

**Virgin Trains West Coast**

CRM

Sitecore – Newsletter

Data Load

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# Document Management

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| **Version Control** | | | |
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| 1.0 | 27/07/2018 | Juanjo Diaz | Initial version |

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# Document Purpose

The purpose of this document is to define Sitecore – Newsletter data is going to be integrated on CRM as well as the process that this load needs to follow.

## 2.1 In Document Scope

The following items are in scope for this document:

* Process definition
* Table definition

## 2.2 Out of Document Scope

The following items are out of scope for this document and will be covered to separate design documents:

* Preference.
* Table mapping from all preference data sources.
* Monitoring

# High Level Overview

## 3.1. Process Context

The objective of this process is to capture prospect and customers and flag them as eligible for Newsletter on CRM.

## 3.2. Process

After Virgin Trains West Coast (VTWC) customer has fulfilled Newsletter web form that information will be send from Watson Campaign Automation (WCA) to IBM\_SYSTEM tables on Phoenix. That data needs to be loaded on different CRM tables to make it available to the BAU team for future campaigns.

## 3.2.1 Process Overview

Every day an WCA process will download Sitecore data from WCA database to an IBM\_SYSTEM table. Sitecore to CRM data load process will capture those rows that have not been processed and insert new individuals, those individuals’ newsletter preferences, update existing individual newsletter preferences, update newsletter customer preferences. The process will only update those preferences if the Sitecore record has been populated after the latest update on that preference. Once all previous information has been inserted/updated the process will flag those column on as processed on the source table.

* **Email Exists**: Validate if provided email exists on Staging.STG\_ElectronicAddress.Address where AddressTypeID = 3
* **Is Individual**: Validate if IndividualID is populated on Staging.STG\_ElectronicAddress.IndividualID
* **Exist Preference**: Validate if a row for the specified Individual or Customer exists on Staging.STG\_IndividualPreference or Staging.STG\_CustomerPreference.
* **Create Individual**: Create a new row on Staging.STG\_Individual.
* **Create KeyMapping**: Create a new row on Staging.STG\_KeyMapping
* **Create ElectronicAddress**: Create a new row on Staging.STG\_ElectronicAddress
* **Create individual Preference for Newsletter**: Create a new row on Staging.STG\_IndividualPreference for the given customer and the Reference.Preference.Name = ‘General Marketing OptIn’
* **Update Individual Newsletter Preference if LastModified date < DateReceived**: Update existing row on Staging.STG\_IndividualPreference for Reference.Preference.Name = ‘General Marketing OptIn’ where Staging.STG\_IndividualPreference.LastModifiedDate < ibm\_system.SP\_Sitecore\_Optins.DateReceived.
* **Insert Customer Newsletter Preference**: Create a new row on Staging.STG\_CustomerPreference for the given customer and the Reference.Preference.Name = ‘General Marketing OptIn’
* **Update Customer Newsletter Preference if lastModifiedData < DateReceived**: Update existing row on Staging.STG\_CustomerPreference for Reference.Preference.Name = ‘General Marketing OptIn’ where Staging.STG\_CustomerPreference.LastModifiedDate < ibm\_system.SP\_Sitecore\_Optins.DateReceived.

Note: ‘General Marketing OptIn’ preference is ONLY Email Channel (Reference.Channel.Name = Email)



# Tables

This section contains a description of the tables involved on this process. Only new or updated table are described here. For more information about already existing tables, please see database design document.

## Staging.STG\_CustomerPreference definition

Stores latest version of customer preferences.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **COLUMN\_NAME** | **PK** | **DATA\_TYPE** | **IS\_NULLABLE** | **LENGTH** | **PRECISION** | **DESCRIPTION** |
| PreferenceID | TRUE | BIGINT | FALSE |  | 19 | Unique Identifier for a Preference. FK to Reference.Preference |
| CustomerID | TRUE | BIGINT | FALSE |  | 19 | Unique Identifier for a CRM Customer. FK to Staging.STG\_Customer |
| ChannelID | TRUE | INT | FALSE |  | 10 | Unique Identifier for a Channel. FK to Reference.Channel |
| Value | FALSE | BIT | FALSE |  | 1 | Customer Preference values. 0 = False | 1 = True |
| CreatedBy | FALSE | INT | FALSE |  | 10 | Unique User Identifier who has created this row |
| CreatedDate | FALSE | DATETIME | FALSE |  |  | Timestamp when this row was created |
| LastModifiedBy | FALSE | INT | FALSE |  | 10 | Last unique user identifier who has modified this row |
| LastModifiedDate | FALSE | DATETIME | FALSE |  |  | Last timestamp when this row was modified |

## Staging.STG\_IndividualPreference definition

Stores latest version of individual preferences.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **COLUMN\_NAME** | **PK** | **DATA\_TYPE** | **IS\_NULLABLE** | **LENGTH** | **PRECISION** | **DESCRIPTION** |
| PreferenceID | TRUE | BIGINT | FALSE |  | 19 | Unique Identifier for a Preference. FK to Reference.Preference |
| IndividualID | TRUE | BIGINT | FALSE |  | 19 | Unique Identifier for a CRM Individual (Prospect). FK to Staging.STG\_Individual |
| ChannelID | TRUE | INT | FALSE |  | 10 | Unique Identifier for a Channel. FK to Reference.Channel |
| Value | FALSE | BIT | FALSE |  | 1 | Customer Preference values. 0 = False | 1 = True |
| CreatedBy | FALSE | INT | FALSE |  | 10 | Unique User Identifier who has created this row |
| CreatedDate | FALSE | DATETIME | FALSE |  |  | Timestamp when this row was created |
| LastModifiedBy | FALSE | INT | FALSE |  | 10 | Last unique user identifier who has modified this row |
| LastModifiedDate | FALSE | DATETIME | FALSE |  |  | Last timestamp when this row was modified |

# Audit Overview

General definition of the proposed audit methodology / system is defined on VTEC Software Architecture - Audit & Log V1.1.docx.

This section defines how customer preferences changes are going to be audited.

We have chosen database triggers to handle audits. By doing that we simplify the audit logic significantly and delegate the responsibility of auditing outside stored procedures, functions or SSIS packages.