

Insightee Platform Data Interface

Overview

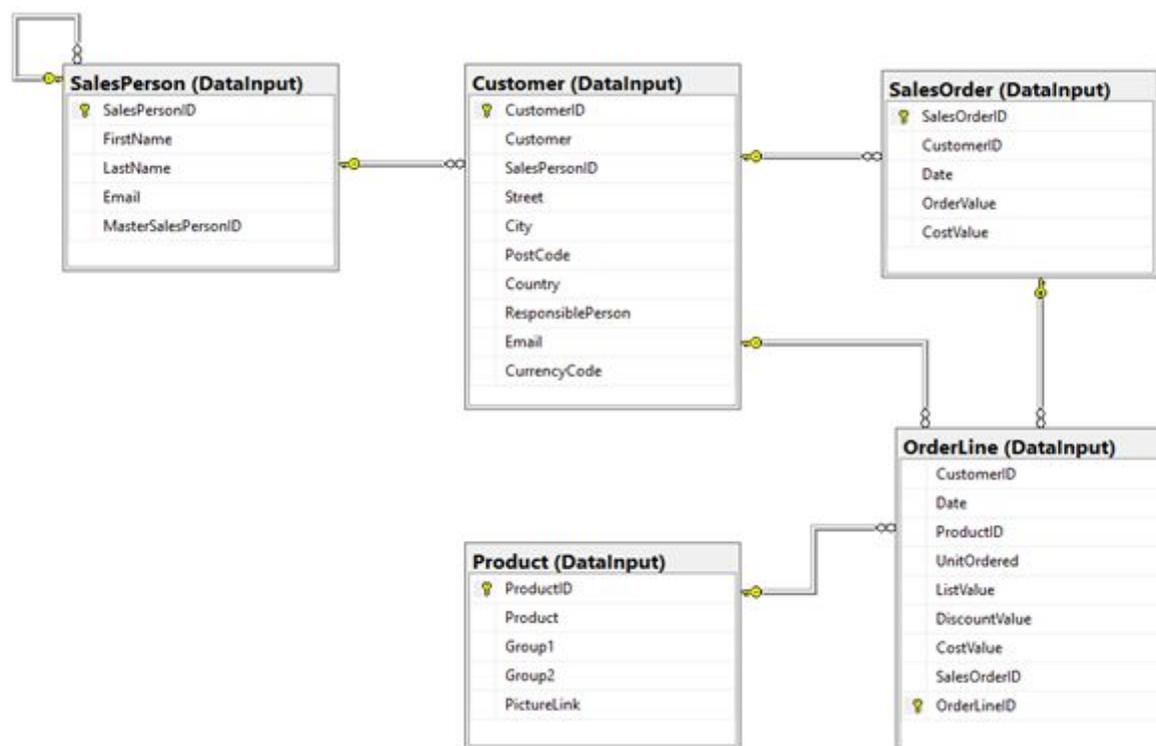
The Insightee Platform (IP) processes the purchase history and related dimensions on a daily basis. It sends alerts to individual sales representatives when a significant change in customers' behavior is detected. In order to achieve that the ERP or CRM data are required. This document describes the required and optional data to be provided daily.

The full load of all entities is preferred but incremental data delivery can be accepted in the case of a really large data volume.

A direct access to the source system using defined security is better than using extracts. However any format is acceptable (.csv, .json, API, direct DB connection), as long as data are consistent.

Data Model

The data model is based on the individual financial transactions (e.g. orders, order lines). The related Customer, Product and Sales Person list join the facts.



Attributes Specification

TABLE	COLUMN NAME	COMPULSORY	DATA TYPE	COLUMN DESCRIPTION
Customer	CustomerID	YES	nvarchar(50)	Unique identification of customer
	Customer	YES	nvarchar(100)	Customer name
	SalesPersonID	YES	nvarchar(50)	Current responsible sales person.
	Street	NO	nvarchar(100)	Street part of address
	City	NO	nvarchar(100)	City part of address
	PostCode	NO	nvarchar(100)	Post code part of address
	Country	NO	nvarchar(100)	Country part of address
	ResponsiblePerson	NO	nvarchar(100)	Responsible person, partner or decision maker at customer site.
	Email	NO	nvarchar(100)	Email to responsible person
	CurrencyCode	NO	nvarchar(10)	Currency definition in case it is different to customer default.
OrderLine	CustomerID	YES	nvarchar(50)	Identification of customer making an order. Not compulsory when found in Sales Order
	Date	YES	date	Date of the order. Not compulsory when found in Sales Order
	ProductID	YES	nvarchar(50)	Product ordered identification

	UnitOrdered	YES	int	Number of units ordered
	ListValue	YES	numeric(38,6)	List price value
	DiscountValue	YES	numeric(38,6)	Discount value. Place zero here when list price is used.
	CostValue	NO	numeric(38,6)	Cost value. Missing cost value will be calculated using agreed algorithm.
	SalesOrderID	YES	nvarchar(50)	Link to Sales order
	OrderLineID	YES	nvarchar(50)	Unique identification of lines at sales order
Product	ProductID	YES	nvarchar(50)	Unique identification of product
	Product	YES	nvarchar(50)	Product name
	Group1	NO	nvarchar(100)	Product grouping/categorisation - level1
	Group2	NO	nvarchar(100)	Product grouping/categorisation - level2
	PictureLink	NO	nvarchar(-1)	Link to product picture. The pictures should be available under specified security conditions.
SalesOrder	SalesOrderID	YES	nvarchar(50)	Unique identification of sales order
	CustomerID	YES	nvarchar(50)	Customer identification
	Date	YES	date	Date the order has been placed

	OrderValue	YES	numeric(38,6)	Total amount of order
	CostValue	NO	numeric(38,6)	Cost amount of order. Missing cost value will be calculated using agreed algorithm.
SalesPerson	SalesPersonID	YES	nvarchar(50)	Unique identification of sales person
	FirstName	YES	nvarchar(100)	First name
	LastName	YES	nvarchar(100)	Last name
	PhoneNumber	YES	nvarchar(50)	Phone number, only one active valid number (not displayed at above picture)
	Email	YES	nvarchar(100)	Email, only one active valid email
	MasterSalesPersonID	NO	nvarchar(50)	Parent - child link to supervising sales person. Applied when appropriate.

The data types mentioned are recommended. We can adapt to other types when needed.

Meaning of the data sources

The basic functionality requires 3 entities

- **Sales Person** – list of Sales Representatives. Possible structure in sale team can be delivered using parent – child structure.
- **Customer** – list of Customers. Each customer has its responsible Sales Representative (in Sales Person entity).
- **Sales Order** – data about orders. Each record represents order header. The values are aggregation of values in Order Line.

There are 2 more entities supporting product recommendation functionality

- **Product** – list of Products. They can be grouped into 2 level structure
- **Order Line** – lines of orders. Each record describes line of order, e.g. it contains link to product, number of units ordered, list price, and discount value. The columns Date and CustomerID are compulsory in case there is no link to Sales Order (SalesOrderID).

Cost value in both Sales order or Order line is not compulsory. Missing cost value will be calculated using agreed algorithm.