

# CRM Appointment Process

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## SEI Templates Functional Specification

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Version Number: 2.0  
Document Created: 13-Jun-2013 14:00:00  
Document Updated: 08-Jul-2014 14:00:00  
Created by: Tangerine Software Inc.

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## 1 Revision history

Date	Who	Description
2013/06/25	Johann Salas	Document creation
2013/07/08	Edgardo Mejia	Document Update

## 2 Business need

The Appointment process provides with useful fields to manipulate data around all the appointments that are entered by the employees. Reports of the appointments by Sales Representatives with information about their date, duration, reason 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
BAPPOINT	BAPPOINT	Fact Table
FACILITY	FACILITY	Table
CORRESPOND	CORRESPOND	Table
BPARTNER	BPARTNER	Table
OPPOR	OPPOR	Table
SALESREP	SALESREP	Table
CONTACTCRM	CONTACTCRM	Table

## 4.2 Joins between tables

From Table Name	From Table Alias	Type of Join	Linked Table	Linked Alias	Join
BAPPOINT	BAPPOINT	Left	FACILITY	FACILITY	BAPPOINT.SALFCY_0 = FACILITY.FCY_0
BAPPOINT	BAPPOINT	Left	CORRESPOND	CORRESPOND	BAPPOINT.APTCMP_0 = CORRESPOND.CORNUM_0
BAPPOINT	BAPPOINT	Left	BPARTNER	BPARTNER	BAPPOINT.APTCOR_0 = BPARTNER.CORNUM_0
BAPPOINT	BAPPOINT	Left	OPPOR	OPPOR	BAPPOINT.APTCMP_0 = OPPOR.BPRNUM_0
BAPPOINT	BAPPOINT	Left	SALESREP	SALESREP	BAPPOINT.APTPJT_0 = SALESREP.OPPNUM_0
BAPPOINT	BAPPOINT	Left	CONTACTCRM	CONTACTCRM	BAPPOINT.APTREPNUM_0 = CONTACTCRM.REPNUM_0

## 4.3 Fields

Table	Alias	Field	Description	Type	Prompt
BAPPOINT	BAPPOINT	APTPJT_0	Project Code	Dimension	Yes
OPPOR	OPPOR	OPPDES_0	Project Description	Description	No
BAPPOINT	BAPPOINT	APTNUM_0	Appointment Code	Dimension	No
BAPPOINT	BAPPOINT	APTOBJ_0	Appointment Summary	Measure	No
BAPPOINT	BAPPOINT	APTRPO_0	Appointment Report	Dimension	No
BAPPOINT	BAPPOINT	APTDAT_0	Appointment Date	Dimension	No
BAPPOINT	BAPPOINT	APTDATX_0	Appointment Returned	Dimension	No
BAPPOINT	BAPPOINT	APTDUR_0	Appointment Duration	Measure	No
BAPPOINT	BAPPOINT	APTDON_0	Appointment Executed	Dimension	No
BAPPOINT	BAPPOINT	APTADD_0	Appointment Address	Dimension	No
BAPPOINT	BAPPOINT	APTADD_1	Appointment Address 2	Dimension	No
BAPPOINT	BAPPOINT	APTZIP_0	Appointment Zip	Dimension	No
BAPPOINT	BAPPOINT	APTCTY_0	Appointment City	Dimension	Yes
BAPPOINT	BAPPOINT	APTCRY_0	Appointment Country	Dimension	Yes
BAPPOINT	BAPPOINT	APTTEL_0	Appointment Phone	Dimension	No
BAPPOINT	BAPPOINT	SALFCY_0	Site Code	Dimension	Yes
FACILITY	FACILITY	FCYNAM_0	Site Description	Description	No
BAPPOINT	BAPPOINT	APTREPNUM_0	Salesrep Code	Dimension	Yes
SALESREP	SALESREP	REPNAM_0	Salesrep Description	Description	No
BAPPOINT	BAPPOINT	APTCMP_0	Customer Code	Dimension	Yes
BPARTNER	BPARTNER	BPRNAM_0	Customer Description	Description	No
BAPPOINT	BAPPOINT	APTCOR_0	Contact Code	Dimension	No
*SERVER	*SERVER	FLD0000001	Contact Description	Description	No
BAPPOINT	BAPPOINT	APTCCNUM_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
City
Country
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.