Integral Enterprise Viewer™

A member of the

Integral Enterprise Data Access Series™

Sample Solutions

Running Integral Inquiries from Frontstep CRM Views via Buttons

I. Running Integral Inquiries from Frontstep CRM Views via Buttons

Problem: A customer running Frontstep CRM wants to make additional information available to their CRM users, from the current CRM screens. This information is stored in other databases within the enterprise, particularly within the SyteLine ERP system.

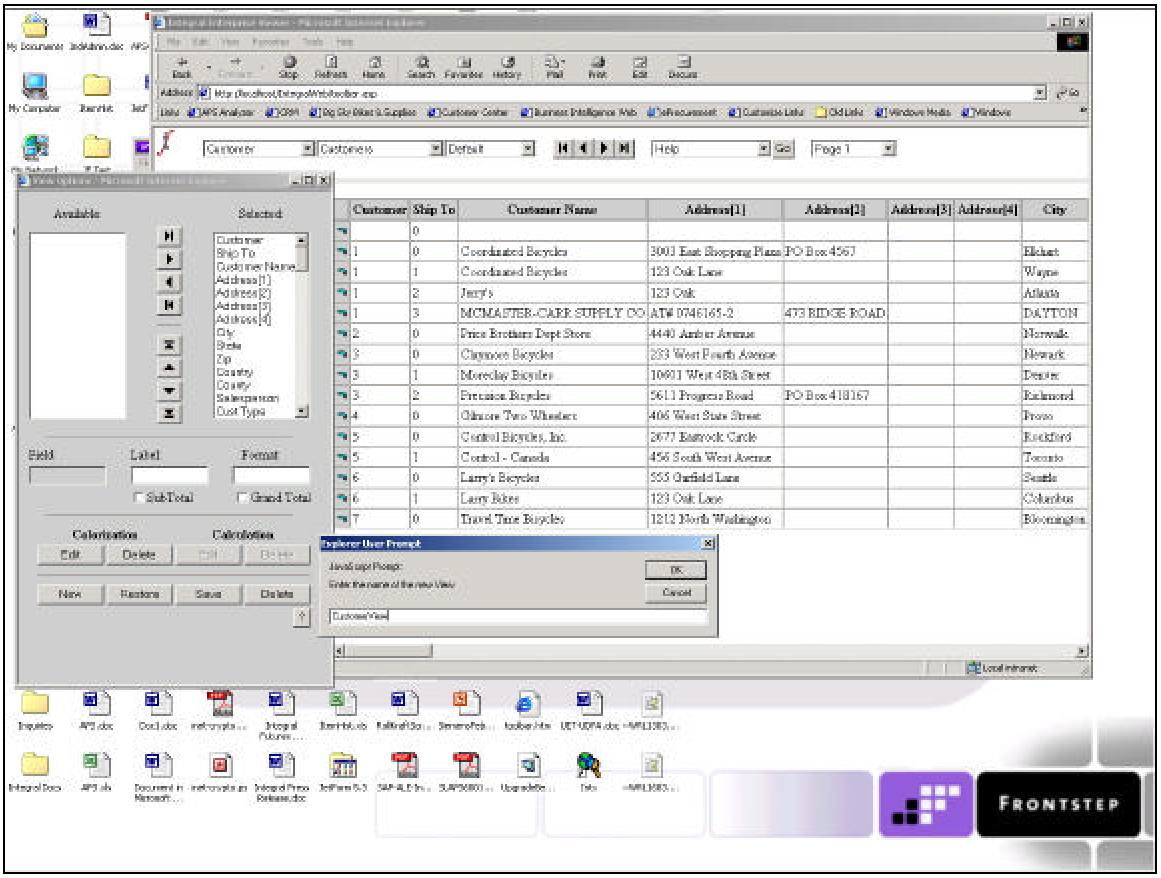
Solution: The user creates Views in Integral for each inquiry they wish to access the data from SyteLine (or other data sources) that they want to make available to their CRM users. They then setup appropriate Integral security to control access to those inquiries. Then invoke the Frontstep CRM View Designer tool to rearrange the fields on a detailed View within CRM, and to add buttons for invoking the Integral inquiries. These buttons invoke ASP scripts which run read the value of certain fields on the CRM View and utilize those values to construct an Integral Web Short-cut, that invokes the appropriate Integral Inquiry, passing to it selection criteria from the invoking CRM Detail View.

The result is an easy and secure ability to expose any data in SyteLine or in other data sources within the Enterprise to CRM users.

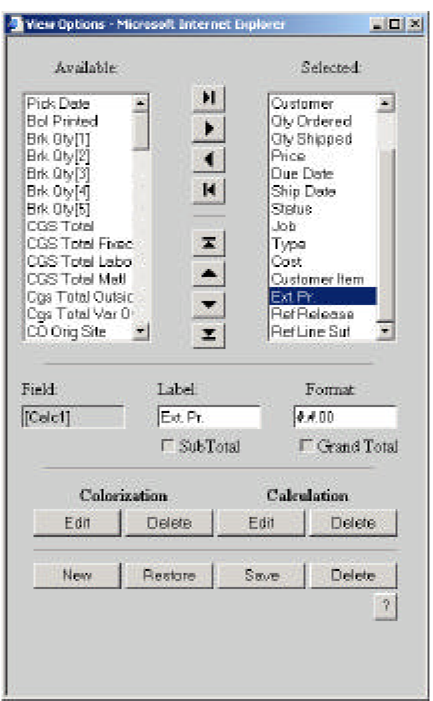
Detailed Screen Shots of the Solution:

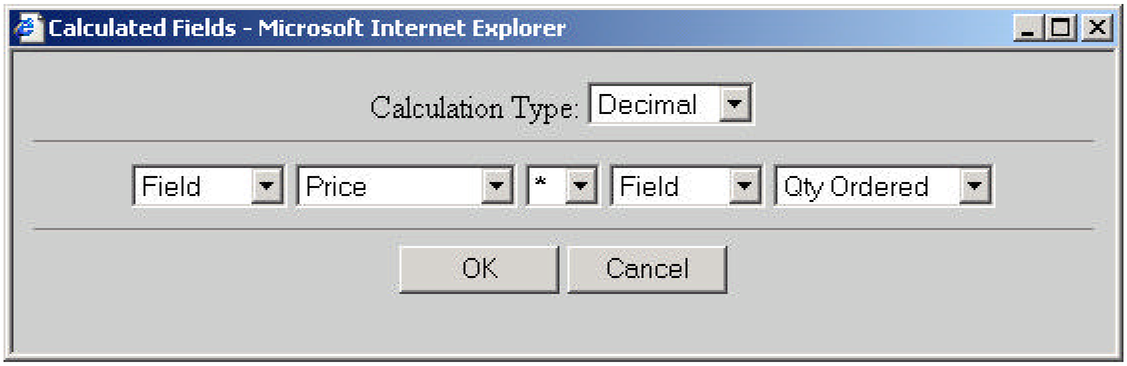
In our example we will provide an ability to run two Inquiries from the Customer Detail View within CRM – one to display all the SyteLine locations for this customer, and the other to show all the Customer Order Line Items ordered by this customer. To link Customer records in CRM to Customer/location records in SyteLine, we are relying on the "Enterprise ID" field within each CRM customer master, and which is designed to hold the SyteLine Customer number, followed by a "-", followed by the location number for the corresponding customer/location record in SyteLine. Once the Integral inquiries are invoked, you are able either to return to CRM via the green CRM back-button, or to drill-down further to additional linked Integral Inquiries.

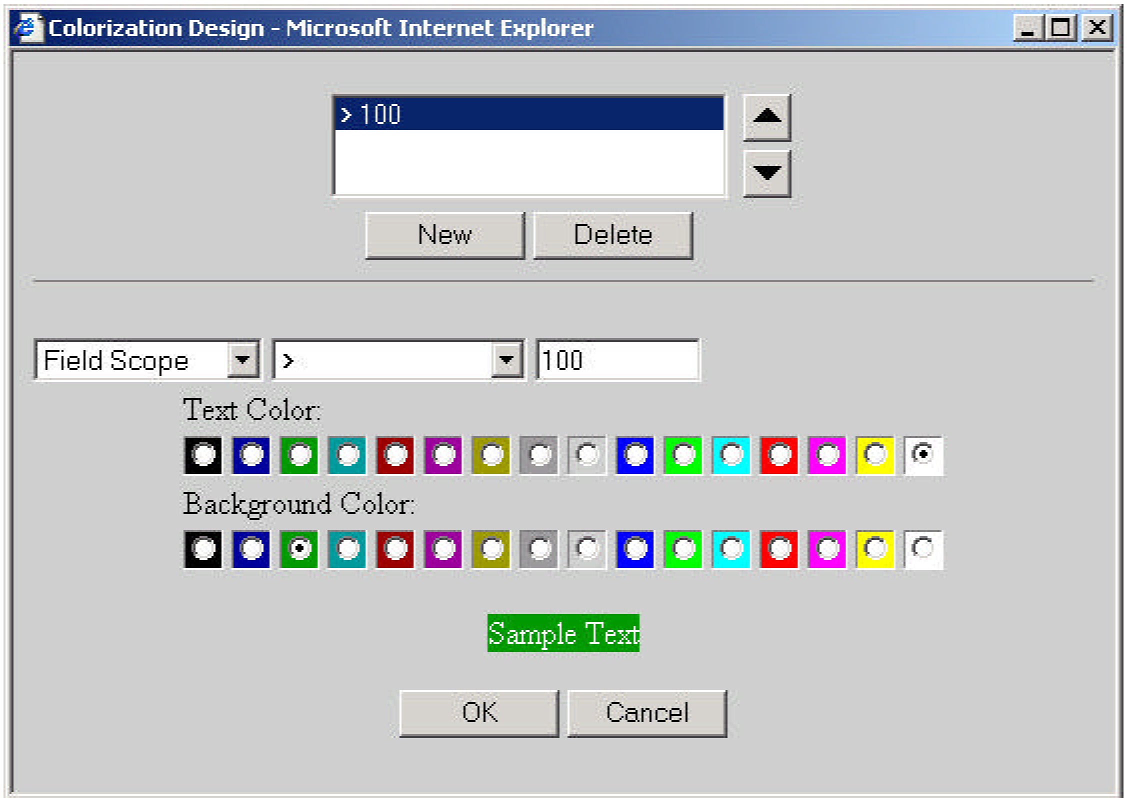
a. First call up the Integral Web Client. Select the "Customers" Inquiry from the "Customer" Inquiry Group. From the "Options" drop-down, select "View Options" and click the "New" button on the 'View Options" browser window. This brings up a dialog box, in which you fill in the name of the new inquiry, which we will name "CustomerView." We will leave this custom view identical to the default Customers View:



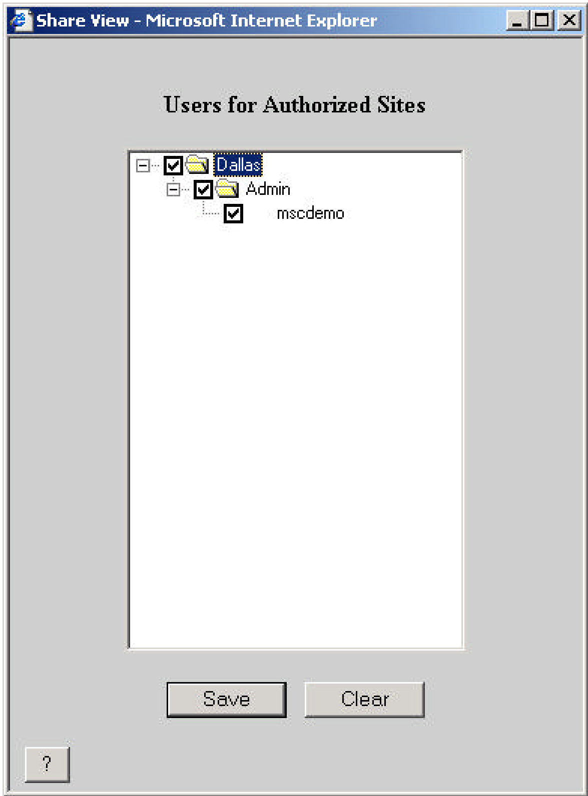
Similarly, we create a “CustomerItemsView” View from the “Order Items” Inquiry. In this case we selected certain fields to appear, add and rename a calculated field (extended price), and add a color rule for that field.



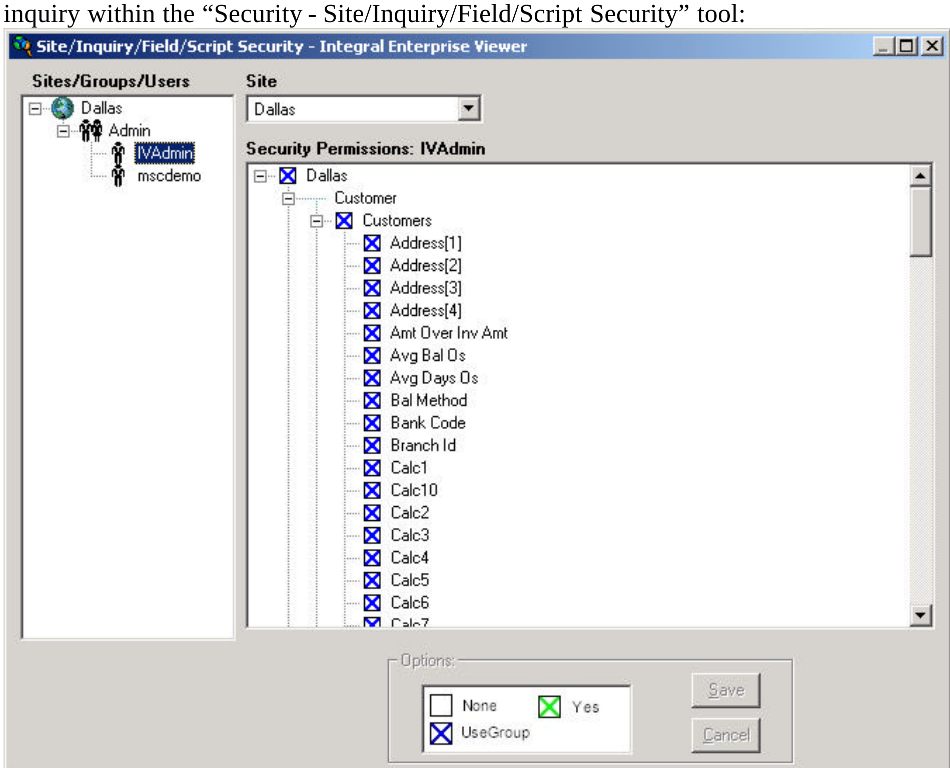




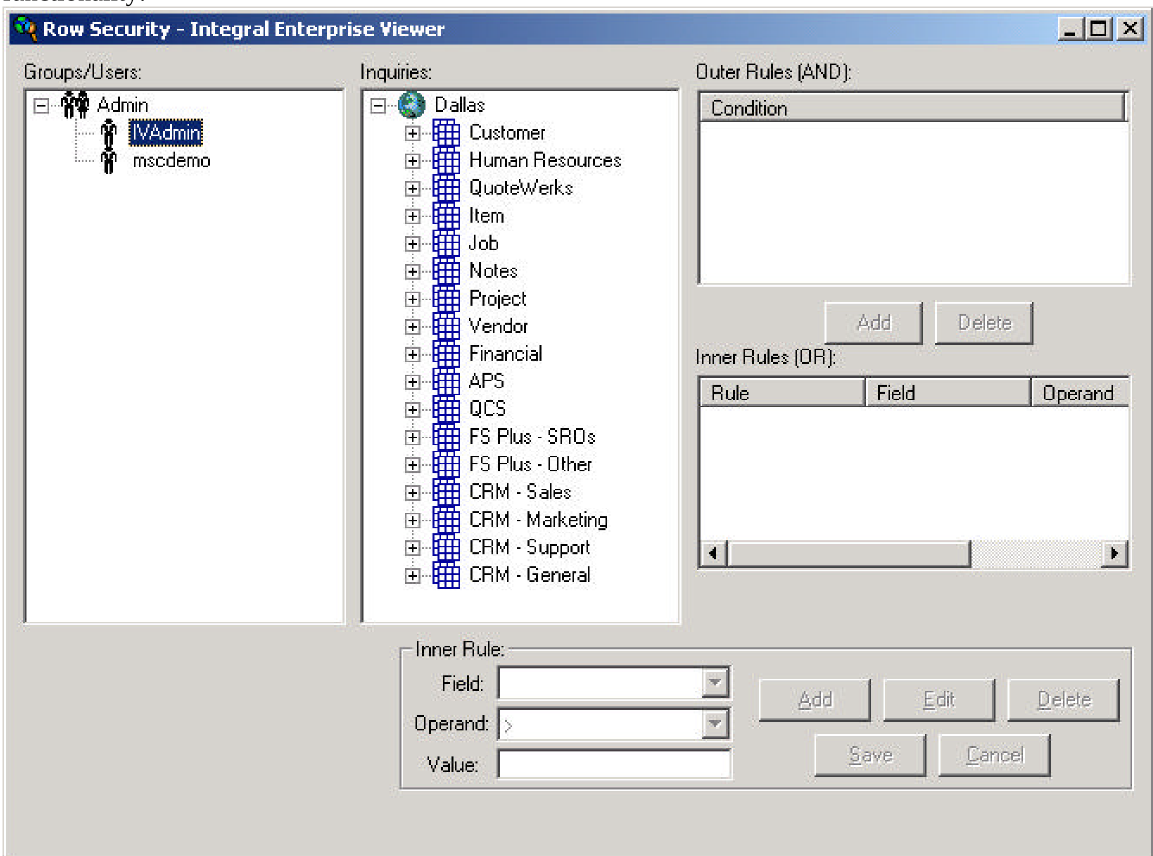
Note – new views, like those created above begin by being accessible only to the Integral user who created them. Integral includes a capability that allows a user who creates a new view, like the two above, to share them with other users, so they can use the same custom Views. This is accomplished by selecting “Share View” from the Options Drop-down. Select the names of other users at your site, with whom you want to share the view(s) you just created.



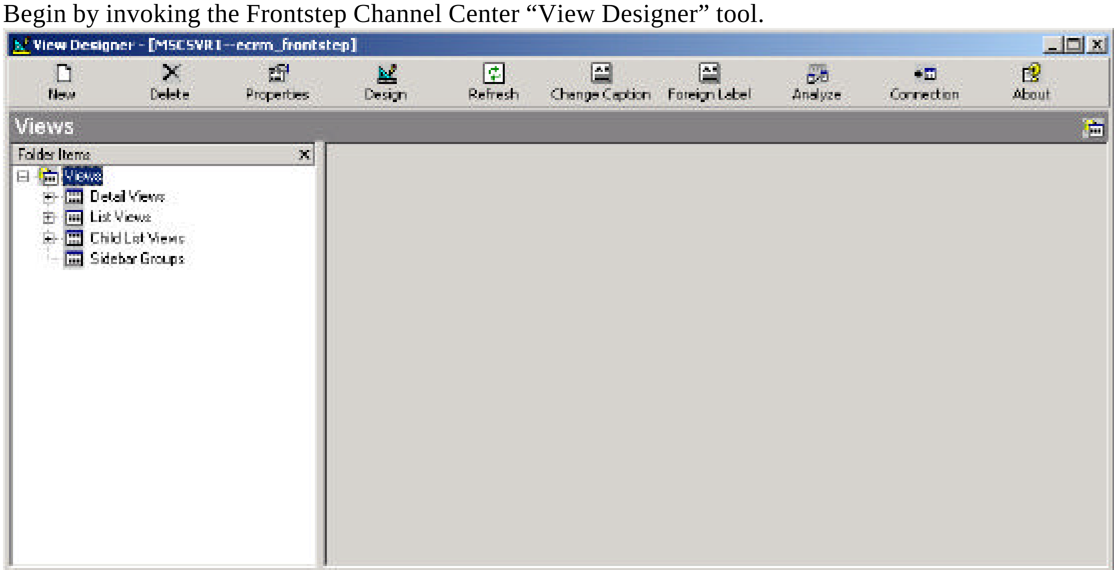
b. Next we call up the Integral Administrator Tool. We just created new Views for existing inquiries, so these views will receive whatever settings had already been applied to the “Customers” and “Order Items” inquiry within the “Security - Site/Inquiry/Field/Script Security” tool:



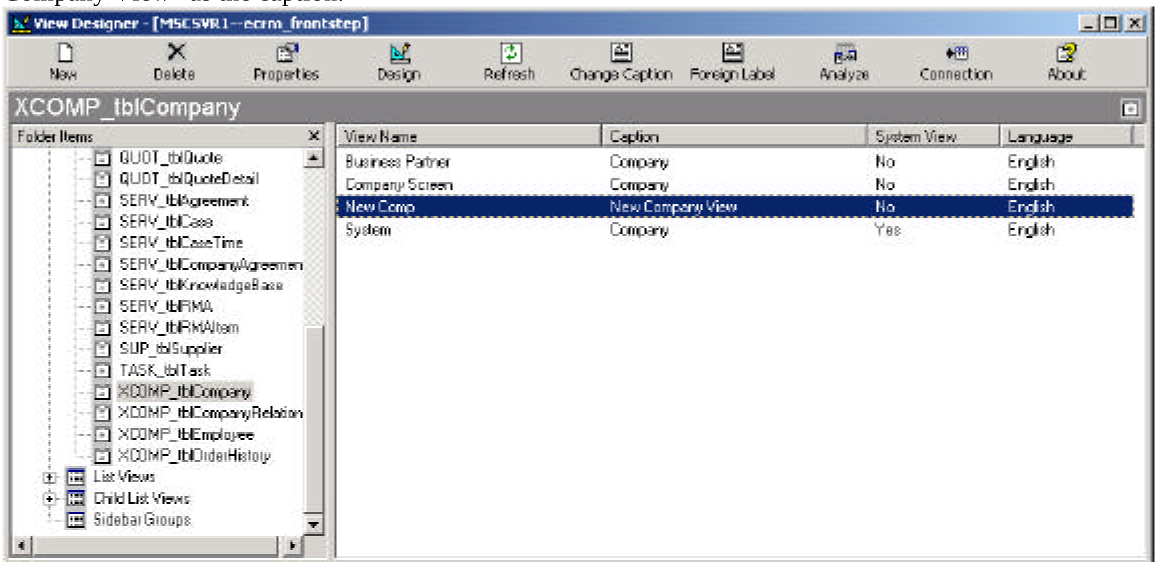
If you provide controlled access to your CRM system either to your customers or to outside selling and business partners, who should be provided access to some, but not all data in SyteLine, then you should utilize the "Row Security" capabilities of Integral to what information within each row is accessible to which Integral User/Group (this tool is obtained from the Administrator menu as "Security – Row Security). Consult the Integral Administrator Help File for details and examples of setting up this functionality:



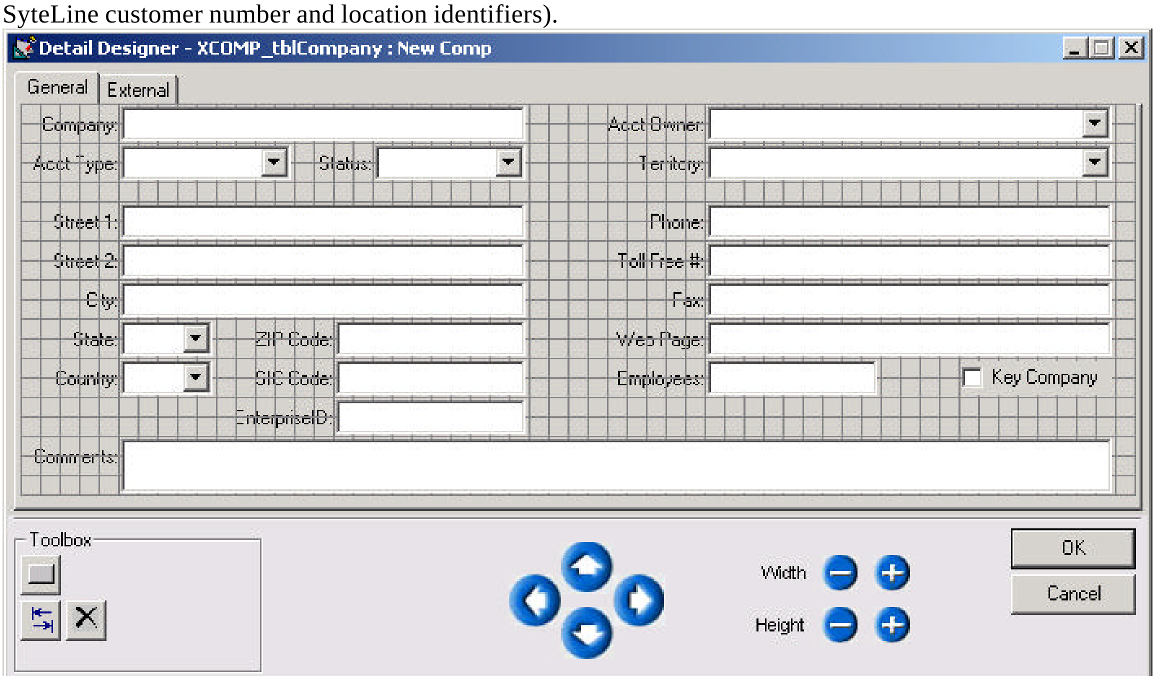
c. Now we will set up Frontstep CRM Views with buttons that will provide access to these Integral Inquiries. The examples below are implemented upon the 5.0 releaser of Frontstep CRM (Channel Center). Begin by invoking the Frontstep Channel Center "View Designer" tool.



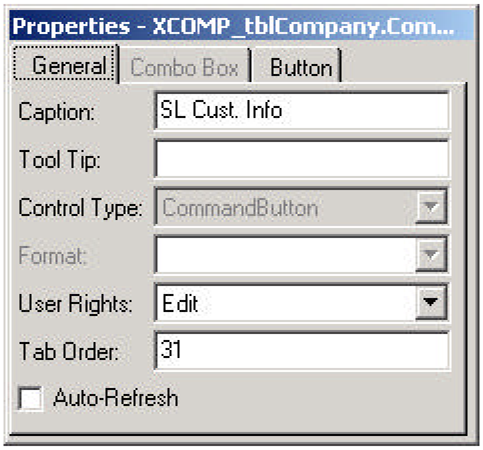
In this case, open up the “Detail Views” group, and find the “XCOMP_tblCompany” View. This is the Company detail view, from within the CRM “Sales” group. We will create a new version of this View by selecting the “New” button at the top of the View Designer Window, answer “Detail” to the choice on our first screen, and selecting the “XCOMP_tblCompany” Table Name and the existing “System” View as our template for creating our new View. I selected “New Comp” as the name of our new view and “New Company View” as the caption.

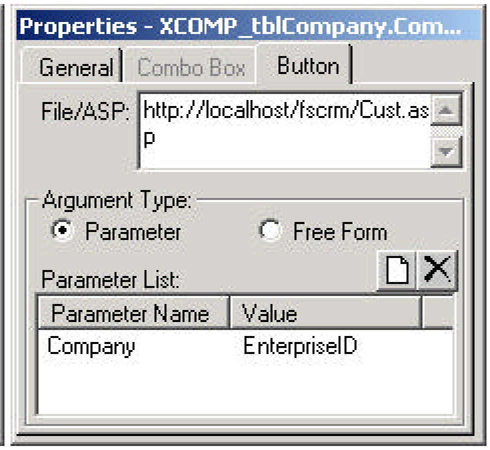


Now right click the “New Comp” view we just created, and select “Design” to edit the design of this new View. I started my editing my moving “EnterpriseID” from the “External” tab to the General tab, so its value will be available for the ASP script we will write for invoking Integral (rememberthis field holds the SyteLine customer number and location identifiers).

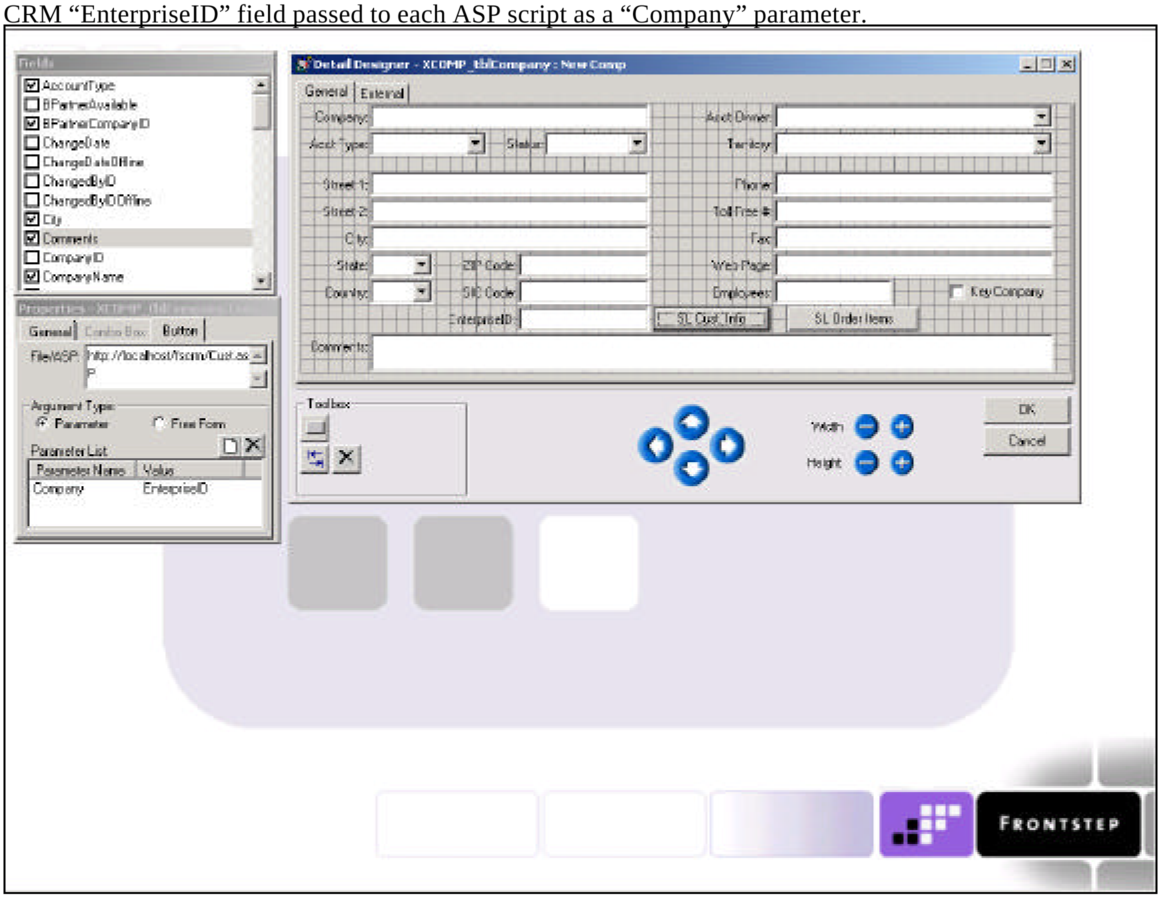


Next, I drop 2 buttons on the View (by clicking the “Button” option within the Toolbox). I drop these buttons right next to the “EnterpriseID” field. With the “Properties” window I set the buttons’ Captions (to “SL Cust. Info” and “SL Order Items.” I also set the buttons to invoke ASP’s Cust.asp and Custitems.asp, and pass each ASP pages one parameter that I named ‘Company” with value “EnterpriseID.”





The net effect of these changes is to invoke separate ASP scripts for each button, with the value in the CRM "EnterpriseID" field passed to each ASP script as a "Company" parameter.



d. Now we will write our two ASP scripts, which will be called from our CRM buttons. In each case, the function of the script will be to parse the "Customer" segment out of the "EnterpriseID" parameter (stripping off any "-location #" part), and to invoke an Integral View, with that company value filled in as a Selection Criterion. Here are two scripts we wrote to do this:

Cust.asp:

```
<%
  vv1 = Request.QueryString("Company")
  vint = instr(vv1, "-")
  if (vint <> 0) then vv1 = mid(vv1, 1, vint - 1)
  vv1 = trim(vv1)
  var1 =
"//localhost/IntegralWeb/toolbar.asp?ViewName=CustomerView&ObjectName=Customer,
"
  Response.Redirect var1 & vv1
%>
```

CustItems.asp:

```
<%
  vv1 = Request.QueryString("Company")
  vint = instr(vv1, "-")
  if (vint <> 0) then vv1 = mid(vv1, 1, vint - 1)
  vv1 = trim(vv1)
  var1 =
"//localhost/IntegralWeb/toolbar.asp?ViewName=CustItemsView&ObjectName=Customer
,"
  Response.Redirect var1 & vv1
%>
```

Notes:
1) vv1 = Request.QueryString("Company") – This line assigns the value of the Company parameter from CRM (whose value the CRM button assigned based upon the contents of the CRM EnterpriseID field) to the variable vv1.
2) We then reset vv1 to be just the portion of Enterprise ID that comes before the "-" symbol. This leads, then, for us to list all locations for the Master customer number in the "cust.asp" inquiry, and all items sold to all locations for that customer in the "CustItems.asp" inquiry.
3) var1 = "//localhost/IntegralWeb/toolbar.asp?ViewName=CustItemsView&ObjectName=Customer," – This code sets var1 equal to a Web Shortcut that invokes a named View (CustomerView or CustItemsView) and gets ready to set the Customer Schema object (see next line of code).
4) Response.Redirect var1 & vv1 – This causes our ASP script to cause the browser invoke the Web Shortcut prepared above, with the value "vv1" added to the end (which equals the value we will fill in to the "Customer" Schema Object in Integral.

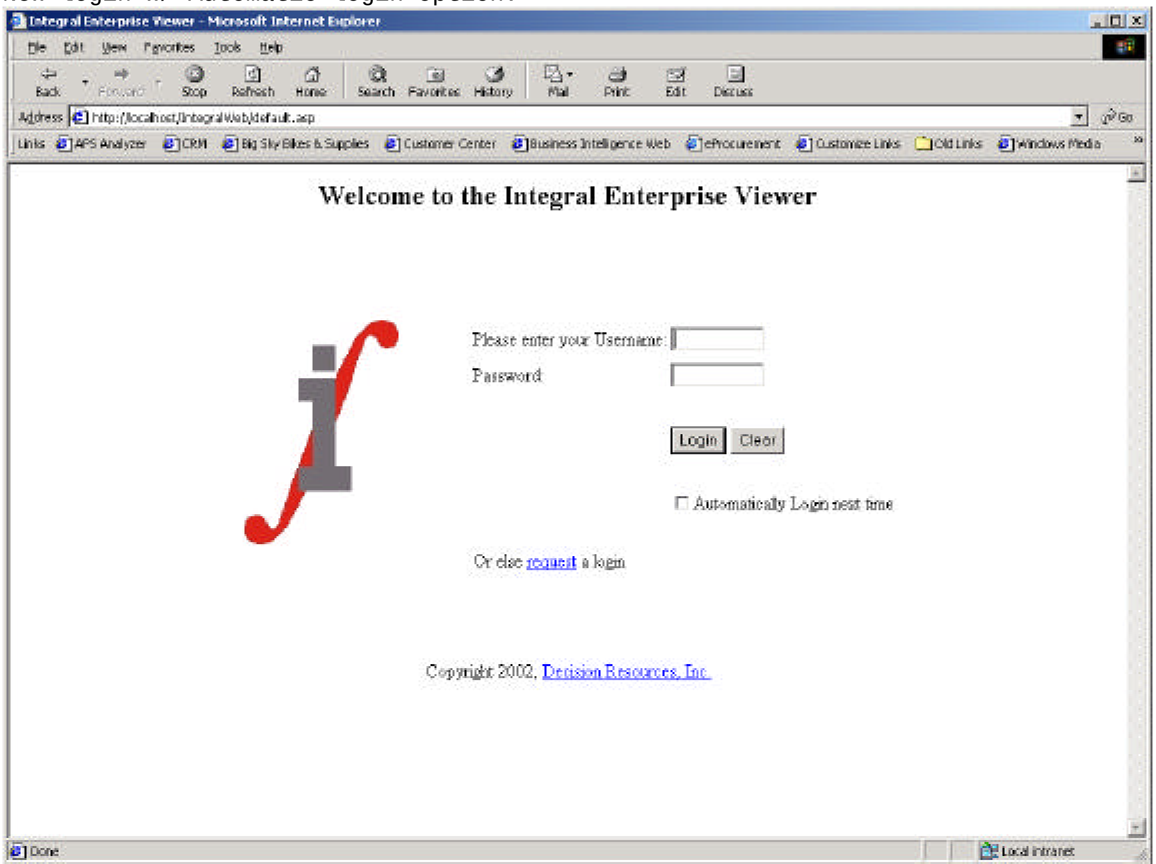
e. Sign-on security. Access to data within Integral is controlled by the User name you use when you sign in. All access to Integral can only be made by authenticated users. On the other hand, needing to go through a sign-in process each time a CRM-lookup is performed might be unduly burdensome upon your users. Several options are available here:

i) You can require users to authenticate themselves each time the invoke Integral. This offers the greatest security, but may be overly burdensome for some situations.

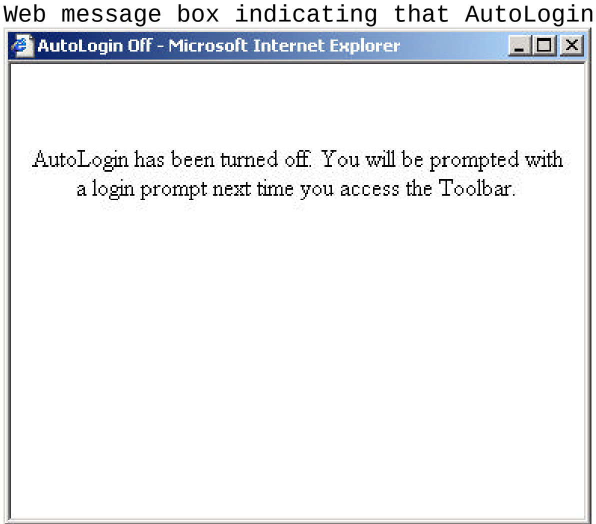
ii) You can add "&IVusername=UserName&IVpassword=UserPassword" parameters to the Integral Web Shortcut we invoke (Where UserName/UserPassword are a valid Integral login pair). This approach provides automatic authentication, but it may not be appropriate for all situations, since the Username/Passwords may be exposed in places where you would not like them to be shown.

iii) When the Integral Web login first appears, there is an "Automatically Login next time" checkbox on the browser screen. Checking this will cause an encrypted Username Password combination to be stored on the user's computer, which will allow the sign-on screen to be bypassed in subsequent invocations of Integral from that computer. Users can select "Turn Off AutoLogin" from the Options Drop-down to turn this feature off on a PC.

New login w/ Automatic login option:

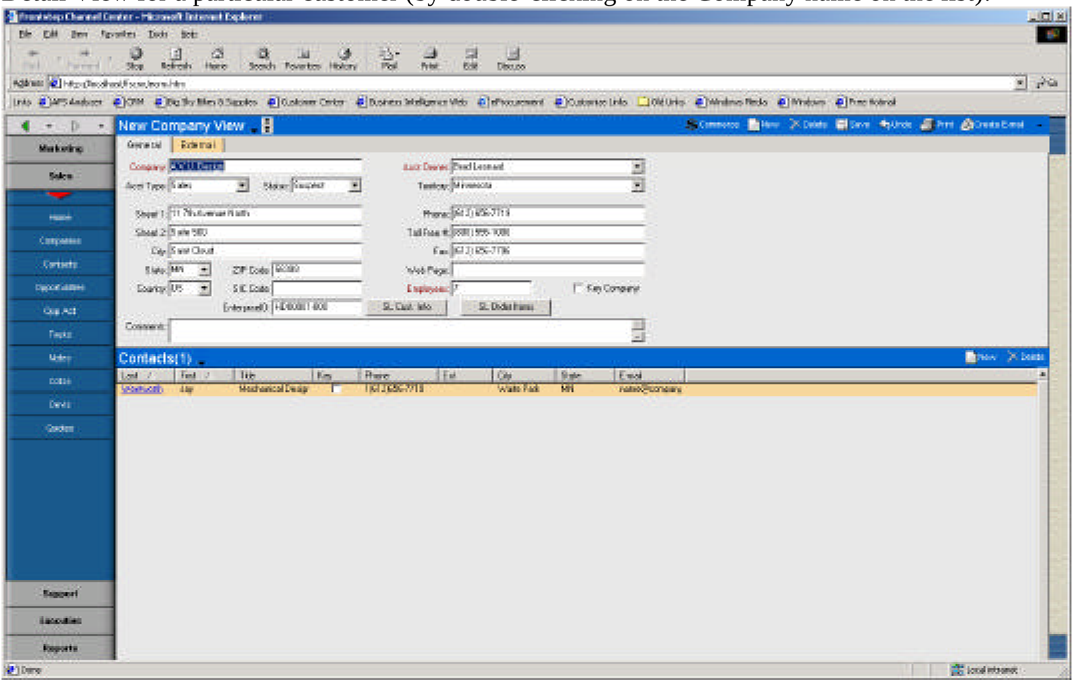


Web message box indicating that AutoLogin has been turned off.

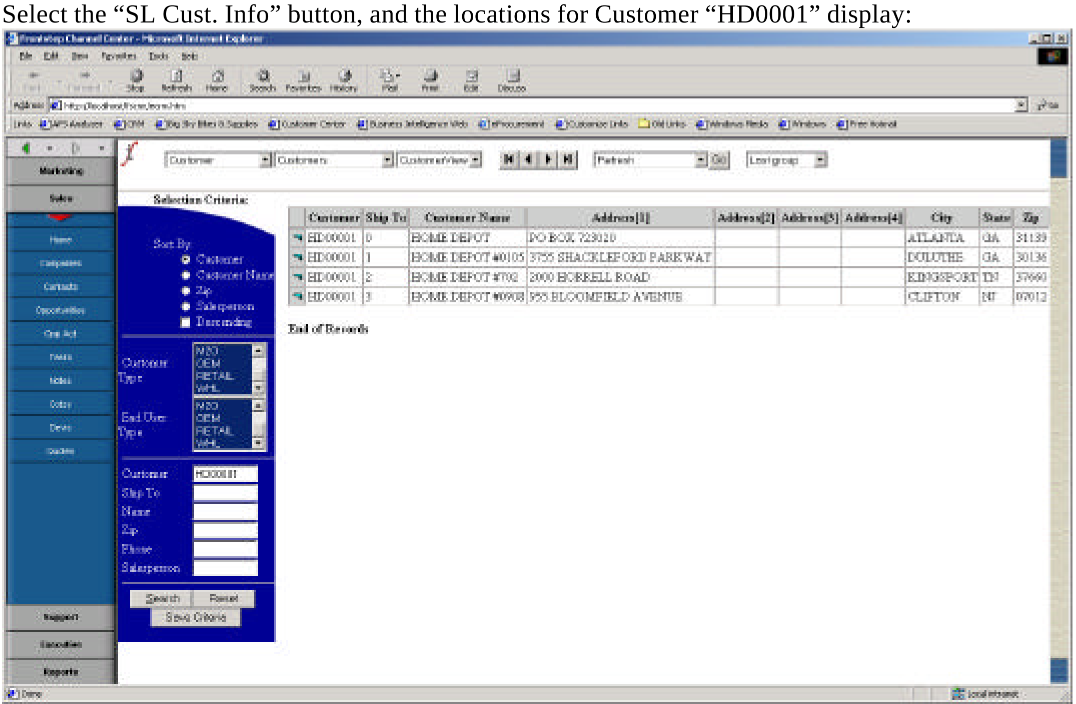


f. In addition to the CRM View design changes describe above, you may want to make additional security/configuration adjustments to your CRM setup in terms of setting up the Groups properties in the new View you just created, and by using the Data Manager tool to set your user's groups (and which group is their default), and to enable the new view to appropriate groups (or even to make it the default view for such groups). The issues involved in setting those items up is covered in Frontstep's CRM documentation, and is not duplicated in this document. For the examples below, we have setup a user to receives our customized "Customer" view as his default Detail View for the XCOMP_tblCustomer table.

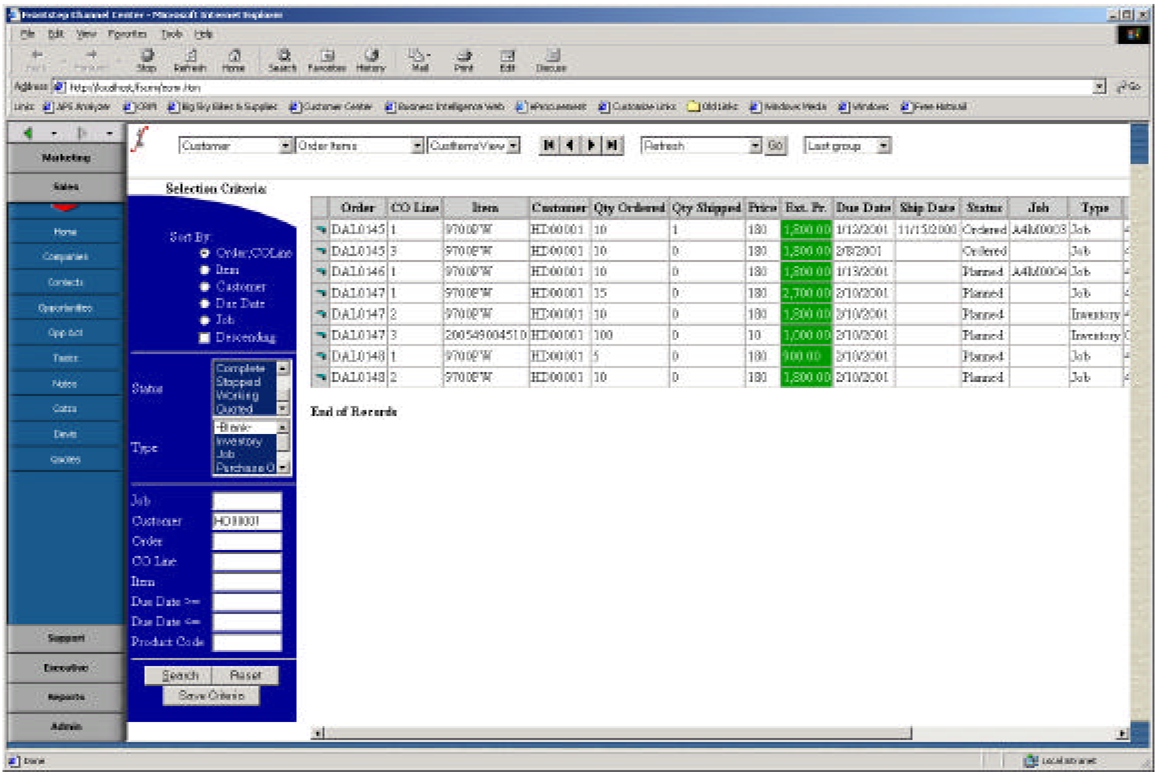
We sign into CRM, go to the Sales sidebar group, select the Companies List from there, and call up the Detail View for a particular customer (by double-clicking on the Company name on the list):



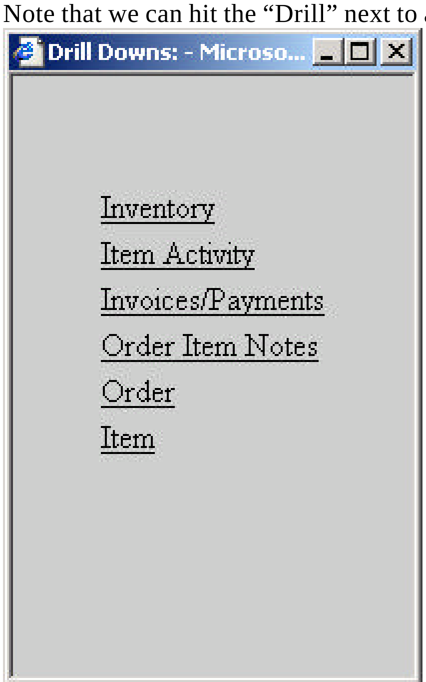
Select the "SL Cust. Info" button, and the locations for Customer "HD0001" display:



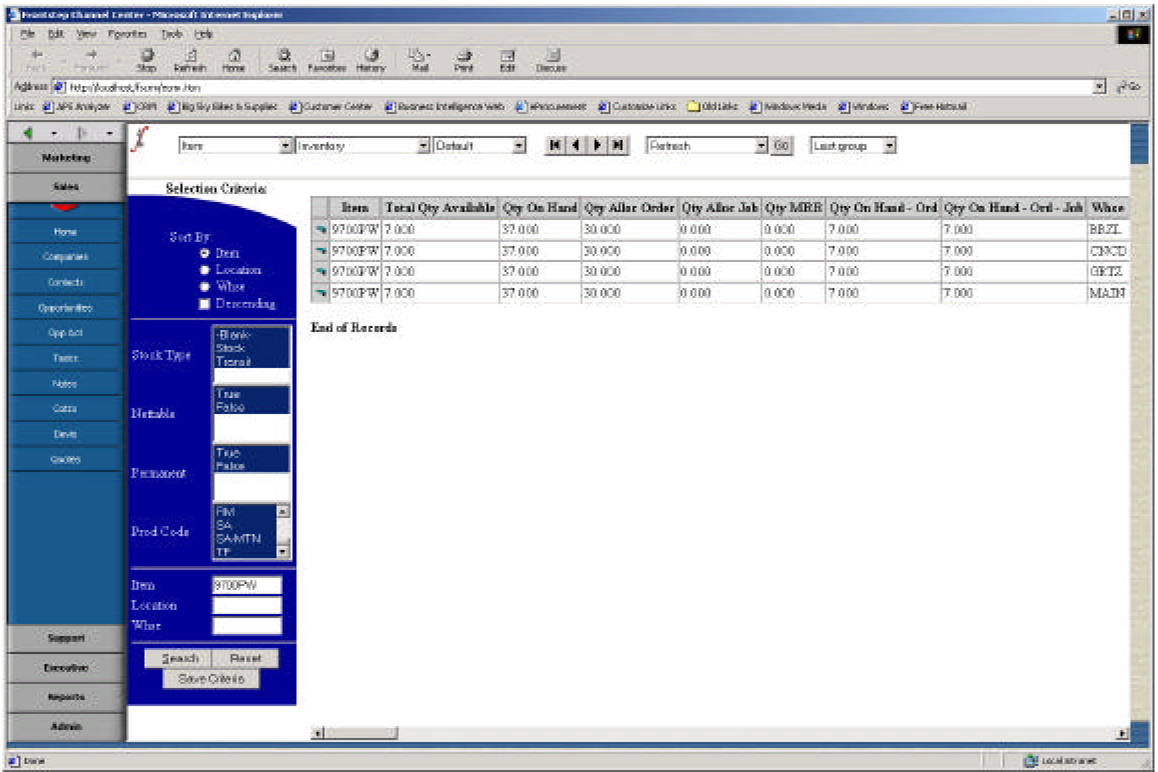
Hit the green CRM back-button, and we are back in CRM , at the same customer. Now hit the “SL Order Items” button:



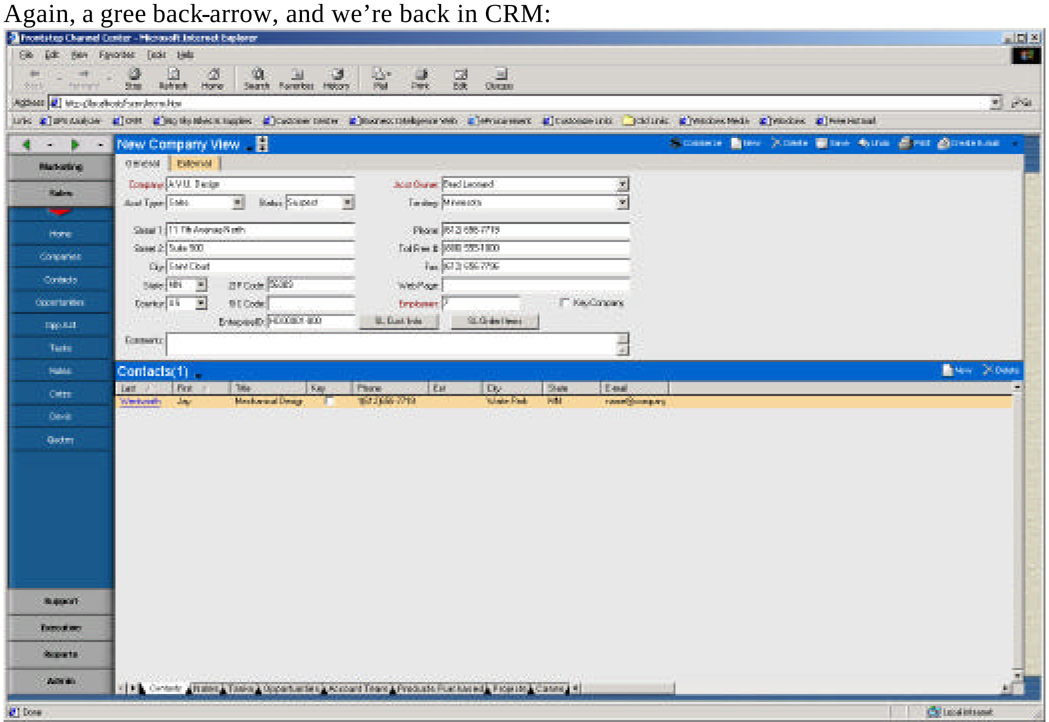
Note that we can hit the “Drill” next to any line to drill-down further within Integral:



Select “Inventory” and see:



Again, a gree back-arrow, and we're back in CRM:



These techniques are very versatile. Essentially any Integral Inquiry – based upon data in SyteLine or in other databases at a customer site can be made accessible to any CRM screen through this approach. Once again, the result with Integral is Information, at your fingertips!!