Project 1: Add a new filter to advanced customer search for additional contacts.

1. Open up page called “advanced\_customer\_search.cfm”. Please use handrail of “additional\_notes”. You will need to add a new param called “additional\_email”.
2. In the body page, “advanced\_customer\_search\_body.cfm” you need to add a new filter above the additional notes filter. Call it a title of “Email” and a form field name of “additional\_email”.

Once A & B are completed, this should be the first page of the project.

1. Next go to the file called “advanced\_customer\_search\_results.cfm”. You will need to add a page param at the top for “additional\_email”. Once again, use the handrail “additional\_notes”.
2. Plug the filter into the proper CFC method call. There is a lot of stuff ahead of this. The actual one you need to modify is called “searchAdditionalContacts”.
3. In order to code the new CFC, you will need to go out to “search\_13.cfc”. Search for “searchAdditionalContacts “. As a note, this method changes the value “additional\_notes” and calls it “arguments.notes”. You will end up plugging in a similar type SQL filter for the email filter.
4. In order to get the rest of the pieces done, you need to go to the body page. “advanced\_customer\_search\_results\_body.cfm”. Search for the word “additional\_notes” and use as a handrail for anything that may have pagination. The value that you are plugging in is still the “additional\_email” form value.

Project 2: Still dealing with emails, but a new report format. This new report would show all primary email addresses and all additional contact email addresses all on the same page. Note: We need to be able to search the database based off of whether they have a primary email address or whether they have additional contact email addresses. Want to pull all customer email addresses whether they are real or sub.

1. Add a new link to the report. The main page is called “top\_secret/secure/classic/advanced\_customer\_search\_body.cfm”. The new link will be under the more options button. This new link will be most likely be in column one or column two in the bottom row. The link title should be “Show All Email Addresses”. The new link will need to point to a new page. The new page will end up being stored in top\_secret/secure and should be called “show\_all\_customer\_emails.cfm”. This will end up being the new report.
2. On the new report page, we need to make sure that it can show basic information. This will be a brand new page. Every record should have a name, (either biz or first name, or last) a customer id, a primary email address, and a column that shows any possible secondary email addresses (aka additional customer contacts).
3. As part of the report go ahead and add a drill down list from the customer id to their customer log.
4. Please make sure that any verbiage that says customer actually refers back to the naming convention in corp-wide settings, as “customer” is a dynamic field and is different in most corps.
5. At the top of the page, add some buttons that take them back to the customer homepage, customer advanced search pages. Please remember that “customer” is dynamic.
6. Sub process 1)

Query one: Search all customer ids and emails from “additional\_customers”. Make sure to filter by corporation and that there is something in the email field. Recommend a length function. Sample: “AND LENGTH(email) > 0”.

Sort this query by the customer id number.

Query two: If positive record count, need to group query one so that we can get the customer ids numbers. If we have a valid record count, we need to load those into a list. If this list exists, it will wind up being filtered in the next query.

Sub process 2)

Select customer id, biz name, first name, last name, primary email from the main customers table where we match corps.

This next section is a bit tricky and will depend on whether we have a valid list or not. This might require some “if” statements. We need to build an and clause that is actually a complex or clause. The parentheses are very important. Example: “AND (customer\_id IN (list) OR LENGTH(email) > 0)” The less complicated scenario might look something like this: “AND LENGTH(email) > 0”. Make sure you put an if statement checking if we have the list or not.

Sub process 3)

For the output, loop over the main customer records. Populate all of their info. Customer id, biz name, first name, last name, primary email, additional email/s. See sub process 4 for additional emails.

Sub process 4)

Dealing with the last column. Need to do a query of a query to see if there are any additional emails and fill them in. If there are multiples they need to have a break tag which will virtually stack them.

1. Here’s a scenario of some data. Say we have three customers. Tom, Fred, Sally.

Tom has a primary email and three sub emails.

Fred just has a primary email- no sub emails.

Sally does not have a primary email and she has 2 sub emails.

We should be able to pull in all of these records if we do everything right. If there is anyone who does not a primary email or any sub emails, they should not be included in the report.