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MAKING CRM MAKE SENSE

Concep2SLX - Implementation

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Author: Mike Spragg
Contact: 0845 1368444

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empath-e is registered in England and Wales No: 04745733. Vat No. GB 901 2597 45

Registered Office: Unit 1, Freemantle Business Centre, Millbrook Road East, Southampton, SO15 1JR

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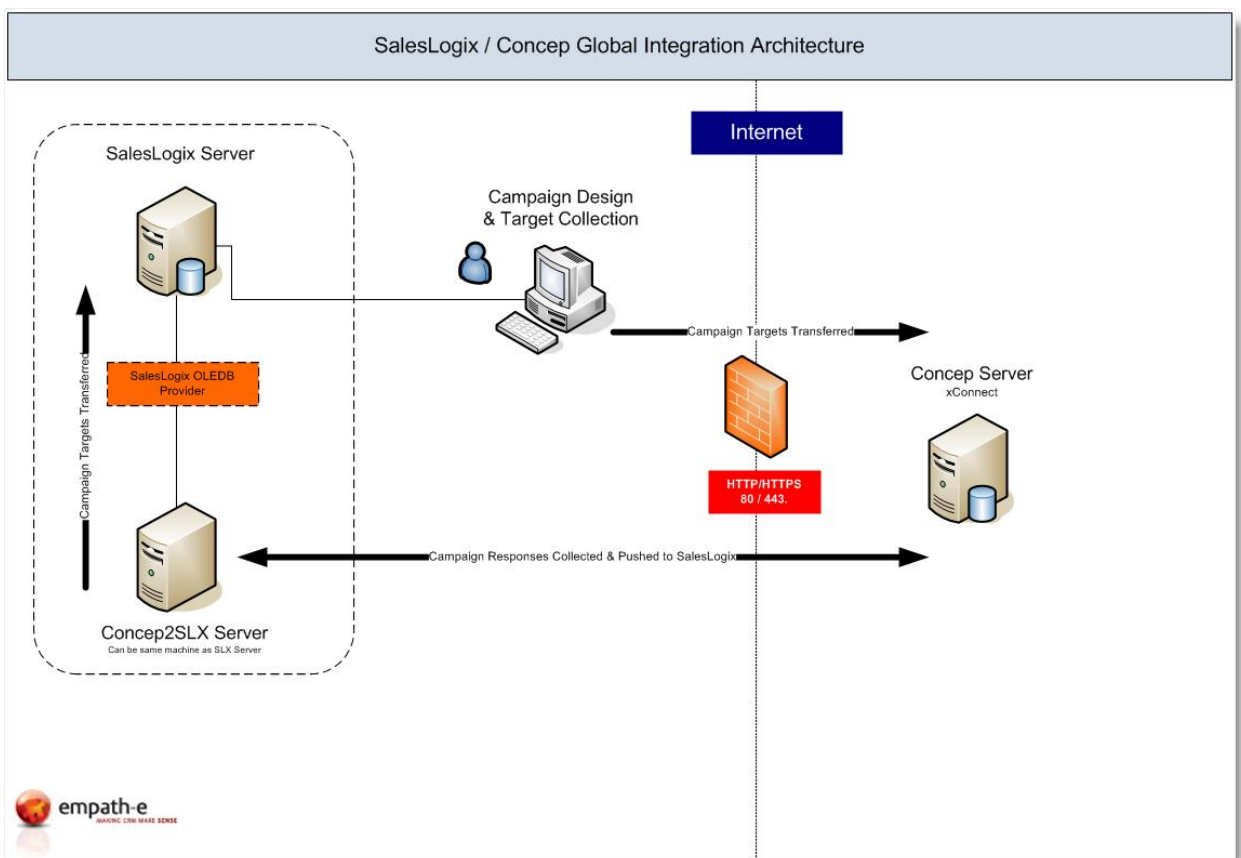


1.0 SYSTEM OVERVIEW

The SalesLogix to Concep Global application has been designed to easily integrate within SalesLogix with minimal impact upon the existing system.

There are two parts – the SalesLogix client side, enabling you to upload campaign targets to Concep and the Concep2SLX Server component which is a windows service that polls the Concep server and downloads activities (URL Clicks, File Downloads, Undeliverables etc) into SalesLogix.

The polling service (**Concep2SLX.exe**) can reside on any windows server – the database server or SalesLogix server for example.



2.0 PRE-REQUISITES

Installation Requirements

- SalesLogix v6.x or v7.x plus all normal pre-requisites for SalesLogix.
- **Important:** Backup the production system and ensure you have a working backup by restoring this to a development database.
- Uninstall any e1 business Limited Marketing/e1 Target Bundles should they exist – these will conflict with the new system and should be de-installed prior to installing the new application.
- Ensure you have a valid Internet Connection available (especially if using VMWare in a test environment for example), as the application works via HTTP/HHTPS, and will need access to the Internet in order to communicate with the Concep Global application.



Functional Changes

The following views have changed, or been added, within SalesLogix:

Plugin	Description
Forms	System: Add Edit Marketing Services User (Updated)
Forms	System: Manage Marketing Services (Updated)
Forms	System: Marketing Services Launch Screen (Updated)
Forms	Campaign: Targets (Updated)
Forms	Contact: Messenger (New)
Forms	Campaign: Messenger (New)

Table

The following table is added to SalesLogix and stores the responses being returned from Concep

CONCEP_ACTIONS_1		
CONCEP_ACTIONS_1ID	[char] (12)	Unique/Primary ID
CONTACTID	[char] (12)	The ContactID of responder
CREATEUSER	[char] (12)	
CREATEDATE	[datetime]	
MODIFYUSER	[char] (12)	
MODIFYDATE	[datetime]	
CAMPAIGNID	[char] (12)	The CampaignID for this response
RESPONSEDATE	[datetime]	Date of Response/Click
ACTIONTYPE	[varchar] (64)	ActionType from XML Response
ACTIONDETAIL	[varchar] (2000)	URL/Detail of ActionType
STATUS	[varchar] (8)	Set by Mappings tab in Configuration
MESSENGERACCOUNT	[varchar] (32)	<i>(Customer Specific) – Office Name</i>
CONCEPID	[varchar] (16)	Unique MRID coming from Concep



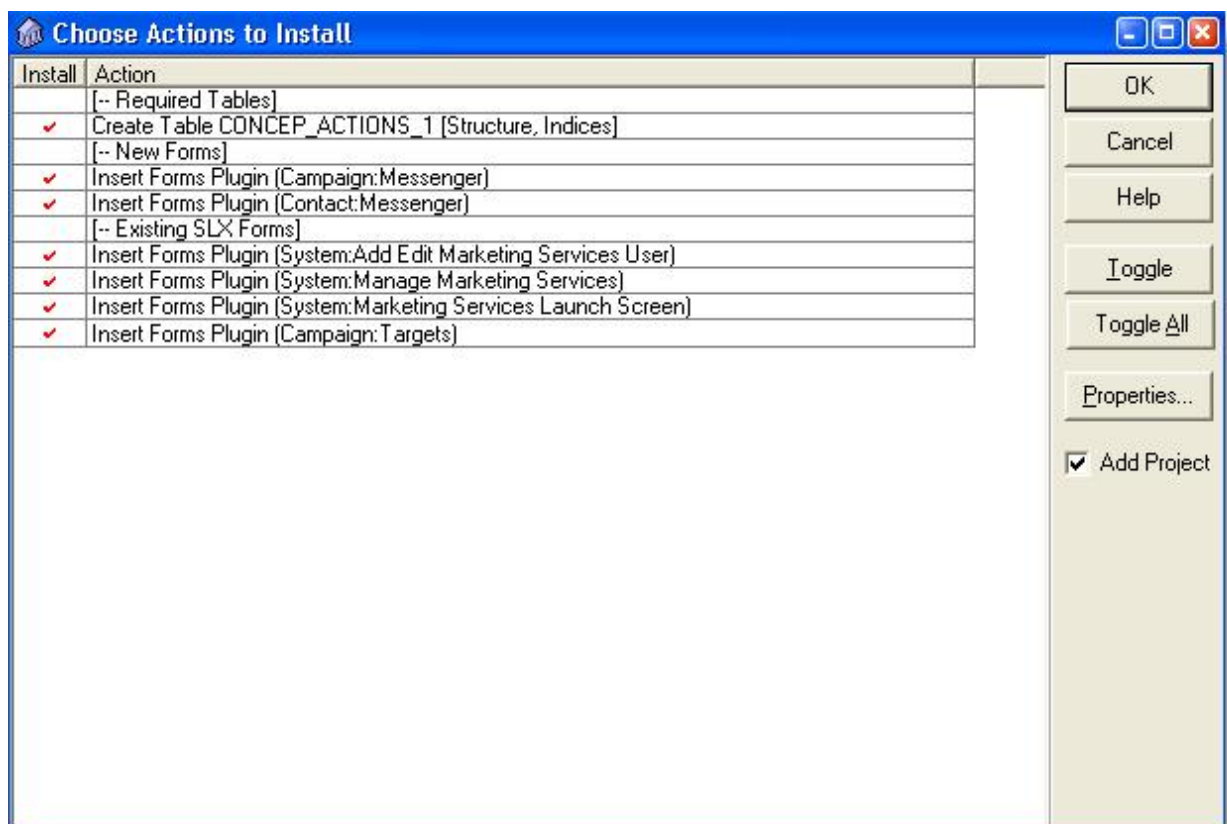
3.0 INSTALLATION

SalesLogix

Using the *SalesLogix Administrator*, apply the following bundles:

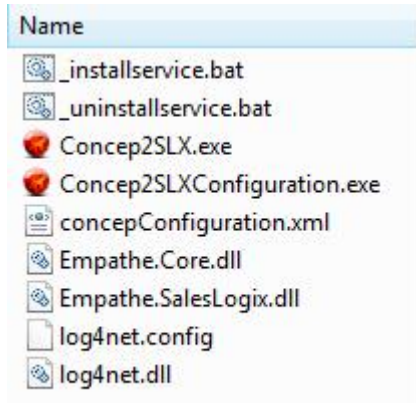
- **Marketing Feature Pack v6.2.5.sxb** to setup the required requisite forms/tables/scripts etc.
 - This can be obtained from the installation folder or via ftp.empath-e.com in the folder /ToCustomer/SalesLogix/6.2/Marketing Feature Pack
 - This replaces the old legacy forms/scripts and replaces them with the new active forms/scripts version
 - **DO NOT APPLY THIS BUNDLE IF YOU ARE USING v7.2 OR HIGHER– AS THIS ALREADY FORMS PART OF THE BASE PRODUCT AND IS NOT REQUIRED.**
- **empath-e.SLX2Concep.sxb** to overlay the above with the new forms/scripts required for the Concep Integration

All plugins contained in the bundle will replace the existing plugins where necessary and the old plugins will be de-released and, therefore, available – should you need to revert to them at any time.



Server Service

Copy the following files to a folder on the server (we suggest C:\CONCEP2SLX) you plan to use as the polling server service.



Next, simply run the **_installservice.bat** file and this will install the server service. **Note:** You may need to modify this batch file to modify the path requirements.

If you decide to uninstall the service – run the **_uninstallservice.bat** to remove the service correctly.

Distributed Link Tracking Client	Enables client programs t...	Started	Automatic	Local System
Distributed Link Tracking Server	Enables the Distributed Li...		Disabled	Local System
Distributed Transaction Coordi...	Coordinates transactions ...	Started	Automatic	Network S...
DNS Client	Resolves and caches Dom...	Started	Automatic	Network S...
empath-e : Concep2SLX	Polling service for Concep...		Automatic	Local System
Error Reporting Service	Collects, stores, and repo...		Manual	Local System
Event Log	Enables event log messag...	Started	Automatic	Local System
File Replication	Allows files to be automat...		Manual	Local System

You are now ready to configure the system, which you should do prior to starting it.

Server Service Configuration

All configurations are performed by running the application **Concep2SLXConfiguration.exe**



Configuration Options

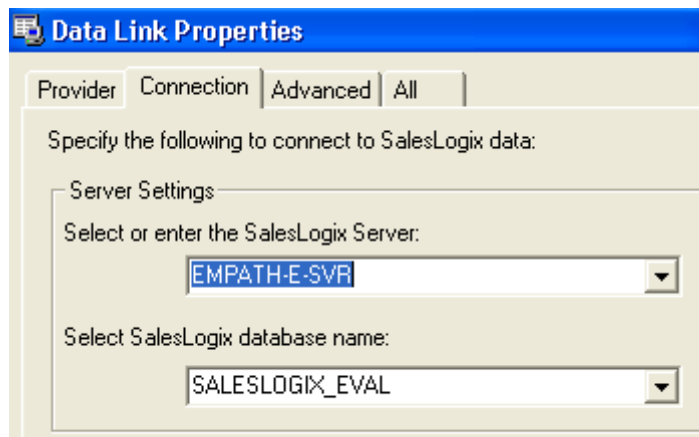
Service

This tab contains the link information to Concep and parameters for service polling:

Service URL	The HTTP or HTTPS link to Concep – defaults to http://campaigner.conceptglobal.com/xconnect/xconnect.asp? But could also be: https://secure.campaigner.conceptglobal.com/xconnect/xconnect.asp?
User ID	The UserID (supplied by Concep) as the Admin account to login to Concep
Password	The password for above account
Poll Interval	Defines how often the service should contact the Concep server and establish if any data needs adding to SalesLogix – a default of 10 mins should be sufficient
Range Overlap	Defines the overlap period – we suggest 20 mins – and is used should the Concep service become unavailable. The service will poll for the end time as the current time – with a begin time minus this overlap period.
Campaign Day	Defines when to stop recording actions e.g. when set at 7 days (the default) any campaign results that exceed this period will not be recorded.

SalesLogix

This tab contains the connection parameters for SalesLogix:



Server Name	From the SalesLogix Data Link, enter the SalesLogix Server Name (not the physical server name)
Database Name	From the SalesLogix Data Link, enter the SalesLogix Database Name (not the physical/logical database name)
Port	Enter the port number that SalesLogix Server listens on (default = 1706). A value of 0 assumes the default port (1706)
User Name	Enter the username (typically Admin)
Password	Enter the password for the above account



Mappings

This section deals with the rules surrounding what actions to record, how many clicks to record and what status to set within the CONCEP_ACTION_1 table.

Type ID	Consult with Concep on this value. The defaults of 1/2/3/6/7/8/11 are valid for the current version of Concep.
Log Status	You can define whether this action type is recorded – or ignored.
Status Text	For each action type, and assuming the action is logged, this status is added and enabled you to onward process the table i.e. look for all Opt-Out actions and create a group within SalesLogix to process those.
Type Text	For this action type, this text is recorded into the table (as opposed to using a coding system)
Max Records	This defines how many times the system will record this action. For example, if a user opens an email and clicks a link 20 times – it will only be recorded 5 times (by default). You can increase or decrease this figure to suit your requirements.

Should the Concep system change in the future you can add/delete or amend the figures here, upon advice from Concep.

Starting the Service

Once you have configured the application, you are now ready to start the service. Go into Services and start the **"empath-e : Concep2SLX"** service. The service will start and, after the polling period, immediately connect with the Concep service and begin to bring data into SalesLogix (if applicable i.e. you have sent a campaign and are logging responses) – otherwise, it will simply poll until there is data to record.

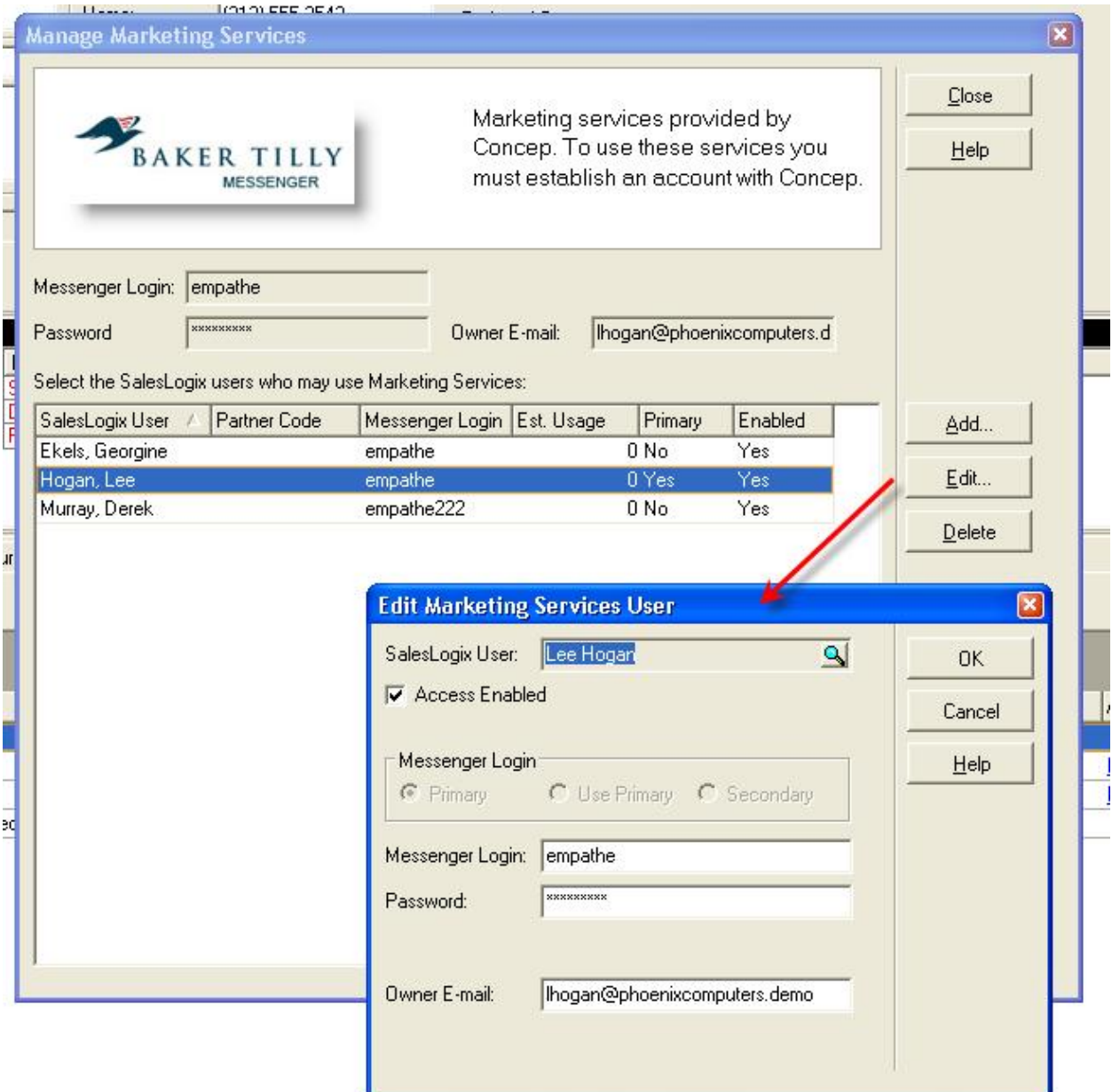
This completes the server side installation and configuration. You should consult the document **"Concep2SLX-UserGuide.doc"** for further information on how to create campaigns, deliver them to Concep and analyse results being returned by Concep2SLX.



4.0 DEFINE SALESLOGIX/CONCEP USERS

In order to be able to submit campaign targets to Concep you, as the administrator, will need to define who can use the system.

This is managed via **Tools | Manage | Marketing Services** within SalesLogix. You should see the following: -



In here, add the users required. For the Messenger Login use the credentials provided by Concep – for one user - select the Primary option. You can assign other users to this login (Use Primary) and they will share this account - or you can create Secondary logins for those users who have their own logins to Concep.



APPENDIX A – CONFIGURATION FILES

There are 2 files that are used to store configuration & logging data.

concepConfiguration.xml

This stores the configuration settings from Concep2SLXConfiguration.exe. The only setting that should be modified manually is the **LastPollDateTime**. Should the system require “resetting” you can modify this date/time to a prior date/time and the service will then collect from that time onward. All other files should **not** be modified.

```
<?xml version="1.0" encoding="utf-8"?>
<!-- Messenger Settings -->
<PollingInterval>1</PollingInterval>
<LastPollDateTime>2008-09-24T20:12:06.262625+01:00</LastPollDateTime>
<OverLapInMinutes>20</OverLapInMinutes>
<CampaignThreshold>7</CampaignThreshold>
</ConcepConfiguration>
```

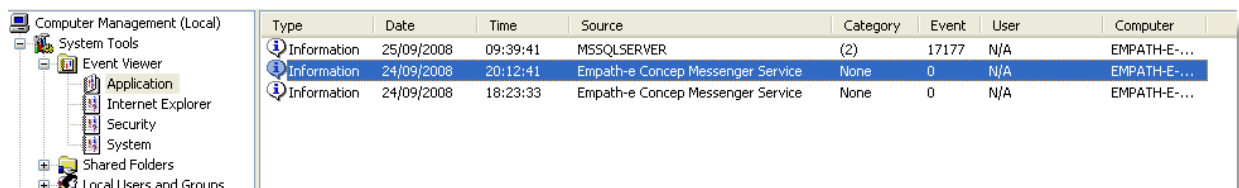
log4net.config

As the service polls and performs its work – it can log details into the Windows Event Log. You can modify how much information is logged by modifying the parameter “Level Value” as indicated.

```
<log4net threshold="ALL">
  <appender name="EventLogAppender" type="log4net.Appender.EventLogAppender">
    <applicationName value="Empath-e.ConcepGlobal" />
    <layout type="log4net.Layout.PatternLayout">
      <conversionPattern value="%date [%thread] %-5level %logger [%property" />
    </layout>
  </appender>

  <root>
    <level value="ALL" />
    <appender-ref ref="EventLogAppender" />
  </root>

  <!-- ERROR, WARN, INFO, DEBUG, ALL, NONE -->
  <logger name="Empath-e.Concep">
    <level value="ERROR" />
  </logger>
</log4net>
```



Type	Date	Time	Source	Category	Event	User	Computer
Information	25/09/2008	09:39:41	MSSQLSERVER	(2)	17177	N/A	EMPATH-E-...
Information	24/09/2008	20:12:41	Empath-e-Concept Messenger Service	None	0	N/A	EMPATH-E-...
Information	24/09/2008	18:23:33	Empath-e-Concept Messenger Service	None	0	N/A	EMPATH-E-...

