**Upsert Module**

Requirement Document

Version 1.0

Revision History

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| --- | --- | --- | --- |
| **Date** | **Version** | **Description** | **Author** |
| 21/07/22 | 1.0 | Initial Creation | Justin Pope |

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# Introduction

## Purpose

With ongoing frustrations with the implementation of the integration with SugarCRM, plans are being made to implement a module from Upsert to simplify the process and create visibility into what is happening with the import of data.

## Scope

The work that has been proposed by Upsert would add a new module to SugarCRM, create new endpoints for integration with SugarCRM, and clean up bloated objects in SugarCRM. These changes will affect how our Talend jobs sends information to SugarCRM.

## Contributors

|  |  |
| --- | --- |
| **Resource** | **Department** |
| Justin Pope [JP] | Software Developer |
| Meagan Frank [MF] | SugarCRM Project Manager |
| Cather Cheese [CC] | Application Development Manager |
| Chris Raffle [CR] | Upsert Consultant |
| Jerry Clark [JC] | Upsert Consultant |

## Definitions, Acronyms and Abbreviations

|  |  |
| --- | --- |
| **Term** | **Definition** |
| SysPro | ERP System |
| SugarCRM | CRM System |
| SQL | Structured Query Language |
| SSIS | SQL Server Integration Services |

# Overview

This is an overview for the flow of information from the SysPro Database (SysproCompany100) to SugarCRM.   
  
On the SQL Server, a Job is scheduled to run and trigger five integration processes to run:  
1) Accounts  
2) Quotes  
3) Quote Lines  
4) Orders  
5) Order Lines  
  
These processes are configured to retrieve data and store within a CSV file which is all handled within a SSIS package. The CSV files are later picked up and processed by Talend. Talend then sends the compiled information to SugarCRM via API calls.

## Current State

1. The current system is not clear when information is able to be sent or if an error occurred.
2. The current system is hard to manage as it takes extensive work for data changes.

## Future State Request

1. Upsert plans on implementing a new module improve visibility of the import processed. This will create a new API endpoints to call.
2. A new system will be able to be created to integrate with SugarCRM
   1. A new Talend job will be created that can access the SQL08 database to pull down data and then call the new API endpoint from Upsert.

# Understanding the User Environment

* Who are the users?
  + SugarCRM users
* Which additional applications do you use that we need to interface with?  
  The only applications that will be applicable to these changes are the following
  + SQL08 (SQL Server)
    - Product\_Info
    - SysproCompany100
  + Talend Jobs
* What are your expectations for usability of the product?
  + The integration will be designed to not need any user interference in standard operation. User in SugarCRM should have close to real time data with out having to get into SysPro.
* What are your expectations for training time?
  + No training time required.
* What kinds of hard copy and online documentation do you need?
  + Modification to the SugarCRM Technical Document will be needed for these changes going forward.

# Assessing the Opportunity

* Who needs this application in your organization?
  + Meagan Frank and SugarCRM users.
* How many of these types of users would use the application?
  + SugarCRM users
* How would you value a successful solution?
  + Less maintenance between SQL and Talend
  + Data between SysPro and Sugar is accurate and up to date

# Assessing Reliability, Performance, and Support Needs

* What are your expectations for reliability?
* What are your expectations for performance?
* Do you have special needs for support? What about maintenance and service access?
* What are the security requirements?

# Functional Requirements

Create a new system that would be simpler and integrate with Upsert’s new module.

## General Requirements

New Sugar integration that will use the Upsert endpoints:

* Modification of current SQL procedures and tables for Sugar data
* Rewrite Talend job

## User Interfaces

No new user interfaces are required.

## Software Interfaces

* Rewrite the Talend job to send information to sugar hitting the Upsert endpoint.
* Update SQL Procedures to reflect data to import into SugarCRM.
* Removal of obsolete applications will be done after implementation.

## Hardware Interfaces

No hardware changes

# Error Handling

# Questions and Issues

# Risks and Assumptions

# Signoff

Sign-off Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_