Campaign Manager

# Tables Used

1. PROJECTID\_MASTERCOMPANIES
2. PROJECTID\_MASTERCONTACTS
3. PROJECTID\_PICKLISTS
4. PROJECTID\_VALIDATIONS
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7. C\_PROJECT\_SETTINGS
8. C\_FIELD\_MASTER
9. C\_PICKLIST
10. ALLOCATION\_FILTER
11. ALLOCATION\_FILTER\_CONDITION
12. FILTER\_ASSIGNMENT
13. USERS
14. COUNTRY

# PROJECT SETTINGS

Table Name: C\_PROJECT\_SETTINGS

|  |  |  |  |
| --- | --- | --- | --- |
| Column Names | | Possible Values | Description |
| SETTING\_ID\_P |  | | Unique ID |
| PROJECT\_ID | RBIUS\_001 | |  |
| COMPANY\_TABLE | TopWRC002\_Mastercompanies | | Name of Master Company Table |
| CONTACTS\_TABLE | RBIUS\_001\_Mastercontacts | | Name of Master Contact Table |
| FILTER\_VIEW | TopWRC002\_FILTER\_VIEW | | Not in use |
| ADD\_BUTTON\_WR | Y/N | | Enable/Disable New Company Button for WR |
| ADD\_BUTTON\_TR | Y/N | | Enable/Disable New Company Button for TR |
| TELEPHONE\_FORMATTING | Y/N | | Enable/Disable Automatic Telephone formatting |
| MAX\_CONTACT\_COUNT |  | | Maximum no. of Contacts for complete(0 denotes Unlimited) |
| MIN\_CONTACTS\_COMPLETE |  | | Minimum no. of Contacts for complete (0 denotes Unlimited) |
| MIN\_CONTACTS\_PARTIAL\_COMPLETE |  | | Minimum no. of Contacts for partial complete (0 denotes Unlimited) |
| ALLOW\_SWITCHBOARD\_NUMBER\_IN\_CONTACT | Y/N | | Allow Company Telephone number in Contact Telephone Number |
| ALLOW\_GENERAL\_EMAIL | Y/N | | Allow company emails for(sales, info) |
| ALLOW\_PUBLIC\_DOMAIN\_EMAIL | Y/N | | Gmail, Hotmail |
| ALLOW\_DUPLICATE\_EMAIL | Y/N | | Check dupe for complete contact |
| ALLOW\_DUPLICATE\_JOBTITLE | Y/N | | Check dupe for complete contact |
| ALLOW\_DUPLICATE\_EMAIL\_ACROSSPROJECT | Y/N | | Check Email dupe with entire project |
| FREEZE\_TR\_COMPLETED\_RECORDS | Y/N | | Freeze TR Completed Contact to WR |
| FREEZE\_WR\_COMPLETED\_RECORDS | Y/N | | Freeze WR Completed Contact to TR |
| FREEZE\_TR\_COMPANY\_COMPLETES | Y/N | | Freeze TR Completed company to WR |
| FREEZE\_WR\_COMPANY\_COMPLETES | Y/N | | Freeze WR Completed company to TR |
| DEPARTMENT\_COUNT |  | | Not in use |
| CALLSCRIPT\_ID |  | | Unique ID of Call Script for particular project(BLOB table still in MSSQL server) |
| SPELLCHECK\_JOBTITLE | Y/N | | Enable/Disable spell check (Validation table needs be filled even if this option is Enabled) |
| STATUS | Active/Inactive | | Entire setting state |
| CREATED\_BY |  | |  |
| CREATED\_DATE |  | |  |
| UPDATED\_BY |  | |  |
| UPDATED\_DATE |  | |  |

# Field Settings

Table Name: C\_FIELD\_MASTER

|  |  |  |  |
| --- | --- | --- | --- |
| Column Names | | Possible Values | Description |
| PROJECT\_ID |  | |  |
| TABLE\_NAME | Master / MasterContacts | |  |
| FIELD\_NAME\_CAPTION |  | | Name of Field (Appears on Label) |
| FIELD\_NAME\_TABLE |  | | Actual name of Column as exact as column name in Table |
| FIELD\_TYPE | UserDefiend / NULL | | UserDefiend specifies the control to be displayed on screen(Other the userdefind columns are used in conditions or grid) |
| FIELD\_SIZE |  | | Max text Size of the control.  The control will not allow text more than this size. |
| SEQUENCE\_NO |  | | Order in which the controls are displayed |
| DEFAULT\_VALUE |  | | Not Implemented |
| CONTROL\_TYPE | CHECKEDLISTBOX  DATETIMEPICKER  EMAIL  EXTENDEDCOMBO  TELEPHONE  TEXTBOX  WEBSITE | | Type of control (Text box, Combo, Telephone etc.) |
| PICKLIST\_CATEGORY |  | | If control is EXTENDEDCOMBO picklist category has to be specified to load list into combo(This controls can be edited directly on grid) |
| PICKLIST\_SELECTION\_TYPE | MultiList  MultiWord  SingleWord | | SingleWord – Only single word from list can be selected(Cannot edit word)  MultiWord – Multiple words can be selected which forms a sentence(Can be edited)  MultiList – Multiple words into list separated by ‘|’(Cannot be edited) |
| GRID\_CELL\_SIZE |  | | Size of the cell on grid |
| SHOW\_ON\_GRID | Y/N | | Whether the field to be displayed on grid |
| SHOW\_ON\_CRITERIA | Y/N | | Whether the field to be displayed on conditions |
| SPELLCHECK | Y/N | | Whether Spell check is enabled for the control |
| READONLY | Y/N | | Whether the control is read-only. |
| SORTABLE\_COLUMN | Y/N | | Whether the column can be sorted or not. |
| FORMATTING | EMAIL  MANDATORY  LOWER  UPPER  PROPER\_CASE  ONLYALPHA  REMOVE\_SPECIAL\_CHARACTERS  TELEPHONE  ONLYNUMERIC  WEBSITE | |  |
| ACTIVE\_COLUMN | Y/N | | Columns which are visible in the software as Control |
| Visibility | TR / WR / TR|WR | | To whom the control belongs to.(WR, TR or Both |
| FieldID |  | | Unique ID of the table |

**Formatting**

* PROPER\_CASE – Usual proper casing
* NAME\_CASING – Casing for Names(Eg: McColin, O’Corner)
* JOBTITLE\_CASING – Casing for Jobtitle(Eg: CEO, IT upper case)
* UPPER – Upper Case
* LOWER – Lower Case
* ONLYALPHA – Allow only alphabets
* ONLYNUMERIC – Allow only Numbers
* EMAIL – Email Syntax(Textbox turns red if syntax fails)
* WEBSITE - Website Syntax(Textbox turns red if syntax fails)
* REMOVE\_SPECIAL\_CHARACTERS – Only Alphanumeric
* MANDATORY – Textbox turns red if empty
* TELEPHONEMASTER – Clears Telephone number if country changes(Company)
* TELEPHONECONTACTS - Clears Telephone number if country changes(Contact)

# Points to Remember

1. Values in FIELD\_NAME\_TABLE must match with respective Company or Contact table
2. FIELD\_TYPE: Values other than UserDefiend will not be considered as dynamic control
3. PICKLIST\_CATEGORY must match with PicklistCategory Column in PickList table. And PICKLIST\_SELECTION\_TYPE is must if PicklistCategory is specified.

# Validations

Table Name: PROJECTID\_VALIDATIONS

|  |  |  |  |
| --- | --- | --- | --- |
| Column Names | | Possible Values | Description |
| TABLE\_NAME | TopWRC002\_Mastercompanies  TopWRC002\_Mastercontacts | | Table to be Validated |
| VALIDATION\_FOR | TR\_CONTACT\_STATUS  TR\_PRIMARY\_DISPOSAL | | Perform validation for these columns |
| VALIDATION\_TYPE | MANDATORYFIELDS  MANDATORYCONTACTSTATUSCONTAINS  EMAILCOMPANYCHECK  NAMEDUPECHECK  EMAILDUPECHECK  EMAILPUBLICDOMAINCHECK  JOBTITLESPELLCHECK  EMAILDOMAINMATCHWARNING  UPDATEONCE  NOTEQUALS  POPULATE  GETLIST  CONTAINS  NOTCONTAINS | | Type of validation to be done on the column |
| CONDITION | COMPLETE SURVEY  NEW AND COMPLETE  NEW AND INCOMPLETE  VERIFIED AND COMPLETE | | The column will be validated only if the column has the these values |
| VALIDATION\_VALUE | ADDRESS\_1  CITY  COMPLETE|REPLACEMENT AND COMPLETE|UPDATE AND COMPLETE|VERIFIED AND COMPLETE | | These columns will be validated |
| RESEARCH\_TYPE | TR / WR | | Validation for Teleresearch or webResearch |
| OPERATION\_TYPE | Validation / PreUpdate / PostUpdate | |  |
| ID |  | | Unique ID |

Example: Read without Bracket content

In **TopWRC002\_Mastercompanies (**TABLE\_NAME**)** if **TR\_PRIMARY\_DISPOSAL (**VALIDATION\_FOR**)** is **COMPLETE SURVEY (**CONDITION**)** then **COMPANY\_NAME (**VALIDATION\_VALUE**)** Column is **MANDATORYFIELDS (**VALIDATION\_TYPE**)**

**Operation\_Type:**

* **Validation –** Validates the data like check for mandatory or Email syntax etc.
* **PreUpdate –** Run time data population (Like Job title list based on job function (Or) Same Location copies address from company to contact)
* **PostUpdate –** Updates data internally based on condition (if TR\_Contactstatus is ‘New and Complete’ then update WR\_ContactStatus as ‘Teleresearched’)

|  |  |  |
| --- | --- | --- |
|  | Validation Type |  |
|  | MANDATORYFIELDS | * Makes a field Mandatory. * Can specify multiple fields separated by ‘| ‘(Pipe bar) which means one of those is Mandatory. |
|  | MANDATORYCONTACTSTATUSCONTAINS | * Ensures if company contains list of ‘contact status’   if the company is disposed as ‘Complete’ |
|  | EMAILCOMPANYCHECK |  |
|  | NAMEDUPECHECK |  |
|  | EMAILDUPECHECK |  |
|  | EMAILPUBLICDOMAINCHECK |  |
|  | JOBTITLESPELLCHECK |  |
|  | EMAILDOMAINMATCHWARNING |  |
|  | UPDATEONCE |  |
|  | NOTEQUALS |  |
|  | POPULATE |  |
|  | GETLIST |  |
|  | CONTAINS |  |
|  | NOTCONTAINS |  |

**Example:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Operation Type** | **Table Name** | **Validation For** | **Validation Type** | **Condition** | **Validation Value** | **Research Type** |
| Validation | CRUCRU005\_Mastercontacts | TR\_CONTACT\_STATUS | MANDATORYFIELDS | NEW AND INCOMPLETE | FIRST\_NAME | TR |
| Validation | CRUCRU005\_Mastercontacts | TR\_CONTACT\_STATUS | JOBTITLESPELLCHECK | REPLACEMENT AND COMPLETE | OTHERS\_JOBTITLE | TR |

1. First\_Name is Mandatory if TR\_ContactStatus is ‘New and Complete’

# Points to Remember

1. Values in VALIDATION\_VALUE must match with columns in respective Company or contact table.
2. Validation will not check for free zed contacts.

# Filter

Table Name: ALLOCATION\_FILTER

|  |  |  |  |
| --- | --- | --- | --- |
| Column Names | | Possible Values | Description |
| FILTER\_ID |  | | Unique ID |
| PROJECT\_ID |  | |  |
| FILTER\_NAME |  | |  |
| SQLTEXT |  | | Query for the filter |
| FILTER\_DESC |  | | Filter description |
| Active |  | | Whether the filter is active |
| USERDEFIEND | Y/N | | If userdefeind is N then the filter cannot be edited on software(the query is formed at backend) |
| USERACCESS | TR/WR | | Who is going to use |
| CREATED\_DATE |  | |  |
| CREATED\_BY |  | |  |
| UPDATED\_DATE |  | |  |
| UPDATED\_BY |  | |  |

# Points to Remember

1. Query formed in the SQLTEXT field will filter Time zone records, DATECALLED ISNULL and Flag = TR/WR by default.
2. If the condition has PRIMARY\_DISPOSAL then DATECALLED < Getdate() will append by default.
3. Records with USERDEFIEND = N cannot be edited in software.

# Filter Query Conditions

Table Name: ALLOCATION\_FILTER\_CONDITION

|  |  |  |  |
| --- | --- | --- | --- |
| Column Names | | Possible Values | Description |
| ID |  | | Unique ID |
| PROJECT\_ID |  | |  |
| FILTER\_ID |  | | FilterID which is linked with ALLOCATION\_FILTER Table |
| FIELD | EG: COMPANY\_NAME | | Column to be filtered |
| CONDITION | Contains  Equals | | Filter condition |
| VALUE | EG: Merit Group, Cyberdyne Inc., | | Value of column |
| CREATED\_BY |  | |  |
| CREATED\_DATE |  | |  |
| UPDATED\_BY |  | |  |
| UPDATED\_DATE |  | |  |

# Filter Assignment

Table Name: FILTER\_ASSIGNMENT

|  |  |  |  |
| --- | --- | --- | --- |
| Column Names | | Possible Values | Description |
| ID |  | | Unique ID |
| PROJECT\_ID |  | |  |
| FILTER\_ID |  | | FilterID linked with ALLOCATION\_FILTER Table |
| USERNAME |  | | User to whom the filter is assigned |
| USERACCESS | TR/TR | | User Type |
| CREATED\_DATE |  | |  |
| CREATED\_BY |  | |  |
| UPDATED\_DATE |  | |  |
| UPDATED\_BY |  | |  |

# User Settings

Table Name: USERS

|  |  |  |  |
| --- | --- | --- | --- |
| Column Names | | Possible Values | Description |
| ID |  | | Unique ID |
| USERNAME |  | |  |
| USERTYPE | ADMIN  Manager  Agent  QC | | Manager, QC can access TR or WR based on USERACCESS assigned to them.  Agents – Only Exceptional Agents |
| USERACCESS | WR/TR | |  |
| CREATED\_BY |  | |  |
| CREATED\_DATE |  | |  |
| UPDATED\_BY |  | |  |
| UPDATED\_DATE |  | |  |

# Hard-Coded Columns

Company Table

|  |  |
| --- | --- |
| Column | Reason |
| MASTER\_ID |  |
| COMPANY\_ID |  |
| COMPANY\_NAME | To get company name in call script |
| ADDRESS\_1 | To get info in call script |
| ADDRESS\_2 |
| ADDRESS\_3 |
| CITY |
| COUNTRY | Many Places. To get time zone, Dial code.  Country is must in loading records and Country Name must match in Country Table |
| SWITCHBOARD | To get Telephone number on call script screen and on main screen ribbon |
| WEB | To get website domain for email suggestion formation |
| GENERAL\_EMAIL |
| TR\_PRIMARY\_DISPOSAL | Static Fields |
| TR\_SECONDARY\_DISPOSAL |
| TR\_AGENTNAME |
| TR\_DATECALLED |
| TR\_TIMESCALLED |
| TR\_COMMENTS |
| TR\_AGENTNOTES |
| TR\_PREVIOUS\_PRIMARY\_DISPOSAL |
| TR\_PREVIOUS\_SECONDARY\_DISPOSAL |
| TR\_PREVIOUS\_AGENTNAME |
| TR\_PREVIOUS\_DATECALLED |
| WR\_PRIMARY\_DISPOSAL |
| WR\_SECONDARY\_DISPOSAL |
| WR\_AGENTNAME |
| WR\_DATE\_OF\_PROCESS |
| WR\_COMMENTS |
| WR\_AGENTNOTES |
| WR\_PREVIOUS\_PRIMARY\_DISPOSAL |
| WR\_PREVIOUS\_SECONDARY\_DISPOSAL |
| WR\_PREVIOUS\_AGENTNAME |
| WR\_PREVIOUS\_DATE\_OF\_PROCESS |
| FLAG | Many Places. Specify TR or WR. |
| NEW\_OR\_EXISTING | While creating New company |
| CREATED\_BY | Default Fields |
| CREATED\_DATE |
| UPDATED\_BY |
| UPDATED\_DATE |

Contact Table

|  |  |
| --- | --- |
| Column | Reason |
| CONTACT\_ID\_P |  |
| MASTER\_ID |  |
| TR\_CONTACT\_STATUS | Many Places |
| WR\_CONTACT\_STATUS |  |
| FIRST\_NAME | Get names for email suggestions, Remove empty row(only if FIRST\_NAME, LAST\_NAME, JOB\_TITLE, CONTACT\_EMAIL, CONTACT\_STATUS are empty), Duplicate check within Contacts, Warning message if First and Last Names doesn’t match email, To display in Call script |
| LAST\_NAME |
| JOB\_TITLE | Remove empty records like name field and Call script |
| CONTACT\_EMAIL | Remove empty records, To get email domain from existing contact, Bulk email format update, Name and domain match warning, Call script |
| CONTACT\_TELEPHONE | Check existence of switchboard number in contacts |
| TR\_UPDATED\_DATE | Add new Contact, Modify existing record, Calculate today’s count on Processed List |
| WR\_UPDATED\_DATE |
| TR\_AGENT\_NAME | Many Places |
| WR\_AGENT\_NAME |
| CREATED\_BY | Default Fields |
| CREATED\_DATE |
| UPDATED\_BY |
| UPDATED\_DATE |

# Short-Cuts

Process Screen:

Contact Update Screen: Ctrl + U

Add New Company: Ctrl + N

Processed List Screen: Ctrl + P

Reload: F5

Filter: Ctrl + Shift + L (Toggle)

Clear: Ctrl + Shift + L (Toggle)

Enter ID: Ctrl + I

Open Selected Company: Enter

Contact Update:

Navigate Tabs: Ctrl + Left | Ctrl + Right

Switch between Panels: F6

Switch between Panels Revers: Shift + F6

Open Custom Combo List: F2

Open Agent Notes: Ctrl + Shift + N (Toggle)

Add New Contact: Alt + A

Expand Grid: Ctrl + E (Toggle)

Save: Ctrl + S

Close: Ctrl + Q