Virgin Trains West Coast – Single Customer View (SCV)

Euston Surge and Cancellations Bi-Directional Feed - VTWC

Commercial in confidence

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## **Document** **Management**

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| --- | --- | --- | --- |
| **Version Control** | | |  |
| **Version** | **Date** | **Author(s)** | **Section Changed** |
| 0.1 | 21/08/2018 | Russell Jackson | Initial Draft |
|  |  |  |  |

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| **Review** | | |
| **Version** | **Date** | **Review By** |
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| **Supporting Documents** | | |
| **Document Name** | **Document Purpose** | **Document Link** |
| Merkle VTWC Technical Design | Technical Specification | [Click here](https://teams.microsoft.com/_#/vsd/viewer/teams/https%3A~2F~2Fmerkleinc.sharepoint.com~2Fsites~2FVirginTrainsWestCoast-CRMProject~2FShared%20Documents~2FGeneral~2FDevelopment%20Documentation~2FDesign%20Documentation~2FTechnical%20Overview~2FVTWC%20-Process%20Overview%20v0.1.vsd?thread) |
| Integrating Phoenix with existing service messages - MH 20180719 | Data Flow between Go-Media and | [Click here](https://merkleinc.sharepoint.com/:p:/r/sites/VirginTrainsWestCoast-CRMProject/Shared%20Documents/General/Development%20Documentation/Design%20Documentation/Staging/TOC+/Integrating%20Phoenix%20with%20ExistingServiceMessages-EustonSurgeAndCancellations.pptx?d=w904cfd073f1440d19c1d47d7fa37016a&csf=1&e=d2mtIF) |

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| **Glossary of Terms** | | |
| **Term Name** | **Description** | **Acronym, Synonyms** |
| SCV | Single Customer View | SCV |
| Customer | A person who has registered with VTWC resulting in a record being created in Tracs. This record does not require the person to have made a purchase |  |

## 

## Document Purpose

The intention of this document is to support the development, test and deployment of the bi-directional Euston Surge and Cancelations (Service Message) bi-directional feed.

As per all feeds, this document will support the processing of the Euston Surge and Cancelations information from Pre-processing. schema objects through to Staging. schema objects, and then the reverse for the outbound aspect of this integration.

The ingestion (Load) process populating the Pre-processing. schema objects is defined in a separate document [here](https://teams.microsoft.com/_#/docx/viewer/teams/https%3A~2F~2Fmerkleinc.sharepoint.com~2Fsites~2FVirginTrainsWestCoast-CRMProject~2FShared%20Documents~2FGeneral~2FDevelopment%20Documentation~2FDesign%20Documentation~2FPreProcessing~2FMerkle%20VTWC%20PreProcessing%20Design%20-%20v0.3.).

## Overview

The Euston Surge and Cancellation process supports the SMS communication to customers/travellers informing them when there has been a train cancelation or a prior notification informing them which platform the train will depart from, therefore allowing the customer to get ahead of the queue (surge).

The SMS communication is performed by a 3rd party, Go Media, who receive a daily feed from the TLTracs Database. The feed contains the relevant customer and booking information to contact the individual. It is the responsibility of Phoenix (Merkle) to communicate to new customers on a daily basis providing them an opportunity to optout of such SMS services messages.

The customer opt-outs (along with opens/clicks) are returned to the CRM (Phoenix) database, through the current Unica return feed. It is these opt-outs that are required by Go Media.

When an individual receives an SMS notification, there is an option to opt-out of future notifications by clicking a link in the SMS message. That link will update the Go Media database that the individual no longer want to receive the SMS notification, and Go Media will forward the information on Merkle (in the inbound feed)

Pre-departure email campaign go out 12 days before travel to ensure individuals have the opportunity to opt-out of surge and cancellation SMS communications.

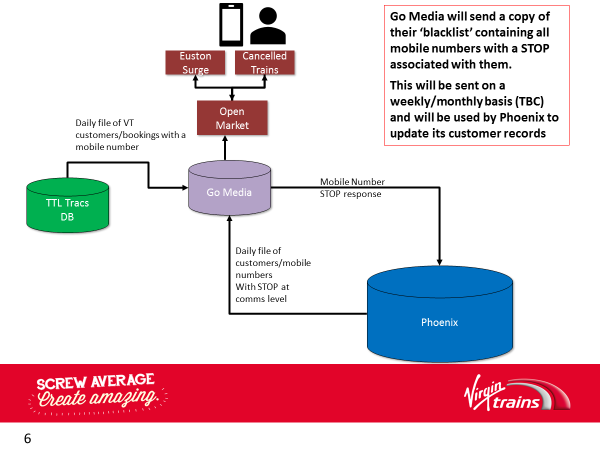
This document will not detail any campaign consideration, campaign management information will be documented and published by the Merkle Campaign Team.

This document covers both feeds;

* Outbound – From Merkle to Go Media – API
* Inbound – From Go Media to Merkle – SFTP

## Visual Overview

The following visual provides an overview of the data flow between Merkle (Phoenix) and Go Media.



## Functional Processing

## Outbound – API

The following functional information details the method and steps taken to supply information from Merkle to Go-Media.

|  |  |
| --- | --- |
| **Ref** | **Description** |
| REF-002 | An API will connect to the Real-Time database with an HTTPS API end-point of <https://api-customer-vtwc.merkleinc.com/test/customers/servicemessages?daysago=3>' \ |
| REF-003 | The information will be transferred using CSV file formatting. |
| REF-004 | Update contact history with all records transferred to Go-Media. Therefore any customer related to the mobile number must have their customerID inserted into the contact history log. |
| REF-005 | If no data found the API will return a 404 message, if the client (user) does not have the relevant permissions a 401 messgaed will be returned and if the services are unreachable a 500 message will be returned. |
| REF-006 | The API will support a single parameter of ‘daysago’ i.e. if Go Media require data from 2 days ago, they will pass ‘2’ as the variable, however the parameter is not mandatory. |
| REF-007 | As requested by the client, the API will support Basic Auth. |

## Outbound – Database Sync

The information to be supplied to Go Media will be transferred from the CRM Production and the IBM\_Systems database, to the CRM Real-time (OLTP) database using daily SSIS batch processes.

Identify records that have been contacted through the Euston Surge campaign and responded with an opt-out request within the last 24 hours. As agreed with the client, if a traveller opts out of cancelled trains, they are also opted out of Euston Surge.

|  |  |
| --- | --- |
| **Ref** | **Description** |
| REF-001 | As the eligible oupouts are captured through the email marketing communication, the information shared with the Real-Time database comes from the [ibm\_system].[dbo].[SP\_EustonSurge\_CVI] table |
| REF-002 | The following fields need to be transferred to the Real-Time database;   * Number * OptoutDate   Selecting only the last 24 hours worth of information and where the individual has opted out of the Euston surge campaign.  Match the [ibm\_system].[dbo].[SP\_EustonSurge\_CVI] table to the [CRM].[Staging].[STG\_KeyMapping] to return the mobile number on CustomerID |
| REF-003 | The data will be inserted into the table that the outbound API extracts information from. [CRM\_RT].[api\_customer].[ServiceMessage] |
| REF-004 | The transfer process should execute when other users are not accessing or updating the system and run daily. |
| REF-005 | The SSIS execution will be scheduled using SQL Agent |

## Field Mapping - Outbound

|  |  |  |  |
| --- | --- | --- | --- |
| **Feed Details** | | | |
| **Feed ID/#:** | 61 | **Feed Format** | Delimited |
| **Feed Name** | Flag File | **Field Delimiter** | | |
| **Feed Source** | Phoenix CRM (Merkle) | **Record Delimiter** | LF |
| **Frequency** | Real-Time | **Header/Footer/Both** | Header |
| **Input/Output** | Output | **Text Qualifiers** | Yes |
| **Output Recipient** | Merkle | **Encryption** | Other |
| **CDI Processing** | No | **Delivery Mechanism** |  |
| **Update Critical** | No | **File Location** |  |
| **Incremental / Full Refresh** | Incremental | **Contact Information** | N |
| **Physical File Naming Convention** | GOMEDIA\_MERKLE\_VT\_DDMMYYYY.txt | **Count file received** | No |

|  |  |  |  |
| --- | --- | --- | --- |
| **Field\_Name** | **Field\_Business\_Name** | **Field\_Description** | **Field\_Data\_type** |
| [Production].[Customer].[MobileNumber] | Mobile Number | Mobile phone number | varchar |

## Consideration, Constraints and Dependencies - Outbound

|  |  |
| --- | --- |
| **Ref** | **Description** |
| CCD-001 | Depending on when Go Media communicate to the customer, they could potentially contact someone who has opted out by have not received the information from Phoenix. This is a known limitation of the process. |
| CCD-002 | Only the mobile number is extracted from Phoenix. The client is aware that although mobile numbers can be related to a single individual, there is no guarantee and therefore should use a Merkle unique identifier. |
| CCD-003 | Only those customers with a mobile number (prefixed with ‘07’) will be included in the email campaign. This is a consideration for the campaign manager. |
| CCD-004 | Euston Surge and Cancellation are separate communications, and it is also evident that Go Media will perform other communications, however the bi-directional feed doesn’t support a lower grain of data other than mobile number. This means that, if an individual opts outs of Euston Surge, they will also be opted out of all other communications. Virgin trains will make this obvious in the consent message. |
| CCD-005 | Maintain mobile list in RealTime database to support the functionality to extract more than 1 day(s) information. |
| CCD-006 | The security protocol will be to use Basic Auth with whitelisted IP addresses. |

## Functional Processing – Inbound

The following steps provide an overview of the functional approach to be taken in order to process opt-outs from Go-Media.

|  |  |
| --- | --- |
| **Ref** | **Description** |
| REF-001 | Load data from SFTP location. |
| REF-002 | Ingest information [preProcessing] table and load into [Staging]. |
| REF-003 | Update customer preference information, setting customers to opted out of SMS service messages. Outputs should be identified as 3rd party optouts. |
| REF-004 | Update process and operational auditing. |

## 

## Field Mapping - Inbound

|  |  |  |  |
| --- | --- | --- | --- |
| **Feed Details** | | | |
| **Feed ID/#:** | 62 | **Feed Format** | Delimited |
| **Feed Name** | Euston Surge | **Field Delimiter** | | |
| **Feed Source** | Go Media | **Record Delimiter** | LF |
| **Frequency** | Weekly | **Header/Footer/Both** | Header |
| **Input/Output** | Input | **Text Qualifiers** | No |
| **Output Recipient** | Merkle | **Encryption** | Other |
| **CDI Processing** | No | **Delivery Mechanism** | Merkle SFTP |
| **Update Critical** | No | **File Location** | 0 |
| **Incremental / Full Refresh** | Incremental | **Contact Information** | N |
| **Physical File Naming Convention** | GOMEDIA\_MERKLE\_VT\_DDMMYYYY.txt | **Count file received** | No |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field\_Name** | **Field\_Business\_Name** | **Field\_Description** | **Field\_Data\_type** | **Business Rules** |
| MobileNumber | Mobile phone number | Mobile number for those individuals who opt out | int | Match on mobile number and insert opt out flag in the customer.preference table |
| SourceDate | Source date |  | Int |  |

## Consideration, Constraints and Dependencies – Inbound

|  |  |
| --- | --- |
| **Ref** | **Description** |
| CCD-001 | Opt-out should be global optout for all service messages, regardless that the customer has opted out of only Euston Surge. |
| CCD -002 | By matching only on mobile number, there is potential that the process over suppress as mobile numbers can be shared amongst more than one person. |