

Processing Rules

Global AlertLink's import process is highly flexible and customizable. Our engineers will work with you to set up processing rules that can manipulate your data automatically. These processing rules can apply simple changes as well as very complex and sophisticated data rules. A common example of a simple data change would be to "trim" whitespace from each field (first name, last name, etc.). However, some customers have a need to manipulate the data to apply business rules during the import. Consider the following scenario: Corporate has specified that during the data import, all employees should be listed in an "Employees" folder for each organizational unit. However, the Director of Accounting also needs to see his/her employees separated by business function and would like Accounts Payable employees to be listed in an Accounts Payable folder, while accounts receivable employees will be listed in an Accounts Receivable folder. To accommodate this scenario, our engineers will define an import processing rule to separate the data.

Note that these processing rules allow our engineers to work with you to dynamically adjust your data to accommodate a variety of data changes such as specifying:

- Which organization or folder to list a contact under;
- Which organization or folder to share a contact to;
- The overriding a contact method (phone, SMS or email) with a "default" value; and
- How to clean or sanitize the data.

If you have a special data manipulation need, contact us.