



Bulk Conflict Check Utility

Released with V4.18.16 and V5.18.16

30th September 2021

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Introduction

A new standalone utility has been added to this release to allow conflict searching to be done in bulk based on a supplied list of names and details in a CSV flat file. Two new files are now available in the Connect plugins folder (...\\sosobject\\Connect\\SOSProgs\\Plugins):

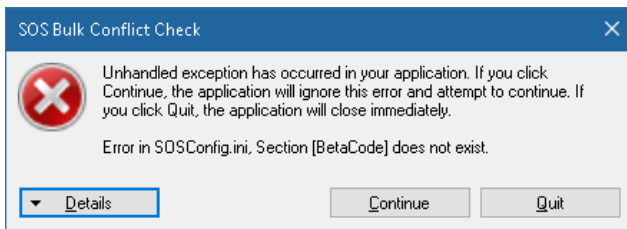
- **BulkConflictCheck.exe** The executable file to run
- **BulkConflictCheck.exe.config** Configuration settings for the utility

This new utility is tied to a specific Connect version: you cannot copy these files from one Connect version and run it on a different Connect version.

Running the utility

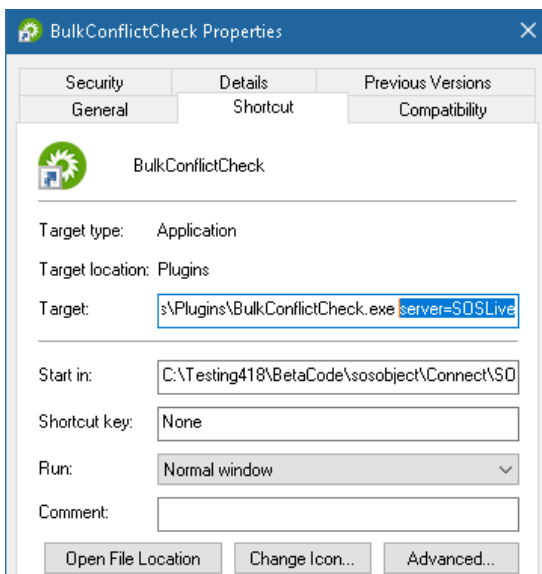
Double-click the executable file **BulkConflictCheck.exe** to run it.

You may see the following message:



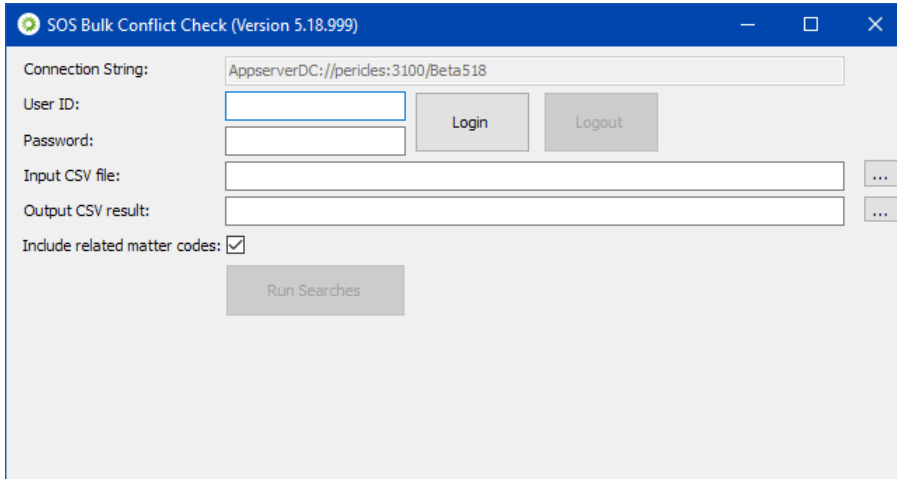
If the above message is displayed it means the SOS Connect AppServer name derived from the folder structures above the Connect plugins folder cannot be found within the Connect configuration file **sosconfig.ini**.

This can be resolved by creating a new shortcut to the executable with a command line parameter added on the end to specify the specific server definition within the configuration file to use, for example **...\\BulkConflictCheck.exe server=Live** as shown below:



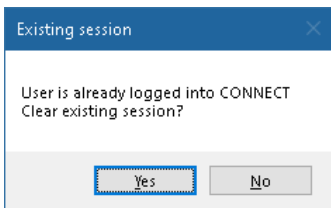
Operating Instructions

When the application starts successfully you will see the screen below:

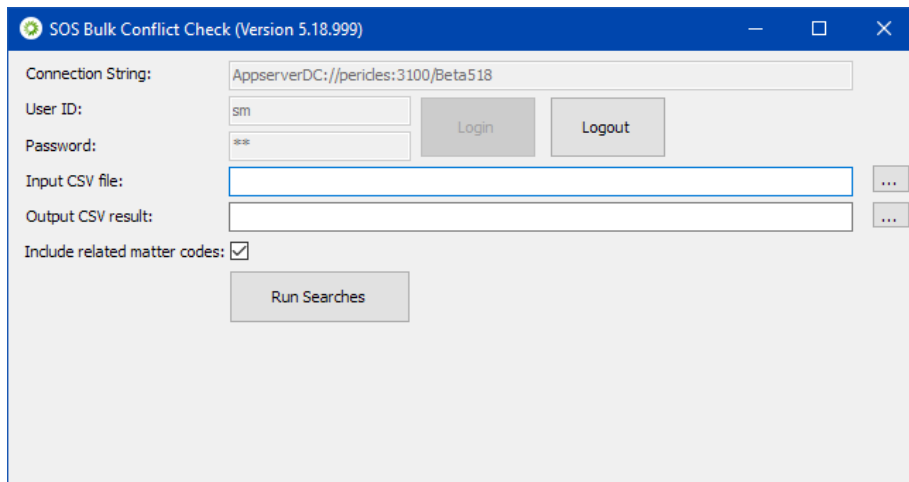


The AppServer connection string shown as a read-only field at the top of the screen is derived from the sosconfig.ini file in the same way as Connect.

- Enter a valid Connect user ID and password and click **Login** (or press Enter/Return). Please note that this utility does not currently support single sign-on.
- This will attempt to login in exactly the same way as Connect. If existing sessions exist for the user specified then messages will be shown asking you to confirm whether existing Connect or accounts sessions should be cleared. If you say **Yes** in this messages then any existing Connect/accounts sessions for this user will be logged out.

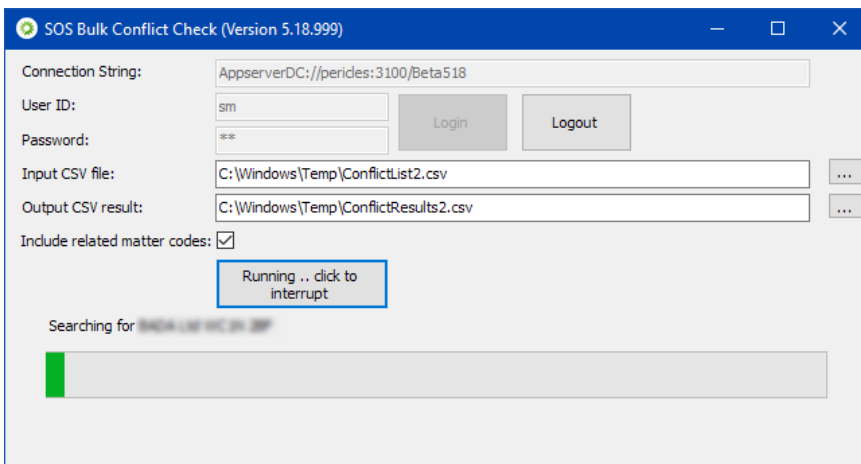


- Once you have successfully logged in the screen display will enable different options:

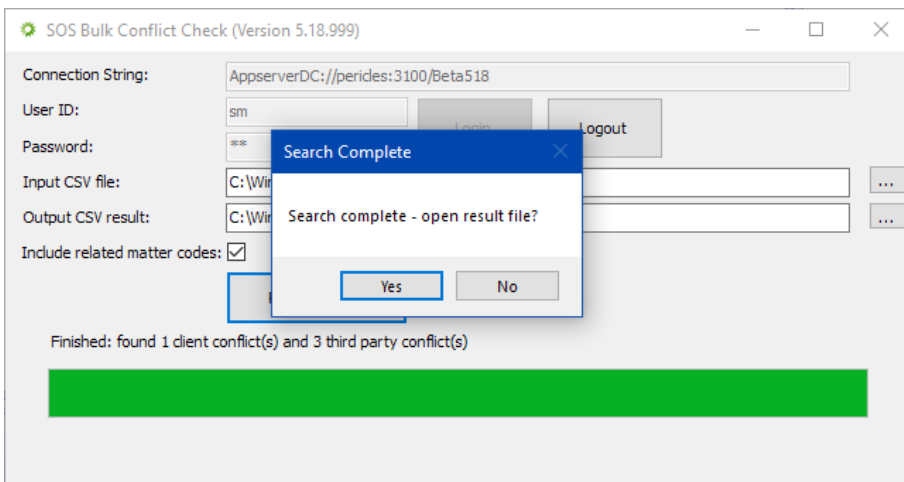


- You can now browse to the input CSV file containing names and post codes, and also specify the output CSV file name which will contain the search results
- The required format of the input CSV file is fixed as follows:
 - Line 1 of the CSV file is assumed to be a header and not data to search
 - Primary client/contact details:
 - Column A – contact/client forename
 - Column B – contact/client surname
 - Column C - organisation name
 - Column D - contact/organisation post code
 - Related party details:
 - Column E - related / third party individual forename
 - Column F - related / third party individual surname
 - Column G - related / third party organisation name
 - Column H - related / third party post code
 - Column I – notes (ignored but retained in output file)
 - If column C is populated this indicates the primary contact is an organisation and columns A & B must be empty
 - If column C is empty this indicates the primary contact is a person and column B must be populated (column A is optional)
 - Column D is optional
 - Columns E to I are optional
 - If column G is populated this indicates the third party is an organisation – columns E & F must be empty
 - If column G is empty and column F is specified, this indicates the third party is a person, in this case column E is optional

- Column I is ignored in conflict searches but included in output file
- If multiple forenames are specified in either column A or F then only the first forename is used in the conflict search
- The option **Include related matter codes** is switched on by default but can be switched off if required. With it switched on, for any conflict found, the output file will include additional columns listing the live matters relating to the conflicting individual or organisation. With it switched off the additional columns for matter codes will not be included. Including the list of matter codes in the output file will require additional processing time.
- Once all the selections have been made, click the **Run Searches** button to start the search process running:



- If the search needs to be interrupted part way through, just click on the button which is now labelled as **Running...click to interrupt**
- Once all the searches in the input file have completed, the total number of conflicts found for primary contact/client and related party are shown in the main screen, with the option to open the output file (in Excel)



- The output file contains a copy of all the data provided in the input file, with the following additions:

- Extra column E inserted showing count of matches on primary contact details
 - Extra column F inserted showing first match to primary contact details
 - (An extra column G is inserted listing related live matters to the first conflict match if the matter codes option is enabled)
 - Extra column L/M added showing count of matches on third party details
 - Extra column M/N added showing first match to third party details
 - (An extra column O is inserted listing related live matters to the first third-party conflict match if the matter codes option is enabled)
- Example Excel output is shown below (without the related matter codes option):

A	B	C	D	E	F	G	H
Forename	Surname	Organisation Name	Postcode	Client Matches	Example Match	Third Party Forename	Third Party Surname
		Test Organisation Ltd	AA4 7AS	1	Test Organisation Ltd	Michael	Smith

I	J	K	L	M
Organisation Name	TPPostCode	Rel Type	Third Party Matches	Example Match
	AA4 7AS	Director	1	Smith Michael Mr AA4 7AS (CO:9)

- Excel filters can then be applied to columns E and L (or E and M if the matter codes option is enabled) to only show the conflicts found

Closing the utility

Close the utility with the [X] button – this will automatically log the user out of the special Connect session that this utility is using.

Settings

The supplied settings file **BulkConflictCheck.exe.config** contains the search field codes that are used in standard Connect conflict searching. If required, this list of search fields can be amended to include more or fewer search fields. Please seek advice from SOS on amending these search fields if this becomes a requirement.