

Ebase “Add Contact” Comments

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Purpose

This document offers some key comments about the approach used to add records to the Contacts database in ebase V2.0.3.

Details

This document was created in conjunction with a flowchart of the “add contact” process, and might be most useful when used in conjunction with that flowchart.

Names of database objects (FileMaker databases, value lists, scripts, fields, layouts, relationships) are provided in bold text.

Subsections below are arranged in order of the appearance/use of these objects during the “add contact” process.

“Addr-IndivStep1ClearGlobals&SetUp” Script

This script:

- Clears the values of name-related global fields in the Contacts database (**_gNameSuffix**, **_gNameFirst**, ... **_gNameNickname**).
- Sets the value of the **Locations** database global field **_gkContactID** to “”.
- Sets the value of the **ContactLocations** database field **_gCountry** to either the value of the “registered country” field or to “USA”
- Locates the cursor in the **Contacts** database **_gNamePrefix** field

“EnterContact” Layout

Allows user to enter “name” information identifying a “contact” into appropriate global fields in the **Contacts** database (**_gNameSuffix**, **_gNameFirst**, ... **_gNameNickname**).

The “possible duplicates” portal displays existing contact records (*not* marked for deletion) that have values of “first name” and “last name” that match the values of **_gNameFirst** and **_gNameLast** entered by the user.

If the user selects a record displayed in the “possible duplicates” portal, they are taken to the **Contacts** database **Overview** layout with the record for that contact displayed.

“Addr-IndivStep2AddContactRecord” Script

This script:

- Creates a new record in the **Contacts** database

- Sets the values of “names” fields in the new record using the values of the **Contacts** database global fields set by the user in the “EnterContact” layout (**_gNameSuffix**, **_gNameFirst**, ... **_gNameNickname**).
- Sets the value of **ContactLocations** global field **_gCountry** to either the “registered country” or “USA”
- Sets the value of **Navigator** database global fields **_gContactID**, **_gMakePCL** (“yes”).
- Sets the value of the **Contacts** database field **ContactRecordType** to the value of **Contacts** database global field **_gRecordType** which was set by the user’s response to a message window early in the “Add Contact” process.
- Sets the value of the **Contacts** database **ContactName** field based on a calculation that differs according to record type. The subscript **Proc-SetContactName** is used for this purpose.
- Creates a new record in the **ContactLocations** database using the **ContactLocations** database script **Addr-CreateCoLoRecord**.

“Proc-SetContactName” Script

Used as a subscript to the **Addr-IndivStep2AddContactRecord** script, to set the value of the **Contacts** database **ContactName** field based on a calculation that differs according to record type. The result is a person’s name, the value set in **ContactLocations** database global field **_gOrg**, or a concatenation of **ContactLocations** database global fields **_gGroupLabelLine1** and **_gGroupLabelLine2**.

“Addr-CreateCoLoRecord” Script

This script is used as a subscript to the **Addr-IndivStep2AddContactRecord** script, to create a new **ContactLocations** record related to the **Contacts** database record being newly added.

This script:

- Creates a new **ContactLocations** record
 - Sets the value of **Navigator** global field **_gContactLocationID**.
 - Sets the values of **ContactLocations** database fields **_kPCL** (= **_gContactID** concatenated with “Yes”), **_kContactID** (= **_gContactID**).
- [Note: **Contacts** database field **_kPCL** is a calculated field assigned the value **_kContactID** concatenated with “Yes”, so one effect of these assignments is to establish a relationship between the current **Contacts** record and the newly created **ContactLocations** record.]
- Sets the values of **Contacts** database fields **_ContactLocationID** (= **_kContactLocationID**), **_gCurrContactLocationID** (= **_kContactLocationID**).
 - If adding a record related to a “organization”, sets the values of the **ContactLocations** database fields **Org** (= value of **Contacts** database global field **_gContactName**) and **ContactLocationName** (= “Office”).
 - If adding a record related to a “family”, sets the value of the **ContactLocations** database field **ContactLocationName** (= “Home”).

“EnterLocation” Layout

This layout provides the user a field to enter a value for the **Contacts** database global field **_gDeliveryAddress**.

The portal displayed on this layout shows matching values of the **Locations** database field **AddressLine2** for **Locations** records where this value matches the value of **_gDeliveryAddress** entered by the user.

If the user selects a record displayed in the portal, the **ContactLocations** script **Addr-AddLocationToExistingContactLocation** script is executed.

“Addr-AddLocationToExistingContactLocation” Script

This script is executed when a user of the **Contacts** database **EnterLocation** layout selects a portal that displays an address from an existing **Locations** database record with an address corresponding to the address they’ve entered into the **_gDeliveryAddress** field on that layout. .

This script:

- Sets the value of the **ContactLocations** database field **_kContactID** (= value of **Locations** database field **_kLocationID** from record related through the on the **CON_gDeliveryAddress\LOCAddressLine2** relationship)
[Note: This relationship is the one used to define the portal on the **Contacts** database **EnterLocation** layout. Since this script is started by the user’s selection of a row from this portal, a specific related record in the **Locations** database is clearly indicated as the source of the value assigned to the **_kContactID** field.]
- Clears the value of the **Contacts** database field **_gDeliveryAddress**.
- Starts the **Contacts** database script **Nav-EditPCLData**.

“Addr-Step3CreateLocationRecord” Script

This script is used when the user of the **Contacts** database **EnterLocation** layout hits the “OK” button there rather than selecting a portal row representing a pre-existing **Locations** record. This would typically be the user’s response when no preexisting **Locations** record matches the address desired for the new **Contacts** record.

- If the user has entered no address to be used in creating the new record, the **Contacts** database script **Nav-EditPCLData** is started with the value of field **_gDeliveryAddress** set to “unknown address”.
- Otherwise (is “otherwise” correct??), the script performs the following actions:
 - Runs the **Locations** database script **Addr-CreateNewLocation** to create a new **Locations** record. This script:
 - Creates a new **Locations** database record
 - Sets the **Navigator** database field **_gLocationID** to the value of **_kLocationID** for the newly created **Locations** record
 - Sets the value of the **Locations** database field **AddressLine2** to the value of the **Contacts** database global field **_gDeliveryAddress**.

- Sets the value of the **ContactLocations** database field **_kLocationID** on the primary contact location record corresponding to the newly created **Contacts** record to the value of **Navigator** database global field **_gLocationID**.
- Clears the values of the following **Contacts** database fields:
 - _gLocationID**
 - _gNamePrefix**
 - _gNameFirst**
 - _gNameMiddle**
 - _gNameLast**
 - _gNameSuffix**
 - _gDeliveryAddress**
 - _gContactName**
- Transfers the user to an appropriate subscript to guide further data editing based on whether the newly created location record is to be designated the primary contact location (**Contacts** database script **Nav-EditPCLData**) or not (**Contacts** database script **Nav-EditNotPCLData**).

“Nav-EditPCLData” Script

This script is used as a subscript by several scripts involved in the “Add Contact” process.

This script:

- Checks that the user has appropriate access privileges before allowing them to proceed.
- Sets the values of **Contacts** database global fields **_gCurrContactLocationID** (= **PCL::_kContactLocationID**), **_gContactLocationID** (= **PC::_kContactLocationID**), **_gLocationID** (= **PCL::_kLocationID**)
- Clears the value of **Navigator** global field **_gMakePCL**.
- Sets the values of **ContactLocations** global fields to the values of the corresponding **Contacts** database fields

- _gNamePrefix**
- _gNameFirst**
- _gNameMiddle**
- _gNameLast**
- _gNameSuffix**
- _gNameSalutation**
- _gGreetingPerferred** (note misspelling of “preferred”)
- _gGreetingCustom**
- _gPhoneMobile**
- _gPhonePager**

_gInternetChatID

_gProfileNote

_gURL

_gSource

_gContactRecordType

_gGroupLabelLine1

_gGroupLabelLine2

- Sets the values of the following **ContactLocations** database global fields to the values of corresponding fields on the **ContactLocations** record related to the current **Contacts** record by the relationship **CON_gCurrContactLocationID\COL_kConLocationID**:

_gPhone

_gPhoneExtension

_gContactLocationName

_gTitle

_gOrg

_gOrgCategory

_gOrgOfc

_gOrgDept

_gEmail

_gFax

- Sets the values of the following **ContactLocations** database global fields to the values of corresponding fields on the **Locations** record related to the current **Contacts** record by the relationship **CON_gLocationID\COL_kLocationID**:

_gAddressLine1

_gAddressLine2

_gCity

_gCounty

_gStateProv

_gZIPPostalCode

_gcZIP4

_gCountry

_gGMT

_gTimeZone

_gUSPS_ADC

- If no **ContactLocation** record has been designated as a primary contact location corresponding to the current **Contacts** record, the user is moved to the **Contacts** database **EditContactNoLocation** layout.
- Sets the value of the Navigator database global field **_gMakePCL** to “Yes”
- Transfers the user to the correct layout for the type of record being entered:
 - “Individual” uses **Contacts** database layout **EditIndividual**
 - “organization” uses **Contacts** database layout **EditOrganization**
 - “family” uses **Contacts** database layout **EditFamily**.

“Nav-EditNotPCLData” Script

This script is used as a subscript by several scripts involved in the “Add Contact” process. It’s function is extremely similar to the function of the **Nav-EditPCLData** script described above. It differs only in:

- the control mechanism used to transfer the user to the **EditContactNoLocation** layout
- the mechanism used to set the **ContactLocations** global field **_gFax**

“EditIndividual” Layout

This layout displays:

- Fields from the **Contacts** database:
 - ContactRecordType**
 - NameNickname**
 - _ccInvalidEmail**
 - _ccSharedAddressFlag**
- Global fields from the **ContactLocations** database:
 - _gSource**
 - _gTimeZone**
 - _gGMT**
 - _gNamePrefix**
 - _gNameFirst**
 - _gNameMiddle**
 - _gNameLast**
 - _gNameSuffix**
 - _gName**
 - _gContactLocationName**
 - _gTitle**
 - _gOrgOfc**

_gDept
_gOrg
_gAddressLine1
_gAddressLine2
_gCity
_gStateProv
_gZIPPostalCode
_gcZIP4 (note aberration in naming convention)
_gCountry
_gCounty
_gEmail
_gURL
_gPhone
_gPhoneExtension
_gFax
_gPhoneMobile
_gPhonePager
_gGreetingPerferred
_gGreetingCustom
_gNameSalutation
_gUTMNorthing
_gUTMEasting
_gUSPS_ADC
_gProfileNote

When the user hits the “OK” button, the Contacts database script Addr-CommitAddressEdits is run.

“EditFamily” Layout

This layout displays:

- Fields from the **Contacts** database:
ContactRecordType
_ccInvalidEmail
_ccSharedAddressFlag
- Global fields from the **ContactLocations** database:
_gSource
_gTimeZone

_gGMT
_gGroupLabelLine1
_gGroupLabelLine2
_gContactLocationName
_gAddressLine1
_gAddressLine2
_gCity
_gStateProv
_gZIPPostalCode
_gcZIP4 (note aberration in naming convention)
_gCountry
_gCounty
_gEmail
_gURL
_gInternetChatID
_gPhone
_gPhoneExtension
_gFax
_gPhoneMobile
_gPhonePager
_gUTMNorthing
_gUTMEasting
_gGreetingPerferred
_gGreetingCustom
_gUSPS_ADC
_gNameSalutation
_gProfileNote

When the user hits the “OK” button, the Contacts database script Addr-CommitAddressEdits is run.

“EditOrganization” Layout

This layout displays:

- Fields from the **Contacts** database:

ContactRecordType
_ccInvalidEmail

_ccSharedAddressFlag

- Global fields from the **ContactLocations** database:

_gSource**_gTimeZone****_gGMT****_gOrg****_gOrgCategory****_gContactLocationName****_gAddressLine1****_gAddressLine2****_gCity****_gStateProv****_gZIPPostalCode****_gcZIP4 (note aberration in naming convention)****_gCountry****_gCounty****_gEmail****_gURL****_gPhone****_gPhoneExtension****_gFax****_gPhoneMobile****_gPhonePager****_gUTMNorthing****_gUTMEasting****_gGreetingPerferred****_gGreetingCustom****_gUSPS_ADC****_gNameSalutation****_gProfileNote**

When the user hits the “OK” button, the **Contacts** database script **Addr-CommitAddressEdits** is run.

“Addr-CommitAddressEdits” Script

This script assigns values to standard database fields in the **Contacts**, **ContactLocations**, and **Locations** databases based on the values submitted by the user in **Contacts** database global fields.

This script:

- Assigns values to these **Contacts** database fields from the values of corresponding **Contacts** database global fields:

NamePrefix

NameFirst

NameMiddle

NameLast

NameSuffix

NameSalutation

GreetingCustom

GreetingPreferred

PhoneMobil

PhonePager

InternetChatID

ProfileNote

URL

Source

ContactRecordType

GroupLableLine1 (note misspelling of “label”)

GroupLableLine2 (note misspelling of “label”)

- Assigns values to these **ContactLocations** database fields from the values of corresponding **Contacts** database global fields:

Phone

PhoneExtension

OrgTitle

OrgCategory

Org

OrgDept

OrgOfc

Email

Fax

ContactLocationName

- If the user marks the **Locations** database record for removal from association with the current **Contacts** record, the script:
 - Clears the value of **Contacts** field **_gMarkLocationForDeletion**
 - Clears value of **ContactLocations** field **_kLocationID**
- If the user marks the **ContactLocations** database record for removal from association with the current **Contacts** record, the script assigns values to the following **ContactLocations** fields:

_fDelete**DeleteReason****DeleteDate****DeleteBy****_gMarkCoLocForDeletion** (global field)

- Assigns values to these **Locations** database fields from the values of corresponding **Contacts** database global fields:

AddressLine1**AddressLine2****City****StateProv****ZIPPostalCode****ZIP4****Country****County****GMT****TimeZone****GEOCODEUTMEasting****GEOCODEUTMNorthing****USPS_ADC**

- Runs the **Contacts** database script **Proc-SetContactName** (described earlier in this document).
- If the newly created **ContactLocations** record is to be used as the primary contact location, the script resets the values of **_kPCL** on the preexisting PCL record and the new PCL record using the **Contacts** database **Proc-MakePCL** script. Otherwise, it ensures that the value of **_kPCL** for the newly created **ContactLocations** record is set appropriately for that record *not* being the PCL record.
- Clears the values of **Contacts** database fields **_gCurrContactLocationID** and **_gfAddingRecord**.

- Sets the value of the **Contacts** field **_kDupecheck** (= **_ccDupecheck**) using the **Contacts** script **Proc-SetDupecheckKey**. [Note: this field is used in a relationship to display possible pre-existing records corresponding to a contact for whom a new **Contacts** record is desired using the **Contacts** database **EnterContact** layout.
- Transfers the user to the correct **Contacts** database “Overview” layout for the record type specified for the newly created **Contacts** record.