



# How does the Corporate Utility application sync affiliated packages

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## Introduction

Once set up any matching client memberships need to have the specified package associated with them, and if each client has any existing package records they need to be combined and the single remaining client package record associate with the client membership record.

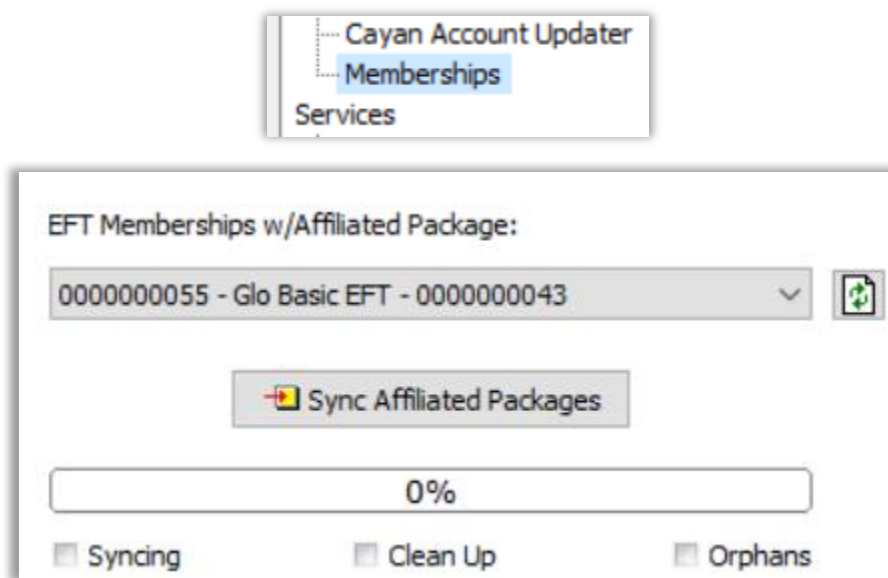
A pass also has to be done after a conversion to hook up all the transferred client memberships and client packages.

## SunLync Setup

Beyond the scope of this document.

## Corporate Utility

Launch the application and select the Memberships option on the left:



The drop down contains memberships with an affiliated package – information shown is a) membership number, b) membership description, and c) package number.

The button to the right refreshes the list in case something's missing; you called someone to fix it, and they've said it should be good to go.

## Date Clean Up

All client memberships with an affiliated package are “open ended”, so we make sure ahead of time that the Expiration Date field is set accordingly.

For every client membership matching the selected membership number that's Active, On Hold, Purchased, or Cancelled whose expiration date is not null, an empty string, or 0000-00-00 → we set it to 0000-00-00.

Said value of 0000-00-00 is one of the values that means open ended to various SunLync applications.

## Client Membership Records

We're now ready to process matching client membership records.

This is done by selecting a few pertinent fields from Client Memberships table where: a) EFT = 1, b) Status is NOT Expired, Terminated, Upgraded, Refunded, or Voided, c) Membership Number matches the membership we're processing, and d) the Affiliated Client Package field does not have a value.

We now spin through all of these records pulling out some values we need to work with such as client number, expiration date, status, and membership id.

## Packages By Client

For each client, we need to see if they have any existing Client Package records matching the selected package number.

We do this by selecting from Client Packages where: a) the client number matches, b) the package number matches, and c) the package status is either Active, On Hold or Purchases AND the expiration date is either: 1) null, 2) blank, or 3) 0000-00-00.

We order this resulting record by client package purchase date in descending order.

This is done for the case where there are multiple records we will want to combine them summing up their units' left values and place them on the most recently purchased one which we know is the first record in the set because of the order by.

## No Matches – Create New Client Package Record

*We need to create a new Client Packages record.*

Start by snarfing out the Store Code from the Clients table using the client number, and the standard numbers of units for the package in question from the Packages table.

Next since we're creating a new client packages record, we need a unique ID number for it, so we use an internal routine that generates one based on the current value of Packageld in table AutoNumber.

We now insert a client package record for the current client with Purchase Date and Active Date of today, Last Modified date/time of right now, and numbers and IDs as appropriate.

We then need to determine if the Client Membership record counts as "active" or not so we can assign the final values.

Client Membership records are "active" if: a) the status is Active, On Hold or Frozen AND the expiration date is null, 000-00-00, or greater than or equal to today's date, OR c) the status is Cancellor and the expiration date is greater than or equal to today's date.

If the Client Membership record is "active" then package status is set to Active, number of units from the Package record, and expiration date to 0000-00-00...

... BUT THEN if the Client Membership status is On Hold, we re-set the client package status to On Hold and the Hold Date field to today's date.

If the Client Membership record is NOT "active" then the status is set to Expired, the number of units to 0.00, and the expiration date to today's date.

Finally, we make an entry in the PackagesLog table with the note "CorpUtil inserted package during affiliated syncing".

## Clean Up – Shares

If we're using the "new" shared packages scheme, which really everyone should be on by now, we need to tweak the shared record scenario a bit.

First, we check to see if we've had any previous instances of the package by checking if any matches are expired and selecting the most recently expired one.

If so, then if there were any non-owner (Owner = 0) Shared Packages records we insert new shared package records 1 for 1 with the Package ID value to the new affiliated package id.

Finally, we insert a new Shared Packages record for the client package record we just inserted setting Owner = 1.

## At Least 1 Matching Record – Sum Units Left

We have 1 or more Client Package records for the client and membership numbers in question.

Spin through records 2 to N, recall the order by we did earlier so we're skipping the first record which is the most recent purchase till later, summing up any Units Left value and expiring them as we go as well as setting units left to 0.00 and Last Modified to the current date and time.

When done, we update record 1 with the sum of the units as well as setting Last Modified to the current date and time.

Finally, we make an entry in the PackagesLog table with the note "CorpUtil updated package during affiliated syncing".

## Syncing

Now that we have either a new Package ID value or the one from the Client Packages record, we summed all the units left into – update the Client Memberships record field Affiliated Client Package with that ID.

## Clean Up – Non-Qualifying Client Packages

We need to expire any dangling active Client Package records, i.e. active client package records when there are no active client memberships.

First, we get a list of client numbers from Client Memberships that are NOT "active" where: a) EFT = 1, b) the membership number matches the one we're working with, and c) the status is either Expired, Terminated, Upgraded, Refunded, or Voided.

For each of these client numbers we then see if they also have any "active" Client Membership records where: a) EFT = 1, b) the membership number matches the one

we're working with, and c) the status is NOT Expired, Terminated, Upgraded, Refunded, or Voided.

If there ARE "non-active" Client Memberships records and there ARE NOT any "active" Client Membership records – select any Client Packages records for that client that have a PackageStatus of Active and expire them by setting package status to Expired, Expiration Date to today, and Last Modified to right now.

### Clean Up – Orphans

The orphans' processing pass is currently disabled.

And you're done!