CRM Task Process

SEI Templates
Functional Specification

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1 Revision history

Date	Who	Description
2013/06/25	Johann Salas	Document creation
2013/07/07	Edgardo Mejia	Document Update

2 Business need

The Task process provides with useful fields to manipulate data around all the taks that are provided by the employees. Reports of the task by customers with information about their due date, priority and contact information can be extracted from the Sage ERP X3 databases using this process.

3 Constraints & restrictions

- This process is only compatible with Sage ERP X3 V6 and V7.
- Views associated to the process must be created prior installation.
- New prompts associated to the process must be created prior installation.

4 Technical specification

4.1 Involved tables/views

Element	Alias	Type
TASK	TASK	Fact Table
OPPOR	OPPOR	Table
FACILITY	FACILITY	Table
SALESREP	SALESREP	Table
BPARTNER	BPARTNER	Table
CORRESPOND	CORRESPOND	Table
CONTACTCRM	CONTACTCRM	Table
APLSTD	APLSTD	Table

4.2 Joins between tables

From Table Name	From Table Alias	Type of Join	Linked Table	Linked Alias	Join
TASK	TASK	Left	OPPOR	OPPOR	TASK.TSKPJT_0 = OPPOR.OPPNUM_0
TASK	TASK	Left	FACILITY	FACILITY	TASK.SALFCY_0 = FACILITY.FCY_0
TASK	TASK	Left	SALESREP	SALESREP	TASK.TSKREP_0 = SALESREP.REPNUM_0
TASK	TASK	Left	BPARTNER	BPARTNER	TASK.TSKCMP_0 = BPARTNER.BPRNUM_0
TASK	TASK	Left	CORRESPOND	CORRESPOND	TASK.TSKCOR_0 = CORRESPOND.CORNUM_0
TASK	TASK	Left	CONTACTCRM	CONTACTCRM	TASK.TSKCCN_0 = CONTACTCRM.CNTNUM_0
TASK	TASK	Left	APLSTD	APLSTD	TASK.TSKORI_0 = APLSTD.LANNUM_0

4.3 Specific Joins

Linked Alias	Linked Field	Operator	Specific Value
APLSTD	LANCHP_0	Equal	2992
APLSTD	LANNUM_0	Equal	@CurrentLang;
APLSTD	LANNUM_0	Greater than	0

4.4 Fields

Table	Alias	Field	Description	Type	Prompt
TASK	TASK	TSKPJT_0	Project Code	Dimension	Yes
OPPOR	OPPOR	OPPDES_0	Project Description	Description	No
TASK	TASK	TSKNUM_0	Task Code	Dimension	No
TASK	TASK	TSKDES_0	Task Description	Description	No
TASK	TASK	TSKRPO_0	Task Report	Dimension	No
TASK	TASK	TSKDAT_0	Task Due Date	Dimension	No
TASK	TASK	TSKPIOLEV_0	Task Priority	Dimension	No
TASK	TASK	TSKORI_0	Task Source	Dimension	Yes
APLSTD	APLSTD	LANMES_0	Task Source Desc.	Description	No
TASK	TASK	SALFCY_0	Site Code	Dimension	Yes
FACILITY	FACILITY	FCYNAM_0	Site Description	Description	No
TASK	TASK	TSKREP_0	Salesrep Code	Dimension	Yes
SALESREP	SALESREP	REPNAM_0	Salesrep Description	Description	No
TASK	TASK	TSKCMP_0	Customer Code	Dimension	Yes
BPARTNER	BPARTNER	BPRNAM_0	Customer Description	Description	No
TASK	TASK	TSKCOR_0	Contact Code	Dimension	No
*SERVER	*SERVER	FLD0000001	Contact Description	Description	No
TASK	TASK	TSKCCN_0	Contact (Rel) Code	Dimension	No
*SERVER	*SERVER	FLD0000002	Contact (Rel) Description	Description	No

4.5 Calculated fields

Field	Description	Type	Prompt	Expression
FLD0000001	Contact Description	Description	No	CORRESPOND.FNA_0 + ' ' + CORRESPOND.LAN_0
FLD0000002	Contact (Rel) Description	Description	No	CONTACTCRM.CNTFNA_0 + ' ' + CONTACTCRM.CNTLNA_0

4.6 Prompts

List of added prompts for this process:

Name
Project
Task Source
Facility (Site)
Salesrep
Customer

4.7   Notes:

Quantity fields in this process must be handled with caution. They have been summed up in order to appear in grouped lines; however, the values will only be significant if the sums are done on the same units.

When working with data in a multi-company and/or multi-currency data environment, some fine tuning is necessary. The fields containing prices and other numbers that are related to a particular currency are gathered as they are entered at the transaction level. Adjustments may be needed to compare different currencies, such as applying rates to bring all data to the same currency.