

Globally Creating Interface IDs in ClientBase

If your ClientBase profiles are lacking Interface ID's and you would like to run a routine that automatically assigns an Interface ID to each profile that does not contain one, use our Interface ID Generator Utility. This utility can be used to automatically create Interface IDs for those profiles that do not have any. Be sure that you have a restorable backup of the ClientBase database before running this utility.

- 1) Download the Interface ID Generator Utility.
- 2) Open the Interface ID Generator Utility. Go to **Start|Run** and browse for the Intergen.exe file saved on your computer and click OK to open.
- 3) Setup Interface ID Generator:

Alias: From drop-down menu, select the ClientBase alias. Default is TRAMS.

Path: By default the path to the database is shown. This path cannot be changed here, but can be modified in the Alias Utility.

Login Name/Password: Login Name defaults to the SYSDBA. Enter password.

Required Filters/Profile Types: The default is Leisure, but you can also select Corporate or Leisure and Corporate from the drop-down menu.

Required Filters/Interface ID Mask: The Interface ID you are generating in ClientBase can be based on the Full Name field, First Name field, Last Name field, the Residential Phone field, or a combination of the all those fields (from 1-10 alpha-numeric characters). N uses a character from the name field, F uses a character from the first name field, L uses a character from the last name field, and a digit uses that position from the residential phone field (1 signifies the 1st digit of the phone number and 0 signifies the 10th digit of the phone number).

Select a sample mask from the drop-down menu or create any mask that you desire. We recommend using the Interface ID mask of NNN4567890 which uses the first 3 letters of the client's last name, and the last 7 digits of the client's phone number. (If no phone number exists, an Interface ID is generated with just the first 3 characters of the client's last name.)

Sample masks:

Mask	Name Field	Phone Field	Interface ID
NNN4567890	MEYER/SHARON	+1 (310) 641-8726	MEY6418726
NNNNNNNNNN	ROSEN/LEE	+1 (310) 641-8726	ROSENLEE
N6N7N8N9N0	PALLEY/DAN	+1 (310) 641-8726	P1A8L7L2E6
FFFF-LLLLL	SMITH/JANE	+1 (310) 555-1234	JANE-SMITH
NN-4567890	SMITH/JOHN	+1 (310) 987-6543	SM-9876543

Note: Characters from the name field are taken from left to right. Slashes and spaces are skipped. Any characters that is not an "N", not an "F", not an "L", and not a digit from "0" to "9" are treated as a constant. See last two samples above where "-" is in the mask.

4) Click RUN to start.

5) Run the Profile Dupe Checker in ClientBase. If you have used the suggest mask of NNN4567890 to generate Interface IDs, and the profile did not have a phone number, you may have duplicate Interface IDs. This is because the generator only picked up the first 3 letters of the profiles' last name. So all profiles with the same first 3 letters will have a duplicate Interface ID. Use the Dupe Checker routine and search by "Interface ID" to find these and give each of these a unique Interface ID by using the Profile Number that ClientBase assigned.