CRM Phone Call 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 Phone Call process provides with useful fields to manipulate data around all the phone calls that are registered by the employees. Reports of the phone calls by Sales Representative with information about their date of generation and return, duration of the call 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
PHONECALL	PHONECALL	Fact Table
FACILITY	FACILITY	Table
SALESREP	SALESREP	Table
CORRESPOND	CORRESPOND	Table
CONTACTCRM	CONTACTCRM	Table
OPPOR	OPPOR	Table
BPARTNER	BPARTNER	Table

4.2   Links between tables

From Table Name	From Table Alias	Type of Join	Linked Table	Linked Alias	Join
PHONECALL	PHONECALL	Left	FACILITY	FACILITY	PHONECALL.SALFCY_0 = FACILITY.FCY_0
PHONECALL	PHONECALL	Left	SALESREP	SALESREP	PHONECALL.CLLREP_0 = SALESREP.REPNUM_0
PHONECALL	PHONECALL	Left	CORRESPOND	CORRESPOND	PHONECALL.CLLCMP_0 = CORRESPOND.CORNUM_0
PHONECALL	PHONECALL	Left	CONTACTCRM	CONTACTCRM	PHONECALL.CLLCOR_0 = CONTACTCRM.CORNUM_0
PHONECALL	PHONECALL	Left	OPPOR	OPPOR	PHONECALL.CLLCCN_0 = OPPOR.CNTNUM_0
PHONECALL	PHONECALL	Left	BPARTNER	BPARTNER	PHONECALL.CLLOPP_0 = BPARTNER.OPPNUM_0

4.3   Fields

Table	Alias	Field	Description	Type	Prompt
PHONECALL	PHONECALL	CLLOPP_0	Project Code	Dimension	Yes
OPPOR	OPPOR	OPPDES_0	Project Description	Description	No
PHONECALL	PHONECALL	CLLNUM_0	Call Code	Dimension	No
PHONECALL	PHONECALL	CLLOBJ_0	Call Summary	Measure	No
PHONECALL	PHONECALL	CLLRPO_0	Call Report	Dimension	No
PHONECALL	PHONECALL	CLLDAT_0	Call Date	Dimension	No
PHONECALL	PHONECALL	CLLDATX_0	Call Returned	Dimension	No
PHONECALL	PHONECALL	CLLDUR_0	Call Duration	Measure	No
PHONECALL	PHONECALL	CLLDON_0	Call Executed	Dimension	No
PHONECALL	PHONECALL	CLLETS_0	Call Direct #	Dimension	No
PHONECALL	PHONECALL	CLLMOB_0	Call Mobile #	Dimension	No
PHONECALL	PHONECALL	SALFCY_0	Site Code	Dimension	Yes
FACILITY	FACILITY	FCYNAM_0	Site Description	Description	No
PHONECALL	PHONECALL	CLLREP_0	Salesrep Code	Dimension	Yes
SALESREP	SALESREP	REPNAM_0	Salesrep Description	Description	No
PHONECALL	PHONECALL	CLLCMP_0	Customer Code	Dimension	Yes
BPARTNER	BPARTNER	BPRNAM_0	Customer Description	Description	No
PHONECALL	PHONECALL	CLLCOR_0	Contact Code	Dimension	No
*SERVER	*SERVER	FLD0000001	Contact Description	Description	No
PHONECALL	PHONECALL	CLLCCN_0	Contact (Rel) Code	Dimension	No
*SERVER	*SERVER	FLD0000002	Contact (Rel) Description	Description	No

4.4   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

4.5   SQL Views
This process does not require any additional SQL view.

4.6   Prompts

List of required prompts for this process:

Name
Project
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.