

PRODUCT INFORMATION

CCM

Enhancements for Version 8.5

2nd updated version

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Contents

1	Introduction	2
2	Business Partner Management	3
2.1	Entry option for the external reference number (121734)	3
2.2	Status icon for all business partners (107033)	3
2.3	Standard address number (SAN) check (121045)	3
3	Reports – Document Printing	4
3.1	EAN128 barcode (120738)	4
4	Multi-Component Batch Procedures	5
4.1	PPD Export file from DB view (FILE_EXP) (122578)	5
5	Transaction Management	6
5.1	Import transactions / interface (112848).....	6
5.1.1	Standard interface for transaction import	6
5.1.2	"WFL Import transactions from standard interface (WFL_IMP)" batch procedure.....	7
5.2	External reference number for transactions (112848).....	7
6	Monitor	8
6.1	General batch settings (122363)	8

1 Introduction

This document describes the new features in version 8.5 of the Customer Care Management System (CCM).

All enhancements described in this upgrade manual are available free of charge to CCM customers as stipulated in the update terms of the service agreement.

Please note:

- Version 8.5 of the Klopotek applications has been released exclusively for **Oracle10g™**. For further information, please see the EN_WP_CS_Oracle_10g_settings.pdf whitepaper.
- You may use either **FUZZY! Post™ V5.4** or FUZZY! Post™ V3.9 for version 8.5. You can set the data types to determine which FUZZY! Post™ should be used.
- **FUZZY! Double® 2.x** will also be switched to the current version 5.4, because FUZZY!™ version 2.x is no longer maintained. You can set the FUZZY! Double® version that you will be using in the data types.

2 Business Partner Management

2.1 Entry option for the external reference number¹ (121734)

Starting in version 8.3, you can enter 255 characters in the "Reference No." box in the search results and on the "Business Partner" record (right mouse button, "External Reference No." option).

2.2 Status icon for all business partners (107033)

If the address status is **not** 'Active', the stop sign icon is displayed for business partners (business partner, customer, publicity contact, etc). Starting in version 8.5, different icons can be used to display the various reasons for deactivation (undeliverable, left company etc.) in the business partner window. The customer can assign specific icons based on his/her individual needs. If you have entered this type of icon in the data types, it replaces the stop sign displayed until now.

Important! The icons have to be bitmaps (*.bmp) and stored in the directory for executable application programs or in the system path.

2.3 Standard address number (SAN) check (121045)

The Klopotek system uses SAN in the EOR standard BISAC procedure for the correct identification of the customer and transfers the SAN during the EDI export.

The twelve digit SAN check has been changed. It is now carried out according to the rule described in the "ANSI/NISO Z39.43-1993 Norm" document (NISO= National Information Standards Organization). However, no check is carried out to see if the SAN is unique.

You can also create a setting to have invalid SANs saved too. You will be notified that the SAN is invalid, but can still choose to save it. In this case the SAN will not be checked again by the " IAP Import address pool" (IAP_IMP).

¹ This enhancement is already part of version 8.3.

3 Reports – Document Printing

3.1 EAN128 barcode² (120738)

The basic software needed for barcode printing has been incorporated into the standard (barcode font and the barcode DLLs) to ensure that the Barcode128 is printed on DocPrn and PowerBuilder documents.

Included with delivery are barcode fonts, a Windows DLL file for the barcode printing and database options (is installed with DUE).

² This enhancement is already part of version 8.0.

4 Multi-Component Batch Procedures

4.1 PPD Export file from DB view (FILE_EXP)³ (122578)

Starting in version 8.3, you can add a consecutive counter (consecutive during one batch run, each batch starts again with 1) to the file names generated by the "PPD Export file from DB view (FILE_EXP)" batch procedure, for example inv_afile..._000001.txt. This option is activated in the data types. All batch procedures that export files based on the execution of the FILE_EXP batch procedure can use this option.

Note: This version contains an additional log message containing the number of files generated.

³ This enhancement is already part of version 8.3.

5 Transaction Management

5.1 Import transactions / interface (112848)

Klopotek WFL Transaction Management is ideal for supporting all of your business processes, starting from customer acquisition and qualification to customer support, complaint management and call center activities. It enables you to manage business partner contacts (transactions) outside the sales component, including notes, letters and documents, additional information as well as linked objects referring to other Klopotek components.

At present, you can directly generate transactions from within the Klopotek user interface using the following key options:

- create individual transactions for an object
- create collective transactions based on transaction samples from within the marketing component.

It is now also possible for the Klopotek system to be used as the central interface between your subsystems with their specific tasks and the resulting data flows. The new standard "WFL Import transactions from standard interface (WFL_IMP)" batch procedure enables you to actively map system wide business processes. The batch procedure automatically creates transactions in the Klopotek system using a standard interface.

There are some cross-system business processes that cannot automatically be carried out via the respective import interface. A manual check must be carried out and, if necessary, action taken to complete the entire business process. You explicitly have to define transactions and thus procedures for the standard import batch procedure that support both the check and the action. In addition, an option for manual bugfixing can be provided in the Klopotek user interface by creating "Bugfixing transactions (Exception Transaction Type)".

5.1.1 Standard interface for transaction import

The new standard "WFL Import transactions from standard interface (WFL_IMP)" import batch procedure enables you to import transactions into the Klopotek system using the standard interface. For a transaction ,you can now import

- notes,
- letters and documents
- linked objects for other Klopotek components

To manually check or further process imported transactions, you can make reminder entries during the import.

Note: Transaction additions and profile information ("Profile" record) are not available for import.

5.1.2 "WFL Import transactions from standard interface (WFL_IMP)" batch procedure

The "WFL Import transactions from standard interface (WFL_IMP) " batch procedure imports transaction data from the standard interface into the internal database tables for transaction management (WFL). You have to define the transaction types to be created in advance and store them in the Klopotek system using the administration tools.

- The batch procedure processes the data from the standard interface in one step. You can predefine a maximum number of data items (

5.1.2.1 Supported linked object types

The batch procedure processes the following linked object types:

- JOP - JSD Order unit
- CTMJ - Customer (JSD)
- CTMB - Customer (BSD)
- AP - Business partner

5.1.2.2 Manual bugfixing supported by ETT transactions

If an import error occurs, you can create so-called "ETT transactions" as alternative transactions, if required. "ETT" means "Exception Transaction Type". This transaction type provides support for manual bugfixing in the Klopotek system. You have to define this specific transaction type in advance using the administration tools (without linked objects). This transaction type can be specified when creating an interface item..

If the import transactions batch procedure fails for this interface item, it creates the specified ETT transaction instead and generates a reminder entry for a user, if required. The reminder entry contains the error text and a URL reference, if necessary. It is now possible for the user to manually correct these erroneous interface items in the user interface and create the correct transaction.

5.2 External reference number for transactions (112848)

You can store an alphanumeric external reference number for a transaction. It is possible to directly assign this number during transaction import. The box for entering and maintaining the external reference number is available for every transaction in the user interface ("Transaction" record). You can search for transactions using the external reference number.

6 Monitor

6.1 General batch settings⁴ (122363)

Using a system setting, you can define whether the database time is to be used for the batch start. This is important if the batch is installed on a server in a different time zone than the database.

⁴ This enhancement is already part of 8.3.