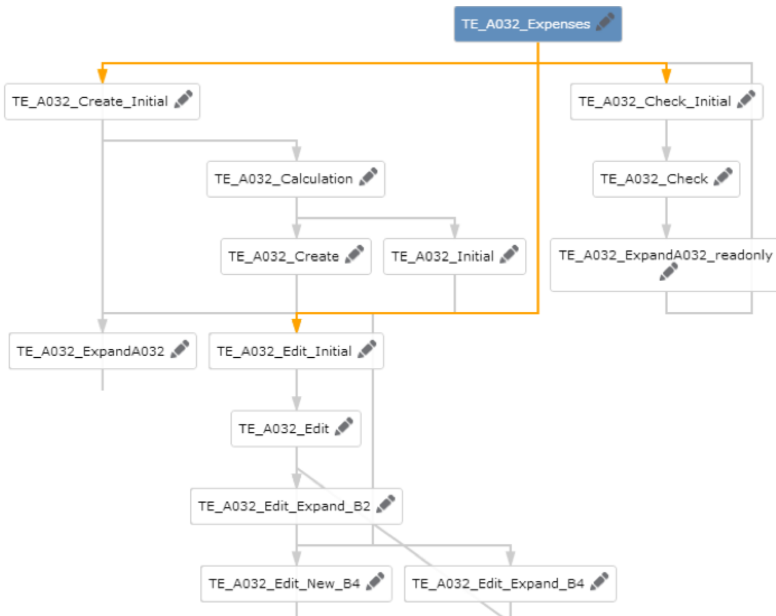
  Used on the start page for superior to filter the list of months which must be approved.

Queries

- TE_A032_ExpReport
- TE_A032_MyExpensesApprovals
- TE_Report_WPR_Expenses

Processes

- TE_A032_Expenses



Process Storage Variables

Name	Description
activePhase	This variable is used in the initial step of each phase. It is used to handle which phase are displayed as active phase.
TXTphase1	$t('TXT_TE_ExpensesManagement_18') Get value from the TE_ExpensesManagement text group at index 18 (“Rejected months:”)
TXTphase2	$t('TXT_TE_ExpensesManagement_7') Get value from the TE_ExpensesManagement text group at index 7 (“Entered days:”)

Name	Description
TXTphase3	$t('TXT_TE_ExpensesManagement_19') Get value from the TE_ExpensesManagement text group at index 19 (“Approved months:”)
curRepName	This variable includes the currently logged in user name. u8.session.identity.repName
processMetric_getOpenA032	This variable includes the number of records from the result of the query in data provider getOpenA032forProcessMetric. With $.getNumberOfRows() the records are counted and set to processMetric_getOpen variable.
phaseMetric_getRejectedA032	This variable includes the number of records from the result of the query in data provider getA032forProcessPhase3. With $.getNumberOfRows() the records are counted and set to phaseMetric_getRejectedA032 variable. Will be used in phase 3 in phase metric.
TXTprocess1	$t('TXT_TE_ExpensesManagement_8') Get value from the TE_ExpensesManagement text group at index 8 (“Receipts approved:”)
TXTprocess2	$t('TXT_TE_ExpensesManagement_6') Get value from the TE_ExpensesManagement text group at index 6 (“Open months:”)
TXTprocess3	$t('TXT_TE_ExpensesManagement_9') Get value from the TE_ExpensesManagement text group at index 9 (“Receipts submitted:”)
ParentRecord	The record Uid is set from the input message to the process storage. It is available in every step of the process.

Process Metrics

View	Description
Text	$.get("TXTprocess2")+" "+$.get("processMetric_getOpenA032")
Text	$.get("TXTprocess1")
Text	$.get("TXTprocess3")

Data Provider

Name	Description
Text	This data provider is using the UsingDataProvider action template and loads the TE_ExpensesManagement designer text group which includes all necessary texts for the process.
getOpenA032forProcessMetric	This data provider is using the ExecuteQueryDataProvider action template and executes the “select (RecCount) from (A032) where (F6000="$curRep" AND F6007<>"#9" AND F6007<>"#10" AND F6007<>"#7")” query statement. This query selects the number of records where the field user is the currently logged in user and approval status is not rejected, approved and submitted. It is used for the process metric on the right side of the process header to display all open months.
getA032forProcessPhase3	

Process Phases

- Expenses_Create

  The first phase is active and is displayed as active phase if the activePhase variable is “1”. The phase can be activated by clicking without a condition. Therefore, the condition is set to “true” which means that it can be activated anytime.

  The phase metric is composed of two values from the process storage. The text Rejected months: and the value of the count_openA032Phase1 variable from the process storage is displayed.

- Expenses_Edit

  The second phase is active and is displayed as active phase if the activePhase variable is “2”.

  The phase can be activated if a record in phase 1 is selected or if a user selects a record from the list on the start page.

  The phase metric is composed of two values from the process storage. The text Rejected months: and the value of the count_openA032Phase1 variable from the process storage is displayed.

- Expenses_Check

  The third phase is active and is displayed as active phase if the activePhase variable is “3”. The phase can be activated by clicking without a condition. Therefore, the condition is set to “true” which means that it can be activated anytime.

The phase metric is composed of two values from the process storage. The text Approved months: and the value of the phaseMetric_getRejectedA032 variable from the process storage is displayed.

Process steps

• TE_A032_Create_Initial

This is a $nop step. It is used to retrieve the number of all rejected months which is displayed in the phase metric in Phase 1. Therefore a separate data provider is defined. It executes a query which delivers all records which match the following condition: **select (RecCount) from (A032) where (F6000="$curRep" AND F6007="#9").**

You can select any field of the A032 info area because you only need the records to count them afterwards. **F6000** (User) is currently the logged in user and **F6007** (approval status) is rejected.

If a new data provider is defined it needs to be initialized before further operations is executed. Therefore a new variable (any name) with the new data provider as the source is set to **null**. In this case the **Init** variable is set to **null**.

The activePhase variable is used to handle which phase is shown as active phase. As the user can switch between the phases without any conditions, each phase defines this variable in it’s initial step. In this case it is set to 1 because the first phase should be displayed as the active phase. The count_openA032Phase1 variable includes the result of the data provider query action. With getNumberOfRows() all records is counted and summed up to this variable. It is pushed to the process storage in order to access it in every point of the process.

This step dispatches to the TE_A032_Calculation step in each case, because there is only one condition and it is set to true.

Action template: **$nop**

- Data Provider

Name	Action
getOpenA032forPhaseMetric	ExecuteQueryDataProvider

- Input arguments:

Name	Value	Source
Init	null	getOpenA032forPhaseMetric

- Output arguments:

Name	Value	Target
activePhase	1	Process Storage
count_openA032Phas e1	step.get("getOpenA032for-PhaseMetric.$").getN um-berOfRows()	Process Storage

- Dispatching:

Next step	Condition	Arguments
TE_A032_Calculation	true	none

• TE_A032_Create

This step is the main search in phase 1 to display all created or rejected months. If the user double- clicks in the list then the process dispatches to phase 2 and show all related B2 records (days). In the “TE_M_ExpensesManagement” context menu there is the “TE_A_A032_OpenRecord” action which executes a command which is used to dispatch to the next step where an A032 record is displayed in detail view.

The curA032 variable is pushed to the process storage, it includes the uid or the selected record in A032 search in Phase 1. This variable is used in several further steps and scripts.

Action template: **Search**

- Input arguments:

Name	Value	Source
fixedFilterName	A032.TE_A032_Expenses_Phase1	constant value
searchAndListName	A032	constant value
showSearch	false	constant value
selectionMode	single	constant value
listParams	showContextMenu,TE_M_Expenses-Management	constant value
autoSearch	true	constant value

- Output arguments:

Name	Value	Target
curA032	uid	Process Storage

- Dispatching:

Next step	Condition	Arguments
TE_A032_Edit_Initial	$.get('command')=='Select'	none
TE_A032_ExpandA032	$.get('command')=='Proceed.OpenA032'	uid = $.get('uid')

• TE_A032_Initial

This step handles the dispatching if a new parent record was selected or clicked on the management start page. In this case the curA032 variable is not set by selecting a record in phase 1 but set with the uid from the record selected on the start page or in other words with the value from the ParentRecord variable.

ParentRecord is defined in the main process view as process storage variable and is set if a user starts the process from a record list (e.g. start page). It is necessary to set this variable to null after copying it to the curA032 variable. This step dispatchs to the TE_a032_edit_Initial step in each case.

Action template: **$nop**

Output arguments:

Name	Value	Target
curA032	process.get("ParentRecord")	Process Storage
ParentRecord	null	Process Storage

Dispatching:

Next step	Condition	Arguments
TE_A032_Edit_Initial	true	none

• TE_A032_Edit_Initial

This is a $nop step. It is used to retrieve the number of all entered days which is displayed in the phase metric in phase 2. Therefore a separate data provider is defined. It executes a query action which delivers all records which match the following condition: select (Occupation2, Occupation3, Occupation4, Occupation5) from (B2) where (Occupation2 <> "" OR Occupation3 <> "" OR Occupation4 <> "" OR Occupation5 <> ""). Furthermore, the link / attribute link in this action has to be set. Only B2 records that are linked to selected A032 record in phase 1 have to be counted. So this attribute must be set to $.get("curA032"). The source is process storage.

If a new data provider is defined, it needs to be initialized before further operations is executed. Therefore a new variable (any name) with the new data provider as source is set to null. In this case the init variable is set to null.

The activePhase variable is used to handle which phase is shown as the active phase. As the user can switch between the phases without any conditions, each phase defines this variable in its initial step. In this case it is set to 2 because the second phase should be displayed as the active phase. The Count_B2forPhaseMetric variable includes the result of the data provider query action. With getNumberOfRows() all records are counted and summed up to this variable. It is pushed to the process storage in order to access it in every point of the process.

This step dispatchs to the TE_A032_Edit step in each case, because there is only one condition and it is set to true. No other conditions are necessary.

Action template: **$nop**

- Data Provider

Name	Action
getEnteredB2forPhaseMetric	ExecuteQueryDataProvider

- Input arguments:

Name	Value	Source
init	null	getEnteredB2forPhaseMet-ric

- Output arguments:

Name	Value	Target
activePhase	2	Process Storage
Count_B2forPhaseMetri c	step.get("getEnteredB2for-PhaseMetric.$").get Num-berOfRows()	Process Storage

- Dispatching:

Next step	Condition	Arguments
TE_A032_Edit	true	none

• TE_A032_Edit

This step is the main search in phase 2 to display all related B2 records for the selected A032 record

in phase 1.

To show only B2 records linked to this one A032 record the attribute link is set and filled with the uid from the curA032 variable from process storage. “MaxRows” is set to 31 because a month cannot include more than 31 days. “Mini Details” and “QuickView” is disabled.

The curB2 variable is pushed to the process storage, it includes the uid of the selected record in the B2 search in phase 2. This variable is used in some further steps.

Action template: Search

- Input arguments:

Name	Value	Source
searchAndListName	B2	constant value
createNewTab	false	constant value
DisableFilter	true	constant value
link	$.get('curA032')	Process Storage
showSearch	false	constant value
listParams	showMiniDetails,false;showQuickViewAction,false;	constant value
autoSearch	true	constant value
maxRows	31	constant value
link	$.get('curA032')	Process Storage
createnewPopup	false	constant value

- Output arguments:

Name	Value	Target
curB2	uid	Process Storage

- Dispatching:

Next step	Condition	Arguments
TE_A032_Edit_Expand_B2	$.get('command')=='Select'	none

- TE_A032_Edit_Expand_B2

Action template: **Expand**

- Input arguments:

Name	Value	Source
expandName	B2	C.V.
uid	$.get('curB2')	Process Storage

- Dispatching:

Next step	Condition	Arguments
TE_A032_Edit_Initial	$.get('command')=='Select'	none
TE_A032_Edit_New_B4	$.get('command')=='Select'	none
TE_A032_Edit_Expand_B4	$.get('command')=='Select'	uid = $.get("uid")
TE_A032_Edit_Expand_B4	$.get('command')=='Select'	uid = $.get("uid")
TE_A032_Edit_Initial	$.get('command')=='Select'	none

- TE_A032_Edit_New_B4

Action template: **ExpandNew**

- Input arguments:

Name	Value	Source
expandName	TE_B4_ExpensesManange-ment	constant value
info areaId	B4	constant value
link	$.get('curB2')	Process Storage
onProceed	$back	constant value

- Dispatching:

Next step	Condition	Arguments
TE_A032_Edit_Ex-pand_B2	$.get("com-mand")=="Save"	uid = $.get('curB2')

• TE_A032_Edit_Expand_B4

DESCRIPTION

Action template: **Expand**

- Input arguments:

Name	Value	Source
expandName	TE_B4_ExpensesManange-ment	constant value
uid	as is	Input Message

- Dispatching:

Next step	Condition	Arguments
TE_A032_Edit_Ex-pand_B2	$.get('command')=='Pro-ceed.Back'	uid = $.get("curB2")
TE_A032_Edit_Ex-pand_B2	$.get('command')=='Save'	uid = $.get("curB2")
TE_A032_Edit_Ex-pand_B2	$.get('command')=='Can-cel'	uid = $.get("curB2")

• TE_A032_Check_Initial

This is a $nop step. It is used to retrieve the number of all approved months which is displayed in the phase metric in phase 3. Therefore a separate data provider is defined. It executes a query which delivers all records which match the following condition: select (UpdUserName, F6007) from (A032) where ((F6007="#7" OR F6007="#10") AND F6000="$curRep")

You can select any field of the A032 info area because you only need the records to count them afterwards. F6000 (user) is the currently logged in user and F6007 (approval status) is approved.

If a new data provider is defined, it needs to be initialized before further operatations are executed. Therefore a new variable (any name) with the new data provider as the source is set to null. In this case the variable init is set to null.

The activePhase variable is used to handle what phase is to be shown as active phase. As the user can switch between the phases without any conditions, each phase defines this variable in its initial step. In this case it is set to 3 because the third phase should be displayed as the active phase. The Count_A032forProcessPhase3 variable includes the result of the data provider query action. With getNumberOfRows() all records is counted and summed up in this variable. It is pushed to the process storage in order to access it in every point of the process.

This step dispatches to the TE_A032_Check step in each case, because there is only one condition and it is set to true.

Action template: **$nop**

- Data Provider

Name	Action
getA032forProcessPhase3	ExecuteQueryDataProvider

- Input arguments:

Name	Value	Source
init	null	getA032forProcessPhase3

- Output arguments:

Name	Value	Target
activePhase	3	Process Storage
Count_A032forProcessPhase 3	step.get("getA032forProcessPhase3.$").g etNumberOfRows()	Process Storage

- Dispatching:

Next step	Condition	Arguments
TE_A032_Check	true	none

• TE_A032_Check

This step is the main search in phase 3 to display all A032 records which meet the condition of the

A032.TE_A032_Expenses_Phase3 fixed filter.

Action template: Search

- Input arguments:

Name	Value	Source
fixedFilterName	A032.TE_A032_Expenses_Phase3	
searchAndListName	TE_A032_ExpensesManagement	constant value
disableFilter	true	constant value
showSearch	false	constant value
listParams	showContextMenu,TE_M_ExpensesManagement	constant value
autoSearch	true	constant value
Selection mode	single	constant value
createnewPopup	false	constant value

- Dispatching:

Next step	Condition	Arguments
TE_A032_ExpandA032_readonly	$.get('command')=='Select'	uid = $.get('uid')
TE_A032_ExpandA032_readonly	$.get('command')=='Proceed.OpenA032'	uid = $.get('uid')

- TE_A032_ExpandA032_readonly

Action template: **Expand**

- Input arguments:

Name	Value	Source
expandName	TE_A032_ExpensesMan-agement_readonly	constant value
uid	as is	Input Message
createNewTab	false	constant value
createNewPopup	false	constant value
viewMode	Read	constant value

- Dispatching:

Next step	Condition	Arguments
TE_A032_Check_Initial	$.get('command')=='Pro-ceed.Back'	
TE_A032_Check_Initial	$.get('command')=='Save'	

- TE_A032_ExpandA032

Action template: **Expand**

- Input arguments:

Name	Value	Source
expandName	TE_A032_ExpensesMan-agement	constant value
uid	as is	Input Message
createNewTab	false	constant value
createNewPopup	false	constant value
viewMode	Edit	constant value

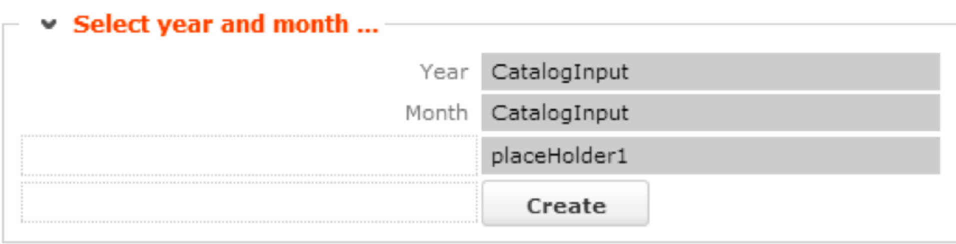
- Dispatching:

Next step	Condition	Arguments
TE_A032_Create_Initial	$.get('command')=='Pro-ceed.Back'	
TE_A032_Create_Initial	$.get('command')=='Save'	
TE_A032_Create_Initial	$.get('command')=='Can-cel'	

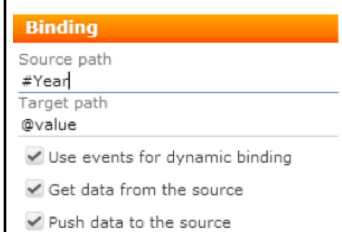
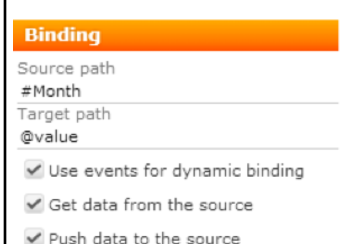
Forms

• TE_A032_Expenses_SelectYearAndMonth

This form is used in phase 1 to add new months. The user has to select the year and the month and click “Create”. The CORE_A023_Generate_B2_for_Month workflow is then executed. The form is shown in a popup which is automatically closed after clicking the “Create” button.



Elements:

Type	Description
GroupPanel	This group panel includes all further form elements. The group panel title is defined by {TXT_TE_ExpensesManagement_1} = “Select year and month ... “
TablePanel	2 columns, 4 rows
Label	The label text is defined by {TXT_net_core_texts_106} = “Year”
Label	The label text is defined by {TXT_net_core_texts_124} = “Month”
CatalogInput	Uses the field 6005 from the A032 work-flow.(year catalog) To use the selected value (year) by clicking the “Create” but-ton, the attribute value is defined with #Year. 
CatalogInput	Uses the field 6022 from the A032 info area.(month catalog) To use the selected value (month) by clicking the “Create” button, the attribute value is defined with #Month. 
Button	This button is used to call the workflow which creates the A032 and related B2 records. The button text is {TXT_proces-sask_text_5} = “Create”.

"onClick Event" is defined as follows:

```
var form = u8.Base.Widgets.Form.getForm(sender);
var url = sender.page.url;

u8.services.actions.execute("CORE_A_B2_Workflow_CreateMonth",
{
    arguments: {
        name: "CORE_A023_Generate_B2_for_Month",
        parameters: [
            {
                name: "year",
                values: [u8.services.catalogs.codeToText(6012, form.context.get("Year"))]
            },
            {
                name: "month",
                values: [form.context.get("Month")] }
        ]
    }
});

$w("popupWorkFrame").page.popup.close();
```

This function executes a context menu action which calls the CORE_A023_Generate_B2_for_Month workflow. Predefined values #Month and #Year are used as input arguments for the workflow.

Triggers

• TE_A032_UPD_RejectExpenses

<u>Info area:</u> A032 ; <u>Action:</u> Edit/update

This trigger set the approval status to **rejected**. It is used at the management startpage and is a available for superior users.

Will be called in button **TE_A032_RejectMonth**.

Used to set a submitted month to rejected by superior after checking all related data. (B2 and B4

records)

• TE_A032_UPD_ReleaseExpenses

<u>Info area</u>: A032 ; <u>Action</u>: Edit/update

This trigger sets the approval status to approved. It is used on the management start page and is available for superior users.

Will be called in the TE_A032_ApproveMonth button.

Used to set a submitted month to approved by the superior after checking all the related data. (B2 and B4 records)

• TE_A032_SetStatusToSubmitted

Info area: A032 ; Action: Edit/update

This trigger sets the approval status to submitted. It is used in the checkSubmitPermission javascript function after clicking on the “Submit” button in phase 2.

Will be called in the checkSubmitPermission javascript function.

Used to set a month to submitted by any user after creating all data within this month. (B2 and B4 records)

• TE_B2_DeleteAllLinkedRecords

Info area: B2 ; Action: Edit/update

Deletes the selected A032 record and all linked B2 records.

Will be called in the TE_SR_Template Main – LSI rights in the A032 info area at Delete (properties: transfers the settings from the child rights).

Used to delete all related B2 records if a user wants to delete a A032 record (month). There could be some problems if the user wants to create a month which was added but which was deleted afterwards.

• TE_A032_UPD_SetExpensesApprovalStatus

Info area: A032 ; Action: Edit/update

Copies the field values from the “Approval status” field to the “Approval status” (TE) field. The second field is used in some business logic structures.

Will be called in the TE_SR_Template Main – LSI rights in the A032 info area at New and Update.

• TE_B2_PLAUSI_Expenses Occupation 1

Info area: B2 ; Action: Edit/update

Copies the field content from the “Occupation 1⁄4” field to the “Occupation 2/4”, “Occupation 3⁄4” and “Occupation 4/4” fields if the “Occupation 1⁄4” field is updated.

Will be called in the TE_SR_Template Main – LSI rights in the B2 info area at New and Update fields (Occupation 1/4).

Used if a user sets the “Occupation” field to fill all other successive Occupation fields with the same value.

• TE_B2_PLAUSI_Expenses Occupation 2

Info area: B2 ; Action: Edit/update

Copies the field content from the “Occupation 2/4” field to the “Occupation 3⁄4” and “Occupation 4/4” fields if the “Occupation 2/4” field is updated.

Will be called in the TE_SR_Template Main – LSI rights in the B2 info area at New and Update fields (Occupation 2/4).

Used if a user sets the “Occupation” field to fill all other successive “Occupation” fields with the same value.

• TE_B2_PLAUSI_Expenses Occupation 3

Info area: B2 ; Action: Edit/update

Copies the field content from the “Occupation 3⁄4” field to the “Occupation 4/4” field if the “Occupation 3⁄4” field is updated.

Will be called in the TE_SR_Template Main – LSI rights in the B2 info area at New and Update fields (Occupation 3/4).

Used if a user sets the “Occupation” field to fill all other successive “Occupation” fields with the same value.

• TE_B2_PLAUSI_Expenses Overnight Stay

Info area: B2 ; Action: Edit/update

If the user sets the “Overnight stay” field to “Yes”, then the field content of “Arrival date” is copied to the “Departure date” field. The value “1” is added to the field. If the “Overnight stay” field is set to No, then the arrival date is copied to the departure date, the arrival time is copied to the departure time and the travel duration is set to 00:01.

Is called in the TE_SR_Template Main – LSI rights in the B2 info area at New, Update and Update fields (Overnight stay).

Used if a user sets the “Overnight stay” field to handle arrival and departure date / time.

• TE_B2_PLAUSI_Fill Mileage Charge

Info area: B2 ; Action: Edit/update

If the “Company car” field is set to “No”, the “Mileage Charge” field is set to null (empty). If the “Company car” field is set to “Yes”, then the “Mileage Charge” field is filled with content from the TE_Occupations.MileageCharge variable.

Will be called in the TE_SR_Template Main – LSI rights in the B2 info area at Update and Update fields (Mileage begin, Mileage end, Private mileage, Business mileage, Company cat, Private car)

• TE_B2_UPD_Expenses Overnight Stay

Info area: B2 ; Action: Edit/update

If the “Overnight stay” field is set to Yes or No, then the field content of the “Departure date” is copied to the “Arrival date” field. If the “Overnight stay” field is set to “Yes”, the “Arrival date” field is set to “1” and the “Arrival time” field is set to null (empty).

Is called in the TE_SR_Template Main – LSI rights in the B2 info area at Update.

• TE_B2_UPD_Fill Rates

Info area: B2 ; Action: Edit/update

The “Daily rate” field is set with the value from the TE_Occupations.DailyRate01 - TE_Occupations.DailyRate12 variable depending on the “Travel duration” field. The condition checks if travel duration >= variable TE_Occupations.ConditiondailyRate01 - TE_Occupations.ConditiondailyRate12.

Will be called in rights TE_SR_Template Main – LSI in info area B2 at New, Update and Update fields (Accommodation private, Travel duration, Reduction breakfast, Reduction lunch, Reduction dinner, No allowance calculation) with Condition (No allowance calculation = No)

• TE_B2_UPD_Calc Allowance

Info area: B2 ; Action: Edit/update

Content of field Daily rate is copied to field Daily allowance. Then values from fields Reduction breakfast (amount), Reduction lunch (amount) and Reduction dinner (amount) is subtracted from value of field Daily allowance.

Will be called in rights TE_SR_Template Main – LSI in info area B2 at Aurea CRM and Aurea CRM fields (Daily rate, Reduction breakfast, Reduction lunch, Reduction dinner, No allowance calculation) with Condition (No allowance calculation = No)

• TE_B2_UPD_Calc Allowance=0

Info area: B2 ; Action: Edit/update

Set value of field Daily allowance to null (empty) if Daily allowance < null (empty)

Will be called in the TE_SR_Template Main – LSI rights in the B2 info area at Aurea CRM and Aurea CRM fields (Daily allowance) with Condition (No allowance calculation = No)

• TE_B2_UPD_SetFixCat_ApprovalStatus

Info area: B2 ; Action: Edit/update

Sets the value of the “Approval status” field (TE fixed catalog) to the value of the “Approval status” field.

Will be called in the TE_SR_Template Main – LSI rights in the B2 info area at New, Update and Update fields (Approval status)

• TE_B4_UPD_SetApprovalStatusFromB2

Info area: B4 ; Action: Edit/update

Sets the “Approval status” field in B4 with the field content of the “Approval status” field from the B2 info area.

Will be called in the TE_SR_Template Main – LSI rights in the B2 info area at Update and Update fields (Approval status).

• TE_B2_UPD_SetValidate

Info area: B2 ; Action: Edit/update

Set the “TE:Validated” field to Y if in every field (Occupation 1/4 - Occupation 4/4) is a value entered and the “Workday” field is set to Yes. Set the “TE:Validated” field to N if every field (Occupation 1/4 - Occupation 4/4) is empty and the “Workday” field is set to Yes.

Will be called in the TE_SR_Template Main – LSI rights in the B2 info area at New, Update and Update fields (Occupation 1⁄4, Occupation 2/4, Occupation 3⁄4, Occupation 4/4, Workday).

• TE_B2_UPD_Update Occupation (TE)

<u>Info area</u>: B2 ; <u>Action</u>: Edit/update

For detailed information please have a look at the trigger in the win module.

Will be called in the TE_SR_Template Main – LSI rights in the B2 info area at New, Update and Update fields (Occupation 1⁄4, Occupation 2/4, Occupation 3⁄4, Occupation 4/4, Workday).

• CORE_Expenses_sum_B2_to_A032

<u>Info area</u>: A032 ; <u>Action</u>: Edit/update

The “Total receipts” field is filled with the sum of the “Total receipts” field of all linked B2 records.

The “Private Mileage” field is filled with the sum of the “Private Mileage” field of all linked B2 records.

The “Business Mileage” field is filled with the sum of the “Business Mileage” field of all linked B2 records.

The “Mileage allowance” field is filled with the sum of the “Mileage allowance” field of all linked B2 records.

The “Total Flat Rates” field is filled with the sum of the “Total Flat Rates” field of all linked B2 records.

Will be called in the TE_SR_Template Main – LSI rights in the B2 info area at New, Update and Update fields (Total receipts, total Flat Rates, Provate Mileage, Business Mileage, Mileage Allowance).

• TE_B4_DV_Receipt

<u>Info area</u>: B4 ; <u>Action</u>: Edit/update

The “Receipt date” field is filled with the value from the “Date” field from B2.

The “Approval status” field is filled with the value from the “Approval status” field from B2.

The “Cost center” field is filled with the value from the “Cost center” field from B2.

Will be called in the TE_SR_Template Main – LSI rights in the B4 info area at New.

• TE_B4_UPD_SetFixCat_ApprovalStatus

Info area: B4 ; Action: Edit/update

Set “TE:Occupation Approval status” field to “New” if Approval status = New

Set “TE:Occupation Approval status” field to “Submitted” if Approval status = Submitted Set “TE:Occupation Approval status” field to “Reviewed” if Approval status = Reviewed Set “TE:Occupation Approval status” to “Rejected” if Approval status = Rejected

Set “TE:Occupation Approval status” field to “Approved” if Approval status = Approved

Will be called in the TE_SR_Template Main – LSI rights in the B4 info area at New, Update and Update fields (Approval status).

• TE_B4_UPD_No Compensation

Info area: B4 ; Action: Edit/update

Set “Amount compensated” field to the value of the “Amount” field if No compensation = No. Set the “Amount compensated” field to null (empty) if No compensation = Yes.

Will be called in the TE_SR_Template Main – LSI rights in the B4 info area at New, Update and Update (No compensation, Amount).

• TE_B4_UPD_SetYearFromReceiptDate

Info area: B4 ; Action: Edit/update

Set the “Year” field to the value of the receipt date. The reference function is “Year”.

Will be called in the TE_SR_Template Main – LSI rights in the B4 info area at New, Update and Update fields (Receipt date).

• TE_A3_PLAUSI_WF_Fill Occupation=Call

Info area: A3 ; Action: Edit/update

Set the “Occupation” field to the Visit value.

Will be called in the TE_ Expenses - Fill Occupation workflow in Occupation=Call.

• TE_U059_UPD_Calculate_UsedUntilNow

Will be called in the TE_B4_CalculateQuotas workflow in the Find suitable contingent process.

• TE_U059_EMAIL_Send email to Superior

Will be called in the TE_B4_CalculateQuotas workflow in the Call Email Trigger process.

Workflows

• CORE_A023_Generate_B2_for_Month

Will be called in the CORE_A_B2_Workflow_CreateMonth menu action and in the

TE_A032_Expenses_SelectYearAndMonth form.

Processes:

o Month Mapping

o Input value is a A032 record

o Get year and month and see if the A032 dataset exists

o Get A032 amd set parameter

o Check month and call process “B2 create”

o Create B2 datasets

• TE_A032_CD_GenerateHolidayForB2

Will be called in the CORE_A032_Generate_B2_for_Month workflow in the Create B2 datasets process.

Processes:

o getInfo()

o Input value is an A032 record.

o Update B2 records

• TE_B4_CalculateQuotas

Will be called in the TE_SR_Template Main – LSI rights in the B4 info area at New, Update and Delete with Condition Year is not null (empty), Amount is not bull (empty) and Type is not null (empty).

Processes:

o Fill intern variables

o Search for B2 records depending on rep o Set B4 records

o Calculate amount

o Find suitable contingent

o Call E-mail trigger

• TE_Expenses - Update Records_v3

Will be called in button TE_A032_UpdateRecords.

Processes :

o Start

o Loop Occupations

Used to loop all Occupation records (B2 – days). Walk through each related B2 record and execute the TE_Expenses – Fill Occupation and TE_Expenses Receipt – Create Records workflows with currently selected B2 record Uid as the input parameter. This is part of the operation which is executed if a user clicks on the “Update” button in phase 2.

• TE_Expenses - Fill Occupation

Will be called in TE_Expenses - Update Records_v3 workflow in the Loop Occupations process.

Processes :

o Start

o Loop Other Appointments or Loop Calls

o Occupation=Call

Used to check if there are related Other appointments and Activity (calls) records. If yes, this workflow automatically fills the “Occupation 1⁄4” – “Occupation 4/4” fields for the respective day in a month. This is part of the operation which is executed if a user clicks on the “Update” button in phase 2.

• TE_Expenses Receipt - Create Records

Will be called in the TE_Expenses - Update Records_v3 workflow in the Loop Occupations process.

Processes :

o Loop Calls

o Loop Call Expenses o Create Receipt

Used to check if there are related Call Expenses records from the Call documentation process. If yes, this workflow automatically creates receipts for the respective day in a month. This is part of the operation which is executed if a user clicks on the “Update” button in phase 2.

Rights

• TE_SR Template Main – LSI (Station right)

Info Area	Deny Access	Deny New	Deny Update	Deny Deletion
A032		X	X	X
B2		X	X	X
B4		X	X	X

JavaScript

- checkSubmitPermission: function(o){}

  This function is used in phase 2 in the TE_B2_ExpensesManagement_Submit button.

  1. The function first reads the value of the curA032 variable from the process storage.
  2. Checks if the currently logged in user = user from A032 record, if not then disable button!

3. Checks if superior is entered, if not then create an MD record with the following text: “You cannot submit this month”.
4. Calls the trigger to submit a record! Trigger name: TE_A032_SetStatusToSubmitted
5. Dispatch to phase 3, step TE_A032_Check_Initial!

   This function is used in phase 2 if a user clicks the on the “Submit” button. Some checks need to be carried out before submitting a month if the user is allowed to submit the selected month.

- updateB2reocrds: function(o){}

  This function is used in phase 2 in the TE_A032_UpdateRecord button. The function first reads the value of the curA032 variable from the process storage. This record Uid is used as input parameter for the TE_Expenses – Update Records_v3 workflow.

  This function is used in phase 2 if a user clicks on the “Update” button.

- A032_calculateSummedReceipts: function () {}

  Basically this function handles the process metrics on the right side of the process header. There have to be 2 values which is calculated and set to the header. Amount of all added and approved receipts (so that the user knows how much is already approved by the superior).

  1. Amount of all added and submitted receipts (so that the user knows how much is already submitted but needs to be approved by the superior).

  Therefore the function uses two different AQL statements within separate queries.

  1. select (F6000, B2.TotalAmount) from (A032) where (F6000='$curRep' AND F6007 ='#10') withsummed (B2 using link 301) where (TotalAmount<>'0')

  2. select (F6000, B2.TotalAmount) from (A032) where (F6000='$curRep' AND F6007='#7') withsummed (B2 using link 301) where (TotalAmount<>'0')

  The function uses the following syntax to set calculated values to the process metric:

  var old_text = $w("work").page.process.metrics[2].getValue(); var new_text = old_text + " " + sumReceipts + " €"; $w("work").page.process.metrics[2].setValue(new_text);

  First the function needs to get the text of the metric which is entered by designer configuration. Then the new ‘complete’ text is assembled and set to the process metric with setValue.

Other

• Variables

o TE_Occupations.MileageCharge

Defines the mileage allowance for private cars.

o TE_Occupations.DailyRate01 - TE_Occupations.DailyRate12

Defines the daily rate for the corresponding time frame.

o TE_Occupations.ConditionDailyRate01 - TE_Occupations.ConditionDailyRate12

Defines a time frame in hours for the calculation of the daily allowance, a day can be split into 12 parts.

o TE_Occupations.AccommodationRate

Defines the private accommodation rate.

o TE_Occupations.ReductionBreakfast

Defines the breakfast reduction.

o TE_Occupations.ReductionDinner

Defines the lunch reduction.

o TE_Occupations.ReductionLunch

Defines the dinner reduction.

• Special Header

o TE_A032_ExpensesManagement

This special header is used in the process header on the right side. It includes the info area image and the text “Occupation Management”.

2

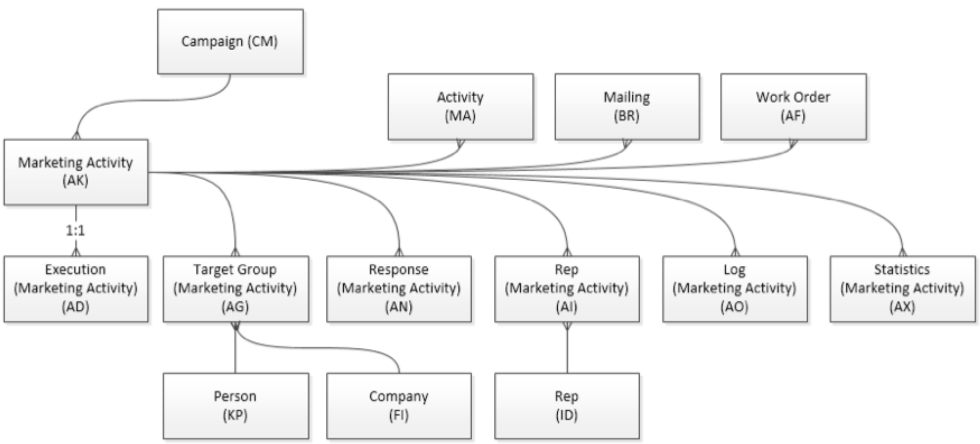
Marketing

Here you can learn about the various marketing and sales related activities.

Marketing activity combines the active campaign for products with the aim to drive sales. Below topics discusses in detail the various activities that relates to marketing:

Campaign Management (CRM #70000080)

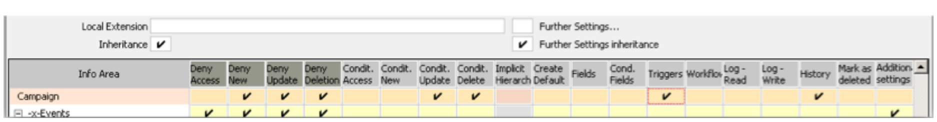
Learn about configurations for Campaign management.



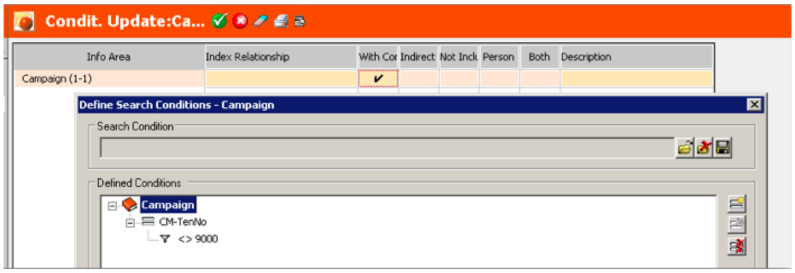
Rights & Triggers

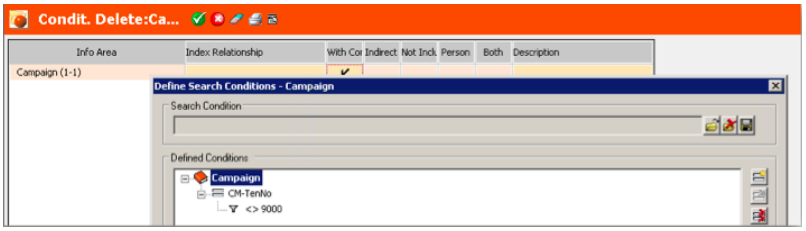
Rights for Info Area Campaign (CM)

In the main right the info area is defined as visible but it is not possible to add, update or delete records.



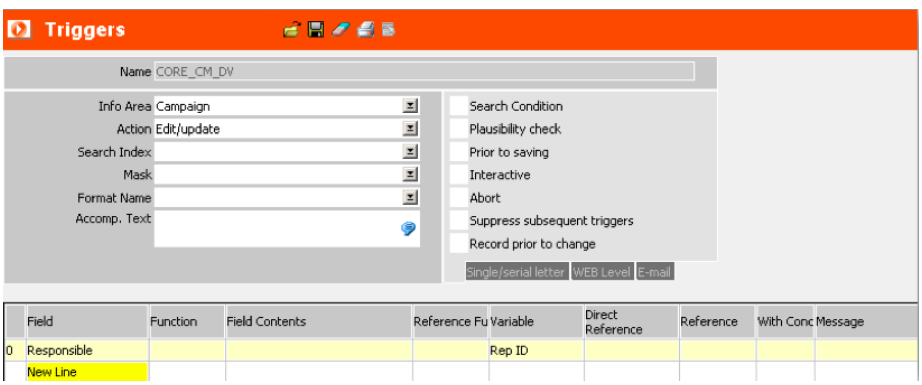
It is also defined that records with tenant 9000 are not allowed to be updated or deleted – as they are part of the template and should be “upgradeable”.



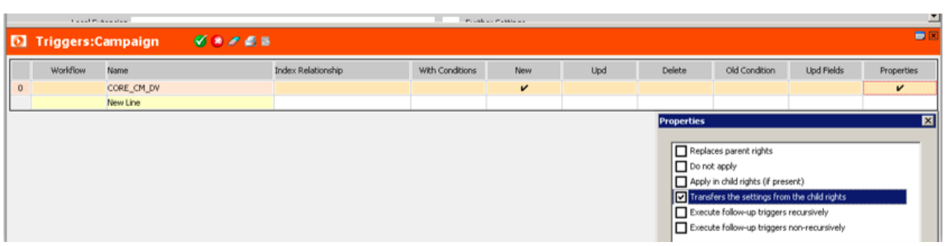


Trigger for Campaign (CM) Info Area CORE_CM_DV Trigger

This trigger is used to set the current rep as the responsible rep for the Campaign (CM) when the record is created. It is on purpose of the “Edit/update” type (not default values) – as otherwise it would not work when creating records from a template.

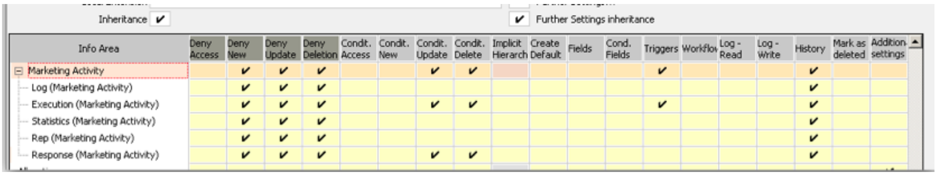


The trigger can be overwritten in a child right:

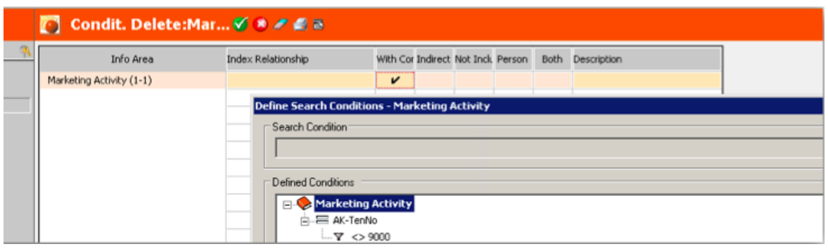


Rights for the Marketing Activity (AK) Info Area

In the main right the info area is defined as visible but no new, update or delete.



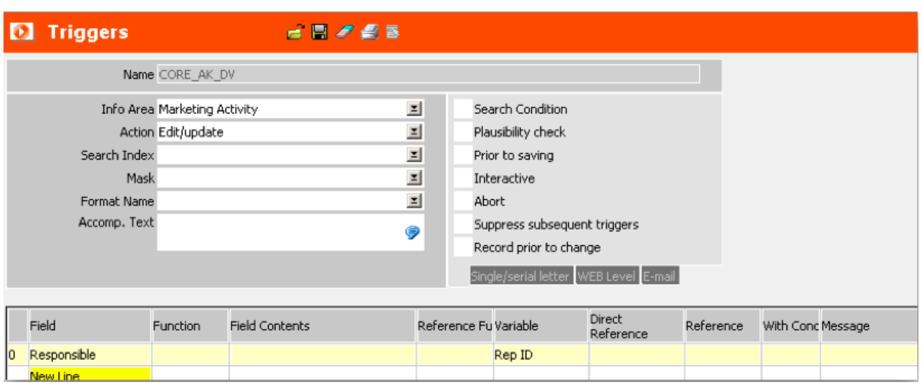
It’s also defined that records with tenant 9000 are not allowed to be updated or deleted – as they are part of the template and should be “upgradeable”.



Trigger for Info Marketing Activity (AK)

Trigger CORE_AK_DV

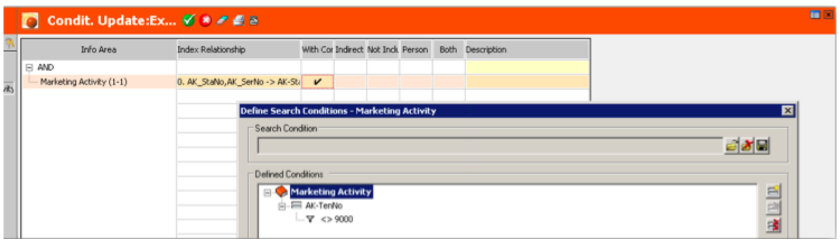
This trigger is used to set current rep as the responsible rep for the Marketing Activity (AK) when the record is created. It’s on purpose of type “Edit/update” (not Default Values) – as otherwise it would not work when creating records from a template.

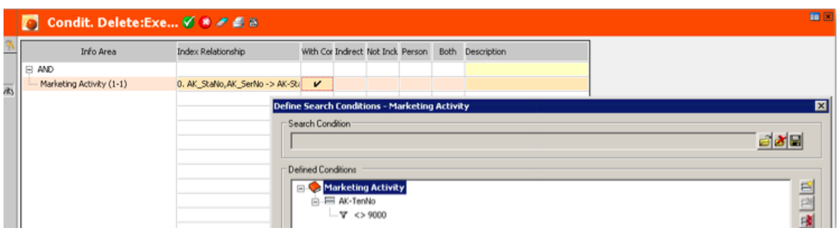


The trigger can be overwritten in a child right:

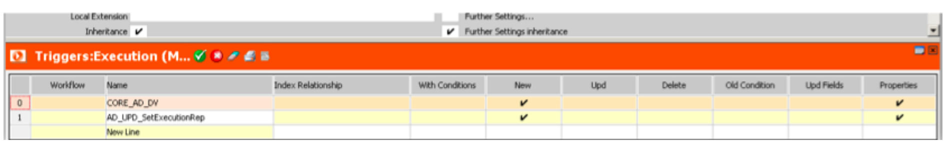
Rights for Info Area Execution (Marketing Activity) (AD)

It’s also defined that records that belong to marketing activities (AK) with tenant 9000 are not allowed to be updated or deleted – as they are part of the template and should be “upgradeable”.



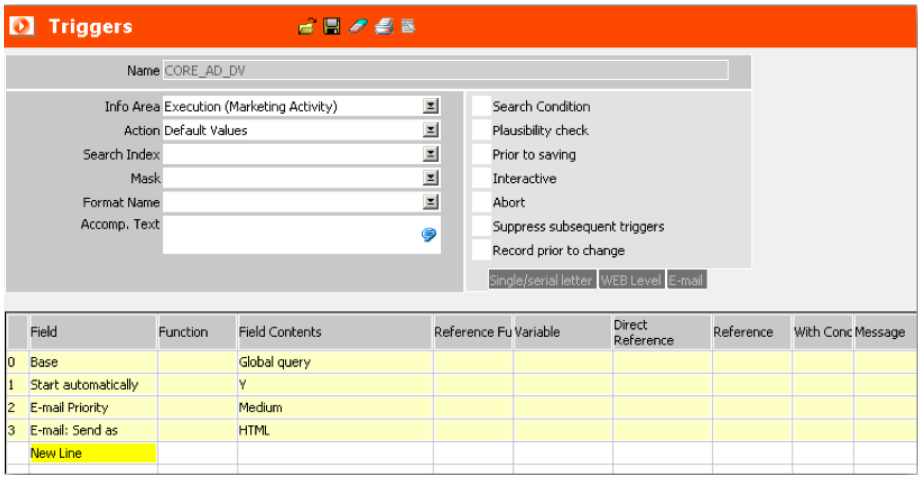


Trigger for Info Area Execution (Marketing Activity) (AD)

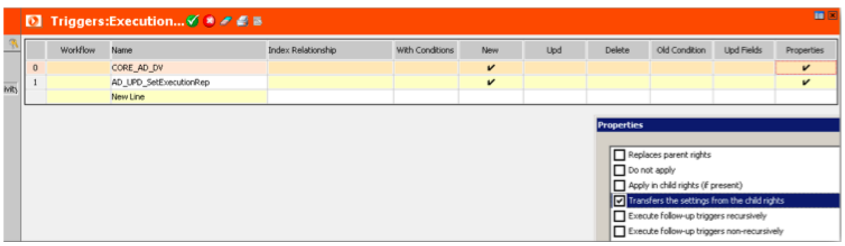


Trigger CORE_AD_DV

This trigger is used to set the default values when creating an Execution (Marketing Activity) (AD) that is NOT based on a template.



The trigger can be overwritten in a child right:

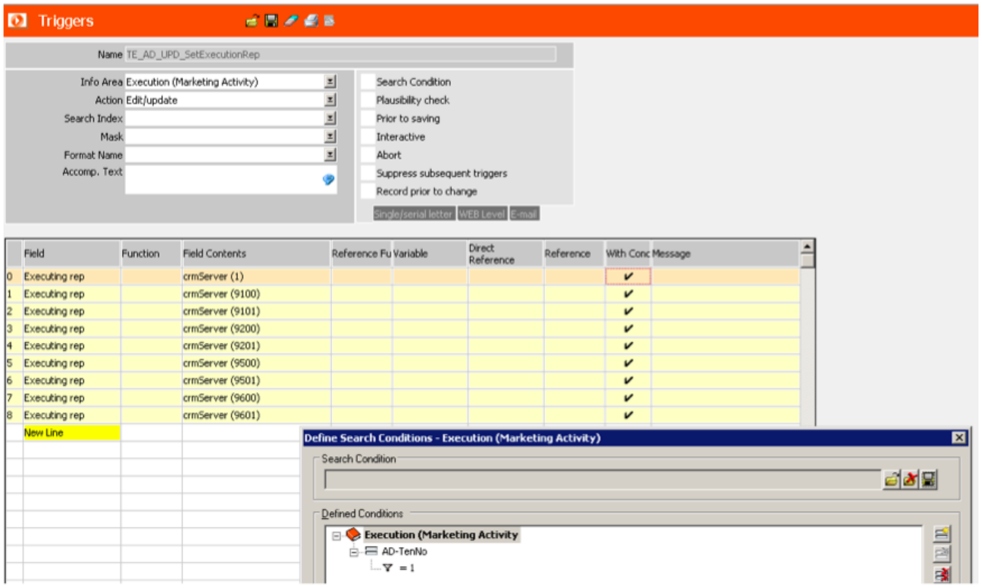


Trigger TE_AD_UPD_SetExecutionRep

This trigger is used to set the u7Server user of the current tenant for the record. It’s on purpose of type “Edit/update” (not Default Values) – as otherwise it would not work when creating records from a template.

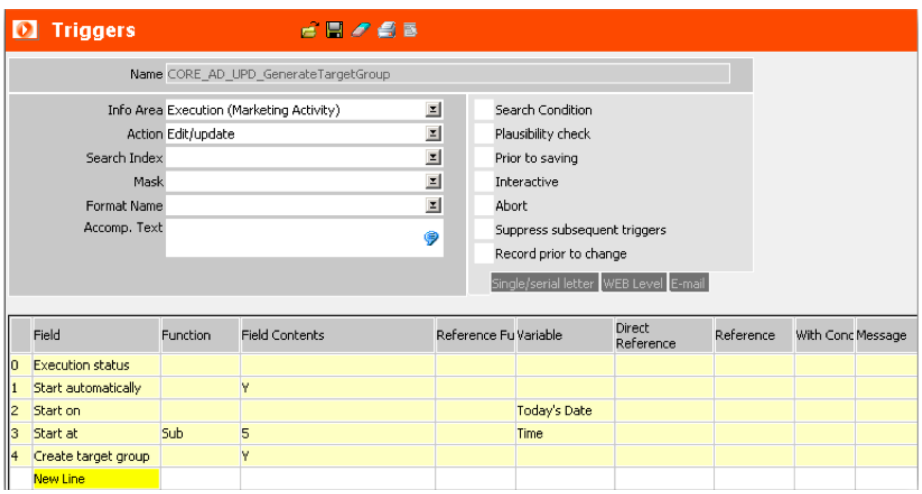
The u7Server creates (among other tasks) messages and they are produced in a specified language (this language is set in the registry entry for the u7Server with the flag “–l”).

To-do in a project: If a new tenant is created for an installation, this trigger has to be adapted:



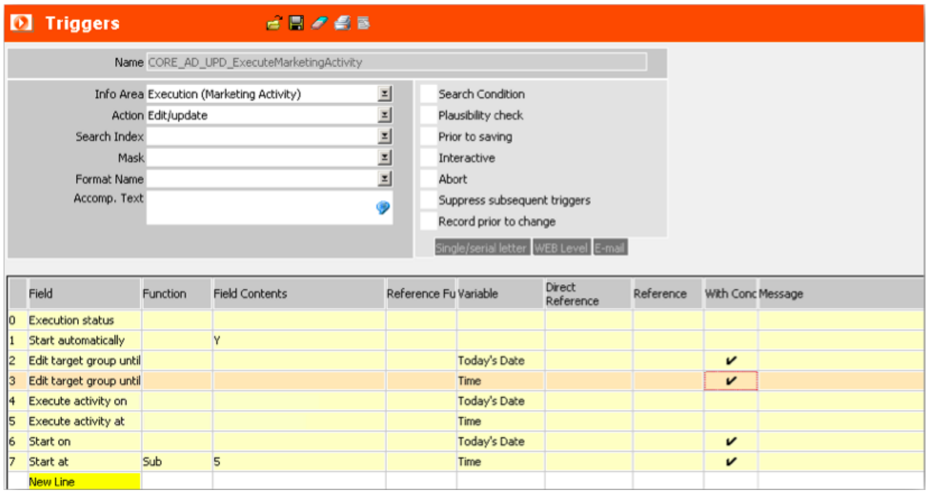
Trigger CORE_AD_UPD_GenerateTargetGroup

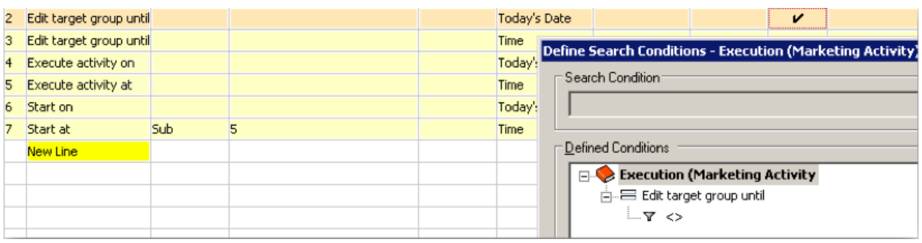
This trigger is used to create a target group. The trigger is called via the button "CORE_AD_CreateTargetGroup"(menuaction "CORE_A_AD_GenerateTargetGroup") and via the context menu of AD "CORE_A_AD_GenerateTargetGroup".

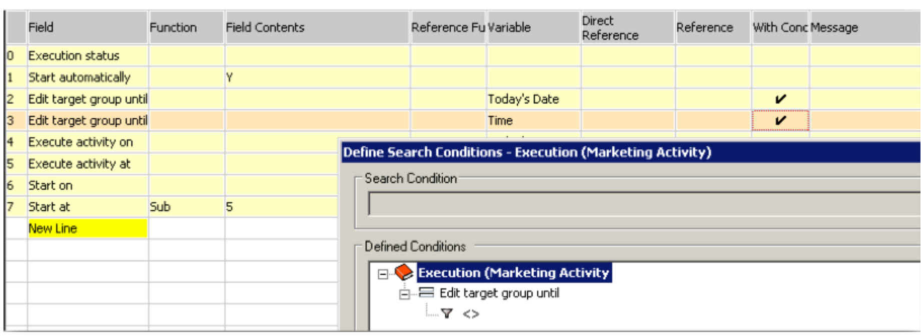


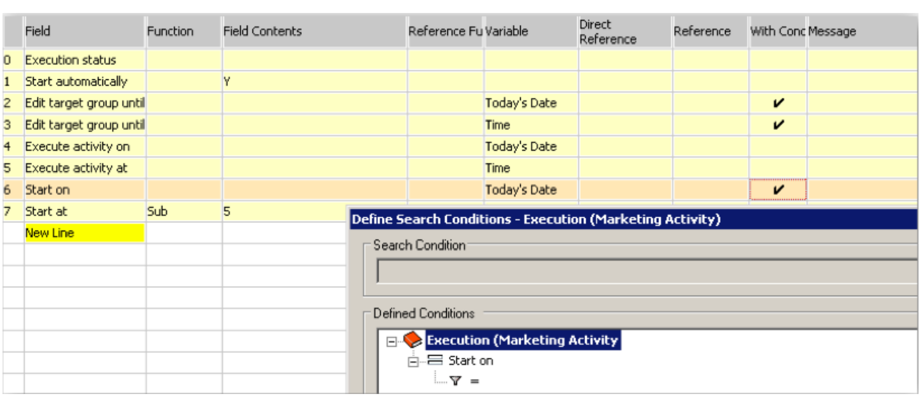
Trigger CORE_AD_UPD_ExecuteMarketingActivity

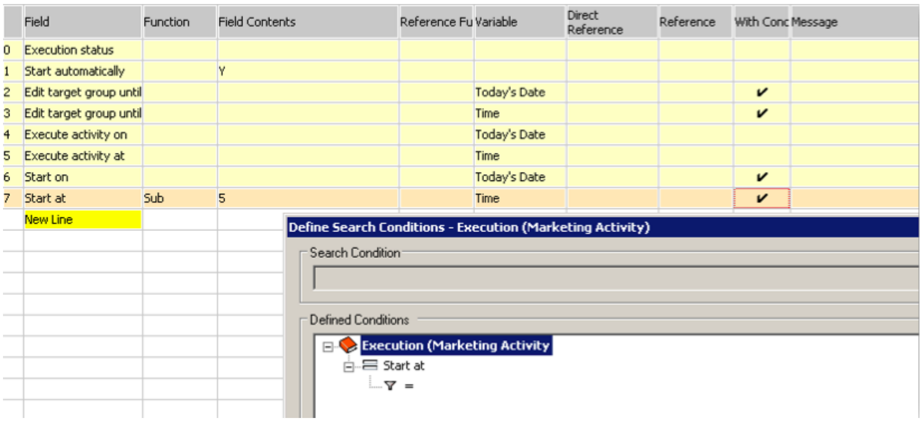
This trigger is used to start the Marketing Activity. It is called via the button "CORE_AD_StartMarktingActivity"(action "CORE_A_AD_ExecuteMarketingActivity") and via the context menu of AD "CORE_A_AD_ExecuteMarketingActivity". As it is not necessary to create a target group first in order to start a marketing activity, the trigger checks (With Condition) if a target group was created or not – and acts accordingly.


Triggers
Name CORE_AD_UPD_ExecuteMarketingActivity
Info Area Execution (Marketing Activity)
Action Edit/update
Search Index
Mask
Format Name
Accomp. Text
Search Condition
Plausibility check
Prior to saving
Interactive
Abort
Suppress subsequent triggers
Record prior to change
Single/serial letter
WEB Level
E-mail
Field
Function
Field Contents
Reference Fu
Variable
Direct Reference
Reference
With Conc
Message
0 Execution status
1 Start automatically Y
2 Edit target group until Today's Date
3 Edit target group until Time
4 Execute activity on Today's Date
5 Execute activity at Time
6 Start on Today's Date
7 Start at Sub 5 Time
New Line


2 Edit target group until Today's Date
3 Edit target group until Time
4 Execute activity on
5 Execute activity at Time
6 Start on
7 Start at Sub 5 Time
New Line
Define Search Conditions - Execution (Marketing Activity)
Search Condition
Defined Conditions
Execution (Marketing Activity
Edit target group until
<>

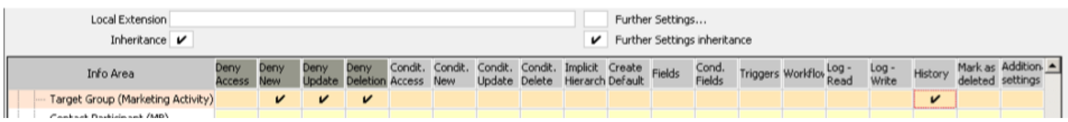

Field
Function
Field Contents
Reference Fu
Variable
Direct Reference
Reference
With Conc
Message
0 Execution status
1 Start automatically Y
2 Edit target group until Today's Date
3 Edit target group until Time
4 Execute activity on
5 Execute activity at
6 Start on
7 Start at Sub 5
New Line
Define Search Conditions - Execution (Marketing Activity)
Search Condition
Defined Conditions
Execution (Marketing Activity
Edit target group until
<>


Field
Function
Field Contents
Reference Fu
Variable
Direct Reference
Reference
With Conc
Message
0 Execution status
1 Start automatically Y
2 Edit target group until Today's Date
3 Edit target group until Time
4 Execute activity on Today's Date
5 Execute activity at Time
6 Start on Today's Date
7 Start at Sub 5
New Line
Define Search Conditions - Execution (Marketing Activity)
Search Condition
Defined Conditions
Execution (Marketing Activity
Start on
=



Rights for Info Target Group (Marketing Activity) (AG)

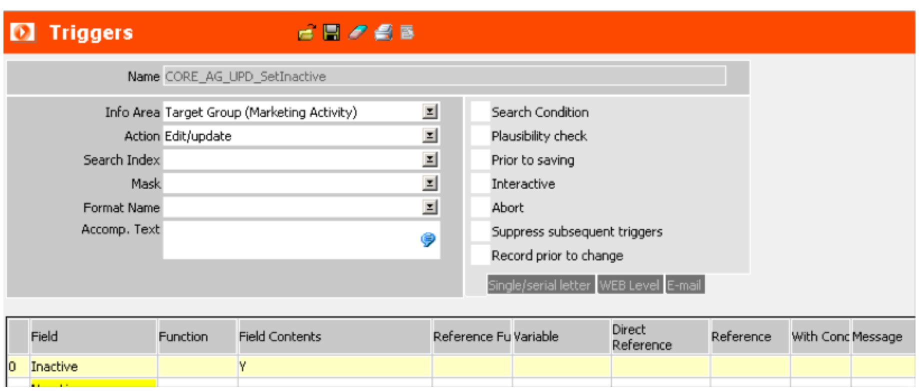
In the main right the info area is defined as visible but no new, update or delete.



Trigger for Info Target Group (Marketing Activity) (AG)

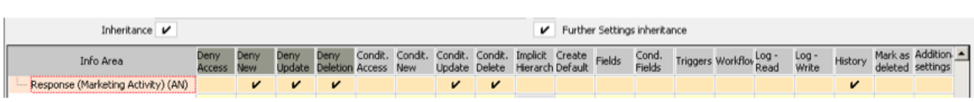
Trigger CORE_AG_UPD_SetInactive

This trigger is used to set the flag “Inactive” in an AG record. Thus the user does not have to touch each single record and set the flag, but select several records and uses the button. The trigger is called via the button “CORE_AG_SetInactive”.

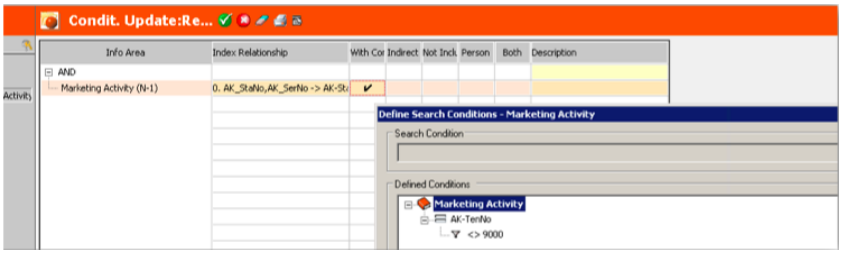


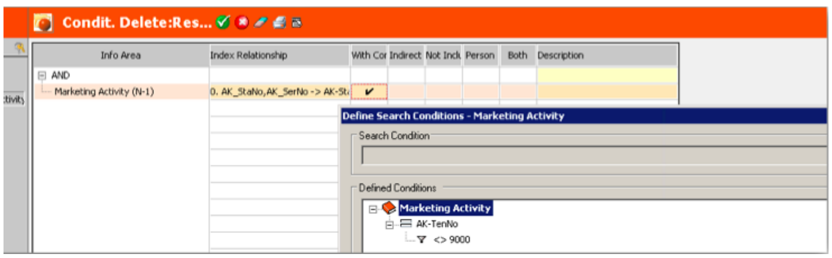
Rights for Info Area Response (Marketing Activity) (AN)

In the main right the info area is defined as visible but no new, update or delete.



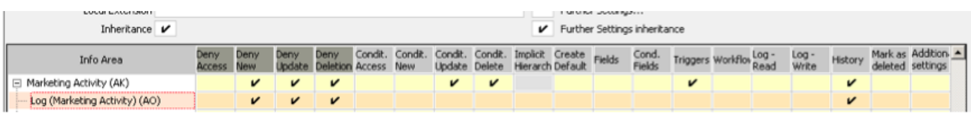
It’s also defined that records that belong to marketing activities (AK) with tenant 9000 are not allowed to be updated or deleted – as they are part of the template and should be “upgradeable”.





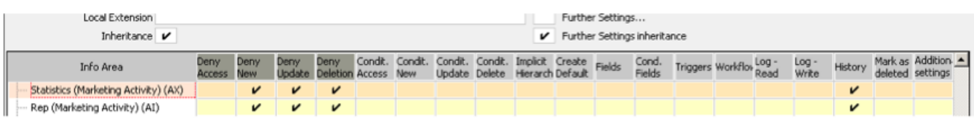
Rights for Info Area Response (Marketing Activity) (AO)

In the main right the info area is defined as visible but no new, update or delete.



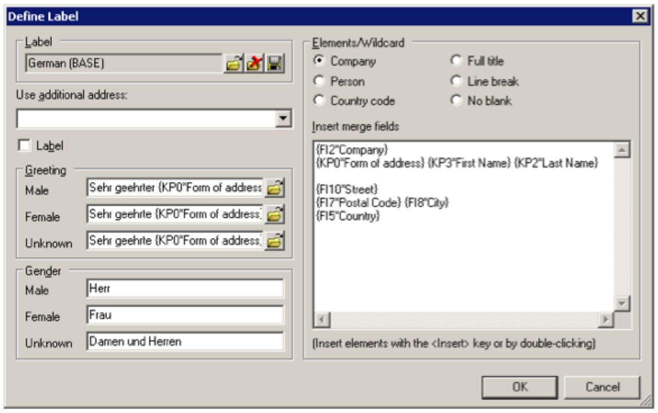
Rights for Info Area Statistics (Marketing Activity) (AX) and Rep (Marketing Activity) (AI)

In the main right the info area is defined as visible but no new, update or delete.

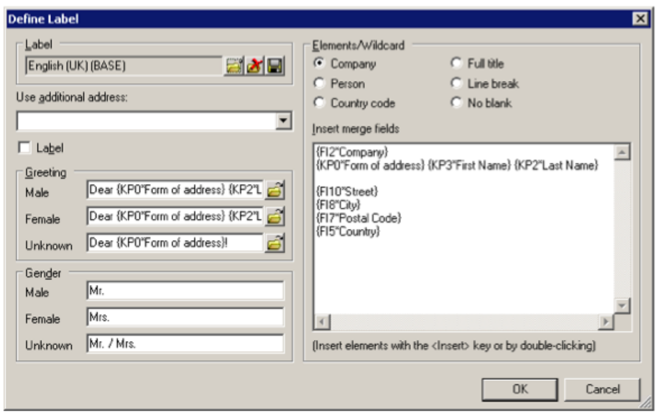


Label Formats

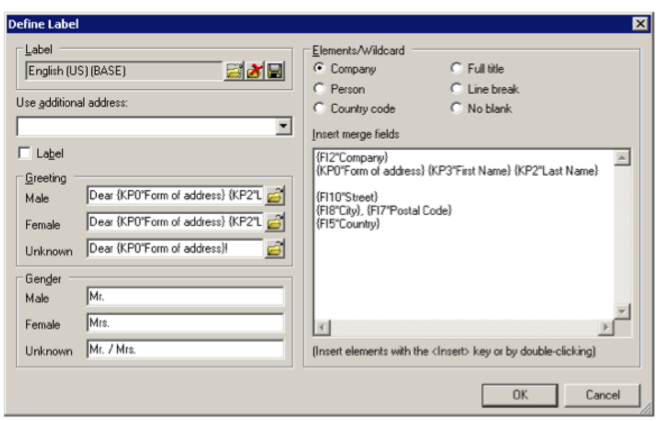
German (Base)



English (UK) (BASE)



English (US) (BASE)



Those labels are used based on the label value in the FI or KP record and therefore forms the content of the pre-defined documents CORE_German_Invitation.doc and CORE_English_Invitation.doc.


update

update software AG | Operngasse 17-21 | A-1040 Wien

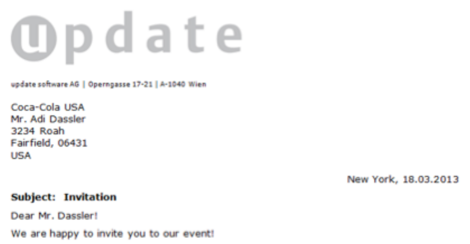
«Addr0»
«Addr1»
«Addr2»
«Addr3»
«Addr4»
«Addr5»
«Addr6»
«Addr7»

New York, 18.03.2013

Subject: Invitation

«Salutation»

We are happy to invite you to our event!


update

update software AG | Operngasse 17-21 | A-1040 Wien

Coca-Cola USA
Mr. Adi Dassler
3234 Roah
Fairfield, 06431
USA

New York, 18.03.2013

Subject: Invitation

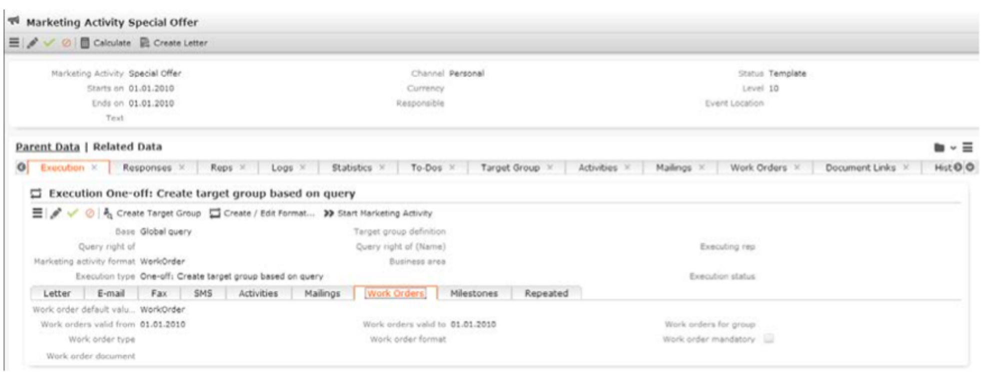
Dear Mr. Dassler!

We are happy to invite you to our event!

Marketing Activity Templates

The following activity template are defined:

"Special Offer" / "Aktion" (StNo: 10002 INo: 1025)



This template is used to create work orders (AF records) without any campaign – e.g. for special offers. If the special offer (AT) is linked to the marketing activity record and a AF record for the visited person exists, the products defined in the special offer are displayed e.g. in the sample dialog when clicking the button "Special Offer" in the serial entry.

Campaign Templates

The following campaign templates are defined:

Template: Product Promotion (StNo: 10000 INo: 5)

- Marketing Activity & Execution “Product Information”
- Marketing Activity & Execution “Follow-Up”
- Marketing Activity & Execution “Consultation”

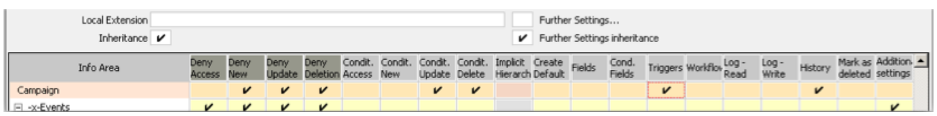
Vorlage: Produktpromotion (StNo: 10000 INo: 11)

- Marketing Activity & Execution “Produktinformation”
- Marketing Activity & Execution “Nachverfolgung”
- Marketing Activity & Execution “Beratung”

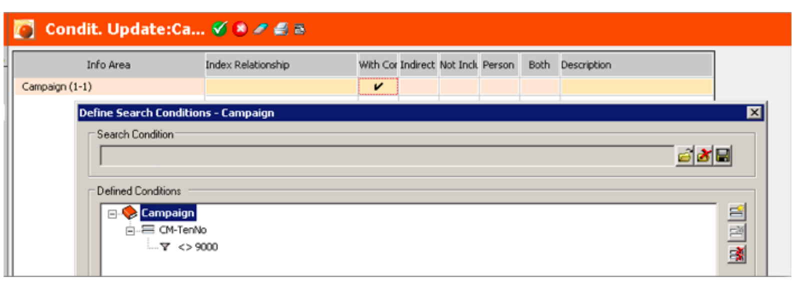
Rights & Triggers

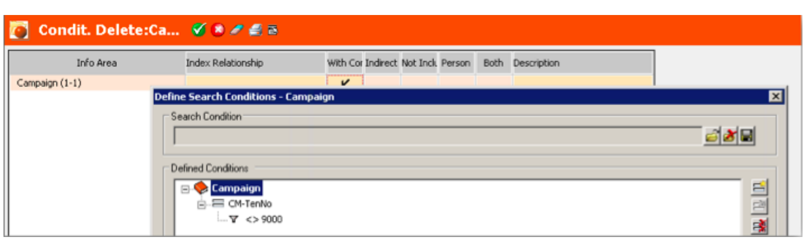
Rights for Info Area Campaign (CM)

In the main right the info area is defined as visible but it is not possible to add, update or delete records.



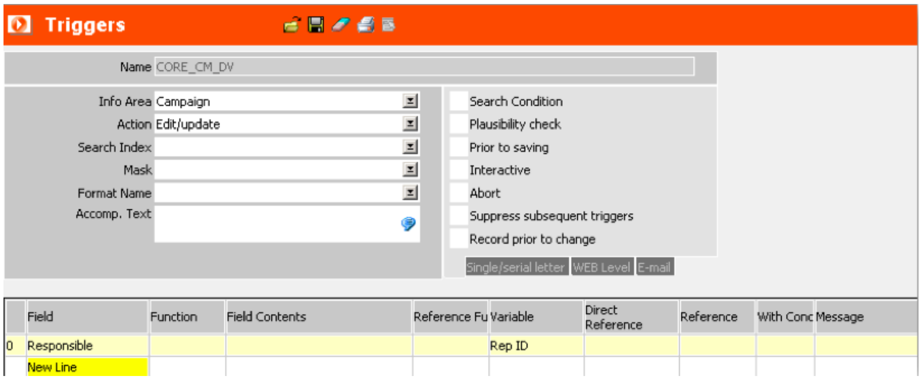
It is also defined that records with tenant 9000 are not allowed to be updated or deleted – as they are part of the template and should be “upgradeable”.



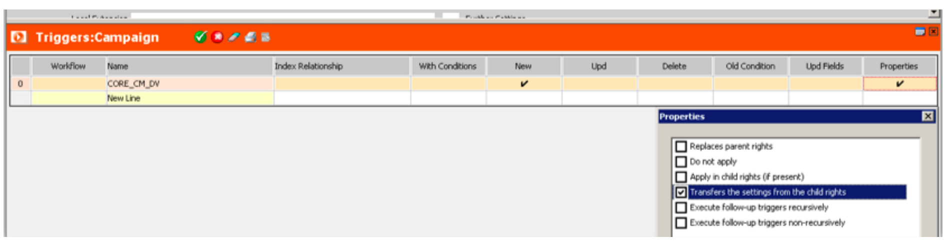


Trigger for Campaign (CM) Info Area CORE_CM_DV Trigger

This trigger is used to set the current rep as the responsible rep for the Campaign (CM) when the record is created. It is on purpose of the “Edit/update” type (not default values) – as otherwise it would not work when creating records from a template.

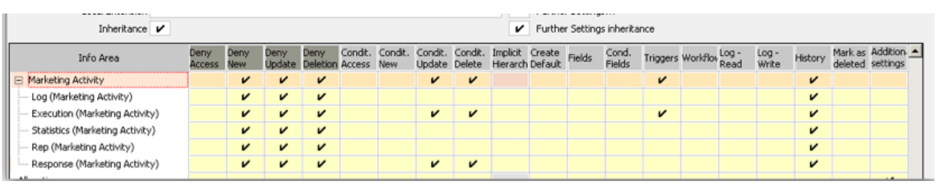


The trigger can be overwritten in a child right:

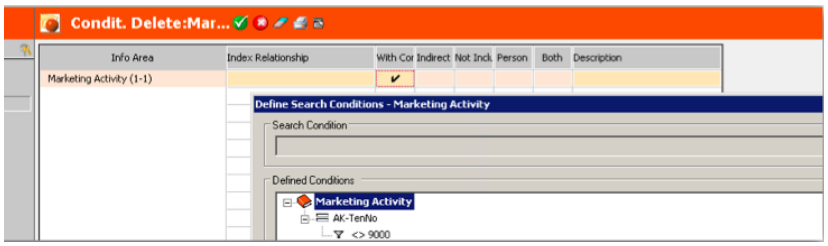


Rights for the Marketing Activity (AK) Info Area

In the main right the info area is defined as visible but no new, update or delete.



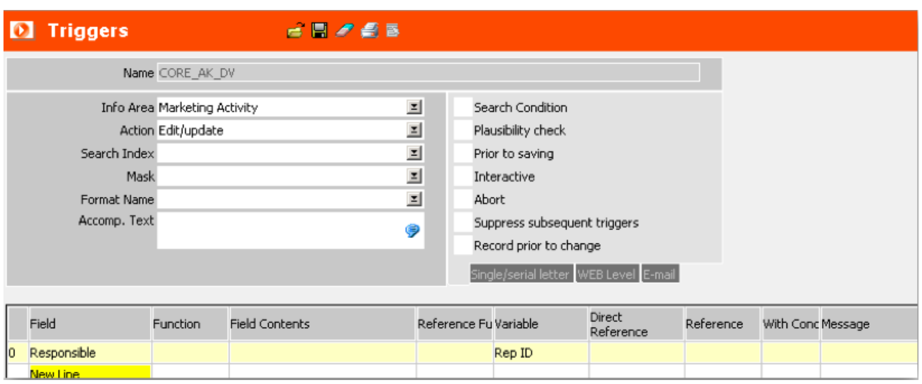
It’s also defined that records with tenant 9000 are not allowed to be updated or deleted – as they are part of the template and should be “upgradeable”.



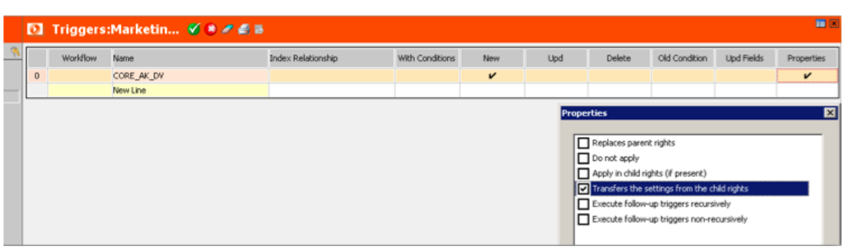
Trigger for Info Marketing Activity (AK)

Trigger CORE_AK_DV

This trigger is used to set current rep as the responsible rep for the Marketing Activity (AK) when the record is created. It's on purpose of type "Edit/update" (not Default Values) – as otherwise it would not work when creating records from a template.

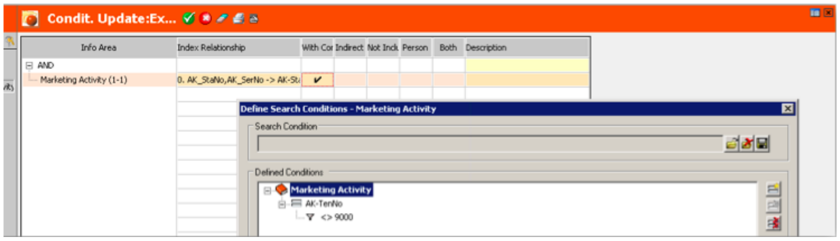


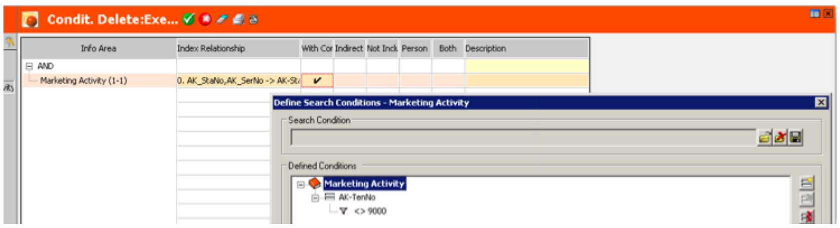
The trigger can be overwritten in a child right:



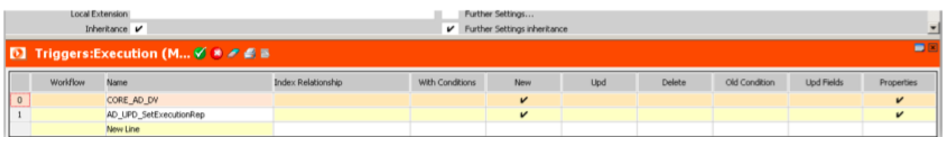
Rights for Info Area Execution (Marketing Activity) (AD)

It's also defined that records that belong to marketing activities (AK) with tenant 9000 are not allowed to be updated or deleted – as they are part of the template and should be "upgradeable".



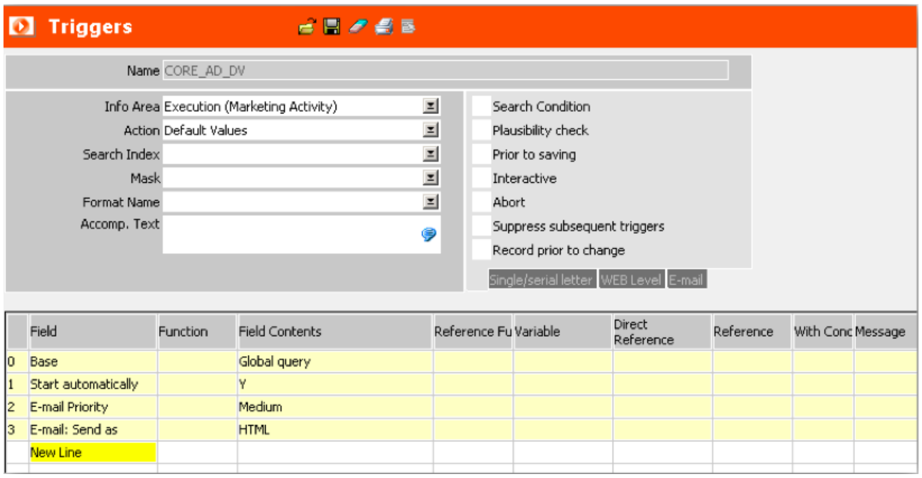


Trigger for Info Area Execution (Marketing Activity) (AD)

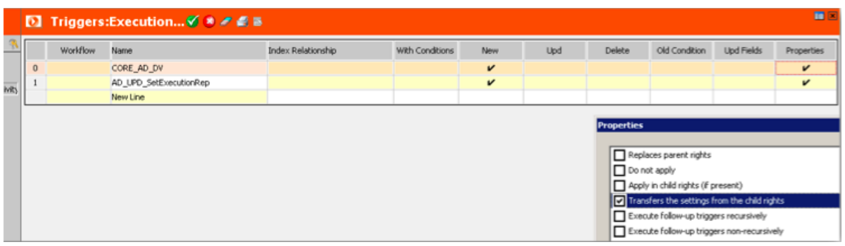


Trigger CORE_AD_DV

This trigger is used to set the default values when creating an Execution (Marketing Activity) (AD) that is NOT based on a template.



The trigger can be overwritten in a child right:

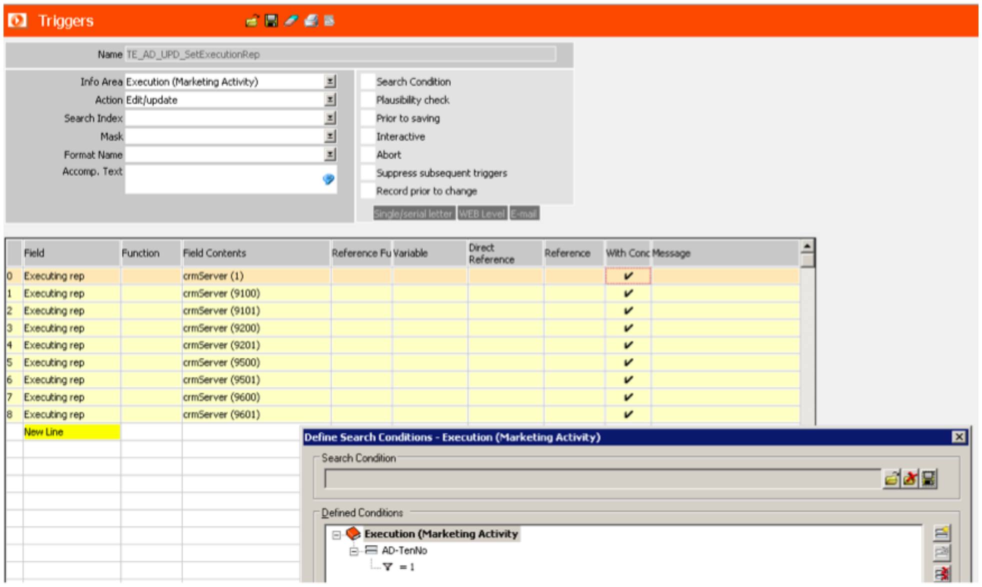


Trigger TE_AD_UPD_SetExecutionRep

This trigger is used to set the u7Server user of the current tenant for the record. It's on purpose of type "Edit/update" (not Default Values) – as otherwise it would not work when creating records from a template.

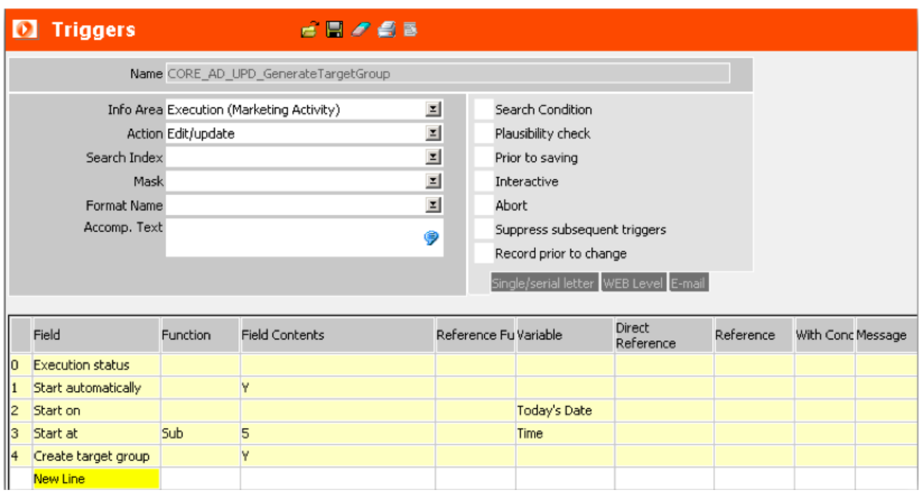
The u7Server creates (among other tasks) messages and they are produced in a specified language (this language is set in the registry entry for the u7Server with the flag "–l").

To-do in a project: If a new tenant is created for an installation, this trigger has to be adapted:



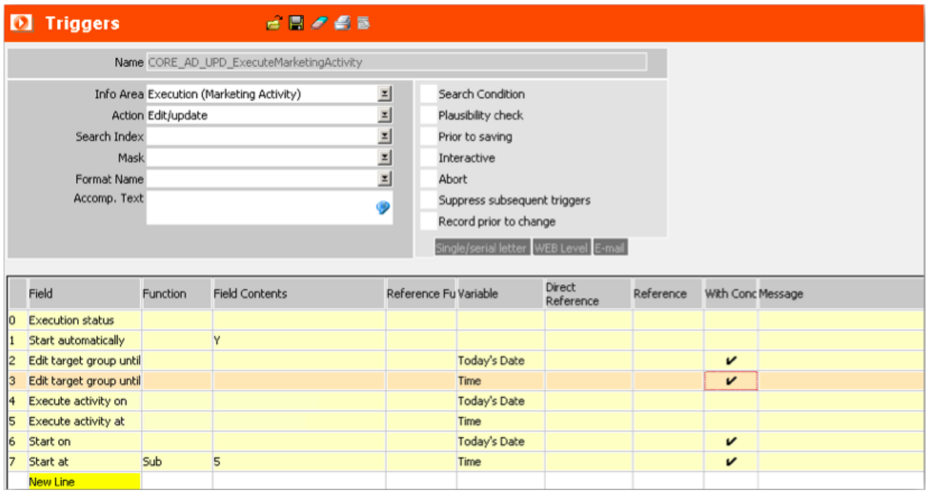
Trigger CORE_AD_UPD_GenerateTargetGroup

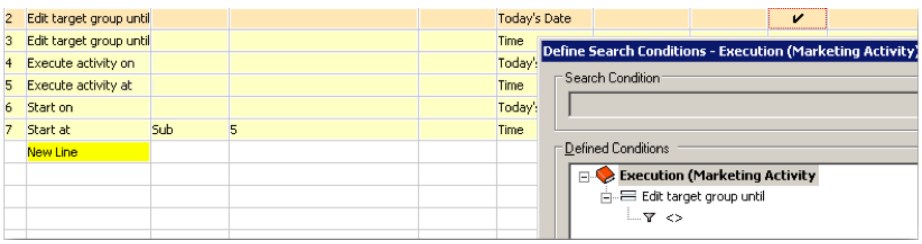
This trigger is used to create a target group. The trigger is called via the button "CORE_AD_CreateTargetGroup"(menuaction"CORE_A_AD_GenerateTargetGroup") and via the context menu of AD "CORE_A_AD_GenerateTargetGroup".

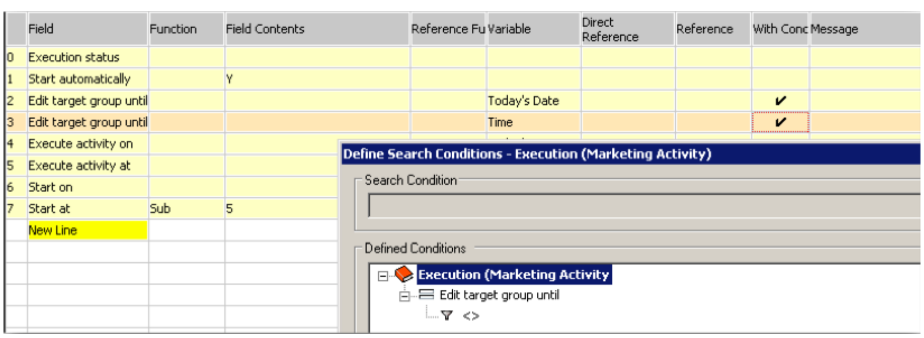


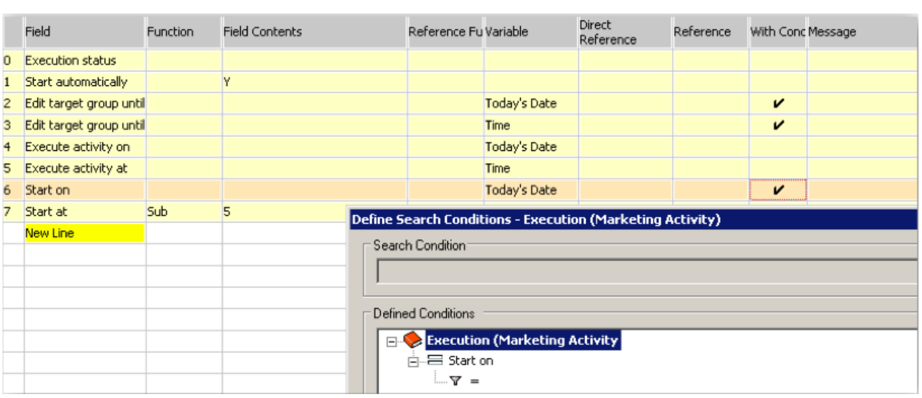
Trigger CORE_AD_UPD_ExecuteMarketingActivity

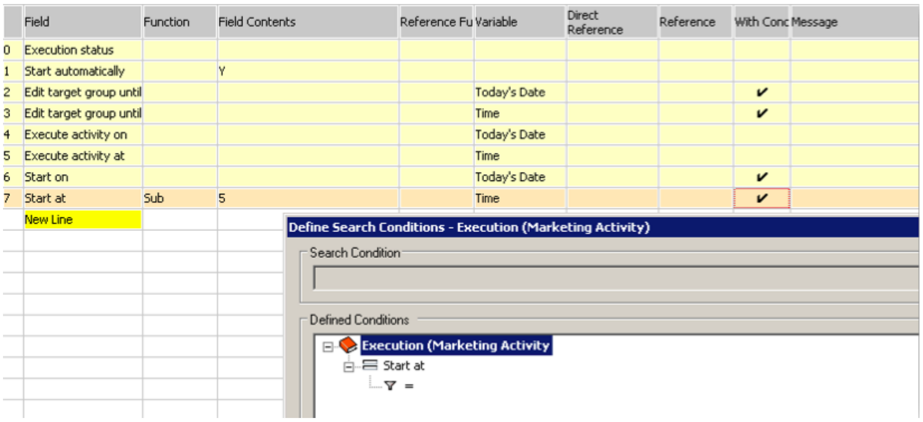
This trigger is used to start the Marketing Activity. It is called via the button "CORE_AD_StartMarktingActivity"(action"CORE_A_AD_ExecuteMarketingActivity") and via the context menu of AD "CORE_A_AD_ExecuteMarketingActivity". As it is not necessary to create a target group first in order to start a marketing activity, the trigger checks (With Condition) if a target group was created or not – and acts accordingly.


Triggers
Name CORE_AD_UPD_ExecuteMarketingActivity
Info Area Execution (Marketing Activity)
Action Edit/update
Search Index
Mask
Format Name
Accomp. Text
Search Condition
Plausibility check
Prior to saving
Interactive
Abort
Suppress subsequent triggers
Record prior to change
Single/serial letter
WEB Level
E-mail
Field
Function
Field Contents
Reference Fu
Variable
Direct Reference
Reference
With Conc
Message
0 Execution status
1 Start automatically Y
2 Edit target group until Today's Date
3 Edit target group until Time
4 Execute activity on Today's Date
5 Execute activity at Time
6 Start on Today's Date
7 Start at Sub 5 Time
New Line


2 Edit target group until Today's Date
3 Edit target group until Time
4 Execute activity on
5 Execute activity at Time
6 Start on
7 Start at Sub 5 Time
New Line
Define Search Conditions - Execution (Marketing Activity)
Search Condition
Defined Conditions
Execution (Marketing Activity
Edit target group until
<>

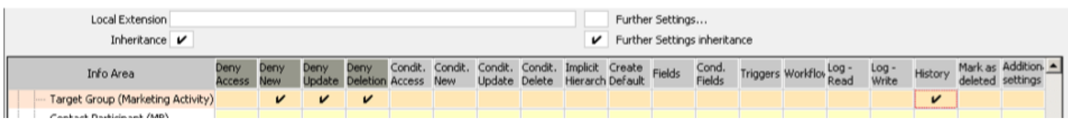

Field
Function
Field Contents
Reference Fu
Variable
Direct Reference
Reference
With Conc
Message
0 Execution status
1 Start automatically Y
2 Edit target group until Today's Date
3 Edit target group until Time
4 Execute activity on
5 Execute activity at
6 Start on
7 Start at Sub 5
New Line
Define Search Conditions - Execution (Marketing Activity)
Search Condition
Defined Conditions
Execution (Marketing Activity
Edit target group until
<>


Field
Function
Field Contents
Reference Fu
Variable
Direct Reference
Reference
With Conc
Message
0 Execution status
1 Start automatically Y
2 Edit target group until Today's Date
3 Edit target group until Time
4 Execute activity on Today's Date
5 Execute activity at Time
6 Start on Today's Date
7 Start at Sub 5
New Line
Define Search Conditions - Execution (Marketing Activity)
Search Condition
Defined Conditions
Execution (Marketing Activity
Start on
=



Rights for Info Target Group (Marketing Activity) (AG)

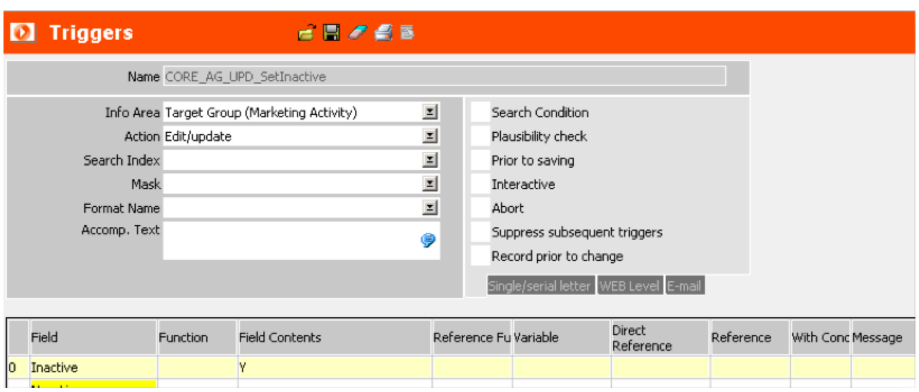
In the main right the info area is defined as visible but no new, update or delete.



Trigger for Info Target Group (Marketing Activity) (AG)

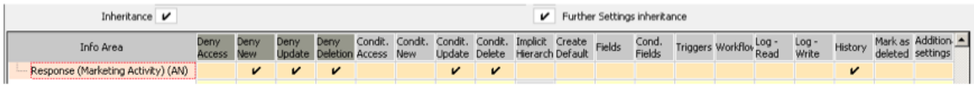
Trigger CORE_AG_UPD_SetInactive

This trigger is used to set the flag “Inactive” in an AG record. Thus the user does not have to touch each single record and set the flag, but select several records and uses the button. The trigger is called via the button “CORE_AG_SetInactive”.

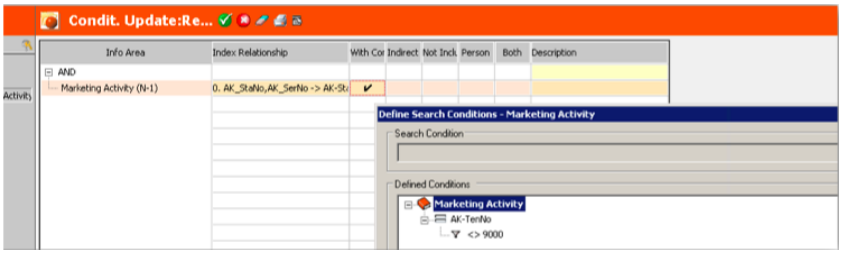


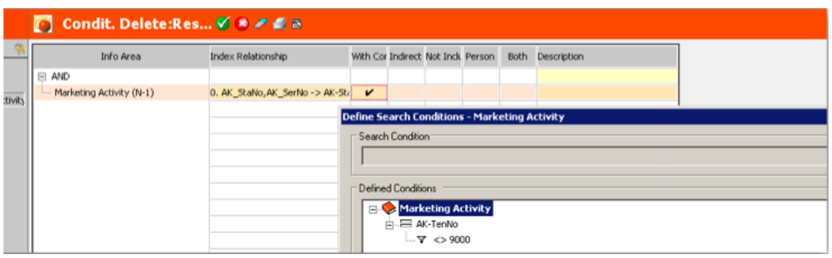
Rights for Info Area Response (Marketing Activity) (AN)

In the main right the info area is defined as visible but no new, update or delete.



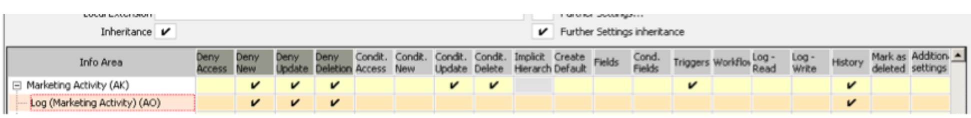
It’s also defined that records that belong to marketing activities (AK) with tenant 9000 are not allowed to be updated or deleted – as they are part of the template and should be “upgradeable”.





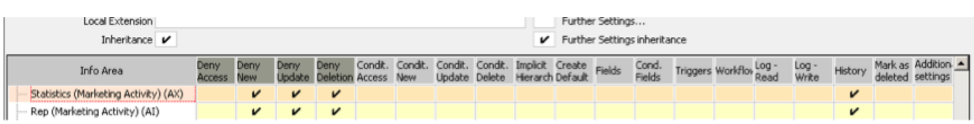
Rights for Info Area Response (Marketing Activity) (AO)

In the main right the info area is defined as visible but no new, update or delete.



Rights for Info Area Statistics (Marketing Activity) (AX) and Rep (Marketing Activity) (AI)

In the main right the info area is defined as visible but no new, update or delete.



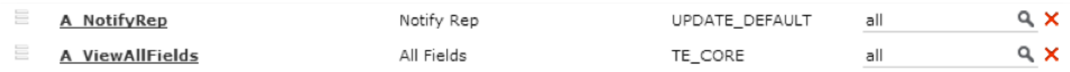
History

Learn about the configuration of History infoarea.

The history for all info areas is activated (see Rights & Triggers on page 100 for the CM, AK, AD, AN, AG, AO, AX, AI, V1, V2, V3, V4, V5 and V6 info areas). The ExpandChildren header of the header groups have the "History" (H0) info area configured – but they are assigned to the "History" CRM process and therefore only visible if the user has access to this process.

Notify Rep and All Fields function in context menus.

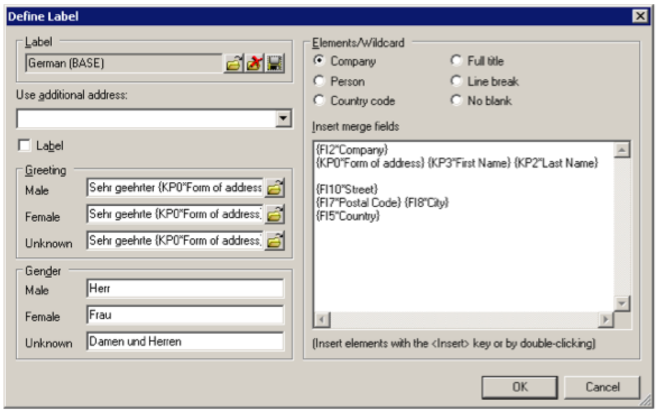
The "A_NotifyRep" and "A_ViewAllFields" menu items must be defined for all context menus:



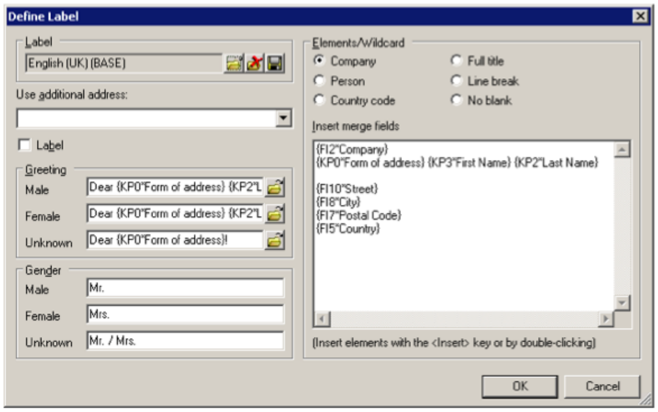
"Notify Rep" is visible in general, "All Fields" is assigned to the "All Fields" CRM process and only visible if the user has access to this process.

Label Formats

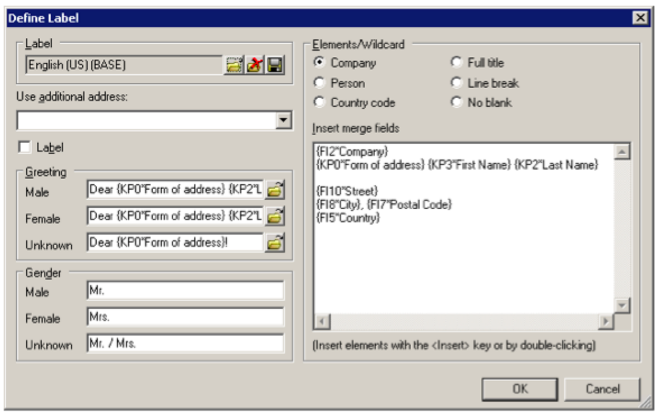
German (Base)



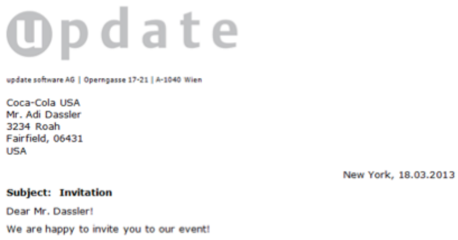
English (UK) (BASE)



English (US) (BASE)



Those labels are used based on the label value in the FI or KP record and therefore forms the content of the pre-defined documents CORE_German_Invitation.doc and CORE_English_Invitation.doc.



update

update software AG | Operngasse 17-21 | A-1040 Wien

Coca-Cola USA
Mr. Adi Dassler
3234 Roah
Fairfield, 06431
USA

New York, 18.03.2013

Subject: Invitation

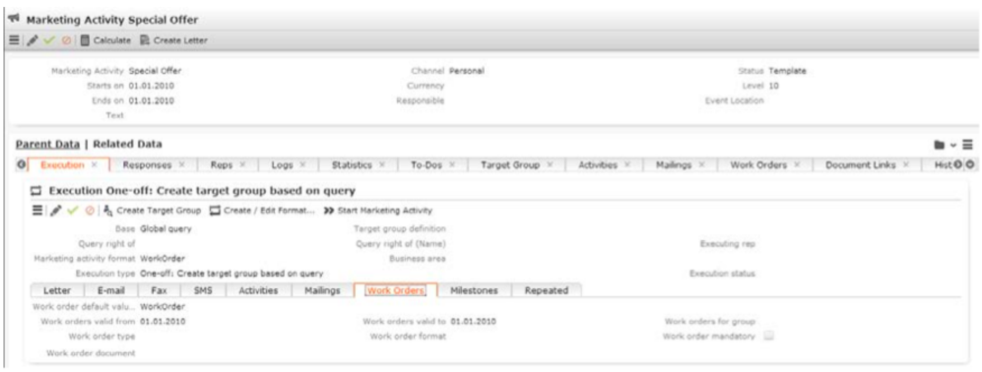
Dear Mr. Dassler!

We are happy to invite you to our event!

Marketing Activity Templates

The following activity template are defined:

“Special Offer” / “Aktion” (StNo: 10002 INo: 1025)



This template is used to create work orders (AF records) without any campaign – e.g. for special offers. If the special offer (AT) is linked to the marketing activity record and a AF record for the visited person exists, the products defined in the special offer are displayed e.g. in the sample dialog when clicking the button “Special Offer” in the serial entry.

Campaign Templates

The following campaign templates are defined:

Template: Product Promotion (StNo: 10000 INo: 5)

- Marketing Activity & Execution “Product Information”
- Marketing Activity & Execution “Follow-Up”
- Marketing Activity & Execution “Consultation”

Vorlage: Produktpromotion (StNo: 10000 INo: 11)

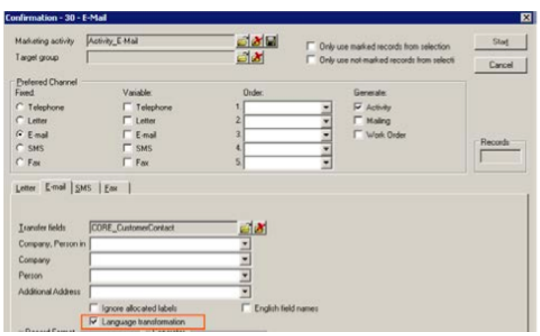
- Marketing Activity & Execution “Produktinformation”
- Marketing Activity & Execution “Nachverfolgung”
- Marketing Activity & Execution “Beratung”

Documents

Learn to manage language for documents.

CORE_ProductInformation_E-Mail.html (StNo: 10000 INo: 186)

The document is designed to send the E-Mail in the language of the recipient. Due to the fact that the Marketing Activity Format “Activity_E-Mail” has set the flag “Language transformation” to true:



...the value of the field Language is transferred accordingly to the document and an IF-ELSE-Statement delivers the right text to the e-mail sent.

E-Mail Template	Recipient with Language “German”	Recipient with Language “English” or any other language
<%$IF KPLanguage = 'Deutsch'%> Betreff: Produktinformation <%$ELSE%> Subject: Product Information <%$FI%>	update update software AG | Operngasse 17-21 | A-1040 Wien **Betreff: Produktinformation** Sehr geehrter Herr Steinholzer! Wir freuen uns, Sie über unser neues Produkt informieren zu können.	update update software AG | Operngasse 17-21 | A-1040 Wien **Subject: Product Information** Dear Mrs. Swaney! We are happy to inform you about our new product.

If you want to add another language you would extend the IF-ELSE-Statement the following way

<%$IF KPLanguage = 'Deutsch'%> Betreff: Produktinformation **<%$IF KPLanguage = 'Franc ais'%> Objet: Validation** <%$ELSE%> Subject: Product Information <%$FI%>

The value in the IF-ELSE-Statement has to be in the language of the user’s catalogue value

0001 TE_BASE	0101 TE_English_LSI	Spe	0102 TE_French_LSI	Spe	0103 TE_Spanish_LSI	Spe	0107 TE_Italian_LSI
Chinese (BASE)	Chinese		Chinois		Chino		Cinese
Croatian (BASE)	Croatian		Croate		Croata		Croato
Czech (BASE)	Czech		Tchèque		Checo		Ceco
Danish (BASE)	Danish		Danois		Danés		Danese
Dutch (BASE)	Dutch		Néerlandais		Neerlandés		Oland.
English (BASE)	English						
Finnish (BASE)	Finnish		Finnois		Finlandés		Finland.
French (BASE)	French		Français		Francés		Francese
German (BASE)	German						
Greek (BASE)	Greek		Grec		Griego		Greco
Hungarian (BASE)	Hungarian		Hongrois		Húngaro		Ungherese
Italian (BASE)	Italian		Italien		Italiano		Italiano
Japanese (BASE)	Japanese		Japonais		Japonés		Giapponese
Korean (BASE)	Korean		Coréen		Coreano		Coreano
Norwegian (BASE)	Norwegian		Norvégien		Noruego		Norvegese
Polish (BASE)	Polish		Polonais		Polaco		Polacco
Portuguese (BASE)	Portuguese		Portugais		Portugués		Portoghese
Romanian (BASE)	Romanian		Roumain		Rumano		Romeno
Russian (BASE)	Russian		Russe		Ruso		Russo
Serbian (BASE)	Serbian		Serbe		Serbio		Serbo
Slovak (BASE)	Slovak		Slovaque		Eslovaco		Slovacco
Slovenian (BASE)	Slovenian		Slovène		Esloveno		Sloveno
Spanish (BASE)	Spanish		Espagnol		Español		Spagnolo

Default Values

Learn about the defined default values.

The following Default Value formats are defined:

Format — With Conditions:Format

Statioı	Type	User	Name	Created on	Version (cockpit package)	Name (cockpit package)
10000	Info Area Default Values		Besuch Beratung	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Brief Einladung	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		E-Mail Bestätigung	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		E-Mail Confirmation	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		E-Mail Product Information	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		E-Mail Produktinformation	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Event Event	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Letter Invitation	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Telefone Nachverfolgung	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Telephone Follow-Up	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Veranstaltung Veranstaltung	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Visit Consultation	15.01.2013	8.0.3.29	TE_BASE

Catalogs

Here you can find the list of *Fixed* and *Variable* catalog.

Fixed Catalog

5 Activity status (Activity (MA))

Activity status (Activ...

Code	Original	Icon	Reference (Text)	Loc	Language-independ	Loc	0001 TE_BASE	Loc	0002 TE_Docu	Loc	0003 TE_Pool	Loc	0100 TE_German_L	Loc	0101 TE_English_LS
0	Scheduled				Scheduled								Geplant		Scheduled
1	Completed				Completed								Erledigt		Completed
2	Missed				Missed								Versäumt		Missed

6 Activity Result (Activity (MA))

Activity result (Activi...

Code	Original	Icon	Reference (Text)	Loc	Language-independ	Loc	0001 TE_BASE	Loc	0002 TE_Docu	Loc	0003 TE_Pool	Loc	0100 TE_German_L	Loc	0101 TE_English_LS
0															
1	Successful				Successful								Erfolgreich		Successful
2	Appointment				Activity planned								Aktivität geplant		Activity planned
3	Not Reached				Not reached								Nicht erreicht		Not reached
4	Leave Alone				Does not want conta								Möchte keinen Konta		Does not want conta

Code 4:

- TE_German: Mo chte keinen Kontakt mehr
- TE_English: Does Not Want Contact Any More

9 Priority (Activity (MA))

-x- (Activity (MA))

Code	Original	Icon	Reference (Text)	Loc	Language-independ	Loc	0001 TE_BASE	Loc	0002 TE_Docu	Loc	0003 TE_Pool	Loc	0100 TE_German_L	Loc	0101 TE_English_LS
0	High				High								Hoch		High
1	Medium				Medium								Mittel		Medium
2	Low				Low								Niedrig		Low

40 Execution Status (Marketing Activity (AK))

Execution Status (Ma...

Code	Original	Icon	Reference (Text)	Loc	Language-independ	Loc	0001 TE_BASE	Loc	0002 TE_Docu	Loc	0003 TE_Pool	Loc	0100 TE_German_L	Loc	0101 TE_English_LS
0															
1	Open				Open								Offen		Open
2	Completed				Completed								Erledigt		Completed
3	Warning				Warning								Warnung		Warning
4	Error				Error								Fehler		Error
5	Aborted				Aborted								Abgebrochen		Aborted

44 Status (Marketing Activity (AK))

Status (Marketing Ac...

Code	Original	Icon	Reference (Text)	Loc	Language-independ	Loc	0001 TE_BASE	Loc	0002 TE_Docu	Loc	0003 TE_Pool	Loc	0100 TE_German_L	Loc	0101 TE_English_LS
0	Scheduled				Scheduled								Geplant		Scheduled
1	In Progress				In Progress								In Bearbeitung		In Progress
2	Completed				Completed								Erledigt		Completed
3	Canceled				Canceled								Abgebrochen		Canceled
4	Archive				Archive								Archiv		Archive
5	Template				Template								Vorlage		Template
6	Budget Approval				Budget Approval								Freigabe		Budget Approval

46 Process (Log (Marketing Activity) (AO))

Process (Log (Market...

Code	Original	Icon	Reference (Text)	Loc	Language-independ	Loc	0001 TE_BASE	Loc	0002 TE_Docu	Loc	0003 TE_Pool	Loc	0100 TE_German_LS	Loc	0101 TE_English_LS
0	Selection		10002,21935		Selection / Query								Selektion		Selection
1	Target Group				Target Group								Zielgruppe		Target Group
2	Generated				Generated								Generiert		Generated
3	Completed				Completed								Erledigt		Completed
4	Canceled				Canceled								Abgebrochen		Canceled
5	Archive				Archive								Archiv		Archive
6	Template				Template								Vorlage		Template

48 Repeated: Frequency (Unit) (Offer (PR))

Repeated: Frequency...

Code	Original	Icon	Reference (Text)	Loc	Language-independ	Loc	0001 TE_BASE	Loc	0002 TE_Docu	Loc	0003 TE_Pool	Loc	0100 TE_German_LS	Loc	0101 TE_English_LS
0															
1	Min				Min								Minute(n)		Minute(s)
2	Hours				Hours								Stunde(n)		Hour(s)
3	Day(s)				Day(s)								Tag(e)		Day(s)
4	Week(s)				Week(s)								Woche(n)		Week(s)
5	Month(s)				Month(s)								Monat(e)		Month(s)
6	Year(s)				Year(s)								Jahr(e)		Year(s)

49 Execution type (Execution (Marketing Activity) (AD))

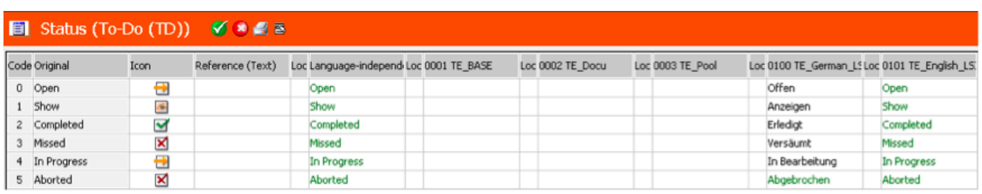
Execution type (Exec...

Code	Original	Icon	Reference (Text)	Loc	Language-independ	Loc	0001 TE_BASE	Loc	0002 TE_Docu	Loc	0003 TE_Pool	Loc	0100 TE_German_LS	Loc	0101 TE_English_LS
0															
1	One-off, execute se				One-off: Create tar								Einmalig: Zielgruppe		One-off: Create tar
2	One-off, do not exe			✔	One-off: Do not exe								Einmalig: Selektion n		One-off: Do not exe
3	One-off, only respo				One-off: Create tar								Einmalig: Zielgruppe		One-off: Create tar
4	Repeated, always e				Repeated: Create t								Wiederholt: Zielgrup		Repeated: Create t
5	Repeated, execute			✔	Repeated: Create t								Wiederholt: Selektio		Repeated: Create t
6	Repeated, never ex			✔	Repeated: Never ex								Wiederholt: Selektio		Repeated: Never ex
7	Repeated, only resp				Repeated: Create t								Wiederholt: Zielgrup		Repeated: Create t
8	Repeated, packages				Repeated: Send in p								Wiederholt: In Paket		Repeated: Send in p
9	Repeated, extend s				Repeated: Extend t								Wiederholt: Zielgrup		Repeated: Extend t

Hinweis: Die Texte in grau sollten gesperrt – sprich nicht sichtbar sein.

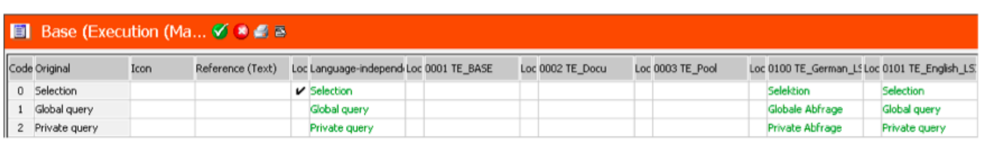
TE_German	Sprachunabha ngig / TE-English
Einmalig: Zielgruppe durch Abfrage er-stellen	One-off: Create target group based on query
Einmalig: Selektion nicht durchfu hren	One-off: Do not execute selection
Einmalig: Zielgruppe aufgrund von Reaktion/ Neuzugang erstellen	One-off: Create target group based on response / new entry
Wiederholt: Zielgruppe jedes Mal neu durch Abfrage erstellen	Repeated: Create target group based on query every time new
Wiederholt:Selektioneinmaldurchfu hren	Repeated: Create target group based on selection once
Wiederholt: Selektion nie durchfu hren	Repeated: Never execute selection
Wiederholt: Zielgruppe aufgrund von Reaktion / Neuzugang erstellen	Repeated: Create target group based on responses
Wiederholt: In Paketen durchfu hren	Repeated: Send in packets
Wiederholt: Zielgruppe jedes Mal durch Abfrageergebnisse erweitern	Repeated: Extend target group based on query results

55 Status (To-Do (TD))


Status (To-Do (TD))

Code	Original	Icon	Reference (Text)	Loc	Language-independ	Loc	0001 TE_BASE	Loc	0002 TE_Docu	Loc	0003 TE_Pool	Loc	0100 TE_German_LS	Loc	0101 TE_English_LS
0	Open				Open								Offen		Open
1	Show				Show								Anzeigen		Show
2	Completed				Completed								Erledigt		Completed
3	Missed				Missed								Versäumt		Missed
4	In Progress				In Progress								In Bearbeitung		In Progress
5	Aborted				Aborted								Abgebrochen		Aborted

60 Base (Execution (Marketing Activity) (AD)


Base (Execution (Ma...

Code	Original	Icon	Reference (Text)	Loc	Language-independ	Loc	0001 TE_BASE	Loc	0002 TE_Docu	Loc	0003 TE_Pool	Loc	0100 TE_German_LS	Loc	0101 TE_English_LS
0	Selection			✔	Selection								Selektion		Selection
1	Global query				Global query								Globale Abfrage		Global query
2	Private query				Private query								Private Abfrage		Private query

Variable Catalogues

310 Camp. Type (Marketing Activity)

Catalog

Camp. Type (Marketing Activity) — Records 4

Tenant	External Key	Loc	0001 TE_BASE	External Key	Loc	0100 TE_German_LSI	External Key	Loc	0101 TE_English_LSI
9000	10000_372_1		Event (BASE)			Veranstaltung			Event
9000	10000_372_3		Newsletter (BASE)			Newsletter			Newsletter
9000	10000_372_2		Promotion (BASE)			Promotion			Promotion
9000	10002_310_2		Quick Campaign (BASE)			Schnellkampagne			Quick Campaign

16 Marketing Activity

Catalog

Marketing Activity (Marketing A — Records 12

Tenant	External Key	Loc	0001 TE_BASE	External Key	Loc	0100 TE_German_LSI	External Key	Loc	0101 TE_English_LSI
9000	10000_20_4		Christmas Card (BASE)			Weihnachtskarte			Christmas Card
9000	10000_20_6		Confirmation (BASE)			Bestätigung			Confirmation
9000	10000_20_7		Consultation (BASE)			Beratung			Consultation
9000	10000_20_10		Event (BASE)			Veranstaltung			Event
9000	10000_20_8		Follow-up (BASE)			Nachverfolgung			Follow-up
9000	10000_20_9		Invitation (BASE)			Einladung			Invitation
9000	10000_20_11		Newsletter (BASE)			Newsletter			Newsletter
9000	10000_20_1		Offer (BASE)			Angebot			Offer
9000	10000_20_2		Product Information (BASE)			Produktinformation			Product Information
9000	10000_20_5		Quick Campaign (BASE)			Schnellkampagne			Quick Campaign
9000	10002_16_22		Special Offer (BASE)			Aktion			Special Offer
9000	10000_20_3		Survey (BASE)			Umfrage			Survey

60 Act. Variation (Marketing Activity)

Catalog

Act. Variation (Marketing Activi — Records 7

Tenant	External Key	Loc	0001 TE_BASE	External Key	Loc	0100 TE_German_LSI	External Key	Loc	0101 TE_English_LSI
9000	10000_161_2		E-Mail (BASE)			E-Mail			E-Mail
9000	10000_161_6		Fax (BASE)			Fax			Fax
9000	10000_161_1		Letter (BASE)			Brief			Letter
9000	10000_161_3		Personal (BASE)			Persönlich			Personal
9000	10000_161_7		Preferred Channel (BASE)			Bevorzugter Kanal			Preferred Channel
9000	10000_161_5		SMS (BASE)			SMS			SMS
9000	10000_161_4		Telephone (BASE)			Telefon			Telephone

24 Act. Response (Marketing Activity)

Catalog

Act. Response (Marketing Activ — Marketing Activity[M1-TenNo:9000]: Confirmation — Records 1

Tenant	External Key	Sort Order	Loc	0001 TE_BASE	External Key	Sort Order	Loc	0100 TE_German_LSI	External Key	Sort Order	Loc	0101 TE_English_LSI
9000	10002_24_14_1			OK (BASE)				OK				OK

Catalog

Act. Response (Marketing Activ — Marketing Activity[M1-TenNo:9000]: Consultation — Records 2

Tenant	External Key	Loc	0001 TE_BASE	External Key	Loc	0100 TE_German_LSI	External Key	Loc	0101 TE_English_LSI
9000	10000_52_7_2		Product Not Sold (BASE)			Produkt verkauft			Product Not Sold
9000	10000_52_7_1		Product Sold (BASE)			Produkt nicht verkauft			Product Sold

Catalog

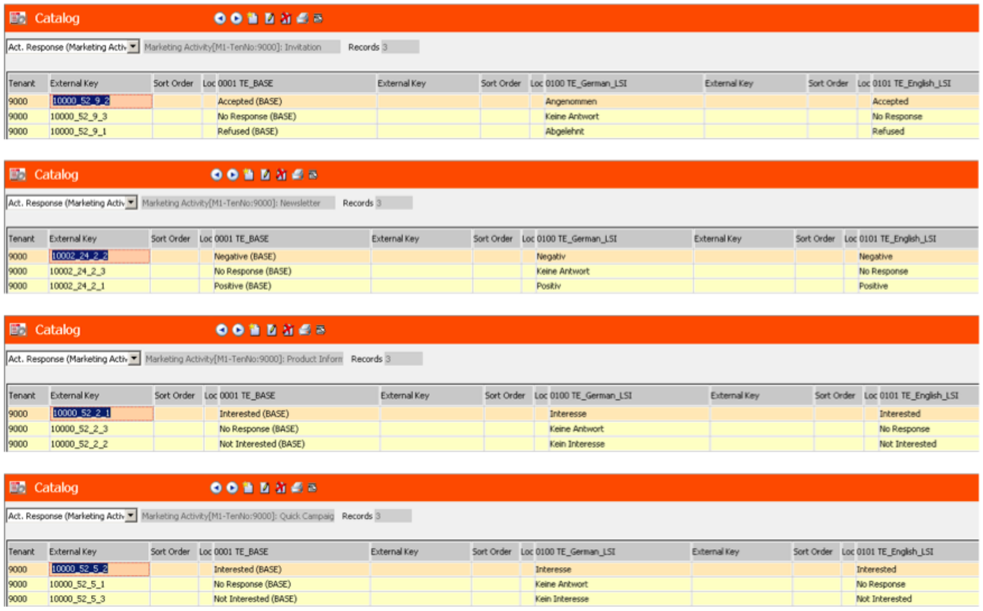
Act. Response (Marketing Activ — Marketing Activity[M1-TenNo:9000]: Event — Records 2

Tenant	External Key	Loc	0001 TE_BASE	External Key	Loc	0100 TE_German_LSI	External Key	Loc	0101 TE_English_LSI
9000	10000_52_10_1		Attended (BASE)			Teilgenommen			Attended
9000	10000_52_10_2		Did Not Attend (BASE)			Nicht teilgenommen			Did Not Attend

Catalog

Act. Response (Marketing Activ — Marketing Activity[M1-TenNo:9000]: Follow-up — Records 3

Tenant	External Key	Sort Order	Loc	0001 TE_BASE	External Key	Sort Order	Loc	0100 TE_German_LSI	External Key	Sort Order	Loc	0101 TE_English_LSI
9000	10000_52_8_2			Interested (BASE)				Interesse				Interested
9000	10000_52_8_1			No Response (BASE)				Keine Antwort				No Response
9000	10000_52_8_3			Not Interested (BASE)				Kein Interesse				Not Interested



Designer Configuration

Learn about the basic designer configuration for campaign management.

Standard elements for CM, AK, AD, AI, AN, AO, AX, AG, V1, V2, V3, V4, V5, V6

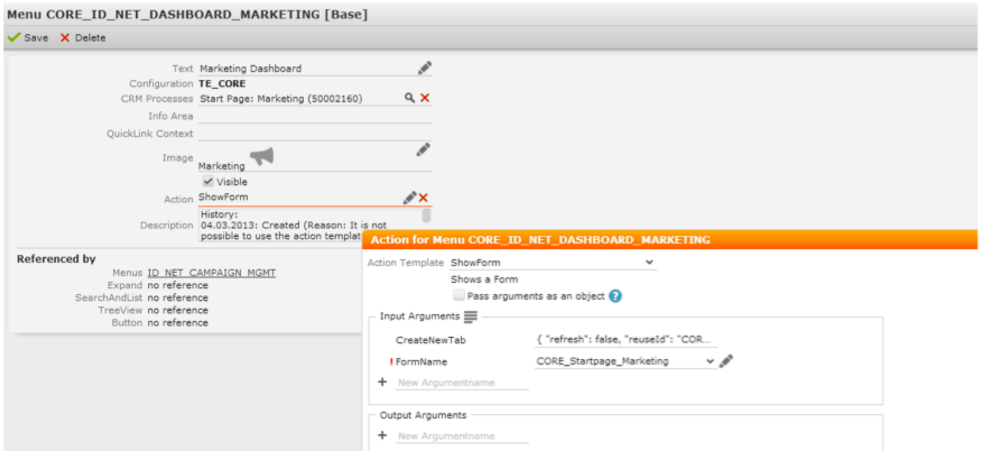
The standard elements (Search&List, Expand, Table Caption, Field Group and Header) were defined in the BASE configuration in order to provide a unified layout of fields, tabs etc. in all templates. Just in a few cases (e.g. AD mask in LSI) the elements were changed in the industry specific template itself.

- Standard elements:

ID_NET_CAMPAIGN_MGMT, AK-CM, AKNew, ID_NET_ACTIVITY, CMTree, Select-Campaign->Return, SelectTemplateCampaign->CopyCampaign, M_Activity, M_ActivityExecution, ID_NET_NEWCAMPAIGN, MarketingActiviyExecution, ID_NET_CAMPAIGNS, ID_NET_ACTIVITY_NEW, ID_NET_TOPIC, ID_NET_STARTPAGE_MARKETING, M_EventParticipant, M_AgendaItem, AGSublistNew, New Activity, New ActivityToCampaign, SelectTemplateMarketingActivity->CopyMarketingActivity, AGSublistNew, NewCampaign, M_Expand_Delete, A_DefaultValuesForWorkorder, A_DefaultValuesForMailing

These standard elements from UPDATE_DEFAULT were defined in the BASE configuration in order to provide a unified layout / behavior in all templates.

- Menu CORE_ID_NET_DASHBOARD_MARKETING



CreateNewTab: { "refresh": false, "reuseId": "CORE_ID_NET_DASHBOARD_MARKETING" }

- Menu CORE_ID_NET_CM_Templates
- Menu CORE_ID_NET_CalculateEvaluations

Displays the standard elements for calculating lecture subject and speaker evaluation and accommodation and venue evaluation. As this functionality is not available with update CRM SP0 the menu is set to invisible.

- Tree View CM

The tree view is the main view for the campaign

- Table Caption CORE_CM_Analyses

Used in the tree view CM to name the node that displays the analysis in the tree view

- Menu CORE_M_CM

Context menu of the info area CM

- HeaderGroup CORE_AN_CM

Used in the ExpandChildren-Header of Header Group CM to offer NO new button for Response (AN) records in the sub list of Campaign (CM) mask.

- Field Group CORE_AK_CM

Defined elements: List, Search and MiniDetails. Used in the ExpandChildren-Header of Header Group CM – in order to display the sub list of marketing activities (AK) records below a campaign.

- Form CORE_AD

Used to display the AD record below the AK mask – used in ExpandChildren-Header AK and ExpandChildren-Header AK-CM

The AD mask offers – additionally to the other templates – the field Business area (AD/47). This allows to choose a value of the catalogue Business Area:

When the target group is created and a value is selected here, the reps for the target group (AG records) are NOT taken from the FI or KP record, but from the assigned account manager record (SB) with the corresponding value in the field business area (SB/56). This is standard business logic – so no triggers etc. were implemented in the template for this functionality.

- ExpandChildren-Header AK
- Search&List and Field Group CORE_BR_AK

Defined elements: List and Search. Used in the CM tree view for the Mailing node (BR)

- Search&List and Field Group CORE_BR_FI

Defined elements: List and Search. Used in the FI tree view for the Mailing node (BR)

- Search&List and Field Group CORE_BR_KP

Defined elements: List and Search. Used in the FI tree view for the Mailing node (BR) under the KP record node

- Search&List and Field Group CORE_AF_AK

Defined elements: List and Search. Used in the CM tree view for the Work Order node (AF)

- Search&List and Field Group CORE_AF_FI

Defined elements: List and Search. Used in the FI tree view for the Work Order node (AF)

- Search&List and Field Group CORE_AF_KP

Defined elements: List and Search. Used in the FI tree view for the Work Order node (BR) under the KP record node

- ExpandChildren-Header AK-CM
- Field Groups MA, MA_ServiceStartpage, MAEmail, MATel, MAVisit, TE_MA_CallDocumentationProcess_Prepare

These field groups have a Details control defined that holds the following tab

- Form CORE_CM_Analyses

Used to display two analysis directly in the CM tree view

- Query CORE_CM
- Analysis CORE_CM_ParticipationStatus

Based on the query CORE_CM – displayed in the Form CORE_CM_Analyses, which is shown in the CM tree. Displays all attendees of this event (V1 records) based on their participation status.

- Analysis CORE_CM_Activities

Based on the query CORE_CM – displayed in the Form CORE_CM_Analyses, which is shown in the CM tree

- Form CORE_Startpage_Marketing

These settings prevent the start page calendar to change if the user changes his/her settings in the “standard calendar”:

Analysis CORE_CM_ParticipationStatus_All

Based on the query CORE_CM – displayed in the Form CORE_Startpage_Marketing. Displays all Attendees of all events (V1 records) based on their participation status. Assigned to CRM process Campaign Management.

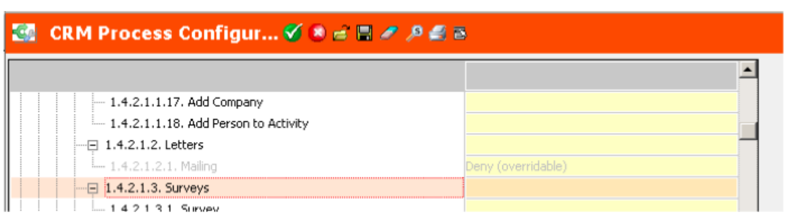
- Analysis CORE_CM_Activities_Results

Based on the query CORE_CM – displayed in the Form CORE_Startpage_Marketing. Displays all activities of

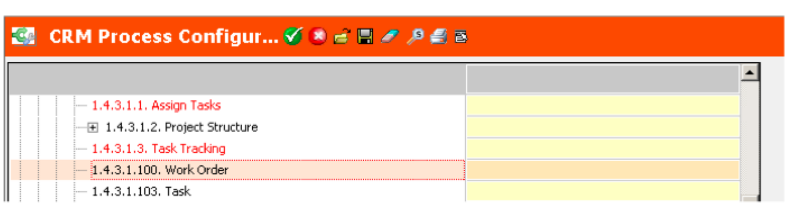
all events (MA records) based on their result. Assigned to CRM process Campaign Management.   Tree View FI

The following elements were included into the FI tree view.

- The Mailing (BR) nodes should only be visible if the role of the current user has access to the CRM process “1.4.2.1.2.1 Mailing” The standard CRM process configuration has denied the access to this CRM process.



- The Work Order (AF) nodes should only be visible if the role of the current user has access to the CRM process "1.4.3.1.100"Work Order" The standard CRM process configuration allows accessing this CRM Process



- Filter AK.CORE_NoTemplate
- Filter AK.CORE_Template
- Filter CM.CORE_MyCurrentCM
- Filter CM.CORE_NoTemplate
- Filter CM.CORE_Template
- Queries AK.FindAsYouType, CM.FindAsYouType, F1.FindAsYouType, FI.FindAsYouType, KP.FindAsYouType, MA.FindAsYouType, V1.FindAsYouType, V2.FindAsYouType, V4.FindAsYouType

Defined to enable find as you type functionality in various info areas for the campaign and event management.

- Expand Page AK

Defines that the default action for the info area is CORE_A_OpenRecordInCMTreeview – this is responsible for opening an AK record that “belongs” to a campaign (CM) is opened in the tree view of the campaign and an AK record that is “standalone” (does not belong to a campaign) is opened in the tab view of AK.

- Menu CORE_A_OpenRecordInCMTreeview
- Process CORE_AK_OpenRecord
- Step CORE_AK_OpenRecord_Dispatching
- Step CORE_AK_OpenRecord_Tree
- Step CORE_AK_OpenRecord_Expand
- Field Group CORE_TD_AK

Defined element: List. Used to display the TD records as sub list of AK mask.

Button CORE_AK_CreateSerialLetter

Used to create a mail merge letter from control file and document template

- Button CORE_AD_CreateTargetGroup
- Menu CORE_A_AD_GenerateTargetGroup
- Button CORE_AD_StartMarktingActivity
- Menu CORE_A_AD_ExecuteMarketingActivity
- Images CORE_CAT_CAMPAIGNSTATUS_0 - CORE_CAT_CAMPAIGNSTATUS_6

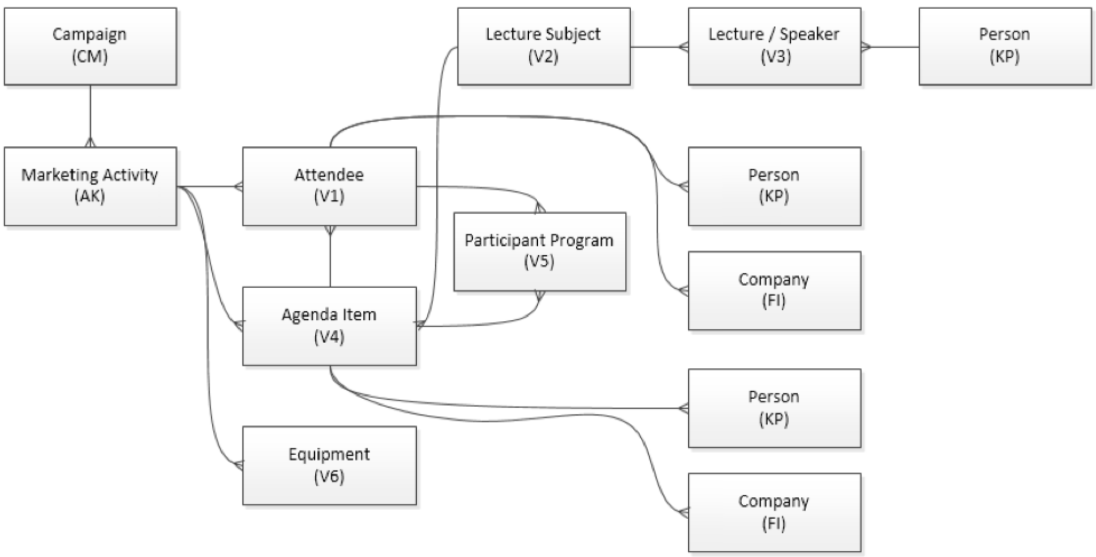
Files: u8-open.png, u8-progress.png, u8-completed.png, u8-missed.png, u8-archive.png, u8-template.png, u8-budget-approval.png

Used in the Field Group CM, field Status, Field Attribute: Large Image Template

- Table Caption CMTree

Event Management (CRM #70000090)

Learn about event management configurations.



Process Rework Target Group

This process is designed to support the re-working of an automatically generated target group by an e.g. sales rep.

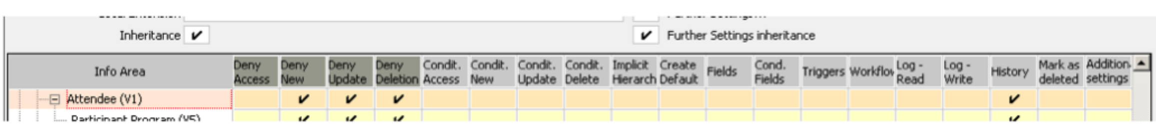
Rights and Triggers

Learn about the rights for various info areas.

Rights for following info areas are defined:

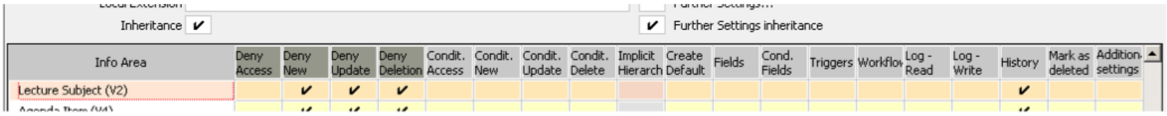
- Rights for Info Attendee (V1)

In the main right the info area is defined as visible but no new, update or delete



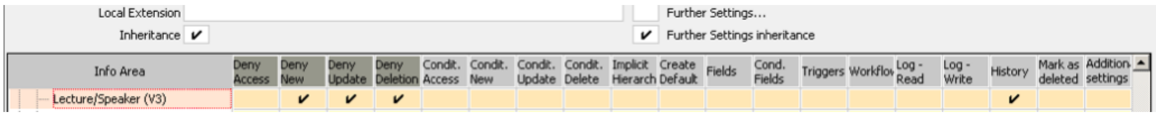
- Rights for Info Lecture Subject (V2)

In the main right the info area is defined as visible but no new, update or delete



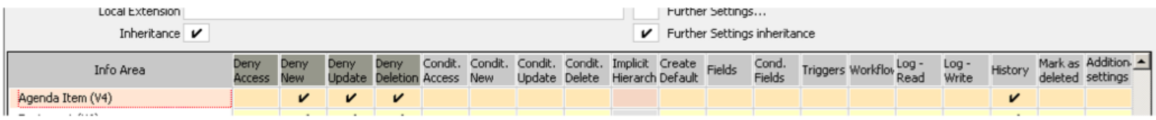
- Rights for Info Lecture/Speaker (V3)

In the main right the info area is defined as visible but no new, update or delete.



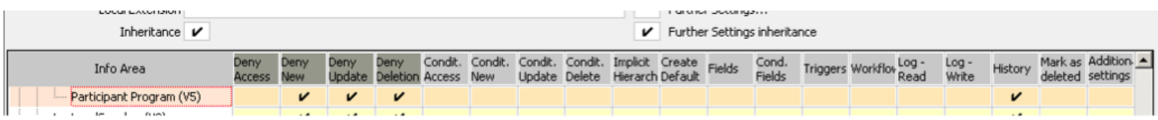
- Rights for Info Agenda Item (V4)

In the main right the info area is defined as visible but no new, update or delete.



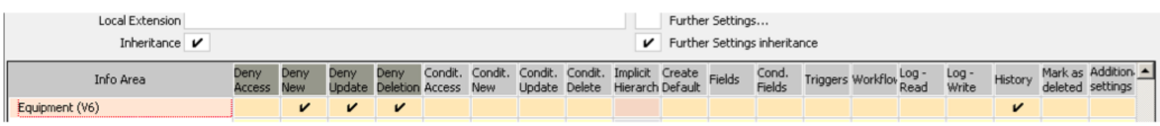
- Rights for Info Participant Program (V5)

In the main right the info area is defined as visible but no new, update or delete.



- Rights for Info Area Equipment (V6)

In the main right the info area is defined as visible but no new, update or delete.



Campaign Templates

Learn about the defined campaign template.

The following campaign templates are defined:

Template: Event (StNo: 10000 INo: 7)

- Marketing Activity & Execution “Invitation”
- Marketing Activity & Execution “Follow-Up”
- Marketing Activity & Execution “Confirmation”
- Marketing Activity & Execution “Event”

Vorlage: Veranstaltung (StNo: 10000 INo: 10)

- Marketing Activity & Execution “Einladung”
- Marketing Activity & Execution “Nachverfolgung”
- Marketing Activity & Execution “Besta tigung”
- Marketing Activity & Execution “Veranstaltung”

Documents

- CORE_Confirmation_E-Mail.html (StNo: 10000 INo: 191)

  See information about language in topic Campaign Management / Documents.
- CORE_German_Invitation.doc (StNo: 10000 INo: 191)
- CORE_English_Invitation.doc (StNo: 10000 INo: 187)

Catalogs

Learn about the variable catalog.

Variable Catalogs

486 Participant type

Tenant	External Key	Sort Order	Loc	0001 TE_BASE	External Key	Sort Order	Loc	0100 TE_German_LSI	External Key	Sort Order	Loc	0101 TE_English_LSI
9000	10000_486_4			Own Staff (BASE)				Eigener Mitarbeiter				Own Staff
9000	10000_486_1			Participant (BASE)				Teilnehmer				Participant
9000	10000_486_2			Speaker (BASE)				Sprecher				Speaker
9001	10002_443_3			Staff (BASE)				Mitarbeiter				Staff
9000	10000_486_3			VIP Participant (BASE)				VIP-Teilnehmer				VIP Participant

489 Topic category

Catalog

Topic category (Lecture Subjec

Records 9

Tenant	External Key	Sort Order	Loc	0001 TE_BASE	External Key	Sort Order	Loc	0100 TE_German_LSI	External Key	Sort Order	Loc	0101 TE_English_LSI
9001	10002_446_2			Break (BASE)				Pausen				Break
9000	10000_489_1			Customer Presentation (BASE)				Kundenvortrag				Customer Presentation
9000	10000_489_2			Demonstration (BASE)				Vorführung				Demonstration
9000	10000_489_3			Introduction (BASE)				Einleitung				Introduction
9001	10002_446_4			Medical Lecture (BASE)				Fachvorträge				Medical Lecture
9001	10002_446_3			Product Lecture (BASE)				Produktvorträge				Product Lecture
9000	10000_489_4			Product Presentation (BASE)				Produktpräsentation				Product Presentation
9001	10002_446_1			Social Program (BASE)				Rahmenprogramm				Social Program
9000	10000_489_5			Workshop (BASE)				Workshop				Workshop

490 Equipment

Catalog

Equipment (Equipment) [447]

Records 14

Tenant	External Key	Sort Order	Loc	0001 TE_BASE	External Key	Sort Order	Loc	0100 TE_German_LSI	External Key	Sort Order	Loc	0101 TE_English_LSI
9000	10000_490_10			Brochures (BASE)				Kataloge				Brochures
9000	10000_490_9			Catering (BASE)				Catering				Catering
9000	10000_490_1			Extra Seats (BASE)				Extra Bestuhlung				Extra Seats
9000	10000_490_2			Flip Chart (BASE)				Flipchart				Flip Chart
9000	10000_490_4			Laptop / PC (BASE)				Notebook / PC				Laptop / PC
9000	10000_490_3			Lunch (BASE)				Mittagessen				Lunch
9000	10000_490_11			Microphone (BASE)				Mikrofon				Microphone
9000	10000_490_8			Name Badges (BASE)				Namenskarten				Name Badges
9000	10000_490_12			Notepad (BASE)				Notizblock				Notepad
9000	10000_490_13			Pens / Pencils (BASE)				Stifte / Bleistifte				Pens / Pencils
9000	10000_490_5			Projector (BASE)				Beamer				Projector
9000	10000_490_6			Seating (BASE)				Bestuhlung				Seating
9000	10000_490_14			TV Screen (BASE)				TV-Bildschirm				TV Screen
9000	10000_490_7			Whiteboard (BASE)				Whiteboard				Whiteboard

designer Configuration

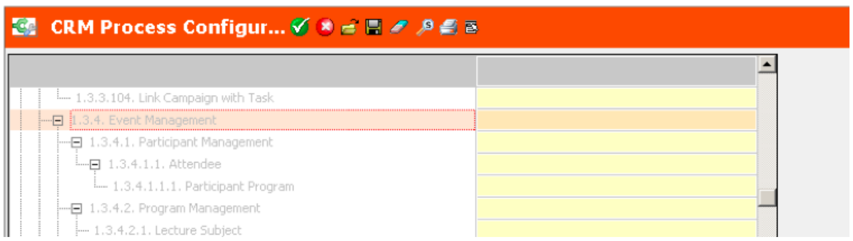
Learn about the basic designer configuration for event management.

- Tree View FI

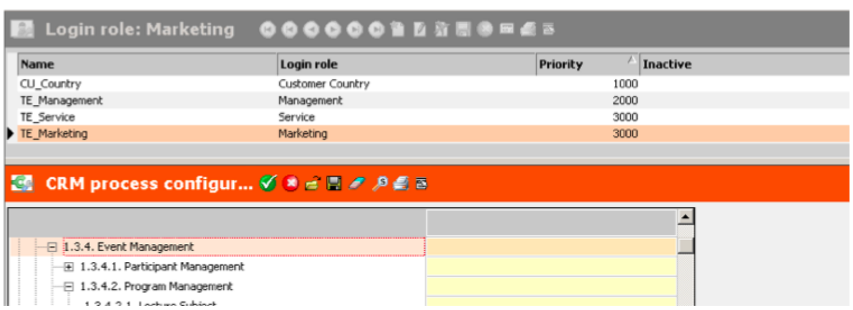
  The following elements were included into the FI tree view.

  - The Attendee (V1) node and the Lecture/Speaker (V3) should only be visible if the role of the current user has access to the CRM process “1.3.4. Event Management”

    - The standard CRM process configuration has denied the access to this CRM process:



    - The login role Marketing has access to this CRM process:



- Search&List and Field Group CORE_V3_KP

Defined elements: Details, List and Search. Used in the FI tree view for the lecture subjects node (V3)

- Field Group CORE_V3_V2

Defined elements: List and MiniDetails. Used in the ExpandChildren-Header of Header Group V2 – in order to display the speakers (V3) below the lecture subject mask (V2).

- Field Group CORE_V4_V2

Defined elements: List and MiniDetails. Used in the ExpandChildren-Header of Header Group V2 – in order to display the agenda items (V4) below the lecture subject mask (V2).

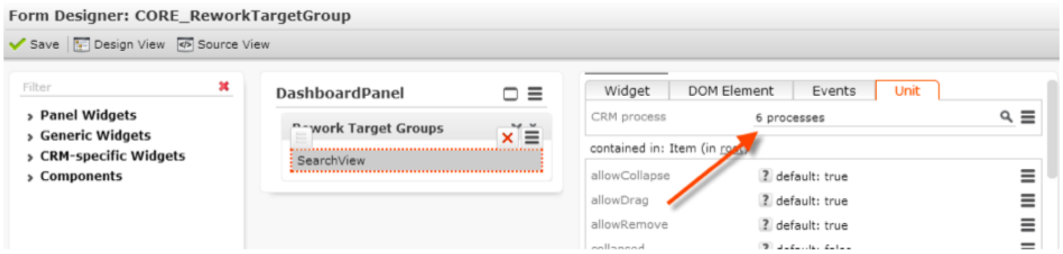
- Button CORE_V5_NewFromV1
- Button CORE_V5_NewFromV4

Some more designer configurations

- **SearchResults-Header of Header Group AG**

  Form CORE_ReworkTargetGroup

  The form is assigned to the following processes:



  If the role of a user (group) has a right to access this process, the form is displayed (e.g. on the Start Page of the user).

- **Filter AK.CORE_OpenInvitationWithMyAG**

  This filter is used to display just the relevant marketing activity (AK) records e.g. on the start page of a sales user.

  - Search&List CORE_AK_ReworkAG
  - Filed Group CORE_AK_ReworkAG
  - List CORE_AK_ReworkAG
  - Filter AG.CORE_My
  - Button CORE_AG_SetInactive

- **CRM Processes**

  In order to display the elements that are assigned to the Processes under “Target Group Management (1.3.2.2.)” for the Sales users, the CRM process configuration was changed accordingly.

  This should display the Form “Form Designer: CORE_ReworkTargetGroup” on the start page of a sales user.

- **Rights**

  In order to enable the sales user to add or edit (set the flag “Inactive”) target group records the right “TE_RR_Sales” was changed accordingly.

Marketing & Follow-Up Objectives

- TE_AF_AnswerLabel

o Used as a label in Search & Results header of Marketing Objectives (AF)

- TE_AF_SetAnswerToYes

o Calls the trigger “TE_AF_UPD_SetAnswerToYes” o Uid = Record

- TE_AF_SetAnswerToNo

o Calls the trigger “TE_AF_UPD_SetAnswerToNo”

o Uid = Record

- TE_AF_NewFollowUp

o New Record button adapted to open specific expand view used in Follow-Up Objectives header

o expandName = TE_AF_FollowUpMA

Filters

Filters „Own“ and „FollowUp“ are applied in a background of form to filter out records specific for either Marketing Objectives (filter „Own“) or Follow-Up Objectives (filter „FollowUp“) as those are based on the same info area AF.

- AF.Own
- AF.FollowUp
- AF.Persons
- AF.Accounts

Forms

- TE_AF_MarketingActivities

Consists of two SearchView wigdets based on the same info area AF but showing different Search&List Configurations. Marketing Objectives part was build on default AF configuration and Follow-Up Objectives uses TE_AF_FollowUpMA.

Triggers

Used to set field “Completed” (AF/B15) to true, “Completed on” (AF/D16) to current date, “Completed by” (AF/L17) to current user and respectively to chosen answer - field “Answer” (AF/X5006).

- TE_AF_UPD_SetAnswerToYes
- TE_AF_UPD_SetAnswerToNo

Sales

Learn how to manage inventory, order and over the counter sales.

Inventory Management (CRM # 70004000)

Learn to manage stocks.

Stock

Overview

Stock is read-only and shows only the items of the currently logged in rep and reps hierarchically below the current rep (done with the hierarchy code defined in the Rights module).

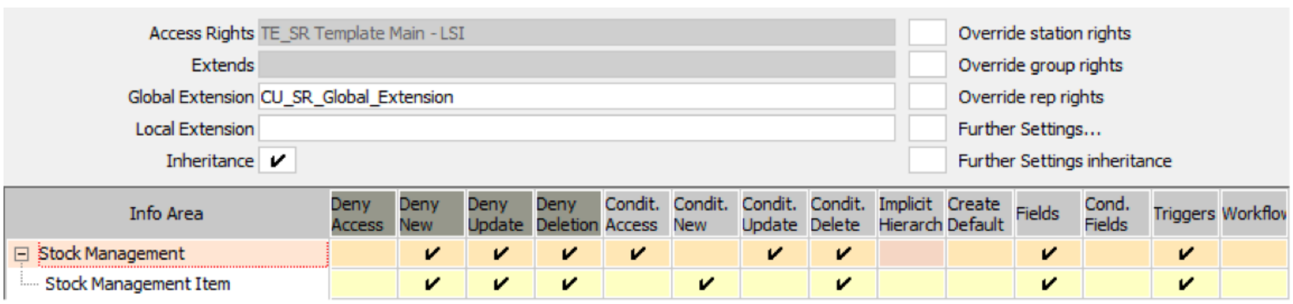
Stock Inventory

Overview

Stock Inventory is used for recording the rep's current (counted by hand) stock and comparing that with the stock values provided in the BS (Stock) info area, approving the values by the rep's superior and completing the process by the backoffice person that is assigned to the rep. After the inventory is completed the differences are added/subtracted from the current BS (Stock) quantity and the originally created BV (Stock Inventory) gets flagged as 'booked'.

The SearchAndList has a global filter named 'BV.TypeInventory' which limits the visible records to 'Stock management type'= 'Inventory' and 'Quantity factor' = '0' is filtered. Additionally there are 3 filter buttons in the header which use the following filters: BV.StatusRunning, BV.StatusSubmitted, BV.StatusCompleted.

Rights



Access Rights: TE_SR Template Main - LSI
Extends:
Global Extension: CU_SR_Global_Extension
Local Extension:
Inheritance: ✔

Override station rights
Override group rights
Override rep rights
Further Settings...
Further Settings inheritance

Info Area	Deny Access	Deny New	Deny Update	Deny Deletion	Condit. Access	Condit. New	Condit. Update	Condit. Delete	Implicit Hierarch	Create Default	Fields	Cond. Fields	Triggers	Workflow
Stock Management		✔	✔	✔	✔		✔	✔			✔		✔	
Stock Management Item		✔	✔	✔		✔		✔			✔		✔	

Access to BV (Stock Management) and BP (Stock Management Item) records are granted if the record is assigned to the currently logged in rep, someone higher in the rep's hierarchy code or the assigned backoffice person for this rep.

Depending on the status of the BV record different users may edit the linked BP records. The rep of the record may edit his BP records in the 'open' or 'declined' states. In 'submitted' status the superior of the rep may edit the BP records. After the superior approved the BV record the rep's assigned backoffice user may edit the BP records.

Most of these rights are configured in 'TE_SR Template Main – LSI'. Some of them additionally in 'TE_RR Backoffice - LSI', 'TE_RR Management - LSI' and 'TE_RR Sales OTC - LSI'.

Additionally there are 2 new triggers set in the main right which update entered counting differences in BP (the actual difference between the rep's entered values and the BS values) and BV (the number of records differing from the original stock item): 'TE_BP_UPD_Difference' and 'TE_BV_UPD_Difference'.

Workflows

There are 2 different workflows in the process of correcting the stock through inventory: TE_BV_BP_ManageStockForCurrentRep:

This workflow is started by clicking the 'New' button in the BV result list. It creates a new BV record, looks up all BS records of the current rep and creates a copy of them as linked BP records to it.

TE_BV_Automatic_Booking_Inventorydifferences:

This workflow is executed (by the backoffice rep clicking on ‘Complete’) after the rep has counted his/her stock items and the differences between these values and the respective BS records are calculated, approved by his superior and booked by his backoffice rep.

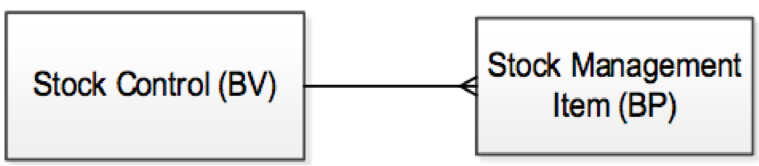
The workflow creates a second BV record with the same linked BP records as the original and sets the ‘Booked’ field to “True” in both BV records. With the difference that the ‘Quantity factor’ field is set to ‘+Qty’ (which is shown nowhere on the interface but used by the business logic). The business logic then corrects the BS records accordingly.

Stock Transaction

Overview

Note: The same BV info area was used for Stock Transaction and Stock Inventory.

Data model



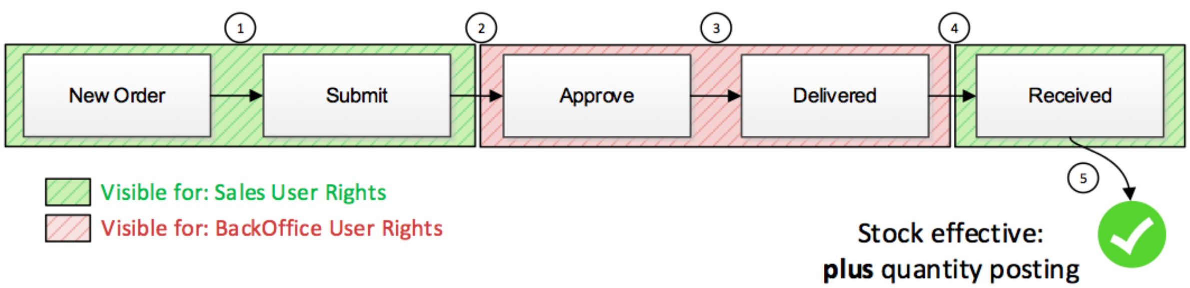
Callable from

- Menu Sales -> Stock Transaction
- Sales start page, backoffice start page, management start page

Processes

New Order process

The following picture shows the “New order” process. White boxes display buttons in web.

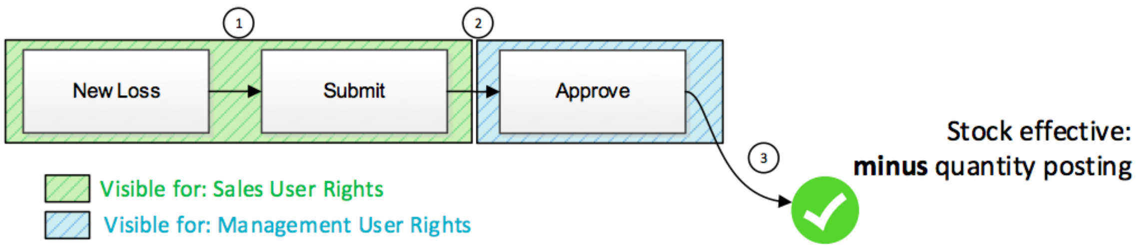


BV Status symbol	BV Status	Status changed by button
1	Open	
2	To be verified	Submit
3	Transferred	Approve

BV Status symbol	BV Status	Status changed by button
4	Delivered	Delivered
5	Completed	Received

New Loss process

The following picture shows the “New loss” process. White boxes display buttons in web.



BV Status symbol	BV Status	Status changed by button
1	Open	
2	To be verified	Submit
3	Completed	Approve

New Theft process

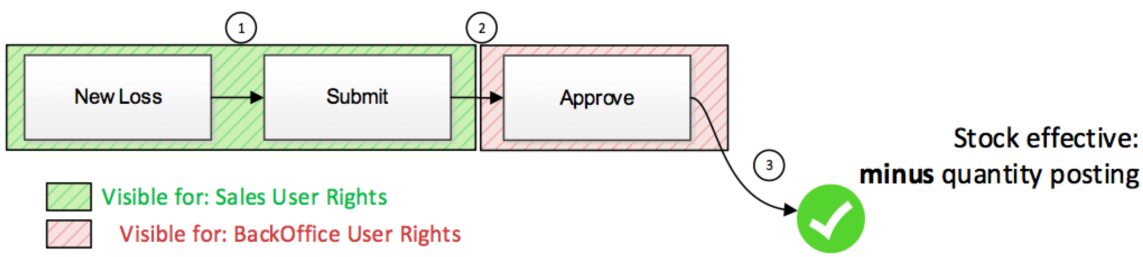
The following picture shows the “New theft” process. White boxes display buttons in web.

Dito.

BV Status symbol	BV Status	Status changed by button
1	Open	
2	To be verified	Submit
3	Completed	Approve

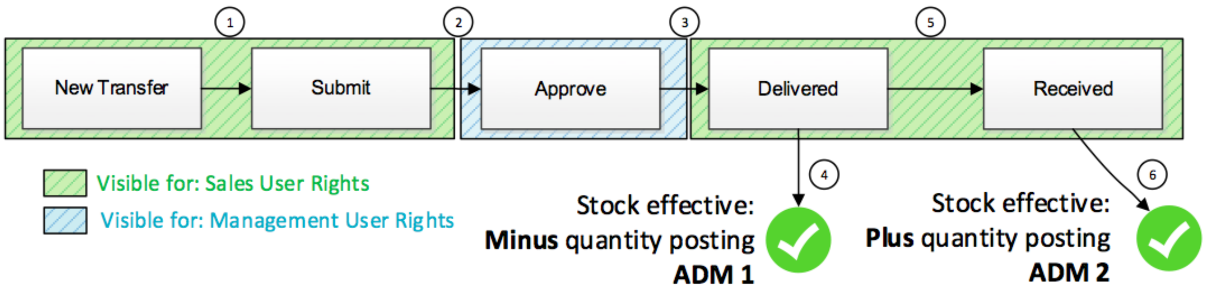
New Return process

The following picture shows the “New Return” process. White boxes display buttons in web.



BV Status symbol	BV Status	Status changed by button
1	Open	
2	To be verified	Submit
3	Completed	Approve

New Transfer process



BV Status symbol	BV Status	Status changed by button
1	Open	
2	To be verified	Submit
3	Transferred	Approve
4	Completed	Delivered
5	Delivered	Delivered
6	Completed	Received

CRM Processes

Basically there are three different CRM processes which are blocked in thegGlobal CRM process configuration and unlocked in the different roles.

- Stock Inventory Sales (1.2.6.8.1.400)
- Stock Inventory BackOffice (1.2.6.8.1.401)
- Stock Inventory Management (1.2.6.8.1.402)

User rights / CRM process	Stock Inventory Sales	Stock Inventory BackOffice	Stock Inventory Management
TE_Manage-ment_LSI	Locked	Locked	Unlocked
TE_Manage-ment_CG	Locked	Locked	Unlocked
TE_Sales_OTC_LSI	Unlocked	Locked	Locked
TE_Sales_RX_LSI	Unlocked	Locked	Locked
TE_Sales_CG	Unlocked	Locked	Locked
TE_Backoffice_LSI	Locked	Unlocked	Locked
TE_Backoffice_CG	Locked	Unlocked	Locked
TE_KeyAccount_LSI	Unlocked	Locked	Locked
TE_KeyAccount_CG	Unlocked	Locked	Locked

This table shows which user rights have access to which CRM processes (mainly important for the visibility of used buttons).

Buttons

TE_BV_NewOrder

This button calls the TE_BV_New process.

CRM process: Stock Inventory Sales (1.2.6.8.1.400)

Note: Due to the given CRM process the button is only visible for sales TR, OTC or CG users.

Note: To change this visibility you have to change the CRM process status in your specific CRM process configuration within the role.

Argument	Description	Template default value
BVQuantityFac-tor	The catalog value id from fix. Catalog (Quantity factor, cat.id = 2) Value 2 means the “+ Quantity” value	2
BVType	The catalog value id from fix. Catalog (Stock transaction type, cat.id = 113) Value 1 means the “Order (10002_113_1)” value	1
createNewTab	Opens process in new tab.	true

TE_BV_NewReshipment

This button calls the **TE_BV_NewReshipment** process.

CRM process: Stock Inventory Sales (1.2.6.8.1.400)

Note: Due to the given CRM process the button is only visible for sales TR, OTC or CG users.

Note: To change this visibility you have to change the CRM process status in your specific CRM process configuration within the role.

Argument	Description	Template default value
BVQuantityFactor	The catalog value id from fix. Catalog (Quantity factor, cat.id = 2) Value 3 means the value "-Menge"	3
BVType	The catalog value id from fix. Catalog (Stock transaction type, cat.id = 113) Value 4 means the value "Reshipment (10002_113_4)"	4
createNewTab	Opens process in new tab.	true

TE_BV_NewLoss

This button calls the process **TE_BV_NewLoss**.

CRM process: Stock Inventory Sales (1.2.6.8.1.400)

Note: Due to the given CRM process the button is only visible for sales TR, OTC or CG users.

Note: To change this visibility you have to change the CRM process status in your specific CRM process configuration within the role.

Argument	Description	Template default value
BVQuantityFactor	The catalog value id from fix. Catalog (Quantity factor, cat.id = 2) Value 3 means the “-Quantity” value	3
BVType	The catalog value id from fix. Catalog (Stock transaction type, cat.id = 113) Value 2 means the value “Loss notification (10002_113_2)”	2
createNewTab	Opens process in new tab.	true

TE_BV_NewTheft

This button calls the **TE_BV_NewTheft** process.

CRM process: Stock Inventory Sales (1.2.6.8.1.400)

Note: Due to the given CRM process the button is only visible for sales TR, OTC or CG users.

Note: To change this visibility you have to change the CRM process status in your specific CRM process configuration within the role.

Argument	Description	Template default value
BVQuantityFactor	The catalog value id from fix. Catalog (Quantity factor, cat.id = 2) Value 3 means the value “-Menge”	3
BVType	The catalog value id from fix. Catalog (Stock transaction type, cat.id = 113) Value 3 means the value “Theft notification (10002_113_3)”	3
createNewTab	Opens process in new tab.	true

TE_BV_NewTransfer

This button calls the **TE_BV_NewTransfer** process.

CRM process: Stock Inventory Sales (1.2.6.8.1.400)

Note: Due to the given CRM process the button is only visible for sales TR, OTC or CG users.

Note: To change this visibility you have to change the CRM process status in your specific CRM process configuration within the role.

Argument	Description	Template default value
BVQuantityFactor	The catalog value id from fix. Catalog (Quantity factor, cat.id = 2) Value 3 means the "-Quantity" value	3
BVType	The catalog value id from fix. Catalog (Stock transaction type, cat.id = 113) Value 5 means the "Transfer (10002_113_5)" value	5
Transfer	This value is for dispatching between the "selected rep" step and the "serial entry" step.	true
createNewTab	Opens process in new tab.	true

TE_BV_Submit

This button calls the **TE_BV_UPD_SubmitInventoryVerify** trigger.

CRM process: Stock Inventory Sales (1.2.6.8.1.400)

Attention: This button is hidden in designer. It is displayed depending on the status.

Note: Due to the given CRM process the button is only visible for sales TR, OTC or CG users.

Note: To change this visibility you have to change the CRM process status in your specific CRM process configuration within the role.

This button is only unlocked for sales reps because a user with management or backoffice role does not have the possibility to create new BV records. Therefore this button is not needed for these user roles.

Argument	Description	Template default value
uid	The uid from the selected BV record from the result list.	Record

TE_BV_Approve

This button calls the **TE_BV_UPD_SubmitInventoryChecking** trigger.

CRM process: Stock Inventory BackOffice (1.2.6.8.1.400), Stock Inventory Management (1.2.6.8.1.402)

Attention: This button is hidden in designer. It is displayed depending on the status.

Note: Due to the given CRM process the button is only visible for sales TR, OTC or CG users.

Note: To change this visibility you have to change the CRM process status in your specific CRM process configuration within the role.

This button is unlocked for backoffice and management reps because a user with sales role should have no possibility to approve a BV record. Therefore this button is not needed for sales user roles.

Argument	Description	Template default value
No further default values!		

TE_BV_Decline

This button calls the **TE_BV_UPD_DeclineInventory** trigger.

CRM process: Stock Inventory BackOffice (1.2.6.8.1.400), Stock Inventory Management (1.2.6.8.1.402)

Attention: This button is hidden in designer. It is displayed depending on the status.

Note: Due to the given CRM process the button is only visible for sales TR, OTC or CG users.

Note: To change this visibility you have to change the CRM process status in your specific CRM process configuration within the role.

This button is unlocked for BackOffice and Management reps because a user with sales role should have no possibility to decline a BV record. Therefore there is no use of this button for sales userroles.

Argument	Description	Template default value
No further default values!		

TE_BV_Delivered

This button calls the workflow **TE_BV_TriggerHandler**.

CRM process: Stock Inventory BackOffice (1.2.6.8.1.400), Stock Inventory Sales (1.2.6.8.1.402)

Attention: This button is hidden in designer. It is displayed depending on the status.

Note: Due to the given CRM process the button is only visible for sales TR, OTC or CG users.

Note: To change this visibility you have to change the CRM process status in your specific CRM process configuration within the role.

This button is unlocked for BackOffice and Sales reps because a user with management role should have no possibility to click the deliver button on BV record. Therefore this button is not used for management user roles.

Argument	Description	Template default value
uid	The uid from the selected BV record from the result list.	Record

TE_BV_Received

This button calls the **TE_BV_UPD_CompleteInventory** trigger.

CRM process: Stock Inventory BackOffice (1.2.6.8.1.400), Stock Inventory Sales (1.2.6.8.1.402)

Attention: This button is hidden in designer. It is displayed depending on the status.

Note: Due to the given CRM process the button is only visible for sales TR, OTC or CG users.

To change this vi sibility you have to change the CRM process status in your specific CRM process configuration within the role.This button is unlocked for backoffice and sales reps because a user with management role should not be able to click the “Complete” button in the BV record. Therefore this button is not used for management user roles.

Argument	Description	Template default value
uid	The uid from the selected BV record from the result list.	Record

Visibility Overview

Button Name / User Role	Sales roles	Management roles	Back office roles
TE_BV_NewOrder	Visible	Invisible	Invisible
TE_BV_NewLoss	Visible	Invisible	Invisible
TE_BV_NewTheft	Visible	Invisible	Invisible
TE_BV_NewTransfer	Visible	Invisible	Invisible
TE_BV_NewReshipment	Visible	Invisible	Invisible
TE_BV_Submit	Visible	Invisible	Invisible
TE_BV_Approve	Invisible	Visible	Visible
TE_BV_Decilne	Invisible	Visible	Visible
TE_BV_Delivered	Visible	Invisible	Visible
TE_BV_Received	Visible	Invisible	Visible

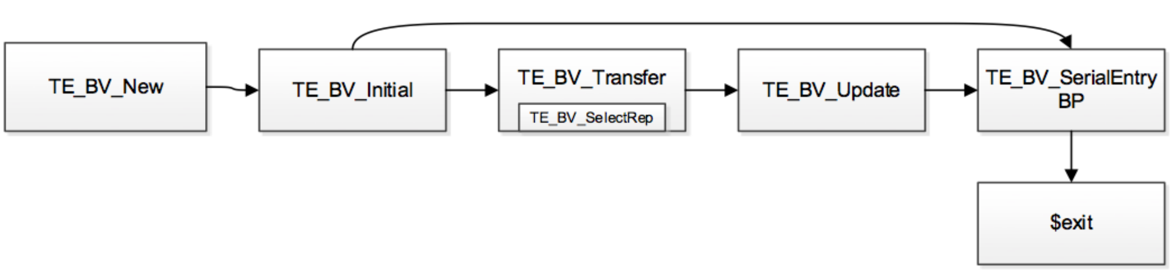
Table 4: This table shows which user role has access to which buttons.

Process

TE_BV_New

This process is responsible for adding new BV records and create linked BP records via the serial entry.

Graph



Process Storage Variables

Name	Description	Value
BVtype		$.get("BVType")
BVQuantityFactor		$.get("BVQuantityFactor")
Transfer		$.get("Transfer")

Step - TE_BV_Initial

This step creates a new BV record with some default values. Therefore we used the crud service (u8.services.crud.create).

Action Template: JavaScriptWithCallback

Input Arguments

Name	Value	Description
$function	u8.services.crud.create({ info areaId: "BV", fields: [{ field: 5013, value: u8.services.catalogs.externalKeyToCode(5013, "10002_5073_2")},{ field: 9, value: BVtype},{ field: 10, value: BVQuantityFactor}]}, $callback)	Create a new BV record via the crud service. Fields 5013, 9, 10 is prefilled with values from the process storage.
BVQuantityFactor	$.get("BVQuantityFactor")	Get the BV quantity factor from the process storage. Passed via the new buttons to the process.
BVtype	$.get("BVtype")	Get the BV type from the process storage. Passed to the process using the new buttons.

Output Arguments

Name	Next Step	Description
curBVuid	$.get("businessObject").uid	Write the uid of the created BV record to the process storage to use it afterwards.

Dispatching

Condition	Next Step	Description
$.get("Transfer")=="true"	TE_BV_Transfer	If the “Transfer” variable from the process is evaluated as “true”, then the next step is TE_BV_Transfer.
True	TE_BV_SerialEntryBP	Otherwise the process dispatchs to the TE_BV_SerialEntryBP step in every other case.

Step - TE_BV_Transfer

This step is responsible for selecting a rep if the transaction type is "Transfer". It is a sub-step between the initial step and the serial entry. After selecting the rep the uid is passed to the “TE_BV_Update” step which updates the BV record which was created in the “TE_BV_Initial” step. The selected rep uid is entered in the “Transfer to (Z/51) field.

Action Template: ExecuteSelectRecordSubStep

Input Arguments

Name	Value	Description
Name	TE_BV_SelectRep	

Output Arguments

Name	Value	Description
repUid	uid	

Dispatching

Condition	Next Step	Description
True	TE_BV_Update	

Step - TE_BV_SelectRep

Action Template: Search

Input Arguments

Name	Value	Description
searchAndListName	ID	
selectionMode	single	
autoSearch	true	

Output Arguments

Name	Value	Description
This step has no output arguments.		

Dispatching

Condition	Next Step	Description
$.get('command')=='Select'	$return	Returns to the “TE_BV_Transfer” step with the “uid = $.get('uid')” argument.

Step - TE_BV_Update

This step has two tasks. First of all there is a data provider which reads the repID from the selected rep in the “TE_BV_SelectRep” step. Afterwards there is the crud service to update the created BV record in the “TE_BV_Initial” step with the repID.

<u>Action Template:</u> JavaScriptWithCallback

Data provider: **GetRepID**

Action: ReadRecordDataProvider

Name	Value	Description
Uid	$.get("repUid")	Pass the selected rep uid from the “TE_BV_SelectRep” step to the data provider.
Fields	0	Read the field 0 from the uid passed to the provider. (RepId, 0/L).

Input Arguments

Name	Value	Description
$function	u8.services.crud.update({ uid: BVuid, fields: [{ field: 46, value: repID}] }, $callback);	Update the BV record which was created in the “TE_BV_Initial” step with the value from the GetRepID data provider. The “Transfer to” field is filled with the uid from the rep selected in the search in the “TE_BV_SelectRep” step
BVuid	$.get("curBVuid")	Get the current BV uid, which was created in the “TE_BV_Initial” step.
repID	$.get(0)	Get the value from the data provider from field 0 for the passed rep uid.

Output Arguments

Name	Value	Description
This step has no output arguments.		

Dispatching

Condition	Next Step	Description
True	TE_BV_SerialEntryBP	

Step - TE_BV_SerialEntryBP

This step is the last step in the process. If the user clicks on the “I’m done” button in the serial entry the process is closed and dispatched back to the BV main search. Basically this step is responsible for creating BP records in with the standard serial entry. No special filters are provided.

Action Template: Serial Entry

Input Arguments

Name	Value	Description
Name	BV(AR=>BP)	
Uid	$.get('curBVuid')	
optionsFormName	SerialEntry.Default.Options	
copySourceFields	ItemNo,ItemName,6,7	
copyTargetFields	3,4,6,7	
searchFieldGroupName	AR	
totalsFormName	TE_BV_SerialEntry_Totals	

Output Arguments

Name	Value	Description
This step has no output arguments.		

Dispatching

Condition	Next Step	Description
True	$exit	

Filters

- BV.TypeTransaction
- BV.TypeTransactionAndOpen
- BV.TypeTransactionAndOpenDelivered
- BV.TypeTransactionAndVerifying
- BV.TypeTransactionCanceledOpenAndDelivered

Forms

TE_BV_StockTrasaction

This form includes only one search view. Due to that the system has to react to ‘onSelect’ and ‘inSelectionChange’ events and some special configuration values and a separate form is needed.

Parameter	Value	Description
Name	TE_BV_Transaction	The name of the Search&List designer configuration.
fixedFilterName	BV.TypeTransaction	The name of the fixed filter behind the search. For Filter details see section Filters!
pageSize	10	Number of rows to display.
showFilters	False	Filters in the user interface is not displayed! Instead of additional filters there are filter buttons in the search header! For filter details, see section **Filters** below.
useAtuoSearch	True	The search automatically loads the list.
headerGroupName	TE_BV_Transaction	The name of the header group. For details see section Config. Overview!
headerName	Search	The name of the header. For details see section Config. Overview!
fieldGroupName	TE_BV_Transaction	The field group name! For details see section Config. Overview!
SelectionMode	Single	Only one record can be selected.
viewOptions>list>grid>autoSelect	False	If the search appears for the first time, no record is selected. This function is used because if there is no BV record in the list there could be a javaScript error when the script tries to read a record although there is no record in the list.
viewOptions>list>autoLoad	True	The list automatically starts to load data.

Events & JavaScript Calls

There is the same JavaScript Code used behind the ‘onSelect’ and ‘obSelection-Change’ events! For detailed information see section **JavaScript function** below.

• TE_BV_SerialEntry_Totals

Web Config Parameter

In order to keep everything customizable, there are 6 web config parameters where values can be defined!

Parameter	Value	Description
TE_StockTransaction_readField	5000	The field which uses the catalog for matching of status and button visibility.
TE_StockTransaction_readCatalog	5039	Which catalog is used for matching of status and button visibility.
TE_StockTransaction_StatusMapping	"10002_5039_1": "TE_BV_Submit"; "10002_5039_2": "TE_BV_Delivered d";"10002_5039_4": "TE_BV_Submi t";"10002_5039_5": "TE_BV_Receive ed";"10002_5039_6": "TE_BV_Approve,TE_BV_Decline"	This variable is responsible for handling the visibility of the buttons depending on status (value from field 5000, var.catalog 5039) of the selected BV record in list. It is an array of the external key (from catalog value) and button name (in the designer configuration). For example the first entry in the array means that the TE_BV_Submit button is displayed if the value of the selected BV record of the “Status” field is “Open”.
TE_StockTransaction_exeptButton	TE_BV_Delivered	The button which should not be displayed although all other limitations (CRM processes, rights, status values) would display the button. **Important:** This restriction refers only to currently logged in users
TE_StockTransaction _exeptStatus	2	The status value of the Status (BV) field. This means that if a record matches the given status value then the button in the “TE_StockTransaction_exeptButton” web config parameter is not displayed for the currently logged in user!

Parameter	Value	Description
TE_StockTransaction_exeptType	1	The type value of the “Stock Transaction type (BV)” field. This means that if a record matches the given type value the button in the “TE_StockTransaction_exeptButton” web config parameter is not displayed for the currently logged in user!

Note: The “TE_StockTransaction_exeptType”, “TE_StockTransaction_exeptStatus” and “TE_StockTransaction_exeptButton” web config parameters have to be used in combination. Only if both “..exeptType” and “…exeptStatus” are filled then the button defined as “…exeptButton” is not displayed! This setting applies to the currently logged in user in every case. This is if the currently logged in user should have permissions to see the button, but the button is defined as exception. The button is only invisible for the currently logged on user!

Status Mapping Button

Buttons to display	External key	Catalog Value
TE_BV_Submit	10002_5039_1	Open
TE_BV_Delivered	10002_5039_2	Submitted
TE_BV_Submit	10002_5039_4	Declined
TE_BV_Received	10002_5039_5	Approved
TE_BV_Approve, TE_BV_Decline	10002_5039_6	Verifying

Table 5: This table shows the mapping between the BV status and the button visibility.

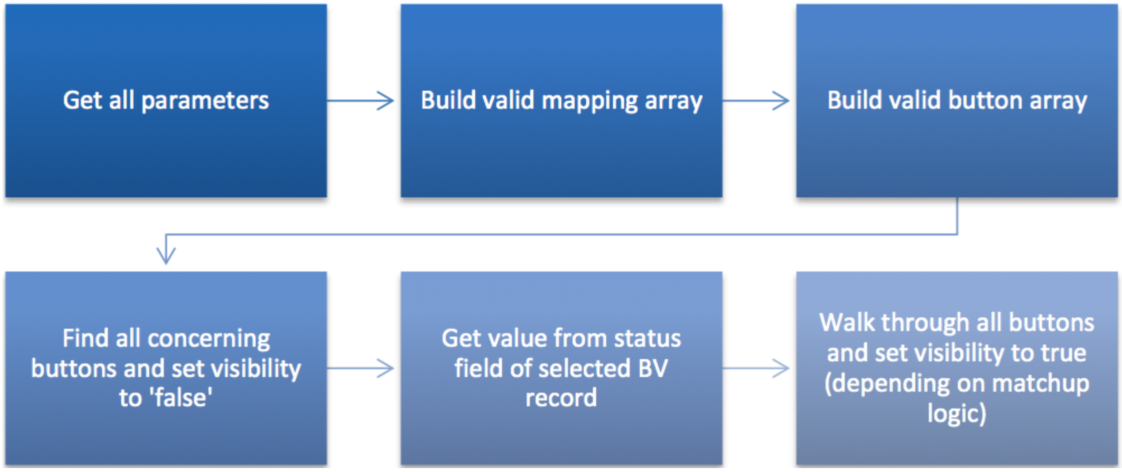
Note: The “Completed” (10002_5039_3) catalog value is not needed in mapping the because if a BV record has the status “Completed” then no further buttons should be displayed in the user interface.

JavaScript Functions

A new JavaScript function was created for stock transaction:

checkBVpermission_onRecordSelect(); (File lsiquerystates.js)

Basically the function consists of 6 main blocks:



For detailed information please take a look at the file and comments within it.

Triggers

Overview

Trigger/WF	Executed by button	BV Status
TE_BV_UPD_SubmitInventoryVerify	TE_BV_Submit	“to be verified”
TE_BV_UPD_SubmitInventoryChecking	TE_BV_Approve	„Submitted“ / „Completed“
TE_BV_UPD_DeclineInventory	TE_BV_Decline	“Canceled”
TE_BV_TriggerHandler	TE_BV_Delivered	„Completed“ / „Delivered“ (Special Case)
TE_BV_UPD_CompleteInventory	TE_BV_Received	“Completed”

• TE_BV_UPD_SubmitInventoryVerify

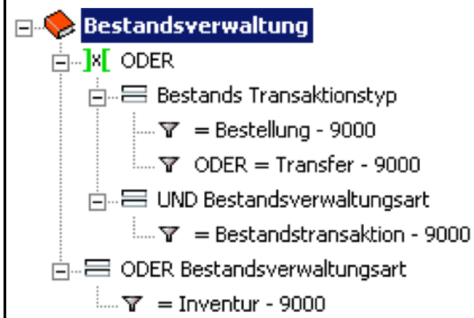
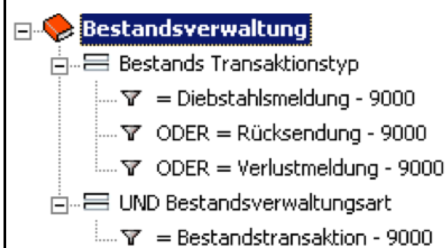
Executed by: Button - **TE_BV_Submit**

	Field	Field content	Condition
1	Submitted at (5002/T)	Actual Time	
2	Status (5000/K)	“to be verified”	
3	Countingcompleted on (5008/D)	Actual Date	

This trigger is executed by the “TE_BV_Submit” button and the status set to “to be verified” if the user clicks the button.

• TE_BV_UPD_SubmitInventoryChecking

Executed by: Button - **TE_BV_Approve**

	Field	Field content	Condition
1	Submitted at (5002/T)	Actual Time	
2	Status (5000/K)	“Submitted”	
3	Status (5000/K)	“Completed”	
4	Countingcomplet-ed on (5008/D)	Actual Date	

This trigger is executed by the “TE_BV_Approve” button. As this button is available for backoffice and Management users and act in two different ways at the same time, there are conditions if the “Status” field is filled or not.

- TE_BV_UPD_DeclineInventory

Executed by: Button - **TE_BV_Decline**

	Field	Field content	Condition
2	Status (5000/K)	“Canceled”	
3	Inventory declined on (5015/D)	Actual Date	

- TE_BV_UPD_CompleteInventory Executed by: Button - **TE_BV_Received**

  Executed by: Workflow - **TE_BV_ CopyRecordToTransferRep** – In process no. 5

	Field	Field content	Condition
2	Status (5000/K)	“Completed”	
3	Inventorycompleted on (5010/D)	Actual Date	

- TE_BP_UPD_SetInventoryEntered

  Executed by: Workflow - **TE_BV_CopyRecordToTransferRep** – In process no. 4

  Executed in: Right - **TE_SR Template Main LSI** - Info area BV

	Field	Field content	Condition
2	Status (5000/K)	“Delivered”	
3	Inventory approved on (5009/D)	Actual Date	

- TE_BV_DV_InventoryChecking

  Executed in: Right - **TE_SR Template Main LSI** - Info area BV [on NEW]

- TE_BV_UPD_InventoryType_Inventory

  Executed in: Right - **TE_SR Template Main LSI** - Info area BV [on NEW]

Workflows

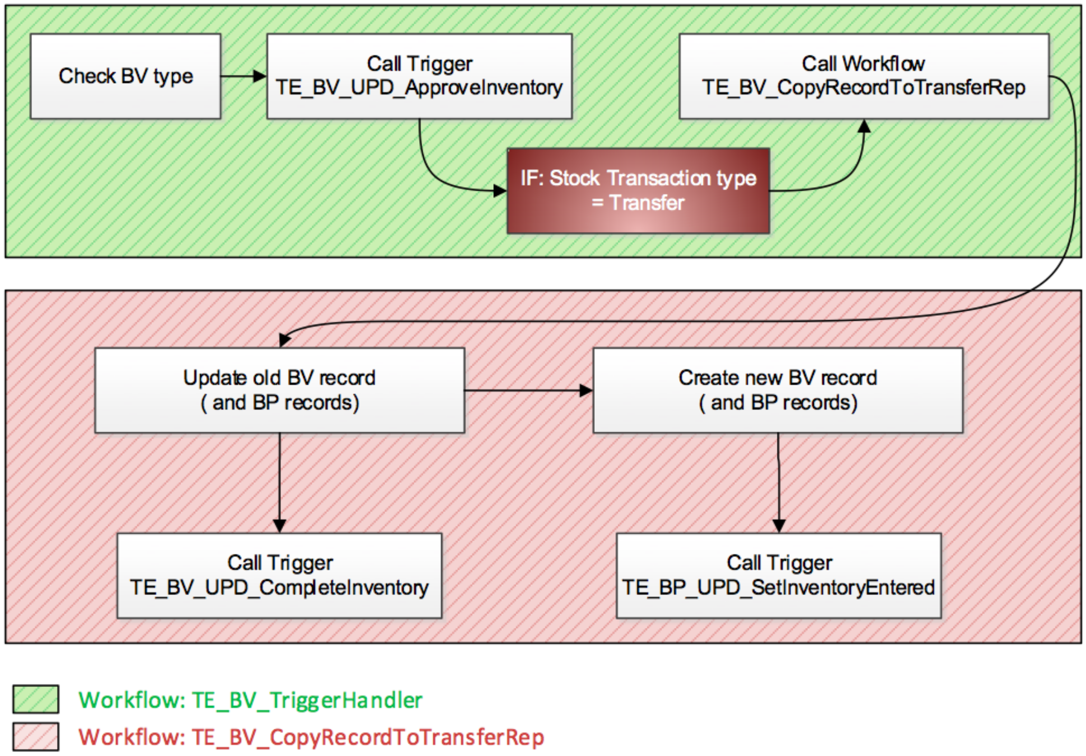
- TE_BV_TriggerHandler

  Executed by: Button - **TE_BV_Delivered**

- TE_BV_CopyRecordToTransferRep

  Executed by: Workflow - **TE_BV_TriggerHandler**

Special Case: “TE_BV_Delivered” Button



Button Visibility

If one of these buttons

- TE_BV_Approve
- TE_BV_Decline
- TE_BV_Delivered
- TE_BV_Received
- TE_BV_Submit

is displayed or not, depends on the following settings:

1. Given CRM process in designer
2. Locked or unlocked CRM prcosses in the user rights
3. The value of the "Status" field (K/5000; catalog 5039); because it is an important factor for the JavaScript function which handles visibility.
4. Mapping in web config parameter.
5. Exception defined in web config parameter.

Territory Management

Buttons

TE_GL_Allocate

Calls JavaScript: u8.TeLSI.Allocate

The function that is called displays first a question mark type message box and after selecting “OK”, a trigger is called ("TE_TD_NEW_Create ToDo for Allocation"). An information type message box is then displayed with information about action taken by the trigger.

Menu Actions

TE_A_FillUpAllocationConfiguration

Used to fill up specialties (generate GL records with different specialties) for the chosen business area and the chosen account type

Callsjavascriptu8.TeLSI.TerritoryMgmt.FillUpAllocationConfigurationwithallocateAll = false.

TE_A_FillUpAllocationConfigurationAll

Used to fill up specialties (generate GL records with different specialties) for all account types and the chosen business area.

Callsjavascriptu8.TeLSI.TerritoryMgmt.FillUpAllocationConfigurationwithallocateAll = true

Filters

• TD.TE_Allocation

Forms

TE_TerritoryManagement

The form consists of 3 tabs:

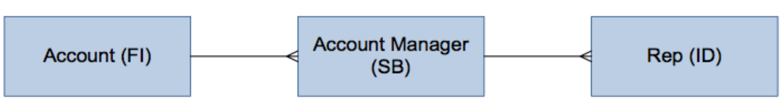
- Allocation (ZU) Search&Result + Expand View
- Allocation Configuration (GL) Search&Result + Expand View
- To-Do (TD) Search&Result

  ToDos are filtered (automatically applied TD.TE_Allocation filter) so that the user can only see records of his interest.

Note: It is not allowed to fill Postal Code AND Micro Brick. The business logic runs if one field is filled! The template contains a hook function which solves this issue. See more details in the “Hook functions” topic.

Account Manager

Overview



Menu Actions

• TE_SB_AccountManager

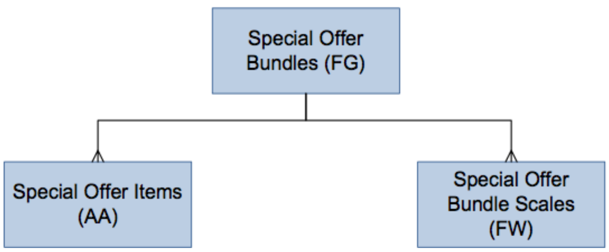
Filters

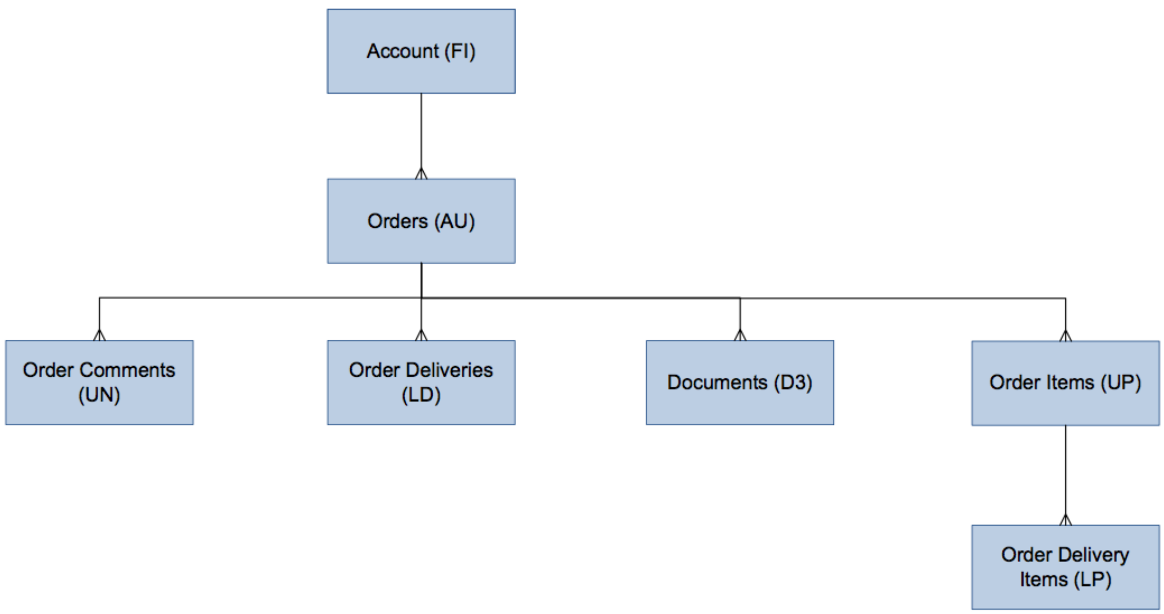
- SB.TE_CompanyRelated
- SB.TE_PersonRelated

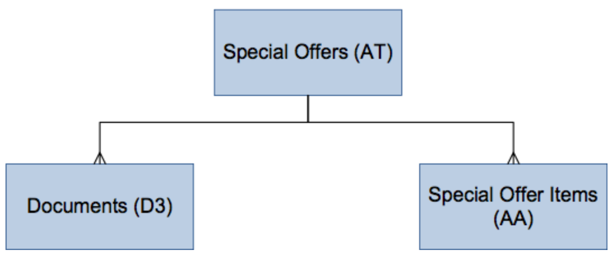
Order Management

Learn how to manage sample orders and sales orders from inventory to delivery.

Overview







Sample Management

The Sample Management consists of two info areas: Samples (MU) and Samples/Year (MJ).

Callable from

- Application menu -> Reference Book > Samples
- Application menu -> Reference Book > Samples/Year
- PE Tree (for person type ‘Doctor’)

Forms

TE_MJ_SamplePerYearSearch

• Application menu > Ref. Book > Samples/Year

TE_MU_SampleSearch

- Application menu > Ref. Book > Samples
- PE Tree > Samples

Call Documentation

The call documentation is a major process in LSI as well as CG. Its goal is to capture all information gathered during a visit at the customer site.

Tip: All designer units for call documentation are named with the prefix “CDoc”. If you are looking for actions, buttons, forms, process steps you can search by string “CDoc”.

The Process “TE_CDoc”

Process Overview Page

All variables for the process are defined in the Process Storage Variables. Dependent on CRM Process: "LSI-1-2-6-4-400-Call Documentation (1.2.6.4.6)" Initial step: TE_CDoc_Initial

Dispatching

- if there is a parentMAUid selected--> go to step 'TE_CDoc_Overview_Initial'
- else --> go to step 'TE_CDoc_Calls_Initial'

TODO: Common definitions for all phases

All phases are built like this: Initial step Execute step

Output arguments of the initial step are always setting the variable “curPhase”.

Entry points for the process

Basically the modular call documentation process can be called from two different entry points.

1. Using the “**TE_CDoc_OpenInProcess**“context menu entry the process gets the Uid of the MA record from which the action is called.
2. Via the “**TE_ID_NET_CDoc**” application menu entry point there is no MA Uid which could be passed to the process.

Case 1: Application menu entry point

In this case, no MA Uid can be passed to the process. The “Process” action in the “TE_ID_NET_CDoc” application menu is defined as follows:

Argument	Description	Template default value
name	The name of the process.	TE_CDoc
CreateNewTab	Execute action in new tab, reuse the tab and don’t re-fresh it with new MA Uid if the user clicks again on the menu entry.	{ "refresh": false, "reuseId": " TE_CDoc " }
CreateNewPopup	Create no new popup (op-tional).	false

Because no further information concerning MA, parent FI or parent PE exists, the “Process” action template can be used and the “TE_CDoc” process is called directly and opened in a new tab (with reuseId for reusing the open tab). All further dispatch-ing steps is handled directly in the process.

If the process is started via the application menu entry, it starts in the “Activity” process phase.

Case 2: Context menu entry point

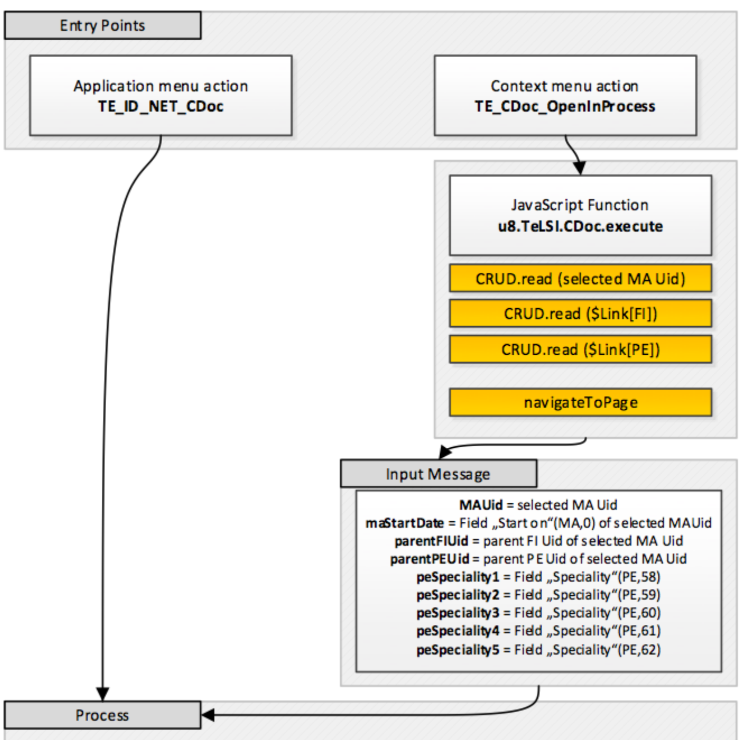
In this case we want to start the process from an MA record. Because we have to use the parent FI Uid or the parent PE Uid in the input message of the process (described below) it is necessary to read the parent records BEFORE starting the process. To achieve this a little JavaScript is used which reads the parent FI Uid and PE uid and passes them to the process (if these parent Uids exist).

The “JavaScript” action in the “TE_CDoc_OpenInProcess” context menu is defined as follows:

Argument	Description	Template default value
$function	Calls the JavaScript function for further steps.	u8.Playground.CDoc.execute
uid	The uid of the selected MA record.	Record
createNewTab	Executes action in new tab, reuses the tab and refreshes it with new MA Uid if you select a new record in listview.	{"refresh": true, "reuseId": "TE_CDoc"}
processName	The name of the process.	TE_CDoc

If the process is started via the application menu entry, it starts in the “Overview” process phase.

The following chart shows the structure and logic after one of the two entry points was selected and before the process is started.



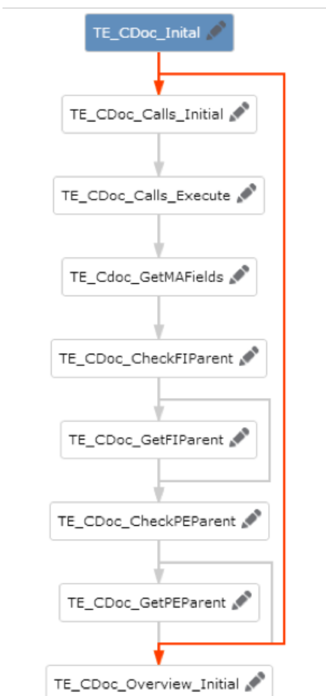
The process is directly called if the user starts the process via the application menu entry. In contrast to that there is an additional JavaScript function if the user selects a MA record and starts the process via the context menu or default action (double-click in the MA list view). Because the process starts directly in the “Overview” phase after using the context menu action entry point, some additional data is necessary which has to be passed to the process. Therefore the u8.TeLSI.CDoc.execute JavaScript function was implemented. All variables which is created in this function is passed to the process and are available within the “Input Message” of the process.

Phase TE_CDoc_Calls (List of MA-records)

The “Activities” phase displays a list of the appointments that have already been documented and those still requiring documentation.

You can create a visit report for those appointments that have been documented.

Double-click on an appointment to open and edit it.



Phase TE_CDoc_Overview (Details of an MA-record)

The Overview Phase consists of 3 process steps. Finally it is displaying the form 'TE_CDoc_Overview'.

Form 'TE_CDoc_Overview'

On top the ExpandView (expandName: TE_MA_CDoc_Overview) of a selected MA-record is displayed via binding: model.uid: $component(url).#parentMAUid.

Note: The user is able to change master data but there is no context menu in this expandView on purpose as we don’t want to allow the user to navigate to somewhere else.

Related Data

It is not possible to create data in the overview phase as there are no “New” buttons offered. If you want to offer buttons just use the same headergroups and headers as in Error! Reference source not found..

Note: The Dashboard Panel’s parameter “hideItemsIfEmpty” is set to true and the ListView’s parameter “hideIfEmpty” is set to true. If a related ListView has no results, it is hidden.

The Related Data are displayed in a Dashboard Panel where the following ListViews are used:

Valid and Open Marketing Objectives

This ListView has a link to the parent FI-record via binding: link: $component(url).#parentFIUid.

By only setting this link we would show all linked AF-records for this FI-record. In our case we only want to

display valid AF-records, so we have to set a filter with a parameter on the start date of the selected MA-

record. This filter has to be applied before loading the form with the ListViews. That’s why have built an

additional process step. Building the correct filterstatement is done in process step

“TE_CDoc_Overview_LoadFilter”. The filter is set via binding: model.dataProvider.reader.arguments.filterStatement: $component(url).#marketingObjectivesStatement

Valid and Open Follow-Up Objectives

This ListView has a link to the parent FI-record via binding: link: $component(url).#parentFIUid.

By only setting this link we would show all linked AF-records for this FI-record. In our case we only want to display valid AF-records, so we have to set a filter with a parameter on the start date of the selected MA- record. This filter has to be applied before loading the form with the ListViews. That’s why have built an additional process step. Building the correct filterstatement is done in process step “TE_CDoc_Overview_LoadFilter”. The filter is set via binding: model.dataProvider.reader.arguments.filterStatement: $component(url).#followUpStatement

My Open Tasks

This ListView displays the fieldGroup TE_A1_CDoc with fixedFilterName: A1.TE_CDoc_MyOpen and a link which is set via binding: link.infoAreaId: FI, link.linkId: 127, link.recordId: $component(url).#parentFIUid.recordId

My Open Tasks for this Activity

This ListView displays the fieldGroup TE_A1_CDoc with fixedFilterName: A1.TE_CDoc_MyOpen and a link which is set via binding: link.infoAreaId: MA, link.linkId: 127, link.recordId: $component(url).#parentMAUid.recordId

Documents

This ListView displays the fieldGroup TE_D3_CDoc and a link which is set via binding: link.infoAreaId: MA, link.linkId: 127, link.recordId: $component(url).#parent-MAUid.recordId

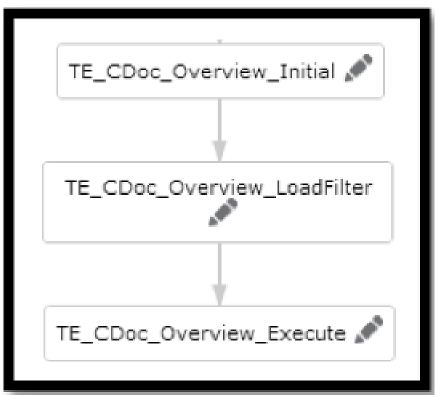
Process Steps

Double clicking a record in the first phase (TE_CDoc_Calls) in either “Undocumented Activities” or “Documented Activities” (Form 'TE_CDoc_Calls_Overview') executes the defaultAction “TE_A_CDoc_Proceed” (which in fact executes a simple ‘Proceed’ command).

This phase is active if the condition $.get("curPhase")=="TE_CDoc_Overview" is met. The variable “curPhase” is set in the output arguments of the initial step. So this phase is clickable if a MA-record is selected.

There are 3 process steps for this phase:

- TE_CDoc_Overview_Initial



o The Initial step for the "Overview" phase. Set the process storage variable "curPhase" to "TE_CDoc_Overview", so that this phase gets active.

o Dispatching to step "TE_CDoc_Overview_LoadFilter"

- TE_CDoc_Overview_LoadFilter

o Calling the action template “JavaScriptWithCallback” with function “u8.TeLSI.CDoc.preShowForm_Overview_Complete”. In the function:

- We are loading 2 fixed filters (AF.TE_CDoc_ValidAFNotLinkedToAK and AF.TE_CDoc_ValidAFLinkedToAK). It is possible to change the filters and to add additional parameters. (The parameters must be named like “$parValue<no>”).
- The filters are loaded from the designer.
- The parameters for those filters are set with the selected MA-record’s field “StartDate”.
- The final filter statement is written back into process storage and passed on to the form.

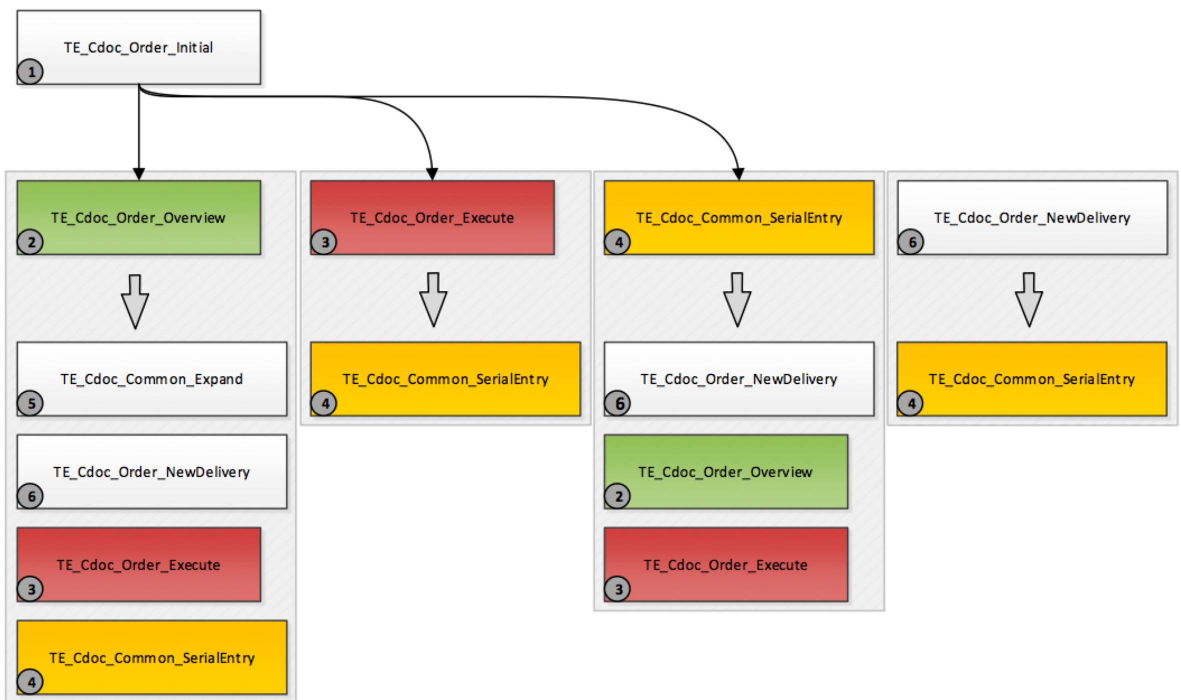
o Dispatching to step "TE_CDoc_Overview_Execute" on callback of the JavaScript function.

- TE_CDoc_Overview_Execute

o Showing Form Form 'TE_CDoc_Overview' and passing arguments (FormName, final filter statements and uids) to the form.

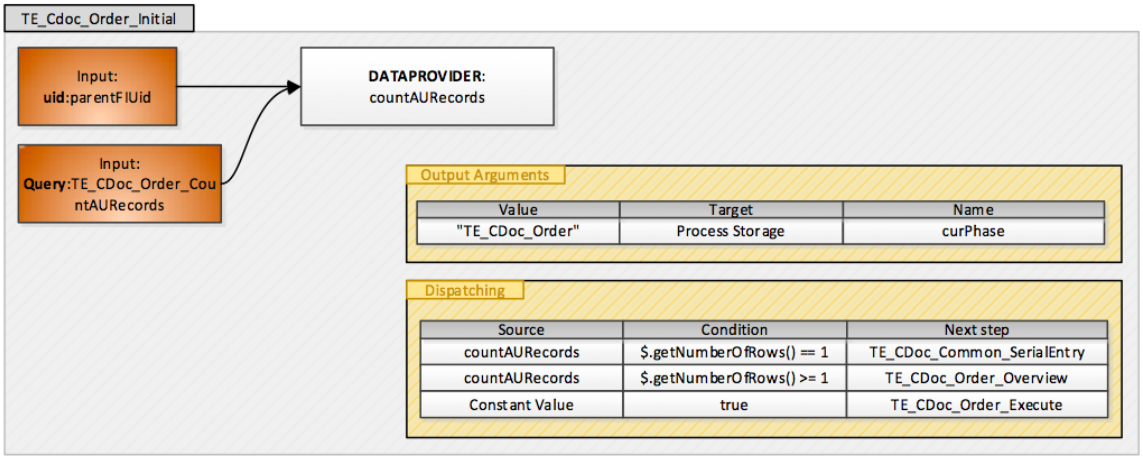
o No dispatching is needed as the user moves on via click on another phase.

Step – Flowchart



Initial Step

TE_CDoc_Order_Initial is the initial step for the "TE_CDoc_Order phase ". "countAURecords" data provider is used for counting existing AU records (linked to parent MA record) and the following dispatching in different steps. If the counter is 1 > go in serial entry with AU record. If the counter is greater than 1 > go in overview step where you can find the list of all existing records. If no AU record is found by the data provider > go in execute step, create an AU record and dispatch in serial entry step.



Overview Step

TE_CDoc_Order_Overview is the main step for an overview of AU records in the Order phase. A simple "Search" action template is called > SearchAndList name is "TE_CDoc_Order_Overview". The parent FI record is passed to the search as a link. There are some buttons configured in the SearchResultsSelect which hit a command that is requested by the dispatching in this step.

“SearchResultsSelect” Header IN Header Group “TE_CDoc_Order_Overview”

Used in the call documentation process in the "Order" phase in the "TE_CDoc_Order_Overview" step. All buttons execute a command which is requested by the process and dispatching step. > Header text = empty; all buttons are displayed with text.

Used buttons:

TE_CDoc_Order_Overview_New

- hits the “Proceed/cdoc-new” command

TE_CDoc_Order_Overview_NewDeliveryDate

- hits the “Proceed/cdoc-ld-new” command
- QueryStateAction “C_OneRowSelected”

TE_AU_OrderSummary

- executes the order summary report in new tab
- QueryStateAction “C_OneRowSelected”

Remember: Query State Action C_OneRowSelected: TODO

“SearchSubList” Header IN Header Group “TE_CDoc_Order_Overview”

Used in the call documentation process in the "Order" phase in the "TE_CDoc_Order_Overview" step. Used sub info areas:

Order Item (UP)

- use TE_UP_CDoc_Order_Overview header
- use TE_A_CDoc_Proceed DefaultAction

Order Delivery (LD)

- use TE_LD_CDoc_Order_Overview header
- use TE_A_CDoc_Proceed DefaultAction

Order Delivery Items (LP)

- use TE_LP_CDoc_Order_Overview header
- use TE_A_CDoc_Proceed DefaultAction

Remember: TE_A_CDoc_Proceed default action: TODO

Execute Step

TE_CDoc_Order_Execute is the main step creating new AU records within the process. The “ExpandNew” action template is used with arguments described below. After clicking the “Save” Button, the “Save” command is hit, the SerialEntry for order positions is opened. After a “Cancel” event, the process traces the “Proceed” command, the system dispatches to the overview step.

ExpandNew Attributes

- expandName: TE_CDoc_Order_Overview
- infoAreaId: AU
- link: $.get(“parentMAUid”)
- link2: $.get(“parentFIUid”)

“New” “TE_CDoc_Order_Overview” Header IN Header Group

So a new AU record is created with a link to the selected MA and the parent FI record. After saving the record, the new AU Uid is filled into the process storage variable “curAU”. This variable is called in some further steps to get the newly created AU record.

Used in the call documentation process in the "Order" phase in the "TE_CDoc_Order_Execute" step. Standard “Save” and special “Cancel” button, CORE_ProceedCancel.

Used buttons:

CORE_ProceedCancel

- hits the “Proceed” command
- Image: CancelEdit; Label: Cancel

Note: This “Proceed” command is captured in the execute step in dispatching to navigate back to the “TE_CDoc_Order_Overview” overview step after clicking the “Cancel” Button.

New Delivery Step

TE_CDoc_Order_NewDelivery is the step for creating new LD records within the process. The “ExpandNew” action template is used with arguments described below. After clicking the “Save” Button, the “Save” command is hit, the SerialEntry for order positions is opened.

ExpandNew Attributes

- expandName: LD
- infoAreaId: LD
- link: $.get("curAU")

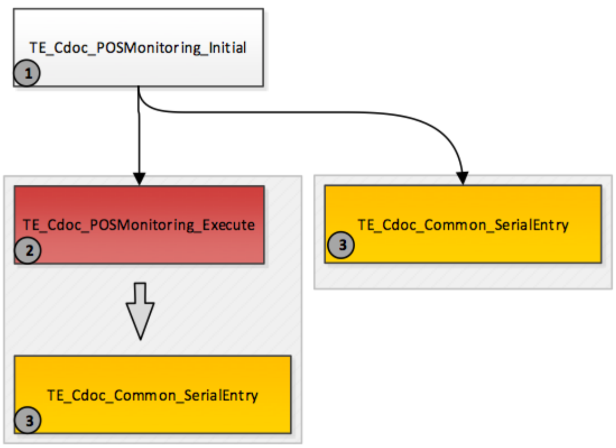
Note: The link is the UID from the newly created AU record, or if the user selects an AU record from the overview step, then this AU record's Uid is the curUid.

Common Expand Step

TE_CDoc_Common_Expand is used for opening records in Expand View. This step is called by **TE_CDoc_Complete Phase (Details of an MA Record)** given below.

TE_CDoc_POSMonitoring Phase (PS)

Step – Flowchart



TE_CDoc_Complete Phase (Details of an MA Record)

The "Complete" phase allows you to enter expenses related to the appointment. An overview of marketing objectives and follow-up objectives as well as tasks related to the visit allows you to create and edit related data. Finally you can generate a visit report and complete the call documentation.

Its structure is similar to the "Overview" phase but in addition you can create and edit data. This means we are using a few more process steps than in the "Overview" phase. Basically the process is displaying the 'TE_CDoc_Complete' form with MA-Details, AF-List, A1-List, D3-List and U011-List (Call Expenses) with U059-List (Quota, Budget).

TE_CDoc_Complete Form

The ExpandView (expandName: TE_MA_CDoc_Complete) of a selected MA record is displayed at the top via binding: model.uid: $component(url).#parentMAUid.

In comparison to the "Overview" phase a context menu is available to the user, the user can call the "Call Documentation Report" ('TE_MA_CallSummary' button) and also complete the current call ('TE_CDoc_MA_Complete' button).

Related Data

Note: Creating and editing related data is called via a button from a header or by a defaultAction from a ListView which always executes a command that is handled in the dispatching of the phase.

Note: The dashboard panel's "hideItemsIfEmpty" parameter is set to true and the ListView's "hideIfEmpty" parameter is set to true. If a related ListView has no results it is hidden.

The related data are displayed in a dashboard panel where the following ListViews are used:

Valid and Open Marketing Objectives

This ListView has a link to the parent FI record via binding: link: $component(url).#parentFIUid.

By only setting this link we would show all linked AF records for this FI record. In our case we only want to display valid AF records, so we have to set a filter with a parameter at the start date of the selected MA record. This filter has to be applied before loading the form with the ListViews. That's why we have created an additional process step. Building the correct filter statement is done in the "TE_CDoc_Complete_LoadFilter" process step. The filter is set via binding:

- model.dataProvider.reader.arguments.filterStatement: $component(url).#marketingObjectivesStatement
- The **Completed** button (TE_AF_SetStateToCompleted) calls the "TE_AF_SetStateToCompleted" trigger.

Valid and Open Follow-Up Objectives

This ListView has a link to the parent FI record via binding: link: $component(url).#parentFIUid.

All linked AF records for this FI record would be displayed by only setting this link. In our example we only want to display valid AF records, so we have to set a filter with a parameter on the start date of the selected MA record. This filter has to be applied before loading the form with the ListViews. Therefore we have added an additional process step. Creating the correct filter statement is done in the "TE_CDoc_Complete_LoadFilter" process step. The filter is set via binding:

model.dataProvider.reader.arguments.filterStatement: $component(url).#followUpStatement

The "+ New" button (TE_CDoc_AF_New_FollowUp_Obj) calls the "Proceed/New_AF_FollowUp_Obj" command which is used in the dispatching of the 'TE_CDoc_Complete_Execute' process step.

The **Completed** button (TE_AF_SetStateToCompleted) calls the "TE_AF_SetStateToCompleted" trigger.

Call Expenses

U011...Call Expense

U059...Quota

In the **Complete** phase we want to create a new Call Expense (U011). The "New" button (TE_CDoc_U011_New_CallExpense) calls the "Proceed/New_U011" command which is used in the dispatching of the 'TE_CDoc_Complete_Execute' process step.

The 'TE_CDoc_Complete_New_U011_CallExpense' form is used for creating a new U011 record and displaying a list of U059 records below.

The form consists of an U011 ExpandView in "New" mode and shows a SearchView of U059 ("TE_U059_Overview") with a "U059.TE_MyQuotas" fixed filter (quotas for the current rep) underneath.

The used expandname is: TE_U011_CDoc and the rootLinks are set via binding from the call documentation process.

The U011 ExpandView has an onSave event ($command(sender, "Proceed");) which calls a proceed command manually. This workaround was necessary to return to the process step.

My Open Tasks

This ListView displays the TE_A1_CDoc fieldGroup with fixedFilterName: A1.TE_CDoc_MyOpen and a link which is set via binding: link.infoAreaId: FI, link.linkId: 127, link.recordId: $component(url).#parentFIUid.recordId

The defaultAction is CORE_A_Expand_Process which is dispatching to the next step: "TE_CDoc_Common_Expand" with the standard expand name.

Documents

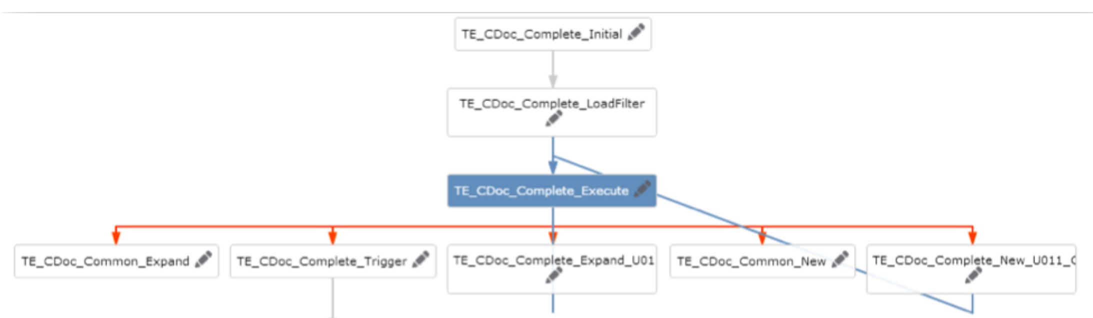
This ListView displays the TE_D3_CDoc fieldGroup and a link which is set via binding: link.infoAreaId: MA, link.linkId: 127, link.recordId: $component(url).#parent-MAUid.recordId

Creating new document links is the standard button which opens up a new tab.

Process Steps

This phase is active if the condition $.get("curPhase")=="TE_CDoc_Complete" is met. The "curPhase" variable is set in the output arguments of the initial step. So this phase can be clicked if an MA record is selected.

Basically there are 3 process steps for this phase:



- TE_CDoc_Complete_Initial

o The initial step for the "Complete" phase. Set the process storage variable "cur-Phase" to

"TE_CDoc_Complete", so that this phase becomes active. o Dispatching to the "TE_CDoc_Complete_LoadFilter" step

- TE_CDoc_Overview_LoadFilter

o Calling the action template “JavaScriptWithCallback” with the following function:

u8.TeLSI.CDoc.preShowForm_Overview_Complete. In the function:

- We are loading 2 fixed filters (AF.TE_CDoc_ValidAFNotLinkedToAK and AF.TE_CDoc_ValidAFLinkedToAK). It is possible to change the filters and to add additional parameters. (The parameters must be named like “$parValue<no>”).
- The filters are loaded from the designer.
- The parameters for those filters are set with the selected MA record’s field

  “StartDate”.
- The final filter statement is written back into the process storage and passed on to

  the form.

o Dispatching to the "TE_CDoc_Complete_Execute" step on callback of the JavaScript

function.

- TE_CDoc_Overview_Execute

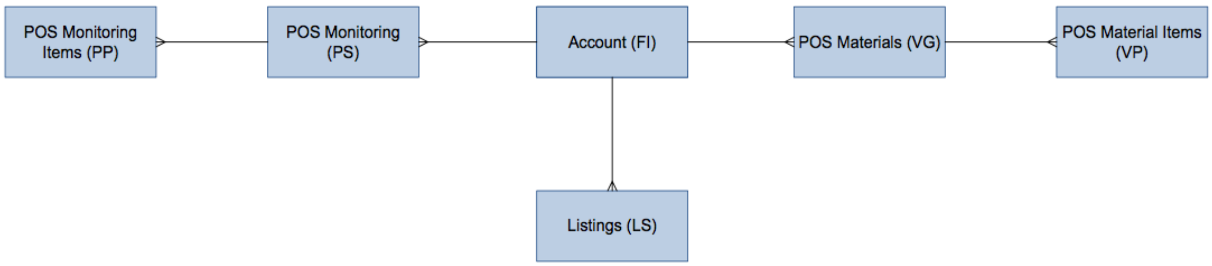
o Showing the Form 'TE_CDoc_Overview' form and passing arguments (FormName, final filter statements and uids) to the form.

o Creating and editing related data is done via dispatching:

OTC Business (CRM # 6007000)

Learn how to monitor point-of-sale in over the counter business.

POS Monitoring consists of the PS info area and its child info area (POS Monitoring Items (PP)), displayed in the “Related Data” tab.



Callable from:

- Application Menu -> Reference Book
- FI Tree (for ‘Pharmacy’ account type)

Key Account Management Overview

In the FI TreeView you can find a new overview page.

The ‘TE_KAM_Overview_Search’ form consists of 3 dependent SearchViews. The selected records are displayed in an ExpandView underneath. It is possible to easily create and update records in this form.

Selecting a record from search results starts a search for child records.

TE_U002_Overview >> TE_Y1_Overview >> TE_U500_Overview

In the “generic” ExpandView below you can always see the last selected record.

Info area U500 - Plan Product

Learn about the new info area that was created to join “Item Master” (AR) records with an “Opportunity/Detailplan” (Y1).

Using the standard “Opportunity Products” (Y5) info area caused too many problems with existing business logic.

Quick Add for U500

Key Account Management uses 3 different quick add actions. The only difference is the used List Control.

The “**TE_U500_SerialEntry**” button calls the QuickAdd with the name “Y1(AR=>U500)” and uses the U500.SerialEntry FieldGroup.

The “**TE_U500_SerialEntry_BulkListing**” button calls the QuickAdd with the name “Y1(AR=>TE_U500_BulkListing)”and uses the TE_U500_BulkListing.SerialEntry FieldGroup.

The “**TE_U500_SerialEntry_JobCards**” button calls the QuickAdd with the name “Y1(AR=>TE_U500_JobCards)” and uses the TE_U500_JobCards.SerialEntry FieldGroup.

Info Area U061 - Listing

Learn about the new header info area for clustering LS records was created. U061 is a child info area 1-N to FI.

It contains the fields “Listing name”, “valid from”, “valid to” which are triggered to all child LS records by the “TE_LS_UPD_SetFieldsFromU061” trigger on new with the “Manually changed == false” condition. If you change a LS record manually, changes from the U061 head record is not updated. See more information in the Trigger Logic: U061   LS (if LS was not Manually Changed) .

The number of LS records is triggered into the field U061.5006 “Number of Listing Items” by the “TE_U061_Count_ListingItems” trigger.

Info Area LS - Listing Item

The “LS” info area was renamed to “Listing Item”. The business logic for Listing and Listing inheritance is still applied to this info area.

Trigger Logic: U061   LS (if LS was not Manually Changed)

Values from U061 are triggered (Trigger “TE_LS_UPD_SetFieldsFromU061”) to LS as long as the “Manually changed” (LS.15500) field is unchecked. If the “Valid from” (LS.42), “Valid to” (LS.43) and “Listing status” (LS.5001) fields are changed, then the Hook function $.setValue("15500",true); is called.

If the info area U061’s fields “Valid from” (5004), “Valid to” (5005) or “Listing status” (5015) are updated, the trigger “TE_LS_UPD_SetDummyField” is called.

The trigger “TE_LS_UPD_SetDummyField” switches the field value of LS.15501.

On UPD fields of LS.15501 the “TE_LS_UPD_SetFieldsFromU061” trigger is called which copies the “Valid from”, “Valid to” and “Listing status” fields to all child LS records which apply to the “Manually changed == no” condition.

Trigger for Counting Listing Items

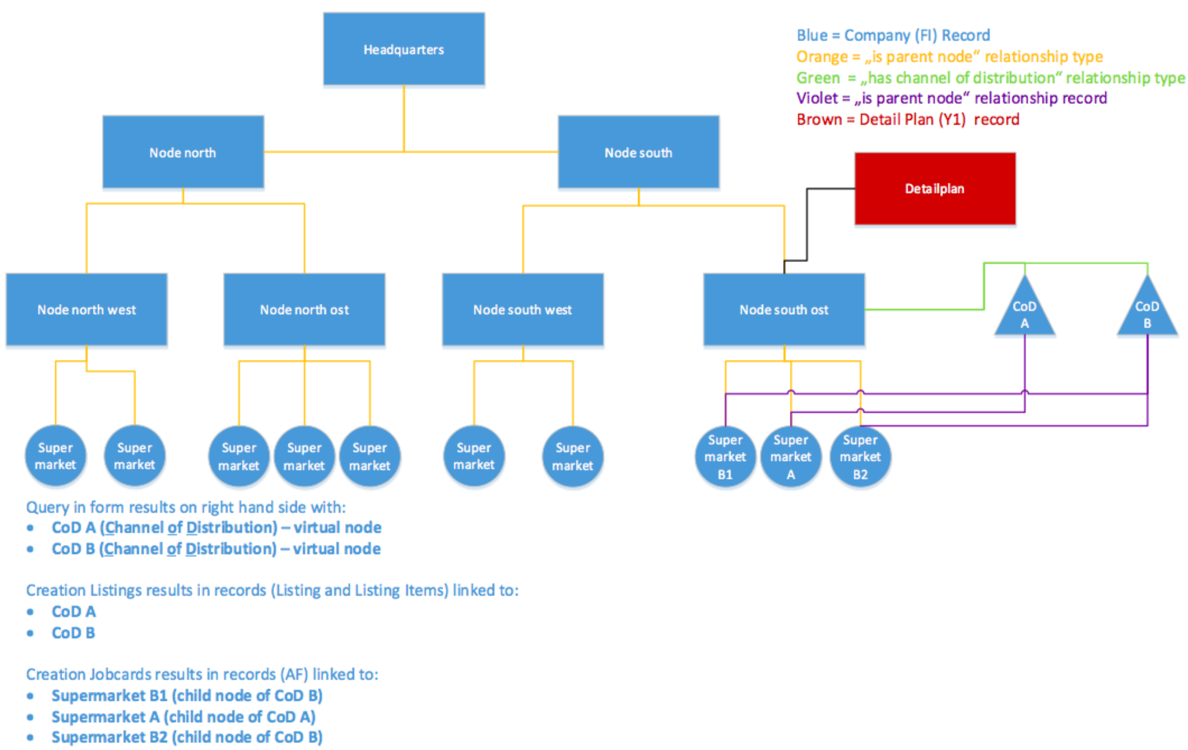
The “TE_U061_Count_ListingItems” trigger is started on New, Delete of the U061 info area.

Data Prerequisites for Key Account Management

Here you can see the data structure on which KAM is based.

Prerequisites:

1. For the “Jobcards” functionality please make sure that the CRM server is running. For your information: the jobcards (work orders AF) are added through the business logic of the campaign management. The REP MUST CRM server has the correct role to be able to create eg. MA, AF,...!
2. Starting from Detail Plan (Y1), you need to create at least one Plan Product (U500). These records are displayed on the left side.
3. The Detail Plan (Y1) is linked to a company (FI). This account needs relationship data sets (PB) to other companies with the “has channel of distribution” relationship type (German: “ist Vertriebslinie von”). The right hand side displays the result from query: 'TE_KAM_ChannelOfDistribution'. If no results are available you can search for any company.



Bulk Listing

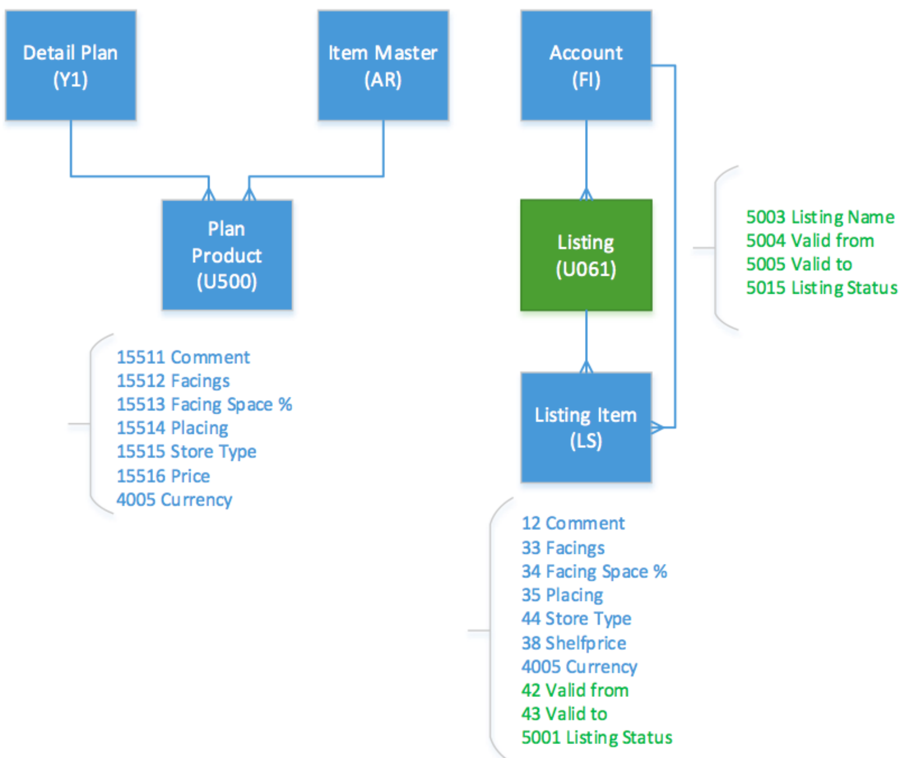
This feature enables key account managers and administrators to easily create and update multiple Listing records (U061) and multiple Listing Items (LS) to multiple target accounts (FI).

This feature returns a message (MD record) of created/changed records and any errors which occurred (maybe due to rights restrictions).

This feature is implemented within the update.template.LSI.dll and can be called as a channel.

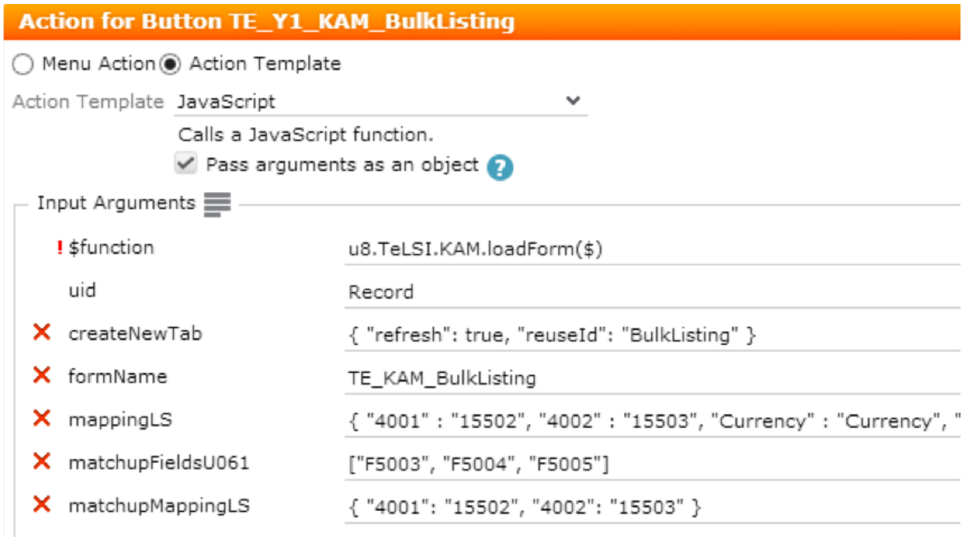
Data Model

The LS info area is linked 1-N to AR, U061, FI and U500.



Action

Y1.Expand Header contains the 'TE_Y1_KAM_BulkListing' button which calls the ‘u8.TeLSI.KAM.loadForm($)’ JavaScript function. At first we read all selected records and read all values from input fields. These uids and values are passed as options to the channel.



Input Arguments

Argument	Description	Template default value
formName	The form’s name	TE_KAM_BulkListing
mappingLS	Defines which fields are copied from U500 to LS. The syntax is: { “U500.fieldID” : “LS.field-ID” } or { “U500.xml-name” : “LS.xml-name” } See the chapter Mapping of field- IDs for more details.	{ "4001" : "15502", "4002" : "15503", "Currency" : " Currency ", "15507" : "ItemNo", "15508" : "ItemName", "15511" : "Text", "15512" : "Facings" , "15513" : "FacingP" , "15514" : "Placing1", "15515" : "ChainStoreType", "15516" : "Price" }
matchupFieldsU061	An array of fieldIDs or XML names of info area U061. These fields are used to match up an existing U061 record. The syntax is: [“U061.fieldID”,”U061.xml-name”]	["F5003", "F5004", "F5005"]
matchupMappingLS	Defines which fields are used to matchup U500 with LS records. The syntax is: { “U500.fieldID” : “LS.field-ID” } or { “U500.xml-name” : “LS.xml-name” }	{ "4001": "15502", "4002": "15503" } Template is using link fields. So the mapping of a plan-product record to listing-item record is unique.

Important: Mapping for Sales Cycle (VR) does not work in mappingLS. Linking infoareas in serverside code is not possible via StaNo, SerNo. This is done in trigger “TE_LS_UPD_SetSalesCycleFromU500”.

Special Header

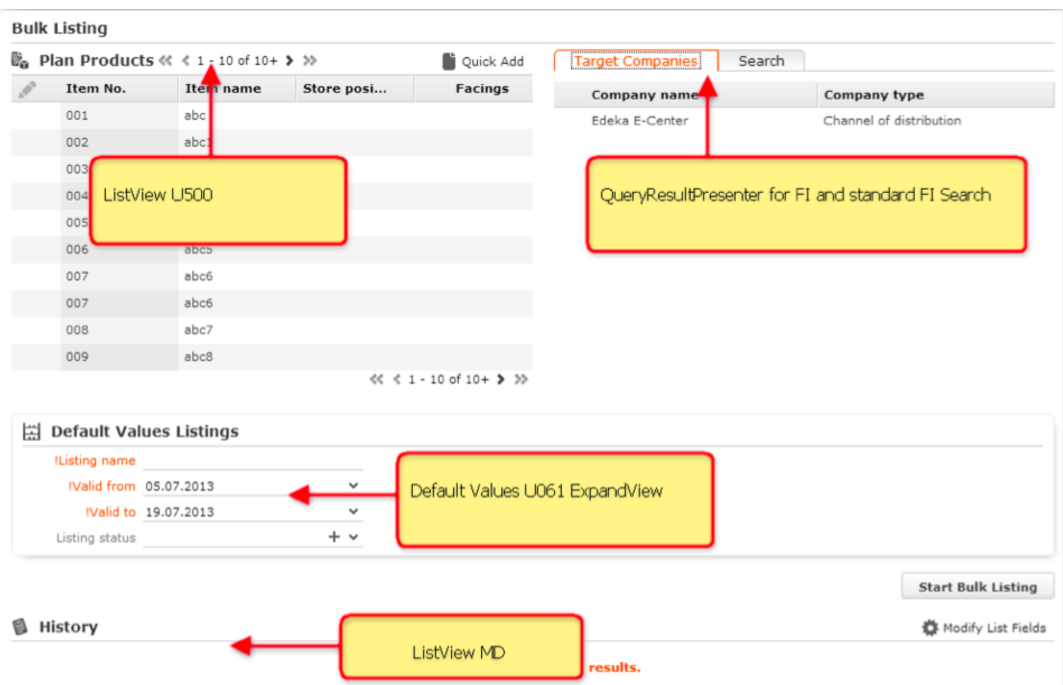
The special header is hard-coded to the ‘TE_BulkListing’ header, but is overwritten by the ‘TE_Y1_KAM_BulkListing’ TableCaption on creating the form. If you want to change the header text in the form, you have to configure the table caption in the Y1 info area.

To load the header text to the form it is necessary to read the table caption via u8.services in lsikam.js and send it to the form. Therefore, the following code is used:

```
u8.services.tableCaptions.read({ uid: y1Uid, tableCaptionName: "TE_Y1_KAM_JobCards" },
function(captionSender, captionArgs) {
    // Navigate to Form "TE_KAM_JobCards"
    u8.services.navigation.navigateToPage("showform",
    { formName : formName,
        createNewTab : createNewTab,
        debugMode : debugMode,
        uid : y1Uid,
        y1TableCaption : captionArgs.tableCaption.getText(),
        fiuid : args.uid
```

Form

The main form is 'TE_KAM_BulkListing' which contains the following items:



The **U500** ListView is defined in the ‘TE_U500_BulkListing’ FieldGroup. The mapping for U500 LS and the match-up are defined in the action’s Input Arguments.

The default values for **U061** and resp. for LS (see chapter Trigger Logic: U061   LS (if LS was not Manually Changed))) are entered in the **TE_U061_BulkListing** ExpandView. All fields on the Details Control are used as default values. So it is very easy to customize and to add your “own” fields to the mask.

Clicking the “**Start Bulk Listing**” button calls the u8.TeLSI.BulkListing.createListing(sender) method; The “lsikam.js” JavaScript file holds the whole logic for KAM.

For every “Bulk Listing” you get a response message which is saved to an MD record. Those records are linked to the Detail Plan (Y1) and displayed in a list below called **History**.

The query for **target companies** is described in the next chapter “Query for Target Companies”.

Query for Target Companies

The '**TE_KAM_ChannelOfDistribution**' query is used in the 'TE_KAM_Bulklisting' and 'TE_KAM_JobCards' forms. This query manages the displayed target companies. It currently shows companies via relationships with the "Channels of Distribution” relation.

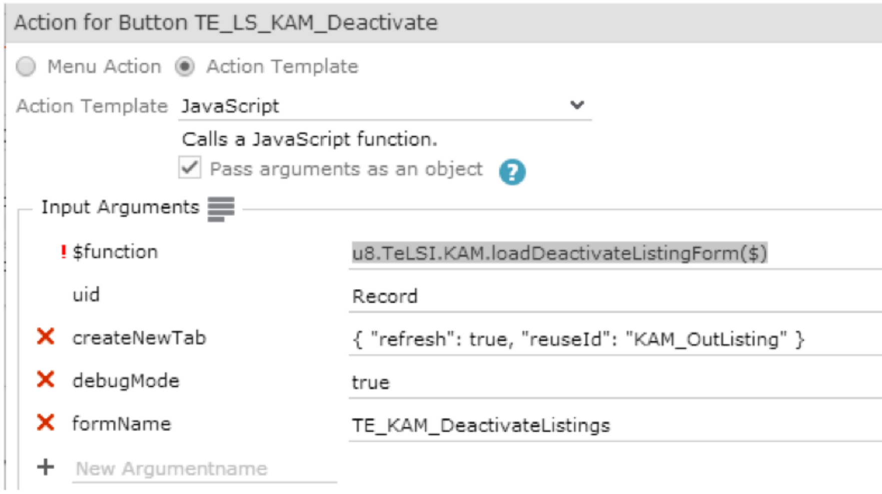
Note: You can use any query in the action’s call or change the existing query’s condition.

Note: If you are changing the query, you also have to enter the correct query alias in the form. Otherwise the reading of selected target companies does not work properly! Go to designer >> FORM 'TE_KAM_BulkListing' >> QueryResultPresenter >> grid >> **defaultALIAS**

Deactivate Listing

Action

The Y1.Expand header contains the 'TE_LS_KAM_Deactivate’ button which is calling the ‘u8.TeLSI.KAM.loadDeactivateListingForm($)’ JavaScript function.



Input Arguments

Argument	Description	Template default value
formName	The form’s name	TE_KAM_DeactivateListings

Form

The ‘TE_KAM_DeactivateListings’ form is divided into 3 dashboard panels:

1. Search for Listing Items
2. Show Listing Items Search Results
3. History

Clicking “Search” in searchViewLS calls the javascript function u8.TeLSI.KAM.onExecuteSearchViewLS(sender); on Event onExecute, so when the search results are here. We are copying all filter settings and combine them to a faked result list for Listing Items.

Clicking the button **buttonOutlisting** raises the onClick event `u8.TeLSI.KAM.onClickButtonOutlisting(sender)`; it calls the channel called KeyAccountManagementChannel.ExecuteOutListing. The serverside code updates the field for all selected records and shows an Info message and refreshs History (MD) list.

Creating JobCards

This feature enables key account managers and administrators to easily create and update Special Offers (AT) and Special Offer Items (AA) as well as creating a parent Marketing Activity (AK) record and Execution (AD) record to multiple target accounts (F).

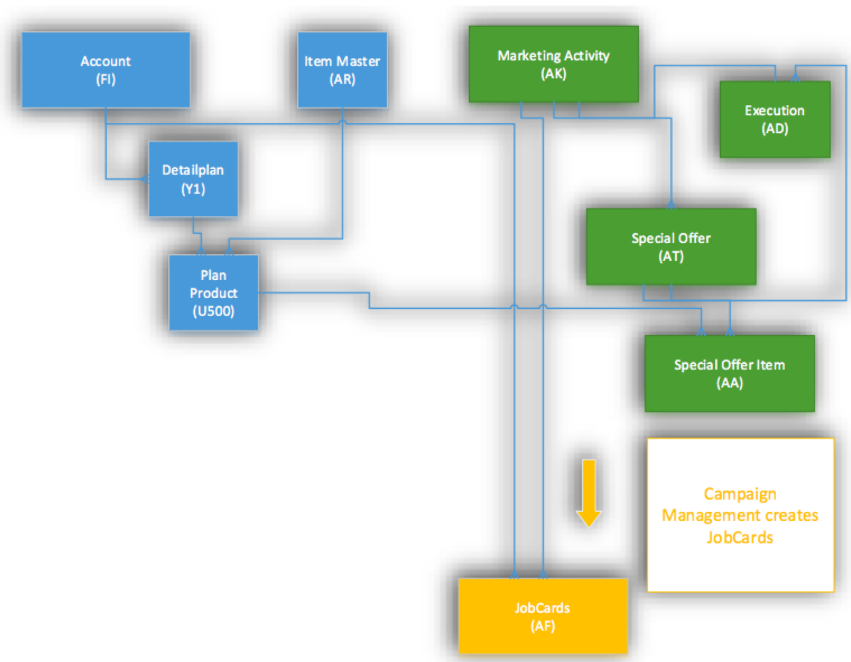
The main goal is to create JobCards/Work Order (AF) records. These records are created by “standard” campaign management.

This feature returns a message (MD record) of created/changed records and any errors which occurred (maybe due to rights restrictions).

This feature is implemented within the update.template.LSI.dll and is callable as a channel.

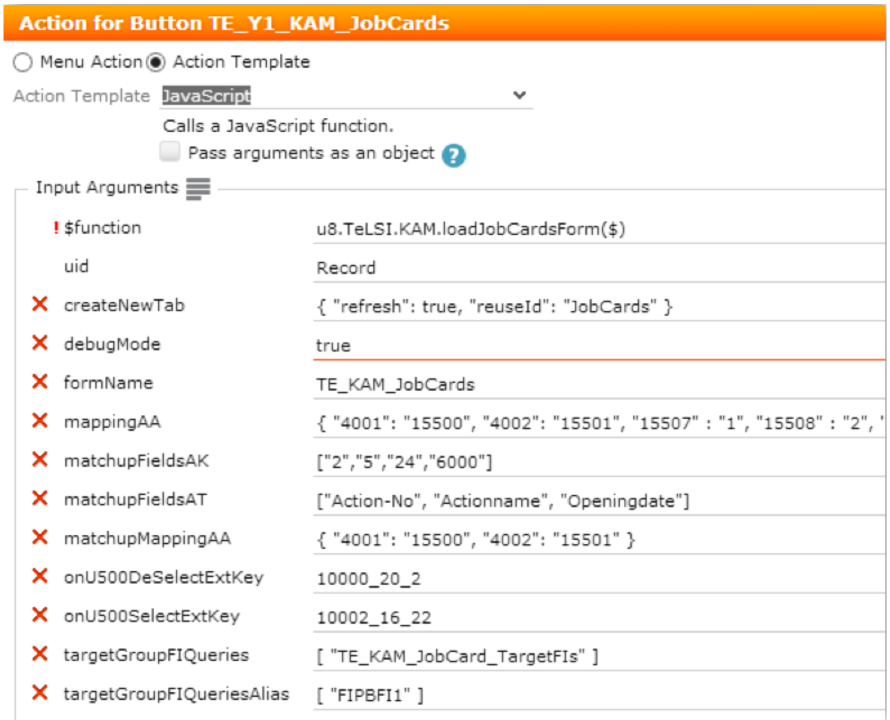
Data Model

The AA info area was additionally linked to the U500 info area.



Action

The “Y1”expand header contains the 'TE_Y1_KAM_JobCards’ button which calls the ‘u8.TeLSI.KAM. loadJobCardsForm ($)’ JavaScript function. At first we are reading all selected records and reading all values from input fields. These uids and values are passed as options to the channel.



Input Arguments

Argument	Description	Template default value
createNewTab		{ "refresh": true, "reuseId": "JobCards" }
debugMode	Displays all selected values and uids in the form before calling the channel.	false
false	The form's name	TE_KAM_JobCards
mappingAA	Defines which fields are copied from U500 to AA. The syntax is: { U500.fieldID : AA.fieldID } or { U500.xml-name : AA.xml-name } See the chapter "Mapping of field- IDs" for more details.	{ "4001": "15500", "4002": "15501", "15507" : "1", "15508" : "2", "4005" : "4005", "15517" : "34", "15518" : "18", "15519" : "19", "15520" : "20" }
matchupFieldsAK	An array of fieldIDs or XML names of the AK info area. These fields are used to match up an existing AK record.	["2","5","24","6000"]
matchupFieldsAT	An array of fieldIDs or XML names of the AT info area. These fields are used to match up an existing AT record.	["Action-No","Actionname", "Openingdate"]

Argument	Description	Template default value
matchupMappingAA	Defines which fields are used to matchup U500 with AA records. The syntax is: { U500.fieldID : AA.fieldID } or { U500.xml-name : AA.xml-name } See the chapter Mapping of field- IDs for more details.	{ "4001" : "15500", "4002" : "15501" }
onU500DeSelectExtKey	The external key of variable catalog 16 used in AK.2 Marketing Activity. This ext.key is set as default value on AK on deselecting all U500 records. “Product Information (BASE)”	10000_20_2
onU500SelectExtKey	The external key of variable catalog 16 used in AK.2 Marketing Activity. This ext.key is set as default value on AK on deselecting all U500 records. “Product Information (BASE)”	10000_20_2
onU500SelectExtKey	The external key of variable catalog 16 used in AK.2 Marketing Activity. This ext.key is set as default value on AK on selecting a U500 records. “Special Offer (BASE)”	10002_16_22

Argument	Description	Template default value
targetGroupFIQueries	An array of queries which are used for finding target FI records for generating TargetGroups (AG) resp. JobCards (AF). The syntax is: [“<queryname1>”, ”<queryname2>”, ...]	["TE_KAM_JobCard_TargetFIs"]
targetGroupFIQueriesAlias	An array of aliases which are used for the corresponding targetGroupFIQueries. The syntax is: [“<queryAlias>”, ”<queryAlias>”, ...]	[“FIPBFI1”]

Special Header

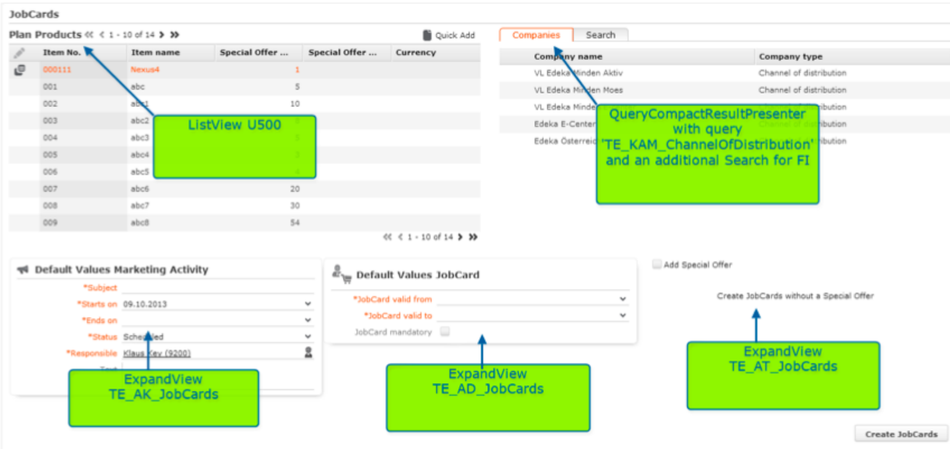
The Special Header is hard-coded to the ‘TE_JobCards’ header, but is overwritten by the ‘TE_Y1_KAM_JobCards’ TableCaption when the form is created. If you want to change the header text in the form, you have to configure the table caption in the info area Y1.

To load the header text to the form it is necessary to read the table caption via u8.services in lsikam.js and send it to the form. Therefore, the following code is used:

```
u8.services.tableCaptions.read({ uid: y1Uid, tableCaptionName: "TE_Y1_KAM_JobCards" },
function(captionSender, captionArgs) {
    // Navigate to Form "TE_KAM_JobCards"
    u8.services.navigation.navigateToPage("showform",
    { formName : formName,
        createNewTab : createNewTab,
        debugMode : debugMode,
        uid : y1Uid,
        y1TableCaption : captionArgs.tableCaption.getText(),
        fiuid : args.uid
```

Form

The main form is ‘TE_KAM_JobCards’ which contains the following items:



The **U500** ListView is defined in the 'TE_U500_JobCards' FieldGroup. The mapping for U500 AA and the match-up are defined in the action's Input Arguments.

The default values for **AK, AD and AD** are entered in ExpandView in "New" mode. All fields on the Details Control are used as default values. So it is very easy to customize and to add your "own" fields to the mask.

Note: There are several mandatory fields on the mask which are hidden! Values can be set via default value triggers (used in the "TE_RR Key Account – CG" role right and are using triggers named something like "KAM" (e.g.: TE_AK_DV_Set_KAM_Values, TE_AD_DV_KAM_Values). For testing purposes we recommend to unhide all fields from masks. Otherwise you can get error messages and miss mandatory fields that must be filled out!

Tip: It is possible to hide almost all values for e.g. the AD info area (which is sometimes confusing for users) and prefill the values either via trigger on NEW or via the hook function from other default values.

Tip: Solution for creating the special offer number field (AA) see chapter "TE_AT_UPD_SetSpecialOfferNo".

Clicking the "Create JobCards" button is calling the u8.TeLSI.KAM.createJob-Cards(sender); method The "lsikam.js" JavaScript file holds the whole logic for KAM.

For every call you get a response message which is saved to an MD record. Those records are linked to the Detail Plan (Y1) info area and displayed in a list below called History.

The query for target companies is described in the chapter Query for Target Companies.

Hook Functions to copy values

The JobCard form contains 3 ExpandViews (AK, AD, AT) with similar fields like “Starts on”, “Ends on”. In most cases these fields must be synchronized and must contain the same values.

The _hookSetValueTo($, info area, fieldID, overwrite) hook function has to be added to the source field. It sets the hooked field value to a target field. You can define target expand info area, fieldID and configure overwrite (Boolean) if the hook function should overwrite existing values.

Note: It is also possible to add multiple hook functions like this, e.g.:

u8.TeLSI.KAM._hookSetValueTo($, "AD", 58, true);

u8.TeLSI.KAM._hookSetValueTo($, "AT", 2, true);

Default Values from Y1 - copyFields

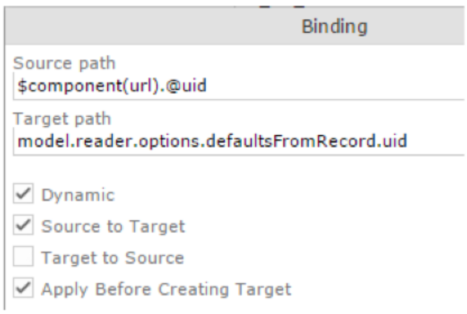
In most cases the important fields are already entered in the Y1-record. If the user starts “Creating JobCards” he has to enter some values again in the 3 ExpandViews (AK, AD, AT). These values can be easily set as default values by means of binding in forms.

Go to the target ExpandView >> model >> reader >> options >> defaultsFromRecord

For each field enter at first the field id of the target infoarea and then the Y1 field id like: target.ID - Y1.ID

Enter the uid from binding: $component(url).@uid

Tip: Set the binding parameter “apply before creating target”: true



Mapping of field-IDs

Here is an overview of identical fields for the U500 info area to LS or AA. This is helpful to define the mapping for input arguments of actions for BulkListing and JobCards.

Field name English	Field name German	Type	U500 fieldID	U500 XML name	LS fieldID	LS XML name	AA fieldID	AA XML name
U500-StaNo	U500-StaNo		4001	StatNo	15502	F15502	15500	F15500
U500-SerNo	U500-SerNo		4002	SeqNo	15503	F15503	15501	F15501
Currency	Währung		4005	Currency	4005	Currency	4005	Currency
Item No.	Artikel-Nr.	text (18)	15507	F15507	2	ItemNo	1	ItemNo
Item name	Artikelname	reference AR	15508	F15508	3	ItemName	2	ItemName
Quantity	Menge	int (4 Byte)	15509	F15509	---	---	---	---
Status	Status	var catalog 8001	15510	F15510	---	---	---	---
Comment	Text	text (100)	15511	F15511	12	Text	---	---
Facings	Facings	int (4 Byte)	15512	F15512	33	Facings	---	---
Facing Space %	Facing Bereich %	decimal (4 Byte)	15513	F15513	34	FacingP	---	---
Store position	Platzierung 1	var catalog 105	15514	F15514	35	Placing1	---	---
Store type	Filialtyp	var catalog 450	15515	F15515	44	ChainStoreType	---	---
Price	Preis	decimal (8 Byte)	15516	F15516	38	Price	---	---

Free goods shared	Naturalrabatt Anteil	decimal (8 Byte)	15517	F15517	---	---	34	DiscountvolinkPortion
Special Offer Quantity	Aktionsmenge	int (4 Byte)	15518	F15518	---	---	18	Quantity
Special Offer Price	Aktionspreis	decimal (8 Byte)	15519	F15519	---	---	19	Price
Sort	Sortierung	int (4 Byte)	15520	F15520	---	---	20	SortField
Order	Auftrag	y/n	15522	F15522	---	---	22	DisOrder
POS Monitoring	POS-Beobachtung	y/n	15523	F15523	---	---	25	DisPOS
POS Material	POS-Material	y/n	15524	F15524	---	---	23	DisclosedCN
Sample	Muster	y/n	15525	F15525	---	---	26	S-Sample

TE_AT_UPD_SetSpecialOfferNo Trigger

It is confusing to enter a “Special Offer No.” (AT.0) for almost every user although you can enter text as well. This trigger is called in the station right and prefills the AT.0 field like this “<year>_<month>_<day>_<field AT.1>”. The field is hidden in the template when new records are added and prefilled by this trigger.

It is called on NEW and UPD on the AT.1 field (Special Offer Name) with the condition that the target field is empty.

The trigger’s “Accomp. Text” is empty because it is brought as a message to the web UI.

TE_AD_DV_KAM_Values and TE_AK_DV_Set_KAM_Values Triggers

These triggers include default values for the key account management. The triggers are included in the station right but they are linked to the "1.2.7.1.403.1" process. This process is only visible to BackOffice, KAM and Management. So it is only executed for these roles.

KAM Calendar

The Key Account Management Calendar displays Marketing Activities dependent on calendar weeks. XSLT Report called from the TE_ID_NET_KAM_Calendar application menu.

There is no possibility to filter on AK records.

Special Characters

In order to use special characters like “%” or “&” within the report, a JavaScript function was used.

```
function replaceSpecialCharacters(s)
{
    s = s.replace(/&/g,"&amp;");
    s = s.replace(/"/g,"&quot;");
    s = s.replace(/</g,"&lt;");
    s = s.replace(/>/g,"&gt;");
    s = s.replace(/'/g,"&#39;");
    return s;
}
```

This function can be extended with all special characters that the user wants to use.

The function is used as follows within the code:

select="tools:replaceSpecialCharacters(string($curr_activity/field[@fid=6000]))"

Sales Cycle Management (#1.2.403)

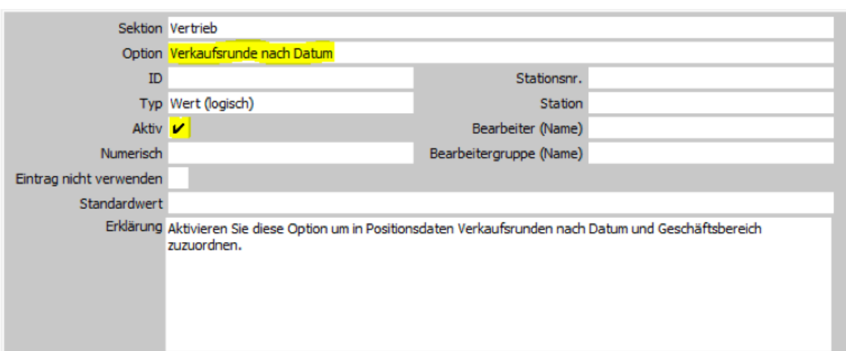
Learn to plan, execute and analyze sales cycle.

General Information

A year can be divided in several sales cycles. A sales cycle defines a time period during which focus items can be set and special target groups with specific KPI can be defined.

The target group for bulk consumer boxes mostly stays the same all year, but the target group for single cones and bars or multipacks can differ.

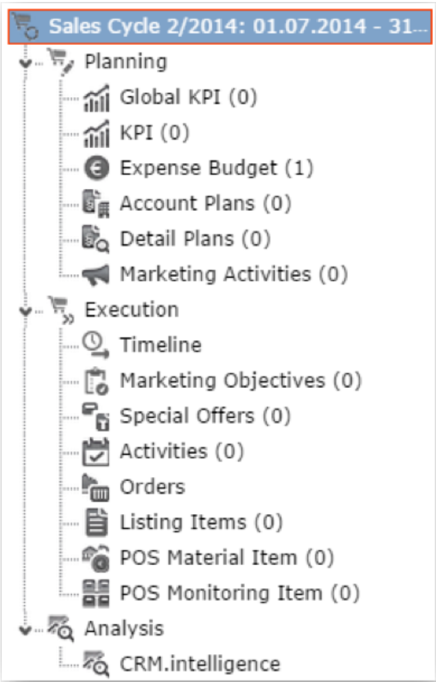
Activate: Win Configuration entry for using sales cycle based on date.



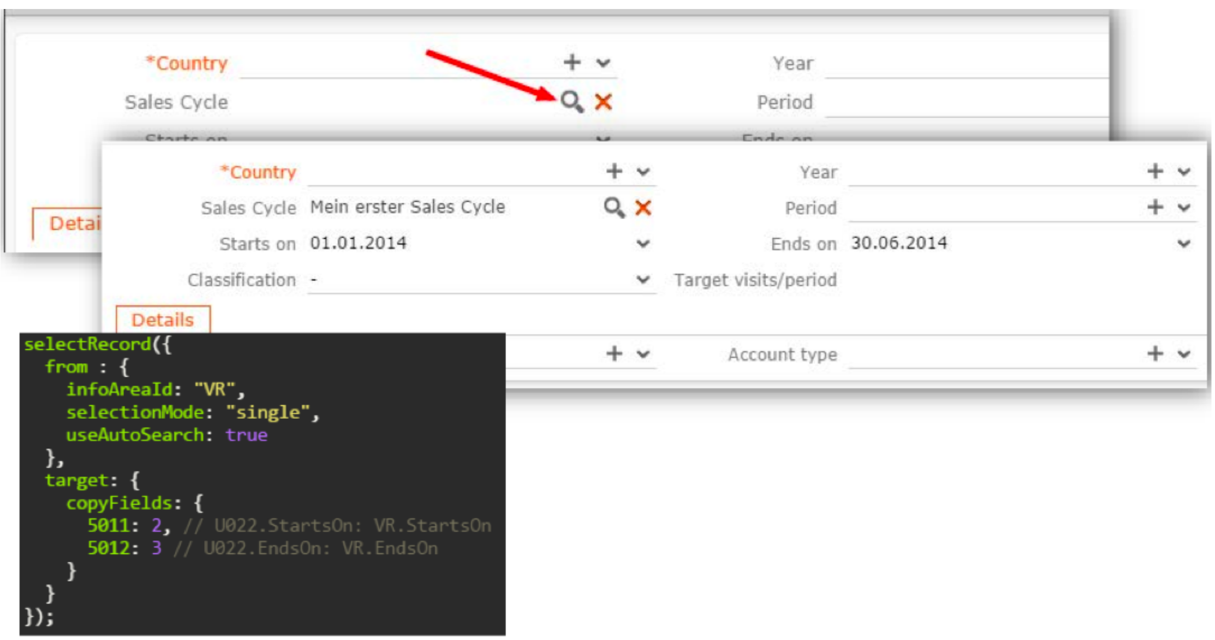
Tree view

Sales cycles are divided in three parts:

- Planning
- Execution
- Analyses



Record Selectors (Global KPI)



3

Administration

Learn about CRM process administration to manage user interfaces.

CRM Processes are used to manage visibility of the user interface (masks, buttons, tabs, actions ...) in the template. Processes make it possible to hide units/elements in the user interface.

Configuration (MC)

Calendar >> Holidays

There are no MC-records delivered with Category: Calendar and Option: Holidays in the LSI&CG Business solution.

The XML files containing the default calendar definitions are located at ..\system\xml\Calendars. For more information please look at the CRM.core Administrator Guide.

Tenants

With version 2 we have introduced two new tenants in the template. 9004 and 9005. The old tenant 9001 for catalog values was deleted.

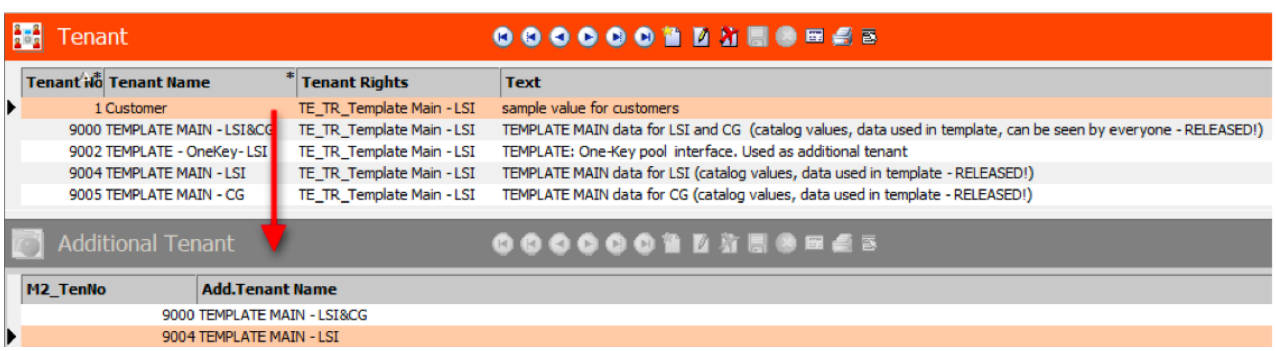
Number	Tenant Name	Catalog values released	can be seen by	Text
1-8999	Customer	No	-	sample value for customers
9000	TEMPLATE MAIN - LSI&CG	Yes	everyone	TEMPLATE MAIN data for LSI and CG (catalog values, data used in template, can be seen by everyone - RELEASED!)
9004	TEMPLATE MAIN - LSI	Yes	LSI tenants	TEMPLATE MAIN data for LSI (catalog values, data used in template - RELEASED!)
9005	TEMPLATE MAIN - CG	Yes	CG tenants	TEMPLATE MAIN data for CG (catalog values, data used in template - RELEASED!)

The template includes tenant 1 as a sample value for your customer. Tenant 1 has tenant 9000 as additional tenant.

In LSI&CG projects you have to add tenant 9004 or 9005 depending on either you are using a LSI or CG project.

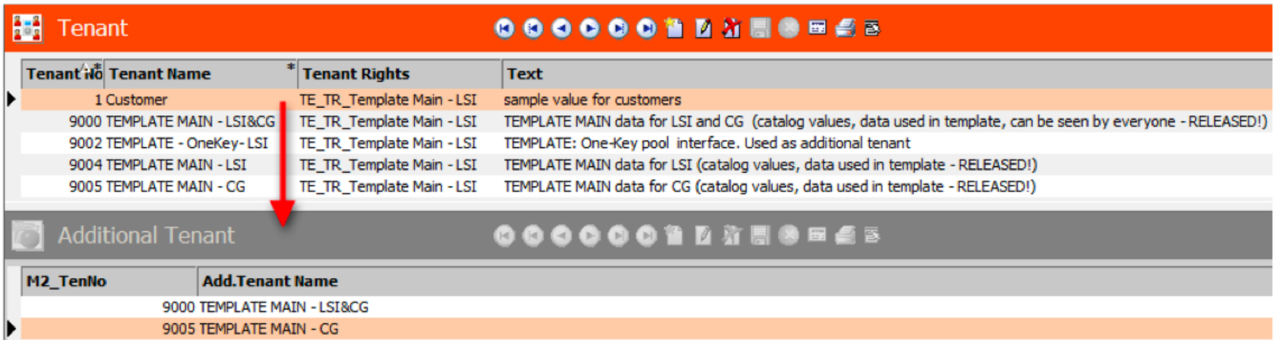
- **Example LSI-project**

  Add additional tenant 9004 for LSI-projects.



- **Example CG-project**

  Add additional tenant 9005 for CG-projects.



Rep Management (CRM #50000670)

Callable from **Settings** > **System Administration** .

Buttons

- TE_ID_UserGroups
- TE_ID_Resource
- TE_ID_Users
- TE_ID_NewResource

  Button pre-fills field Type (ID/68) with value ‘Resource‘ (cat value 2)
- TE_ID_NewUser

  Button pre-fills field Type (ID/68) with value ‘Employee‘ (cat value 0)
- TE_ID_NewUserGroup

  Button pre-fills field Type (ID/68) with value ‘Group‘ (cat value 1)

Filters

- ID.TE_ShowResources
- ID.TE_ShowUserGroups
- ID.TE_ShowUsers

Queries

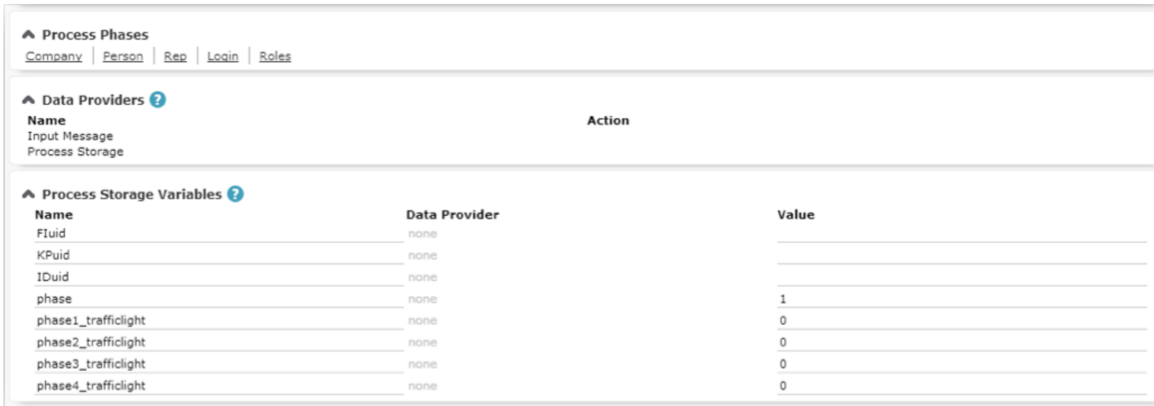
- US.FindAsYouType Forms
- TE_ID_Information

  Presents Search and below it Expand View with Related Data of info area ID.

New Rep Process (CRM #50000670)

We created a new process called "CORE_ID_New".

Used Process Storage Variables:



Fluid >> Company which is linked to the rep

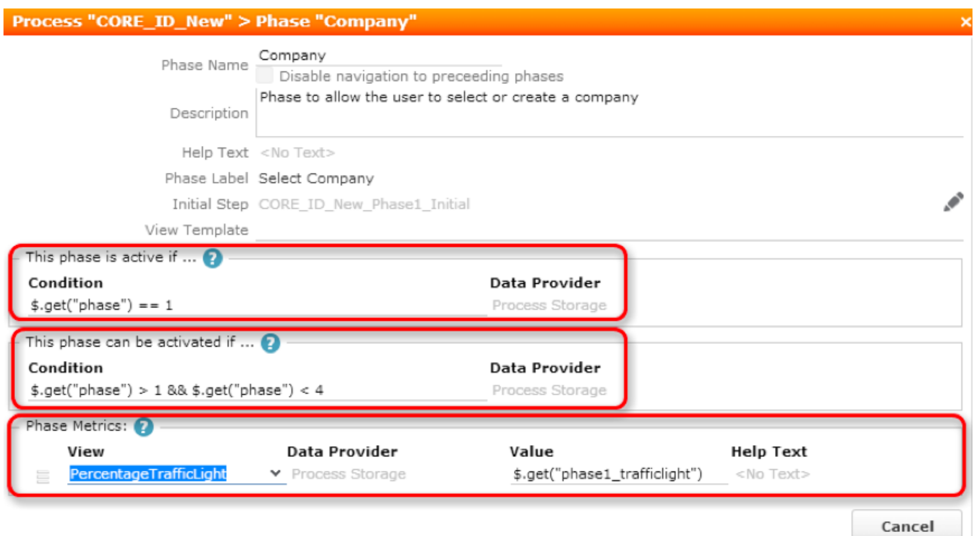
KPuid >> Person who is linked to the rep

IDuid >> Rep (after creating the ID record, used as parent for the login configuration ES and rep roles R3)

phase >> active phase

trafficlights >> process storage variables to visualize the traffic light metric for each phase

Example phase definition of phase 1:

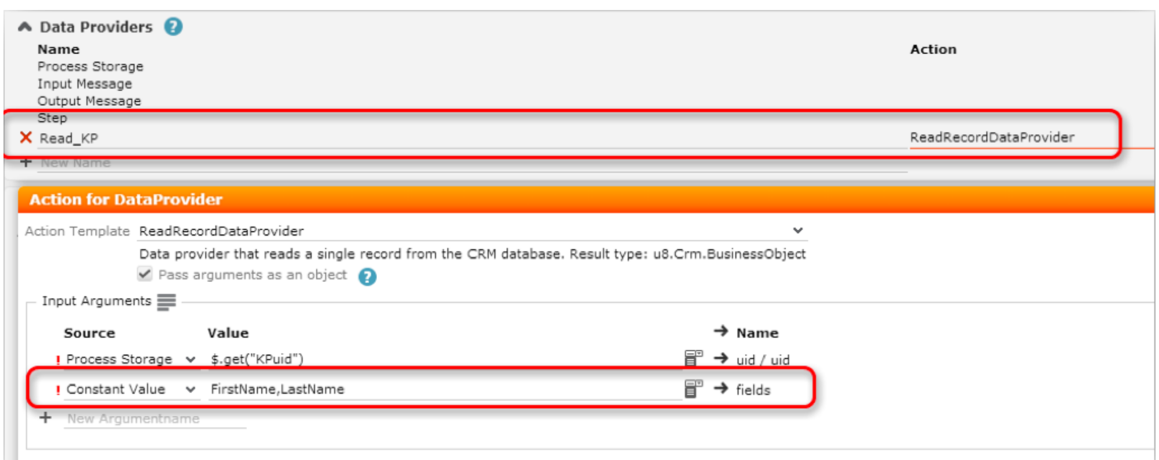


Process Tree

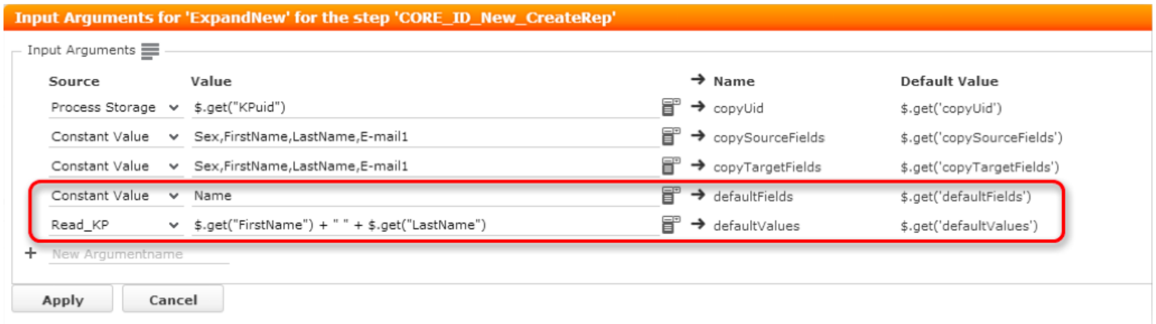
After selecting a company and a person, we're reading some fields of the person record in the step "CORE_ID_New_ReadKP", because we want to set the field "FirstName" and "LastName" as default value for the field #3 (description) of the new rep record.

The step "CORE_ID_New_Phase1_Initial" is used, if the user clicks the first phase in the header of the process. If the user steps through the process without clicking the phase, this step is not executed.

The step "CORE_ID_New_Phase2_Initial" is not only used if the user click the phase. The step is also used, to set the phase and the trafficlight variables when moving from phase1 to phase2.



In the dispatching area we're handing the combined string (FirstName + LastName) over to the next step as default value:



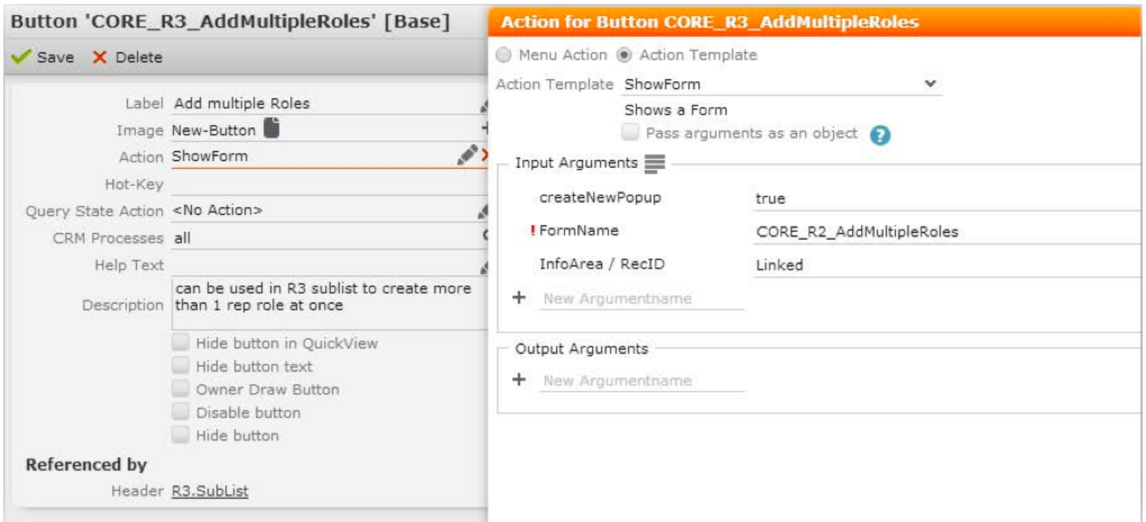
Furthermore we're setting some other default values by using the xml names:

In the step "CORE_ID_New_SelectRoles" we're using a special searchAndList with a special defaultAction and a special contextMenu. This action calls a javascript function which creates rep role records (R3) out of the selected login roles (R2).

In the action itself it is possible to set default values for the role (active flag, default flag)

After creating the roles for the rep we proceed with the step "ViewRecord->Exit" to display the rep record.

We created a new button "CORE_R3_AddMultipleRoles" which is used in the R3 sublist, to make it possible to create more than one rep role at once.



The button opens a form in a popup, displaying a special searchAndList. This is nearly the same functionality as in the process.

Used javascript for creating roles: “`\web\scripts\te.base\baserepprocess.js`”

Text (04)

To improve the speed during import of the cockpit packet this release does not contain the text for the data model and formats additionally saved in the text table (04). For information on how to translate your texts please follow the instructions in the customization guidelines.

4

Reporting

Learn about the various types of reporting supported in business solution template.

KPI Report

Learn how to call KPI reports.

There are two different types of KPI reports.

- CP based view - For SalesRX
- FI based view - For SalesOTC User

Callable from

As a RX user (with the TE_LSI_RxSales configuration): The KPI Report is called via menu entry ID_NET_QUERIES_AND_STATISTICS -> TE_ID_NET_REPORT_KPI_CP.

As an OTC user (with the TE_LSI_OTCSALES configuration): The KPI Report is called via menu entry ID_NET_QUERIES_AND_STATISTICS -> TE_ID_NET_REPORT_KPI_FI.

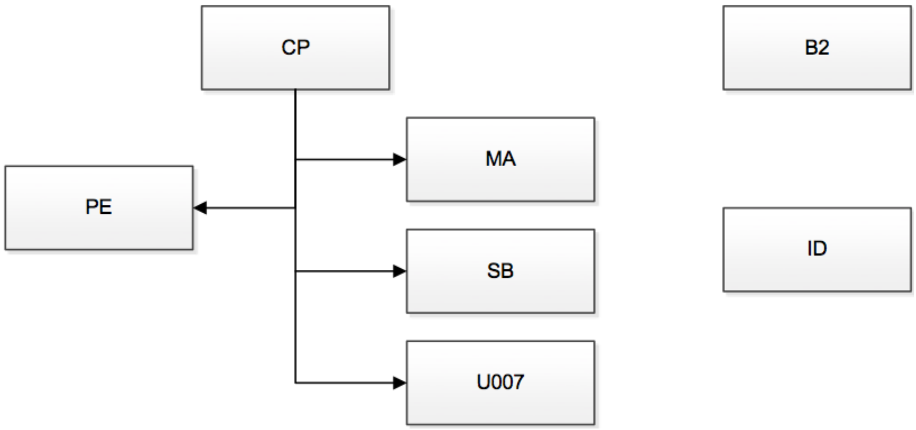
In the TE_LSI configuration both menu actions are defined and set to “invisible”. In the particular user configuration one of the context menu is set to “visible”.

Background info

In contrast to the old KPI report in u7 there are some basic and important changes. The report is based on U007 records. KPI records are valid for a certain period and are responsible for classification of the CP record. Only valid (this mean that the current date is in the period of the KPI records) are used in the report. Furthermore the report only use MA records which have a “Start date” within the “Start date” and “End date” of the KPI record.

Important: If there are two or more KPI records with the same “Start date” and “End date” (same period) and are linked to the same CP record, there are problems with displaying total lines in the report!

Data modell (XML Structure)



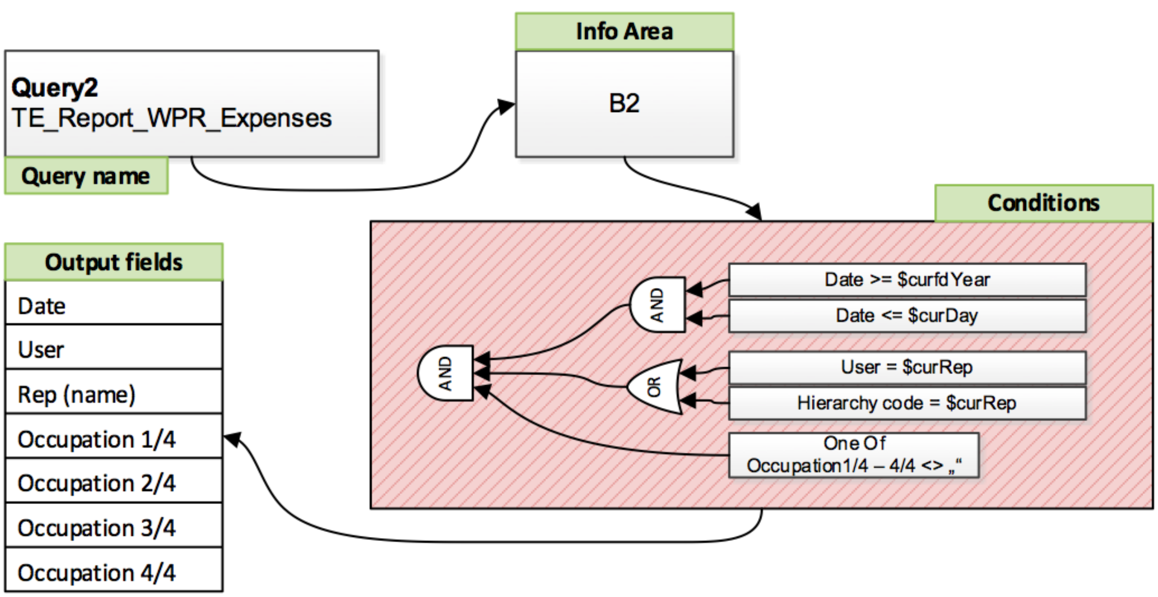
Javascript

This entry calls the javascript function *u8.TeLSI.Reports.doKpiReport($)* uses an action template (JavaScript) that calls the javascript file *\web\web\scripts\te.lsi\lsireports.js*.

Queries

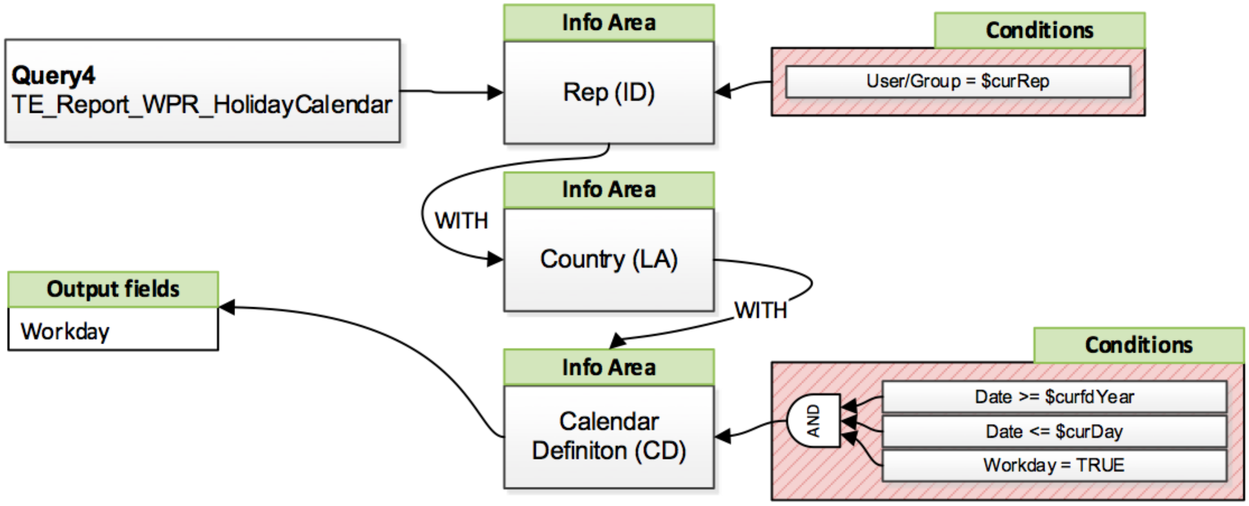
TE_Report_WPR_Expenses

This query is responsible for the expenses data in the report.



TE_Report_WPR_HolidayCalendar

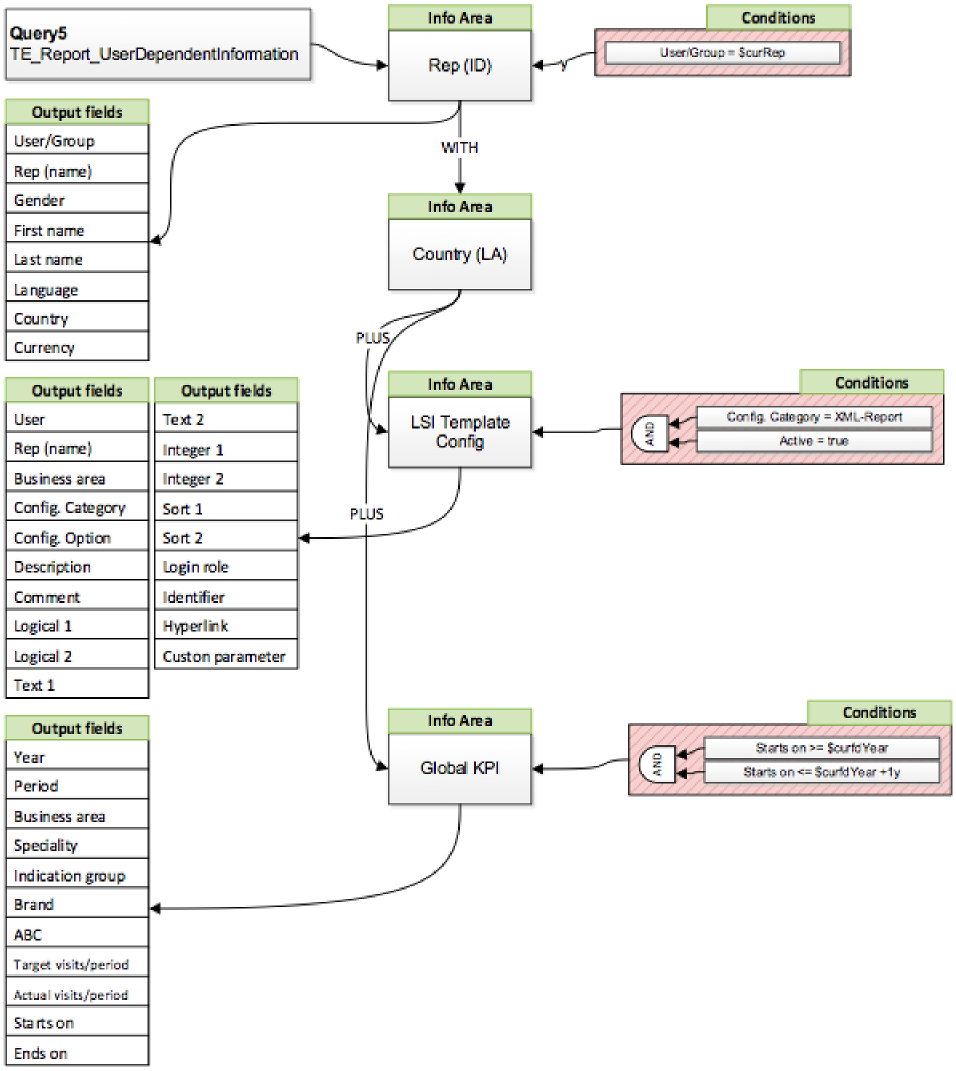
This query is responsible for the holiday and workday data in the report.



Attention: To get only the records for the appropriate language, the station right has to be changed for the info area CD (“bedingte Zugriffs-Sperre”). The condition that has to be set, links the CalendarId to that of the user, so any other calendar entry cannot selected. In the admin role, this condition is removed. This is done because there is no link between the involved info area.

TE_Report_UserDependentInformation

This query is responsible for user data in the report.



UI Overview

KPI Report for Ron Referent (9101)

	Workdays	Administration	Conference	Holiday	Meeting/Education	Others	Sick leave	Visit
Total	206	0,50	2,75	19,75	2,00	3,25	0,50	8,75

	Visits	Samples		Product Detailing		Tandem activity
-	0	0	0	0	0	0
A	0	0	0	0	0	0
B	0	0	0	0	0	0
C	0	0	0	0	0	0
D	0	0	0	0	0	0
E	0	0	0	0	0	0
Totals	0	0	0	0	0	0

Visits / Workday	0,00
Visit spread	
-	0,00%
A	0,00%
B	0,00%
C	0,00%
D	0,00%
E	0,00%

Targeted Doctors

No. of visits					0	1-4	5-7	8-12	13+
	Actual	Target	Ratio	No. of doctors					
-	0	0		0	0	0	0	0	0
A	0	0		0	0	0	0	0	0
B	0	0		0	0	0	0	0	0
C	0	0		0	0	0	0	0	0
D	0	0		0	0	0	0	0	0
E	0	0		0	0	0	0	0	0
Total	0	0		0	0	0	0	0	0

Totals View

	Workdays	Administration	Conference	Holiday	Meeting/Education	Others	Sick leave	Visit
Total	206	0,50	2,75	19,75	2,00	3,25	0,50	8,75
	1	2	3	4	5	6	7	8

Note: If there is no existing B2 record (and Occupations filled out) the coloumns Administration, Conference, Holiday, Meeting/Education, Others, Stick leave and Visit is not displayed.

Index	Description
1	This value shows the sum of all work days from currently logged in rep within the current year. Weekends and public holidays are not used in this calculation. Therefore in the example above there are only 206 workdays. It is necessary to add a calendar (ID/120) to the rep.
2	This value shows the workdays where the user entered “Administration” in his/her occupation report. Only record for the actual year is used for calculation! Values are used from the occupation management from B2 records. One day is split into 4 parts. It doesn’t matter if the occupation approval status from B2 is approved or not. Each records is used for calculation.
3	This value shows the workdays where the user entered “Conference” in his/her occupation report. Only record for the actual year is used for calculation! Values are used from the occupation management from B2 records. One day is split into 4 parts. It doesn’t matter if the occupation approval status from B2 is approved or not. Each records is used for calculation.
4	This value shows the workdays where the user entered “Holiday” in his/her occupation report. Only record for the actual year is used for calculation! Values are used from the occupation management from B2 records. One day is split into 4 parts. It doesn’t matter if the occupation approval status from B2 is approved or not. Each records is used for calculation.
5	This value shows the workdays where the user entered “Meeting/Education” in his/her occupation report. Only record for the actual year is used for calculation! Values are used from the occupation management from B2 records. One day is split into 4 parts. It doesn’t matter if the occupation approval status from B2 is approved or not. Each records is used for calculation.
6	This value shows the workdays where the user entered “Others” in his/her occupation report. Only record for the actual year ise used for calculation! Values are used from the occupation management from B2 records. One day is split into 4 parts. It doesn’t matter if the occupation approval status from B2 is approved or not. Each records is used for calculation.

Index	Description
7	This value shows the workdays where the user entered “Stick leave” in his/her occupation report. Only record for the actual year is used for calculation!
8	This value shows the workdays where the user entered “Visits” in his/her occupation report. Only record for the actual year is used for calculation! Values are used from the occupation management from B2 records. One day is split into 4 parts. It doesn’t matter if the occupation approval status from B2 is approved or not. Each records is used for calculation

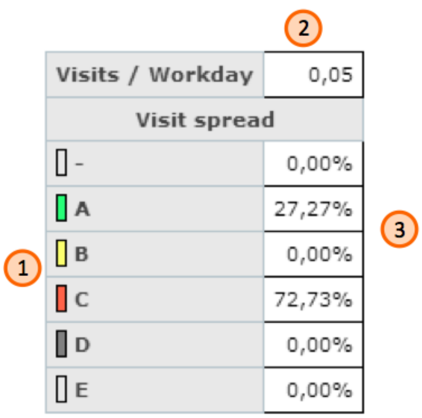
Activity View

		1	2	3	4	5	6
		Visits	Samples	Document Sample	Product Detailing	Medical Request	Tandem activity
	-	0	0	0	0	0	0
	A	3	1	0	1	0	0
	B	0	0	0	0	0	0
7	C	8	0	0	0	0	1
	D	0	0	0	0	0	0
	E	0	0	0	0	0	0
8	Totals	11	1	0	1	0	1

Index	Description
1	This value shows the total number of activities linked to a CP record (split by Classification – ABC field – of CP record) The report only use MA records which have a “Start date” within the “Start date” and “End date” of the KPI record. **Note:** Only if an activity is completed (manually or via Call Documentation procces) it is used for calculation)
2	This value shows the total number of activities linked to a CP record where the flag “Samples” is true. This flag is set by the trigger “TE_MA_UPD_Samples available”. This trigger set the flag to true if at least one sample was added to the activity via the Call Documentation process. **Note:** Only if an activity is completed (manually or via Call Documentation Process) is used for calculation)
3	This value shows the total number of activities linked to a CP record where the flag “Sample- Document” is true. This flag is set by the trigger “TE_MA_UPD_Set Sample Document Flag” (This trigger is implemented in TE_SR Template Main – LSI right in info area MA under triggers). This trigger set the flag to true, if at least one document record was added to the MA record. If a Document is added the field MA/38 is filled with “A-D1_StaNo-D1_SerNo” by the trigger “TE_MA_UPD_Fill Sample Document Field”. (This trigger is implemented in TE_SR Template Main – LSI right in info area D3 under triggers). **Note:** Only if an activity is completed (manually or via Call Documentation procces) is used for calculation)
4	This value shows the total number of activities linked to a CP record where the flag “Product Detailing” is true. This flag is set by the trigger “TE_MA_UPD_Product Detailing available”. This trigger set the flag to true if at least one product detailing record was added to the activity via the Call Documentation process. **Note:** Only if an activity is completed (manually or via Call Documentation Process) is used for calculation)

5	This value shows the total number of activities linked to a CP record where the flag “Product Detailing” is true. This flag is set by the trigger “TE_MA_UPD_Set Medical Request Flag” (This trigger is implemented in TE_SR Template Main – LSI right in info area KM under triggers). This trigger set the flag to true if at least one KM record was added to the activity via the Call Documentation process! **Note:** Only if an activity is completed (manually or via Call Documentation Process) is used for calculation)
6	This value shows the total number of activities linked to a CP record where the flag “Tandem activity” is true. This flag is set manually if a new MA record is created.
7	Classification from CP.
8	Total sum line

Activities / Workday View



Index	Description
1	Classification from CP.
2	This value shows the relation between completed activities and workdays from actual year. In the example above the rep has average 0,05 activities per workday. To bring this value to 1 or higher the rep needs at least equal amount of completed activities as workdays.
3	Drilled down by Classification.

Targeted Doctors View

No. of visits					0	1-4	5-7	8-12	13+
	Actual	Target	Ratio	No. of doctors					
-	0	0		0	0	0	0	0	0
A	2	10	20%	1	0	1	0	0	0
B	4	4	100%	2	0	2	0	0	0
C	6	7	86%	2	0	2	0	0	0
Angiology	4	5	80%	1	0	1	0	0	0
Mr. Nora Jones - Medical Assistant - Practice XYZ						4			
Children's Psychiatry	2	2	100%	1	0	1	0	0	0
Ms. Ina Baltes Super-Woman - Head of department - US Hospital Berlin						2			
D	0	0		0	0	0	0	0	0
E	0	0		0	0	0	0	0	0
Total	12	21	57%	5	0	5	0	0	0

XSLT

\web\web\data\reports\te.lsi\xslt\kpi_cp.xslt \web\web\data\reports\te.lsi\xslt\kpi_fi.xslt

The following other XSLT is referred for consistent formatting of output variables: \web\web\data\reports\te.lsi\xslt\TE_library.xslt.

The created html includes javascript code that refers the jquery library (../scripts/lib/jquery.min.js) and a utility javascript file (\web\web\scripts\te.lsi\utils.js).

In the XSLT, three info areas are expected in the XPath expressions: CD, PE and B2.

The new XSLT variable concept is used within this XSLT. The following variables have to be defined via WIN module in order to run this report properly and the proper texts have to be administrated in the – language dependent - description field:

TE_Reporttext_KPI.F5016

TE_Reporttext_KPI.F5017

TE_Reporttext_KPI.F5018

TE_Reporttext_KPI.F5019

TE_Reporttext_KPI.F5020

TE_Reporttext_KPI.F5021

TE_Reporttext_KPI.F5022

TE_Reporttext_KPI.F5023

TE_Reporttext_KPI.F5024

TE_Reporttext_KPI.F5025

TE_Reporttext_KPI.F5032

TE_Reporttext_KPI.F5033

TE_Reporttext_KPI.F5034

To open linked records, the utils.js javascript function openroot() is embedded. This function opens the default header for the given record and info area in a separate tab, if the function is called.

Order Summary

The new XSLT variable concept is used within this XSLT. The following variables have to be defined via WIN module in order to run this report properly and the proper texts have to be administrated in the – language dependent - description field:

TE_Reporttext_KPI.F5016

TE_Reporttext_KPI.F5017

TE_Reporttext_KPI.F5018

TE_Reporttext_KPI.F5019

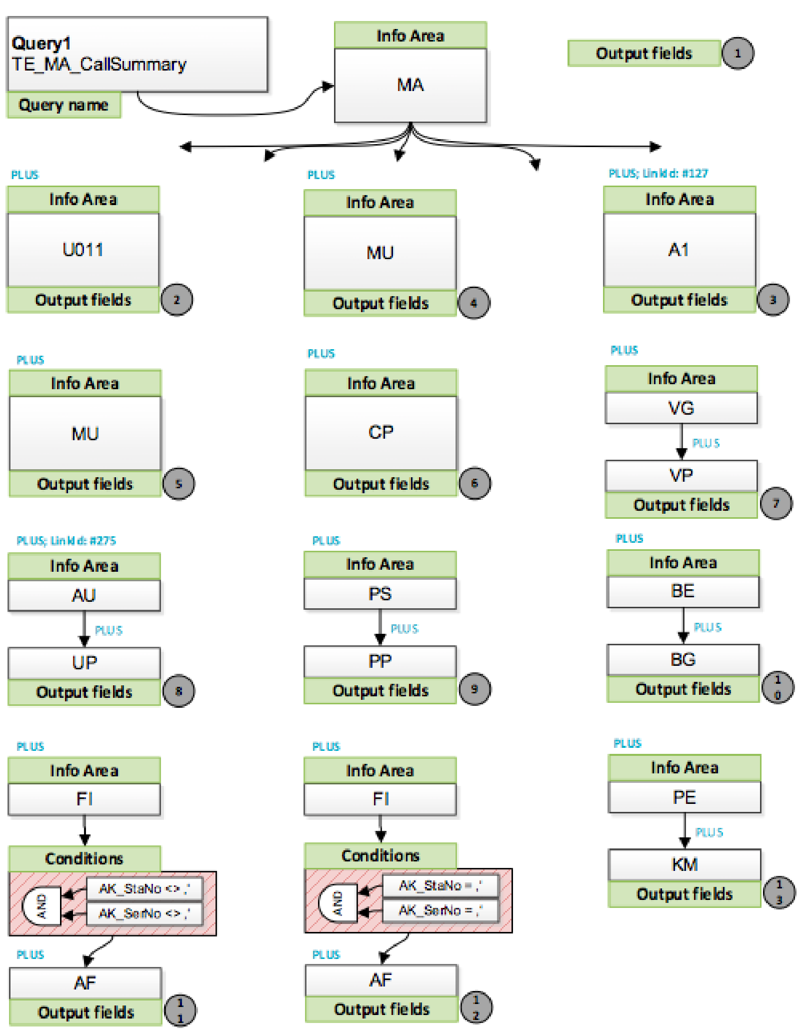
TE_Reporttext_KPI.F5020

TE_Reporttext_KPI.F5021

Call Summary

Basically there is one big designer query which is used for createing the xml for the XSLT report.

TE_MA_CallSummary



The new XSLT variable concept is used within this XSLT. The following variables have to be defined via WIN module in order to run this report properly and the proper texts have to be administrated in the – language dependent - description field:

TE_Reporttext_KPI.F5016

TE_Reporttext_KPI.F5017

Organigram

An organizational chart ("Organigram") can be displayed for all kinds of accounts.

The report contains e.g. the individual hospital units and the respective contact persons. Prerequisite for displaying these units are relations of the relationship category Hospital Structure between the units or the units and the account.

The button TE_FI_Organigram is calling action QueryReport with query TE_Report_FI_Organigram and is using the XSLT TE_FI_Organigram.xslt.

The variable TE_Reporttext_FI_Organigram.TabName is used as title text for the new window.

Sunshine Act (1.4.7.402)

Learn about the Sunshine Act and its reporting in business solution template.

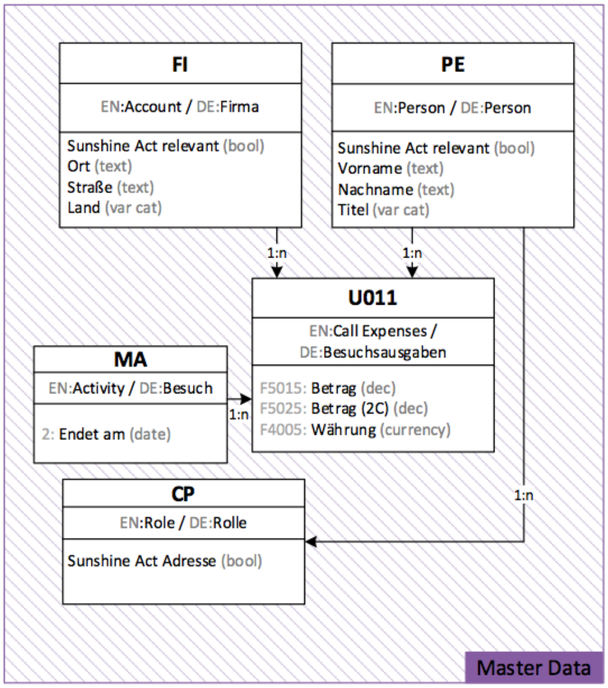
Highlights of EFPIA Sunshine Act:

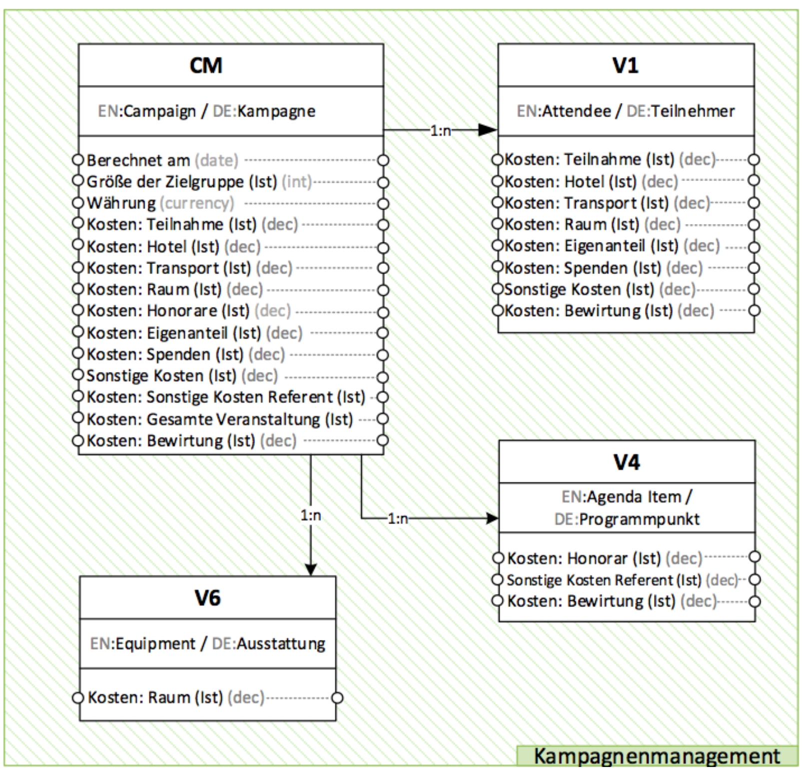
- As of 2015, the European Federation of Pharmaceutical Industries and Associations requires all transfers of value to healthcare professionals and healthcare organizations to be documented and disclosed
- The data in the report (e.g. sponsorship agreements, registration fees) are taken from a variety of areas (e.g. call expenses, event participants, information on clinical trials).
- Back office staff can edit the data in the corresponding areas and then generate the data included in the report anew.

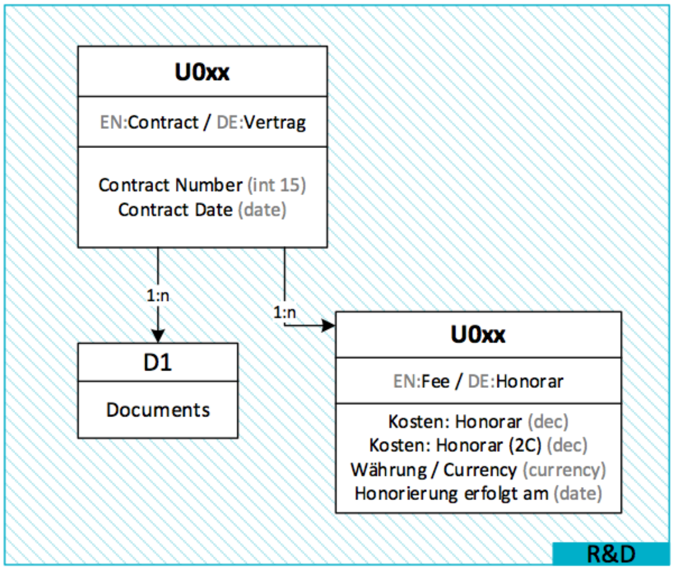
	Name	City	Country	Street	Donation & Grants	Contribution to costs of Events: Sponsorship agreements	Contribution to costs of Events: Registration Fees	Contribution to costs of Events: Travel & Accommodation	Fee for service and consultancy: Consulting Fees	Fee for service and consultancy: Consulting: Related Expenses	Research & Development	Total
	INDIVIDUAL NAMED DISCLOSURE - one line per HCP											
HCP	1 Sunshine	Wien 1010	Austria	Sonnenscheinallee 1			1,000.00	11,900.00			1,000.00	**13,900.00**
HCP	2 Sunshine	Wien 1020	Austria	Sonnenscheinallee 2			2,000.00	19,900.00			2,000.00	**23,900.00**
HCP	3 Sunshine	Wien 1030	Austria	Sonnenscheinallee 3			3,000.00	24,900.00			3,000.00	**30,900.00**
HCP	4 Sunshine	Wien 1040	Austria	Sonnenscheinallee 4			4,000.00	29,900.00			4,000.00	**37,900.00**
HCP	5 Sunshine	Wien 1050	Austria	Sonnenscheinallee 5			5,000.00	37,900.00			5,000.00	**47,900.00**
HCP	6 Sunshine	Wien 1060	Austria	Sonnenscheinallee 6			6,000.00	42,900.00	6,000.00	6,000.00		**60,900.00**
HCP	7 Sunshine	Wien 1070	Austria	Sonnenscheinallee 7			7,000.00	47,900.00				**54,900.00**
HCP	8 Sunshine	Wien 1080	Austria	Sonnenscheinallee 8			8,000.00	37,900.00				**45,900.00**
HCP	9 Sunshine	Wien 1090	Austria	Sonnenscheinallee 9			9,000.00	33,900.00				**42,900.00**
HCP	10 Sunshine	Wien 1100	Austria	Sonnenscheinallee 10			10,000.00	29,900.00				**39,900.00**
	INDIVIDUAL NAMED DISCLOSURE - one line per HCO											
HCO	SunshineFirma 0001	Wien 1010	Austria	Sonnenscheinallee 1	14,000.00			22,000.00	1,000.00	1,000.00		**38,000.00**
HCO	SunshineFirma 0002	Wien 1020	Austria	Sonnenscheinallee 2	14,000.00			28,000.00	2,000.00	2,000.00		**46,000.00**
HCO	SunshineFirma 0003	Wien 1030	Austria	Sonnenscheinallee 3	14,000.00			16,000.00	3,000.00	3,000.00		**36,000.00**
	SunshineFirma			Sonnenscheinallee								

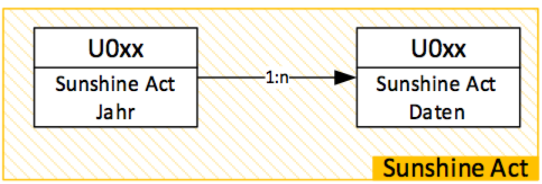
Note: A complete test dataset for Sunshine Act is available on request.

Datamodel

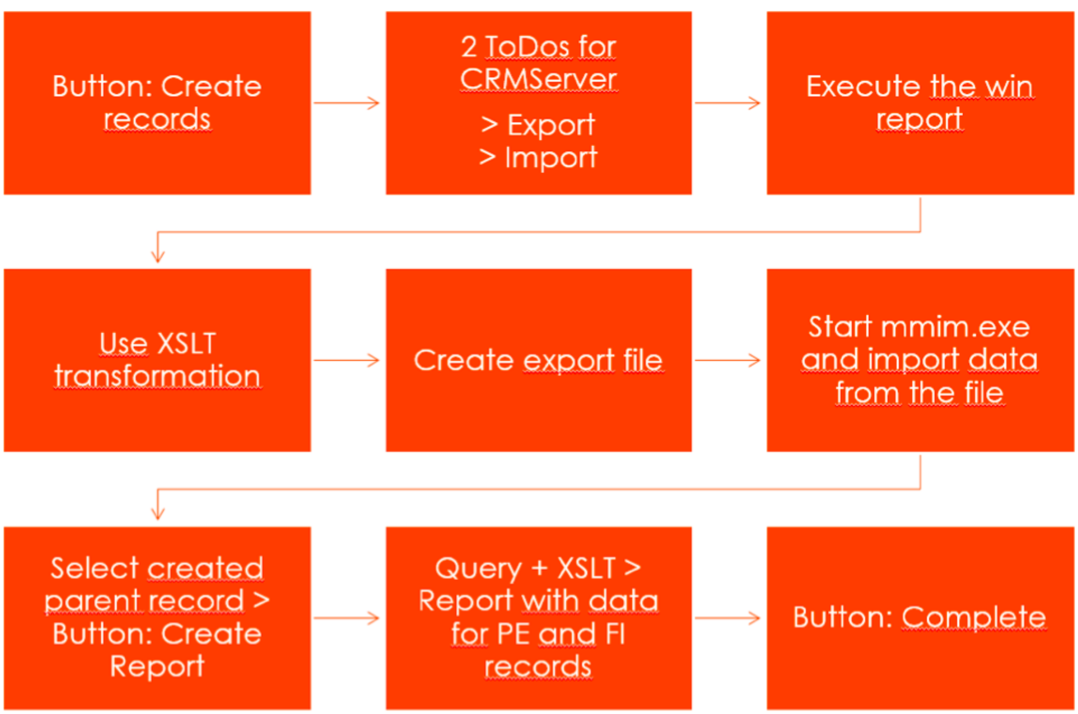

FI
EN:Account / DE:Firma
Sunshine Act relevant (bool)
Ort (text)
Straße (text)
Land (var cat)
PE
EN:Person / DE:Person
Sunshine Act relevant (bool)
Vorname (text)
Nachname (text)
Titel (var cat)
1:n
1:n
U011
EN:Call Expenses / DE:Besuchsausgaben
F5015: Betrag (dec)
F5025: Betrag (2C) (dec)
F4005: Währung (currency)
MA
EN:Activity / DE:Besuch
2: Endet am (date)
1:n
CP
EN:Role / DE:Rolle
Sunshine Act Adresse (bool)
1:n
Master Data


CM
EN:Campaign / DE:Kampagne
Berechnet am (date)
Größe der Zielgruppe (Ist) (int)
Währung (currency)
Kosten: Teilnahme (Ist) (dec)
Kosten: Hotel (Ist) (dec)
Kosten: Transport (Ist) (dec)
Kosten: Raum (Ist) (dec)
Kosten: Honorare (Ist) (dec)
Kosten: Eigenanteil (Ist) (dec)
Kosten: Spenden (Ist) (dec)
Sonstige Kosten (Ist) (dec)
Kosten: Sonstige Kosten Referent (Ist)
Kosten: Gesamte Veranstaltung (Ist)
Kosten: Bewirtung (Ist) (dec)
1:n
V1
EN:Attendee / DE:Teilnehmer
Kosten: Teilnahme (Ist) (dec)
Kosten: Hotel (Ist) (dec)
Kosten: Transport (Ist) (dec)
Kosten: Raum (Ist) (dec)
Kosten: Eigenanteil (Ist) (dec)
Kosten: Spenden (Ist) (dec)
Sonstige Kosten (Ist) (dec)
Kosten: Bewirtung (Ist) (dec)
1:n
1:n
V4
EN:Agenda Item / DE:Programmpunkt
Kosten: Honorar (Ist) (dec)
Sonstige Kosten Referent (Ist) (dec)
Kosten: Bewirtung (Ist) (dec)
V6
EN:Equipment / DE:Ausstattung
Kosten: Raum (Ist) (dec)
Kampagnenmanagement





Technical flowchart



Button “TE_U066_CurrentYear” and “TE_U066_PreviousYear” calls a JavaScript function with callback. JS Function: u8.TeLSI.SunshineAct.execute($)

Furthermore there are two parameters which are given to the function.

TE_U066_PreviousYear		TE_U066_CurrentYear	
importFormat	TE_IMP_SunshineAct	**importFormat**	TE_IMP_SunshineAct
reportName	TE_LSI_SunshineActReport_PreviousYearYear	**reportName**	TE_LSI_SunshineActReport_CurrentYear

Within the JS function two TD records are created.

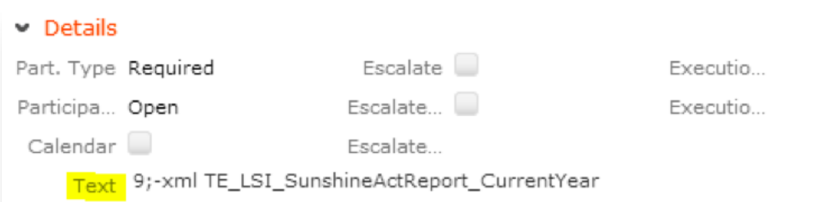
u8Server and TD records

JS file lsisunshineact.js with function u8.TeLSI.SunshineAct.execute.

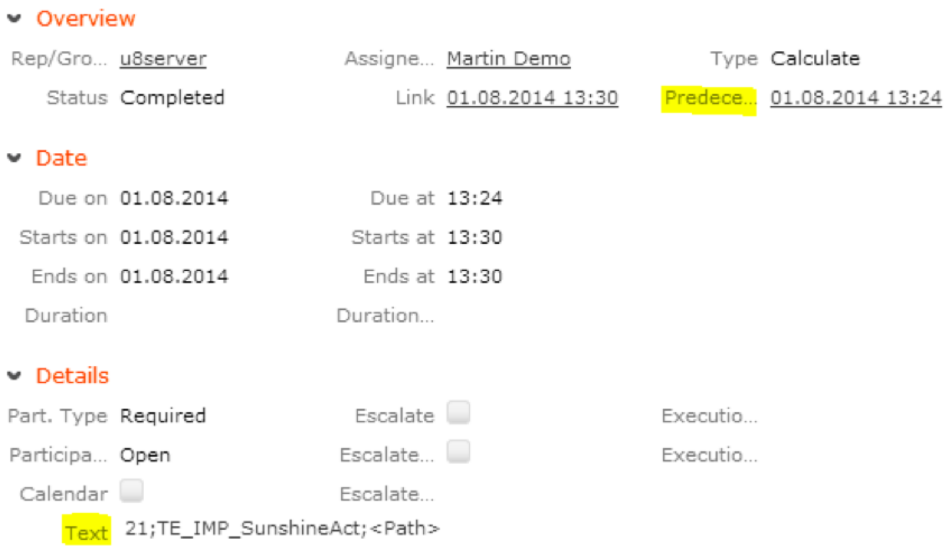
Via CRUD service two TD records are created. Via the parameters in “Text” field the u8server knows what to do. The second TD record depends on the status of the first TD record. Only if the first one is set to completed by the u8server, the second TD record is processed by the u8server.

First TD record is responsible for handling the WIN report and the export to the output file. The second TD record is responsible for handling the import of records which was created by the first TD.

First TD record:



Second TD record:



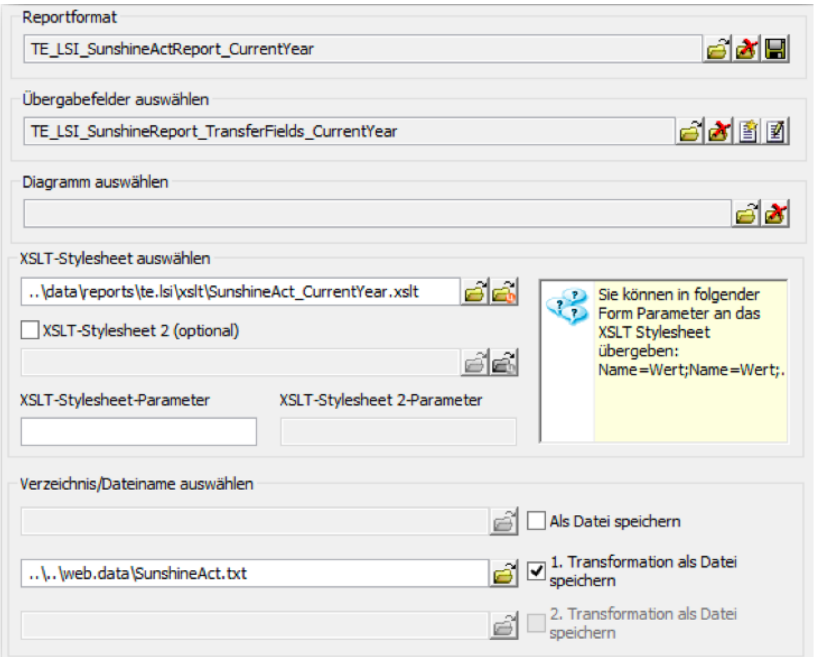
Both, the export and the import, use following path for the output / input file:

- **“web/web.data”**
- File name: sunshineact.txt

WIN Report and Transfer fields

Sunshine Act data is generated based on a WIN report. The content structure of the output file is defined by the selected XSLT. There are two reports, one for the current year and one for the previous year.

- TE_LSI_SunshineActReport_CurrentYear
- TE_LSI_SunshineActReport_PreviousYear



The file paths based on the root directory of the u8server. (web\bin) Form there file paths in the WIN report can be specified relative.

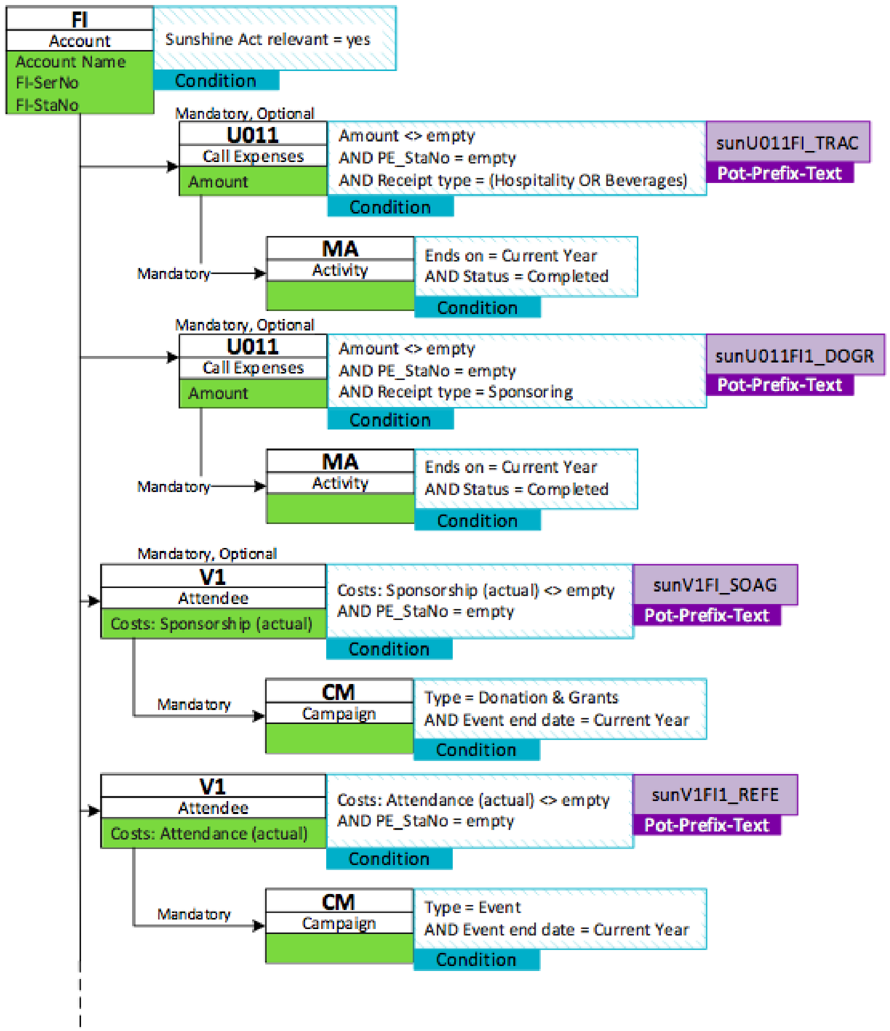
Note: With these file paths you cannot start the report via Aurea CRM WIN module.

Transfer field definitions

In transfer field definition all infoareas and filters are defined. With different dependencies fields (and there values) is selected from certain infoareas.

There are two definitions, one for the current year and one for the previous year.

- TE_LSI_SunshineReport_TransferFields_CurrentYear
- TE_LSI_SunshineReport_TransferFields_PreviousYear



Important: IMPORTANT: If you want to use a field later in the sunshine act report, you have to use prefix texts. For example there is the prefix “sunU011FI_TRAC” to add the value of these fields in the “Travel and Accommodation” pot.

Prefix Overview:

_TRAC > Travel & Accommodation (U066, FId: 5003)

_DOGR > Donation & Grants (U066, FId: 5004)

_REFE > Registration Fees (U066, FId: 5005)

_COFE > Consulting Fees (U066, FId: 5006)

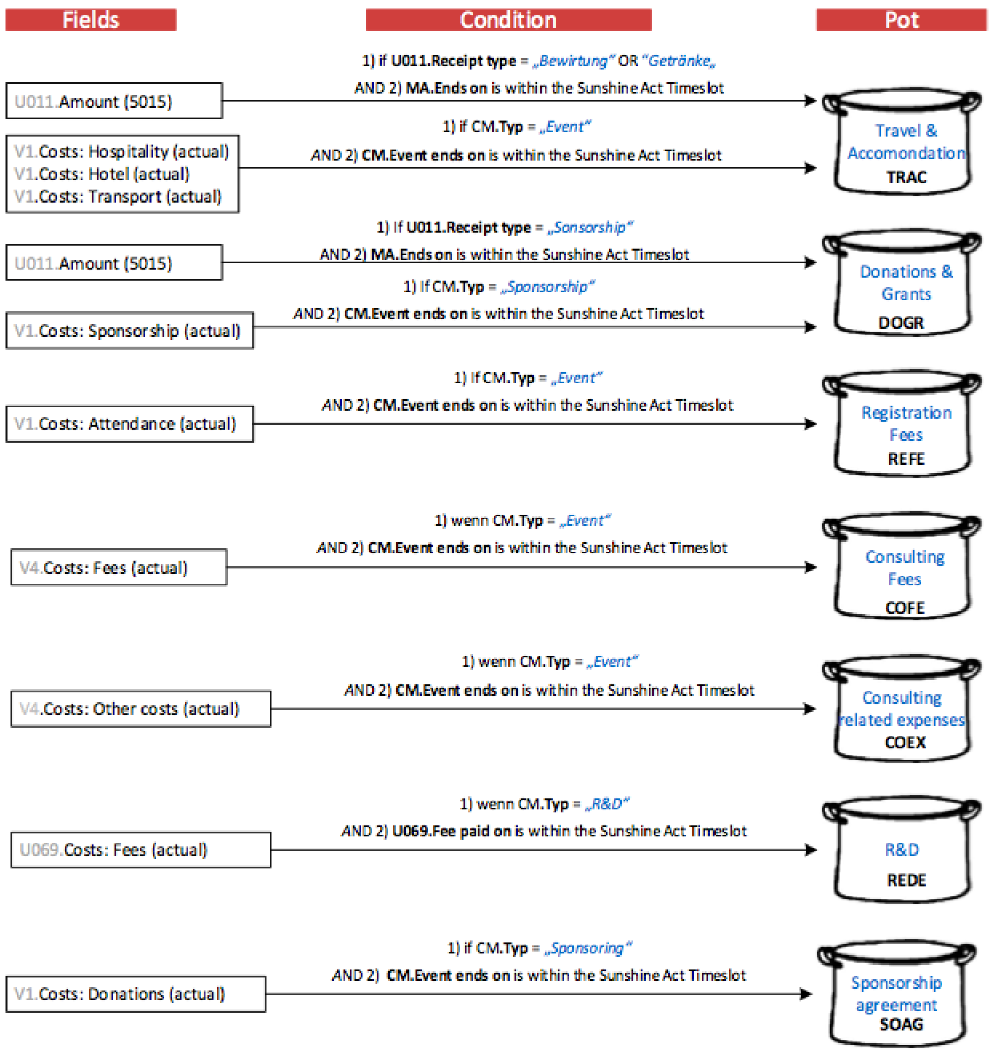
_COEX > Consulting related expenses (U066, FId: 5007)

_REDE > Research & Development (U066, FId: 5008)

_SOAG > Sponsorship agreements (U066, FId: 5002)

Sunshine Act “Pots”

Pot prefix texts is used in further XSLT to sum up values from the same „type“.



XSLT transformation

The report exports data to a file based on the structure given by the XSLT. File-Path: **web\data\reports\te.lsi\xslt**

There are also a file for current year and previous year.

- SunshineAct_CurrentYear.xslt
- SunshineAct_PreviousYear.xslt

```
<xsl:value-of select="$SEPERATOR"/>
<!--Find all values with prefix containing "COFE" and sum them up + Seperator-->
<xsl:call-template name="OutputCurr">
  <xsl:with-param name="field"  select="sum($curr_FI/tables/table[contains(@prefix, 'COFE')]/field)"/>
</xsl:call-template>
<xsl:value-of select="$SEPERATOR"/>
<!--Find all values with prefix containing "COEX" and sum them up + Seperator-->
<xsl:call-template name="OutputCurr">
  <xsl:with-param name="field"  select="sum($curr_FI/tables/table[contains(@prefix, 'COEX')]/field)"/>
</xsl:call-template>
```

With xslt sum function and contains – filter all fields with the same prefix text is summed up. $seperator is the separator for CSV structure = Pipe (|)

Report – Output TXT File

Records have the same ID

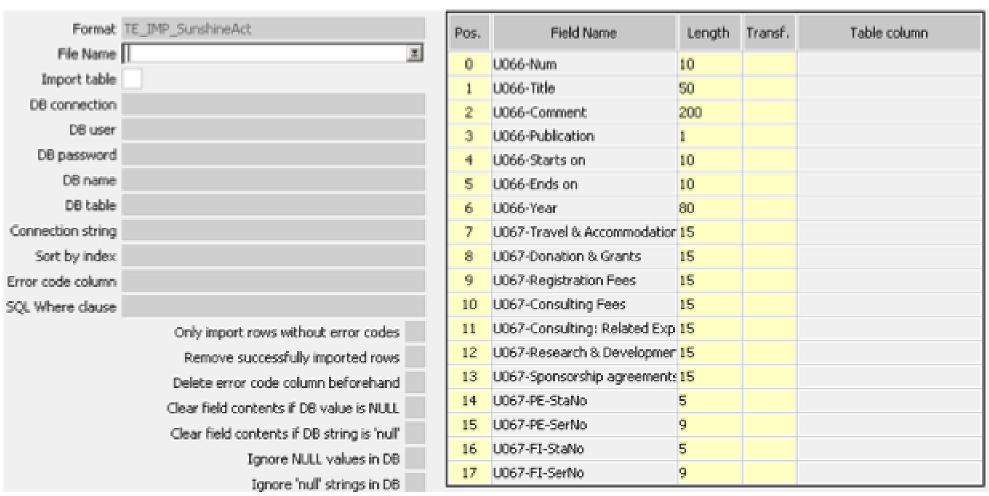
```
5|Sunshine Act 2014|||20140101|20141231|2014|200,00|0,00|50,00|0,00|0,00|0,00|0,00|||10002|14|
5|Sunshine Act 2014|||20140101|20141231|2014|378,00|0,00|99,00|500,00|0,00|0,00|0,00|10002|37|||
5|Sunshine Act 2014|||20140101|20141231|2014|0,00|0,00|0,00|777,00|777,00|0,00|0,00|10002|16855|||
5|Sunshine Act 2014|||20140101|20141231|2014|0,00|0,00|0,00|0,00|0,00|0,00|0,00|10002|80195|||
5|Sunshine Act 2014|||20140101|20141231|2014|99,00|0,00|99,00|0,00|0,00|0,00|0,00|10002|80276|||
5|Sunshine Act 2014|||20140101|20141231|2014|508,00|0,00|242,00|0,00|0,00|0,00|0,00|10002|80338|||
5|Sunshine Act 2014|||20140101|20141231|2014|42,00|0,00|99,00|0,00|0,00|0,00|0,00|10002|80367|||
5|Sunshine Act 2014|||20140101|20141231|2014|50,00|0,00|0,00|0,00|0,00|0,00|0,00|10002|80401|||
5|Sunshine Act 2014|||20140101|20141231|2014|139,00|0,00|99,00|0,00|0,00|0,00|0,00|10002|80403|||
5|Sunshine Act 2014|||20140101|20141231|2014|0,00|0,00|59,00|0,00|0,00|0,00|0,00|10002|109147|||
5|Sunshine Act 2014|||20140101|20141231|2014|0,00|0,00|99,00|0,00|0,00|0,00|0,00|10002|109148|||
5|Sunshine Act 2014|||20140101|20141231|2014|49,00|0,00|0,00|0,00|0,00|0,00|0,00|10002|109150|||
5|Sunshine Act 2014|||20140101|20141231|2014|38,00|0,00|0,00|0,00|0,00|0,00|0,00|10002|109276|||
5|Sunshine Act 2014|||20140101|20141231|2014|0,00|0,00|49,00|0,00|0,00|0,00|0,00|10002|109360|||
5|Sunshine Act 2014|||20140101|20141231|2014|159,00|0,00|0,00|0,00|0,00|0,00|0,00|10002|109408|||
5|Sunshine Act 2014|||20140101|20141231|2014|0,00|0,00|49,00|0,00|0,00|0,00|0,00|10002|109420|||
5|Sunshine Act 2014|||20140101|20141231|2014|59,00|0,00|0,00|0,00|0,00|0,00|0,00|10002|109421|||
5|Sunshine Act 2014|||20140101|20141231|2014|0,00|0,00|99,00|0,00|0,00|0,00|0,00|10002|109422|||
```

The output file includes following sunshine act data fields:

ID, Title, Starts on, Ends on, Year, different pots,FI-StaNo, FI-SerNo, PE-StaNo, PE-SerNo

WIN Import

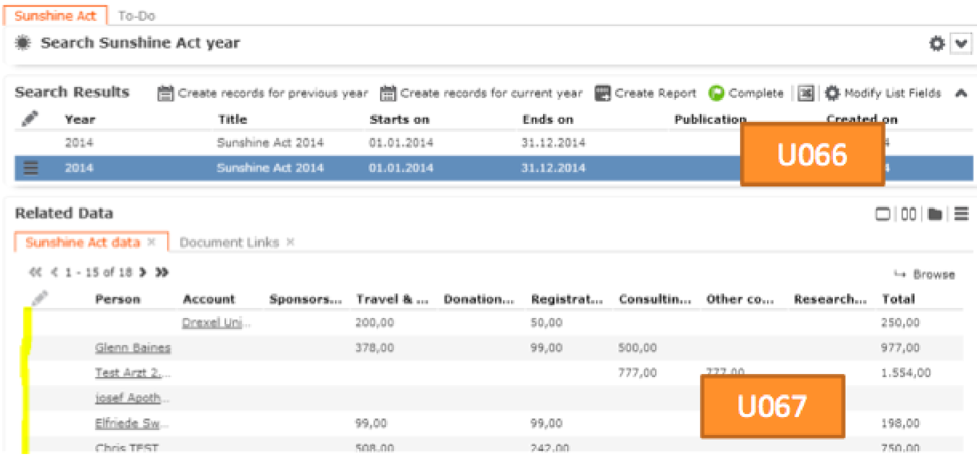
Field U066-Num is the unique index (id) to achieve that only ONE U066 record is created. Depending on the lines in the import file dependent U067 records is created and linked to exactly this U066 record.



Pos.	Field Name	Length	Transf.	Table column
0	U066-Num	10		
1	U066-Title	50		
2	U066-Comment	200		
3	U066-Publication	1		
4	U066-Starts on	10		
5	U066-Ends on	10		
6	U066-Year	80		
7	U067-Travel & Accommodatior	15		
8	U067-Donation & Grants	15		
9	U067-Registration Fees	15		
10	U067-Consulting Fees	15		
11	U067-Consulting: Related Exp	15		
12	U067-Research & Developmer	15		
13	U067-Sponsorship agreements	15		
14	U067-PE-StaNo	5		
15	U067-PE-SerNo	9		
16	U067-FI-StaNo	5		
17	U067-FI-SerNo	9		

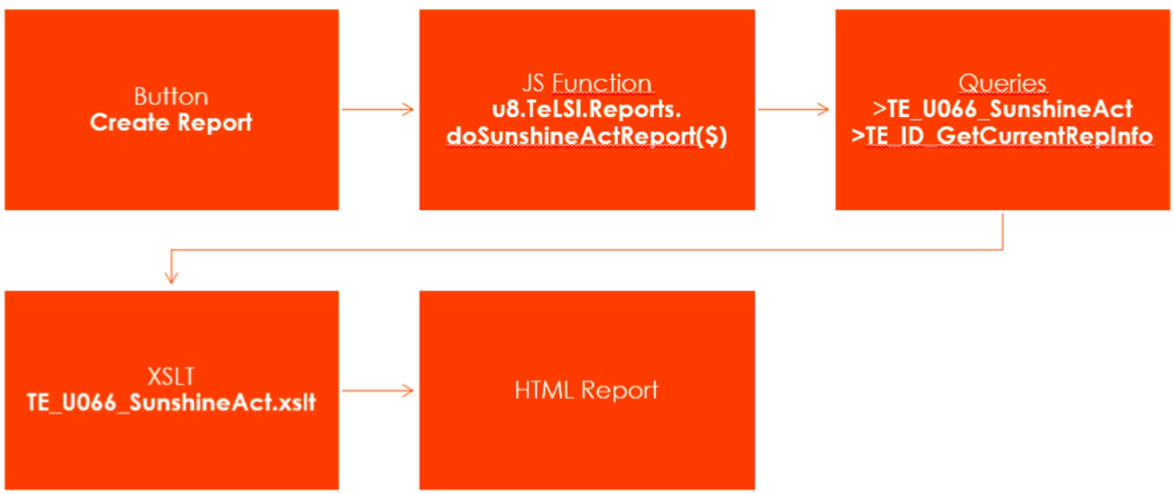
The import is started by the CRMserver based on the second TD record which was created before.

Sunshine Act Data



Create report

Technical flowchart



Button

- TE_U066_CreateReport

  Calls the JS function u8.TeLSI.Reports.doSunshineActReport($)

  Uses the queries TE_U066_SunshineAct and TE_ID_GetCurrentRepInfo

  Uses the XSLT file TE_U066_SunshineAct.xslt

- TE_U066_SetToComplete

  Calls the trigger TE_U066_CompleteSunshineActReport and set the field “Publication” of the selected record to “true”. After this “Status” change, the record cannot be deleted anymore.

Queries

- TE_U066_SunshineAct
- TE_ID_GetCurrentRepInfo

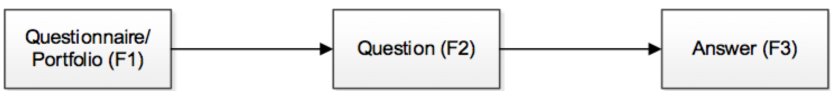
Questionnaire & Survey

Learn how to add and edit questionnaire.

Within the admin menu there is the possibility to add and edit questionnaires. If there are questionnaires defined there is the possibility to start surveys. The entry points for starting such a survey is the context menu action “D_Questionaire” in Info area MA. (MA search and expand)

Administration - questionnaires

Data model



Adding questionnaires

3. Within the Key Account Management

While creating Job Cards there is the record selector for selecting existing questionnaires. This is the field “Questionnaire (AD/53)” in field group “TE_AD_JobCards”.

4. Within an activity.

While creating an activity record there is a record selector for adding existing questionnaires to an MA record. This is the field “questionnaire (MA/46)” in field group “MA”.

Utility functions

Learn how to open a linked record with the default expand header using utility function.

lsiutils.js

The utils.js file is located at \web\web\scripts\te.lsi and contains convenience and helper functions e.g. for showing the default expand view for an info area. In the XSLT documents, javascript code is embedded to the html output.

With this methods it is possible to open a linked record with the default expand header when calling the function openRoot (table, id), that internally calls the javascript function window.top.u8.TeLSI.Utils.TE_ReadRecordValuesForOpeningIn-View(table, id).

5

Various

Learn about the miscellaneous features of business solution template.

Cascading Style Sheets (CSS)

You get three stylesheets as part of the Business solution template.

Below are the 3 style sheets that you get:

- 1.styles\te.base\update.css
- 2. styles\te.base\custom-color_Example.css
- 3.styles\te.isi\update.css

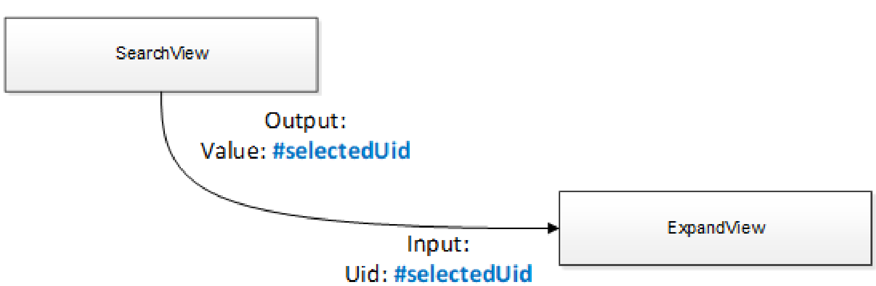
To make modifications or additions to the styles please rename the custom-color_example.css from the “te.base” directory to custom-color.css. This file is not overwritten during an upgrade.

Search Forms

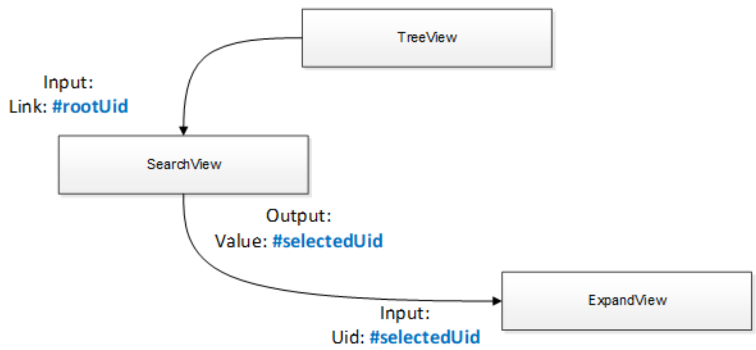
It is a form which is called from each application menu search.

Within the search form there is a SearchView Widget and an ExandView Widget.

The selected record’s uid is passed to the expand view.



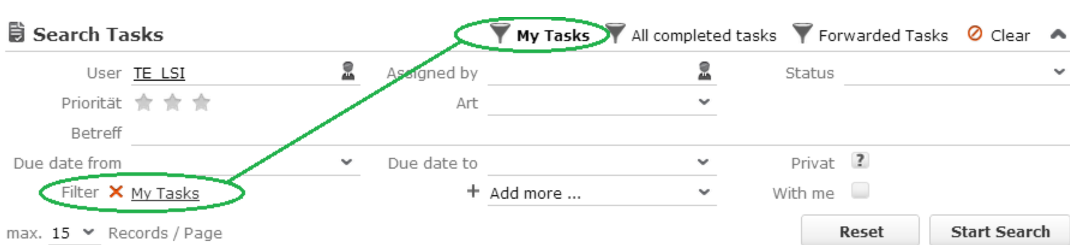
If such a form is used in a treeview an additional parameter in the SearchView Widget has to be filled:



Filter buttons

You can use all defined filter in designer as filters in web search in certain info area. Filter button functionality allows you to use all defined filter as buttons in Search header.

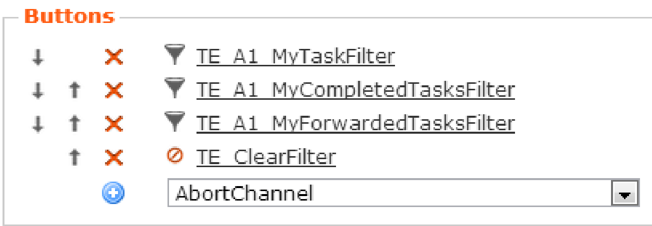
If you click a button the filter in the search is added automatically and executes the search immediately. Furthermore the Button text is displayed in bold. If you click the Clear button all filters are removed and all filter button texts are set to not bold.



Action Template “TE_SearchViewHeader_AddFilter”

This template calls the JS function “u8.TeLSI.Filters.SetFilter_Header_NEW”.

To use this action template in designer with a button this template has to be selected behind the button.



- **Function call “filter button”**

  Attributes:

  `FilterName` - The name of an filter defined in Designer Configuration. This filter is added to search after pushing the filter button in web.

  `ButtonName` - The name of the button which calls the JavaScript function. This name is needed to set and unset the bold attribute to specific button if the filter is active.

  `Header` - Due to the fact that there can be more than 1 header on 1 page you have the possibility to assign in which header the filter button is used. In most cases this attribute is “0”.

  Syntax: `u8.TeLSI.SetFilter_Header(FilterName[s],ButtonName[s],Header[i])`

  Example:

  `u8.TeLSI.SetFilter_Header("A1.MyTasks","TE_A1_MyTaskFilter",0)`

- **Function call “clear button”**

  To each filter button set you should provide a clear button which clears the assigned filter and set all filter button texts in web to not bold.

  Syntax: `u8.TeLSI.SetFilter_Header("clear","clear",0)`

Java Script function “SetFilter_Header”

```
SetFilter_Header: function(filterName, buttonName, x) {

    //get the number of headers on the page
    var sum_header = $u(".Header").length;
        var header = sum_header - 2;

    //get the number of filter buttons in the header ( -1 because of the clear
button )
        var counter = $u(".Header")[header].getItems({ tag: "buttons" }).length;

    //clear button
        if(filterName == "clear"){
            $u(".SearchForm")[x].clear();
            $u(".SearchForm")[x].execute();
            for(var i = 0; i < counter-1; i++){
                $$($u(".Header")[header].getItems({ tag: "buttons"
})[i].element).css("font-weight","");
            }
        }else{
            $u(".SearchForm")[x].addFilter(filterName);
            for(var i = 0; i < counter-1; i++){
                $$($u(".Header")[header].getItems({ tag: "buttons"
})[i].element).css("font-weight","");
            }

$$($u(".Header")[header].getItem(buttonName).element).css("font-weight","bold");
        }
    }
```

NewCommand

Action: Command - New

Query state aaction: CORE_C_CanNew_disabled

CORE_NewRecord_Close

Action: ExpandNew

Query state action: CORE_C_CanNew_disabled

KP reconstruction

With the new Aurea CRM trinity functionality, the old formats and elements in info area KP needs to be corrected.

Due to the new data model structure and the data model mapping from KP to CP or PE, we want to achieve to never use KP info area in logic or elements again.

Analysis

In this topic you can find the list of triggers and workflows for KP info area.

Trigger Formats (all formats include info area KP)

The following list shows all triggers, which includes the info area KP. Based on this list new triggers were created and old triggers where marked with “not used anymore”.

Trigger Name	Info area	References	SR	Cockpit	TE_LSI
TE_KP_DEL_KP	Delete potential/intimacy/classification from KPI		yes	yes	no
TE_KP_DV_CKP	Contact		yes	yes	no
TE_KP_UPD_KP	All ABC from Portfolio		no	yes	no
TE_KP_UPD_KP	CalculateCurrentYear		no	yes	no
TE_KP_UPD_KP	Call WFCalculateIntimacy/Potential		yes	yes	no
TE_KP_UPD_KP	Create Contact Key		yes	yes	no
TE_KP_UPD_KP	Dummy update for checking block sampling flag		yes	yes	no
TE_KP_UPD_KP	Fill ABC from Classification		yes	yes	no
TE_KP_UPD_KP	Fill potential/intimacy/classification from KPI	U007	yes	yes	no
TE_KP_UPD_KP	Gender		yes	yes	no

Trigger Name	Info area	References	SR	Cockpit	TE_LSI
TE_KP_UPD_Last Call/Visit	KP	MA	yes	yes	no
TE_KP_UPD_Link to Main - Delete	KP		no	yes	no
TE_KP_UPD_Set Block flags	KP		yes	yes	no
TE_KP_UPD_Set Block MedRequest flag based on Account setting	KP		yes	yes	no
TE_KP_UPD_Set Block Sampling flag based on Account setting	KP		yes	yes	no
TE_KP_UPD_Set Block Sampling Flag due to no State licence No	KP		yes	yes	no
TE_KP_UPD_Set Opinion Leader Flag	KP		yes	yes	no
TE_KP_UPD_Set Pool Clearing state ForValidation	KP		yes	yes	no
TE_KP_UPD_Street	KP		yes	yes	no
TE_KP_UPD_Sum Call Expenses per current Year	KP	MB	yes	yes	no

Trigger Name	Info area	References	SR	Cockpit	TE_LSI
TE_KP_UPD_Update Contact Status	KP		yes	yes	no
TE_KP_UPD_Update Contact Type	KP		yes	yes	no
TE_U007_UPD_Contact Actual Visits/Year	U007	MA, KP	yes	yes	no
TE_U007_UPD_Contact Actual Visits/Year/Business Area	U007	MA, KP	yes	yes	no

Workflow Formats (all formats include info area KP)

The following list shows all workflows, which includes the infoarea KP. Based on this list new workflows were created and old workflows where marked with “not used anymore”.

Workflow Name	SR	Cockpit	TE_LSI	Comment
CORE_ID_RevLogin_AddPersonToRep	no	no	yes	
TE_Account Manager - Fill Target Visits	no	no	yes	Not used anymore! Replaced with workflow “TE_KPI - Fill Target Visits”
TE_Calc Visits/Year - Person	yes	no	yes	
TE_Call_Samples fast entry	no	no	yes	Not used anymore!

Workflow Name	SR	Cockpit	TE_LSI	Comment
TE_KP_Calculate_Intimacy_Potential_For_KPI	yes	no	yes	Not used anymore!
TE_KP_Calculate_Intimacy_Potential_For_KPI_ProductVersion	yes	no	yes	Not used anymore!
TE_KPI - Fill Target Visits	no	no	yes	
TE_Person - Link to Main	no	no	yes	Not used anymore!
TE_Person - Link to Main - Delete	yes	no	yes	Not used anymore!
TE_Portfolio - Update other info areas	no	no	yes	Not used anymore!
TE_Route Planning - Route Member from Person	no	no	yes	

Trigger – Station Right

The following list shows all triggers in SR (station right), which includes the infoarea KP. Based on this list new triggers were created and old triggers where marked with “not used anymore”.

Info area	Trigger Name	NEW	UPDATE	DELETE
U007	TE_KP_DEL_Delete potential/intimacy/classification from KPI			TRUE
KP	TE_KP_DV_Contact	TRUE		

Info area	Trigger Name	NEW	UPDATE	DELETE
IT	TE_KP_UPD_Call-WFCalculateIntimacy/Potential	TRUE	TRUE	TRUE
KP	TE_KP_UPD_Create Contact Key	TRUE		
MA	TE_KP_UPD_Dummy update for checking block sampling flag		TRUE	
KP	TE_KP_UPD_Fill ABC from Classification	TRUE	TRUE	
U007	TE_KP_UPD_Fill potential/intimacy/classification from KPI	TRUE	TRUE	
KP	TE_KP_UPD_Gender	TRUE	TRUE	
MA	TE_KP_UPD_Last Call/Visit	TRUE	TRUE	TRUE
KP	TE_KP_UPD_Set Block flags	TRUE	TRUE	
FI	TE_KP_UPD_Set Block MedRequest flag based on Account setting		TRUE	
FI	TE_KP_UPD_Set Block Sampling flag based on Account setting		TRUE	
KP	TE_KP_UPD_Set Block Sampling Flag due to no State licence No		TRUE	

Info area	Trigger Name	NEW	UPDATE	DELETE
U007	TE_KP_UPD_Set Opinion Leader Flag	TRUE	TRUE	
KP	TE_KP_UPD_Set Pool Clearing state ForValida-tion	TRUE	TRUE	
KP	TE_KP_UPD_Street	TRUE	TRUE	
MB	TE_KP_UPD_Sum Call Expenses per current Year		TRUE	TRUE
KP	TE_KP_UPD_Up-date Contact Status	TRUE	TRUE	
KP	TE_KP_UPD_Up-date Contact Type	TRUE	TRUE	
KP	TE_SB_UPD_Con-tact Actual Vis-its/Year/Busi-ness Area		TRUE	
KP	TE_U007_UPD_Con-tact Actual Vis-its/Year		TRUE	
KP	TE_U007_UPD_Con-tact Actual Vis-its/Year/Busi-ness Area		TRUE	

C# files (all files include info area KP)

File Name	File Path	KP include ?	Comment
ContactTimes.cs	te\update.Template.Lsi	yes	> wird nicht mehr verwendet!
Arrival.cs	te\update.Template.Lsi\CallPlanning	no	
CalculationInfo.cs	te\update.Template.Lsi\CallPlanning	no	
CallPlanningBaseCT.cs	te\update.Template.Lsi\CallPlanning	no	
CallPlanningNoCoordCT.cs	te\update.Template.Lsi\CallPlanning	no	
CallPlanningTools.cs	te\update.Template.Lsi\CallPlanning	no	
CallPlanningWithCoordCT.cs	te\update.Template.Lsi\CallPlanning	no	
CandidateCT.cs	te\update.Template.Lsi\CallPlanning	no	
CandidateType.cs	te\update.Template.Lsi\CallPlanning	no	
CpErrorUids.cs	te\update.Template.Lsi\CallPlanning	no	
CpQueryInfo.cs	te\update.Template.Lsi\CallPlanning	no	
GeoDB.cs	te\update.Template.Lsi\CallPlanning	no	

File Name	File Path	KP include ?	Comment
Holiday.cs	te\update.Template.Lsi\CallPlanning	no	
Settings.cs	te\update.Template.Lsi\CallPlanning	no	
Utils.cs	te\update.Template.Lsi\CallPlanning	no	
VisitTimes.cs	te\update.Template.Lsi\CallPlanning	no	
Waypoint.cs	te\update.Template.Lsi\CallPlanning	yes	Line 42 > File not used anymore!
CallPlanningChannel.cs	te\update.Template.Lsi\Channels	no	
CharacteristicsManagementChannel.cs	te\update.Template.Lsi\Channels	no	
KeyAccountManagementChannel.cs	te\update.Template.Lsi\Channels	no	
KeyAccountManagementChannel.DataContracts.cs	te\update.Template.Lsi\Channels	no	
BuildCharacteristicsTree.cs	te\update.Template.Lsi\CharacteristicsManagement	no	Alreadyreconstructed to indoarea PE!
GroupItemNode.cs	te\update.Template.Lsi\CharacteristicsManagement	no	Alreadyreconstructed to infoarea PE!
GroupNode.cs	te\update.Template.Lsi\CharacteristicsManagement	no	Alreadyreconstructed to infoarea PE!

File Name	File Path	KP include ?	Comment
Settings.cs	te\update.Template.Lsi\CharacteristicsManagement	no	Alreadyreconstructed to infoarea PE!
BulkListingCommand.cs	te\update.Template.Lsi\Services	no	
IMatchupService.cs	te\update.Template.Lsi\Services	no	
JobCardsCommand.cs	te\update.Template.Lsi\Services	no	
KeyAccountManagementCommandBase.cs	te\update.Template.Lsi\Services	no	
MatchupService.cs	te\update.Template.Lsi\Services	no	

Modifications

Here you can view the list of trigger formats and designer elements modifications.

Trigger Formats

List of trigger formats.

The following list shows all triggers, which were changed:

TE_PE_UPD_Street

Trigger old

TE_KP_UPD_Street

Trigger new

TE_PE_UPD_Street

Right Old

TE_KP_UPD_Street bei NEW, UPDATE, UPDATE FIELDS (Starße privat) entfernt

Right New

TE_PE_UPD_Street bei NEW , UPDATE, UPDATE FIELDS (Starße privat) hinzugefügt!

Fields old

KP.-x-Straße privat short(17), KP.Straße privat (5002)

Fields new

PE.-x-Straße privat short(9), PE.Straße privat (5006)

TE_PE_UPD_Gender

Trigger old

TE_KP_UPD_Gender

Trigger new

TE_PE_UPD_Gender

Right Old

TE_KP_UPD_Gender bei NEW, UPDATE, UPDATE FIELDS (Anrede) entfernt

Right New

TE_PE_UPD_Gender bei NEW , UPDATE, UPDATE FIELDS (Anrede) hinzugefügt!

TE_CP_DV_Role, TE_PE_DV_Person

Trigger old

TE_KP_DV_Contact

Trigger new

TE_CP_DV_Role, TE_PE_DV_Person

Right Old

TE_KP_DV_Contact bei NEW entfernt

Right New

TE_CP_DV_Role, TE_PE_DV_Person jeweils im richtigen Infobereich bei NEW hinzugefügt!

Fields old

KP.Personenstatus (69) , KP.Land privat (13), KP.Srache(39) , KP.ABC(56)

Fields new

CP.Person status (TE) (5029), PE.Personenstatus (TE) (5009), PE.Land privat (6), PE.Sprache (17), PE.Klassifizierung (5034)

TE_PE_UPD_Fill ABC from Classification

Trigger old

TE_KP_UPD_Fill ABC from Classification

Trigger new

TE_PE_UPD_Fill ABC from Classification

Right Old

TE_KP_UPD_Fill ABC from Classification bei NEW, UPDATE, UPDATE FIELDS (Klassifizierung) entfernt

Right New

TE_PE_UPD_Fill ABC from Classification bei NEW, UPDATE, UPDATE FIELDS (Klassifizierung) hinzugefüg

Fields old

KP.Klassifizierung (X/5037), KP.ABC (C/56)

Fields new

PE.Klassifizierung, PE.ABC

TE_CP_UPD_Fill potential/intimacy/classification from KPI

Trigger old

TE_KP_UPD_Fill potential/intimacy/classification from KPI

Trigger new

TE_CP_UPD_Fill potential/intimacy/classification from KPI

Right Old

TE_KP_UPD_Fill potential/intimacy/classification from KPI bei NEW, UPDATE, UPDATE FIELDS (Geschäftsbereich, Marke, Klassifizierung, Marktanteil, Potential) enftternt! Bedingt (PE-StaNo und PE-SerNo <> '')

Right New

TE_CP_UPD_Fill potential/intimacy/classification from KPI bei NEW, UPDATE, UPDATE FIELDS (Geschäftsbereich, Marke, Klassifizierung, Marktanteil, Potential) hinzugefügt! Bedingt (PE-StaNo und PE-SerNo <> '')

Fields old

KP.Target (5044), KP.Potential (5043), KP.Marktanteil (5042), KP.Klassifizierun (5037)

Fields new

CP.Target (5014), CP.Potential (5013), CP.Marktanteil (5012), CP.Klassifizierung (5010)

TE_CP_UPD_Last Call/Visit

Trigger old

TE_KP_UPD_Last Call/Visit

Trigger new

TE_CP_UPD_Last Call/Visit

Right Old

TE_KP_UPD_Last Call/Visit bei NEW, UPDATE, DELETE, UPDATE FIELDS (Geschäftsbereich, Start am, Typ, Status) enftternt!

Right New

TE_CP_UPD_Last Call/Visit bei NEW, UPDATE, DELETE, UPDATE FIELDS (Geschäftsbereich, Start am, Typ, Status) hinzugefügt!

Fields old

KP.Letzter Besuch (79), KP.Letzter Kontakt (78), KP.IST-Besuche/Periode (75), KP.Nächster Besuch (80)

Fields new

CP.Letzter Besuch (73), CP.Letzter Kontakt (72), CP.Ist-Besuche/Periode(69), CP.Nächster Besuch (74)

TE_CP_UPD_Set Opinion Leader Flag

Trigger old

TE_KP_UPD_Set Opinion Leader Flag

Trigger new

TE_CP_UPD_Set Opinion Leader Flag

Right Old

TE_KP_UPD_Set Opinion Leader Flag from KPI bei NEW, UPDATE, UPDATE FIELDS (-x-Rolle, -x-Ebene, -x-Loyalität) enfternt! Bedingt (-x-Rolle <> '' AND -x-Ebene <> '' AND -x-Loyalität <> '' und Kontaktperson <> '#0')

Right New

TE_CP_UPD_Set Opinion Leader Flag from KPI bei NEW, UPDATE, UPDATE FIELDS (-x-Rolle, -x-Ebene, -x-Loyalität) hinzugefügt! Bedingt (-x-Rolle <> '' AND -x-Ebene <> '' AND -x-Loyalität <> '' und Kontaktperson <> '#0')

Fields old

KP.Meinungsbildner (81)

Fields new

CP.Meinungsbildner (78)

TE_CP_DEL_Delete potential/intimacy/classification from KPI

Trigger old

TE_KP_DEL_Delete potential/intimacy/classification from KPI

Trigger new

TE_CP_DEL_Delete potential/intimacy/classification from KPI

Right Old

TE_KP_DEL_Delete potential/intimacy/classification from KPI from KPI bei DELETE enfternt! Bedingt (PE_StaNo <> "" und PE_SerNo <> "")

Right New

TE_CP_DEL_Delete potential/intimacy/classification from KPI from KPI bei DELETE hinzugefügt! Bedingt (PE_StaNo <> "" und PE_SerNo <> "")

Fields old

KP.Potential (5043), KP.Marktanteil (5042), KP.Klassifizierun (5037)

Fields new

CP.Potential (5013), CP.Marktanteil (5012), CP.Klassifizierun (5010)

TE_CP_UPD_CallWFCalculateIntimacy/Potential

Trigger old

TE_KP_UPD_CallWFCalculateIntimacy/Potential

Trigger new

TE_CP_UPD_CallWFCalculateIntimacy/Potential

Right Old

TE_KP_UPD_CallWFCalculateIntimacy/Potential from IT bei NEW, UPDATE, DELETE enfternt! Bedingt (PE_StaNo <> "")

Right New

TE_CP_UPD_CallWFCalculateIntimacy/Potential from IT bei NEW, UPDATE, DELETE hinzugefügt! Bedingt (PE_StaNo <> "")

Fields old

KP.TE:Triggerfield boolean (5065)

Fields new

CP.TE:Triggerfield boolean (5028)

TE_CP_UPD_Create Contact Key

Trigger old

TE_KP_UPD_Create Contact Key

Trigger new

TE_CP_UPD_Create Contact Key

Right Old

TE_KP_UPD_Create Contact Key from KP bei NEW enfternt!

Right New

TE_CP_UPD_Create Contact Key from CP bei NEW hinzugefügt! Bedingt

Fields old

KP.Personen-Nr. (73)

Fields new

CP.Personen-Nr.(67)

TE_CP_UPD_Dummy update for checking block sampling flag

Trigger old

TE_KP_UPD_Dummy update for checking block sampling flag

Trigger new

TE_CP_UPD_Dummy update for checking block sampling flag

Right Old

TE_KP_UPD_Dummy update for checking block sampling flag from MA bei UPDATE, UPDATE FIELDS (Dokument-Muster) enfternt!

Right New

TE_CP_UPD_Dummy update for checking block sampling flag from MA bei UPDATE, UPDATE FIELDS (Dokument-Muster) hinzugefügt!

Fields old

KP.TE:Triggerfield text (74)

Fields new

CP.TE:Triggerfield text (68)

TE_PE_UPD_Set Block flags

Trigger old

TE_KP_UPD_Set Block flags

Trigger new

TE_PE_UPD_Set Block flags

Right Old

TE_PE_UPD_Set Block flags bei NEW, UPDATE, UPDATE FIELDS (Personen status (TE) (158), Personentyp (TE) (157), Staatl. Lizent-Nr.(160)) entfernt!

Right New

TE_PE_UPD_Set Block flags bei NEW, UPDATE, UPDATE FIELDS (Personen status (TE) (97), Personentyp (TE) (140)) hinzugefügt!

Fields old

KP.Sperre Muster (5028), KP.Personentyp (TE)(5005)

Fields new

PE.Sperre Muster, PE.Personentyp (TE)

TE_CP_UPD_Set Block MedRequest flag based on Account setting

Trigger old

TE_KP_UPD_Set Block MedRequest flag based on Account setting

Trigger new

TE_CP_UPD_Set Block MedRequest flag based on Account setting

Right Old

TE_KP_UPD_Set Block MedRequest flag based on Account setting bei UPDATE, UPDATE FIELDS (FI.Sperre MedWiss-Anfrage) entfernt!

Right New

TE_CP_UPD_Set Block MedRequest flag based on Account setting bei UPDATE, UPDATE FIELDS (FI.Sperre MedWiss-Anfrage) entfernt!

Fields old

KP.Sperre MedWiss-Anfrage (5030)

Fields new

CP.Sperre MedWiss-Anfrage (5006)

TE_PE_UPD_Set Block Sampling flag based on Account setting

Trigger old

TE_KP_UPD_Set Block Sampling flag based on Account setting

Trigger new

TE_PE_UPD_Set Block Sampling flag based on Account setting

Right Old

TE_KP_UPD_Set Block Sampling flag based on Account setting bei UPDATE, UPDATE FIELDS (FI.Sperre Muster) entfernt!

Right New

TE_PE_UPD_Set Block Sampling flag based on Account setting bei UPDATE, UPDATE FIELDS (FI.Sperre Muster) entfernt!

Fields old

KP.Sperre Muster (5028)

Fields new

PE.Sperre Muster (5050)

TE_KP_UPD_Set Block Sampling Flag due to no State licence No

Trigger old

TE_KP_UPD_Set Block Sampling Flag due to no State licence No

Trigger new

Right Old

TE_KP_UPD_Set Block Sampling Flag due to no State licence No bei UPDATE, UPDATE FIELDS (TE:Triggerfield text) entfernt! Bedingt (KP.TE:Triggerfield text = "Var.CHECK_BLOCKSAMPLING" AND KP.Staatl. Lizenz-Nr. = '')

Right New

Fields old

KP.Sperre Muster (5028), KP.TE:Triggerfield text

Fields new

TE_OneKey_CP_UPD_SetPoolClearingStateForValidation

Trigger old

TE_KP_UPD_Set Pool Clearing state ForValidation

Trigger new

TE_OneKey_CP_UPD_SetPoolClearingStateForValidation

Right Old

TE_KP_UPD_Set Pool Clearing state ForValidation bei NEW, UPDATE, UPDATE FIELDS (see Sheet Mapping) entfernt! Bedingt (KP.Position = VAR.TE_Clearing.PersonIncludeTypes)

Right New

TE_OneKey_CP_UPD_SetPoolClearingStateForValidation bei PE und CP bei NEW, UPDATE, UPDATE FIELDS (see Mapping tab) hinzugefügt!

Fields old

KP.Pool Clearing status (5060)

Fields new

CP.Pool clearing status (5023)

TE_CP_UPD_Sum Call Expenses per current Year

Trigger old

TE_KP_UPD_Sum Call Expenses per current Year

Trigger new

TE_CP_UPD_Sum Call Expenses per current Year

Right Old

TE_KP_UPD_Sum Call Expenses per current Year bei UPDATE, DELETE, UPDATE FIELDS (Besuchsausgaben/Teilnehmer) entfernt! Bedingt (MB.PE_SerNo <> "")

Right New

TE_CP_UPD_Sum Call Expenses per current Year bei UPDATE, DELETE, UPDATE FIELDS (Besuchsausgaben/Teilnehmer) hinzugefügt! Bedingt (MB.PE_SerNo <> "")

Fields old

KP.Kontaktausgaben/Jahr

Fields new

CP.Kontaktausgaben/Jahr

TE_CP_UPD_Update Contact Status

Trigger old

TE_KP_UPD_Update Contact Status

Trigger new

TE_CP_UPD_Update Contact Status

Right Old

TE_KP_UPD_Update Contact Status bei NEW, UPDATE, UPDATE FIELDS (Personenstatus) entfernt!

Right New

TE_CP_UPD_Update Contact Status bei NEW, UPDATE, UPDATE FIELDS (Personenstatus) hinzugefügt!

Fields old

KP.Personen status (TE)

Fields new

CP.Personen status (TE)

TE_U007_UPD_Contact Actual Visits/Year

Trigger old

TE_U007_UPD_Contact Actual Visits/Year

Trigger new

TE_U007_UPD_Contact Actual Visits/Year

Right Old

TE_U007_UPD_Contact Actual Visits/Year bei UPDATE, UPDATE FIELDS (Ist-Besuche/Periode) entfernt!

Right New

TE_U007_UPD_Contact Actual Visits/Year bei UPDATE, UPDATE FIELDS (Ist-Besuche/Periode) hinzugefügt!

TE_U007_UPD_Contact Actual Visits/Year/Business Area

Trigger old

TE_U007_UPD_Contact Actual Visits/Year/Business Area

Trigger new

TE_U007_UPD_Contact Actual Visits/Year/Business Area

Right Old

TE_U007_UPD_Contact Actual Visits/Year/Business Area bei UPDATE, UPDATE FIELDS (Ist-Besuche/Periode) entfernt!

Right New

TE_U007_UPD_Contact Actual Visits/Year/Business Area bei UPDATE, UPDATE FIELDS (Ist-Besuche/Periode) hinzugefügt!

Fields old

Fields new

TE_KP_UPD_CalculateCurrentYear

Trigger old

TE_KP_UPD_CalculateCurrentYear

Trigger new

TE_KP_UPD_CalculateCurrentYear

Fields old

KP.FreeC1

TE_PE_UPD_Map Person Type

Trigger old

TE_KP_UPD_Update Contact Type

Trigger new

TE_PE_UPD_Map Person Type

Right Old

TE_KP_UPD_Update Contact Type bei NEW,UPDATE, UPDATE FIELDS (Personentyp) entfernt!

Right New

TE_PE_UPD_Map Person Type bei NEW,UPDATE, UPDATE FIELDS (Personentyp) hinzugefügt!

Fields old

KP.Persontyp

Fields new

PE.Persontyp

TE_KP_Calculate_Intimacy/Potential_For_KPI

Trigger old

TE_KP_Calculate_Intimacy/Potential_For_KPI

Trigger new

Right Old

TE_KP_Calculate_Intimacy/Potential_For_KPI bei UPDATE, UPDATE FIELDS (Ist-Besuche/Periode) entfernt!

TE_KP_UPD_Link to Main - Delete

Trigger old

TE_KP_UPD_Link to Main - Delete

Trigger new

TE_KP_UPD_Link to Main - Delete

Right Old

Right New

Fields old

Fields new

Designer Elements

List of designer elements.

Designer Element type	Name	Status	Comment
Query	TE_Report_HospitalOrganigram	Open	Open
Query	TE_CallPreparation_KP	Open	Open
Query	TE_FI_Info	Open	Open
Query	TE_KP_Info	DELETED	BackUp in Package 2013_11_12_KP_BackUp
Button	TE_KP_Factsheet	DELETED	BackUp in Package 2013_11_12_KP_BackUp
Header	KP.New	DELETED	BackUp in Package 2013_11_12_KP_BackUp
Header	KP.Expand	DELETED	BackUp in Package 2013_11_12_KP_BackUp
Header	KPTree.SearchResults	DELETED	BackUp in Package 2013_11_12_KP_BackUp
Header	KPTree.Expand	DELETED	BackUp in Package 2013_11_12_KP_BackUp
Header	KPTree.ExpandChildren	DELETED	BackUp in Package 2013_11_12_KP_BackUp

Designer Element type	Name	Status	Comment
Header	KPTree.ExpandOp-tions	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
Table Caption	KP	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
Table Caption	KPEmailWarning	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
Table Caption	KPKMParentLink1	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
Table Caption	KPKMParentLink2	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
Expand	KP	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
Expand	KPTreeSub	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
Search	KP.Tree	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
FieldControl.Details	FieldGroup.Fa-vorites	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
FieldControl.Details	FieldGroup.KP	DELETED	BackUp in Package 2013_11_12_ KP_BackUp

Designer Element type	Name	Status	Comment
FieldControl.List	FieldGroup.KP	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
FieldControl.MiniDetails	FieldGroup.KP	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
FieldControl.Search	FieldGroup.KP	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
HeaderGroup	TE_MA_KPRecord	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
Search	TE_MA_KP	DELETED	BackUp in Package 2013_11_12_ KP_BackUp
FieldGroup	TE_MA_KP	DELETED	BackUp in Package 2013_11_12_ KP_BackUp

Filter trees

There is one main FI tree view and one main PE tree view. To distinguish between opening records in the right tree view, you have to choose in which tree view the record should be opened.

For example if you want to open MA records in the FI tree view, you have to use the dafault action “TE_FI_JS_OpenRecordInFilterTreeView”. If you want to open a record in a tree view but there is no link from the info area to the tree view info area, the function tries to load the other tree view. You have to distinguish between open FI / PE records or related records in tree view.

This flowchart shows how to use this default actions and what happens in the background when opening a record in tree view.

Action template “TE_OpenRecordInTreeView”

The following picture shows how to use the action template behind a menu action. With parameter “rootInfo area” you can choose in which treeview the record is opened.

JavaScript function “SetTreeView”

Following flowchart shows how the javascript functions works. Basically there are 4 steps within the function. First, the “Link” strings for following CRUD read actions, is created. There are two different link strings at one time. One linkstring is “$Link[“FI”]”, the opposite link string is “$Link[“PE”]”. Then the CRUD events is fired. Depending on the result of the CRUD read events different tree view is executed.

Designer Filter Tree Views

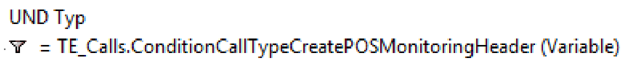
Within a tree view configuration you have the possibility to add filters to the tree nodes. The filters can be defined in designer and selected in the dropdown menu in field “Info Area Filter”. If the filter returns true, the node is displayed, if the result is false, the node is not displayed.

Note: Only filtes from the Info area of which the treeview is about, can be used in filter drop down menu. E.g.: If you are in the FI tree view, in each node only FI filters can be used.

Win variables in conditions

Learn about the win variable conditions.

In the rights it is often necessary to define conditions for example for calling triggers or workflows.



Light User

Learn about the light user for the ISI Business solution template.

The Template comes with a light user role "TE_Light_User"

And the fitting role-right: "TE_RR LightUser".

The light user can read everything, but his write rights are restricted to companies, persons and appointments.

Note: If the CRM process configuration is edited you need to update the process configuration with the bulkloader.

Phone

Learn about the Phone feature for LSI business solution template.

By default the selected profile is "TE_Phone_Profile_Demo" which uses uppDemo.dll. Select "TE_Phone_Profile_Standard" to use the uppTapiExt.dll.

Software that must be installed on every client:

- Tapi phone client of your telephone system
- CRM.phone

Exchange Connector

Learn about the general and technical aspects of configuring exchange connector on CG/LSI template.

The standard product Aurea CRM exchange connector has been adapted to allow the following functionality in the LSI Template:

#	Action	Outlook	CRM	Direction	Result
1	New	Appointment	Activity (Visit)	Outlook to CRM	- After synchronization link to CRM item appears in text - Location is transferred from Outlook to CRM - Reminder duration is transferred from Outlook to CRM
2	New	Appointment	Activity (Visit)	CRM to Outlook	Appointment is created in both systems
3	Update	Appointment	Activity (Visit)	Outlook to CRM	Appointment updated, e.g. new time in both systems
4	Update	Appointment	Activity (Visit)	CRM to Outlook	Appointment updated, e.g. new participant in both systems

#	Action	Outlook	CRM	Direction	Result
5	Delete	Appointment	Activity (Visit)	Outlook to CRM	Appointment is flagged "Connector deleted" in CRM
6	Delete	Appointment	Activity (Visit)	CRM to Outlook	Appointment is deleted in both systems.
7	New	Email	Activity (Email)	Outlook to CRM	Appointment/Email in both systems
8	New	Email	Activity (Email)	Outlook to CRM	Complete mail is stored as ".msg" file as linked document (D1)
9	New	Email	Activity (Email)	Outlook to CRM	With email address not existent in CRM as FROM --> Email is flagged "Connector Missing participants" and in "Missing Participants" email address is listed. Email is linked to "TO" - the Rep.

#	Action	Outlook	CRM	Direction	Result
10	New	Email	Activity (Email)	Outlook to CRM	With email address not existent in CRM as CC --> Email is flagged "Connector Missing participants" and in "Missing Participants" email address is listed. Email is linked to "FROM" person.
11	New	Task	Task	CRM to Outlook	Task is present in both systems. With updateCRM there are 2 new catalogue fields "InProgress" and "Approved".
12	Update	Task	Task	CRM to Outlook	Task updated in both systems
13	Update (status)	Task	Task	Outlook to CRM	Change status in CRM
14	Delete	Task	Task	CRM to Outlook	Task deleted in both systems

#	Action	Outlook	CRM	Direction	Result
15	New	Absence	Activity	CRM to Outlook	Other Appointments with type "Holiday" are created as Appointment "Tentative" in Outlook, all others with "Out of Office".
16	Update	Absence	Activity	CRM to Outlook	Absence is updated.

Technical

The following files have been adapted to implement the functions in the LSI Template. These files contain no customer specific configuration as e.g. user, exchange server name.

All customizations are prefixed with “Customised”.

All activations, i.e. standard functionality, which are not active by default, are prefixed “Activated”.

Connector Files:

\<Connector Installation directory>\FieldMapping.xml

\<Connector Installation directory>\SynchroConnectorConfig.xml

Interface Files:

\<Interface Installation directory>\xml\Forms.xml

\<Interface Installation directory>\xml\SyncML_gw2mm.xslt

\<Interface Installation directory>\xml\SyncML_mm2gw.xslt

While setting up the Exchange Connector please also refer to the Technical Guides of Connector and Interface on our support.aurea.com website.

ConnectLive

Learn about the fields for record detail view.

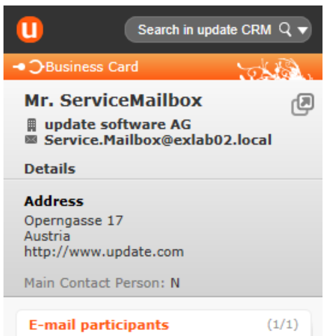
General

The following Fields are used the Record Details View:

FI: Account Name (2), Street (5010), ZIP (6), City (8), Country (5), Website (21)

KP: Salutation (8), Title (7), First Name (10), Last Name (9), Person Type (128), Business E-Mail (27), Business Telephone (21), Business Mobile (24), Function (36), Date of Birth (40), Main Contact Person (5038) MA: Subject (90), Activity Type (2), Activity Status (3), Rep (93), Starts on (0), Starts at (1), Text (36)

Additionally the following Info areas are searchable through the the Search in the top-right corner of the Add-In: FI, KP, MA.



Known Issues

It is currently not possible to synchronize contacts with the Exchange server (PVCS #79581)

For the info area A3 it is required to input an Other Appointment type into the field ID 4 which is not used in the CRM, thus we sync the values with the field ID 5000.

The mapping between the catalogs is done by the trigger “TE_A3_UPD_Occupation4Connector” in the right “TE_SR Template Main - LSI”.

Mapping

ID:5000 Variable Catalog Name: (202) Occupation	<>	ID:4 Fixed Catalog Name: -x- (Other Appointment (A3))
Administration	<>	Other Reasons
Conference	<>	Other Reasons
Holiday	<>	Holiday
Meeting/Education	<>	Other Reasons
Others	<>	Other Reasons
Sick leave	<>	Sickness
Visit	<>	Other Reasons

Configuration (MC)

The configuration records are delivered for template stations as well as without a station number (for some MC records it is not possible to define a station number).

LSI&CG

The following records are delivered for station number 10002 and can be considered as example configurations. They have no effect on your customer’s station!

Our recommendation is to copy those records for your customer’s station number and configure the values.

Category bv	Option	ID
Data Model	Reference Text	(MC-10002-10)
General Settings	Connection Settings for SMTP	(MC-10002-25)
General Settings	E-mail Client	(MC-10002-8)
General Settings	Title bar	(MC-10002-18)
Geo-coordinates	Active in the following modules	(MC-10002-56)

Category bv	Option	ID
Geo-coordinates	Geolocation handler	(MC-10002-34)
Geo-coordinates	Geolocation handler	(MC-10002-35)
Geo-coordinates	Geolocation handler	(MC-10002-37)
Geo-coordinates	Geolocation handler	(MC-10002-38)
Geo-coordinates	Geolocation handler	(MC-10002-40)
Geo-coordinates	Geolocation handler	(MC-10002-41)
Geo-coordinates	Geolocation handler	(MC-10002-46)
Geo-coordinates	Geolocation handler	(MC-10002-47)
Listing	Inheritance - Serial Input	(MC-10002-23)
Listing	Inheritance	(MC-10002-22)
Triggers	Log triggers	(MC-10002-3)
Word processor	Document Types	(MC-10002-16)
Workflow	Log workflows	(MC-10002-9)

Geo-coordinates

The template includes configuration (MC) records for geo-coordinates. The license key is not included and the parameter “Use Geo-coordinates” must be entered manually.

The Geolocation handler is defined for FI, PE, ID and ZA for station 10002. Please copy those records and change the station number.

The Query format is defined for FI, PE, ID and ZA and looks like this:

adminDistrict={F5000}&locality={City}&postalCode={ZipCode}&ad-dressLine={F5010}&countryRegion={Country}

Hook functions

The javascript file lsiutils.js contains helper functions, which might be useful.

_hookSingleSelect

A generic hook function for singleSelect for an array of field IDs. Same behaviour like a radio button. Used in PL (Country OR Pricelist OR Customer Group) and in ZU (MicroBrick or PostCode. The fieldUids is cleared on leaving the hook-field. You can also provide a msgtxtGrp and msgtxtId which is displayed as a notification.

Function definition

```
_hookSingleSelect: function ($, fieldUids, msgtxtGrp, msgtxtId)
```

Call the function like this:

```
u8.TeLSI.Utils._hookSingleSelect($, [ 2,3 ], "TE_MESSAGEBOX", 50
```

Quick Add / Serial Entry configuration

Learn to manage filter buttons in the web config parameter.

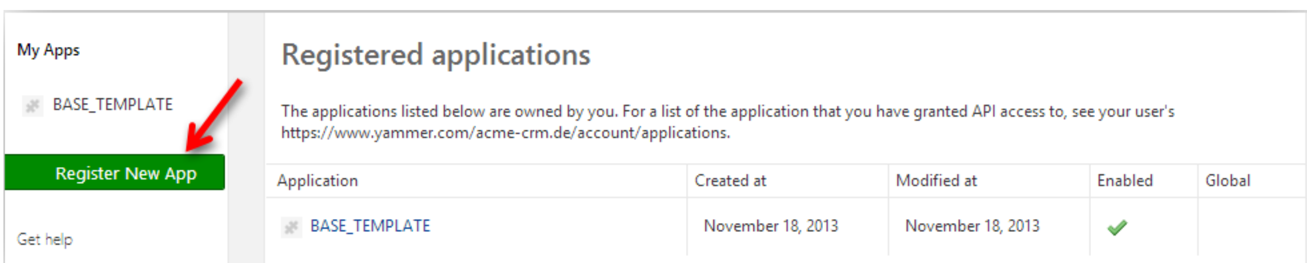
You can edit the order, name and visibility of filter buttons for the “quick add” in the webconfig parameter “SerialEntry.OrderFilter“.

Yammer

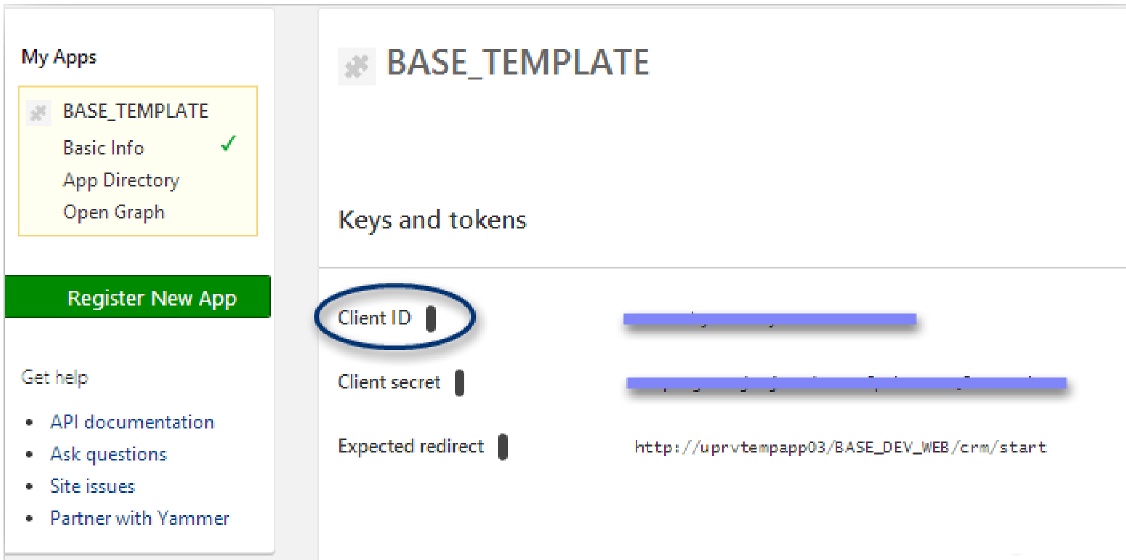
Learn about using yammer in business solution template.

To get your own yammer id, you have to register your application in yammer.

1. Login in yammer with your (admin) user
2. Use this link: https://www.yammer.com/client_applications.
3. Click “Register New App”



4. After registering your application you can see your “Client ID” which you have to enter in the html file

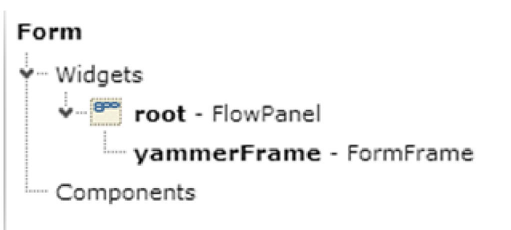


Aurea CRM designer

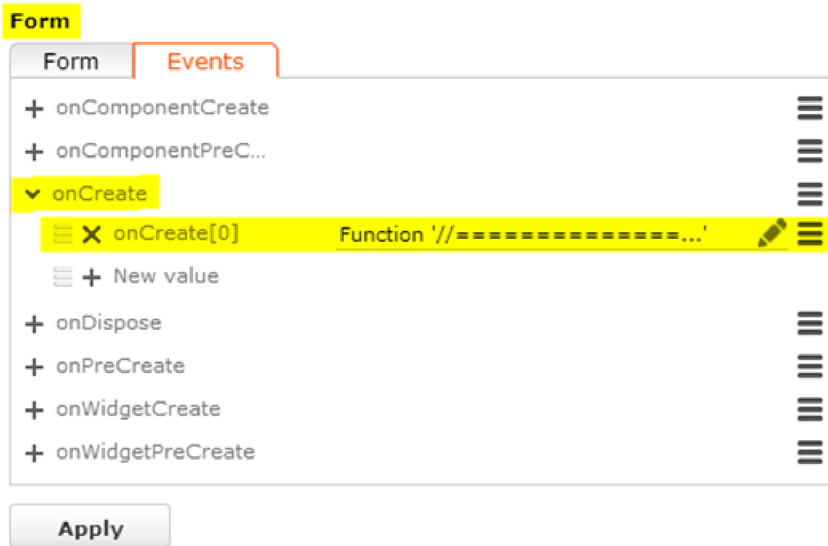
As part of the LSI Template we deliver an example-form in the TE_CORE Configuration.

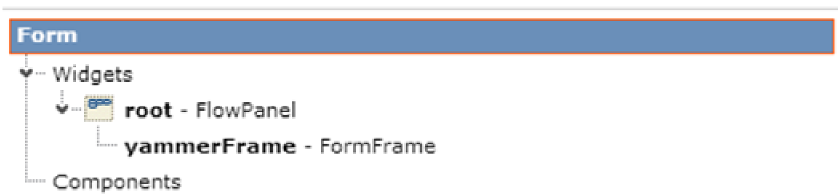
Formname: “CORE_Yammer_Expample_FI”

This form contains a FormFrame, which allows to display the Yammer content.



We added an OnCreate javascript function for the form:





You have to modify the function, to use your project specific data:

Fill all parameters on the top of the script

Parameter Name	Description	Example
baseUrl	URL of your web installation	http://uprvtem-papp03/BASE_DEV_WEB/te.base/Yammer.html?
htmlUrl	URL of the yammer html file	http://uprvtem-papp03/BASE_DEV_WEB
imageUrl	URL of an image (eg. Company Icon for info area FI)	http://www.update.com/var/em_plain_site/storage/images/media/images/logos/update/isi_icon_button/120519-1-eng-US/ISI_icon_button_65px.png
network	Yammer network name	-
objectType	type of yammer feed	company
backlink	link of the record in your crm to navigate from yammer back to your crm system	http://uprvtem-papp03/BASE_DEV_WEB/crm/view?uid=
postTextTextgroup	Name of the textgroup in your designer config, where the string you want to display is located	TE_CORE
postTextNr	Number of the text in the textgroup	54

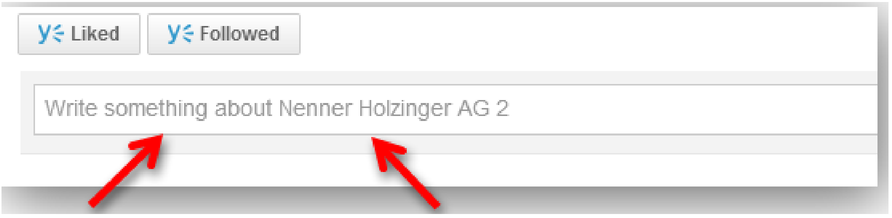
Enter all fields of the info area, which you want to pass to yammer as title or description

```
// get company fields
u8.services.crud.read({ uid: uid, fields: ["Company", "Synonym"] }, function

```

Modify the strings “title” and “description” so that they fit to your customer needs:

```
        // get the yammer title from the business object
        var title = crudArgs.businessObject.get("Company");
        var description = crudArgs.businessObject.get("Synonym");

```

UI Text:



We are using two strings to display this text:

“Write something about” = postText (in our case TextNr. 54 in textgroup TE_CORE)

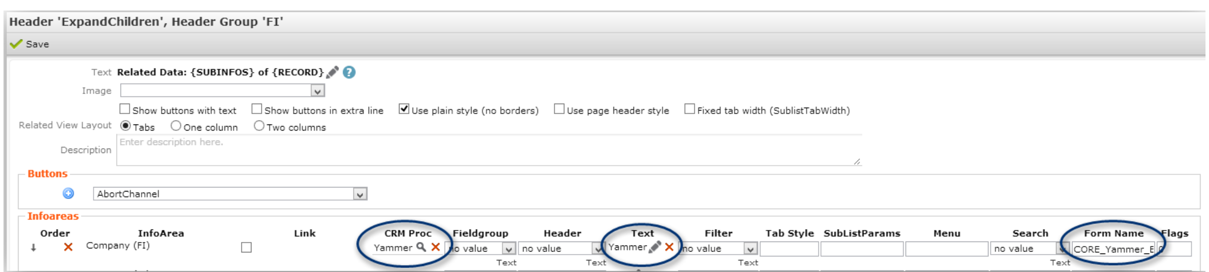
“Nenner Holzinger AG 2” = title

We are also delivering an example html file, which you can use as a template, so please copy the “Yammer_Expample.html” file which is located in the folder “\web\te.base” and rename the copy to “Yammer.html”

You have to enter your project specific yammer id in this file:

```
<html>
<head>
    <title>Yammer</title>

    <!-- Enter your project specific yammer ID here -->
    <script data-app-id="[redacted]" src="https://assets.yammer.com/platform/yam.js"></script>

    <script src="http://code.jquery.com/jquery-1.10.1.min.js"></script>
    <style type="text/css">
        .feed { width:95%; height:95%; margin:5px; margin-top: 7px; float:left;}
```

To display the form in your web application just add the form as a related data tab:



Parameters:

CRM Process: “Yammer”

Text: “Yammer” (Textgroup: TE_CORE)

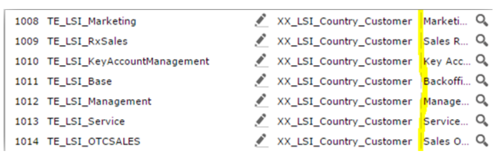
Form Name: Your form name

The CRM process “Yammer” (1.400.3) is a node beneath the “Template AddOn” node in the process config tree:

This process is deactivated by default, so you have to activate it in your process configs, if you want to use it.

Startpages

All defined startpages are user /role dependent. For each role, there is a designer configuration with at least one adaption, the web configuration entry “StartPage”. In this web configuration entry you can define which startpage should be visible after the login in AureaCRM. To achieve that a user with a certain role get the right startpage, some definition in the user configuration in the designer are necessary.



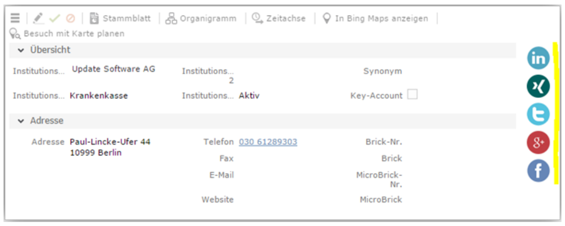
This means, that each user with the role “Marketing” gets the “TE_LSI_Marketing” configuration and therefore the Marketing-Startpage.

Social fields in master data

In PE and FI expand mask, there are new social fields and connected social images defined. The mask fields are invisible if you are in view mode and is displayed if you are in edit view. If one of the fields is filled with data, the connected image at the right side of the mask is displayed. (same in the FI and PE mask)

Field	Large Image Template
FI.LinkedIn (198)	SocialNetwork_LinkedIn{javascript:$['VAL-UE']?"":"_doNothing";}
FI.Xing (199)	SocialNetwork_Xing{javascript:$['VAL-UE']?"":"_doNothing";}
FI.Twitter (200)	SocialNetwork_Twitter{javascript:$['VAL-UE']?"":"_doNothing";}

Field	Large Image Template
FI.Coogle+ (201)	SocialNetwork_GooglePlus{javascript:$['VALUE']?"":"_doNothing";}
FI.Facebook (202)	SocialNetwork_Facebook{javascript:$['VALUE']?"":"_doNothing";}



CRM.pad

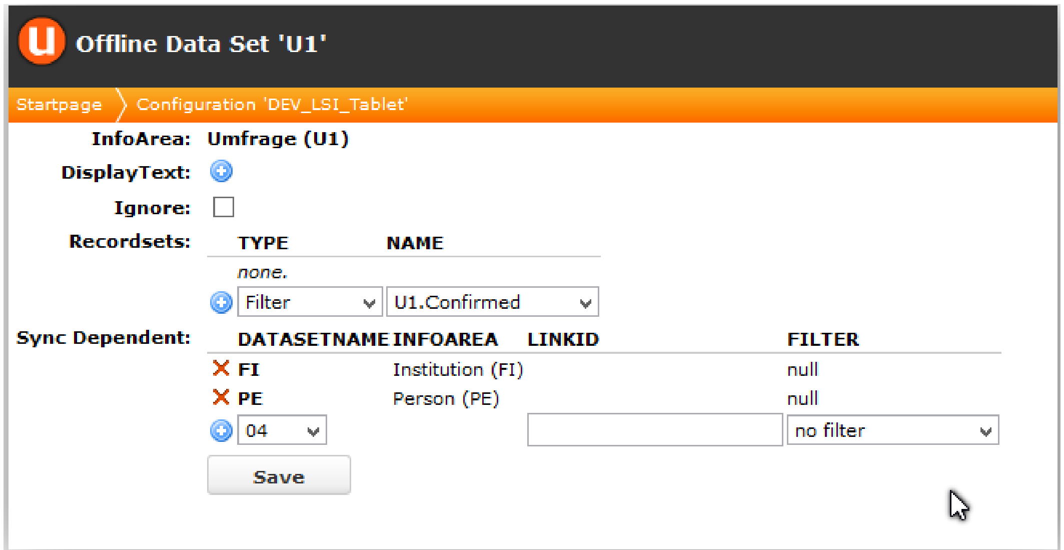
Learn about the business solution template configurations for CRM.pad.

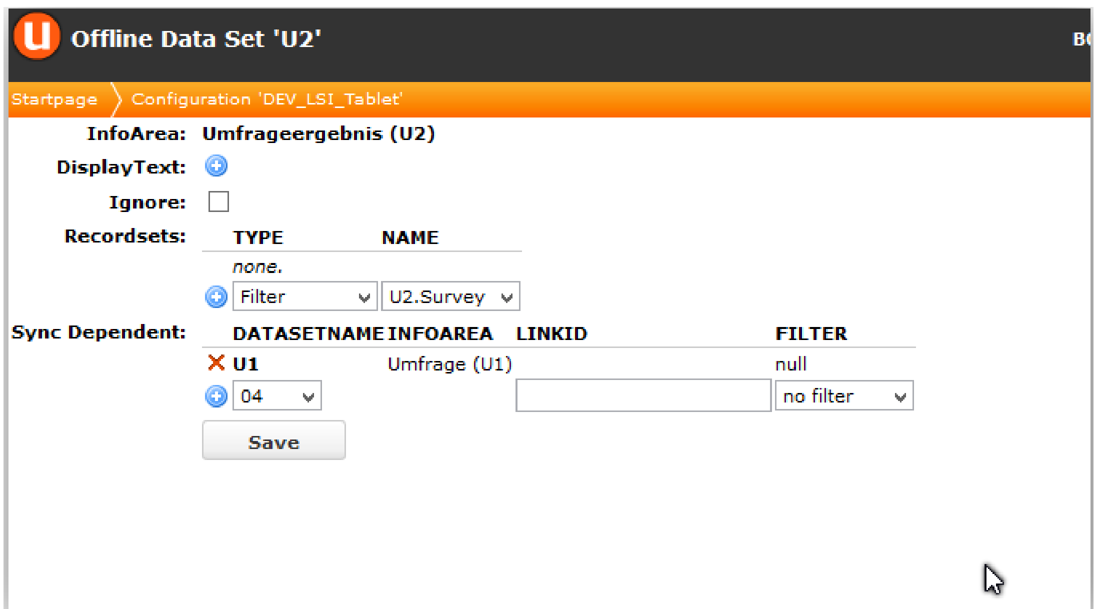
Questionnaire

Learn how to prepare questionnaire and conducting surveys.

Offline Record Sets

As in the standard version, F1, F2 and F3 need to be synchronized so as to be available offline. U1 and U2 also need to be synchronized in order to display the answers that have already been given.


Offline Data Set 'U1'
Startpage
Configuration 'DEV_LSI_Tablet'
InfoArea: Umfrage (U1)
DisplayText:
Ignore:
Recordsets: TYPE NAME
none.
Filter
U1.Confirmed
Sync Dependent: DATASETNAME INFOAREA LINKID FILTER
FI Institution (FI) null
PE Person (PE) null
04
no filter
Save

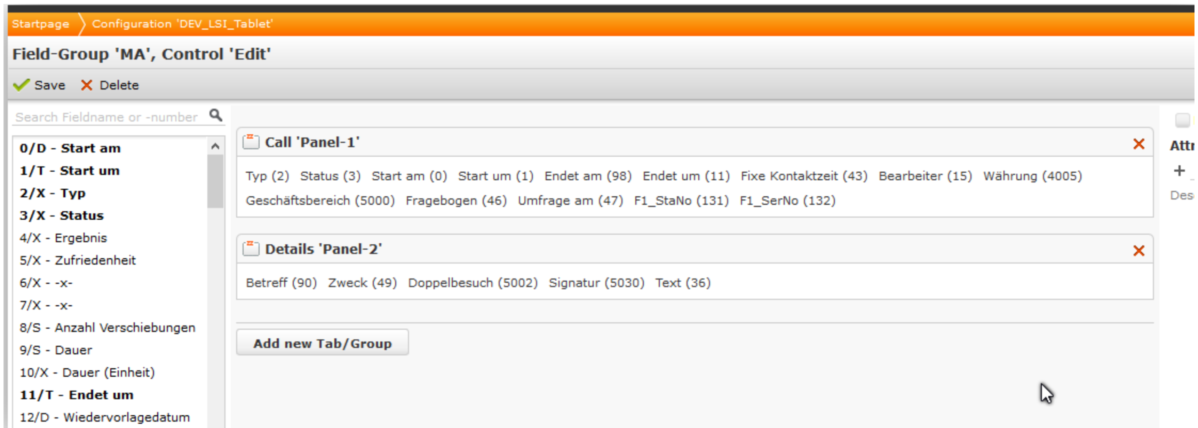

Offline Data Set 'U2'
Startpage
Configuration 'DEV_LSI_Tablet'
InfoArea: Umfrageergebnis (U2)
DisplayText:
Ignore:
Recordsets: TYPE NAME
none.
Filter
U2.Survey
Sync Dependent: DATASETNAME INFOAREA LINKID FILTER
U1 Umfrage (U1) null
04
no filter
Save

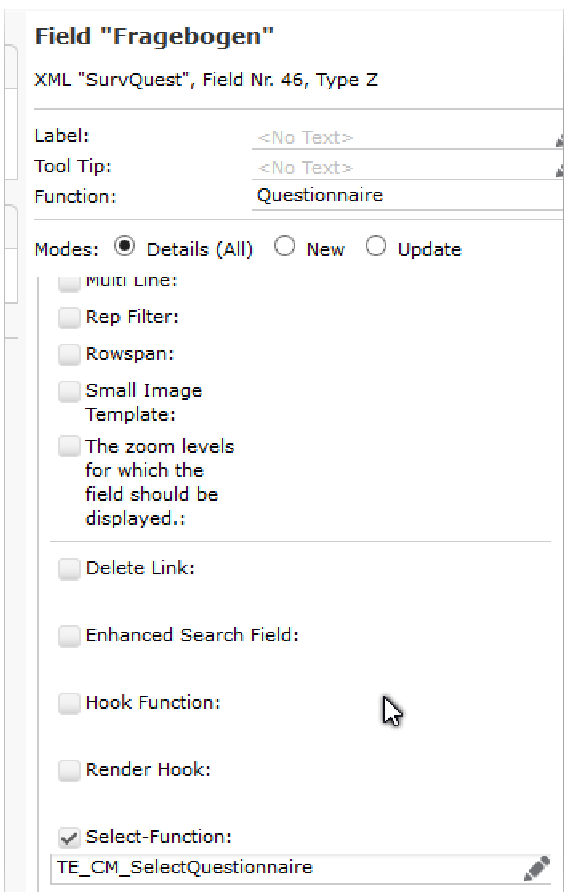
Entering a Questionnaire in an MA

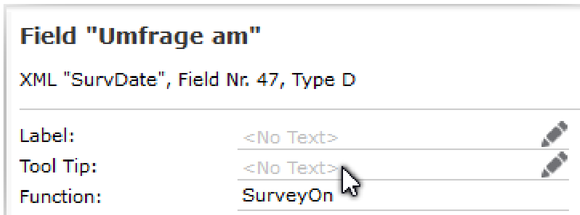
- **MA Edit Control**

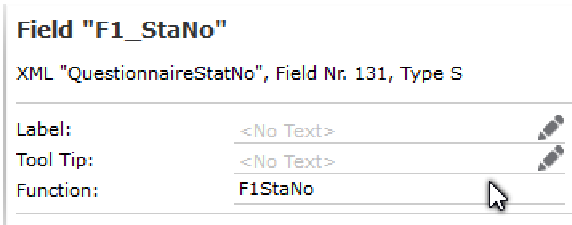
  In order to be able to enter a questionnaire in an MA record, 4 new fields have been added [ADD FIELD NAMES]. A record selector is defined for the Questionnaire field (46), which enters the questionnaire's unique key in the F1_StaNo and F1_SerNo fields. The following FunctionNames need to be entered for this purpose:

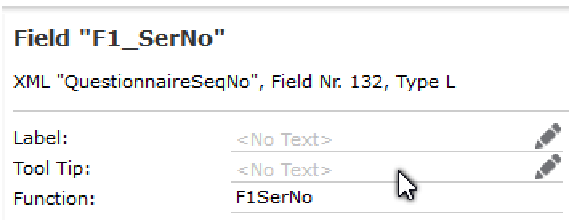
  The MACalendar.Edit and MANewFromPe.Edit field groups have been extended in the same manner as MA.Edit.



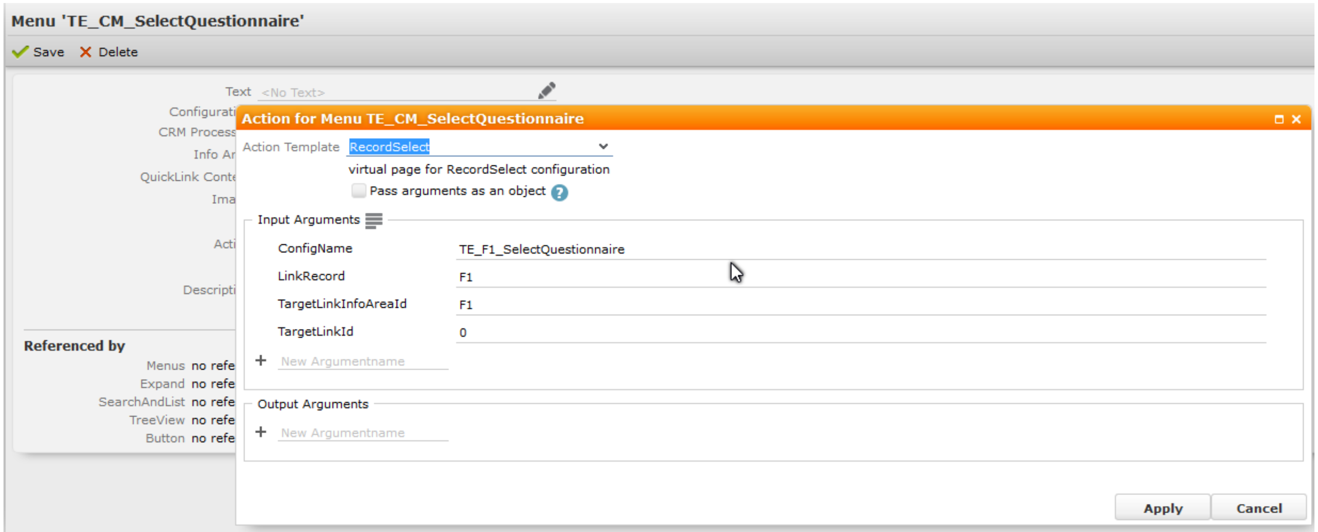



Field "Umfrage am"
XML "SurvDate", Field Nr. 47, Type D
Label: <No Text>
Tool Tip: <No Text>
Function: SurveyOn

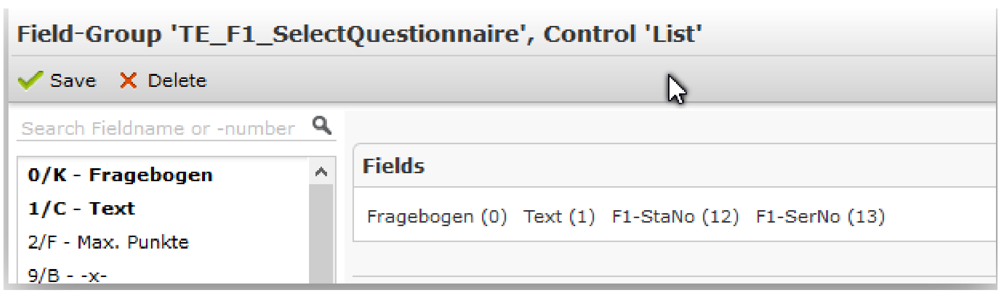

Field "F1_StaNo"
XML "QuestionnaireStatNo", Field Nr. 131, Type S
Label: <No Text>
Tool Tip: <No Text>
Function: F1StaNo

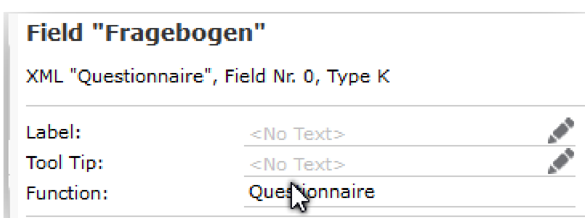

Field "F1_SerNo"
XML "QuestionnaireSeqNo", Field Nr. 132, Type L
Label: <No Text>
Tool Tip: <No Text>
Function: F1SerNo

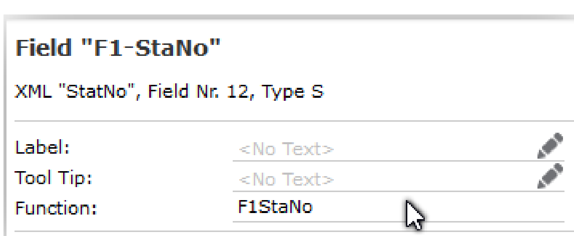
- **TE_CM_SelectQuestionnaire RecordSelector**

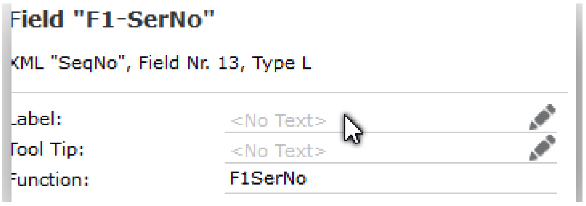


The FunctionNames in the TE_F1_SelectQuestionnaire Search&List's field group must be the same as the FunctionNames in MA.Edit.



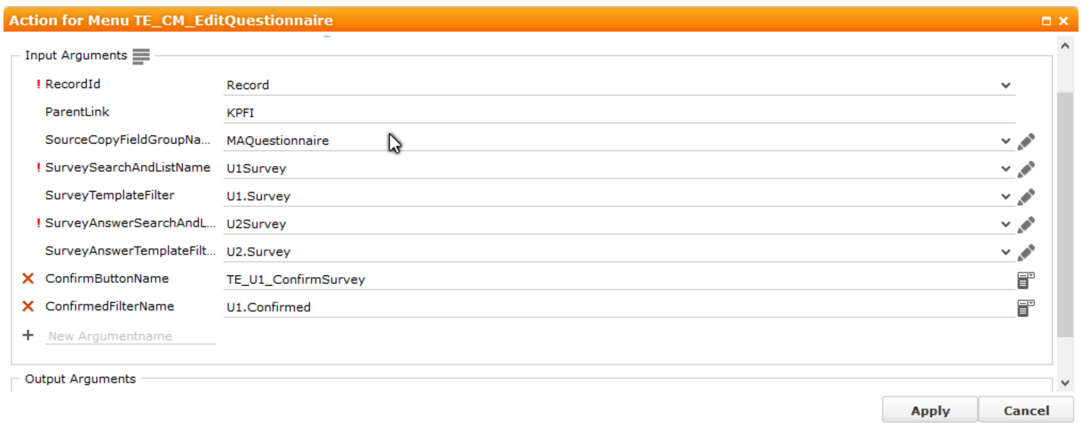






Accessing Questionnaires in the Call Documentation

The button in the process bar accesses the TE_CM_EditQuestionnaire context menu which can be used to fill out the questionnaire, and the TE_CM_QuestionnaireView action displays the questionnaire as defined in the MA expand.



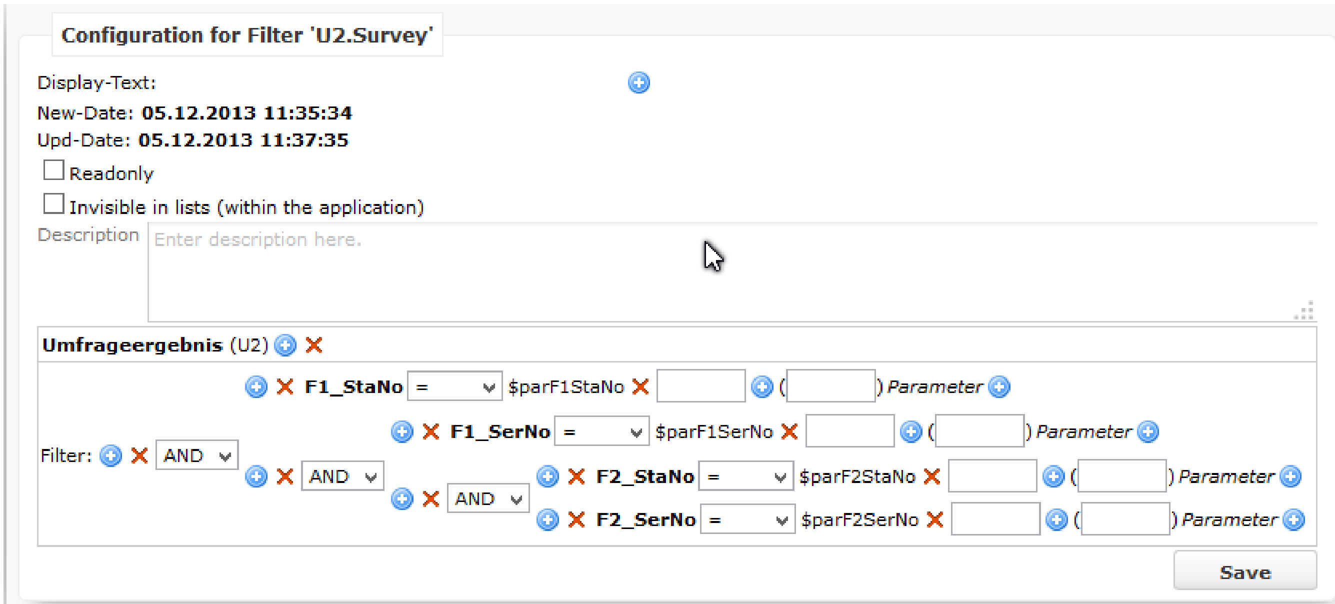
ConfirmedFilterName defines when the U1 is completed. Once a U1 has been completed, it is displayed in read-only mode.

Filters

- **U1.Survey**

  Returns all existing U1 where the $parSurveyDate matches the “Completed on” date in the MAQuestionnaire. In other words, the “Completed on” field in the MA must contain a value! The system also checks whether the U1 matches the questionnaire entered in the MA.

- **U2.Survey**



  Returns all questions in a questionnaire. The fields with corresponding Function-Names need to be added to the F1Quest, F2Quest and F3Quest list controls to do so.

Completing the Survey

The TE_U1_ConfirmSurvey button was added to TE_CM_EditQuestionnaire. This button uses the U1.ConfirmSurvey filter to set the “Completed” field to TRUE and the date to $curDay in the U1. The button also uses the MA.ConfirmSurvey filter to set the “Survey on” field in the MA to $curDay (in case the survey was completed on a different day from the activity).

Listing

Learn abaout the listing configurations.

Configuration:Listing

The context menu in the template is already suitably configured. However changes have been made to the Search&Lists and FieldControls referenced by it:

S&L PB Listing: The relationship type in the PB.Listing filter was changed to “inherits from”.

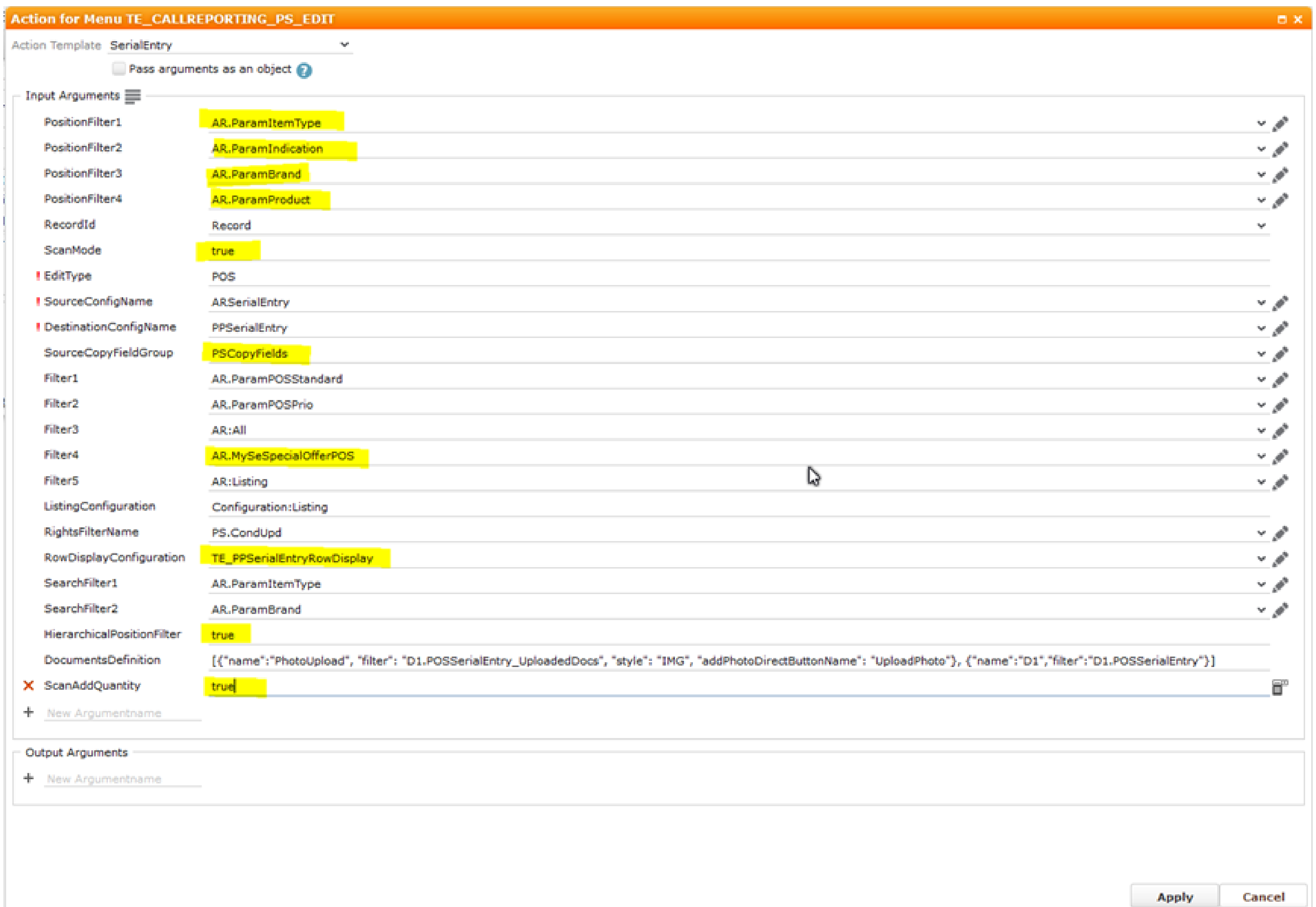
List.Control FIListing: The fields in the list control should match the fields in PB-Listing; these have been updated accordingly.

S&L LSListing: The LS.Listing filter is applied to determine the valid listings based on the validity period.

POS Monitoring

Learn about Point of Sale monitoring for CRM pad.

TE_CALLREPORTING_PS_EDIT ContextMenu

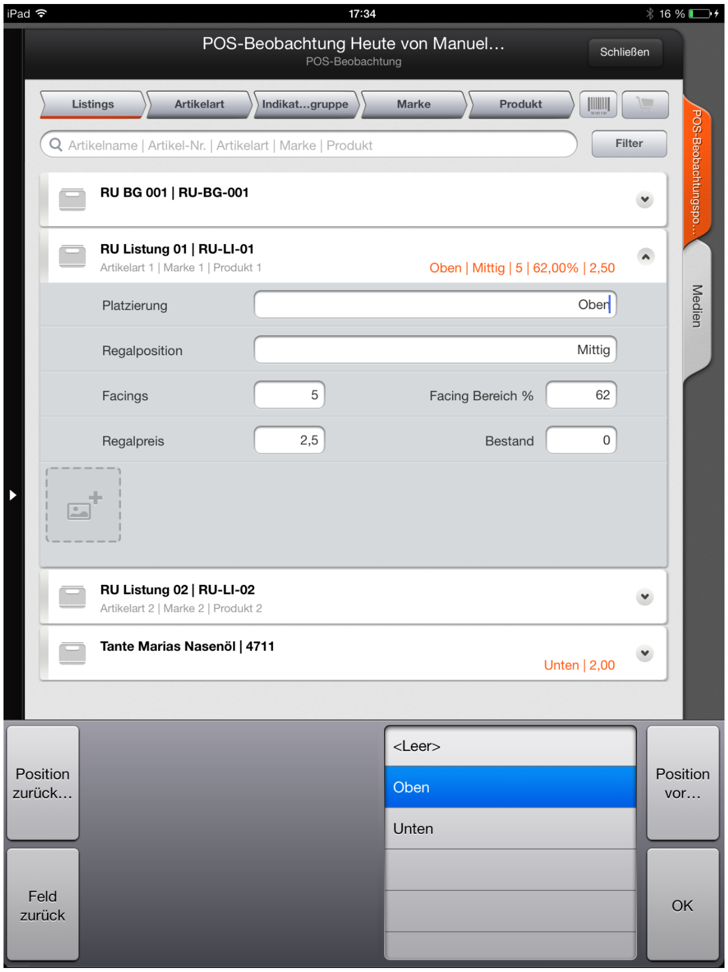


The item filters and the ScanMode were added as for orders, as well as those elements highlighted in yellow and that are described below.

Listing Filter

The AR:Listing filter and Configuration:Listing ListingConfiguration configure the listing filter in the POS Monitoring area.

Listing Value Preview in the PP Serial Entry



The fields in the serial entry area must be present in LSListing.List and assigned FunctionNames.

The desired fields in the PP info area can then be added to PPSerialEntry.Edit and assigned to the corresponding FunctionNames in LS. This enters the values in LS in the fields in the Edit view when opening a POS monitoring item.

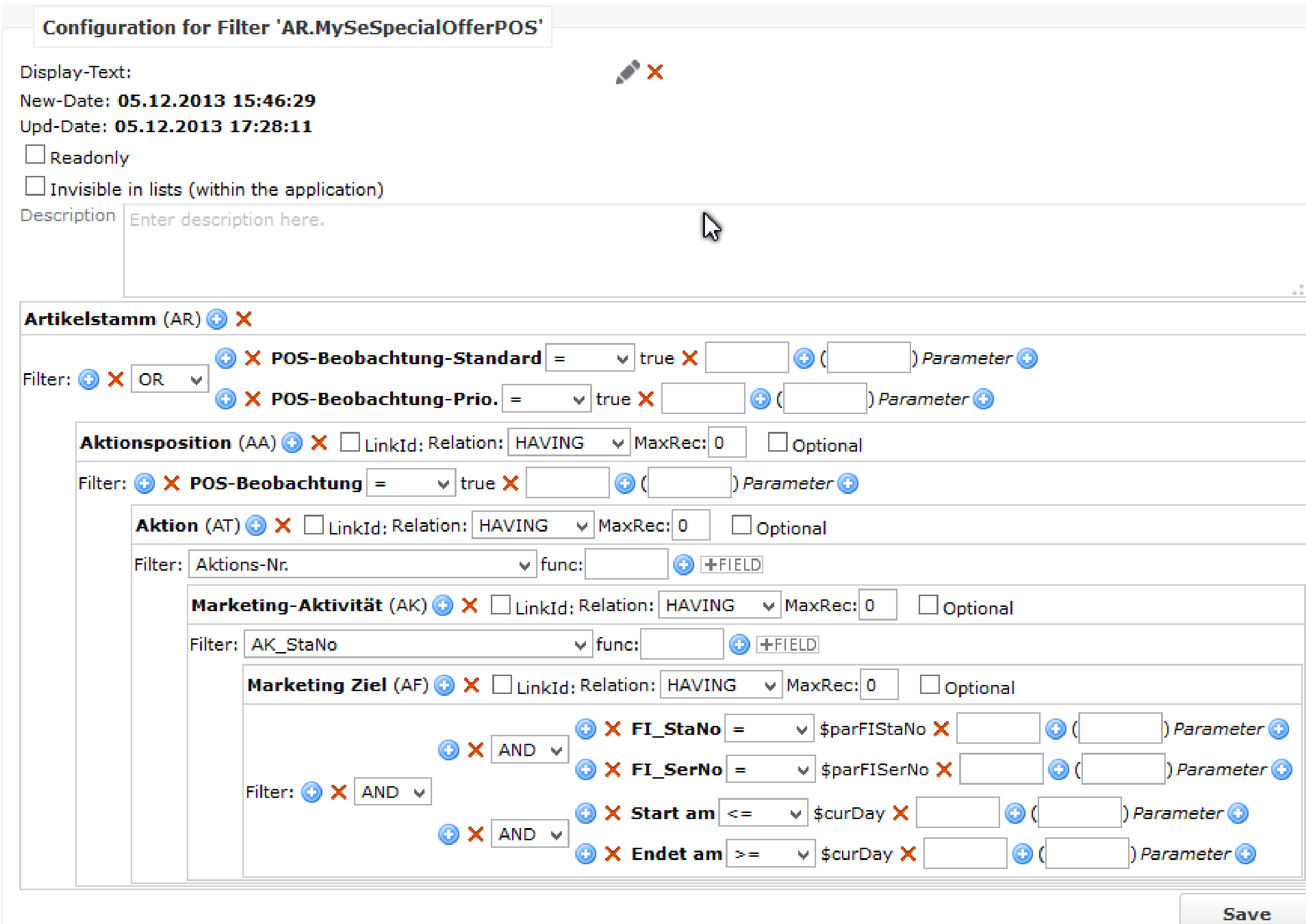
In order to also display the values in LS in the list, a RowDisplayConfiguration needs to be specified in the context menu. This FieldGroup’s list can then again include fields from PP and assigned to the corresponding FunctionNames in LS.

In general, PPSerialEntry can be also used for this purpose. As numerous fields were already present here (item name, item number etc.), that cluttered the display, a separate TE_PPSerialEntryRowDisplay FieldGroup was added. [If the surplus fields in PPSerialEntry.List are not required, these can be removed and this Field-Control can be specified as the RowDisplayConfiguration.]

Special Offer Filters in the PP Serial Entry

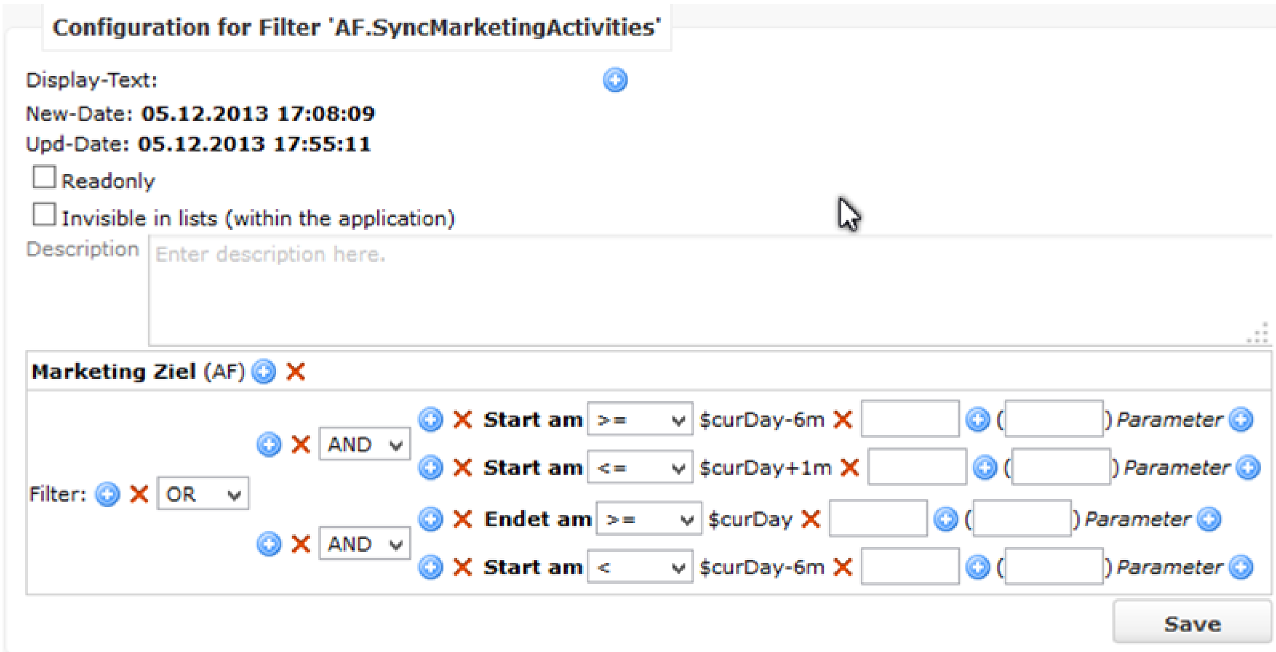
The AR.MySeSpecialOfferPOS filter has been added and entered in TE_CALLREPORTING_PS_EDIT. This filter only returns POS items with special offer items of the type POS monitoring, linked to a special offer linked to an AK with an AF assigned to the current company and that is currently valid.

In order to determine the current FI, the SourceCopyFieldGroup PSCopyFields was entered in TE_CALLREPORTING_PS_EDIT which contains the unique keys FI-StaNo and FI-SerNo.



Synchronizing AF

The offline record set settings for AF were changed by updating the AF.SyncMarketingActivities filter.

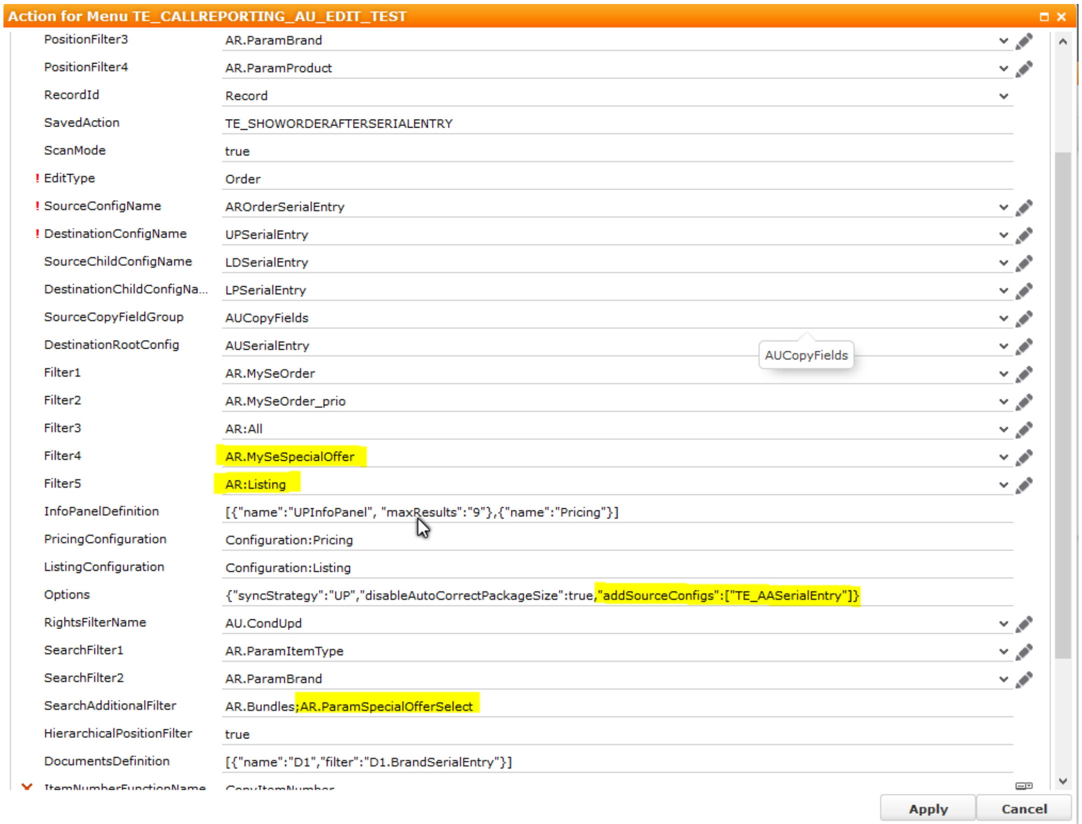


The previous filter was not really suited to synchronization.

All AF that started within the last 6 months and are due to start next month are now synchronized. All AF are also synchronized that started more than 6 months ago and are not closed.

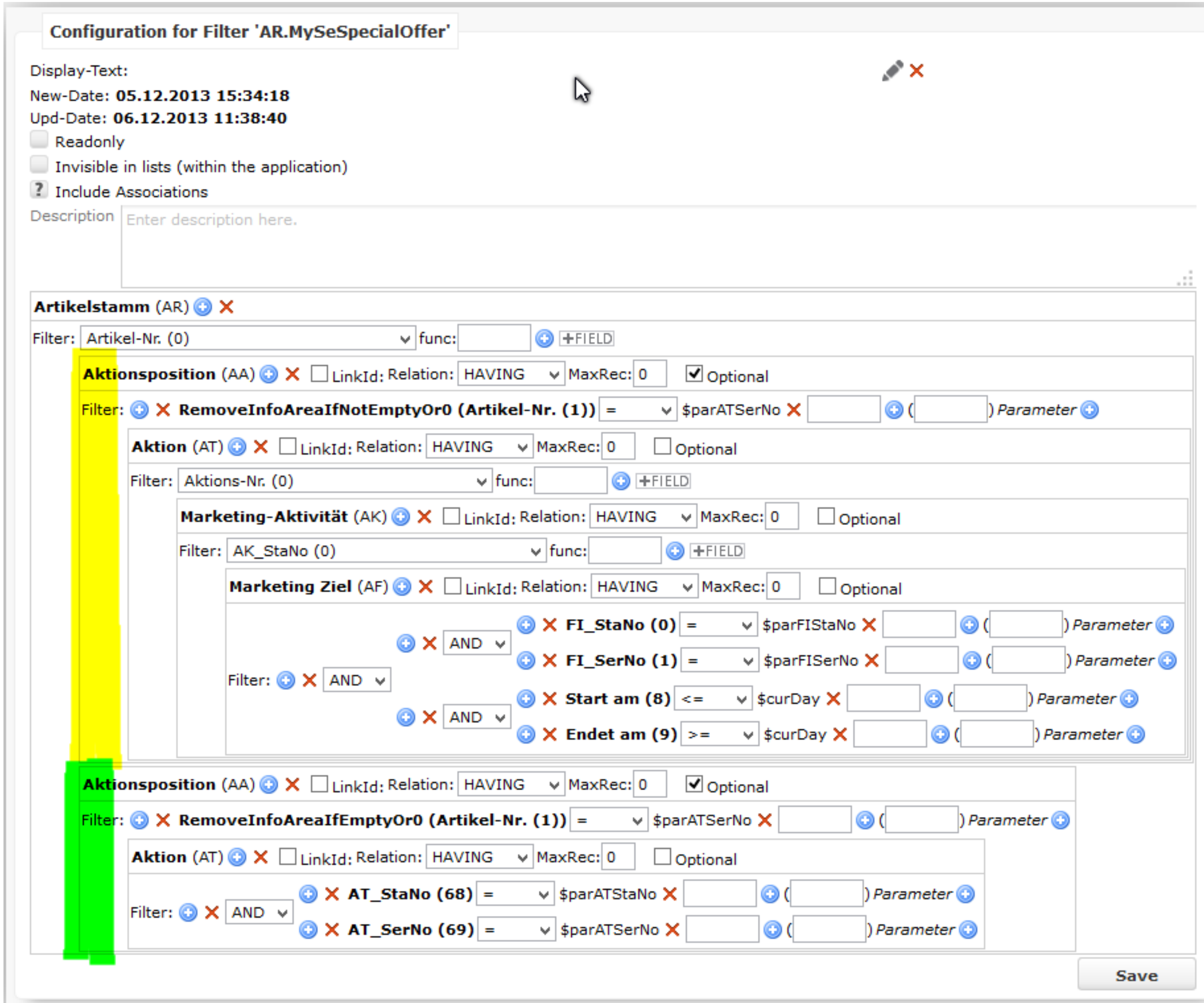
Entering Orders

Learn how to enter orders on CRM pad.



The Listing and Special Offer filters have been edited. The Listing filter is the same as for POS Monitoring, however if a listing item is defined multiple times for the same item, it is only displayed once (CRM.pad Business Logic). When entering order data, no preview is displayed automatically and no values are transferred from the listing items.

Special Offer Filter



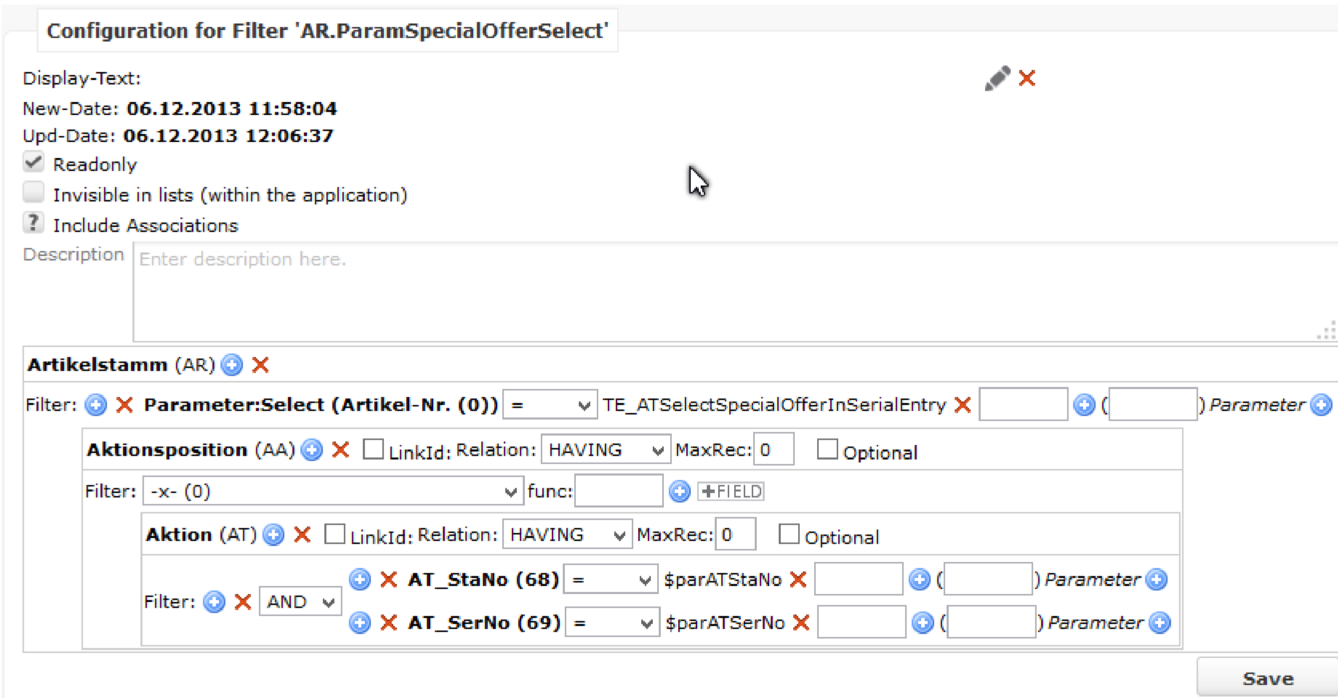
The Special Offer filter uses the following logic:

1. If a special offer has been entered in the order (header) record, only those items are displayed that are defined as special offer items for that special offer (green section).
2. If no special offer is entered in the order (header) record, only those items are displayed that are defined as special offer items for a special offer linked to a marketing activity with currently valid job cards (AF) for the current customer. (yellow section).

The `RemoveInfo areaIfEmptyOr0` and `RemoveInfo areaIfNotEmptyOr0` functions (you can ignore the field in parentheses) use the $parATSetNo parameter (from the SourceCopyFieldGroup of the SerialEntry) to determine which section is applied.

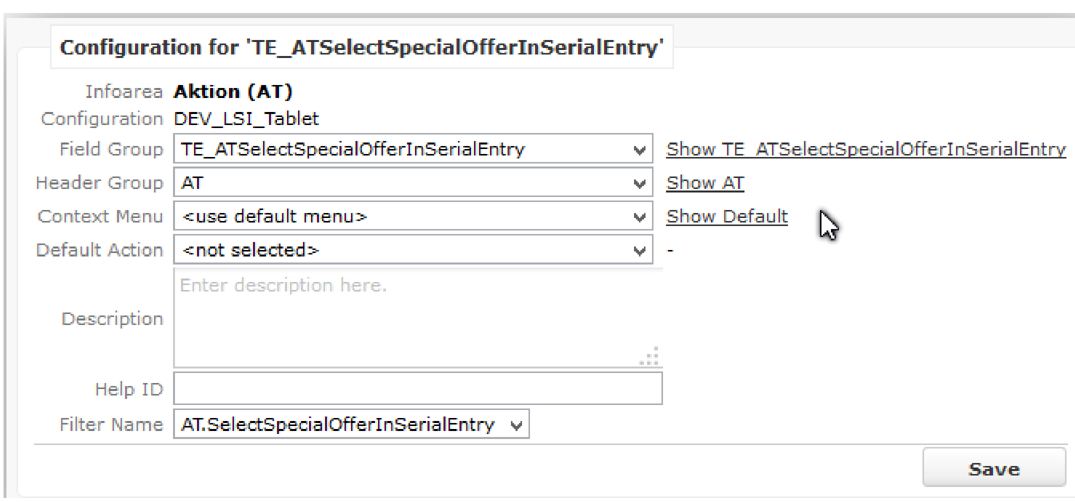
Selection Filter for Special Offers

As the logic applied by the yellow section allows several special offers to apply to an order, it is important to be able to differentiate these and select the desired one. The AR.ParamSpecialOfferSelect filter in the serial entry area serves this purpose. This filter can be used to restrict the items to one or more special offers.

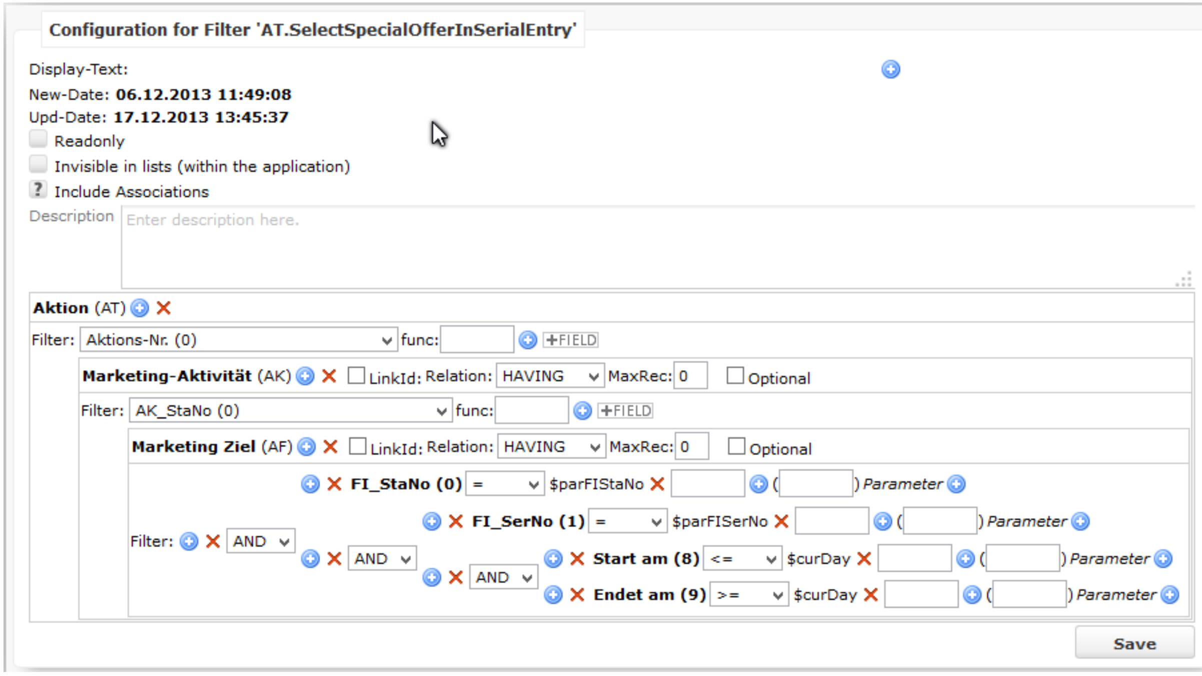


The Parameter:Select function (the field in parentheses can again be ignored) specifies the TE_ATSelectSpecialOfferInSerialEntry Search&List.

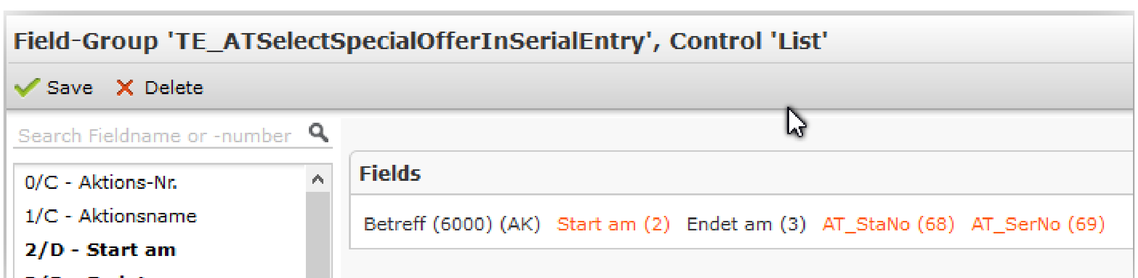
This Search&List defined what can be selected in the filter.



The AT.SpecialOfferInSerialEntry filter entered in the S&L applies more or less the same logic as the SpecialOfferFilter in the serial entry.



The ListControl in TE_ATSelectSpecialOfferInSerialEntry contains the fields that are displayed in the list of special offers. The AT_StaNo and AT_SerNo are also included and assigned FunctionNames. These function names are used by the AR.ParamSpecialOfferSelect filter to restrict the items to those defined for the selected special offers.

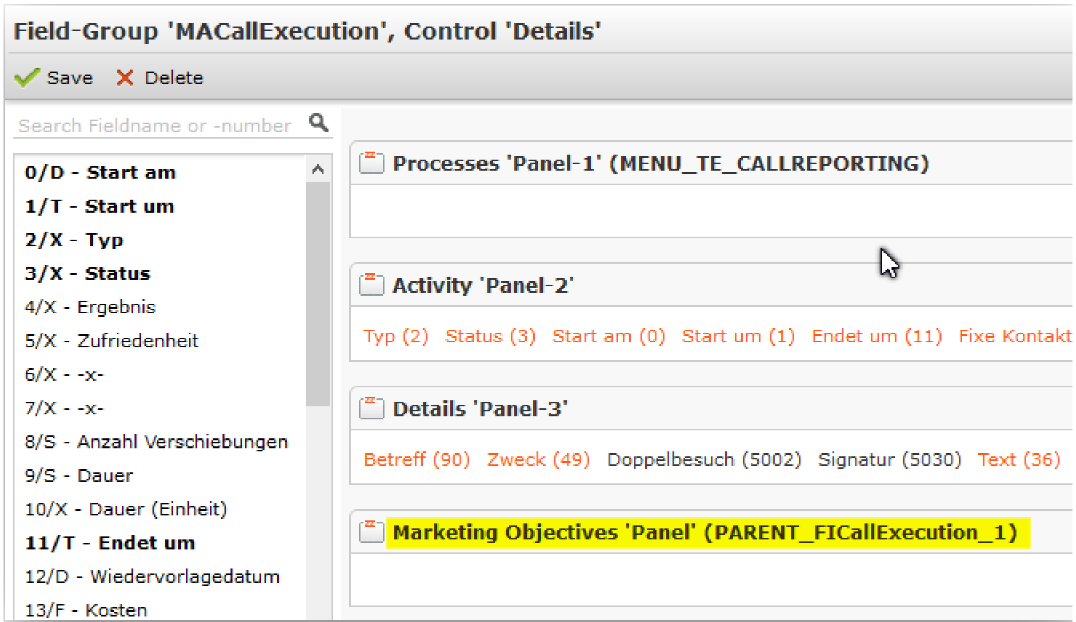


Displaying Job Cards (and Items) in a Visit

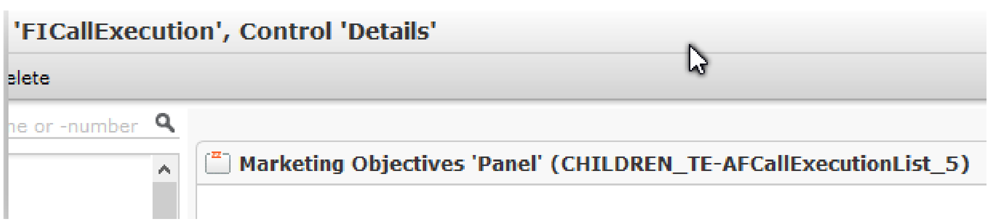
The details control in the call documentation process should display the job cards (AF) for the company. This is handled using a recursive PARENT or CHILDREN call.

Note: To ensure the correct execution of a Job Card, the value of the u8server rep in the Web Configuration parameter (UpdateServer.RepID) must have the ID value of the Rep defined on the u8server. Moreover, any default values for the executing rep-field in the AF infoarea should either be cleared or set to the ID value of the Rep on the u8server.

The PARENT_FICallExecution_1 tab has been added to the details control of the various MA groups (e.g. MACallExecution).



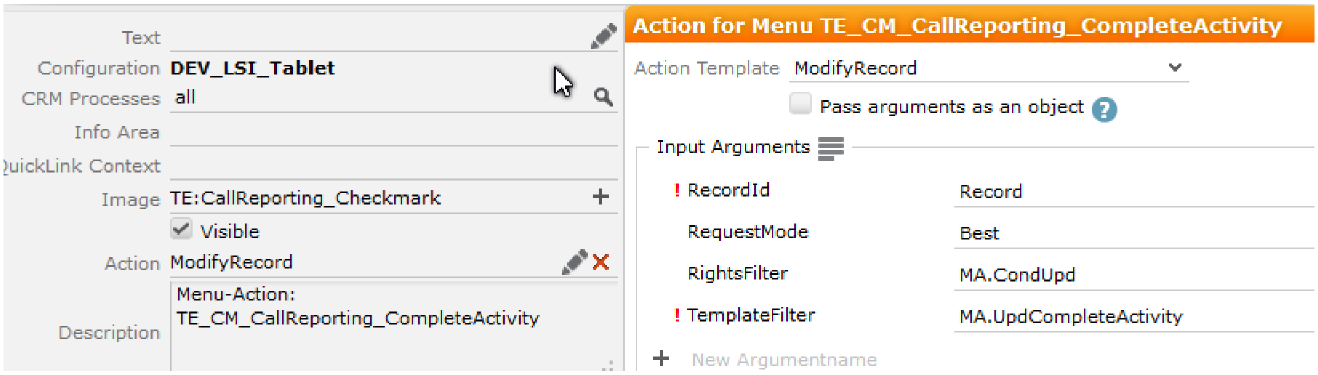
The FICallExecution details control contains the tab CHILDREN_TE-AFCallExecutionList_5, which is used to display the job cards for a company.



Displaying special offer items in the job card’s details control is handled in the same manner as in AF, AK, AT and the AA Search&List.

Completing Activities

The process bar in the call documentation process includes a new button (check mark) that calls a ModifyRecord and sets the status of the MA to “Completed”.


Text
Configuration DEV_LSI_Tablet
CRM Processes all
Info Area
QuickLink Context
Image TE:CallReporting_Checkmark
Visible
Action ModifyRecord
Description Menu-Action: TE_CM_CallReporting_CompleteActivity
Action for Menu TE_CM_CallReporting_CompleteActivity
Action Template ModifyRecord
Pass arguments as an object
Input Arguments
! RecordId Record
RequestMode Best
RightsFilter MA.CondUpd
! TemplateFilter MA.UpdCompleteActivity
New Argumentname

6

OneKey Interface

Introduction to the OneKey Interface

Wording:

- Cegedim is the company's or product's name.
- OneKey is the specific data pool's name.

This import/export-interface enables a customer to synchronize data between OneKey Pool database and Aurea CRM asynchronously. Data is kept up-to-date and consistent on both sides. We are using Aurea CRM's import/export module called by a script file.

Note: This interface is part of the template but it needs customizing and manual steps before using it in a project. Don't expect a single-click installation!

Installations at customer's projects might differ from this documentation in terms of folder structure, settings in batch files and file formats.

OneKey catalog values are not part of the template. This needs to be imported manually in every project.

LSI-Template Solution

Learn about the use cases and data flow of the LSI template in this topic.

- **What is included in the template?**
  - Import-/Export-formats
  - Variable Catalogs values (with OneKey-tenant 9002) for some catalogs.
  - Triggers
  - Workflows

- Variables
- Web-Customizing

- **What is not included in the template?**
  - Relation (PB) and Relationship Level (B5) records
  - Catalog values have to be imported manually (see chapter Import of catalogs)!

- **Where can I find it?**

  Please go to https://support.aurea.com.

Usecases and Data Flow

1. OneKey Updates (OneKey   Client)

   This service delivers all the data that has been updated since the previous delivery. In the initial delivery all the data subscribed by the client are sent. A processing code indicates the action to perform: “I” for Insert, “U” for Update, “R” for entities that are re-sent following client request and ‘D’ for entities that has been removed from the target group.

2. Validation Requests (Client   OneKey)

   This service allows validating client data based on OneKey reference database. The database operators compare the validation request data with OneKey data and after investigation and phone verification, can accept or reject the client request. A validation report is delivered back to the client with the answer (Accepted/Rejected) and a comment from the database operator in case of reject. OneKey database might be updated if needed. OneKey data is sent to the client in case of an update/creation or even in case of a simple verification with no modification (reset option).

The requests can involve:

- New entities that Cegedim don’t have or that were not sent to the client (out of target group) => creation requests
- Existing entities, already sent to the client => update requests

More generally, the client might not know if it’s a creation or update request. The core idea is that the client provides the information he has in order that Cegedim check its validity. One of the most important information to provide is the Cegedim OneKey id (for update requests).

Workplace validation request: Cegedim validates the existence or not of a workplace or one of its department based on mainly its address and name

Activity validation request: Cegedim validates the existence or not of an activity for a given individual and address (or workplace). The workplace is identified by its address or name and the individual by its name and type.

OneKey Interface

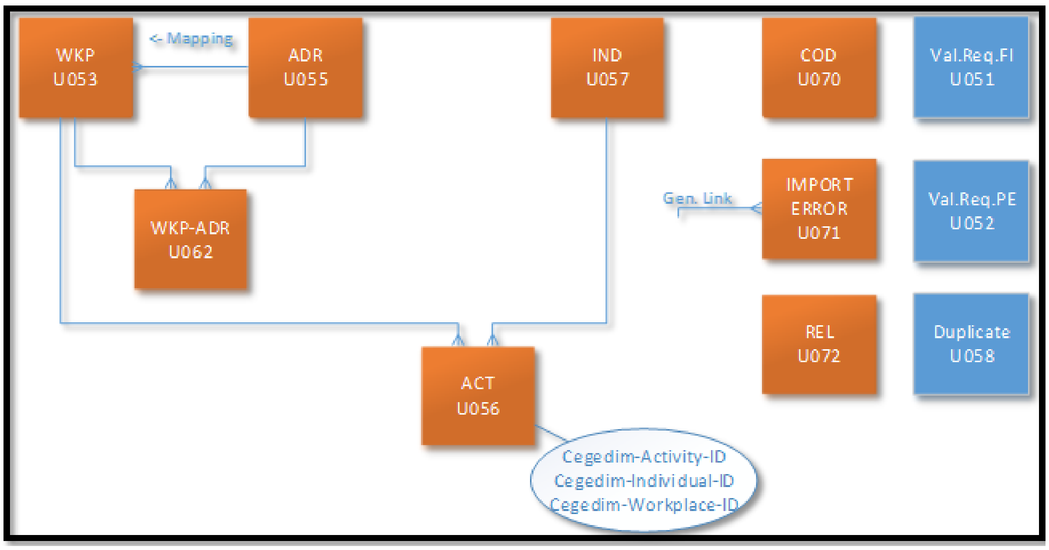
OneKey Connect is one of the solutions that Cegedim proposes to its customers to deliver its worldwide medical database.

There is an inbound and outbound process.

Inbound consists of DOWNLOAD, FILLSTAGINGAREA, RESPONSE and TRANSFER.

Outbound consists of REQUEST and UPLOAD. For more details see the VISIO charts.

Datamodel



OneKey Interface Description

The OneKey database contains all the medical professionals and the national healthcare systems structure.

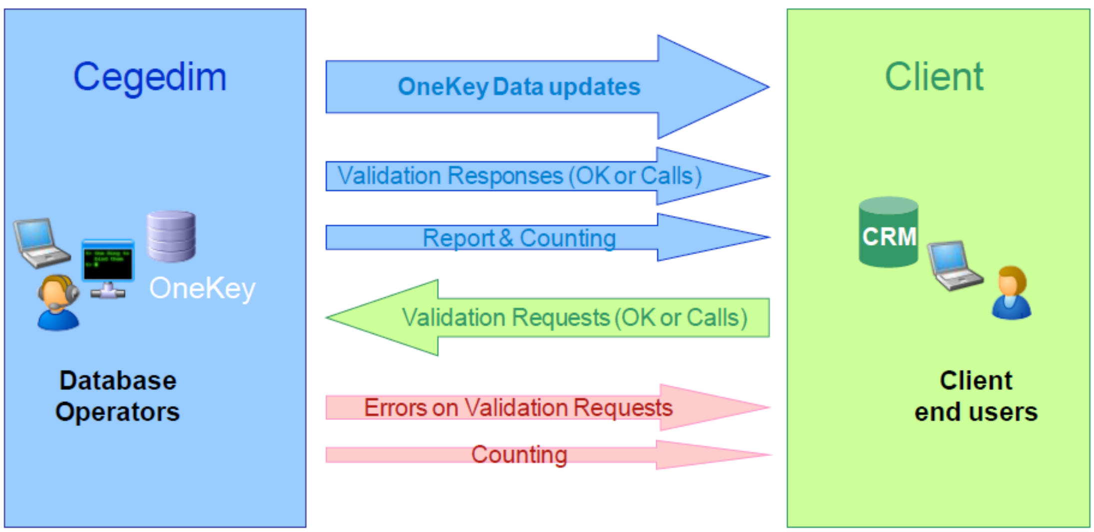
The main features of OneKey Connect solution are:

- daily delivery of OneKey updates
- daily processing of customer updates requests and calls validation including validation responses delivery
- regular delivery of added value data such as Cegedim RM consolidated data

Main Principles

Several data flows have been developed to exchange Cegedim OneKey data and Client validation requests. The different data flows are split in three OKC packages:

- OK (OneKey) package: contains all the OneKey updates files, the validation response files and the reports & counting files.
- VR (Validation Request) package: contains all the client validation requests (OneKey creation/update requests or doctor visit dates validation requests).
- VR_REPORT (Validation Request Report): contains the errors report on the client validation requests submitted by the client in VR package and counting on the validation requests received.



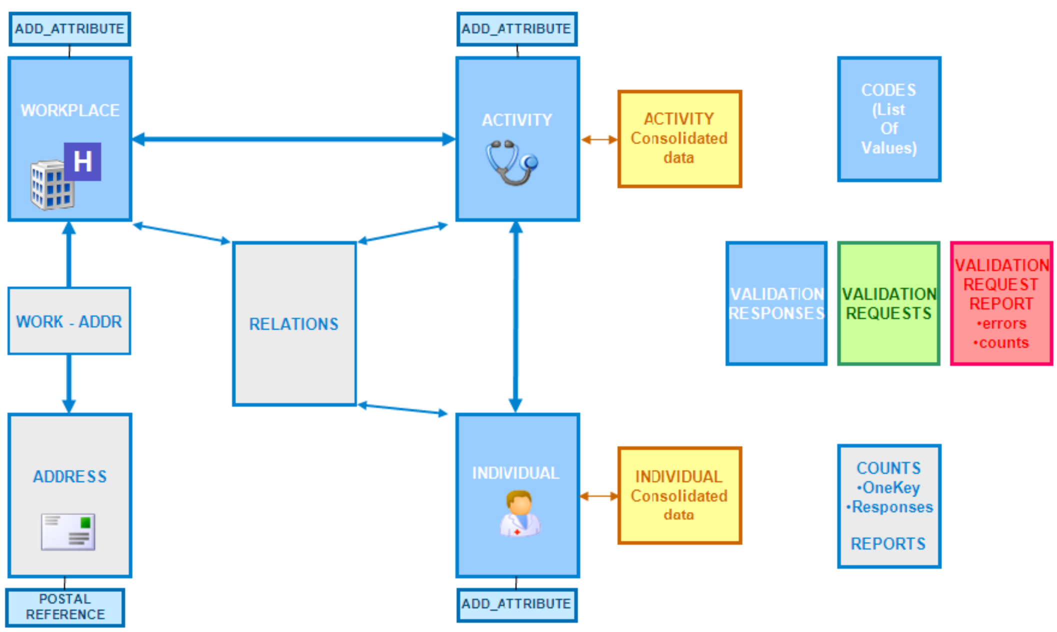
The following table lists all the data flows embedded in the different OneKey Connect packages:

Type of data flow	Description	From / To	Files set	OKC Package
OneKey updates	OneKey updates done by Cegedim database department. Only for this data flow, the extraction mode options (data, main object, complete) are applicable.	from Cegedim to Client ( )	"WORKPLACE", "ACTIVITY", "INDIVIDUAL", "WORKPLACE_ADDRESS", "ADDRESS", "IAE_RELATION", "CODE"	"OK"
Validation Responses	Validation of OneKey update requestssubmitted by the client and Call date validation	from Cegedim to Client ( )	"VALIDATION_RESPONSE"	"OK"
Counting	Counting on entity delivered in “OK” package	from Cegedim to Client ( )	"ALL_COUNTING_ONEKEY", “ALL_COUNTING_VALIDATION_RESPONSE”	"OK"
Reporting	Report on every delivery done by Cegedim	from Cegedim to Client ( )	"ALL_REPORT"	"OK"
OneKey or Calls Validation Requests	OneKey Validation Requests done by Client end users or Call Validation Requests (to participate to consolidated data calculation)	from Client to Cegedim ( )	"WORKPLACE_VALIDATION_REQUEST", "ACTIVITY_VALIDATION_REQUEST”	"VR"

Type of data flow	Description	From / To	Files set	OKC Package
Validation Requests Errors	Error report on erroneous validation requests submitted by the client	from Cegedim to Client ( )	"WORKPLACE_VALIDATION_REQUEST", "ACTIVITY_VALIDATION_REQUEST”	"VR_REPORT"
Validation Requests Counting	Counting on validation requests submitted by the client	from Cegedim to Client ( )	“ALL_COUNTING_VALIDATION_REQUEST”	"VR_REPORT

OneKey Data Structure

The structure of the delivered OneKey data is given below:



Inbound Process IN

Is called by “OneKey.exe IN” and is calling function FillStagingArea and TransferStagingArea_2_CRM respectively Inbound Process FILLSTAGINGAREA and Inbound Process TRANSFER.

Inbound Process FILLSTAGINGAREA

Learn about the filling the staging area for the inbound process.

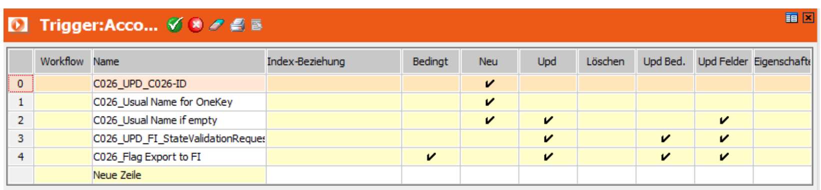
Can be called with parameter “OneKey.exe FILLSTAGINGAREA” which is calling the following code in AutoIt: Func `FillStagingArea($PathString, $CounterString, $TimestampString)`.

Download of new `.zip` file from the cegedim server and extracting of `.flat` files.

1a. Dataflow VALIDATION_RESPONSE Accounts

Matchup and update Importformat “IMP_OneKey_C026_Account_Responses” sets C026 date fields, building C026-StaNo, C026-SerNo and sets field “Pool Clearing state” to “from Pool”.

The following triggers are defined for C026:


Trigger:Acco...

	Workflow	Name	Index-Beziehung	Bedingt	Neu	Upd	Löschen	Upd Bed.	Upd Felder	Eigenschafte
0		C026_UPD_C026-ID			✔					
1		C026_Usual Name for OneKey			✔					
2		C026_Usual Name if empty			✔	✔			✔	
3		C026_UPD_FI_StateValidationReque:				✔		✔	✔	
4		C026_Flag Export to FI		✔		✔		✔	✔	
		Neue Zeile								

Line	Name	Condition	Condition	New	Upd	Del	Cond.Upd.	Cond.Upd.	Upd Fields	Upd Fields
0	C026_UPD_C026-ID			☑						
1	C026_Usual Name for OneKey			☑						
2	C026_Usual Name if empty			☑	☑				☑	52 Usual Name
3	C026_UPD_FI_StateValidationRequest				☑		☑	Pool Clearing state ==zu clearen	☑	41 Pool Clearing state
4	C026_FlagExport to FI	☑	Cegedim-WKP-ID == ""		☑		☑	Cegedim-WKP-IDvalidated == ""	☑	40 Cegedim-WKP-ID

Line 0: Trigger “C026_UPD_C026-ID”

Build C026-ID from StaNo “-“ SerNo.

Line 1: Trigger “C026_Usual Name for OneKey

”Set field “Usual name” from field “Firma 1 (Usual))” - “Firma 4 (Usual))” with condition on field “hierarchy”.

Line 2: Trigger “C026_Usual Name if empty”

Set field “Usual name” from field “account name” if “Usual name” is empty.

Line 3: Trigger “C026_UPD_FI_StateValidationRequest”

Set field “Pool Clearing state” from reference Account Validation Request.

Line 4: Trigger “C026_Flag Export to FI”

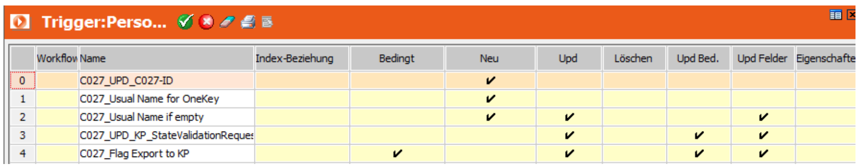
Set field “Export to XF” to true.

1b. Dataflow VALIDATION_RESPONSE Persons

Same dataflow as described in previous topic.

Matchup and update Importformat “IMP_OneKey_C027_Person_Responses” sets C027 date fields, building C027-StaNo, C027-SerNo and sets field “Pool Clearing state” to “from Pool”.

The following triggers are defined for C027:



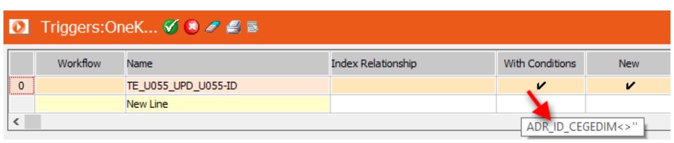
2. Dataflow ADDRESS

Import from flat file to staging table

The file “CEGEDIM_UPDATEDE_1285_OK_DE_ADDRESS_0000000003_20140207081930.flat” is imported by the format “TE_IMP_OneKey_U055_Address” to staging infoarea U055.

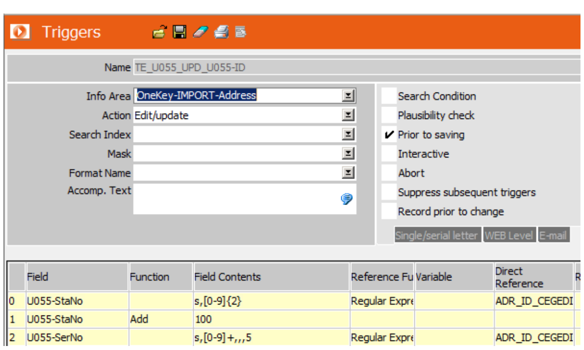
Triggers

The following trigger is defined for U055:



Line 0: Trigger “TE_U055_UPD_U055-ID

The trigger transforms the external ID “ADR_ID_CEGEDIM” to a unique Station and Serial Number. Set U055-StaNo and U055-SerNo from ADR_ID_CEGEDIM by a regular expression. U055-SerNo is the last id of the ADR_ID_CEGEDIM field

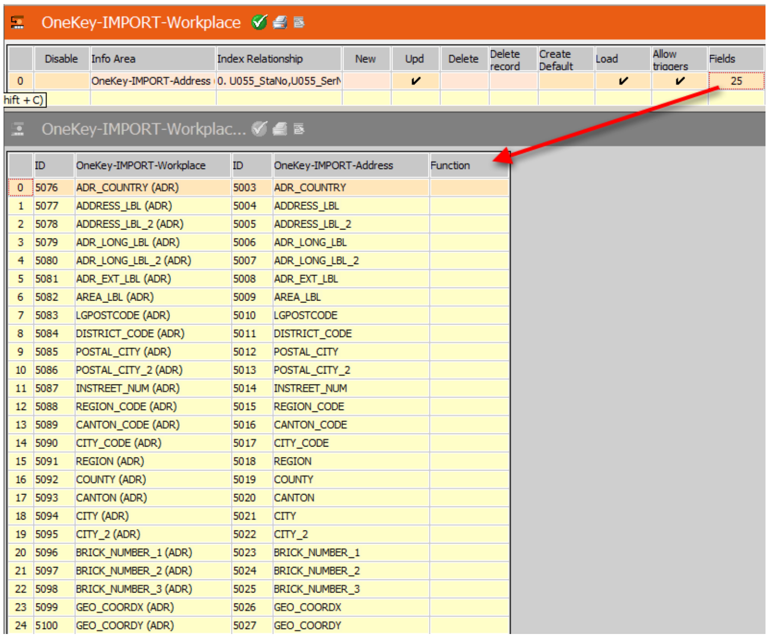


3. Dataflow WORKPLACE

- **Import from flat file to staging table**

  The file “CEGEDIM_UPDATEDE_1285_OK_DE_WORKPLACE_0000000003_20140207081930.flat” is imported by the format “TE_IMP_OneKey_U053_Workplace” to staging infoarea U053.

- ## Datamodel Mapping

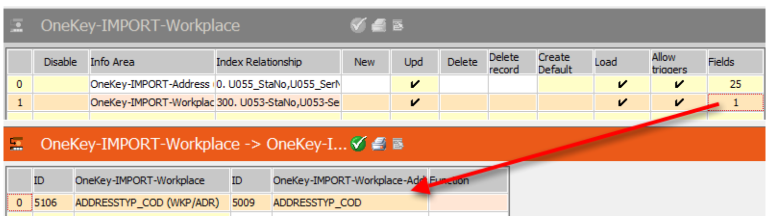


OneKey-IMPORT-Workplace

	Disable	Info Area	Index Relationship	New	Upd	Delete	Delete record	Create Default	Load	Allow triggers	Fields
0		OneKey-IMPORT-Address	0. U055_StaNo,U055_SerN		✔				✔	✔	25

OneKey-IMPORT-Workplac...

	ID	OneKey-IMPORT-Workplace	ID	OneKey-IMPORT-Address	Function
0	5076	ADR_COUNTRY (ADR)	5003	ADR_COUNTRY	
1	5077	ADDRESS_LBL (ADR)	5004	ADDRESS_LBL	
2	5078	ADDRESS_LBL_2 (ADR)	5005	ADDRESS_LBL_2	
3	5079	ADR_LONG_LBL (ADR)	5006	ADR_LONG_LBL	
4	5080	ADR_LONG_LBL_2 (ADR)	5007	ADR_LONG_LBL_2	
5	5081	ADR_EXT_LBL (ADR)	5008	ADR_EXT_LBL	
6	5082	AREA_LBL (ADR)	5009	AREA_LBL	
7	5083	LGPOSTCODE (ADR)	5010	LGPOSTCODE	
8	5084	DISTRICT_CODE (ADR)	5011	DISTRICT_CODE	
9	5085	POSTAL_CITY (ADR)	5012	POSTAL_CITY	
10	5086	POSTAL_CITY_2 (ADR)	5013	POSTAL_CITY_2	
11	5087	INSTREET_NUM (ADR)	5014	INSTREET_NUM	
12	5088	REGION_CODE (ADR)	5015	REGION_CODE	
13	5089	CANTON_CODE (ADR)	5016	CANTON_CODE	
14	5090	CITY_CODE (ADR)	5017	CITY_CODE	
15	5091	REGION (ADR)	5018	REGION	
16	5092	COUNTY (ADR)	5019	COUNTY	
17	5093	CANTON (ADR)	5020	CANTON	
18	5094	CITY (ADR)	5021	CITY	
19	5095	CITY_2 (ADR)	5022	CITY_2	
20	5096	BRICK_NUMBER_1 (ADR)	5023	BRICK_NUMBER_1	
21	5097	BRICK_NUMBER_2 (ADR)	5024	BRICK_NUMBER_2	
22	5098	BRICK_NUMBER_3 (ADR)	5025	BRICK_NUMBER_3	
23	5099	GEO_COORDX (ADR)	5026	GEO_COORDX	
24	5100	GEO_COORDY (ADR)	5027	GEO_COORDY	



OneKey-IMPORT-Workplace

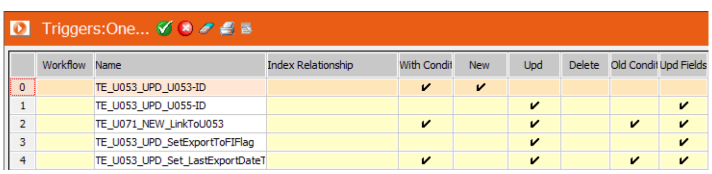
	Disable	Info Area	Index Relationship	New	Upd	Delete	Delete record	Create Default	Load	Allow triggers	Fields
0		OneKey-IMPORT-Address	0. U055_StaNo,U055_SerN		✔				✔	✔	25
1		OneKey-IMPORT-Workplac	300. U053-StaNo,U053-Se		✔				✔	✔	1

OneKey-IMPORT-Workplace -> OneKey-I...

	ID	OneKey-IMPORT-Workplace	ID	OneKey-IMPORT-Workplace-Add	Function
0	5106	ADDRESSTYP_COD (WKP/ADR)	5009	ADDRESSTYP_COD	

- ## Triggers

  The following triggers are defined for U053:



Triggers:One...

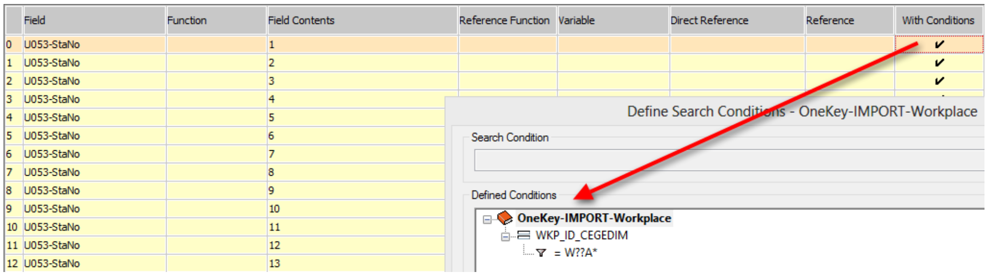
	Workflow	Name	Index Relationship	With Condit	New	Upd	Delete	Old Condit	Upd Fields
0		TE_U053_UPD_U053-ID		✔	✔				
1		TE_U053_UPD_U055-ID				✔			✔
2		TE_U071_NEW_LinkToU053		✔		✔		✔	✔
3		TE_U053_UPD_SetExportToFIFlag				✔			✔
4		TE_U053_UPD_Set_LastExportDateT		✔		✔		✔	✔

Line	Name	Condition	Condition	New	Upd	Del	Cond.Upd.	Cond.Upd.	Upd Fields	Upd Fields
0	TE_U053_UPD_U053-ID	☑	WKP_ID_CEGEDIM <>	☑						
1	TE_U053_UPD_U055-ID				☑				☑	ADR_ID_CEGEDIM
2	TE_U071_NEW_LinkToU053	☑	Import error == Yes		☑		☑	Import error == "	☑	Import error
3	TE_U053_UPD_SetExportToFIFlage				☑				☑	any pool fields
4	TE_U053_UPD_Set_LastExportDateTime	☑	Export to FI == No		☑		☑	Export to FI == Yes	☑	Export to FI

- ### Line 0: Trigger “TE_U053_UPD_U053-ID”

  Set U053-StaNo

  (lines 0 to 25)



Set U053-SerNo (line 26):

The direct reference field WKP_ID_CEGEDIM (e.g.: „WDEF00000002“) is stripped to an unique serial number by means of regular expression “s,[0-9]+,,,4”.

	Field	Function	Field Contents	Reference Function	Variable	Direct Reference
26	U053-SerNo		s,[0-9]+,,,4	Regular Expression		WKP_ID_CEGEDIM

- **Line 1: Trigger “TE_U053_UPD_U055-ID”**

Name	TE_U053_UPD_U055-ID
Info Area	OneKey-IMPORT-Workplace
Action	Edit/update
Search Index	
Mask	
Format Name	
Accomp. Text	Set U055_StaNo/SerNo from ADR_ID_CEGEDIM. Clear copied

Search Condition
Plausibility check
Prior to saving
Interactive
Abort
Suppress subsequent triggers
Record prior to change

Single/serial letter | WEB Level | E-mail

	Field	Function	Field Contents	Reference Fu	Variable	Direct Reference	Reference	With Cond
0	U055_StaNo	Mul	0					
1	U055_SerNo	Mul	0					
2	U055_StaNo		s,[0-9]{2}	Regular Expre		ADR_ID_CEGEDI		✔
3	U055_StaNo	Add	100					✔
4	U055_SerNo		s,[0-9]+,,,5	Regular Expre		ADR_ID_CEGEDI		✔
5	ADR_COUNTRY							✔
6	ADDRESS_LBL							✔
7	ADDRESS_LBL_2							✔
8	ADR_LONG_LBL							✔
9	ADR_LONG_LBL_2							✔
10	ADR_EXT_LBL							✔
11	AREA_LBL							✔
12	LGPOSTCODE							✔
13	DISTRICT_CODE							✔
14	POSTAL_CITY							✔
15	POSTAL_CITY_2							✔
16	INSTREET_NUM							✔
17	REGION_CODE							✔
18	CANTON_CODE							✔
19	CITY_CODE							✔
20	REGION							✔
21	COUNTY							✔
22	CANTON							✔
23	CITY							✔
24	CITY_2							✔
25	BRICK_NUMBER_1							✔
26	BRICK_NUMBER_2							✔
27	BRICK_NUMBER_3							✔
28	GEO_COORDX							✔
29	GEO_COORDY							✔

U053 is linked to U055 as a child. On UPDATE of field ADR_ID_CEGEDIM (U053.5075) build the correct link:

Line 0,1: Delete fields U055-StaNo, U055-SerNo.

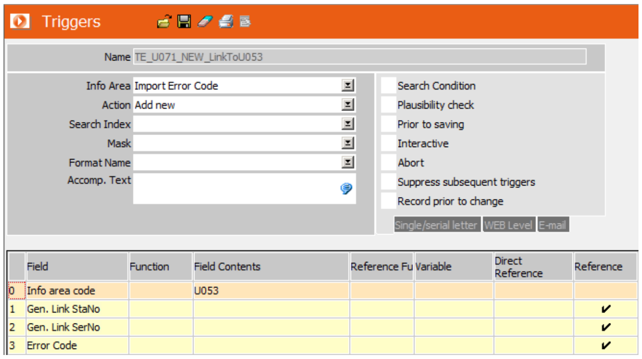
Line 2-3 Set U055-StaNo from field ADR_ID_CEGEDIM via regular expression “s,[0-9]{2}” and Add 100.

Line 4: Set U055-SerNo from field ADR_ID_CEGEDIM via regular expression “s,[0-9]+,,,5”.

Line 5 to 29: Clear ADRESS-fields if ADR_ID_CEGEDIM is empty.

- **Line 2: Trigger “TE_U071_NEW_LinkToU053”**

  If field “Import error” is true, create a new U071-record and link it to the calling U053-record.



- **Line 3: Trigger “TE_U053_UPD_SetExportToFIFlag”**

  Set field U053.5103 “Export to FI?” to true if any pool data fields have been changed.

- **Line 4: Trigger “TE_U053_UPD_Set_LastExportDateTime”**

  Set field “Last Export Date” and “Last Export Time” if field “Export to FI?” is reset to false.

4. Dataflow WORKPLACE_ADDRESS_RELATION

- **Import from flat file to staging table**

  The file "..._OK_DE_WORKPLACE_ADDRESS_RELATION_...flat" is imported by theformat"TE_IMP_OneKey_U062_WorkplaceAddressRelation"tostaginginfoarea U062.

- **Triggers**

  The following triggers are defined for U062:

Triggers:OneKey...

	Workflow	Name	Index Relationsl	With Conditio	New	Upd	Delete	Old Condition	Upd Fields
0		TE_U062_UPD_Set_LinkToU053/U055		✔	✔	✔			
1		TE_U053_UPD_Set_ADR_ID_CEGEDIM_From_U062			✔	✔	✔		✔

Line	Name	Condition	Condition	New	Upd	Del	Cond.Upd.	Cond.Upd.	Upd Fields	Upd Fields
0	TE_U062_UPD_Set_LinkToU053/U055	☑	WKP_ID_CEGEDIM <> "" AND ADR_ID_CEGEDIM <> ""	☑	☑					
1	TE_U053_UPD_Set_ADR_ID_CEGEDIM_From_U062			☑	☑	☑			☑	9,10,14

- **Line 0: Trigger "TE_U062_UPD_Set_LinkToU053/U055" (set links to parent infoareas)**

	Field	Function	Field Contents	Reference Fu	Variable	Direct Reference	Reference	With Conc
0	U053_StaNo		1					✔
1	U053_StaNo		2					✔
2	U053_StaNo		3					✔
3	U053_StaNo		4					✔
4	U053_StaNo		5					✔
5	U053_StaNo		6					✔
6	U053_StaNo		7					✔
24	U053_StaNo		25					✔
25	U053_StaNo		26					✔
26	U053_SerNo		s,[0-9]+,,,4	Regular Expre		WKP_ID_CEGEDI		
27	U055_StaNo		s,[0-9]{2}	Regular Expre		ADR_ID_CEGEDI		
28	U055_StaNo	Add	100					
29	U055_SerNo		s,[0-9]+,,,5	Regular Expre		ADR_ID_CEGEDI		

  Set U053_StaNo (lines 0 to 25)

  Set U053_SerNo (line 26)

  Line 27, 28, 29: Set U055_StaNo, U055_SerNo from ADR_ID_CEGEDIM by regular expression.

- **Line 1: Trigger "TE_U053_UPD_Set_ADR_ID_CEGEDIM_From_U062"**

  Set field "ADR_ID_CEGEDIM" in U053 from U062.

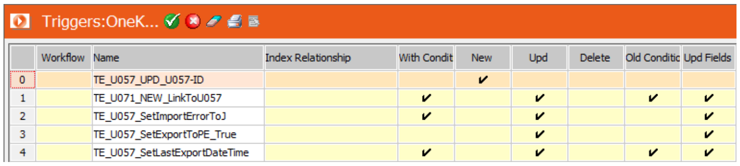
5. Dataflow INDIVIDUAL

- **Import from flat file to staging table**

The file “..._OK_DE_INDIVIDUAL_...flat” is imported by the format “TE_IMP_OneKey_U057_Individual” to staging infoarea U057.

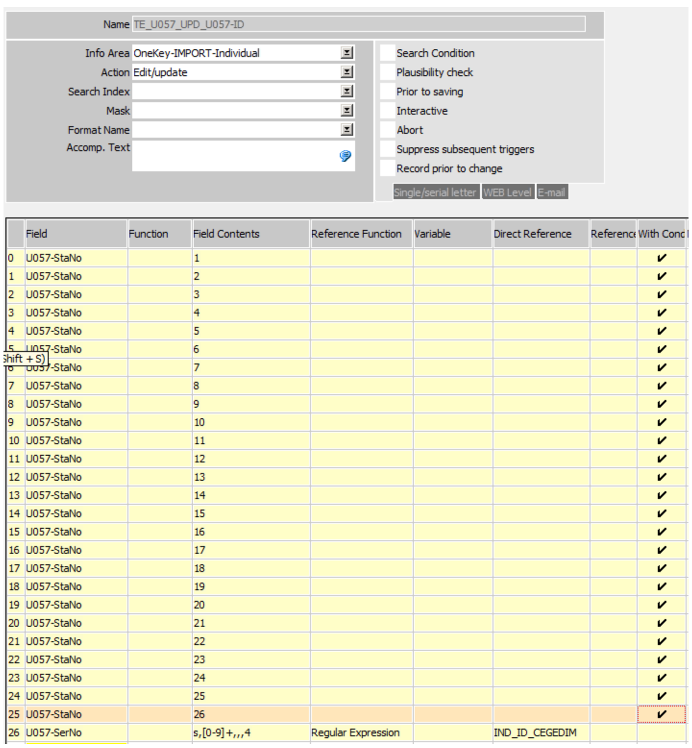
- **Trigger**

  The following triggers are defined for U057:



	Workflow	Name	Index Relationship	With Condit	New	Upd	Delete	Old Conditic	Upd Fields
0		TE_U057_UPD_U057-ID			✔				
1		TE_U071_NEW_LinkToU057		✔		✔		✔	✔
2		TE_U057_SetImportErrorToJ		✔		✔			✔
3		TE_U057_SetExportToPE_True				✔			✔
4		TE_U057_SetLastExportDateTime		✔		✔		✔	✔

- **Line 0: Trigger “TE_U057_UPD_U057-ID”**



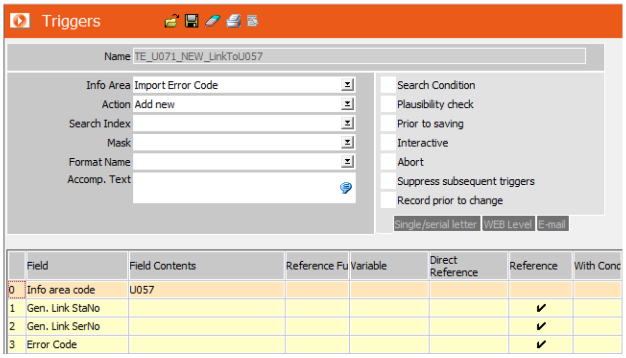
	Field	Function	Field Contents	Reference Function	Variable	Direct Reference	Referenc	With Cond
0	U057-StaNo		1					✔
1	U057-StaNo		2					✔
2	U057-StaNo		3					✔
3	U057-StaNo		4					✔
4	U057-StaNo		5					✔
5	U057-StaNo		6					✔
6	U057-StaNo		7					✔
7	U057-StaNo		8					✔
8	U057-StaNo		9					✔
9	U057-StaNo		10					✔
10	U057-StaNo		11					✔
11	U057-StaNo		12					✔
12	U057-StaNo		13					✔
13	U057-StaNo		14					✔
14	U057-StaNo		15					✔
15	U057-StaNo		16					✔
16	U057-StaNo		17					✔
17	U057-StaNo		18					✔
18	U057-StaNo		19					✔
19	U057-StaNo		20					✔
20	U057-StaNo		21					✔
21	U057-StaNo		22					✔
22	U057-StaNo		23					✔
23	U057-StaNo		24					✔
24	U057-StaNo		25					✔
25	U057-StaNo		26					✔
26	U057-SerNo		s,[0-9]+,,,4	Regular Expression		IND_ID_CEGEDIM		

  Set U057-StaNo (lines 0 to 25)

  Set U057-SerNo (line 26)

- **Line 1: Trigger “TE_U071_NEW_LinkToU057”**

  If field “Import error” is true, create a new U071-record and link it to the calling U057-record.



- **Line 2: Trigger “TE_U057_SetImportErrorToJ”**

  Set the text field “Import Error” to “J”, if an error during import occurred and field “error code” has been changed.

- **Line 3: Trigger “TE_U057_SetExportToPE_True”**

  Set field “Export to PE?” to “true” if any master data field of U057 has been changed.

- **Line 4: Trigger “TE_U057_SetLastExportDateTime”**

  Set field “Last Export Date” and “Last Export Time” if field “Export to PE?” has been reset to false.

6. Dataflow ACTIVITY

- **Import from flat file to staging table**

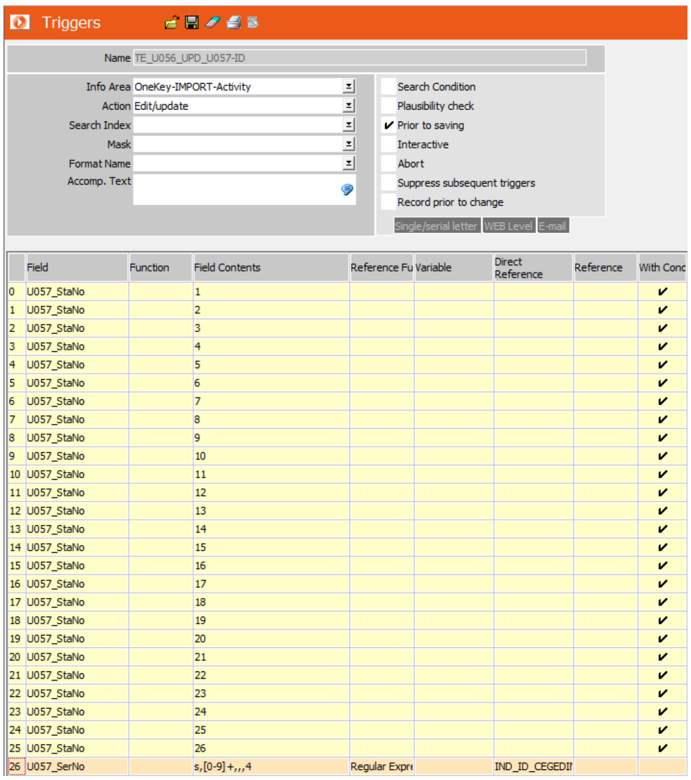
  The file "..._OK_DE_ACTIVITY_...flat" is imported by the format "TE_IMP_OneKey_U056_Activity" to staging infoarea U056.

- **Triggers**

  - **Line 0: Trigger "TE_U056_UPD_U057-ID"**

    Build the correct linked station, serial number out of the IND_ID_CEGEDIM.

    - Set U057_StaNo (lines 0 to 25)
    - Set U057-SerNo (line 26)



	Field	Function	Field Contents	Reference Fu	Variable	Direct Reference	Reference	With Cond
0	U057_StaNo		1					✔
1	U057_StaNo		2					✔
2	U057_StaNo		3					✔
3	U057_StaNo		4					✔
4	U057_StaNo		5					✔
5	U057_StaNo		6					✔
6	U057_StaNo		7					✔
7	U057_StaNo		8					✔
8	U057_StaNo		9					✔
9	U057_StaNo		10					✔
10	U057_StaNo		11					✔
11	U057_StaNo		12					✔
12	U057_StaNo		13					✔
13	U057_StaNo		14					✔
14	U057_StaNo		15					✔
15	U057_StaNo		16					✔
16	U057_StaNo		17					✔
17	U057_StaNo		18					✔
18	U057_StaNo		19					✔
19	U057_StaNo		20					✔
20	U057_StaNo		21					✔
21	U057_StaNo		22					✔
22	U057_StaNo		23					✔
23	U057_StaNo		24					✔
24	U057_StaNo		25					✔
25	U057_StaNo		26					✔
26	U057_SerNo		s,[0-9]+,,,4	Regular Expre		IND_ID_CEGEDII		

  - **Line 1: Trigger "TE_U071_NEW_LinkToU056"**

    Runs on "import error == J" and old condition "Import Error == <empty>".

    Creates a new import error record which is linked to a activity. Field "Error Code" is filled from Activity.ErrorCode.

  - **Line 2: Trigger "TE_U056_SetImportErrorToJ"**

    Sets field U056.ImportError to "J".

  - **Line 3: Trigger "TE_U056_SetExportToCP_True"**

    Sets fields U056.ExportToCP to "true".

  - **Line 4: Trigger "TE_U056_SetLastExportDateTime"**

    Sets fields U056 "Last Export Date" and "Last Export Time" with a timestamp.

9. Dataflow CODE

- **Import from flat file to staging table**

  The file “…_OK_DE_CODE_…flat” is imported by the format “TE_IMP_OneKey_U070_Code” to staging infoarea U070.

- **Trigger**

  The trigger "TE_U070_Call_blat.exe“ generates an email for the admin and inform him about changed or new catalog values from Cegedim.

  Tip: It is necessary to configure this trigger to your admin’s email address! The trigger is not in the station right.

10. Dataflow RELATION

Import from flat file to staging table

The file “…_OK_DE_IAE_RELATION_…flat” is imported by the format “TE_IMP_OneKey_U072_Relation” to staging infoarea U072.

Inbound Process TRANSFER

Learn about the transfer process for the inbound process.

Can be called with parameter “OneKey.exe TRANSFER”. The Function “U8Import_DB” imports from staging table to update tables.

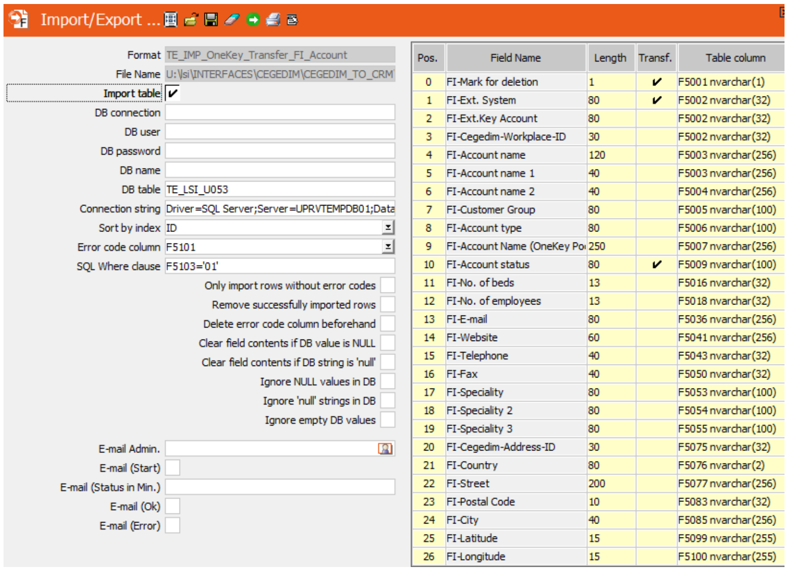
11. WORKPLACE (U053) Accounts (FI)

- **Import from Staging to FI**

  The script is calling function TransferStagingArea_2_CRM() and is executing the import format “TE_IMP_OneKey_Transfer_FI_Account” which transfers data from staging to the FI-table. The mapping of fields is defined here. Several transformations for field values are handled in this import format.

  Error code column is field U053.5101 “error code”. (Column in the database to which error codes are written.)

  Tip: Please customize the importformat in your project. This is seen as an example. Not all field-mappings are covered by this importformat.



- **Trigger on FI**

  The trigger “TE_OneKey_FI_UPD_SetPoolClearingStateForValidation” is running on NEW and UPD (of master data fields) of FI and sets the field “Pool clearing State” to “For Validation”. Condition is handled by variable “TE_Clearing.AccountIncludeTypes” which has a condition on field “Account type” (currently all LSI-template values with tenant 9004).

- **Info: Export of Workplace Validation Requests**

  The script is calling function REQUEST()...

  WORKPLACE VALIDATION REQUEST:

  Export from FI (where Pool Clearing state == zu clearen)

  EXP_Format_FI_ACCOUNTS_FOR_VALIDATION

  Re-Import to C026

  IMP_Format_STAGINGAREA_ACCOUNTS_FOR_VALIDATION

  Export of C026 OneKey

  EXP_Format_STAGINGAREA_ACCOUNTS_FOR_VALIDATION

  Re-Import to C026 (set Pool Clearing state = sent to clearing)

  IMP_Format_STAGINGAREA_ACCOUNTS_STATE_VALIDATION_REQUEST

- **Info: Import of Opening Hours (CT)**

  Import format “TE_IMP_OneKey_CT_OpeningHours_Monday” is used to import workplace opening hours to table “CT”.

12. INDIVIDUAL (U057) Person (PE)

- **Import from Staging to PE**

The script is calling function TransferStagingArea_2_CRM() and is executing the import format “TE_IMP_OneKey_Transfer_PE_Person” which transfers data from staging to the PE-table. The mapping of fields is defined here. Several transformations for field values are handled in this import format.

Error code column is field U057.5077 “error code”. (Column in the database to which error codes are written.)

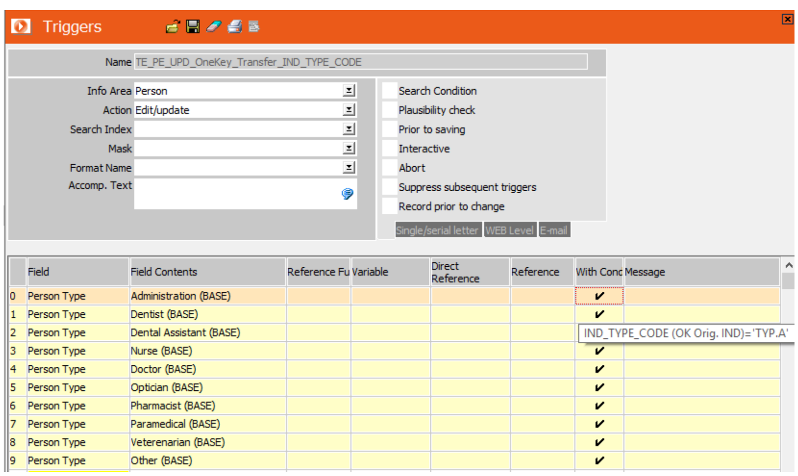
Tip: Please customize the importformat in your project. This is seen as an example. Not all field-mappings are covered by this importformat.

- **Triggers on PE**

  The trigger “TE_OneKey_PE_UPD_SetPoolClearingStateForValidation” is running on NEW and UPD (of master data fields) of PE and sets the field “Pool clearing State” to “For Validation”.

Tip: The original OneKey Catalog values is imported into shadow fields – having the postfix “(OK Orig. IND)”. So the original value persists in my CRM-record. That is sensible for sending requests to onekey and guarantees that we are sending correct data.

The value is no longer transformed in the importformat. We are using triggers to map the onekey-value to our crm-values. This is an advantage for the customizer and offers more possibilities.



The OneKey catalog values are already delivered by the template. They have no tenant which makes import and match-up easier. The external key is identical to the CATALOG_BASE_LANGUAGE. So we can guarantee the correct value on sending requests to OneKey. The readable value is imported to column description.

- **Info: Export of Person Validation Requests**

  The script.au3 is calling function REQUEST()...

  PERSON VALIDATION REQUEST:

  Export from KP (where Pool Clearing state == zu clearen)

EXP_Format_KP_PERSONS_FOR_VALIDATION

Re-Import to C027

IMP_Format_STAGINGAREA_PERSONS_FOR_VALIDATION

Export of C027   OneKey

EXP_Format_STAGINGAREA_ACCOUNTS_FOR_VALIDATION

Re-Import to C027 (set Pool Clearing state = sent to clearing)

IMP_Format_STAGINGAREA_PERSONS_STATE_VALIDATION_REQUEST

13. ACTIVITY (U056)   Role (CP)

- **Import from Staging to CP**

  The script is calling function TransferStagingArea_2_CRM() and is executing the import format “TE_IMP_OneKey_Transfer_CP_Role” which transfers data from staging to the CP-table. The mapping of fields is defined here. Several transformations for field values are handled in this import format.

  Error code column is field U056.5134 “error code”. (Column in the database to which error codes are written.)

  Tip: Please customize the importformat in your project. This is seen as an example. Not all field-mappings are covered by this importformat.

- **Trigger on CP**

  The trigger “TE_OneKey_CP_UPD_SetPoolClearingStateForValidation” is running on NEW and UPD (of master data fields) of CP and sets the field “Pool clearing State” to “For Validation”.

- **Info: Import of Visit Times (CT)**

  Import format “TE_IMP_OneKey_CT_VisitTimes_Monday” is used to import visit times (for Monday) to table “CT”.

14.A. RELATION (U072) WORKPLACE   Relation (PB)

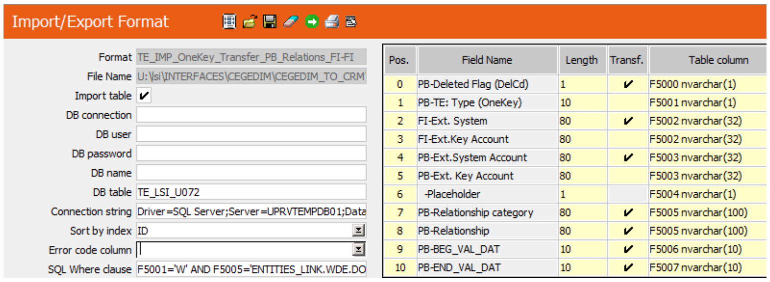
Import from Staging to PB

The script is calling function TransferStagingArea_2_CRM() and is executing the import format “TE_IMP_OneKey_Transfer_PB_Relations_FI-FI” which transfers data from staging to the PB-table. The mapping of fields is defined here. Several transformations for field values are handled in this import format.

Match and Update via external key account. Conditions for import are not active!

Tip: Please customize the importformat in your project. This is seen as an example. Not all field-mappings are covered by this importformat.

Tip: We are importing no duplicates! (F5001='W' AND F5005!='ENTITIES_LINK.WDE.DOU')



Pos.	Field Name	Length	Transf.	Table column
0	PB-Deleted Flag (DelCd)	1	✔	F5000 nvarchar(1)
1	PB-TE: Type (OneKey)	10		F5001 nvarchar(1)
2	FI-Ext. System	80	✔	F5002 nvarchar(32)
3	FI-Ext.Key Account	80		F5002 nvarchar(32)
4	PB-Ext.System Account	80	✔	F5003 nvarchar(32)
5	PB-Ext. Key Account	80		F5003 nvarchar(32)
6	-Placeholder	1		F5004 nvarchar(1)
7	PB-Relationship category	80	✔	F5005 nvarchar(100)
8	PB-Relationship	80	✔	F5005 nvarchar(100)
9	PB-BEG_VAL_DAT	10	✔	F5006 nvarchar(10)
10	PB-END_VAL_DAT	10	✔	F5007 nvarchar(10)

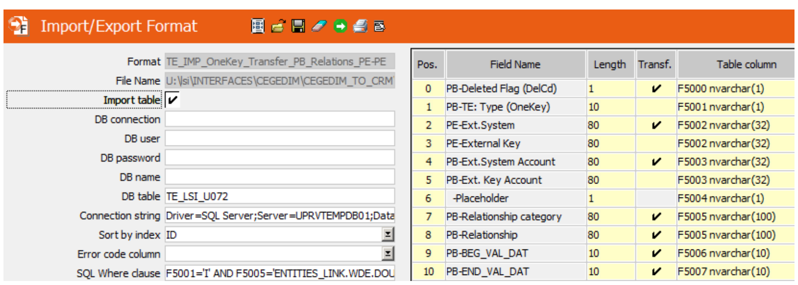
14.B: RELATION (U072) INDIVIDUAL   Relation (PB)

Import from Staging to PB

The script is calling function TransferStagingArea_2_CRM() and is executing the import format “TE_IMP_OneKey_Transfer_PB_Relations_PE-PE”which transfers data from staging to the PB-table. The mapping of fields is defined here. Several transformations for field values are handled in this import format.

Match and Update via external key person. Conditions for import are not active!

Tip: We are importing no duplicates! (F5001='I' AND F5005!='ENTITIES_LINK.WDE.DOU')



Pos.	Field Name	Length	Transf.	Table column
0	PB-Deleted Flag (DelCd)	1	✔	F5000 nvarchar(1)
1	PB-TE: Type (OneKey)	10		F5001 nvarchar(1)
2	PE-Ext.System	80	✔	F5002 nvarchar(32)
3	PE-External Key	80		F5002 nvarchar(32)
4	PB-Ext.System Account	80	✔	F5003 nvarchar(32)
5	PB-Ext. Key Account	80		F5003 nvarchar(32)
6	-Placeholder	1		F5004 nvarchar(1)
7	PB-Relationship category	80	✔	F5005 nvarchar(100)
8	PB-Relationship	80	✔	F5005 nvarchar(100)
9	PB-BEG_VAL_DAT	10	✔	F5006 nvarchar(10)
10	PB-END_VAL_DAT	10	✔	F5007 nvarchar(10)

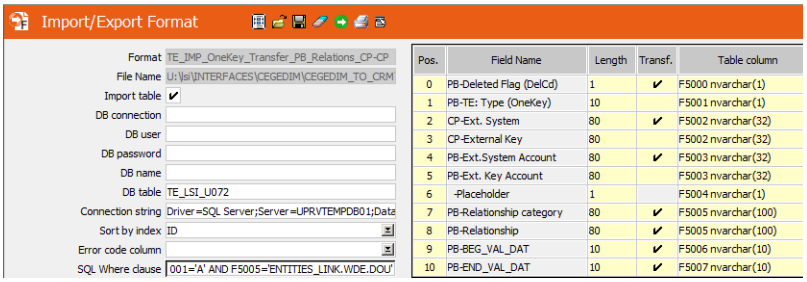
14.C: RELATION (U072) ACTIVITY   RELATION (PB)

Import from Staging to PB

The script is calling function TransferStagingArea_2_CRM() and is executing the import format “TE_IMP_OneKey_Transfer_PB_Relations_CP-CP”which transfers data from staging to the PB-table. The mapping of fields is defined here. Several transformations for field values are handled in this import format.

Match and Update via external key account and external key person. Conditions for import are not active!

Tip: We are importing no duplicates! (F5001='A' AND F5005!='ENTITIES_LINK.WDE.DOU')

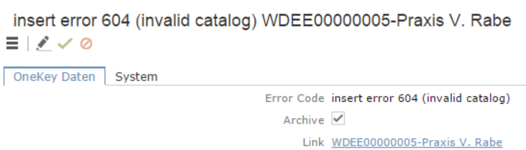


15: DUPLICATE U058

16 – 19: Import Error Handling Workplace

The infoareas U071 has a generic link, which is used for U053, U057 or U056.

The field “error code” holds the information coming from the import module.



The import table WKP, IND, ACT is imported to FI, PE, CP by database import from table (Process Transfer).

If a new import table record has been created, it gets the status “new/initial”.

If the import/transfer was successful the field “status” is set to “transferred”.

If any data field has changed (due to updates from onekey), the “status” is set to “to transfer”, which means there are pending updates.

If an error occurs, the import module sets the field “Error Code” in the source table. This field is set in SQL and therefore we can’t fire triggers on that event.

Therefore we have the following steps in `Func TransferStagingArea_2_CRM`

1. Export WKP with condition “ErrorCode = empty AND Status <> transferred/error”
2. Import the “successful” WKPs and set the status “transferred”
3. Export WKP with condition “ErrorCode <> empty”
4. Import the “failed” WKPs and set the status “error” and set the field “Import Error” to “J”.

If the field “Import Error” is set to “J” the trigger “TE_U071_NEW_LinkToU053” creates a new Import Error record.

: Error Handling datamodel has been implemented for U053, U057 and U056. The following steps are only available for Workplace (U053)!

Please define step 16, 17, 18, 19 in the same way for U056 and U057 if you need it in projects.

Tip: A more elegant way of setting the status field could be done via database views on the “error code” field.

Button “Transfer Again”

The button 'TE_U071_TransferAgain' is calling trigger ‘TE_U071_UPD_SetParentStatus_ToTransfer’ which sets a dummy field in U071. A trigger runs this field’s change and set the status in the parent linked record to “to transfer”. In the next nightly run, this record is transported/imported to FI again.

Outbound Process REQUEST

Learn about the out bound request and upload process.

Can be called with parameter “OneKey.exe REQUEST”.

Export of Workplace Validation Requests

The script.au3 is calling function REQUEST()...

WORKPLACE VALIDATION REQUEST:

Export from FI (where Pool Clearing state == zu clearen)

EXP_Format_FI_ACCOUNTS_FOR_VALIDATION

Re-Import to C026

IMP_Format_STAGINGAREA_ACCOUNTS_FOR_VALIDATION

Export of C026 OneKey

EXP_Format_STAGINGAREA_ACCOUNTS_FOR_VALIDATION

Re-Import to C026 (set Pool Clearing state = sent to clearing)

IMP_Format_STAGINGAREA_ACCOUNTS_STATE_VALIDATION_REQUEST