Logo_PUMA2Functional Specifications

CCM- Customer Contact management

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Version History

|  |  |  |
| --- | --- | --- |
| **Version** | **Date *(dd/mmm/yyyy)*** | **Modification** |
| 0.1 | 13/10/2017 | Version for ITS review. |
| 0.4 | 6/11/2017 | Merging comments from business & ITS |
| V1.0 | 22/01/2018 | Updating the Territory alignment structure based on business discussion held on the 22 nd of Jan 2018. Sections updated are :  1.9.2.4 Territory Alignment, One table structure TA\_PER\_CUSTOMER was updated. |
| V2.0 | 23/01/2018 | * Added in the “Create request” connector , on the header , the field “POTYPE” = “ZCCM” * “Requested Delivery Date” added in the create request connector. |

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# Introduction

The goal of this document is to describe the IS teams interpretation of the requirements, and describes the proposed functionality to be delivered.

The Functional Specification document describes ‘how’ the project team will be satisfying requirements for this project CCM built using Pega solutions (Pega customer engagement for life sciences)

## Related Documents

*This section identifies the documents that are useful to write this document.*

| **Doc ID** | **Title** |
| --- | --- |
| P49031\_FS\_WS21\_Admin\_Portal | Administration Portal |
|  |  |

## Glossary

*It is preferable to reference the project glossary instead of define terms and acronyms in this document. If needed, define the terms and acronyms used in this document that are not already defined in the project glossary and/or in the general glossary of PUMA.*

| **Term or Acronym** | **Definition** |
| --- | --- |
| CCM | Customer Contact Management |
| Pega.com | Cloud platform for BPM and Customer service |
| CELS | Customer Engagement For LS |
| Connector | Connector means that a request will be triggered from CCM to back end, The connectors mentioned in this document are synchronous (Mean a response should be generated by backend and transmitted to CCM real time) |
| Service | Service means that CCM will expose a service that will be listening to requests from Backend; CCM will then have to process this request and return back a response to backend. |
| LS | Life sciences |
| SSL | Secured Socket Layer |

# Solution Specifications

## General assumptions

|  |  |  |
| --- | --- | --- |
| # | Category | Description |
|  | Data Privacy | Pega CCM is not supposed to store any private data of customer or external partners. It’s the responsibility of external system to make sure such details are not transferred to Pega CCM. |

## Tables in CCM

The tables described below are maintained in CCM by a system admin. The data in those tables are not retrieved from any external system; they should be initiated for CCM rollout.

### [Table in CCM] Source system codes

CCM will get the customers master data from several SAP systems (Only 1 interface from CCM side. the customer data will mention the source system), CCM should maintain a table with source systems.

#### Core

This table will be maintained at Core level.

Table structure:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Column Name | Column Type | Column Length | Description |
|  | System Code **(Key)** | Text | 64 | Unique code for a system regardless of the country |
|  | Description | Text | 200 | Description of the system |

Table Values:

|  |  |
| --- | --- |
| **System Code Backend (Key)** | **Label** |
| **CEP** | CEP System |
| **SHIFT** | SHIFT |

### [Table in CCM] Language codes

On every request sent to backend, CCM will include the language code of the operator in CCM; this language code will drive the language of the labels returned by SAP. A table in CCM will be created to hold the codes of languages.

#### Core

The language codes used by CCM are listed in this table:

Table structure:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Column Name | Column Type | Column Length | Description |
|  | Language Code CCM **(Key)** | Text | 8 | Language code as used by Pega CCM. |
|  | Language Label | Text | 64 | Language Label |
|  | Country code | Text | 2 | Country code ISO 2 characters |
|  | Country Label | Text | 64 | Country Label |
|  | Language Code backend | Text | 2 | Language code as used by backend SAP systems |
|  | Currency Code | Text | 3 | The currency ISO code of 3 characters. |
|  | Currency label | Text | 64 | Currency Label |

Table Values:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Langauge Code CCM | Language Label | Country code | Country Label | Langauge code backend | Currency code | Currency Label |
| af-ZA | Afrikaans - South Africa | ZA | South Africa | ZA |  |  |
| sq-AL | Albanian – Albania | AL | Albania | AL |  |  |
| ar-DZ | Arabic – Algeria | DZ | Algeria | DZ |  |  |
| ar-BH | Arabic – Bahrain | BH | Bahrain | BH |  |  |
| ar-EG | Arabic – Egypt | EG | Egypt | EG |  |  |
| ar-IQ | Arabic – Iraq | IQ | Iraq | IQ |  |  |
| ar-JO | Arabic – Jordan | JO | Jordan | JO |  |  |
| ar-KW | Arabic - Kuwait | KW | Kuwait | KW |  |  |
| ar-LB | Arabic - Lebanon | LB | Lebanon | LB |  |  |
| ar-LY | Arabic - Libya | LY | Libya | LY |  |  |
| ar-MA | Arabic - Morocco | MA | Morocco | MA |  |  |
| ar-OM | Arabic - Oman | OM | Oman | OM |  |  |
| ar-QA | Arabic - Qatar | QA | Qatar | QA |  |  |
| ar-SA | Arabic - Saudi Arabia | SA | Saudi Arabia | SA |  |  |
| ar-SY | Arabic - Syria | SY | Syria | SY |  |  |
| ar-TN | Arabic - Tunisia | TN | Tunisia | TN |  |  |
| ar-AE | Arabic - United Arab Emirates | AE | United Arab Emirate | AE |  |  |
| ar-YE | Arabic - Yemen | YE | Yemen | YE |  |  |
| hy-AM | Armenian - Armenia | AM | Armenia | AM |  |  |
| Cy-az-AZ | Azeri (Cyrillic) - Azerbaijan | AZ | Azerbaijan | AZ |  |  |
| Lt-az-AZ | Azeri (Latin) - Azerbaijan | AZ | Azerbaijan | AZ |  |  |
| eu-ES | Basque - Basque | ES | Basque | ES |  |  |
| be-BY | Belarusian - Belarus | BY | Belarus | BY |  |  |
| bg-BG | Bulgarian - Bulgaria | BG | Bulgaria | BG |  |  |
| ca-ES | Catalan - Catalan | ES | Catalan | ES |  |  |
| zh-CN | Chinese - China | CN | China | ZH |  |  |
| zh-HK | Chinese - Hong Kong SAR | HK | Hong Kong SAR | ZH |  |  |
| zh-MO | Chinese - Macau SAR | MO | Macau SAR | ZH |  |  |
| zh-SG | Chinese - Singapore | SG | Singapore | ZH |  |  |
| zh-TW | Chinese - Taiwan | TW | Taiwan | ZH |  |  |
| hr-HR | Croatian - Croatia | HR | Croatia | HR |  |  |
| cs-CZ | Czech - Czech Republic | CZ | Czech Republic | CZ |  |  |
| da-DK | Danish - Denmark | DK | Denmark | DK |  |  |
| div-MV | Dhivehi - Maldives | MV | Maldives | MV |  |  |
| nl-BE | Dutch - Belgium | BE | Belgium | BE |  |  |
| nl-NL | Dutch - The Netherlands | NL | The Netherlands | NL |  |  |
| en-AU | English - Australia | AU | Australia | AU |  |  |
| en-BZ | English - Belize | BZ | Belize | BZ |  |  |
| en-CA | English - Canada | CA | Canada | CA |  |  |
| en-CB | English - Caribbean | CB | Caribbean | CB |  |  |
| en-IE | English - Ireland | IE | Ireland | IE |  |  |
| en-JM | English - Jamaica | JM | Jamaica | JM |  |  |
| en-NZ | English - New Zealand | NZ | New Zealand | NZ |  |  |
| en-PH | English - Philippines | PH | Philippines | PH |  |  |
| en-ZA | English - South Africa | ZA | South Africa | ZA |  |  |
| en-TT | English - Trinidad and Tobago | TT | Trinidad and Tobago | TT |  |  |
| en-GB | English - United Kingdom | GB | United Kingdom | GB |  |  |
| en-US | English - United States | US | United States | US |  |  |
| en-ZW | English - Zimbabwe | ZW | Zimbabwe | ZW |  |  |
| et-EE | Estonian - Estonia | EE | Estonia | EE |  |  |
| fo-FO | Faroese - Faroe Islands | FO | Faroe Islands | FO |  |  |
| fa-IR | Farsi - Iran | IR | Iran | IR |  |  |
| fi-FI | Finnish - Finland | FI | Finland | FI |  |  |
| fr-BE | French - Belgium | BE | Belgium | BE |  |  |
| fr-CA | French - Canada | CA | Canada | CA |  |  |
| fr-FR | French - France | FR | France | FR |  |  |
| fr-LU | French - Luxembourg | LU | Luxembourg | LU |  |  |
| fr-MC | French - Monaco | MC | Monaco | MC |  |  |
| fr-CH | French - Switzerland | CH | Switzerland | CH |  |  |
| gl-ES | Galician - Galician | ES | Galician | ES |  |  |
| ka-GE | Georgian - Georgia | GE | Georgia | GE |  |  |
| de-AT | German - Austria | AT | Austria | AT |  |  |
| de-DE | German - Germany | DE | Germany | DE |  |  |
| de-LI | German - Liechtenstein | LI | Liechtenstein | LI |  |  |
| de-LU | German - Luxembourg | LU | Luxembourg | LU |  |  |
| de-CH | German - Switzerland | CH | Switzerland | CH |  |  |
| el-GR | Greek - Greece | GR | Greece | GR |  |  |
| gu-IN | Gujarati - India | IN | India | IN |  |  |
| he-IL | Hebrew - Israel | IL | Israel | IL |  |  |
| hi-IN | Hindi - India | IN | India | IN |  |  |
| hu-HU | Hungarian - Hungary | HU | Hungary | HU |  |  |
| is-IS | Icelandic - Iceland | IS | Iceland | IS |  |  |
| id-ID | Indonesian - Indonesia | ID | Indonesia | ID |  |  |
| it-IT | Italian - Italy | IT | Italy | IT |  |  |
| it-CH | Italian - Switzerland | CH | Switzerland | CH |  |  |
| ja-JP | Japanese - Japan | JP | Japan | JP |  |  |
| kn-IN | Kannada - India | IN | India | IN |  |  |
| kk-KZ | Kazakh - Kazakhstan | KZ | Kazakhstan | KZ |  |  |
| kok-IN | Konkani - India | IN | India | -IN |  |  |
| ko-KR | Korean - Korea | KR | Korea | KO |  |  |
| ky-KZ | Kyrgyz - Kazakhstan | KZ | Kazakhstan | KZ |  |  |
| lv-LV | Latvian - Latvia | LV | Latvia | LV |  |  |
| lt-LT | Lithuanian - Lithuania | LT | Lithuania | LT |  |  |
| mk-MK | Macedonian (FYROM) | MK | Macedonia | MK |  |  |
| ms-BN | Malay - Brunei | BN | Brunei | BN |  |  |
| ms-MY | Malay - Malaysia | MY | Malaysia | MY |  |  |
| mr-IN | Marathi - India | IN | India | IN |  |  |
| mn-MN | Mongolian - Mongolia | MN | Mongolia | MN |  |  |
| nb-NO | Norwegian (Bokmål) - Norway | NO | Norway | NO |  |  |
| nn-NO | Norwegian (Nynorsk) - Norway | NO | Norway | NO |  |  |
| pl-PL | Polish - Poland | PL | Poland | PL |  |  |
| pt-BR | Portuguese - Brazil | BR | Brazil | BR |  |  |
| pt-PT | Portuguese - Portugal | PT | Portugal | PT |  |  |
| pa-IN | Punjabi - India | IN | India | IN |  |  |
| ro-RO | Romanian - Romania | RO | Romania | RO |  |  |
| ru-RU | Russian - Russia | RU | Russia | RU |  |  |
| sa-IN | Sanskrit - India | IN | India | IN |  |  |
| sk-SK | Slovak - Slovakia | SK | Slovakia |  |  |  |
| sl-SI | Slovenian - Slovenia | SI | Slovenia | SL |  |  |
| es-AR | Spanish - Argentina | AR | Argentina | AR |  |  |
| es-BO | Spanish - Bolivia | BO | Bolivia | BO |  |  |
| es-CL | Spanish - Chile | CL | Chile | CL |  |  |
| es-CO | Spanish - Colombia | CO | Colombia | CO |  |  |
| es-CR | Spanish - Costa Rica | CR | Costa Rica | CR |  |  |
| es-DO | Spanish - Dominican Republic | DO | Dominican Republic | DO |  |  |
| es-EC | Spanish - Ecuador | EC | Ecuador | EC |  |  |
| es-SV | Spanish - El Salvador | SV | El Salvador | SV |  |  |
| es-GT | Spanish - Guatemala | GT | Guatemala | GT |  |  |
| es-HN | Spanish - Honduras | HN | Honduras | HN |  |  |
| es-MX | Spanish - Mexico | MX | Mexico | MX |  |  |
| es-NI | Spanish - Nicaragua | NI | Nicaragua | NI |  |  |
| es-PA | Spanish - Panama | PA | Panama | PA |  |  |
| es-PY | Spanish - Paraguay | PY | Paraguay | PY |  |  |
| es-PE | Spanish - Peru | PE | Peru | PE |  |  |
| es-PR | Spanish - Puerto Rico | PR | Puerto Rico | PR |  |  |
| es-ES | Spanish - Spain | ES | Spain | ES |  |  |
| es-UY | Spanish - Uruguay | UY | Uruguay | UY |  |  |
| es-VE | Spanish - Venezuela | VE | Venezuela | VE |  |  |
| sw-KE | Swahili - Kenya | KE | Kenya | KE |  |  |
| sv-FI | Swedish - Finland | FI | Finland | FI |  |  |
| sv-SE | Swedish - Sweden | SE | Sweden | SE |  |  |
| syr-SY | Syriac - Syria | SY | Syria | SY |  |  |
| ta-IN | Tamil - India | IN | India | IN |  |  |
| tt-RU | Tatar - Russia | RU | Russia | RU |  |  |
| te-IN | Telugu - India | IN | India | IN |  |  |
| th-TH | Thai - Thailand | TH | Thailand | TH |  |  |
| tr-TR | Turkish - Turkey | TR | Turkey | TR |  |  |
| uk-UA | Ukrainian - Ukraine | UA | Ukraine | UA |  |  |
| ur-PK | Urdu - Pakistan | PK | Pakistan | PK |  |  |
| Cy-uz-UZ | Uzbek (Cyrillic) - Uzbekistan | uz-UZ | Uzbekistan | uz-UZ |  |  |
| Lt-uz-UZ | Uzbek (Latin) - Uzbekistan | uz-UZ | Uzbekistan | uz-UZ |  |  |
| vi-VN | Vietnamese - Vietnam | VN | Vietnam | VN |  |  |

### [Table in CCM] Storage Location

Storage location table is maintained in CCM without any interface to backend. This table will be defined at country level. This information is updated very rarely in backend. In case this information is updated in backend, end users will have to create a request to master data team in order to update the table in CCM.

Storage location is needed to create an order (at item level). It will be used for return order creation, and corresponds to the location where the stock will be directed within the warehouse. Some countries populate it automatically through a business rule implemented in backend. Others (ex: SWI) fill it manually every time.

#### Core

This table will contain the following columns:

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Type** | **Length** | **Description** |
| **Source system (Key)** | Text | 64 | Source system of the customer |
| **Sales Organization(Key)** | Text | 4 | Sales Organization |
| **Plant Code(Key)** | Text | 4 | Plant Code |
| **Storage Location (Key)** | Text | 4 | Storage location key |
| **Country Code (Key)** | Text | 3 | ISO code 2 characters of the country |
| **Storage Location label** | Text | 16 | Storage location label (Following the Language code) |
| **Full Address** | Text | 35 | Full Address in the Label of the Full address. |
| **Language** | Text | 2 | The language codes are defined in the table “Language Codes”. |

### [Table in CCM] Carrier details

This table is maintained in Pega CCM without any automatic feed from any external system.

In the context of a “Physical return” process in CCM, the agent will need to get details about the carrier to be able to send correspondences (Email or eFax).

#### Core

A table in CCM will be maintained, this table will hold the details of the carriers per country and sales area. This table is at Core level.

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Type** | **Length** | **Description** |
| **Country Code (Key)** | Text | 3 | Code of the country using this carrier details (ISO Code 2 characters) |
| **Carrier code (Key)** | Text | 10 | This code should be aligned with the Vendor code in SAP. App Admin operator will have to make sure codes are aligned. |
| **Carrier Name** | Text | 40 | Carrier name |
| **Carrier Address** | Text | 40 | Address including street, number. |
| **Carrier Postal code** | Text | 10 | As some Postal code could have alphanumeric values. |
| **Carrier City** | Text | 40 | City text |
| **Carrier Country** | Text | 3 | ISO code country code (2 characters) |

##### Carrier contacts

This table will define for each carrier its related contacts.

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Type** | **Length** | **Description** |
| **Contact Id (Key)** | Text |  | Contact ID maintained in CCM. |
| **Carrier code (Key)** | Text | 10 | Carrier code from carrier table |
| **Sales Organization (Key)** | Text | 4 | Sales Organization Code |
| **Country Code (Key)** | Text | 3 | Country ISO Code 2 characters |
| **Name** | Text | 40 | Carrier name |
| **Phone** | Text | 30 | Carrier Phone |
| **Email** | Text | 241 | Carrier email |

### [Table in CCM] Distribution centers

The distribution centers are maintained in Pega CCM, this table will hold the details of the distribution centers per country. This table is at the core level.

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Type** | **Length** | **Description** |
| **Country Code (Key)** | Text | 3 | Code of the country using this carrier details (ISO Code 2 characters) |
| **Code (Key)** | Text | 4 | This code should be aligned with the Vendor code in SAP. App Admin operator will have to make sure codes are aligned. |
| **Center name** | Text | 40 | Carrier name |
| **Center Address** | Text | 40 | Address including street, number. |
| **Center Postal code** | Text | 10 | As some Postal code could have alphanumeric values. |
| **Center City** | Text | 40 | City text |
| **Center Country** | Text | 3 | ISO code country code (2 characters) |

### [Table in CCM] Sales Organization, Distribution and sales Division

Pega CCM will have to reference the sales organizations, Distribution channels and Divisions when sending requests to backend (SAP); this data is also used when capturing details to initiate the creation of a customer.

The table below will be maintained in Pega CCM and managed by an App Admin. Those tables should be manually initiated by an App Admin.

#### Sales Organization

|  |  |  |  |
| --- | --- | --- | --- |
| ***Field in CCM*** | ***Type*** | ***Length*** | ***Description*** |
| **Source System (Key)** | Text  (Required) | 10 | Source system (CEP, IS2000, SHIFT…) |
| **Sales Organization code(Key)** | text | 4 | Sales Org Code |
| **Country Code (Key)** | text | 3 | We should have the country code ISO Code 2 characters. |
| **Sales Organization label** | text | 20 | Label |

#### Sales Division

|  |  |  |  |
| --- | --- | --- | --- |
| ***Field in CCM*** | ***Type*** | ***Length*** | ***Description*** |
| **Source System (Key)** | Text  (Required) | 10 | Source system (CEP, IS2000, SHIFT…) |
| **Sales Division Code(Key)** | text | 2 | Division code |
| **Country Code (Key)** | text | 3 | We should have the country code ISO Code 2 characters. |
| **Sales Division Label** | text | 20 | Label |

#### Distribution Channel

|  |  |  |  |
| --- | --- | --- | --- |
| ***Field in CCM*** | ***Type*** | ***Length*** | ***Description*** |
| **Source System (Key)** | Text  (Required) | 10 | Source system (CEP, IS2000, SHIFT…) |
| **Distribution channel Code(Key)** | text | 2 | Distribution channel code. |
| **Country Code (Key)** | text | 3 | We should have the country code ISO Code 2 characters. |
| **Distribution channel Label** | text | 20 | Label |

### [Table in CCM] Order type mapping table

Order types codes are maintained in Pega CCM, this table will be initiated by different order types codes from source systems, The App admin will have to manage adding new codes and label for future countries to rollout. The keys of this table are:

* Source system.
* Country code
* Language code.
* Backend code

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Label | Type | Length | Description |
|  | Source System (Key) | Text | 10 | Source system code, Name of the SAP system. |
|  | Country code (Key) | Text | 3 | Country code ISO code 2 characters. |
|  | Language Code (Key) | Text | 2 | The Language ISO Code 2 characters. |
|  | Backend Code(Key) | Text | 4 | Backend code (like YRE) |
|  | Backend Label | Text | 20 | The Backend Label |
|  | CCM Type | Text | 64 | CCM recognized a number of types , The App Admin should associate the Backend code with those CCM types, possible values in this field are:   * CREDIT\_NOTE * DEBIT\_NOTE * STANDARD\_ORDER * FREE\_OF\_CHARGE\_REPLACEMENT * RETURN\_PHYSICAL * RETURN\_PHYSICAL\_WITHOUT\_CREDIT * RETURN\_N\_PHYSICAL * REPLACEMENT * EXTERNAL\_DESTRUCTION * EXPIRED\_PRODUCT |

Here below the mapping tables between CCM types (used in each process) and the order types codes on different backend systems.

CEP Label are for: Language code = fr-FR and Country code = FR

SHIFT labels are for: Language code = en-US and Country code = FR

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| CCM TYPE | CEP CODE | CEP LABEL | SHIFT CODE | SHIFT LABEL |
| CREDIT\_NOTE | YRCR | Demande note crédit | ZCR | Credit Note |
| CREDIT\_NOTE | YCMR | Dde note credit qté |  |  |
| CREDIT\_NOTE | YVCR | Dde note crédit Val |  |  |
| DEBIT\_NOTE | YDMR | Dde note debit qté | ZDR | Debit Note |
| DEBIT\_NOTE | YRDR | Demande note débit |  |  |
| DEBIT\_NOTE | YVDR | Dde note débit Val |  |  |
| STANDARD\_ORDER | YOR | Cde client standard | ZOR  Or ZSAM Or  ZTO  Or  ZPRE | Standard order  Samples/Promotional Order  Transfer Order  Presales order |
| FREE\_OF\_CHARGE\_REPLACEMENT | YFOC | Commande gratuite | ZFOC | FOC Replacement |
| RETURN\_PHYSICAL | YRE | Retours | ZRE or ZSAR  ZREA  ZREB | Return order Or Sample Returns  Advanced Returns  Adv.UnplannedReturns |
| RETURN\_PHYSICAL | YRPS | Retour psychotrope |  |  |
| RETURN\_PHYSICAL\_WITHOUT\_CREDIT | YRE | Retours | ZRE or ZSAR  ZREA  ZREB | Return order Or Sample Returns  Advanced Returns  Adv.UnplannedReturns |
| RETURN\_N\_PHYSICAL | YCMR | Dde note crédit qte. | ZRE or ZSAR  ZREA  ZREB | Return order Or Sample Returns  Advanced Returns  Adv.UnplannedReturns |
| REPLACEMENT | YOR | Cde client standard | ZOR  Or ZSAM Or  ZTO  Or  ZPRE | Standard order  Samples/Promotional Order  Transfer Order  Presales order |
| EXTERNAL\_DESTRUCTION | YCMR | Dde note credit qté | ZRE or ZSAR  ZREA  ZREB | Return order Or Sample Returns  Advanced Returns  Adv.UnplannedReturns |
| EXPIRED\_PRODUCT | YRE | Retours | ZRE or ZSAR  ZREA  ZREB | Return order Or Sample Returns  Advanced Returns  Adv.UnplannedReturns |

The table above will be represented in Pega CCM with the structure below:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| CCM Type | Source System | Country code | Language Code | Backend Code | Backend Label | Active (Boolean) |
|  | CEP/SHIFT |  | fr-FR/en-US |  |  | True/False |

Here is the full list of order types as given by SHIFT Team, Not all of them were included in the table above because not all of them are relevant to Pega CCM.

### [Table in CCM] Order reason mapping table

Pega CCM will display to end users a list of order reasons; The order reason is driven by level 4 and level 5 of the classification matrix. This table will keep the order reason codes used the table below will store the order reasons used in Pega CCM:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Label | Type | Length | Description |
|  | UniqueID |  |  | Id generated by Pega CCM |
|  | Source System | Text | 10 | Source system |
|  | Country code | Text | 3 | Country code ISO code 2 characters. |
|  | Language Code | Text | 2 | The Language ISO Code 2 characters. |
|  | L5 | Text | 64 | Classification level 5 as defined in Pega CCM classification table |
|  | Backend Code | Text | 3 | Backend code |
|  | Backend Label | Text | 40 | Backend label |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ID | Source System | Country code | Language Code | L5 | | Backend  Code | | Backend Label | |
|  | CEP | FR | fr-FR | Customer Error | | ZEC | | Erreur client | |
|  | CEP | FR | fr-FR | Processing Error CS | | ZAC | | Erreur saisie article Service Client | |
|  | CEP | FR | fr-FR | Processing Error CS | | ZCC | | Erreur saisie code client Service Client | |
|  | CEP | FR | fr-FR | Processing Error CS | | ZDC | | Erreur saisie date livraison Service Cli | |
|  | CEP | FR | fr-FR | Processing Error Sales Rep | | ZAR | | Erreur saisie article Réseau | |
|  | CEP | FR | fr-FR | Processing Error Sales Rep | | ZCR | | Erreur saisie code client Réseau | |
|  | CEP | FR | fr-FR | Processing Error Sales Rep | | ZDR | | Erreur saisie date livraison Réseau | |
|  | CEP | FR | fr-FR | Processing Error Sales Rep | | ZQR | | Erreur saisie de quantité Réseau | |
|  | CEP | FR | fr-FR | Processing Error Sales Rep | | ZCH | | Changement de titulaire | |
|  | CEP | FR | fr-FR | Processing Error Telesales | | ZAT | | Erreur saisie article Télévente | |
|  | CEP | FR | fr-FR | Processing Error Telesales | | ZCT | | Erreur saisie code client Télévente | |
|  | CEP | FR | fr-FR | Processing Error Telesales | | ZDT | | Erreur saisie date livraison Télévente | |
|  | CEP | FR | fr-FR | Processing Error Telesales | | ZQT | | Erreur saisie de quantité Télévente | |
|  | CEP | FR | fr-FR | Deficient Packaging - Paletization | | Z12 | | Présentation non conforme (Magasin) | |
|  | CEP | FR | fr-FR | Wrong Quantity | | Z1D | | Livraison déficitaire Détail (MAG) | |
|  | CEP | FR | fr-FR | Wrong Quantity | | Z9D | | Livraison excédentaire Détail (MAG) | |
|  | CEP | FR | fr-FR | Wrong Quantity | | Z34 | | Colis abimé signalé sur RA (MAG) | |
|  | CEP | FR | fr-FR | Wrong Quantity | | Z39 | | Erreur palettisation (Magasin) | |
|  | CEP | FR | fr-FR | Wrong Product | | Z8D | | Inversion pdt dans colis Détail (MAG) | |
|  | CEP | FR | fr-FR | Labelling Error | | Z13 | | Pb étiq/Mauvais transporteur (Magasin) | |
|  | CEP | FR | fr-FR | Short remaining shelf life | | Z11 | | Pdt livré péremption/DLV non conf. (MAG) | |
|  | CEP | FR | fr-FR | Temperature excursion | | ZQP | | Excursion de température (qualité) | |
|  | CEP | FR | fr-FR | Damaged Product / Package | | Z16 | | Colis abimé sign RE | |
|  | CEP | FR | fr-FR | Damaged Product / Package | | ZMG | | colis abimé ou manquant sign RE sans RA | |
|  | CEP | FR | fr-FR | Wrong Quantity | | Z36 | | Erreur adresse livr./colis perdu (TRP) | |
|  | CEP | FR | fr-FR | Wrong Quantity | | ZOL | | Manquant produit colis ouvert sign /RE | |
|  | CEP | FR | fr-FR | Wrong Product | | Z18 | | Erreur adresse livr./colis dévoyé (TRP) | |
|  | CEP | FR | fr-FR | Wrong Product | | Z74 | | Retour colis non présenté (TRP) | |
|  | CEP | FR | fr-FR | Wrong Product | | ZMG | | colis abimé ou manquant sign RE sans RA | |
|  | CEP | FR | fr-FR | Expired Product | | Z41 | | FR SAF Destruction Périmés - Client | |
|  | CEP | FR | fr-FR | Expired Product | | Z42 | | FR SAF Destruction Périmés - VRP | |
|  | CEP | FR | fr-FR | Return Agreed by Trade | | ZOK | | Périmés / Echanges / Reprises | |
|  | CEP | FR | fr-FR | Seasonal products | | Z28 | | Retour de commande de mise en place | |
|  | CEP | FR | fr-FR | Customer Error | | ZRC | | Refus client | |
|  | CEP | FR | fr-FR | | ZRD | |  | |
|  | CEP | FR | fr-FR | | ZRR | |  | |
|  | CEP | FR | fr-FR | Processing Error CS | | ZAC | | Erreur saisie article Service Client | |
|  | CEP | FR | fr-FR | Processing Error CS | | ZCC | | Erreur saisie code client Service Client | |
|  | CEP | FR | fr-FR | Processing Error CS | | ZDC | | Erreur saisie date livraison Service Cli | |
|  | CEP | FR | fr-FR | Processing Error CS | | ZQC | | Erreur saisie de quantité Service Client | |
|  | CEP | FR | fr-FR | Processing Error Sales Rep | | ZAR | | Erreur saisie article Réseau | |
|  | CEP | FR | fr-FR | Processing Error Sales Rep | | ZCR | | Erreur saisie code client Réseau | |
|  | CEP | FR | fr-FR | Processing Error Sales Rep | | ZDR | | Erreur saisie date livraison Réseau | |
|  | CEP | FR | fr-FR | Processing Error Telesales | | ZAT | | Erreur saisie article Télévente | |
|  | CEP | FR | fr-FR | Processing Error Telesales | | ZCT | | Erreur saisie code client Télévente | |
|  | CEP | FR | fr-FR | Processing Error Telesales | | ZDT | | Erreur saisie date livraison Télévente | |
|  | CEP | FR | fr-FR | Labelling Error | | ZA | | #N/A | |
|  | CEP | FR | fr-FR | Deficient Packaging | | Z1D | | Livraison déficitaire Détail (MAG) | |
|  | CEP | FR | fr-FR | Deficient Packaging | | Z9D | | Livraison excédentaire Détail (MAG) | |
|  | CEP | FR | fr-FR | Deficient Packaging | | ZPM | | Présentation non conforme sans enquête | |
|  | CEP | FR | fr-FR | Deficient Packaging | | Z12 | | Présentation non conforme (Magasin) | |
|  | CEP | FR | fr-FR | Deficient Packaging | | Z9S | | Livraison excédentaire Standard (MAG) | |
|  | CEP | FR | fr-FR | Wrong Quantity | | Z8D | | Inversion pdt dans colis Détail (MAG) | |
|  | CEP | FR | fr-FR | Wrong Quantity | | Z8S | | Inversion de colis standard | |
|  | CEP | FR | fr-FR | Short remaining shelf life | | Z11 | | Pdt livré péremption/DLV non conf. (MAG) | |
|  | CEP | FR | fr-FR | Early / Late preparation | | ZPA | | Préparation anticipée | |
|  | CEP | FR | fr-FR | Early / Late preparation | | ZRP | | Retard de préparation | |
|  | CEP | FR | fr-FR | Lost in Transit | | Z36 | | Erreur adresse livr./colis perdu (TRP) | |
|  | CEP | FR | fr-FR | Theft-Missing product | | ZOL | | Manquant produit colis ouvert sign /RE | |
|  | CEP | FR | fr-FR | Temperature excursion | | ZQP | | Excursion de température (qualité) | |
|  | CEP | FR | fr-FR | Damaged Product-Package | | Z30 | | Cde refusée/colis abimé sign sur RE (TRP | |
|  | CEP | FR | fr-FR | Wrong Delivery Time | | Z17 | | Colis refusé (Retard de livraison TRP) | |
|  | CEP | FR | fr-FR | Wrong Delivery Time | | Z35 | | Retard livraison (appel client > 48h) | |
|  | CEP | FR | fr-FR | Wrong Quantity | | Z36 | | Erreur adresse livr./colis perdu (TRP) | |
|  | CEP | FR | fr-FR | Wrong Quantity | | ZOL | | Manquant produit colis ouvert sign /RE | |
|  | CEP | FR | fr-FR | Wrong Product | | Z36 | | Erreur adresse livr./colis perdu (TRP) | |
|  | CEP | FR | fr-FR | Wrong Product | | ZOL | | Manquant produit colis ouvert sign /RE | |
|  | CEP | FR | fr-FR | Product Recall | | Z24 | | Retrait de marché | |
|  | CEP | FR | fr-FR | Product Technical Complaint | | Z19 | | Défaut Qualité produit | |
|  | CEP | FR | fr-FR | No Customer Contract records | | Z25 | | Conditions commerciales | |
|  | CEP | FR | fr-FR | No Customer Contract records | | Z26 | | Réajustement commercial | |
|  | CEP | FR | fr-FR | No Customer Contract records | | ZOH | | Promesses remise | |
|  | CEP | FR | fr-FR | Error on existing customer contracts | | ZDB | | Litige données de base | |
|  | CEP | FR | fr-FR | No Discount records | | YE4 | | Application retroactive Remise client | |
|  | CEP | FR | fr-FR | Error on list price or discounts | | ZOG | | Remises Groupement | |
|  | CEP | FR | fr-FR | Error on list price or discounts | | ZOH | | Promesses remise | |
|  | CEP | FR | fr-FR | Error on list price or discounts | | ZQA | | Erreur prix marché | |
|  | CEP | FR | fr-FR | Error on list price or discounts | | YE4 | | Application retroactive Remise client | |
|  | CEP | FR | fr-FR | Customer MD Errors | | ZDB | | Litige données de base | |
|  | SHIFT | FR | en-US | Order Entry - Customer Error | | R01 | | Order Entry - Customer Error | |
|  | SHIFT | FR | en-US | Order Entry - Processing Error CS | | R02 | | Order Entry - Processing Error CS | |
|  | SHIFT | FR | en-US | Order Entry - Processing Error Sales Rep | | R03 | | Order Entry - Processing Error Sales Rep | |
|  | SHIFT | FR | en-US | Order Entry - Processing Error Telesales | | R04 | | Order Entry - Processing Error Telesales | |
|  | SHIFT | FR | en-US | DC - Deficient Packaging - Paletization | | R05 | | DC - Deficient Packaging - Paletization | |
|  | SHIFT | FR | en-US | DC - Wrong Quantity | | R06 | | DC - Wrong Quantity | |
|  | SHIFT | FR | en-US | DC - Wrong Product | | R07 | | DC - Wrong Product | |
|  | SHIFT | FR | en-US | DC - Labelling Error | | R08 | | DC - Labelling Error | |
|  | SHIFT | FR | en-US | DC - Short remaining shelf life | | R09 | | DC - Short remaining shelf life | |
|  | SHIFT | FR | en-US | DC - Wrong address / customer | | R10 | | DC - Wrong address / customer | |
|  | SHIFT | FR | en-US | DC - Delivery document missing | | R11 | | DC - Delivery document missing | |
|  | SHIFT | FR | en-US | Delivery - Temperature excursion | | R12 | | Delivery - Temperature excursion | |
|  | SHIFT | FR | en-US | Delivery - Damaged Product / Package | | R13 | | Delivery - Damaged Product / Package | |
|  | SHIFT | FR | en-US | Delivery - Wrong Quantity | | R14 | | Delivery - Wrong Quantity | |
|  | SHIFT | FR | en-US | Delivery - Wrong Product | | R15 | | Delivery - Wrong Product | |
|  | SHIFT | FR | en-US | Commercial - Expired Product | | R16 | | Commercial - Expired Product | |
|  | SHIFT | FR | en-US | Commercial -Agreed by Trade | | R17 | | Commercial -Agreed by Trade | |
|  | SHIFT | FR | en-US | Commercial -Seasonal products | | R18 | | Commercial -Seasonal products | |
|  | SHIFT | FR | en-US | Commercial -Product Lifecycle phaseout | | R19 | | Commercial -Product Lifecycle phaseout | |
|  | SHIFT | FR | en-US | Local Regulatory reason | | R20 | | Local Regulatory reason | |
|  | SHIFT | FR | en-US | Business Decision | | R21 | | Business Decision | |
|  | SHIFT | FR | en-US | Product Recall | | PR1 | | Product Recall | |
|  | SHIFT | FR | en-US | PTC - Product Technical Complaint | | Q01 | | PTC - Product Technical Complaint | |
|  | SHIFT | FR | en-US | Quality - Plant - Standard Missing | | Q02 | | Quality - Plant - Standard Missing | |
|  | SHIFT | FR | en-US | Quality - Plant - Packaging Defect | | Q03 | | Quality - Plant - Packaging Defect | |
|  | SHIFT | FR | en-US | Refusal-Order -Customer Error | | F01 | | Refusal-Order -Customer Error | |
|  | SHIFT | FR | en-US | Refusal-Order -Processing Error CS | | F02 | | Refusal-Order -Processing Error CS | |
|  | SHIFT | FR | en-US | Refusal-Order-Processing Error Sales Rep | | F03 | | Refusal-Order-Processing Error Sales Rep | |
|  | SHIFT | FR | en-US | Refusal-Order-Processing Error Telesales | | F04 | | Refusal-Order-Processing Error Telesales | |
|  | SHIFT | FR | en-US | Refusal- DC - Labelling Error | | F05 | | Refusal- DC - Labelling Error | |
|  | SHIFT | FR | en-US | Refusal- DC - Deficient Packaging | | F06 | | Refusal- DC - Deficient Packaging | |
|  | SHIFT | FR | en-US | Refusal- DC - Wrong Quantity | | F07 | | Refusal- DC - Wrong Quantity | |
|  | SHIFT | FR | en-US | Refusal- DC - Wrong Product | | F08 | | Refusal- DC - Wrong Product | |
|  | SHIFT | FR | en-US | Refusal- DC - Damaged Product in DC | | F09 | | Refusal- DC - Damaged Product in DC | |

### [Table in CCM] Rejection reasons in CCM

Rejection reasons are used by the agents to set up a valid value of the rejection in backend; the possible values are maintained in this table.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Label | Type | Length | Description |
|  | Source System (Key) | Text | 10 | Source system code, Name of the SAP system. |
|  | Country code (Key) | Text | 3 | Country code ISO code 2 characters. |
|  | Language Code (Key) | Text | 2 | The Language ISO Code 2 characters. |
|  | Backend Code(Key) | Text | 2 | Backend code |
|  | Backend Label | Text | 40 | The Backend Label |

Values of this table are:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Source system (Key) | Country code (Key) | Language Code  (Key) | Backend Code (Key) | Backend Label |
| CEP | **FR** | fr-FR | Y4 | Refus note de crédit/débit |
| CEP | **FR** | fr-FR | TBD | Retour contradictoire |
| CEP | **CORE** | en-US | 01 | Delivery date too late |
| CEP | **CORE** | en-US | 02 | Poor quality |
| CEP | **CORE** | en-US | 03 | Too expensive |
| CEP | **CORE** | en-US | 04 | Competitor better |
| CEP | **CORE** | en-US | 05 | Guarantee |
| CEP | **CORE** | en-US | 10 | Unreasonable request |
| CEP | **CORE** | en-US | 11 | Cust.to receive replacement |
| CEP | **CORE** | en-US | 50 | Transaction is being checked |
| CEP | **CORE** | en-US | 72 | Credit Limit exceeded |
| CEP | **CORE** | en-US | Y0 | Customer Service Error - no billing req. |
| CEP | **CORE** | en-US | Y1 | Credit Limit exceeded |
| CEP | **CORE** | en-US | Y2 | Cancelled due to wrong currency |
| CEP | **CORE** | en-US | Y3 | Keying error |
| CEP | **CORE** | en-US | Y4 | Incorrect error |
| CEP | **CORE** | en-US | Y5 | Customer error |
| CEP | **CORE** | en-US | Y6 | Expiry date too short |
| CEP | **CORE** | en-US | Y7 | Customer request |
| CEP | **CORE** | en-US | Y8 | System error |
| CEP | **CORE** | en-US | Y9 | Pricing error |
| CEP | **CORE** | en-US | YA | Duplicated order |
| CEP | **CORE** | en-US | YB | Not to follow line |
| CEP | **CORE** | en-US | YC | Rejected due to stock shortage |
| CEP | **CORE** | en-US | YD | Rejected due to quota |
| CEP | **CORE** | en-US | YE | Tender not attended |
| CEP | **CORE** | en-US | YF | Tender lost |
| CEP | **CORE** | en-US | YG | Tender canceled |
| CEP | **CORE** | en-US | YH | Tender - given from wholesaler stock |
| CEP | **CORE** | en-US | YI | Backorders No Longer Required |
| CEP | **CORE** | en-US | YJ | No backorders allowed |
| CEP | **CORE** | en-US | YK | GMID change - new material code |
| CEP | **CORE** | en-US | YL | Incomplete item |
| CEP | **CORE** | en-US | YM | Business decision |
| CEP | **CORE** | en-US | YN | LIM quota - Stock shortage |
| CEP | **CORE** | en-US | YO | LIM quota - Stock shortage |
| CEP | **CORE** | en-US | YP | LIM quota - Stock shortage |
| CEP | **CORE** | en-US | YQ | Wastage |
| CEP | **CORE** | en-US | YR | Insufficient transport |
| CEP | **CORE** | en-US | YS | Transfer delay |
| CEP | **CORE** | en-US | YT | Payment item missing |
| CEP | **CORE** | en-US | YU | A less quantity Return versus Order |
| CEP | **CORE** | en-US | YW | BUHP blocking |
| CEP | **CORE** | en-US | YX | Cancelled by depositary |
| CEP | **CORE** | en-US | Z1 | On hold |
| CEP | **CORE** | en-US | Z2 | Closed |
| CEP | **CORE** | en-US | Z3 | Replaced |
| CEP | **CORE** | en-US | Z4 | Closed temporarily |
| CEP | **CORE** | en-US | Z5 | Delivery not possible |
| CEP | **CORE** | en-US | YQ | Wastage |
| CEP | **CORE** | en-US | YR | Insufficient transport |
| CEP | **CORE** | en-US | YS | Transfer delay |
| CEP | **CORE** | en-US | YT | Payment item missing |
| CEP | **CORE** | en-US | YU | A less quantity Return versus Order |
| CEP | **CORE** | en-US | YW | BUHP blocking |
| CEP | **CORE** | en-US | YX | Cancelled by depositary |
| CEP | **CORE** | en-US | Z1 | On hold |
| CEP | **CORE** | en-US | Z2 | Closed |
| CEP | **CORE** | en-US | Z3 | Replaced |
| CEP | **CORE** | en-US | Z4 | Closed temporarily |
| CEP | **CORE** | en-US | Z5 | Delivery not possible |
| CEP | **CORE** | en-US | ? | discrepancy return |
| SHIFT | **CORE** | en-US | V1 | Vol adjust(Prod. Alloc -qty exceeded) |
| SHIFT | **CORE** | en-US | V2 | Vol adjust(Stock in trade adjustment) |
| SHIFT | **CORE** | en-US | **ZQ** | Vol adjust(Qty min/max) |
| SHIFT | **CORE** | en-US | C1 | Commercial(Pruned. Product) |
| SHIFT | **CORE** | en-US | C2 | Comm. Cust. Price diff from SAP Price |
| SHIFT | **CORE** | en-US | CU | Customer reason |
| SHIFT | **CORE** | en-US | CR -> CR already exists hence changing to CM | Credit management issue |
| SHIFT | **CORE** | en-US | **ZA** | Out of stock - Backorder not accepted |
| SHIFT | **CORE** | en-US | **ZB** | Out of stock -Backorder closed |
| SHIFT | **CORE** | en-US | ZC | Out of stock - BO retaken in new PO |
| SHIFT | **CORE** | en-US | ZD | Out of stock - Shortdated product |
| SHIFT | **CORE** | en-US | cancelled | System/data issue |
| SHIFT | **CORE** | en-US | S2 | Duplicate order |
| SHIFT | **CORE** | en-US | A1 | Expired drug license |
| SHIFT | **CORE** | en-US | A2 | Contract issue |
| SHIFT | **CORE** | en-US | D1 | Rejection in Delivery |
| SHIFT | **CORE** | en-US | MR | Multiple rejection reasons |
| SHIFT | **CORE** | en-US | E1 | Embargo check |
| SHIFT | **CORE** | en-US | E2 | Import/export license |
| SHIFT | **CORE** | en-US | E3 | SPL hit |
| SHIFT | **CORE** | en-US | R1 | Credit Denied |
| SHIFT | **CORE** | en-US | R2 | Return outside allowed period |
| SHIFT | **CORE** | en-US | R3 | Unauthorized return |
| SHIFT | **CORE** | en-US | R4 | Overstock non creditable |
| SHIFT | **CORE** | en-US | R5 | Not in original package |
| SHIFT | **CORE** | en-US | R6 | Expired at 0% |
| SHIFT | **CORE** | en-US | S1 | Price issue |
| SHIFT | **CORE** | en-US | S3 | Customer Master Data issue |
| SHIFT | **CORE** | en-US | S4 | Material Master Data issue |
| SHIFT | **CORE** | en-US | C3 | Cancelled by Sales Rep |
| SHIFT | **CORE** | en-US | ZE | Seasonal Product |
| SHIFT | **CORE** | en-US | C4 | Value under minimum threshold |

### [Table in CCM] Unit codes

Pega CCM will have to keep the list of Units (**Relevant for sales** – Not all) to be used by operators to indicate the unit for quantities claimed when needed. This table will be initiated manually and will not require any interface.This table is defined in Core.

The table below will have the following columns:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Label | Type | Length | Description |
|  | UniqueID |  |  | Id generated by Pega CCM |
|  | Source System | Text | 10 | Source system |
|  | Country code | Text | 3 | Country code ISO code 2 characters. |
|  | Language Code | Text | 2 | The Language ISO Code 2 characters. |
|  | Unit Code | Text | 4 | Unit code |
|  | Unit Label | Text | 40 | Unit Label (Description) |

## Security and Control (S)

### Data encryption within cloud

Pega Cloud uses data-at-rest encryption (DARE) in all Pega Cloud customer instances to help secure application data, as well as to help comply with industry-standard security requirements. "Data at rest" refers to any content that is saved on a hard drive. Pega Cloud provides 256-bit AES encryption of data-at-rest.

Please check this link for additional details:

[https://pdn.pega.com/data-rest-encryption-pega-cloud/data-rest-encryption-pega-cloud-0](https://urldefense.proofpoint.com/v2/url?u=https-3A__pdn.pega.com_data-2Drest-2Dencryption-2Dpega-2Dcloud_data-2Drest-2Dencryption-2Dpega-2Dcloud-2D0&d=DwMF-g&c=Dbf9zoswcQ-CRvvI7VX5j3HvibIuT3ZiarcKl5qtMPo&r=rMVZW1jkTHTKgxL7SuO8PgyLoRhv6w2uyb-qN6cKNAY&m=68dlMCRmpQlqE_BWv60BTYqDToPlk1yyfXfnj6T2qKQ&s=Cll0iqXygGbMTdxMRausALkGsDHaMpSwOaKaEcbvOq4&e=)

### Pega cloud security standard

<https://pdn.pega.com/pega-cloud-security-standards/pega-cloud-security-standards>

### Interfaces Retry

Pega CCM is using SOAP connectors defined in the next chapters. In case the target system are not providing a response (because of a timeout or because of any exceptions happening at Tibco, Layer7, SAP or any other layer). Then Pega CCM will not trigger an automatic retry and will rather display the exception error message provided as part of the response, It’s up to the agent to manually retry.

The error message structure is defined on each connector response; Pega CCM will display the same error message provided by backend. Tibco will guarantee that Pega CCM will always get an error structure messages before timeout. ([Check connection timeout](#_Connection_Time-out))

### Time out

The following types of time outs are defined in the system:

#### Authentication time-out

Authentication time-out is the length of time between when user activity in a browser session ceases and Pega Platform requires reauthentication. The expired browser session is still displayed during this time. This length of time is set to 45 minutes.

When users are inactive for a certain period of time, PRPC and the Pega 7 Platform require users to reauthenticate by entering their login credentials. The browser session cannot resume until the login and password are accepted. Requiring reauthentication helps prevent a malicious or unauthorized user from hijacking the browser session. However, if reauthentication fails or is canceled, some or all of the data on the screen might continue to be displayed.

The Authentication timeout is set at the access group level, it will be set to a number of seconds equal to = 45\*60= 2700 s.

Please note: This configuration should be aligned with the SSO platform.

#### Lock timeout

The length of time a user can hold a lock on a case without any activity. Locks held for longer than this interval are marked as "soft" and may be forcibly released, even when the requestor session is active and processing. This time out is set to 30 minutes.

#### Connection Time-out

Pega CCM will trigger web services to backend, Pega CCM will set a timeout of 30 seconds, within which backend will have to respond, the response could be a success or a fail. Transformation layer (Tibco) is taking the responsibility to guarantee that each request made by Pega CCM is processed and will provide back to Pega CCM the result of this request within the agreed time.

#### Timeout passivation and Auto-Save

Passivation allows a requestor to be saved into the Pega database and reactivated later, helping to free up JVM memory, and making more memory available to other requestors.

When a requestor is activated, the pages that had previously been passivated remain on the system and are not affected. If the same page is later re-passivated, it is updated accordingly.

Timeout passivation in a single-node system allows users to resume work without loss of context after a specific period of no activity, with the possibility that they will have to reauthenticate.

By default, the passivation daemon, which operates once per minute, passivates the following:

* Pages that are idle for at least 15 minutes
* Threads that are idle for at least 30 minutes
* Requestors that are idle for at least 60 minutes

Timeout passivation will be activated for Pega CCM and auto-save is done via the passivation.

### Security requirements

|  |  |  |
| --- | --- | --- |
| *Id* | *Description* | *Description of the specification* |
| *NF-SEC-08* | *All flows between Sanofi (or external partners) and the application in cloud must be encrypted.* | * Pega CCM is using https protocol to communicate between Pega cloud and end user terminals. * Calls between Pega CCM and backend are done via the secured gateway “Layer7”. |
| *NF-SEC-09* | *The system must record following events for traceability:*  *• Successful user authentication*  *• Failed user authentication*  *• User profile/rights modification* | * Authentication for Pega CCM is delegated to SSO service “Ping ID”. Pega will not manage the successful /failed authentication of users. SSO service will redirect the request to Pega once user is successfully authenticated. * Pega maintains in Audit trail at the operator level, this audit will list the updates made to this record. The actions recorded by the audit are : Who created the records, Who updated the records and date time of actions. The Audit trail is available at the “Operator” record level in Pega. The Audit trail is accessible to the system admin in the Case designed portal. |
| *NF-SEC-10* | *The system must provide the ability to deactivate and reactivate user and administrator accounts without losing their history of activities within the system.* | Pega provides a checkbox at the operator record level called “Disable Operator”.  When user is disabled, he will not get access to Pega CCM. Pega CCM will not remove any actions related to the disabled operator. |
| *NF-SEC-11* | *The system should provide the ability to create a list of users with associated access rights* | The list access rights in Pega are defined with the rule “Access Group”.  CCM has identified a list of “Access Groups” to be created based on the access rights defined for each profile.  The Operator record in Pega will list the access groups to which operator are associated.  Pega provides a reporting that displays the Access groups created and number of users associated to each. This report is available to system admin in the Case designed portal. |
| *NF-SEC-12* | *A user must only be able to connect to one session at the same moment. The last session must deactivate all previous (In case of navigator Crash)* | Pega by default will not allow the creation of two parallel sessions for the same user on the same browser. If user is using two different browsers or connecting with incognito mode then Pega is not able to prevent opening of two sessions.  Pega allows opening of several cases within the same session, in fact Pega is using Pega PRThread which are data structures that allows a requestor to have separate clipboard page name spaces that do not interact with each other. |
| *NF-SEC-13* | *Be able to submit a message to users when their user account is created to inform them about the use of some of their personal data in the system* | When operator is newly created, Pega CCM will send an email to user.  [JIRA: [SCCORE-1035 - SPEC: Welcome Email when new Operator is having access to Pega CCM](https://shiftproject.atlassian.net/browse/SCCORE-1035) – Assigned to Quality] |
| *NF-ER-04* | *The system must contain error detection for invalid field entries, out of range values, blank fields for required entry, invalid data types related to the defined GxP Electronic Records.* | GxP Electronic Record for CCM is represented by a case.  Error detection will be provided as part of detailed function specification for each screen. |
| *NF-ER-07* | *The system must create a secure computer generated, time stamped audit trail of creation, modification, or deletion of GxP Electronic Records that independently records:*  *• User or administrator name*  *• Date and time (hours, minutes, seconds) of operator entries and actions (time zone if applicable)*  *• Old data or value in case of modification or deletion*  *• Reason for the modification (if required by the regulations)* | Pega default audit trail will list the:   * Case creation timestamp and user who performed the creation. * Last update timestamp of a case and who performed this update. * Status update of the case. * Attachment added to the case.   To keep track of the old values vs the new values, The way how Pega will track those values is mentioned in the GxP Specification. |
| *NF-ER-08* | *The system’s audit trail must record creation, modification, and deactivation of user/administrator access accounts and electronic signature accounts.* | Answered above. |
| *NF-OP-08* | *All screens are printable* | The print feature in Pega is using the browser print. |
| *NF-OP-11* | *Create, modify and delete templates of Word documents (by specific profiles)* | No word templates were identified as part of functional requirements. |
| *NF-OP-14* | *All lists displayed on screens are exportable on Excel* | The reports using “Report definition” rules can be exported to excel or PDF. The reports are used to track business KPI. |

### Organization

Following the Pega standard, each application should structure the operator organization using the following levels:

* Organization
* Division
* Unit

Based on inputs from inception and the organization of work, we have identified this target organization for CCM core and France.

#### Organization Core

A division in CCM is representing a country.

Inside the division we identify several units. Each unit will represent a team.

For the list of teams in core and how teams are managed in Pega CCM , please refer to the admin portal specification.

#### Operators administration

Please refer to functional specification for “Administration portal”. [(Available at Functional specification folder)](https://spirit.sanofi.com/cs/sccore/ccm/Sccore%20CCM/Forms/AllItems.aspx?RootFolder=%2Fcs%2Fsccore%2Fccm%2FSccore%20CCM%2F06_Functional%20Scope%2FSpecifications%2FIterations&FolderCTID=0x012000E02BF83F29921245B6D7FF942D293531&View=%7B389B6F32-F4C2-4FE6-80D2-76D94CA148F6%7D)

### Authentication

This paragraph describes the authentication model in Pega CCM. Authentication identifies how operators are granted access to Pega CCM.

Every Operator accessing Pega CCM will be initially redirected to SSO system to get him/her self-authenticated. Sanofi provides Ping Identify as an identification provider. The details below summarizes the Identification provider details

### Authorization: Access Groups

#### Core

The following profiles were identified and will be created at core level:

* **CCMCore:AgentLevel1:** Have only access to the agent portal, Will be able to take a call , classify the claim , and start the resolution (Could be restricted based on country requirement). Additionally can access KPI ( Reporting)
* **CCMCore:AgentLevel2:** Have only access to agent portal , will be able to take call, classify the claim and start the resolution (Most countries will define only level 2 agents) and manage all tasks related to created cases. Additionally can access KPI ( Reporting)
* **CCMCore:Supervisor:** Have only access to agent portal. Have all the permissions given to an agent , additionally can access KPI ( Reporting)
* **CCMCore:ContributorUser:**  Have only access to the contributor portal, will be able to access his personal work , or a work basket , Can approve or review tasks, Approvers have access to contributor portal.
* **CCMCore:AppAdmin:** Have access to the administrator portal.

An operator can have 1 or many profiles. The profiles in Pega CCM are permissive. The system will check if one of the linked profiles will allow the user to execute an action.

The profiles are defined in Pega CCM and are not imported from any other systems. The system admin should be careful to check that a user has the appropriate authorizations in backend. Pega CCM is not replicating the authorizations in backend as those are moving consistently.

#### France

The following profiles were identified and will be created at France level; those profiles will inherit from core profiles.

* **CCMFR:AgentLevel1**
* **CCMFR:AgentLevel2**
* **CCMFR:Supervisor**
* **CCMFR: ContributorUser**
* **CCMFR:AppAdmin:** Have access to the administrator portal. Will have access to configuration for France (means classification matrix, Policy, Operators, centers…related to France)

## Back Up and Contingency (BC)

Data recovery is available for Pega cloud production environment. The Pega Cloud Database Replication service protects production environments by deploying a real-time database mirror in a different availability zone. Failover to the production mirror is automatic, with a recovery point objective (RPO) of approximately 1 minute. Please check the link below.

[https://pdn.pega.com/pega-cloud-data-backup-and-recovery/pega-cloud-data-backup-and-recovery](https://urldefense.proofpoint.com/v2/url?u=https-3A__pdn.pega.com_pega-2Dcloud-2Ddata-2Dbackup-2Dand-2Drecovery_pega-2Dcloud-2Ddata-2Dbackup-2Dand-2Drecovery&d=DwMF-g&c=Dbf9zoswcQ-CRvvI7VX5j3HvibIuT3ZiarcKl5qtMPo&r=rMVZW1jkTHTKgxL7SuO8PgyLoRhv6w2uyb-qN6cKNAY&m=68dlMCRmpQlqE_BWv60BTYqDToPlk1yyfXfnj6T2qKQ&s=_MxCshjyYzQp3pIBSQxPKaMiPV0R5SiYRjxcLvxQMDc&e=)

## User Interface Specification (UI)

Not covered in this document, will be covered in specification for each process.

## Report Specification (RS)

Pega CCM KPIs will be defined in a separate functional specification. KPIs in Pega CCM will define KPI related to activities managed in Pega CCM tools (means KPI related to cases, tasks).

## External Interfaces Specification (EI)

### Emails & Fax

#### Outbound/Inbound Email

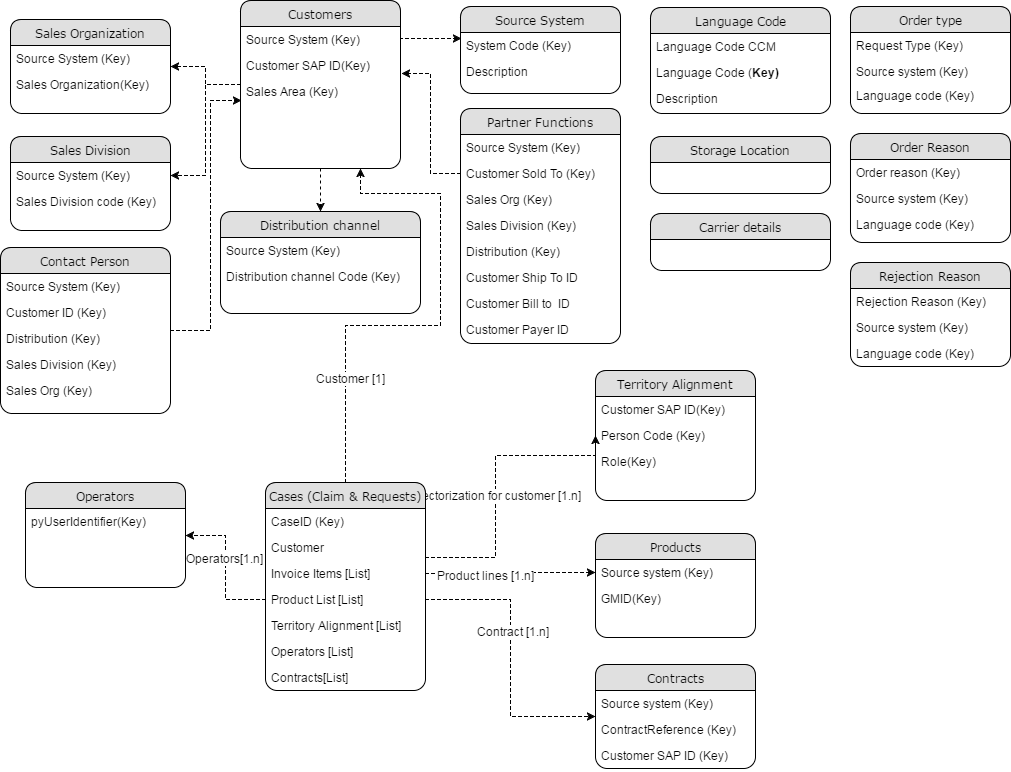
*Tthe complete list of emails accounts, including details about production are included in the* "**SCCore-CCM - AS - Architecture Specification.docx**" document.

### Master Data [Backend to CCM]

#### General assumption for all Master data management:

* Initial load of Customers, Products, Territory alignment in Pega CCM are done via a CSV loaded manually in Pega CCM.
* During the initial load of master data, the services from Pega CCM will be deactivated and those from Tibco as well. After the verification of the initial load then services from Pega CCM will be activated and ready to receive the delta changes (Connectors from Tibco should be activated as well).
* Services provided by Pega CCM will receive the delta changes.
* Pega CCM is not making validation of lines provided in the CSV. We assume data provided in the CSV files are relevant. Pega CCM will generate logs to describe the processing of files.

#### Conceptual data model



#### [Service] Customers from backend

Service 2: Load customers

Pega CCM will expose a service to get the updated customer objects in backend. The service exposed will be of type SOAP, the data model will be sent as an XML.

Pega CCM will get the updates from backend using services; Pega CCM will receive only the delta.

Source system property will help identifying from which SAP the data model was retrieved.

##### Core Model:

|  |  |  |  |
| --- | --- | --- | --- |
| ***Column in Pega CCM*** | ***Type*** | ***Length*** | ***Description*** |
| **Source System (Key)** | Text  (Required) | 10 | Source system (CEP, IS2000, SHIFT…) |
| **Customer ID (Key)** | Number  (Required) | 10 | The SAP customer ID (CEP,SHIFT) |
| **Customer VAT Number** | Text  (Required) | 20 | VAT number as the European identification of the customer. (CEP,SHIFT) |
| **National Customer ID 1** | Alpha Numeric  (Optional) | 16 | FR: SIREN |
| **Local Customer ID 1** | Alpha Numeric  (Optional) | 10 | Will include the local customer SAP code (Example CIP sales point for pharma France, Local customer id for Brazil….) (CEP,SHIFT) |
| **Customer Name** | Text  (Required) | 40 | Customer Name1 (Legal Name - Organization) (CEP,SHIFT) |
| **Contact Name** | Text  (Optional) | 40 | Customer main contact Name  (CEP,SHIFT) |
| **Customer Name 2** | Text(Optional) | 40 | Customer Name2 (Legal Name) (CEP,SHIFT) |
| **Customer Name 3** | Text(Optional) | 40 | Trading Name (CEP,SHIFT) |
| **Customer Name 4** | Text(Optional) | 40 | Trading Name (CEP,SHIFT) |
| **Email Primary** | Text | 241 | Email of the main contact of the organization (CEP,SHIFT) |
| **Phone1** | Text | 30 | General Phone 1 (Fix) (CEP,SHIFT) |
| **Phone2** | Text | 30 | Phone 2 (Mobile) (CEP,SHIFT) |
| **Fax1** | Text | 30 | Fax1 (CEP,SHIFT) |
| **Fax2** | Text | 30 | Fax2 (CEP,SHIFT) |
| **Address Line 1** | Text | 60 | Address1 (Street name) (CEP,SHIFT) |
| **Address Line 2** | Text | 40 | Address2 (CEP,SHIFT) |
| **Address Line 3** | Text | 40 | Address3 (CEP,SHIFT) |
| **Address Line 4** | Text | 40 | Address4 (CEP,SHIFT) |
| **Postal Code** | Number | 10 | Postal Code (CEP,SHIFT) |
| **City** | Text | 40 | City Name (CEP,SHIFT) |
| **Country Code** | Text | 3 | Country Code ISO Code (CEP,SHIFT) |
| **Country Label** | Text | 50 | Country Name (CEP,SHIFT) |
| **Region Code** | Text | 3 | Will display the region (Specific to country) (CEP,SHIFT) |
| **Region Label** | Text | 50 | Will display the region name (CEP,SHIFT) |
| **Payment Terms Code** | Text | 4 | Payment Terms (CEP,SHIFT) |
| **Payment Terms Label** | Text | 30 | Payment Terms: A description of payment term, It could display X days from Invoice, delivery… (CEP,SHIFT) |
| **Payment Method Code** | Text | 10 | Like Check, Cash. (CEP,SHIFT-for automatic payment transactions)  For multiple methods, they should be listed in the same field and separated by a “/” (ex 5/8/9) |
| **Payment Method Label** | Text | 200 | Label  (CEP,SHIFT-country specific name)  For multiple methods, they should be listed in the same field and separated by a “/” (ex: Cash/Cheque/Direct Debit) |
| **Currency** | TEXT | 5 | Currency ISO Code  (CEP,SHIFT)  Field is on 5, although only 3 characters are used |
| **Inco Terms** | Text | 3 | Inco Terms at the sales Organization level. (CEP,SHIFT) |
| **Inco Terms2** | Text | 28 | Inco Terms 2 at the sales Organization level. (CEP,SHIFT) |
| **Order Blocked Code** | Text | 2 | Displays block code at order level if any. (CEP,SHIFT) |
| **Order Blocked Label** | Text | 20 | Label (CEP,SHIFT) |
| **Order Blocked Date** | Text | 8 | YYYYMMDD : Date of block (CEP,SHIFT) |
| **Delivery Blocked Code** | Text | 2 | Displays block code at delivery level if any. (CEP,SHIFT) |
| **Delivery Blocked Label** | Text | 20 | Label (CEP,SHIFT) |
| **Delivery Blocked Date** | Text | 8 | YYYYMMDD : Date of block (CEP,SHIFT) |
| **Credit Blocked Code** | Text | 2 | Displays block code at credit level if any. (CEP,SHIFT) |
| **Credit Blocked Label** | Text | 20 | Label (CEP,SHIFT) |
| **Credit Blocked Date** | Text | 8 | YYYYMMDD : Date of block (CEP,SHIFT) |
| **Central Block** | Boolean | 2 | The central block flag (CEP,SHIFT) |
| **Central Block Date** | Text | 8 | YYYYMMDD : Date of block (CEP,SHIFT) |
| **Group Code** | Text | 2 | Displays the Group code (CEP,SHIFT) |
| **Group Label** | Text | 20 | Displays the Group to which customer belongs.  The Group label could be Wholesaler, Hospitals , Pharmacies (CEP,SHIFT) |
| **Cluster SAP ID** | Text | 10 | Some customers could belong to a cluster which is a Customer SAP ID code. (CEP,SHIFT)  (Previously called Parent customer) |
| **Cluster Label** | Text | 50 | Name of the cluster SAP Customer (CEP,SHIFT- Business Partner) |
| **Customer Account Type Code** | Text | 7 | Sold to or ship to or other type.  (CEP,SHIFT- Business Partner Role)  Pega CCM will expect the following normalized value, as it will rely on those code to drive some business processes; Codes are **normalized** :   * SHIPTO * SOLDTO * BILLTO |
| **Customer Account Type Label** | Text | 30 | Represents the label associated to the codes above:   * SHIPTO : Delivery customer * SOLDTO : Ordering customer * BILLTO : Bill To customer     (CEP,SHIFT- Business Partner Role Title) |
| **Customer Segmentation** | Text | 1 | Will include a label that describes the importance of the customer. The values expected by Pega CCM are **normalized** :  For SHIFT:  - PARTNER  - DEVELOPING  - OPERATIONAL  - TRANSACTIONAL  For France CEP:  - VIP\_HIGH  - NOVIP |
| **Customer Segmentation Local** | Text | 30 | This field was added to display the customer segmentation as originally displayed in the SAP system (Without any additional transformation).  For France those are the possible values:   * VIP+++ * Autres VIP * Autres clients régulier * Client Occasionel * Grand compte * Grand Compte clé. * Autre |
| **Flag for deletion** | Boolean | 1 | Expected :  1 = True  0 = False  Will indicate if customer is flagged for deletion. (CEP,SHIFT) |
| **Language** | Text | 2 | Preferred language of the customer, This also will indicate according to what language the labels were provided by backend. (CEP, SHIFT).  The Language code will have one of the values identified in the table “[Language Codes](#_[Table_in_CCM]_1)” under column “Language Code backend” |
| **IsSurvey Enabled** | Boolean | 1 | Expected :  1 = True  0 = False  Defined by agent in CCM and maintained in CCM. Is not related to any data in backend. It will drive sending survey to customer. |
| **Customer Sector** | Text | 3 | The expected normalized value are :  -PRIVATE  -PUBLIC |
| **Proforma** | Boolean | 1 | Expected :  1 = True  0 = False |
| **isEDI** | Boolean | 1 | Expected :  1 = True  0 = False  True or False, indicate if EDI is enabled for the customer. This information is retrieved from backend (SAP) |
| **Customer Sold To** | Text | 10 | The customer sold to related to this customer. It’s the customer SAP ID.  For customer having the account to type = “BILLTO” then this field will show the customer Sold To id.  For customer having the account type = “SOLDTO”, the same customer SAP Code will display. |
| **Has Bank Account** | Boolean | 1 | Will get to true if the customer has some bank account details specified. |

###### Sales Areas for customers

|  |  |  |  |
| --- | --- | --- | --- |
| ***Column in Pega CCM*** | ***Type*** | ***Length*** | ***Description*** |
| **Source System (Key)** | Text | 10 | Source system (CEP, IS2000, SHIFT…) |
| **Customer ID (Key)** | Text | 10 | It is the customer SAP Code (CEP,SHIFT) |
| **Sales Organization (Key)** | Text  (Required) | 4 | (CEP,SHIFT) |
| **Sales Organization Label** | Text | 20 | (CEP,SHIFT) |
| **Sales Division (Key)** | Text  (Required) | 2 | (CEP,SHIFT) |
| **Sales Division Label** |  | 20 | (CEP,SHIFT) |
| **Distribution channel (Key)** | Text  (Required) | 2 | (CEP,SHIFT) |
| **Distribution channel Label** | Text | 20 | (CEP,SHIFT) |
| **Company Code** | Text  (Required) | 4 | (CEP,SHIFT) |
| **Company Label** | Text  (Required) | 25 | (CEP,SHIFT) |
| **Credit Limit** | Number | 15 | Assigned Credit limit (On Sales Org) (CEP, SHIFT) |
| **Credit Limit Currency** | Text | 5 | Currency of the Credit Limit amount |

###### Customer Partner functions

A customer should have customer partner entries; the link between a customer and its partners is defined in the table below.

|  |  |  |  |
| --- | --- | --- | --- |
| ***Column in Pega CCM*** | ***Type*** | ***Length*** | ***Description*** |
| **Source System(Key)** | Text | 10 | Source system (CEP, IS2000, SHIFT…) |
| **Customer ID (Key)** | Text | 10 | It is the customer SAP Code (CEP,SHIFT) |
| **Sales Organization (Key)** | Text  (Required) | 4 | (CEP,SHIFT) |
| **Distribution channel (Key)** | Text  (Required) | 2 | (CEP,SHIFT) |
| **Sales Division (Key)** | Text  (Required) | 2 | (CEP,SHIFT) |
| **Partner ID (Key)** | Text | 10 | Customer SAP ID code of the partner (CEP,SHIFT) |
| **Role (Key)** | Text | 10 | Partner Role , normalized values are used:   * SHIPTO * BILLTO * PAYER |

###### Contact Person

Each customer could have a list of contact persons, those contacts are used in Pega CCM to be displayed in the customer 360 and to allow the agent to identify who from customer side has requested for the claim or request. The contact person will be retrieved from backend as master data (retrieved by the same service).

Contacts can also be added in Pega CCM by the agent during case creation.

|  |  |  |  |
| --- | --- | --- | --- |
| ***Column in Pega CCM*** | ***Type*** | ***Length*** | ***Description*** |
| **Unique ID (Key)** | Text |  | Technical sequence ID |
| **Source System** | Text | 10 | Source system (CEP, IS2000, SHIFT…) |
| **Customer ID** | Text | 10 | It is the customer SAP Code |
| **Sales Organization code** | Text | 4 | Sales Org Code (CEP,SHIFT) |
| **Sales Division Code** | Text | 2 | (CEP,SHIFT) |
| **Distribution channel Code** | Text | 2 | Distribution channel code. (CEP,SHIFT) |
| **Contact name** | Text | 40 | (CEP,SHIFT) |
| **Telephone** | Text | 30 | (CEP,SHIFT) |
| **Department** | Text | 4 | (CEP,SHIFT) |
| **Description** | Text | 20 | (CEP,SHIFT) |
| **Function** | Text | 2 | (CEP,SHIFT) |
| **Email** | Text | 241 | (CEP,SHIFT) |
| **Fax** | Text | 30 | (CEP,SHIFT) |

###### Customer XSD/XML

Here below the xsd representation of the customer master expected from backend, the following format will group for each customer the relevant details of its partners, sales areas and contacts.

**XSD:**

|  |
| --- |
| <xs:schema attributeFormDefault="unqualified" elementFormDefault="qualified" xmlns:xs="http://www.w3.org/2001/XMLSchema">  <xs:element name="Response">  <xs:complexType>  <xs:sequence>  <xs:element name="Customers">  <xs:complexType>  <xs:sequence>  <xs:element name="Customer">  <xs:complexType>  <xs:sequence>  <xs:element type="xs:string" name="SourceSystem"/>  <xs:element type="xs:string" name="CustomerID"/>  <xs:element type="xs:string" name="CustomerVATNumber"/>  <xs:element type="xs:string" name="NationalCustomerID1"/>  <xs:element type="xs:string" name="LocalCustomerID1"/>  <xs:element type="xs:string" name="CustomerName"/>  <xs:element type="xs:string" name="ContactName"/>  <xs:element type="xs:string" name="CustomerName2"/>  <xs:element type="xs:string" name="CustomerName3"/>  <xs:element type="xs:string" name="CustomerName4"/>  <xs:element type="xs:string" name="EmailPrimary"/>  <xs:element type="xs:string" name="Phone1"/>  <xs:element type="xs:string" name="Phone2"/>  <xs:element type="xs:string" name="Fax1"/>  <xs:element type="xs:string" name="Fax2"/>  <xs:element type="xs:string" name="AddressLine1"/>  <xs:element type="xs:string" name="AddressLine2"/>  <xs:element type="xs:string" name="AddressLine3"/>  <xs:element type="xs:string" name="AddressLine4"/>  <xs:element type="xs:string" name="PostalCode"/>  <xs:element type="xs:string" name="City"/>  <xs:element type="xs:string" name="CountryCode"/>  <xs:element type="xs:string" name="CountryLabel"/>  <xs:element type="xs:string" name="RegionCode"/>  <xs:element type="xs:string" name="RegionLabel"/>  <xs:element type="xs:string" name="PaymentTermsCode"/>  <xs:element type="xs:string" name="PaymentTermsLabel"/>  <xs:element type="xs:string" name="PaymentMethodCode"/>  <xs:element type="xs:string" name="PaymentMethodLabel"/>  <xs:element type="xs:string" name="Currency"/>  <xs:element type="xs:string" name="IncoTerms"/>  <xs:element type="xs:string" name="IncoTerms2"/>  <xs:element type="xs:string" name="OrderBlockedCode"/>  <xs:element type="xs:string" name="OrderBlockedLabel"/>  <xs:element type="xs:string" name="OrderBlockedDate"/>  <xs:element type="xs:string" name="DeliveryBlockedCode"/>  <xs:element type="xs:string" name="DeliveryBlockedLabel"/>  <xs:element type="xs:string" name="DeliveryBlockedDate"/>  <xs:element type="xs:string" name="CreditBlockedCode"/>  <xs:element type="xs:string" name="CreditBlockedLabel"/>  <xs:element type="xs:string" name="CreditBlockedDate"/>  <xs:element type="xs:string" name="CentralBlock"/>  <xs:element type="xs:string" name="CentralBlockDate"/>  <xs:element type="xs:string" name="CreditControlArea"/>  <xs:element type="xs:decimal" name="CreditLimit"/>  <xs:element type="xs:string" name="GroupCode"/>  <xs:element type="xs:string" name="GroupLabel"/>  <xs:element type="xs:string" name="ParentCustomer"/>  <xs:element type="xs:string" name="ParentCustomerLabel"/>  <xs:element type="xs:string" name="CustomerAccountTypeCode"/>  <xs:element type="xs:string" name="CustomerAccountTypeLabel"/>  <xs:element type="xs:string" name="CustomerSegmentation"/>  <xs:element type="xs:byte" name="FlagForDeletion"/>  <xs:element type="xs:string" name="Language"/>  <xs:element type="xs:string" name="LocalCustomerID3"/>  <xs:element type="xs:string" name="CustomerSector"/>  <xs:element type="xs:byte" name="Proforma"/>  <xs:element type="xs:string" name="IsEDI"/>  <xs:element type="xs:string" name="CustomerSoldTo"/>  <xs:element type="xs:string" name="HasBankAccount"/>  <xs:element type="xs:string" name="IsUnderContract"/>  <xs:element name="SalesAreas">  <xs:complexType>  <xs:sequence>  <xs:element name="SalesArea">  <xs:complexType>  <xs:sequence>  <xs:element type="xs:string" name="SalesOrganization"/>  <xs:element type="xs:string" name="SalesOrganizationLabel"/>  <xs:element type="xs:string" name="SalesDivision"/>  <xs:element type="xs:string" name="SalesDivisionLabel"/>  <xs:element type="xs:string" name="DistributionChannel"/>  <xs:element type="xs:string" name="DistributionChannelLabel"/>  <xs:element type="xs:string" name="CompanyCode"/>  <xs:element type="xs:string" name="CompanyCodeLabel"/>  </xs:sequence>  </xs:complexType>  </xs:element>  </xs:sequence>  </xs:complexType>  </xs:element>  <xs:element name="Partners">  <xs:complexType>  <xs:sequence>  <xs:element name="Partner" maxOccurs="unbounded" minOccurs="0">  <xs:complexType>  <xs:sequence>  <xs:element type="xs:string" name="CustomerID"/>  <xs:element type="xs:string" name="SourceSystem"/>  <xs:element type="xs:string" name="Role"/>  </xs:sequence>  </xs:complexType>  </xs:element>  </xs:sequence>  </xs:complexType>  </xs:element>  <xs:element name="Contacts">  <xs:complexType>  <xs:sequence>  <xs:element name="Contact" maxOccurs="unbounded" minOccurs="0">  <xs:complexType>  <xs:sequence>  <xs:element type="xs:string" name="Name"/>  <xs:element type="xs:string" name="Phone"/>  <xs:element type="xs:string" name="Department"/>  <xs:element type="xs:string" name="Description"/>  <xs:element type="xs:string" name="Function"/>  <xs:element type="xs:string" name="Email"/>  <xs:element type="xs:string" name="Fax"/>  </xs:sequence>  </xs:complexType>  </xs:element>  </xs:sequence>  </xs:complexType>  </xs:element>  </xs:sequence>  </xs:complexType>  </xs:element>  </xs:sequence>  </xs:complexType>  </xs:element>  </xs:sequence>  </xs:complexType>  </xs:element>  </xs:schema> |
|  |

#### [Service] Territory alignment

Territory alignment is related to each customer; it defines for each customer a list of sales representatives and Agent level 2 dedicated to this customer.

Territory alignment data model is Core Model. The interactions with MI/RIO are specific to France.

##### Core Model

For each customer, CCM identifies this list of contact roles:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***#*** | ***Role Code*** | ***Description*** | ***Retrieved from system*** | ***Involved in Process***  ***( Means could receive a task in CCM)*** |
|  | AGENTL2 | Agent Level 2 | Maintained in CCM: Means an admin should update the table in Pega CCM ( Admin will be able to export the data in CSV and upload it) | Yes |
|  | REPS\_DP | Reps at drug store and pharmacies (Commercial) | From External system | No |
|  | REPS\_DZ | Area Director (Commercial) | From External system | No |
|  | REPS\_DR | Regional (subset of area) Director (Commercial) | From External system | No |
|  | REPS\_SGE | Headquarter | From External system | No |
|  | REPS\_VL | Reps for drug store and pharmacies covering a wide territory (he could be used for replacing someone during a training period…) (Commercial) | From External system | No |

###### Localization: France

Additionaly to the roles identified for CORE, France will have those roles:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***#*** | ***Role Code*** | ***Description*** | ***Retrieved from system*** | ***Involved in Process***  ***( Means could receive a task in CCM)*** |
|  | REPS\_DOSR | Director of Area (Commercial) | Yes | No |
|  | REPS\_DRO | Regional Director for drug store and pharmacies. | Yes | No |
|  | REPS\_DVM | Area Director (Commercial) | Yes | No |
|  | REPS\_RSR | for Oncology, equivalent to a Regional Director (Commercial) | Yes | No |

###### [Table in CCM] Territory alignment per customer: TA\_PER\_CUSTOMER

This table will include all the contacts per customer.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***#*** | ***Field*** | ***Type*** | ***Length*** | ***Description*** |
|  | Customer Local ID 1 **(Key)** | Text | 64 | Customer Local ID 1 as defined in the customer Master Data. |
|  | Customer Source system **(Key)** | Text | 64 | Identify to which source system customer is related |
|  | Country code**(Key)** | Text | 2 | ISO Code of the country |
|  | Customer Sales Organization **(Key)** | Text | 64 | Identify to which sales organization code the customer is related. |
|  | Person code **(Key)** | Text | 64 | Sanofi ID. |
|  | Person Name | Text | 200 | Concatenation of person first name and last name |
|  | Role **(Key)** | Text | 64 | Will have one of the role code defined above. |
|  | Description | Text | 200 | Role description |
|  | Affiliation | Text | 64 | Affiliation of the commercial representative to a specific area. |
|  | Phone1 | Text | 64 | Business Phone |
|  | Fax | Text | 64 | Business Fax |
|  | Address1 | Text | 200 | Business Address1 |
|  | Address2 | Text | 200 | Business Address2 |
|  | Postal code | Text | 64 | Postal code |
|  | City | Text | 64 | City name |
|  | Email 1 | Text | 64 | Business Email 1 |

It was decided to remove the columns below from the Territory alignment table structure:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Network Code | Text | 64 | France Only |
|  | Network Desc | Text | 64 | France Only |
|  | Zone Code | Text | 64 | Zone code if any |
|  | Zone Desc | Text | 64 | Zone description if any |
|  | Region Code | Text | 64 | Region code if any |
|  | Region Desc | Text | 64 | Region description if any |
|  | Sector code | Text | 64 | Sector code if any |
|  | Sector Desc | Text | 64 | Sector description if any |
|  | UGA\_HBA | Text | 64 | (France Only) |

##### Service data structure

CCM will provide a service (SOAP) to get the list of territory alignment as master data **for the commercial role** (Other roles will be defined and maintained in a table within in CCM).

The source system for this service is Tibco. Target system is Pega CCM.

The XML expected for territory alignment will have the following structure:

###### Territory Alignment XSD/XML

|  |
| --- |
| <xs:schema attributeFormDefault="unqualified" elementFormDefault="qualified" xmlns:xs="http://www.w3.org/2001/XMLSchema">  <xs:element name="Response">  <xs:complexType>  <xs:sequence>  <xs:element name="TerritoryAlignment" maxOccurs="unbounded" minOccurs="0">  <xs:complexType>  <xs:sequence>  <xs:element type="xs:int" name="LocalCustomerID1"/>  <xs:element type="xs:string" name="SourceSystem"/>  <xs:element type="xs:string" name="CountryCode"/>  <xs:element type="xs:string" name="SalesOrganization"/>  <xs:element type="xs:string" name="PersonCode"/>  <xs:element type="xs:string" name="PersonName"/>  <xs:element type="xs:string" name="Role"/>  <xs:element type="xs:string" name="Affiliation"/>  <xs:element type="xs:string" name="Phone1"/>  <xs:element type="xs:string" name="Fax"/>  <xs:element type="xs:string" name="Address1"/>  <xs:element type="xs:string" name="Address2"/>  <xs:element type="xs:string" name="PostalCode"/>  <xs:element type="xs:string" name="City"/>  <xs:element type="xs:string" name="Email1"/>  <xs:element type="xs:string" name="NetworkCode"/>  <xs:element type="xs:string" name="NetworkDesc"/>  <xs:element type="xs:string" name="ZoneCode"/>  <xs:element type="xs:string" name="ZoneDesc"/>  <xs:element type="xs:string" name="RegionCode"/>  <xs:element type="xs:string" name="RegionDesc"/>  <xs:element type="xs:string" name="SectorCode"/>  <xs:element type="xs:string" name="SectorDesc"/>  <xs:element type="xs:string" name="UGA\_HBA"/>  </xs:sequence>  </xs:complexType>  </xs:element>  </xs:sequence>  </xs:complexType>  </xs:element>  </xs:schema> |

Example:

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Response>  <TerritoryAlignment>  <LocalCustomerID1>1000038</LocalCustomerID1>  <SourceSystem>CEP</SourceSystem>  <CountryCode>FR</CountryCode>  <SalesOrganization></SalesOrganization>  <PersonCode>FR43392</PersonCode>  <PersonName>SIMON, ALAIN</PersonName>  <Role>REPS\_PH</Role>  <Affiliation></Affiliation>  <Phone1></Phone1>  <Fax></Fax>  <Address1></Address1>  <Address2></Address2>  <PostalCode></PostalCode>  <City></City>  <Email1></Email1>  <NetworkCode></NetworkCode>  <NetworkDesc></NetworkDesc>  <ZoneCode></ZoneCode>  <ZoneDesc></ZoneDesc>  <RegionCode></RegionCode>  <RegionDesc></RegionDesc>  <SectorCode></SectorCode>  <SectorDesc></SectorDesc>  <UGA\_HBA></UGA\_HBA>  </TerritoryAlignment>  <TerritoryAlignment>  <LocalCustomerID1>1006316</LocalCustomerID1>  <SourceSystem>CEP</SourceSystem>  <CountryCode>FR</CountryCode>  <SalesOrganization></SalesOrganization>  <PersonCode>FR42196</PersonCode>  <PersonName>LECLERC, ALETH</PersonName>  <Role>REPS\_PH</Role>  <Affiliation></Affiliation>  <Phone1></Phone1>  <Fax></Fax>  <Address1></Address1>  <Address2></Address2>  <PostalCode></PostalCode>  <City></City>  <Email1>aleth.leclerc@sanofi.com</Email1>  <NetworkCode></NetworkCode>  <NetworkDesc></NetworkDesc>  <ZoneCode></ZoneCode>  <ZoneDesc></ZoneDesc>  <RegionCode></RegionCode>  <RegionDesc></RegionDesc>  <SectorCode></SectorCode>  <SectorDesc></SectorDesc>  <UGA\_HBA></UGA\_HBA>  </TerritoryAlignment>  </Response> |

#### [Service] Products from backend

#### General Assumption

The data structure of products for France is the same as the one defined for core.

The products are received from backend and stored in a table in CCM. A SOAP service will be exposed from CCM and will get the delta changes related to a product.

At initiation, a CSV file will be loaded in CCM to fill in this table.

##### Core Model

Product data structure is defined at core model, Pega CCM will expose a service to get product details and save it in Pega CCM.

A synchronous connector from Pega CCM to backend getting the products per Batch ID is described later in this document (See Get Batch details)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| *#* | *Columns in CCM* | *Type* | *Length* | *Description* |
|  | **Source System (Key)** | Text | 10 | (Key) Source system |
|  | **Product SAP Id(Key)** | Number | 18 | (Key) Unique reference of a product (GMID code) |
|  | **Country Code (Key)** | Text | 3 | (Key) Country of the sales Area. (ISO code, 2 characters). |
|  | Country Label | Text | 50 | Country Label |
|  | Product Local Code | Number | 18 | National code, |
|  | Product Desc1 | Text | 40 | Description of the local code as defined in the local registration. |
|  | EAN code | Text | 18 | European Article Numbering |
|  | Dosage Strength | Text | 40 | 22mg strength of the drug |
|  | Dosage Form | Text | 40 | Dosage form |
|  | Unit of measure | Text | **3** | **Base** Unit of measure |
|  | Group Article 1 | Text | 3 | To identify products which are not required to be returned, customers are requested to destruct that kind of products. |
|  | Weight | Number | 13 | Product Weight |
|  | Weight Unit | Text | 3 | Product Weight Unit |
|  | Sales Organization | Text | 4 |  |
|  | Distribution channel | Text | 2 |  |
|  | Sales Division | Text | 2 |  |

###### Products XSD/XML

|  |
| --- |
| <xs:schema attributeFormDefault="unqualified" elementFormDefault="qualified" xmlns:xs="http://www.w3.org/2001/XMLSchema">  <xs:element name="Response">  <xs:complexType>  <xs:sequence>  <xs:element name="Products">  <xs:complexType>  <xs:sequence>  <xs:element name="Product" maxOccurs="unbounded" minOccurs="0">  <xs:complexType>  <xs:sequence>  <xs:element type="xs:string" name="SourceSystem"/>  <xs:element type="xs:int" name="ProductSAPID"/>  <xs:element type="xs:string" name="CountryCode"/>  <xs:element type="xs:string" name="CountryLabel"/>  <xs:element type="xs:string" name="ProductLocalCode"/>  <xs:element type="xs:string" name="ProductDesc1"/>  <xs:element type="xs:int" name="EANCode"/>  <xs:element type="xs:short" name="DosageStrength"/>  <xs:element type="xs:string" name="DosageForm"/>  <xs:element type="xs:string" name="UnitOfMeasure"/>  <xs:element type="xs:string" name="GroupArticle1"/>  <xs:element type="xs:byte" name="Weight"/>  <xs:element type="xs:string" name="WeightUnit"/>  <xs:element type="xs:string" name="SalesOrganization"/>  <xs:element type="xs:string" name="DistributionChannel"/>  </xs:sequence>  </xs:complexType>  </xs:element>  </xs:sequence>  </xs:complexType>  </xs:element>  </xs:sequence>  </xs:complexType>  </xs:element>  </xs:schema> |

Sample:

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Response>  <Products>  <Product>  <SourceSystem>CEP</SourceSystem>  <ProductSAPID>998798798</ProductSAPID>  <CountryCode>FR</CountryCode>  <CountryLabel>France</CountryLabel>  <ProductLocalCode>FR67657</ProductLocalCode>  <ProductDesc1>Adlyxin</ProductDesc1>  <EANCode>00990879</EANCode>  <DosageStrength>500</DosageStrength>  <DosageForm>Gelule</DosageForm>  <UnitOfMeasure>mg</UnitOfMeasure>  <GroupArticle1>Prescription</GroupArticle1>  <Weight>20</Weight>  <WeightUnit>g</WeightUnit>  <SalesOrganization>SWF1</SalesOrganization>  <DistributionChannel>PH</DistributionChannel>  </Product>  <Product>  <SourceSystem>CEP</SourceSystem>  <ProductSAPID>435345345</ProductSAPID>  <CountryCode>FR</CountryCode>  <CountryLabel>France</CountryLabel>  <ProductLocalCode>FR67657</ProductLocalCode>  <ProductDesc1>Rifadin</ProductDesc1>  <EANCode>0065767</EANCode>  <DosageStrength>1000</DosageStrength>  <DosageForm>Gelule</DosageForm>  <UnitOfMeasure>mg</UnitOfMeasure>  <GroupArticle1>Prescription</GroupArticle1>  <Weight>87</Weight>  <WeightUnit>g</WeightUnit>  <SalesOrganization>SWF1</SalesOrganization>  <DistributionChannel>VM</DistributionChannel>  </Product>  </Products>  </Response> |

### [Service] eDelegation

#### Core Model

eDelegation contains master data for Finance about employees with delegation level. Not all Sanofi employees have eDelegation level.

eDelegation information includes employee details and level details (amount of money in a given currency). Both information types are coming in two separate messages, each one with a different message format. Each Event is sent in a separate message. The link between the employee message and level message is to include the level inside the employees message format. There is a one-to-one relationships between employees and level, means that one employee can only belong to a level.

The employees message format contains the following fields:, Pega CCM will be storing only details related to the employee and Finance Bp ( The Authority out , CFO validation will not be kept in Pega CCM)

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Event** |  |  | | |  |  | | |  | **Type** | **Length** | **Format** |
|  | EmployeeOut | | | |  |  | | |  | complex | N/A | N/A |
|  |  | EmployeeInfoOut | | | | | | |  | complex | N/A | N/A |
|  |  |  | | UserId | | | |  |  | string | 256 | Used by Pega CCM to identify the Operator. |
|  |  |  | | EmployeeId | | | | |  | string | 256 | Windows network login |
|  |  |  | | LocalCurrency | | | | |  | string | 256 | Local Currency |
|  |  | AuthorityOut | | | | |  | |  | complex | N/A | N/A |
|  |  |  | | UserDoaLevel | | | | |  | string | 256 | PRODUCTID in LEVEL list |
|  |  |  | | EffectiveDateOfAuthority | | | | | | date | N/A | YYYY-MM-DD pattern |
|  |  |  | | EndDateOfAuthority | | | | | | date | N/A | YYYY-MM-DD pattern |
|  |  | FinanceBpOut | | | | |  | |  | complex | N/A | N/A |
|  |  |  | FinValLevel | | | | | |  | string | 256 | PRODUCTID in LEVEL list |
|  |  |  | FinValStartDate | | | | | |  | date | N/A | YYYY-MM-DD pattern |
|  |  |  | FinValEndDate | | | | | |  | date | N/A | YYYY-MM-DD pattern |
|  |  | CfoValidationOut | | | | | | |  | complex | N/A | N/A |
|  |  |  | CfoLevel | | | | | |  | string | 256 | PRODUCTID in LEVEL list |
|  |  |  | CfoValStartDate | | | | | |  | date | N/A | YYYY-MM-DD pattern |
|  |  |  | CfoValEndDate | | | | | |  | date | N/A | YYYY-MM-DD pattern |
|  |  | SystemOut | | | | | |  |  | complex | N/A | N/A |
|  |  |  | ModDate | | | | | |  | dateTime | N/A | YYYY-MM-DDThh:mm:ss(+|-hh:mm) |
|  |  |  | ModVersion | | | | | |  | decimal |  | N/A |
|  |  | \* |  | | | | |  |  | any | N/A | N/A |
|  | ActionCode | | | | | | |  |  | string | N/A | "CREATE", "UPDATE", "DELETE" or "UNKNOWN\_OR\_IMPACTED" |
|  | EventId | | | | | | |  |  | integer |  | N/A |

If generic message from eDelegation contains EMPLOYEE record for creation action, this employee is sent to consuming applications only if at least one of following fields is filled with a level:

* USER\_DOA\_LEVEL
* FIN\_VAL\_LEVEL
* CFO\_VAL\_LEVEL

If generic message from eDelegation contains EMPLOYEE record for update or delete action this employee is sent to consuming application if it matches following conditions:

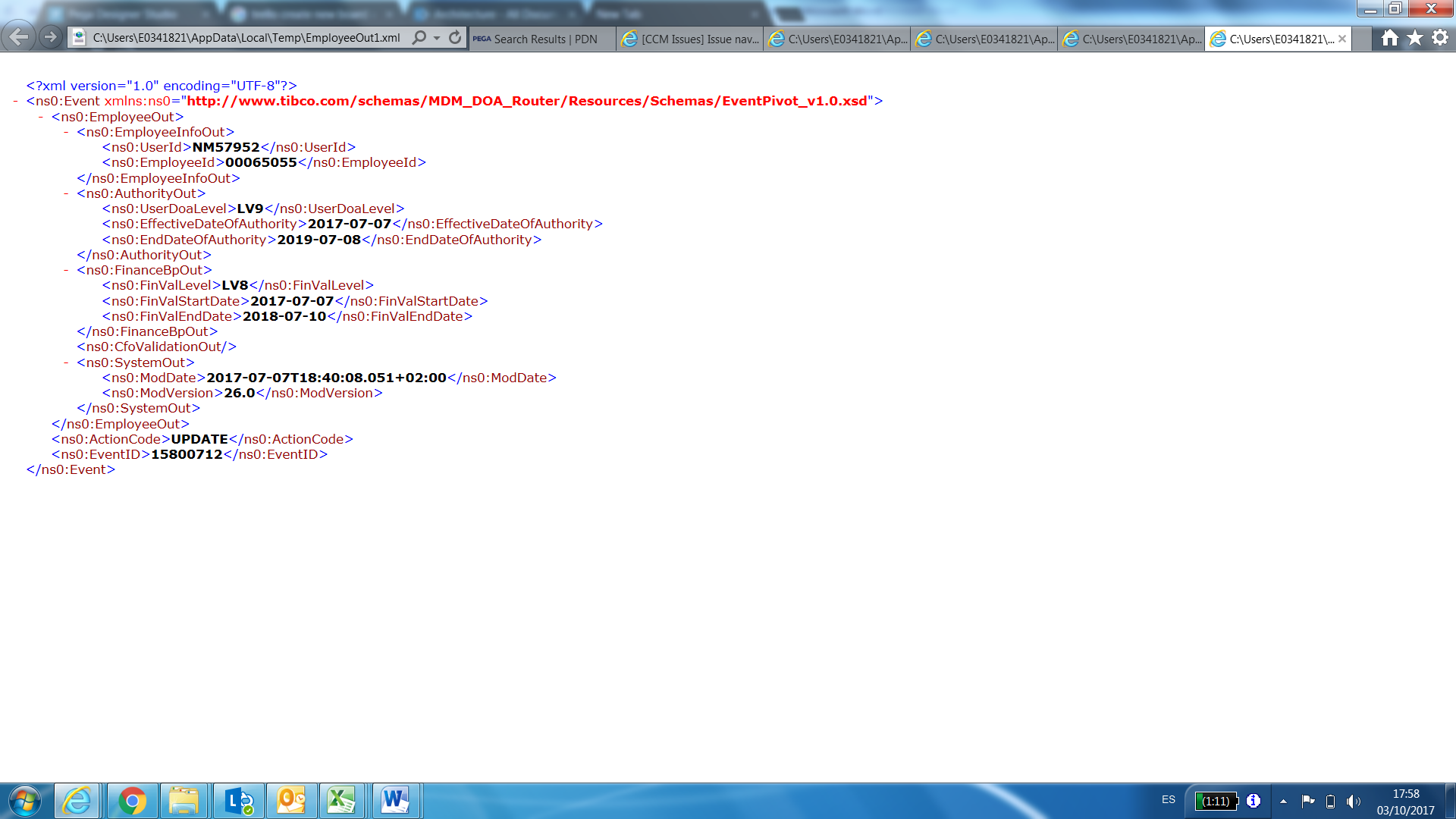
* at least one of following fields is filled with a level in its current value or previous one (called OriginalValue in generic message from eDelegation):
  + USER\_DOA\_LEVEL
  + FIN\_VAL\_LEVEL
  + CFO\_VAL\_LEVEL

AND

* in update case, at least one of the following field is changed:
  + USER\_ID
  + EMPLOYEE\_ID
  + USER\_DOA\_LEVEL
  + USER\_EFFECTIVE\_DATE\_OF\_AUTHORITY
  + USER\_END\_DATE\_OF\_AUTHORITY
  + FIN\_VAL\_LEVEL
  + VAL\_START\_DATE
  + VAL\_END\_DATE
  + CFO\_VAL\_LEVEL
  + CFO\_START\_DATE
  + CFO\_END\_DATE
  + LOCAL\_CURRENCY

NB: A consequence of this routing rule is ModVersion of pivot message can "jump" some eDelegation versions in case of "not-published" field update.

Here is an example of the Employee message in its XML format

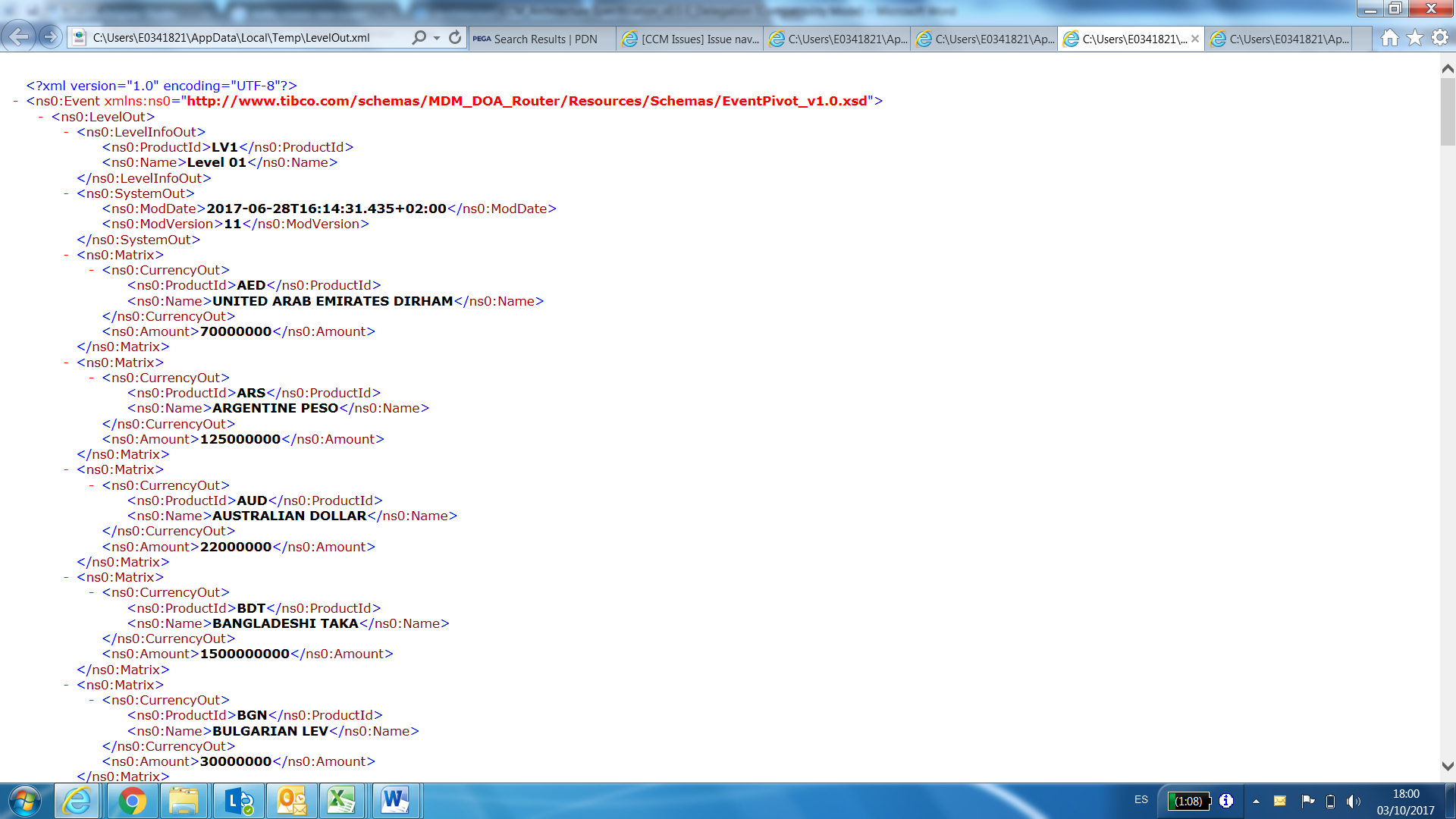


The **level message format** contains the following fields:

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Event** |  |  |  | | | |  | **Type** | **Length** | **Format** |
|  | LevelOut |  |  | | | |  | complex | N/A | N/A |
|  |  | LevelInfoOut | | | | |  | complex | N/A | N/A |
|  |  |  | ProductId | | | |  | string | 255 | N/A |
|  |  |  | Name | | | |  | string | 256 | N/A |
|  |  | SystemOut | | | | |  | complex | N/A | N/A |
|  |  |  | ModDate | | | |  | dateTime |  | YYYY-MM-DDThh:mm:ss(+|-)hh:mm |
|  |  |  | ModVersion | | | | | integer |  | N/A |
|  |  | Matrix |  | | | |  | complex | N/A | N/A |
|  |  |  | CurrencyOut | | | | | complex | N/A | N/A |
|  |  |  |  | ProductId | | | | string | 255 | PRODUCTID in CURRENCY list |
|  |  |  |  | Name | | | | string | 256 | NAME in CURRENCY list |
|  |  |  | Amount |  | | | | decimal |  | N/A |
|  | ActionCode | |  |  | | | | string | N/A | "CREATE", "UPDATE", "DELETE" or "UNKNOWN\_OR\_IMPACTED" |
|  | EventId | |  | |  |  | | integer |  | N/A |

If generic message from eDelegation contains DOA\_LEVEL record for creation, update or delete action, this level is sent to consuming applications with all relationships with CURRENCY records including related AMOUNT.

Here is an example of the Level message in its XML format

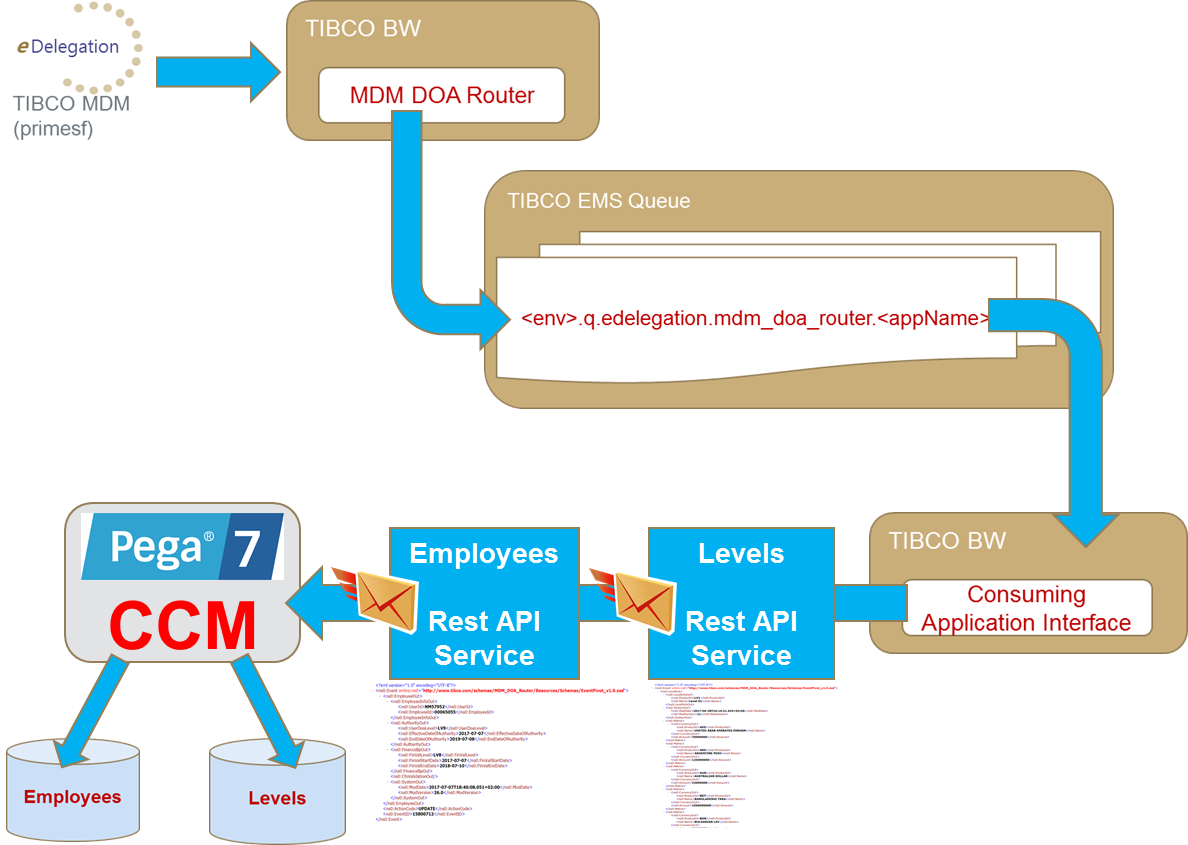


eDelegation is by default sending the details for only Sanofi employees with eDelegation Level. Approximately it could be around 22.000 records. Each employee record received will be mapped with an existing Operator Id record in CCM. If an Operator ID in CCM is not found with the “User ID” information this record is not stored into CCM data model.

eDelegation employee information will be stored in one table (described below) within CCM data model. eDelegation level information will be stored in a separate table within CCM data model. Both tables will be the inputs for the CCM eDelegation validation process.

Before storing the employee details, Pega CCM will check if the “UserID” already exist in Pega CCM operators records (Managed in Pega CCM admin portal) . If the “UserID” do not exist in Pega CCM operator records then it will not be saved. (This will prevent storing details about employees which are not using Pega CCM).

Pega CCM will save one single table to store all the operators, this table will define a column to identify the country to which operator belongs.



eDelegation is sending employee and level information to CCM through Tibco BW layer. CCM will open two SOAP services using XML to receive the e-delegation information. Tibco BW Layer shall build a connector to consume the SOAP services:

1. One for employees.
2. One for levels.

Pega CCM System will be ready to receive both files separately in real time.

The initial load is a specific process in eDelegation Solution to send:

* employee messages of each employee with a level
  + USER\_DOA\_LEVEL
  + FIN\_VAL\_LEVEL
  + CFO\_VAL\_LEVEL
* all levels

No specific rules have to be managed by consuming application.

After the first load, eDelegation Solution would send employees file and level file including only the Deltas (any new employees, levels, update of employee information or level details, etc).

#### [Table in CCM] E-Delegation Levels

|  |  |  |  |
| --- | --- | --- | --- |
| Column | Size | Type | Description |
| LevelID (KEY) | 2 | Text |  |
| Name | 64 | Text |  |
| Currency (KEY) | 3 | Text |  |
| Currency Name | 64 | Text |  |
| Amount |  |  |  |

#### [Table in CCM] E-Delegation Users

We are saving into this table only the lines related to the “Finance BP Out”.

|  |  |  |  |
| --- | --- | --- | --- |
| Column | Size | Type | Description |
| UserID ( KEY) | 64 | Text | “UserID” As received from the XML. It will be checked against the operator ID in Pega. |
| LevelID (KEY) | 3 | Text | Level ID as received from the XML |
| StartDate |  | DateTime | Start effective date |
| EndDate |  | DateTime | End effective date |

#### E-Delegation decision table in CCM

As E-delegation is not providing the operator that should approve the Unblocking of an amount in CCM; we should define a decision table in CCM that will identify the operators to be involved in the “DOA approval process”.

This decision table and the process of DOA validation is explained in the E-delegation functional specification (P49031\_FS\_DOAFinance BP Validation)

### [Connectors] Real Time SOAP connectors

#### Operator structure

The operator structure is send in each request to backend to keep treacability of the operator in CCM executing the request.

This operator structure will have the following fields:

<Operator>

<OperatorID>OPERATOR ID</OperatorID>

<SalesAreas>

LIST OF SALES AREAS OPERATOR IS ALLOWED TO USE.

<SalesArea>

<SalesOrganization>SALES ORG</SalesOrganization>

<SalesDivision>DIVISION</SalesDivision>

<DistributionChannel>DISTRIBUTION CHANNEL</DistributionChannel>

</SalesArea>

</Operator>

Example:

<Operator>

<OperatorID>FR76576</OperatorID>

<SalesAreas>

<SalesArea>

<SalesOrganization>SWF1</SalesOrganization>

<SalesDivision>SFDI</SalesDivision>

<DistributionChannel>VM</DistributionChannel>

</SalesArea>

<SalesArea>

<SalesOrganization>SWF1</SalesOrganization>

<SalesDivision>SFDI</SalesDivision>

<DistributionChannel>HP</DistributionChannel>

</SalesArea>

</SalesAreas>

</Operator>

The following connectors from CCM to backend were identified:

#### Get Estimated Price

CCM will have to calculate the estimated value for each case, this estimated value is calculated based on the Net Amounts of items lines selected from a transactional search or from the list of prices related to the GMIDs selected by the agent. This connector will help getting the estimated price based on a list of products (defined by a GMID) and quantities claimed.

Note: SAP requires a Plant code in order to execute the price calculation, Since Pega CCM is not providing any Plant code; SAP will be taken a Plant code by default.

##### Request

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Field** | **Type** | **Length** | **Description** |
|  | Source system Code | Text | 10 | Source system of the customer |
|  | Customer SAP Code | Text | 10 | Customer SAP Code |
|  | Products | LIST |  | The list of products will have the following fields:   * Product Code (Text): GMID Code. **(Required)** * Quantity (Number): Quantity claimed **(Optional)** * Line Identifier (Number): A reference line number will be communicated by Pega CCM and will help associating the prices returned in the result to the original lines in Pega CCM. **(Required)**   If quantity is kept empty then backend will set quantity = 1. |
|  | Sales Organization | Text | 4 | Related to the customer sales organization of the claim. |
|  | Sales Division | Text | 2 | Related to the customer Division of the claim. |
|  | Distribution channel | Text | 2 | Related to the customer Distribution channel of the claim. |
|  | Price Date | Date | 8 | YYYYMMDD. Will be defaulted by Pega CCM to today’s date. |
|  | Operator | Structure |  | [Check Operator structure](#_Operator_structure) |

##### Response

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Field** | **Type** | **Length** | **Description** |
|  | Products | LIST |  | The list of products will have the following fields:   * Product SAP ID (Text) * Quantity (Number) * Line Identifier * Price (Number) = Unit Price \* Quantity (If Any) * Unit Price (Number): Catalogue Price. * Currency (Text) |
|  |  |  |  |  |

##### XSD/XML

Request:

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Request>  <SourceSystem>CEP</SourceSystem>  <CustomerSAPCode>998798798</CustomerSAPCode>  <Products>  <Product>  <ProductSAPID>909898798</ProductSAPID>  < LineIdentifier >11</ LineIdentifier >  </Product>  <Product>  <ProductSAPID>909898798</ProductSAPID>  < LineIdentifier >12</ LineIdentifier >  </Product>  </Products>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>PH</DistributionChannel>  <PriceDate>20171209</PriceDate>  <Operator>  <OperatorID>FR76576</OperatorID>  <SalesAreas>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>VM</DistributionChannel>  </SalesArea>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>HP</DistributionChannel>  </SalesArea>  </SalesAreas>  </Operator>  </Request> |

Response:

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Response>  <Products>  <Product>  <ProductSAPID>909898798</ProductSAPID>  < LineIdentifier >11</ LineIdentifier>  <Price>1.5</Price>  <Currency>EUR</Currency>  </Product>  <Product>  <ProductSAPID>909898798</ProductSAPID>  < LineIdentifier >12</ LineIdentifier>  <Price>25</Price>  <Currency>EUR</Currency>  </Product>  </Products>  </Response> |

#### [Connector] Get Batch Details

CCM will have to get details about expiration dates, creation date, SSL (Short shelf date). The following connector will bring the batch details to be used in CCM (Part of the policy matrix).

##### Request

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Field** | **Type** | **Length** | **Description** |
|  | Source system Code | Text(**Required**) | 10 | Source system |
|  | Product SAP ID | Text (Optional) | 18 | GMID product code |
|  | Product Batch ID | Text (**Required**) | 10 | Batch ID |
|  | Sales Organization | Text(**Required**) | 4 | Related to the customer sales organization of the claim. |
|  | Sales Division | Text(**Required**) | 2 | Related to the customer Division of the claim. |
|  | Distribution channel | Text(**Required**) | 2 | Related to the customer Distribution channel of the claim. |
|  | Operator | Date Structure |  | [Check Operator structure](#_Operator_structure) |

##### Response

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Field** | **Type** | **Length** | **Description** |
|  | Products | LIST |  | A list of products could be returned :  The fields for each product are described below. |
|  | Product Batch ID | Text | 10 | Batch ID |
|  | ProductSAPID | Text |  | GMID code of a Product |
|  | Manufacturing date | Text | 8 | YYYYMMDD |
|  | Expiry date | Text | 8 | YYYYMMDD |
|  | Remaining Shelf life (RSL) | Text | 8 | Format is X D/W/M/Y (X is a integer) , it will represent the period from the expiry date on which the product may no longer be sold. |
|  | Shelf life | Text | 8 | YYYYMMDD. This value is calculated by backend following the formula:  Expiry date - Remaining Shelf life |

###### Response Message

The message block is optional, will contain error message returned from backend. If the error is related to an item level, then item number will be described in the Message Label.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Field | Type | Length | Description |
|  | Message Type | Text | 1 | 4 values are possible [Error, Success, Information, Warning] |
|  | Message class | Text | 20 | Optional |
|  | Message Id | Text | 3 | Optional |
|  | Message Label | Text | 220 | Optional |

##### XSD/XML

Request:

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Request>  <SourceSystem>CEP</SourceSystem>  <ProductSAPID></ProductSAPID>  <ProductBatchID>0056</ProductBatchID>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>PH</DistributionChannel>  <Operator>  <OperatorID>FR76576</OperatorID>  <SalesAreas>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>VM</DistributionChannel>  </SalesArea>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>HP</DistributionChannel>  </SalesArea>  </SalesAreas>  </Operator>  </Request> |

Response:

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Response>  <Products>  <Product>  <ProductSAPID>2131231</ProductSAPID>  <ProductBatchID>0056</Product BatchID>  <ManufacturingDate>20170101</ ManufacturingDate>  <ExpiryDate>20180101< /ExpiryDate>  <RSL>2M</RSL>  < ShelfLife>20171001</ ShelfLife>  </Product>  </Products>  </Response>  <Message>  <Type></Type>  <Class></Class>  <Id></Id>  <Label></Label>  </Message> |

#### [Connector] Get Recent Documents

*Connector means: Request from CCM to backend*

This connector is called at the initiation of customer 360 view; this connector will provide details about

* List of recent orders and related product items
* List of Deliveries and related product items
* List of Invoices / Credit Memos and related product items.

##### Connector details

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***Connector name*** | ***type*** | ***protocol*** | ***Format*** | ***Wsdl URL*** |
| GetRecentDocuments | Synchronous | SOAP | XML Format |  |

##### Connector Request/Response

###### Request

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Request field** | **Type** | **Length** | **Description** |
|  | Customer SAP Code (Sold To) | Text | 10 | Customer code stored in CCM master data table |
|  | Source System | Text | 10 | Related to customer and stored in master data in CCM. |
|  | Start date | Date | 8 | Will search on the creation date of the document.  If No reference document is provided then this date will be defaulted to :   * + - * Current Date – X months.   (X months should be = 2 if customer Group is Wholesaler, or to 12 for other customer group) |
|  | End date | Date | 8 | If No reference document is provided then this date will be defaulted to :  Current Date. |
|  | Sales Organization of the customer | Text | 4 | Related to customer and stored in master data in CCM |
|  | Division of the customer | Text | 2 | Related to customer and stored in master data in CCM |
|  | Distribution Channel of the customer | Text | 2 | Related to customer and stored in master data in CCM |
|  | Document Type.  Will have one of the following values:  \*ORDER  \*DELIVERY  \*INVOICE  \*DELIVERYGROUP | Text |  | **VERY IMPORTANT**  IF empty will bring the recent orders, deliveries and invoices and also the documents which are related or referenced.  If filled, it should bring the   * + - * Order and its referenced documents, if type = “ORDER”       * Delivery and its referenced documents if type= “DELIVERY” or “DELIVERYGROUP”.       * Invoice block and its referenced documents if type = “INVOICE”. |
|  | Reference document | Text | 10 | Reference document value |
|  | Order Type Code | Text | 4 | Order type code, relevant when the Type= Order. |
|  | Language Code | Text | 3 | ISO language code (as mentioned in the language code table in this document), will drive the language of labels returned by backend. |
|  | Operator ID | Text | 12 | Operator ID (Sanofi ID), it will reflect the operator ID of user triggering this request. |
|  | Sales Areas | LIST |  | Will contain the list of sales areas the operator belongs to, It will help backend filter the results if needed based on the sales area. This list will contain the following fields.   * Sales Org * Sales Div * Distribution channel |

###### Response

Please refer to the data structure described in this document for every block listed in the response.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Response field** | **Type** | **Length** | **Description** |
|  | Customer SAP Code (Sold To) | Text | 10 | Customer code stored in CCM master data table |
|  | Orders | List of Orders (See data structure) | 10 | Will contain a list , each order have a header and list of items  >Orders[LIST] <See Order structure below>  >>Order Header  >>Order Items[1.N] |
|  | Deliveries | List of Deliveries (See data structure) | 10 | Will contain a list , each delivery have a header and list of items  >Deliveries[LIST] <See Delivery structure below>  >>Delivery Header  >>Delivery Items[1.N] |
|  | Invoices | List of Invoices (See data structure) | 10 | Will contain a list , each invoice have a header and list of items  >Invoices[LIST] <See Invoice structure below>  >>Invoice Header  >>Invoice Items[1.N] |

##### Order data structure

###### Order Header

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Label** | **Type** | **Length** | **Description** |
|  | Order type code | Text | 4 | Order type code (CEP,SHIFT) |
|  | Order type label | Text | 20 | Order type label (CEP,SHIFT) |
|  | Order Number (Key) | Text | 10 | Order Number (Key) (CEP,SHIFT) |
|  | Purchase Order Number | Text | 10 | Purchase Order Number (CEP,SHIFT) |
|  | Net Amount | Number | 15 | Can be negative amount (Negative Sign) (CEP,SHIFT) |
|  | Tax Amount | Decimal | 15 | Only the Tax amount (CEP,SHIFT) |
|  | TotalAmountToBePaid | Decimal | 15 | Total amount to be paid including discount, taxes and surcharges. |
|  | Currency | Text | 5 | ISO Code 3 characters (CEP,SHIFT) |
|  | Created By (Sanofi internal/External operator) | Text | 90 (10+40+40) | Will display the name of the operator. If the user who created the order is technical, then it will display the system name otherwise backend will provide the name of this operator. The name is made up those concatenated fields by space :  <User SAP ID>  <First name> <Last name>  (CEP,SHIFT) |
|  | Global Status code | Text | 4 | This Status code should have the values describes In table below  (CEP,SHIFT) |
|  | Creation Date | Date | 8 | YYYYMMDD  (CEP,SHIFT) |
|  | Creation Time | Time | 6 | HHmmss (CEP,SHIFT) |
|  | Requested Delivery Date | Date | 8 | YYYYMMDD (CEP,SHIFT) |
|  | Invoice block code | Text | 2 | Block Code (CEP,SHIFT) |
|  | Invoice block Label | Text | 20 | Label , Based on language code in the request (CEP,SHIFT) |
|  | Delivery block code | Text | 2 | Block Code (CEP,SHIFT) |
|  | Delivery Block Label | Text | 20 | Label , Based on language code in the request (CEP,SHIFT) |
|  | Ship-To Customer Code | Text | 10 | Ship to customer SAP Code (CEP,SHIFT) |
|  | Ship To Customer Name | Text | 40 | Customer name |
|  | Sold-To Customer Code | Text | 10 | Sold to customer as mentioned in the request. (CEP,SHIFT) |
|  | Sold To Customer Name | Text | 40 | Customer Name |
|  | Related documents | Boolean | 1 | A flag to indicate if any other documents are related to this order. (CEP,SHIFT) |

###### Order Global Status (Values)

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Label** | **Code** | **Description** |
| **1** | Pending | P | if there is no delivery yet |
| **2** | Credit blocked | CP | if the order is blocked |
| **3** | In preparation | OIP | if there is delivery but no goods issue yet |
| **4** | Delivered | OD | if goods issue posted:  if all items have goods issue |
| **5** | Partially delivered | PD | if goods issue posted for some of the items and if there are still open items on the order without delivery |
| **6** | Partially invoiced | OPIV | if some of the non-rejected items were invoiced. |
|  | Invoiced | OIV | if all not rejected items were invoice |
| **7** | Cancelled | OR | if all items are rejected on the order |

###### Order Items

Characters limit are not taken into account in CCM, as those fields will not be updated by agents in CCM. Those fields will be ready only in CCM.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Label | Type | Length | Description |
|  | Order Number (Key) | Text | 10 | Unique Order number (CEP,SHIFT) |
|  | Order Item Number(Key) | Text | 6 | n° interne SAP (CEP,SHIFT) |
|  | Creation Date | Date | 8 | YYYYMMDD  Needed at the item level. (CEP,SHIFT) |
|  | Creation Time | Time | 6 | HHmmss.  Needed also at the item level. (CEP,SHIFT) |
|  | Delivery Number(Key) | Text | 10 | Unique Delivery number (CEP,SHIFT) |
|  | Delivery Item | Text | 6 | n° interne SAP |
|  | Invoice Number | Text | 10 | Unique Invoice number (CEP,SHIFT) |
|  | Invoice Item | Text | 6 | n° interne SAP (CEP,SHIFT) |
|  | SAP Product code | Text | 18 | GMID code (CEP,SHIFT) |
|  | SAP Product Desc | Text | 40 | Product description |
|  | Quantity | Number | 13 | Positive number (Integer no decimal) (CEP,SHIFT) |
|  | Unit | Text | 3 | Unit (CEP,SHIFT) |
|  | Tax Percentage | Decimal | 15 |  |
|  | Tax Amount | Decimal | 15 |  |
|  | Discount Percentage | Decimal | 15 |  |
|  | Discount Amount | Decimal | 15 |  |
|  | Net Amount | Number | 15 | Could be Negative with sign.  The Net amount is the Order amount including discount.  (CEP,SHIFT) |
|  | Unit Price | Decimal | 15 | Unit price of the product |
|  | Currency | Text | 5 | Currency ISO code 3 characters (CEP,SHIFT) |

##### Delivery data structure

###### Delivery Header

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Field | Type | Length | Description |
|  | Delivery Number (Key) | Text | 10 | Unique delivery number code (CEP,SHIFT) |
|  | Creation date | Date | 8 | (YYYYMMDD) (CEP,SHIFT) |
|  | Delivery Group Number | Text | 20 | Group Delivery number (CEP,SHIFT) |
|  | Delivery type Code | Text | 4 | Normal delivery or return (CEP,SHIFT) |
|  | Delivery type Label | Text | 20 | Label (CEP,SHIFT) |
|  | Good Issue Date | Date | 8 | (YYYYMMDD) (CEP,SHIFT) |
|  | Customer Ship to Code | Text | 10 | SAP customer code (CEP,SHIFT) |
|  | Customer Ship to name | Text | 40 |  |
|  | Customer Sold to code | Text | 10 | SAP customer code (CEP,SHIFT) |
|  | Customer Sold to name | Text | 40 |  |
|  | Ship to City | Text | 35 (40) | Ship to city  (CEP,SHIFT) |
|  | Transport Company | Text | 35 (40) | The name of the transport company.  (CEP,SHIFT) |
|  | Forwarder Company | Text | 35 (40) | for Export we have Partner transporter and partner forwarder in SAP CEP, here we should be getting the Forwarder.  (CEP,SHIFT) |
|  | Tracking number | Text | 1. 20 | Tracking number will be empty for France. To be replaced by the delivery Number for France. |
|  | Proof of Delivery: the confirmation of customer, (Pending / Yes / No) | Text |  | Not available currently for France. The field is kept for future use.  Should have one of the following values :   * + - * Pending       * Yes       * No |
|  | Total Weight | Number | 15 | Total weight (CEP,SHIFT) |
|  | Net Weight | Number | 15 | Net weight (CEP,SHIFT) |
|  | Unit Weight | Text | 3 | Unit of measure for the weight (CEP,SHIFT) |
|  | Number of packages | Number |  | number of Handling Units in the shipment  (CEP,SHIFT) |
|  | Distribution center | Text | 30 | Distribution center name. |

###### Delivery Items

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Field | Type | Length | Description |
|  | Delivery Number (Key) | Text | 10 | Unique delivery number code (CEP,SHIFT) |
|  | Delivery Item Number (Key) | Text | 6 | n° interne SAP (CEP,SHIFT) |
|  | Creation date | Date | 8 | Creation date (YYYYMMDD) (CEP,SHIFT) |
|  | Creation time | Time | 6 | Create time (HHMMSS) (CEP,SHIFT) |
|  | Order Ref Number | Text | 10 | It will represent the Order number, in case of a return the order number will be of type return. (CEP,SHIFT) |
|  | Order Ref Item | Text | 6 | n° interne SAP (CEP,SHIFT) |
|  | Order type Code | Text | 4 | Order type code (CEP,SHIFT) |
|  | Order type Label | Text | 20 | Order type Label (CEP,SHIFT) |
|  | Invoice Ref Number (Key) | Text | 10 | Unique Invoice number code (CEP,SHIFT) |
|  | Invoice type code | Text | 4 | Invoice type Code (CEP,SHIFT) |
|  | Invoice type Label | Text | 20 | Invoice type Label (CEP,SHIFT) |
|  | Invoice Ref Item | Text | 6 | n° interne SAP (CEP,SHIFT) |
|  | Product SAP Code | Text | 18 | GMID for France (CEP,SHIFT) |
|  | Product SAP Desc | Text | 40 | Product description |
|  | Quantity | Number | 13 | Positive Number (CEP,SHIFT) |
|  | Unit | Text | 3 |  |
|  | Batch ID | Text | 10 | Batch ID is only available at the Delivery and Invoice level (Not at the Order level) (CEP,SHIFT) |
|  | Batch Manufacturing date | Date | 8 | Batch creation date (CEP,SHIFT) |
|  | Batch Expiration date | Date | 8 | Batch expiration date (CEP,SHIFT) |
|  | Batch Remaining Shelf life | Date | 8 | Batch Remaining Shelf life (CEP,SHIFT) |

##### Invoice data structure

###### Invoice Header

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Field | Type | Length | Description |
|  | Invoice Number (Key) | Text | 10 | Unique Invoice number code (CEP,SHIFT) |
|  | Invoice type Code | Text | 4 | to make the difference between an invoice and a credit debit (CEP,SHIFT) |
|  | Invoice type label | Text | 20 | Should handle the language (CEP,SHIFT) |
|  | Customer Sold to code | Text | 10 | SAP customer code (CEP,SHIFT) |
|  | Customer Sold To Name | Text | 40 | Customer Name |
|  | Customer Bill to code | Text | 10 | SAP customer code (CEP,SHIFT) |
|  | Customer Bill To Name | Text | 40 | Customer Name |
|  | Customer Ship to Code | Text | 40 | Customer Ship to code |
|  | Customer Ship to Name | Text | 40 | Customer Ship to name |
|  | Creation date | Date | 8 | Creation date (YYYYMMDD) (CEP,SHIFT) |
|  | Creation time | Time | 6 | Create time (HHMMSS) (CEP,SHIFT) |
|  | Net Value | Decimal | 15 | Could be negative (Negative Sign); With discount. Excluding Tax (CEP,SHIFT) |
|  | Tax Amount | Decimal | 15 | Only the Tax amount (CEP,SHIFT) |
|  | TotalAmountToBePaid | Decimal | 15 | Total amount to be paid including discount, taxes and surcharges. |
|  | Currency | Text | 5 | ISO code 3 characters (CEP,SHIFT) |
|  | Exchange rate | Decimal | 9 | Exchange rate between invoice currency and the currency of the company code (CEP,SHIFT) |
|  | Due date | Text | 8 | Due date of the financial document. (YYYYMMDD)  (CEP,SHIFT) |
|  | Global Status | Text (Limited values) | 3 | Check the invoice status in the table below (CEP,SHIFT) |
|  | Billing date | Text | 8 | (YYYYMMDD) (CEP,SHIFT) |

###### Global Invoice status

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Label** | **Code** | **Description** |
| **1** | Not cleared | INC | Invoice not paid and not overdue yet. |
| **2** | Unpaid | INP | invoice overdue and payment refused by the bank of the customer  (JIRA OPEN: 1039) |
| **3** | Overdue | IOD | if overdue and not paid yet or unpaid |
| **4** | Cleared | IC | if paid |

###### Invoice Items

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Field** | **Type** | **Length** | **Description** |
|  | Invoice Number (Key) | Text | 10 | Unique Invoice number (CEP,SHIFT) |
|  | Invoice Item Number(Key) | Text | 6 | n° interne SAP (CEP,SHIFT) |
|  | Creation date | Text | 8 | Creation date (YYYYMMDD) (CEP,SHIFT) |
|  | Creation time | Text | 6 | Create time (HHMMSS) (CEP,SHIFT) |
|  | Order Ref Number | Text | 10 | Unique Order number as a reference (CEP,SHIFT) |
|  | Order Ref Item | Text | 6 | Item line number (CEP,SHIFT) |
|  | Order Type Code | Text | 4 | Order type code (CEP,SHIFT) |
|  | Order type Label | Text | 20 | Order type description (CEP,SHIFT) |
|  | Delivery Ref Number | Text | 10 | Unique Delivery number (CEP,SHIFT) |
|  | Delivery Ref Item | Text | 6 | n° interne SAP (CEP,SHIFT) |
|  | Product SAP code | Text | 18 | GMID for France (CEP,SHIFT) |
|  | Product SAP Desc | Text | 40 | Product Description |
|  | Quantity | Text | 13 | Positive value (CEP,SHIFT) |
|  | Unit | Text | 3 | Unit (CEP,SHIFT) |
|  | Net Amount | Decimal | 15 | Could be negative value (Negative Sign) (CEP,SHIFT) |
|  | Tax Percentage | Decimal | 15 | Tax percentage for the item. |
|  | Tax Amount | Decimal | 15 | Tax amount for the item |
|  | Discount Percentage | Decimal | 15 |  |
|  | Discount Amount | Decimal | 15 |  |
|  | Unit Price | Decimal | 15 | Unit price of the product |
|  | Currency | Text | 5 | ISO code 3 characters (CEP,SHIFT) |
|  | Batch ID | Text | 8 | Text Batch ID (CEP,SHIFT) |
|  | Batch manufacturing date | Date | 8 | Creation date of the batch (CEP,SHIFT) |
|  | Batch Expiration date | Date | 8 | Batch expiration date (CEP,SHIFT) |
|  | Batch Remaining Shelf life | Date | 8 | Expiration date of the batch (CEP,SHIFT) |
|  | Invoice Reference[1.N] | LIST[] |  | This field is filled in case this invoice is related to another invoice (In case of a Credit Memo invoice)  The list of Invoice will contain:   * Invoice Number * Invoice Net Amount * Invoice Currency |
|  | Return Order | Number | 10 | Return order number. (CEP,SHIFT) |

###### Response Message

The message block is optional, will contain error message returned from backend. If the error is related to an item level, then item number will be described in the Message Label.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Field | Type | Length | Description |
|  | Message Type | Text | 1 | 4 values are possible [Error, Success, Information, Warning] |
|  | Message class | Text | 20 | Optional |
|  | Message Id | Text | 3 | Optional |
|  | Message Label | Text | 220 | Optional |

##### XSD/XML

Request to get recent documents for customer 360

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Request>  <SourceSystem>CEP</SourceSystem>  <CustomerSAPCode>1098098</CustomerSAPCode>  <StartDate>20170101</StartDate>  <EndDate>20171231</EndDate>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>VM</DistributionChannel>  **<Type></Type><!-- Empty for getting all recent documents-->**  **<ReferenceDocument></ReferenceDocument>**  **<OrderTypeCode></OrderType>**  <LanguageCode>FR</LanguageCode>  <Operator>  <OperatorID>FR76576</OperatorID>  <SalesAreas>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>VM</DistributionChannel>  </SalesArea>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>HP</DistributionChannel>  </SalesArea>  </SalesAreas>  </Operator>  </Request> |

Request to get a transactional search (Based on an invoice number)

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Request>  <SourceSystem>CEP</SourceSystem>  <CustomerSAPCode>1098098</CustomerSAPCode>  <StartDate>20170101</StartDate>  <EndDate>20171231</EndDate>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>VM</DistributionChannel>  **<Type>INVOICE</Type><!—Search with an invoice number-->**  **<ReferenceDocument> INV00001</ ReferenceDocument>**  <LanguageCode>FR</LanguageCode>  <Operator>  <OperatorID>FR76576</OperatorID>  <SalesAreas>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>VM</DistributionChannel>  </SalesArea>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>HP</DistributionChannel>  </SalesArea>  </SalesAreas>  </Operator>  </Request> |

Request to get a transactional search (Based on an order number)

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Request>  <SourceSystem>CEP</SourceSystem>  <CustomerSAPCode>1098098</CustomerSAPCode>  <StartDate>20170101</StartDate>  <EndDate>20171231</EndDate>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>VM</DistributionChannel>  **<Type>ORDER</Type><!—Search with an invoice number-->**  **<OrderTypeCode>** **ZWCS</OrderType>**  **<ReferenceDocument> O98798798</ ReferenceDocument>**  <LanguageCode>FR</LanguageCode>  <Operator>  <OperatorID>FR76576</OperatorID>  <SalesAreas>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>VM</DistributionChannel>  </SalesArea>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision>SFDI</SalesDivision>  <DistributionChannel>HP</DistributionChannel>  </SalesArea>  </SalesAreas>  </Operator>  </Request> |
|  |

Response: The response is the same for requests above, the response will include as well the documents referenced.

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Response>  <CustomerSAPCode>1098098</CustomerSAPCode>  <!-- Orders LIST -->  < ListOrders >  <Order>  <Header>  <OrderTypeCode> ZWCS </OrderTypeCode>  <OrderTypeLabel> Cde client standard </OrderTypeLabel>  <OrderNumber>O98798798</OrderNumber>  <PurchaseOrderNumber>5435454</PurchaseOrderNumber>  <NetAmount>2000</NetAmount>  <TaxAmount>200</ TaxAmount>  <TotalAmountToBePaid>2200</ TotalAmountToBePaid>  <Currency>EUR</Currency>  <CreatedBy>FR876878 Jean Chistophe</CreatedBy>  <GlobalStatusCode>OIV</GlobalStatusCode>  <CreationDate>20170311</CreationDate>  <CreationTime>204000</CreationTime>  <RequestedDeliveryDate>20170330</RequestedDeliveryDate>  <InvoiceBlockCode></InvoiceBlockCode>  <InvoiceBlockLabel></InvoiceBlockLabel>  <DeliveryBlockCode></DeliveryBlockCode>  <DeliveryBlockLabel></DeliveryBlockLabel>  <ShipToCustomerCode>134890</ShipToCustomer>  <ShipToCustomerName>Pharmacie du centre</ShipToCustomerName>  <SoldToCustomerCode>8768788</SoldToCustomerCode>  <SoldToCustomerName>Groupement OCP</SoldToCustomerName>  <RelatedDocuments>1</RelatedDocuments>  </Header>  <Items>  <Item>  <OrderNumber>O98798798</OrderNumber>  <OrderItemNumber>1</OrderItemNumber>  <CreationDate>20170311</CreationDate>  <CreationTime>204100</CreationTime>  <DeliveryNumber>D0000001</DeliveryNumber>  <DeliveryItem>1</DeliveryItem>  <InvoiceNumber>INV00001</InvoiceNumber>  <InvoiceItem>1</InvoiceItem>  <SAPProductCode>987989</SAPProductCode>  <SAPProductDesc>ANIXON</SAPProductDesc>  <Quantity>10</Quantity>  <Unit>BOX</Unit>  <NetAmount>1000.00</NetAmount>  <TaxPercentage>20</TaxPercentage>  <TaxAmount>200</TaxAmount>  <DiscountPercentage>1</DiscountPercentage>  <DiscountAmount>10</DiscountAmount>  <UnitPrice>10</UnitPrice>  <Currency>EUR</Currency>  </Item>  </Items>  </Order>  </ ListOrders >  <!-- DELIVERIES LIST -->  <ListDeliveries>  <Delivery>  <Header>  <DeliveryNumber>D0000001</DeliveryNumber>  <CreationDate>20170329</CreationDate>  <DeliveryGroupNumber>GD0000001</DeliveryGroupNumber>  <DeliveryTypeCode></DeliveryTypeCode>  <DeliveryTypeLabel></DeliveryTypeLabel>  <GoodIssueDate>20170329</GoodIssueDate>  <PlannedShipmentEndDate>20170329</PlannedShipmentEndDate>  <CustomerShipToCode>1098098</CustomerShipToCode>  <CustomerShipToName>Pharmacie du cent</CustomerShipToName>  <CustomerSoldToCode>8768788</CustomerSoldToCode>  <CustomerSoldToName>Groupement OCP</CustomerSoldToName>  <ShipToCity>Antony</ShipToCity>  <TransportCompany>TSE EXPRESS</TransportCompany>  <ForwarderCompany>Fedex</ForwarderCompany>  <TrackingNumber></TrackingNumber>  <ProofOfDelivery></ProofOfDelivery>  <TotalWeight>10</TotalWeight>  <NetWeight>8</NetWeight>  <UnitWeight>KG</UnitWeight>  <NumberOfPackages>2</NumberOfPackages>  <DistributionCenter>Amily</DistributionCenter>  </Header>  <Items>  <Item>  <DeliveryNumber>D0000001</DeliveryNumber>  <DeliveryItemNumber>1</DeliveryItemNumber>  <CreationDate>20170329</CreationDate>  <CreationTime>091000</CreationTime>  <OrderRefNumber>O98798798</OrderRefNumber>  <OrderRefItem>1</OrderRefItem>  <OrderTypeCode></OrderTypeCode>  <OrderTypeLabel></OrderTypeLabel>  <InvoiceRefNumber>INV00001</InvoiceRefNumber>  <InvoiceTypeCode></InvoiceTypeCode>  <InvoiceTypeLabel></InvoiceTypeLabel>  <InvoiceRefItem>1</InvoiceRefItem>  <ProductSAPCode>987989</ProductSAPCode>  <ProductSAPDesc>ANIXON</ProductSAPDesc>  <Quantity>10</Quantity>  <Unit>BOX</Unit>  <BatchID>29809</BatchID>  <BatchManufacturingDate>20170301</BatchManufacturingDate>  <BatchExpirationDate>20171212</BatchExpirationDate>  <BatchRemainingShelfLife>20171101</BatchRemainingShelfLife>  </Item>  </Items>  </Delivery>  </ListDeliveries>  <!-- INVOICES LIST -->  <ListInvoices>  <Invoice>  <Header>  <InvoiceNumber>INV00001</InvoiceNumber>  <InvoiceTypeCode></InvoiceTypeCode>  <InvoiceTypeLabel></InvoiceTypeLabel>  <CustomerSoldToCode>8768788</CustomerSoldToCode>  <CustomerSoldToName>Groupement OCP</CustomerSoldToName>  <CustomerBillToCode>8768788</CustomerBillToCode>  <CustomerBillToName>Groupement OC</CustomerBillToName>  <CreationDate>20170328</CreationDate>  <CreationTime>090000</CreationTime>  <NetValue>1000</NetValue>  <ValueWithTax>1200</ValueWithTax>  <Currency>EUR</Currency>  <ExchangeRate></ExchangeRate>  <DueDate>20170601</DueDate>  <GlobalStatus>IC</GlobalStatus>  <BillingDate>20170520</BillingDate>  </Header>  <Items>  <Item>  <InvoiceNumber>INV00001</InvoiceNumber>  <InvoiceItemNumber>1</InvoiceItemNumber>  <CreationDate>20170520</CreationDate>  <CreationTime>090000</CreationTime>  <OrderRefNumber>O98798798</OrderRefNumber>  <OrderRefItem>1</OrderRefItem>  <DeliveryRefNumber>D0000001</DeliveryRefNumber>  <DeliveryRefItem>1</DeliveryRefItem>  <ProductSAPCode>987989</ProductSAPCode>  <ProductSAPDesc>ANIXON</ProductSAPDesc>  <Quantity>10</Quantity>  <Unit>BOX</Unit>  <NetAmount>1000</NetAmount>  <TaxPercentage>20</TaxPercentage>  <TaxAmount>200</TaxAmount>  <DiscountPercentage>1</DiscountPercentage>  <DiscountAmount>10</DiscountAmount>  <UnitPrice>100</UnitPrice>  <Currency>EUR</Currency>  <BatchID>29809</BatchID>  <BatchManufacturingDate>20170301</BatchManufacturingDate>  <BatchExpirationDate>20171212</BatchExpirationDate>  <BatchRemainingShelfLife>20171101</BatchRemainingShelfLife>  <InvoiceReferences>  <Invoice>  <InvoiceNumber>I9999</InvoiceNumber>  <NetAmount>200</NetAmount>  <Currency>EUR</Currency>  </Invoice>  <Invoice>  <InvoiceNumber>I8888</InvoiceNumber>  <NetAmount>100</NetAmount>  <Currency>EUR</Currency>  </Invoice>  </InvoiceReferences>  <ReturnOrder>O234444</ReturnOrder>  </Item>  </Items>  </Invoice>  </ListInvoices>  <Message>  <Type></Type>  <Class></Class>  <Id></Id>  <Label></Label>  </Message>  </Response> |

#### [Connector:] Create Request

*Connector means: Request from CCM to backend*

As part of CCM processes, user needs to trigger the creation of an Order. The final creation of an order is happening in backend, CCM will only trigger the creation of the order and get acknowledgement from backend.

This connector covers the following order types:

* CREDIT\_NOTE
* DEBIT\_NOTE
* STANDARD\_ORDER
* FREE\_OF\_CHARGE\_REPLACEMENT
* RETURN\_PHYSICAL
* RETURN\_PHYSICAL\_WITHOUT\_CREDIT
* RETURN\_N\_PHYSICAL
* REPLACEMENT
* EXTERNAL\_DESTRUCTION
* EXPIRED\_PRODUCT

|  |  |  |  |
| --- | --- | --- | --- |
| ***Connector name*** | ***type*** | ***protocol*** | ***Wsdl URL*** |
| CreateOrder | Synchronous | SOAP/XML |  |

##### Create Order by backend (Request by CCM to backend)

###### Create Request Header

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Field | Type | Length | M/NM | Description |
|  | Customer sold to Code (SAP code) | Text | 10 | M | Unique ID of the customer in SAP |
|  | Customer ship to (SAP code) | Text | 10 | M | Customer Ship to as selected by operator. |
|  | Customer bill to (SAP code) | Text | 10 | NM | Only required when creating orders with any reference to an invoice. |
|  | Customer Payer (SAP code) |  |  | NM |  |
|  | Sales Organization of the customer | Text | 4 | M | Related to the customer sales Org |
|  | Sales Division of the customer | Text | 2 | M | Related to the customer division |
|  | Distribution Channel of the customer | Text | 2 | M | Related to the customer Distribution channel |
|  | Invoice Ref Number | Text | 10 | NM | It will be able to create orders with any reference to an invoice |
|  | Purchase Order Number | Text | 10 | M | Purchase order number (Sales order number from customer side) |
|  | Delivery Number | Text | 10 | NM |  |
|  | Order Number | Text | 10 | NM |  |
|  | Order Type | Text | 4 | M | Required: Order type code (From order type table) related to the source system of the customer. If customer is related to SHIFT then get the Order type code of SHIFT (For instance) |
|  | Order Reason | Text | 3 | M | Required: Order reason code from table in CCM. (Based on source system of the customer) |
|  | Language | Text | 2 | M | Will set the language of the operator creating the request. |
|  | Source System | Text | 10 | M | Source system driven from customer |
|  | Country Code | Text | 3 | M | Country ISO code |
|  | Case ID | Text | 15 | M | CCM Case ID for reference |
|  | Operator | See operator strcuture |  | M |  |
|  | Price date | Text(YYYYMMDD) | 8 | *M* | *Required (*Set to the creation date of the invoice referenced or set by the operator) |
|  | Tax date | Text(YYYYMMDD) | 8 | *M* | *Date on which to apply the taxes. Defaulted to Today’s date.* |
|  | Free Text | Text | *35* | *NM* | *Optional: Some countries like CANADA are using this field to store comments in SAP.* |
|  | PO TYPE | Text | *4* | *M* | *Will have the value = “ZCCM”* |
|  | Requested Delivery Date | Text(YYYYMMDD) | 8 | *M* | *Requested delivery date used for the replacement orders* |

###### Create Request Items lines

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Field** | **Type** | Length |  | **Description** |
|  | Reference Item number | Text | 6 | NM | Should be the item line as referenced in the document. |
|  | Product SAP Code | text | *18* | *M* | *Required - GMID for France* |
|  | Quantity | Number | *13* | *M* | *Required.* |
|  | Unit |  | *3* | *M* | *Required: The Unit will be driven from the Unit referenced in the invoice.* |
|  | Free Text | Text | *35* | *NM* | *Optional: Some countries like CANADA are using this field to store comments in SAP.* |
|  | Rejection reasons | Text | *2* | *NM* | *Optional* |
|  | Storage Location | Text | *4* | *NM* | *Will be used for France.* |

##### Create Order Response (Generated by backend)

###### Response Header

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Field | Type | Length | Description |
|  | Document Number **(Key)** | Text | 10 | Reference of the document number created (Credit memo request, or return for instance) |
|  | Reference Document Number | Text | 10 | Original document number ( in case of a credit memo request for instance, it will include the reference to the original invoice). |
|  | Delivery block | Text | 2 | If any delivery block |
|  | Delivery block label | Text | 20 | Label based on language |
|  | Billing block | Text | 2 | If any billing |
|  | Billing block label | Text | 20 | Label based on language |
|  | Total Net Amount | Number | 15 | Decimal and (-) sign. 2 Decimal |
|  | Total Tax amount | Number | 15 | Decimal and (-) sign. 2 Decimal |
|  | Total Amount to be Paid | Number | 15 | Decimal and (-) sign. 2 Decimal  It’s the sum of all the amounts to be paid by customer including transport fees, discount… |
|  | Total discount amount | Number | 15 | 2 Decimal, |
|  | Freight Charges | Number | 15 | 2 Decimal, Freight charges |
|  | Currency | Text | 5 | ISO code 3 characters |
|  | Language | Text | 2 | Language code as defined in the table of this document. |
|  | Case ID | Text | 10 | Case ID transmitted by CCM within the request. |

###### Response Item lines

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Field** | **Type** | **Description** |
|  | Document number (Key) | Text | Reference of the document number created |
|  | Item number (Key) | Text | SAP internal number |
|  | Product SAP code | Text | SAP product code GMID for france |
|  | Quantity | Number | Quantity |
|  | Unit | Text | Unit |
|  | Item Net Amount | Number | Decimal and (-) sign. 2 Decimal |
|  | Item Tax amount | Number | Decimal and (-) sign. 2 Decimal |
|  | Item Tax percentage | Number | Decimal and (-) sign. 2 Decimal |
|  | Item Discount amount | Number | Decimal and (-) sign. 2 Decimal  The discount amount |
|  | Item Discount percentage | Number | 2 Decimal, discount % |
|  | Currency | Text | ISO code 3 characters |

###### Response Message

The message block is optional, will contain error message returned from backend. If the error is related to an item level, then item number will be described in the Message Label.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Field | Type | Length | Description |
|  | Message Type | Text | 1 | 4 values are possible [Error, Success, Information, Warning] |
|  | Message class | Text | 20 | Optional |
|  | Message Id | Text | 3 | Optional |
|  | Message Label | Text | 220 | Optional |

###### XSD/XML

Request:

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Request>  <!-- Case details -->  <CaseID>C-FR17-54</CaseID>  <!-- Customer details -->  <SourceSystem>CEP</SourceSystem>  <CustomerSoldToSAPCode>1098098</CustomerSAPCode>  <Language>FR</Language>  <CountryCode>FR</CountryCode>  <CustomerShipToSAPCode></CustomerShipToSAPCode>  <CustomerBillToSAPCode></CustomerBillToSAPCode>  <CustomerPayerSAPCode></ CustomerPayerSAPCode >  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision></SalesDivision>  <DistributionChannel>HP</DistributionChannel>  </SalesArea>  <!-- Request Header details -->  <InvoiceRefNumber></InvoiceRefNumber>  <PurchaseOrderNumber></PurchaseOrderNumber>  <RequestType>YCMR</RequestType>  <RequestReason>ZEC</RequestReason>  <PriceDate>20171212</PriceDate>  <TaxeDate>20171212</TaxeDate>  <FreeText></FreeText>  <!-- Request Items-->  <Items>  <Item>  <InvoiceRefItem>1</InvoiceRefItem>  <ProductSAPCode>87655</ProductSAPCode>  </Item>  </Items>  <!-- Operator details -->  <Operator>  <CreatedBy>FR898769</CreatedBy>  <CreatedByName>Aurelie M</CreatedByName>  <SalesAreas>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision></SalesDivision>  <DistributionChannel>HP</DistributionChannel>  </SalesArea>  </SalesAreas>  </Operator>  <CountryCode>FR</CountryCode>  <!-- Customer details -->  <SourceSystem>CEP</SourceSystem>  <CustomerSoldToSAPCode>1098098</CustomerSAPCode>  <CustomerShipToSAPCode></CustomerShipToSAPCode>  <CustomerBillToSAPCode></CustomerBillToSAPCode>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision></SalesDivision>  <DistributionChannel>HP</DistributionChannel>  </SalesArea>  <!-- Request Header details -->  <InvoiceRefNumber></InvoiceRefNumber>  <PurchaseOrderNumber></PurchaseOrderNumber>  <RequestType>YCMR</RequestType>  <RequestReason>ZEC</RequestReason>  <PriceDate>20171212</PriceDate>  <TaxeDate>20171212</TaxeDate>  <FreeText></FreeText>  <!-- Request Items-->  <Items>  <Item>  <InvoiceRefItem>1</InvoiceRefItem>  <ProductSAPCode>87655</ProductSAPCode>  <Quantity>10</Quantity>  <Unit>BOX</Unit>  <FreeText></FreeText>  <RejectionReason></RejectionReason>  <StorageLocation></StorageLocation>  </Item>  <Item>  <InvoiceRefItem>1</InvoiceRefItem>  <ProductSAPCode>87677</ProductSAPCode>  <Quantity>5</Quantity>  <Unit>BOX</Unit>  <FreeText></FreeText>  <RejectionReason></RejectionReason>  <StorageLocation></StorageLocation>  </Item>  </Items>  <!-- Operator details -->  <Operator>  <CreatedBy>FR898769</CreatedBy>  <CreatedByName>Aurelie M</CreatedByName>  <SalesAreas>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision></SalesDivision>  <DistributionChannel>HP</DistributionChannel>  </SalesArea>  </SalesAreas>  </Operator>  </Request> |

Response:

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Response>  <DocumentNumber></ DocumentNumber >  <ReferenceDocumentNumber>12349876</ ReferenceDocumentNumber >  <DeliveryBlock>0</DeliveryBlock>  <DeliveryBlockLabel></DeliveryBlockLabel>  <BillingBlock></BillingBlock>  <TotalNetAmount></TotalNetAmount>  <TotalTaxAmount><TotalTaxAmount>  <TotalAmountToBePaid></TotalAmountToBePaid>  <TotalDiscountAmount></TotalDiscountAmount>  <FreightCharges></FreightCharges>  <Currency></Currency>  <Language>FR</Language>  <CaseID></CaseID>  <Items>  <Item>  <DocumentNumber>12349876</DocumentNumber>  <ItemNumber>1</ItemNumber>  <ProductSAPCode>8768768</ProductSAPCode>  <Quantity>10</Quantity>  <Unit>BOX</Unit>  <NetAmount></NetAmount>  <TaxAmount></TaxAmount>  <TaxPercentage></TaxPercentage>  <ItemDiscountAmount></ItemDiscountAmount>  <ItemDiscountPercentage></ItemDiscountPercentage>  <Currency>EUR</Currency>  </Item>  <Items>  <Message>  <Type></Type>  <Class></Class>  <Id></Id>  <Label></Label>  </Message>  </Response> |

#### [Connector] Update Order

*Connector means: Request from CCM to backend*

As part of CCM processes, user needs to trigger the blocking, unblocking or refusal of an Order

The scenarios covered by this connector are the following:

* Reject/Unblock credit Memo
* Reject/Unblock return order
* Reject/Unblock new sales order

|  |  |  |  |
| --- | --- | --- | --- |
| ***Connector name*** | ***type*** | ***protocol*** | ***WSDL*** |
| UpdateOrder | Synchronous | SOAP/XML |  |

##### Update Request (Generated by CCM)

###### Update Order Header

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Field** | **Type** | **Length** | **Description** |
|  | Request number **(Key)** |  | 10 | Request number returned by backend during creation. |
|  | Document Reference | Text | 10 | Will reference the original document reference number (Returned by backend when request was created). |
|  | Order Reason | Text | 3 | Order reason code |
|  | Rejection reason code | Text | 2 | Rejection reason code. |
|  | Billing Block | Text | 2 | To unblock a request order, this code should be empty. By default backend if this value is empty will unblock the order. |
|  | Delivery Block | Text | 2 | To unblock a request order, this code should be empty. By default backend if this value is empty will unblock the order. |
|  | Language | Text | 2 | ISO code (2 characters), It’s the language of the operator executing the request in CCM. |
|  | Source system | Text | 10 | Source system driven from customer master data |
|  | Country Code | Text | 3 | Country code as defined in table in CCM (See paragraph above) |
|  | Case ID | Text |  | Case ID generated by CCM |
|  | Created By | Text | 12 | Pega CCM Operator id who triggered the order creation in Pega CCM |
|  | Created By Name | Text | 40 + 40 | First name and last name of the operator who triggered the order in Pega CCM. |
|  | Sales Areas | LIST | 4/2/2 | Will contain the list of sales areas the operator belongs to, It will help backend filter the results if needed based on the sales area. This list will contain the following fields.   * Sales Org * Sales Div * Distribution channel |

###### Update Order Items lines

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Field** | **Type** | **Length** | **Description** |
|  | Request number **(Key)** |  | 10 | Request number returned by backend during creation. |
|  | Document reference **(Key)** | Text | 10 | Required : Document reference in SAP |
|  | Item Number **(Key)** | Text | 6 | Required: Item number in SAP |
|  | Rejection reason code | Text | 2 | Required if we have to reject the some item lines. |

##### Update Order Response

###### Response Header

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | **Field** | **Type** | **Length** | **Description** |
| 1 | Document reference **(Key)** | Text | 10 | Document reference in SAP |

###### Response Item lines

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Field | Type | Length | Description |
|  | Document reference **(Key)** | text | 10 | Document reference in SAP, Same the one referenced in header |
|  | Item number **(Key)** | Text | 6 | Item number in SAP |
|  | SAP Product code | Text | 18 | SAP product code GMID for france |
|  | Quantity | Number | 13 | Quantity |
|  | Unit | Text | 3 | Unit |
|  | Net Amount | Number | 15 | Decimal and (-) sign. 2 Decimal |
|  | Tax amount | Number | 15 | Decimal and (-) sign. 2 Decimal |
|  | Item Tax percentage | Number | 11 | Decimal and (-) sign. 2 Decimal |
|  | Currency | Text | 5 | ISO code 3 characters |
|  | Order Reason | Text | 3 | Order reason |

###### Response Message

The message block is optional, will contain error message returned from backend. If the error is related to an item level, then item number will be described in the Message Label.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Field | Type | Length | Description |
|  | Message Type | Text | 1 | 4 values are possible [Error, Success, Information, Warning] |
|  | Message class | Text | 20 | Optional |
|  | Message Id | Text | 3 | Optional |
|  | Message Label | Text | 220 | Optional |

Error Message:

For any error message returned by backend, CCM will have to display the error Id, Type and Label to end user.

###### XSD/XML

Request:

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Request>  <!-- Case details -->  <CaseID>C-FR17-54</CaseID>  <!-- Customer details -->  <SourceSystem>CEP</SourceSystem>  <CustomerSoldToSAPCode>1098098</CustomerSAPCode>  <Language>FR</Language>  <CountryCode>FR</CountryCode>  <!-- Initial request details -->  <RequestNumber>1985555</RequestNumber>  <DocumentReference>987989</ DocumentReference >  <OrderReason></OrderReason>  <RejectionReason></RejectionReason>  <BillingBlock></BillingBlock>  <DeliveryBlock></DeliveryBlock>  <!-- Operator details -->  <Operator>  <CreatedBy>FR898769</CreatedBy>  <CreatedByName>Aurelie M</CreatedByName>  <SalesAreas>  <SalesArea>  <SalesOrganization>SWF1</SalesOrganization>  <SalesDivision></SalesDivision>  <DistributionChannel>HP</DistributionChannel>  </SalesArea>  </SalesAreas>  </Operator>  <Items>  <Item>  <RequestNumber>1985555</RequestNumber>  <DocumentReference>987989</DocumentReference>  <ItemNumber>1</ItemNumber>  <RejectionReason></RejectionReason>  </Item>  </Items>  </Request> |

Response:

|  |
| --- |
| <?xml version="1.0" encoding="ISO-8859-15"?>  <Response>  <DocumentReference>987989</DocumentReference>  <Items>  <Item>  <DocumentReference>987989</DocumentReference>  <ItemNumber>1</ItemNumber>  <ProductSAPCode>3453453</ProductSAPCode>  <Quantity>10</Quantity>  <Unit>BOX</Unit>  <NetAmount>98.67</NetAmount>  <TaxAmount>20</TaxAmount>  <TaxPercentage>0.2</TaxPercentage>  <Currency>EUR</Currency>  <OrderReason></OrderReason>  </Item>  <Message>  <Type></Type>  <Class></Class>  <Id></Id>  <Label></Label>  </Message>  </Response> |

### [Service] Get Status Update (Backend to CCM)

*Note: A service is exposed from Pega CCM, Backend will have to generate the request and Pega CCM will generate the response back.*

The Get Status Update service will cover the 3 services defined below. The same request and response structure will be used to cover the 3.

#### [Service] Get Good receipt status

This service allows backend to update Pega CCM about the good receipts of goods by the warehouse.

This service is used in the following business context:

* Get Good receipt details from backend (Return orders).

#### [Service] Get billing status

Get billing status

The service is exposed from CCM; it allows backend to update CCM about the invoice creation in backend (Billing to customer).

This service is used in the following business context:

* Get Billing confirmation from backend (Credit memo orders or new sales order)

#### [Service] Get delivery status

Get delivery status

The service is exposed from CCM; it allows backend to notify CCM about the delivery of products to customer.

This service is used in the following business context:

* Get Delivery to customer confirmation from backend (Replacement of products)

|  |  |  |  |
| --- | --- | --- | --- |
| ***Service name*** | ***type*** | ***protocol*** | ***Wsdl URL*** |
| * GetStatusUpdate | * Synchronous | * SOAP/XML |  |

#### Request

##### Request Header (Backend > CCM)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Field** | **Type** | **Length** | **Description** |
|  | Case ID | Text | 10 | Backend will save the CCM Case ID for every request coming from CCM. This case ID will be returned to CCM each time a response or request is sent back. |
|  | Source System | Text | 10 | Source System from which update is sent. |
|  | Invoice Number | Text | 10 | Invoice document number created by backend as part of the billing process. |
|  | Delivery Number | Text | 10 | The delivery number |
|  | Original Invoice Number | Text | 10 | A reference to the original Invoice number. |
|  | Reference Order |  |  | Sales document created from Pega CCM. |
|  | Order Reason | Text | 3 | Order reason |
|  | Order type | Text | 4 | Order type |
|  | Created By | Text | 12 | Operator ID that has created initial order. |
|  | Billing Block | Text | 2 | Billing block |
|  | Total Net Amount | Number | 15 | Decimal and (-) sign. 2 Decimal |
|  | Total Tax amount | Number | 15 | Decimal and (-) sign. 2 Decimal |
|  | Total Amount to be Paid | Number | 15 | Decimal and (-) sign. 2 Decimal  It’s the sum of all the amounts to be paid by customer including transport fees, discount… |
|  | Total discount amount | Number | 15 | 2 Decimal, |
|  | Freight Charges | Number | 15 | 2 Decimal, Freight charges |
|  | Currency | Text | 5 | ISO code 3 characters |
|  | Language | Text | 2 | Language code as defined in the table of this document. |

##### Request Items

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Field | Type | Length | Description |
|  | Document Number | Text | 10 | The document number that was created in backend. |
|  | Item Line | Text | *6* | Item line number. |
|  | Delivery Number | Text | 10 | Required in case of a return process or replacement (Delivery status) |
|  | Delivery item number | Text | 6 | Required if the Delivery number is sent. |
|  | SAP Product code | text | 18 | GMID for France |
|  | Product Quantity | Number | 13 | Product Quantity |
|  | Product Unit | Text | 3 | Unit of Quantity |
|  | Item Status |  | 20 | In case of a return process:  For France:  This Status could have the following values:   * [TO BE DEFINED: STOCK MVMT] |
|  | Rejection reason Code | Text | 2 | Rejection reason code |
|  | Rejection reason Label | Text | 20 | Rejection reason label |
|  | Item Net Amount | Number | Decimal and (-) sign. 2 Decimal | Item Net Amount |
|  | Item Tax amount | Number | Decimal and (-) sign. 2 Decimal | Item Tax amount |
|  | Item Tax percentage | Number | Decimal and (-) sign. 2 Decimal | Item Tax percentage |
|  | Item Discount amount | Number | Decimal and (-) sign. 2 Decimal  The discount amount | Item Discount amount |
|  | Item Discount percentage | Number | 2 Decimal, discount % | Item Discount percentage |
|  | Currency | Text | ISO code 3 characters | Currency |

#### Response

##### Response Header

This response is sent by Pega CCM , backend is not expected to execute any action following this response.

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Field** | **Type** | **Description** |
|  | Acknowledgment | Boolean | CCM should return a Boolean saying that request was processed.  0: FALSE, Error message within the message tags.  1: TRUE, processed successfully. |

#### XSD/XML

Request sent by backend:

|  |
| --- |
| <? xml version="1.0" encoding="ISO-8859-15"?>  <Request>  <CaseID>C-FR17-98</CaseID>  <RequestNumber>123123123</RequestNumber>  <OrderReason></OrderReason>  <OrderType></OrderType>  <DeliveryNumber></DeliveryNumber>  <InvoiceNumber></InvoiceNumber>  <BillingBlock></BillingBlock>  <Operator>  <CreatedBy>FR898769</CreatedBy>  </Operator>  <Items>  <Item>  <RequestNumber></RequestNumber>  <RequestItemNumber>1</RequestItemNumber>  <DeliverItem>1</DeliverItem>  <ProductSAPCode>98798</ProductSAPCode>  <Quantity>10</Quantity>  <Unit>BOX</Unit>  <ItemStatus>BLOCKED</ItemStatus>  <RejectionReason></RejectionReason>  <RejectionReasonLabel></RejectionReasonLabel>  </Item>  </Items>  </Request> |

Response returned by Pega CCM:

|  |
| --- |
| <Response>  <Acknowledgment>0</Acknowledgment>  <Message>  <Type>ERROR</Type>  <Class></Class>  <Id>ERROR\_1</Id>  <Label>Request Number not recognized , Case not found</Label>  </Message>  </Response> |

## Data Migration System Specification (DM)

*Not applicable*

## Interoperability (I)

*Not applicable*

## VPN consideration

JIRA is opened to follow up the subject: [SCCORE-615](https://shiftproject.atlassian.net/browse/SCCORE-615)

## Web Browser support

CCM is built on Pega 7 solution, The Pega 7 Platform was designed to leverage and be compatible with IE11 and HTML5 technology. Internet explorer 11 is supported by Pega, Pega has announced that support for Safari, Chrome, and Firefox is limited. Therefore Internet explorer 11 will be taken as the reference browser for testing all CCM features. End user should be advised to use IE11 as the main browser for CCM.

## Open Items

|  |  |  |  |
| --- | --- | --- | --- |
| # | Item JIRA Number | Topic | Status |
|  | 1. [SCCORE-682](https://shiftproject.atlassian.net/browse/SCCORE-682) | Tracking Number | CLOSED |
|  | 1. [SCCORE-1046 - Interface: Item Status for Service Return](https://shiftproject.atlassian.net/browse/SCCORE-1046) has been successfully created. | Item Status for the Return Process. | OPEN |
|  | [JIRA: [SCCORE-1035 - SPEC: Welcome Email when new Operator is having access to Pega CCM](https://shiftproject.atlassian.net/browse/SCCORE-1035) – | Email to business operators when granted access to Pega CCM. | OPEN |
|  | Issue [SCCORE-1039 - SPEC: Global Unvoice Status](https://shiftproject.atlassian.net/browse/SCCORE-1039) has been successfully created. | Global Invoice Status | OPEN |
|  | Issue [SCCORE-1052 - SPEC: Functional Tech : Order Taken By](https://shiftproject.atlassian.net/browse/SCCORE-1052) has been successfully created. | Order taken By | OPEN |
|  | SCCORE-722 | Creating orders at header level. We have defined in the create case that operators can create a case based on a set of Item lines So We shouldn’t create the claim at the header level!! | CLOSED |
|  | SCCORE-817 | [- Interfaces: Initial Load of Master data](https://shiftproject.atlassian.net/browse/SCCORE-817) and Delta changes | CLOSED |
|  | 1. [SCCORE-818](https://shiftproject.atlassian.net/browse/SCCORE-818) | Interfaces: SHIFT Language | CLOSED |
|  | [SCCORE-669](https://shiftproject.atlassian.net/browse/SCCORE-669) | Price of a material; Catalogue Price | CLOSED |
|  | [SCCORE-819](https://shiftproject.atlassian.net/browse/SCCORE-819) | How to identify the replacement orders. | CLOSED |
|  | 1. [SCCORE-1036](https://shiftproject.atlassian.net/browse/SCCORE-1036) | Externat destruction order type in CEP | OPEN |
|  | 1. SCCORE-957 | Apply Discount | CLOSED |

1. \* *Signatures above indicate approvers agree with the content of the document and ensure it will be applicable within their domain of expertise.* [↑](#footnote-ref-2)