IP1 CRM Setup & Maintenance

Iptor IP1

Release 12.0

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Control files setup

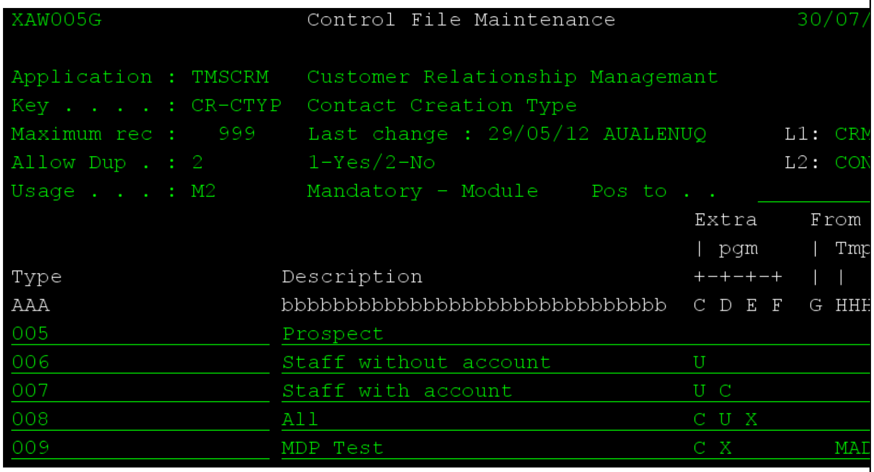
The following business rules must be setup to handle the CRM process. These rules are mandatory and include system defined rules as well as the mandatory CRM module rules.

Note: It is critical to understand the setting of control files and how it works. Control files must be setup correctly for the system to operate as intended. Any changes to the control files setup should be addressed cautiously and in consultation with Iptor IP1 consultants.

Control files - Contacts

<table>
<tr><th>Control file</th><th>Description</th></tr>
<tr><td>TMSCRM/CR-CTYP

Contact Creation Type</td><td>Users are defined into categories which are definable in this control file. This mandatory control file holds the types of users which can exist in the system and what type of information must be completed when adding one of these users.

Used on initial contact creation (CRO055) and must be setup so appropriate programs are called to capture the required contact information.


Columns ‘Extra Program’ must be setup with:

U – to invoke program to enter resources for your company, these can be resources with iSeries ID or with no iSeries ID also known as external resources.

X – to invoke program to enter web user details including User ID and access type.

C - to invoke program to add customer for the contact</td></tr>
<tr><td>TMSCRM/US-TYPE

User type</td><td>Mandatory control file for CRM; holds internal and external user type code. A user should be flagged as an internal user to enable capture of iSeries ID.</td></tr>
<tr><td>TMSCRM/US-STS

User status</td><td>System defined user status: Active, Closed, In-progress, Stopped</td></tr>
</table>

TMSCRM/CR-CTYPA Contact Type User Access	Setup any contact type restriction that would apply for a user.
TMSCRM/CC-A Contact classifications	Mandatory control file for CRM; the contact attributes applicable for a contact is setup in this control file. Whether these attributes display for a contact can be dependent on the contact type setup in TMSCRM/CR-CTYP, e.g. Attribute UserGroup will only display if the contact type in TMSCRM/CR-CTYP is setup as an internal user (Extra program column = ’U’). .
TMSCRM/CC-A0020	Mandatory control file for CRM; holds the fields for contact classifications used by the system.
TMSCRM/CC-USRGP	All users are attached to a User Group defined in this control file (mandatory). This group is then assigned a definition which allows it to see specific information in the system. Setup the user groups. This eliminates the need to set up individual user access as users can simply be added to a user group when they are entered into the contact system. The options that a user group can access must be setup using Work with CRM User options.
TMSCRM/UA-ACC	Holds user group access by incidents levels, contact type and value.
TMSCRM/UA-ACT	User access security level can be activated/deactivated. If activated

Control files- Calendar setup

Control file	Description
TMSCRM/CAL-A	Mandatory calendar type and working week setup.
TMSCRM/CAL-B	Mandatory calendar type by company/warehouse.

Control files- Template setup

Control file	Description
TMSCRM/TMP-OVR	System defined control file to display/lock/override template values.
TMSCRM/TMP-TYP	System control file holds the template types.
TMSCRM/TMP-VAR	System defined control file – holds all the variables that can be used on a template.
TMSCRM/TMP-VARL	Holds the location of the template variables based on the source category of the template (TMSCRM/ISS-SRCE).

Control files - Address setup

Control file	Description
TMSCRM/ AD-ALFGP	Holds contact search field groups and the data type applicable for each group.
TMSCRM/AD-ALFLD	Mandatory system control files; must be setup for CRM address maintenance. Contains the address validation search fields. This control file refers to Address field ID's and the search methods for each.
TMSCRM/ AD-ALSRI	Determines the address validation search sort sequence by ID's.
TMSCRM/ AD-ALSRT	Holds address
TMSCRM/ADFT0	System defined address format type i.e. Street, PO Box etc.
TMSCRM/ADFT1	Groups countries with the same address format into format groups.
TMSCRM/ADFT2	Define the address formats as they would appear in reports. It also provides an option to trim off spaces on the address.
TMSCRM/ADFT3	Contain the descriptions for address lines 1-5, used for reporting purposes by format group.
TMSCRM/ADTYP	Contact address types and the corresponding format type (TMSCRM/ADFT0)
TMSCRM/ADSTS	System defined address status.
TMSCRM/AV-ALFLD	Holds address validation search fields by country.
TMSCRM/AV-ALSRI	Address Validation Search sort IDs.
TMSCRM/AV-ALSRT	Address Validation Search sort fields.
TMSCRM/AV-CNTRY	Holds address country codes.
TMSCRM/AV-DFN	Holds address validation by country group format and type and external programs for address validation if applicable.
TMSCRM/AV-DFN1	Holds the length of the key address line field for validation and search.
TMSCRM/AV-DFN2	Holds programs that will bypass address validation (optional).
TMSCRM/AV-DFN3	Holds programs that will issue hard error when it fails address validation (optional).
TMSCRM/AV-IDTYP	Entity type for different contact types in IP1.

Control files- CRM incidents

Control file	Description
TMSCRM/ISS-LMAP	Holds valid incident level mappings to be sued for incidents.

TMSCRM/ISS-LVL1-TMSCRM/ISS-LVL5	Classification levels of the CRM incidents; these classification levels in an incident determine what activities and routes are assigned to an incident (this is setup in **CRW035 -Work with Activity Rules**).
TMSCRM/ISS-SRCE	System defined sources used by CRM templates to distinguish the source of the different types of transactions.
TMSCRM/RULE-SSQ	Holds the rules for the incident fields at particular status; whether the fields can be reset or it's locked once its setup, mandatory or optional.
TMSCRM/ISS-USER	Holds internal resources (with iSeries user ID) who can delete a CRM incident.
TMSCRM/ISS-STS	Holds all the valid status codes for Incident detail.
TMSCRM/ISS-STSG	System control file: groups the statuses from incident detail status TMSCRM/ISS-STS based on the close flag.
TMSCRM/ISS-STSH	Holds incident header statuses.
TMSCRM/ISS-TYPE	System control file: holds incident type and its default status.
TMSCRM/ISS-KEY	Holds system defined keys for incident subjects for CRM templates. Up to 5 of these keys can be preset for subjects in the template.
TMSCRM/ISS-TEXT	Holds system defined text type for different incident types and specifies maximum number of lines allowed for each.
TMSCRM/CRO495A	System defined CRM activity functions and programs.
TMSCRM/FX-CL	Holds default values for claim entry by incident levels and function key.
TMSCRM/FX-OE	Holds default values for order entry by incident levels and function key.
TMSCRM/FX-OPT	Holds system defined Function key that is to be used for the specified incident levels. Allows different incident levels to have specific functions to call specific programs.

Control files- CRM Notifications

Control file	Description
********/NT-FUNC	Holds system defined notification functions (CRM incident, CRM activity).
TMSCRM/NT-VAR	Holds the variables that can be used for notifications for outstanding incidents or CRM activity tasks.

Control files- CRM incident reports and CRM incident export

Control file	Description
CRR010	Holds the column headings and lengths for CRM incident report CRR010.
CRO220-A	Holds the sort sequence fields for CRM incident export.
CRO220-B	Holds existing programs that are used for some template types when running the incident excel export.
CRO220-0	Holds the header name for incident excel export.
CRO220-1	Holds the layout types that will be used to define the layout for the incident excel export.
CRO220-3	Holds the layout fields, row and column details by layout type for the incident excel export.

Control files- CRM dashboard

Control file	Description
TMSCRM/ISS-VW01	Used by CRM dashboard; defines the CRM view by User Group.
TMSCRM/ISS-VW02	Used by the CRM Dashboard to set the time period for the outstanding incidents.

Control files- CRM letter generation

Control file	Description
TMSCRM/TMP-VARL	Holds the location of the template variables based on the source category of the template (TMSCRM/ISS-SRCE).
TMSAR/LTR-VAR1	Holds the variables that can be used in the auto generated CRM word document for overdue CRM letters.
********/LNG	System defined control file holds the language codes. Used by Letter template to determine the language to be used in the letter.

Control files- Contact duplicate detection

Control file	Description
TMSCRM/NA-MTKH	Holds match key codes to build up the match keys to detect duplicates e.g. A01 = email address, B01 = Name and address.
TMSCRM/NA-MTKY	Fields for the match key code above, that will be used for duplicate detection.

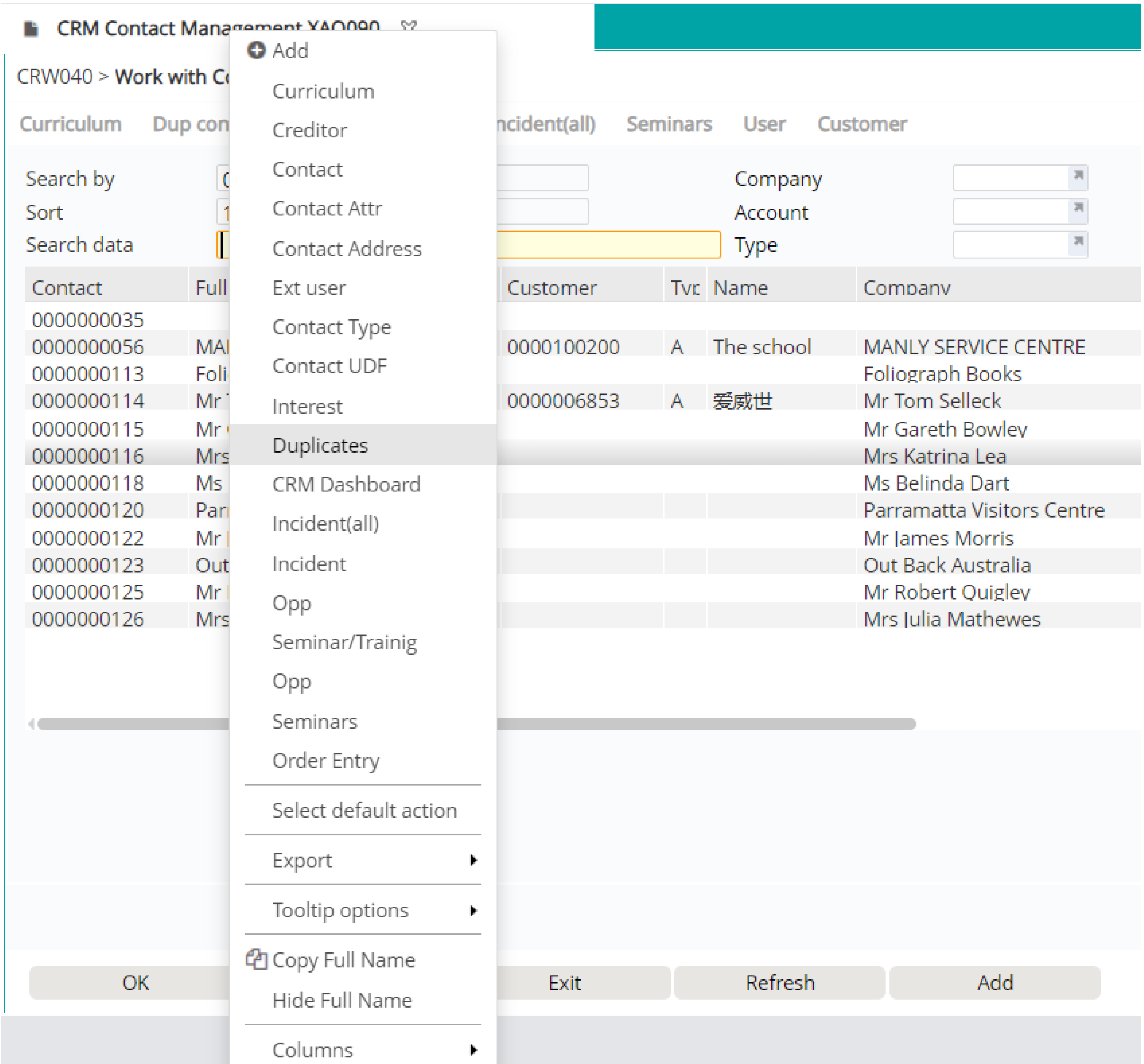
Other CRM setup

CRM options

CRM options are all the options that are made available as *Tabs or Selections* on a panel. In XT:

- *Tabs* are displayed at the top of the screen. They allow you to change to a different program without necessarily having a specific record selected.
- Right click on a subfile list entry would display a dropdown list of *Selections*.

Tabs and *Selections* are displayed in the XT panel below:

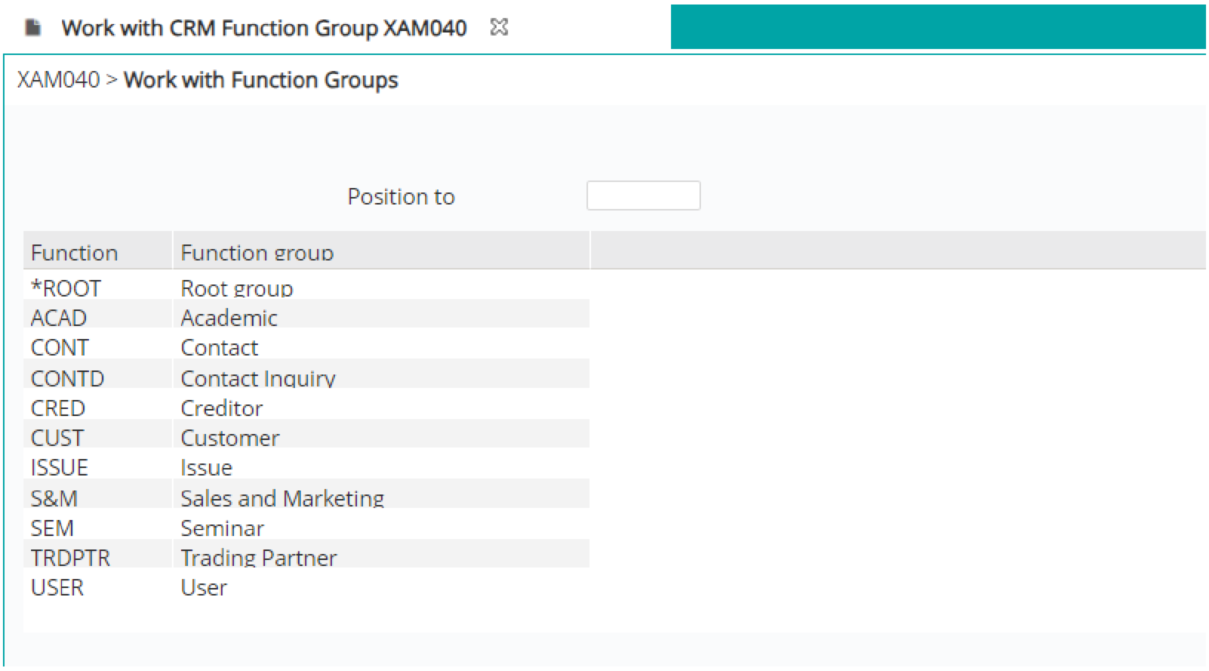


CRM options must be assigned to a User group so it’s available to all the users in that group.

Setup	Steps
Link CRM options to User groups	***Work with CRM User Options*** allows users belonging to a User group to have access to the CRM options linked to the User group. The user is linked to the User group via Contact Attributes. 1. Check/update User group options to ensure required options are available to assigned User groups: Menu: Publishing Modules > CRM > CRM Program Registration > Work with CRM User Options. 1. Select the User group and click option **Work with**. 2. Click **Add** and enter the CRM option from the select list and click **OK**.

Function groups

Function groups are simply used to tie different CRM options (programs) together into groups, thus determining what tabs/selections are available to you from each CRM option (assuming your user profile has access to them also).


Work with CRM Function Group XAM040

XAM040 > Work with Function Groups

Position to

Function	Function group
*ROOT	Root group
ACAD	Academic
CONT	Contact
CONTD	Contact Inquiry
CRED	Creditor
CUST	Customer
ISSUE	Issue
S&M	Sales and Marketing
SEM	Seminar
TRDPTR	Trading Partner
USER	User

CRM options must also be assigned to Function groups to make it available.

Setup	Steps

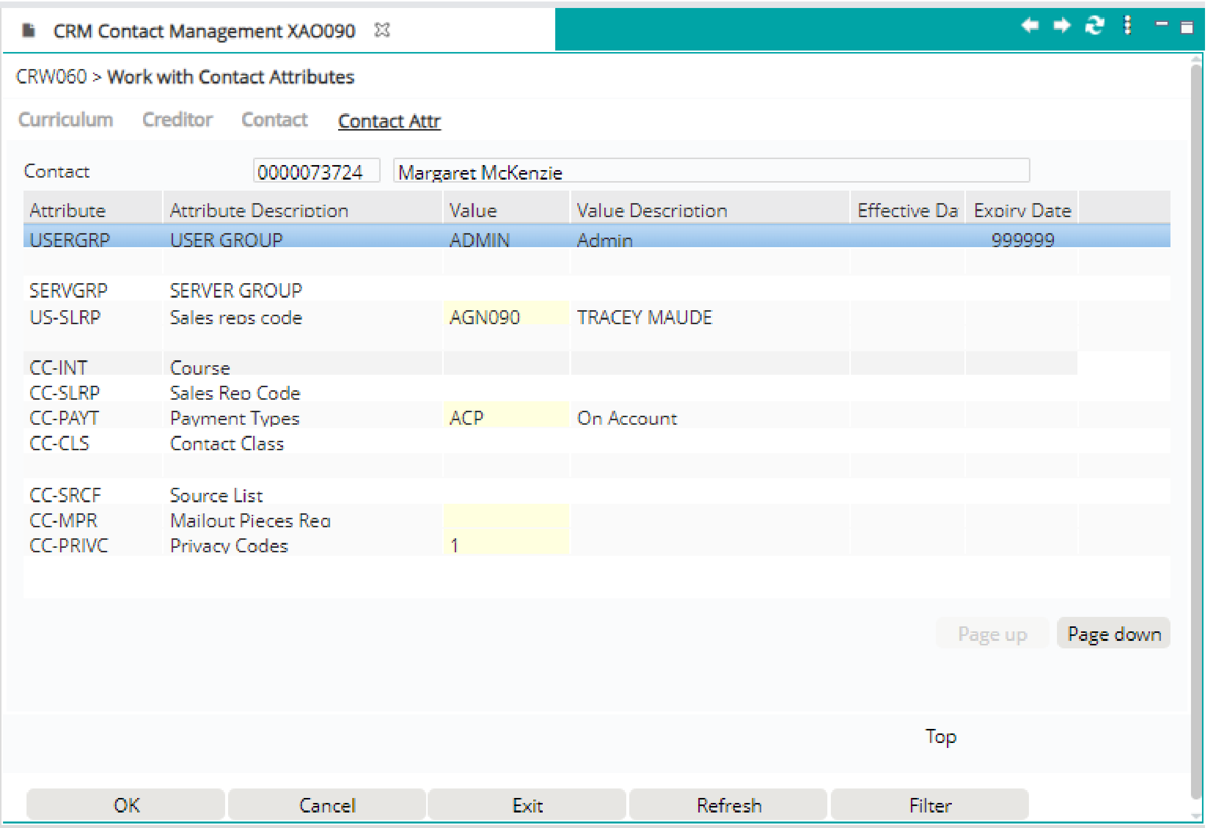
Assign CRM options to Function groups	***Function groups*** determine what tabs/selections are available to you from each CRM program. 1. Check/update *Function groups* to ensure required options are available to the *Function groups*. Menu: Publishing Modules > CRM > CRM Program Registration > Work with CRM Function Group. 2. Select the Function group and click option **Work with**. 3. Click **Add** and enter the CRM option from the select list and click **OK**. **Note**: If a CRM Option that is setup for a Function Group is not available then check that the user is assigned to the correct User group, and ensure the CRM Option is linked to that User group. **Note**: *ROOT function is invoked at the top menu level (initial menu) before the object is identified. When a selection is made (next level) and the object is identified then the function for the identified object is used.

User groups

The CRM options that is available to a program is determined by:

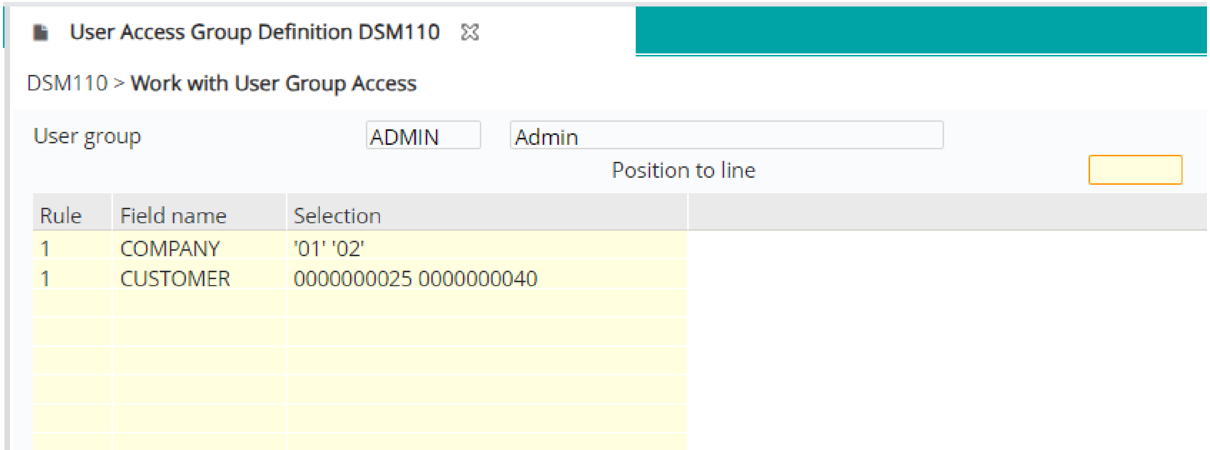
- User Group security
- Which CRM options are linked to the same function group?

User is linked to a User Group in its CRM attributes. User Groups are defined in control file TMSCRM/CC-USRGP.



User Groups can be tied to User Group Access definition with restrictions as well (DSM110).

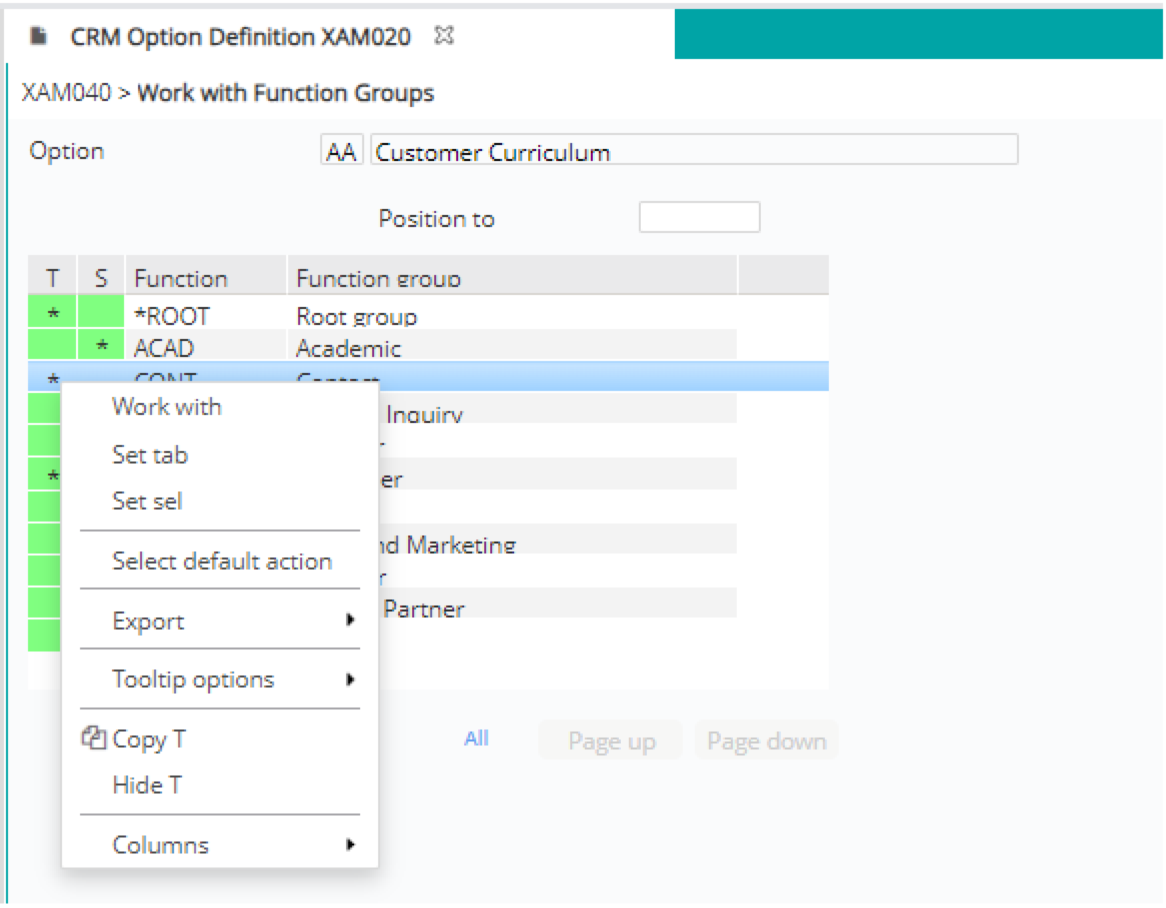
Base modules > Distribution > Mastefiles > Database Management > Company User > User Access > User Access Group Definition. Use option Rules to set/view restrictions.



Setup Function groups to appear as Tab or Selection list

Setup	Steps

Setup Function group to appear as a Tab or Selection list	A Function group can appear as a Tab or as a Selection list in a program. To appear as a Tab:
	
	1. Menu: Publishing Modules > CRM > CRM Program Registration > CRM Option Definition.
	2. Select CRM option and click option ***FuncGrp***.
	3. For the selected CRM option to display as a Tab:
	    a. select the Function group and click option ***Set tab***.
	4. For the selected CRM option to display as a Selection:
	    a. select the Function group and click option ***Set sel***.
	
	<u>Note</u>: To have all the CRM options within a Function group to display as a Selection, select the initiating option for that Function group and click option ***Set sel***.
	
	Similarly, to have all the CRM options within a Function group to display as a Tab, select the initiating option for that Function group and click option ***Set tab***.



CRM notifications setup

Setup	Steps
Setup notifications	1. Menu: Publishing Modules> CRM > CRM Maintenance > CRM Templates > Work with Notification. Existing notifications are displayed. 2. To setup a new notification, click function *Add*. 3. Enter a 10-character notification ID and a description. 4. Select the function as an incident if the notification is for outstanding incident or as an activity if the notification is to be linked to an activity task. The functions are defined in ********/NT-FUNC with pre-defined variables (TMSCRM/NT-VAR) that can be used for the notification. 5. You can select to send the notification before or after the specified number of days and the frequency of the notification. 6. Enter the subject and the text; select and use the variables specified on control file nominated on ********/NT-FUNC. Once a notification is defined, it can be setup either against an activity task or assigned to the applicable template for use on incidents.
Setup notification for an activity task	See Activity setup on this document on how to setup a notification for an activity task.

CRM templates

Templates are used to store common layout of forms using variables that can be automatically filled. CRM templates can be applied to an incident, CRM letter or used as filter. System defined control File TMSCRM/TMP-OVR makes it easier for users to accurately record templates. Settings in TMSCRM/TMP-OVR allows you to de-activate fields, default values from parameters or the template, which can be overridden or locked.

System defined variables that can be used for the templates are defined in control file TMSCRM/TMP-VAR.

The nature of the incident determines what information is required to log an incident. Subjects (user defined on control file TMSCRM/ISS-KEY) can be entered on the templates to specify what values are to be captured for an incident. For example if you want to create an incident on a purchase order, you can specify creditor number and the purchase order number as subjects that would be prompted on the incident. Subjects can be preset on a template if required. Subjects that are not pre-set on the templates can be entered directly on the incident to hold additional information.

Setup	Steps

Create a manual template for an incident	Manual templates are used when a user is manually enters an incident or an email.
	
	1. Menu: Publishing Modules > CRM > CRM Maintenance > CRM Templates > Work with CRM Manual Template.
	2. Click Add.
	3. Enter the Template ID and a Description and click OK. The Detail screen is displayed.
	4. For each field displayed, you will need to nominate if it's a template value or a parameter value. Template values are supplied in the template whereas parameter values are supplied by the system e.g. owner value = current user.
	    a. Select how that field is to be defaulted and if the value can be overridden or is it output only as defined on TMSCRM/TMP-OVR.
	    b. For default values, select or enter the default template value or the variable as required from TMSCRM/TMP-VAR.
	5. If a notification is to be sent for outstanding incidents using this template, then select the applicable notification. (End of day process can be set to call the CRM Notification processor to send the notification for outstanding incidents).
	6. Page down and enter any Main/Optional subjects for the template.
	    a. Select the required key from TMSCRM/ISS-KEY
	    b. Select the override rule from TMSCRM/TMP-OVR
	    c. Select any required value for the Subject.
	7. Click OK to confirm and save the template

Create a system template for an incident	System templates are used by the system to automatically create incidents for specific processes within the system. 1. Menu: Publishing Modules > CRM > CRM Maintenance > CRM Templates > Work with CRM System Template. 2. Click Add 3. Enter the Template ID to identify the template type and add a description for the template. 4. Select the source from TMSCRM/ISS-SRCE. Example A/R payment, Order Processing, Customer Maintenance etc. System templates use TMSCRM/ISS-SRCE then looks at TMSCRM/TMP-VAR Template Variables to determine the variables for the template.
Create a filter template	Filters are used to display specific type of jobs. For example, a filter called TO-DO is used to display list of the incidents which are yet to

	be completed, or filter called SEM is used to display all the seminar details.
Add Text to a template	1. Menu: Publishing Modules > CRM > CRM Maintenance > CRM Templates > Work with CRM Manual Template. 2. From the above menu, select the template to add text to and click option Text. 3. Enter any relevant text and prompt to select required variables. 4. Place < > sign around the area for manual input. 5. Click Ok to save the template.
Add Attachment to a template	You can add attachment to the template, such as an application form. When an incident created from a template with attachment, the user can see the template form (in additional to incident specific attachments). The template attachments can only be downloaded, it cannot be changed or deleted. The path for the attachment must be defined in Data Exchange and the Java agent must be running. 1. Menu: Publishing Modules > CRM > CRM Maintenance > CRM Templates > Work with CRM Manual Template. 2. Select the template to add attachment to and click option Attachment.

Incident levels and Activity setup

The incident levels in an incident determine which activities get assigned to an incident. Work with CRM activity allows you to define all the activities and its associated routes for different combinations of incident levels. Routes within an activity has its own tasks and actions. The initiating route in an activity does not have any tasks or actions, it just kickstarts the activity automatically.

Setup	Steps
Create activity and add routes/tasks	1. Menu: Publishing Modules > CRM > CRM Maintenance > CRM Templates > Work with CRM Activity. Existing incident level combinations and associated activities are displayed.

CRW035 > **Work with Activity Rules**

Scan

Pos to Seq

Seq	Lvl 1	Lvl 2	Lvl 3	Lvl 4	Lvl 5	Activity	Description
10	***	COL	***	***	***		
30	***	AC1	***	***	***	NEWACC	New account
35	INC	***	***	***	***	ORDCRT	Create order
200	CS	***	***	***	***	TAXISS	TST Tax-Credit & Reinvoice
700	***	GEN	***	***	***	ORDCRT	Create order
900	***	ORD	QTE	***	***	CUSTQTE	Customer Quote
901	***	ORD	FTR	***	***	CUSTFTR	Customer Future Order
902	***	ORD	ADJ	***	***		
999	***	ORD	***	***	***	ORDISS	Order issue

2. To create a new activity, click function *Activities*, followed by *Add*.
3. Enter Activity ID and description and click OK to save the activity.
4. Now click *Add* to enter initial/starting route. All activities must have a starting/initial route.

CRW035 > **Activity Route Maintenance > * Add ***

Activity	CUSTQUOTE	Customer quote
Task		* Initial *
Action		Initial first task
Action status	Active	
Next task		
Display seq	10	
Update status to	O	OPN Opened and assigned
Update level 1 to		
Update level 2 to		
Update level 3 to		
Update level 4 to		
Update level 5 to		
Ackn email		
Finalise process		

This initial route will be automatically started by the system when the incident is created. For the starting/initial route the Task and Action should be blank as it will be automatically started by the system.

5. The next task is the task that will be activated when the current task is completed. Select from the available tasks; if the task does not exist then use function **Add** to create a new task:

CRW035 > **Activity Task Maintenance > * Add ***

Activity	CUSTQUOTE	Customer quote
Task	CRTQUOTE	
Description	Create customer quote	
Display seq	10	
Function ID	CRTQTE	Create Quote (Picking Slip)
Function label	Create quote	
Notification	TASKRMD	Task remind
Action Determinant		

	6. Select the applicable function for the new task. The functions are defined in TMSCRM/CRO495A with pre-defined processes that will be activated for the task. 7. If a notification is required for the task, then select the applicable notification from the list of notifications setup for CRM activity. The selected notification will be triggered when the task is actioned. 8. Add remaining routes and tasks until all the routes are entered for the activity.
Assign activity to incident levels	1. Menu: Publishing Modules > CRM > CRM Maintenance > CRM Templates > Work with CRM Activity. Existing incident level combinations and associated activities are displayed. 2. Click *Add.* 3. Enter the search sequence and select applicable incident levels 1-5. 4. Select the activity for the entered levels and click *OK* to save. When an incident is created with these entered levels, the assigned activity along with its tasks will be automatically assigned to the incident.

CRM letter template maintenance

Setup	Steps
Create/maintain CRM letter template	Server based word templates is used for mail merge in CRM. A master word template is initially created in the template directory. Letter template maintenance (CRW200) in CRM picks the master template and allows you to update it with the required variable fields in CRM. The variables available is dependent on the source of the template used in the letter and is defined on control file TMSCRM/TMP-VARL. The updated template then must be registered in CRM to validate the variables on the template. When the template is error-free the version is updated (increased by 1) and the template is then written to the document directory ready for use by the letter generation. The master template on the server will also be updated to reflect the latest change. The server location of the master template and the document directory for the updated word template is defined by function CRW200 in XAM160 Data Exchange and control file **********/DE-SVR.** For any subsequent changes, the system will bring up the latest updated template for alterations. The newly updated template must then be re-registered, and when its error-free and a change has been detected the version would be updated again (increased by 1). The updated word template is updated to the document directory as well as to the server holding the master template.

	The latest version of the template is used when a new e-mail or document is generated.
	
	1. On the template directory create the master template.
	2. In IP1; Menu: Publishing Modules > CRM > CRM Maintenance > CRM Letters > CRM Maintenance of Letter Templates. All the latest CRM letter templates in the document directory is listed. The highlighted template has errors.
	3. Click **Add** to create a new Letter.
	4. Enter the Letter ID and a brief description. The Letter ID must be the template ID of the master template on the template directory. i.e. as created in step 1.
	5. Select the CRM system template that will be used to create an incident for the letter generation. The incident will be created when the CRM letter is generated.
	6. Select the language for the letter (********/LNG).
	7. The server code will default from the setup on XAM160 Document Exchange for function CRW200.
	8. The version number will default to 0000 on creation.
	9. Timestamp will default to current date and time of the Letter template creation.
	10. Click OK to save. The new Letter will be listed with version 0000 awaiting update and registration.
	11. Select the newly created Letter and select option **Word**. Java agent must be running for this. The system will open the word template from the template directory.
	12. Update the template as required with the variables. The variables are dependent on the source of the system template for the incident and is defined on TMSCRM/TMP-VARL.
	13. Save and close the updated template.
	14. Validate the updated letter template using option **Register**. This will check for any errors; subsequently
	    a. if error-free then the template version is updated by 1. The updated latest version is written to the document directory and is ready for use in the letter generation. The master template on the template directory will be updated with the changes.
	    b. if there are errors, then the Letter would be highlighted. View the errors using option **Fields** and amend the template as in step 12 above and re-register.

Contact duplicate maintenance

Setup	Steps
Build match keys for duplicate detection	This program writes the match keys to the Contact Match Key file e.g. if the match key is Email address, then it will update the email address of the selected contact to the Contact Match Key file. These match keys are then used by the duplicate detection program to check for duplicates. 15. Menu: Publishing Modules > CRM > CRM Maintenance > CRM Contact Import > Rebuild CRM Match Key. 16. Select either a single contact or leave blank to rebuild match keys for all contacts. 17. Select the required key set for which you want to rebuild the match key. You can leave blank to select all key sets to rebuild. Key sets established in control file **TMSCRM/NA-MTKH**. The fields for the keys are system defined and setup in **TMSCRM/NA-MTKY**. 18. Click OK to run the rebuild the match keys.
Run the duplicate detection program	Once the match keys are built, the duplicate detection program will use the matching keys and the field definitions as per control files **TMSCRM/NA-MTKH** and **TMSCRM/NA-MTKY** to detect duplicates. 1. Menu: Publishing Modules > CRM > CRM Maintenance > CRM Contact Import > Build CRM Match Key Links. 2. Select either a single contact or leave blank to select all contacts. 3. Select a key set or leave blank to select all. After all the duplicates are detected then you can maintain the duplicates (either allow or disallow) as required (see next step).
Maintain duplicate contacts	When this routine is run, contacts appearing to be duplicates, due to the system finding matching keys are displayed for review and you can then determine whether to flag the contact as an allowed duplicate or change the status of the contact to Closed for true duplicates. 1. Menu: Publishing Modules > CRM > CRM Maintenance > CRM Contact Import > CRM Possible Duplicate Maintenance. 2. If the duplicate contact maintenance is relating to a campaign, then enter the campaign details or click ok to list all the duplicate contacts. 3. Select the contact you which to check duplicates for and click option **CK=Duplicates**. The contact match key set for the duplicate contact along with the status of the contact is displayed. The blank value on **Dp** (Duplicate) column for the contact indicates that the corresponding contact is a duplicate and the user needs to determine if it's allowed to be a duplicate or not.

	4. If the duplicate is okay then select the contact and click **Delete/Undelete** option. An asterisk should appear on the **Dp** (Duplicate) column for the selected duplicate. This action can be reversed if required with **Delete/Undelete**. 5. If the duplicate is not allowed then the user can change the status of the contact to **C=Closed** through Work with Contact CRM option. 6. Click **OK** to confirm the changes made.