



Academic Adoptions Setup

Iptor IP1

Release 7.9

1. Setup

The following business rules have to be setup for SOP for Academic Database and CRM Integration Setup. This document does not cover customised setup tasks of specific companies. The purpose of this document is to assist IBS consultants setup appropriate business rules at a customer site for the specified process.

Note: Deviations from this setup should be covered by setup tasks written by individual companies.

1. Setup Java agent and ensure its running for Excel Import/Export. Java Agent is usually installed with the XT installation.
2. Setup the manual template for Adoptions (Work with CRM Manual Template – CRW030)
3. Check/ensure all CRM Functions, Options and Variables are setup.

New CRM functions in Release 7.6:

CRM Functions	Description
ACAD	Academic

New CRM options in Release 7.6:

CRM Options	Description	Task
AA	Customer Curriculum	Add option 'AA' to function group CUST.
AB	Customer Curriculum Detail	Add option 'AB' to function group ACAD
I7	Work with Opportunity	Add option 'I7' to function group CUST
CG	Contact Interest Maintenance	Add option 'CG' to function group CONT

New CRM variables in Release 7.6:

CRM Variables	Description
DOOPPPRD	Opportunity period

DOSTS	Opportunity status
DOPROSUC	Prob of success
DOFPERD	Close period
TBORDQ	Order qty

Control Files	Description	Task
TMSTY/IC-INL1	Interest Level One	Set up the five hierarchy levels (TMSTY/IC-INL1 – TMSTY/IN-INL5) to the interest code to improve categorising and searching of interests. These are customer specific and used in the interest alpha search. The interest codes that are available to the contact/customer link will be based on the curriculum/interest code that is applied to the customer. If curriculum is not set against the customer, there is no check against the interests that are applicable against the contact. When applying interest codes, the 'Show all' option allows for all the available interest codes to be available and to be set against the contact.
TMSTY/IC-INL2	Interest Level Two	
TMSTY/IC-INL3	Interest Level Three	
TMSTY/IC-INL4	Interest Level Four	
TMSTY/IC-INL5	Interest Level Five	
TMSDS/CM-CL1	Customer Level One	Set up the five customer levels to identify institutions once the customer is maintained. These levels are added to the filter to select the relevant institution. The Work with Customer filter has been enhanced to include these 5 levels so that selection of the Institutions can be handled. These levels would also be utilised in filtering the customers for the campaign selection option.
TMSDS/CM-CL2	Customer Level Two	
TMSDS/CM-CL3	Customer Level Three	
TMSDS/CM-CL4	Customer Level Four	
TMSDS/CM-CL5	Customer Level Five	
TMSTY/ IC-LINK	Interest code link	Specify the contact attribute/control file where the interest codes are stored for contacts and item. Note: When the interest codes are added to the option TYM010 Interest Code Entry/Maintenance, the

		interest code is automatically added to the item control file.
TMSDS/IC-CRSE	Interest Codes	This is the item classification control file that holds the interest codes for the item as per TMSTY/IC-LINK setup.
TMSTY/SEM-SMCD	Semester Code	<p>This control file defines valid list of Semester Codes that can be used for Curriculum.</p> <p>E.g. Australian University semester, Singapore Secondary Colleges, etc.</p> <p>For each code,</p> <ul style="list-style-type: none"> • Determines if the period or month is used for the generation of the current semester and the next semester. • Stores current period. Used as default position when viewing or maintaining enrolment data. Can scroll Fwd/Back through periods. • Determines if enrolment data should roll into next period as a default value.
TMSTY/SEM-SSMT	Semester Start Month	<p>For each Semester Code (SEM-SMCD), this table defines list of start months for each semester. An effective year can be given if start months will be different from that year onward!</p> <p>E.g. Australian Secondary College semesters might typically start February (02), April (05), July (07), Sep (09).</p> <p>This table is used when scrolling Fwd/Back through periods to look at enrolment data for a school curriculum/subject. E.g. If current period is 05 on SEM-SMCD, then 201105 data would be shown by default. Scrolling Fwd with example given here, would then go to 201107, then 201109, then 201202, etc.</p>
TMSDM/CPGN-LTY	Campaign List Type	Define the List types to be used for the Campaign Lists. The List type determines which template is to be used in creating the incident.
TMSDM/CPGN-XLF	Excel functions	TMSDM/CPGN-XLF refers to Excel Functions program used for download and upload process.
TMSDM/CPGN-XLS	Excel settings	The specific details of the template setup are to be defined in this Control File
TMSCRM/MRK-LIST	Issue creation from Campaign list-template	The template to be used in creating the incident has to be set up in this control file for each of the campaign list type. When incidents are created from

		the Campaign lists, the list type determines which template is to be used as per this control file.
TMSCRM/FX-OPT	Function key by Incident level	This Control File has to be configured to specify the function keys to be used for the specified incident levels and the program that is to be executed.
TMSCRM/SM-DFT	Default for sample order	Set up the defaults for the sample reservation order from CRM Opportunity.
TMSDM/CPGN-LST	Campaign lists used?	This control file should be set to 'Y' for Campaign lists used so the list code can be used in Our Reference along with the campaign code. The sales will then be recorded by list as well as campaign.
TMSCRM/CC-A	Contact Classification	Ensure contact classification groups are set up correctly with appropriate validation flags. New validation type '3' now validates against a program. Control files/programs must be specified if validation is against a control file or a program.
TMSCRM/ISS-STSI	Opportunity item status	This control file stores the status of the opportunity item.
TMSCRM/PHNL-C	Phone device for contacts	Specify the device for contacts to display on the Work with Contact screen. E.g. PHN, FAX, MOB
TMSCRM/ISS-TEXT	Incident Text type	Add new text type 'OPA' for Work with Opportunity Item.
TMSDS/CM-LCTYP	Linked Account Type	This control file is to define the link type. The bookshops are type 'B'.
TMSDM/DME081	Mailing List Selection Fields	Add the 5 customer levels (TMSDS/CM-CL1 to TMSDS/CM-CL5) to use as selection fields for mailing lists.
TMSTY/CI-AL*	Competition Item Search Setup	CI-ALFGP Competition Item Search field groups CI-ALFLD Competition Item Search fields CI-ALSET Competition Item Alpha search set CI-ALSRI Competition Item Search sort IDs CI-ALSRT Competition Item Search sort fields
TMSTY/CI-PUB	Competition Item Publisher	Set up competition publishers.
TMSTY/CI-STS	Competition Item Status	Set up competition item status.

Set up CRM incident template for academic adoption opportunities as per TMSDM/CPGN-LTY. Do this via Work with CRM Manual Template (CRW030).