Business Use Case and Dictionary

1. Business Use Case

Company X is a global healthcare company that provides medical devices and software solutions for treating cancer and brain disorders. To effectively manage and optimize their sales pipeline, revenue streams, and client relationships, Company X uses a comprehensive data structure stored in multiple tables, including account, opportunity, opportunitylineitem, product, project, quote, quoteline, and servicecontract.

2. Dictionary

1. Account:

a. ***Definition***: The account table contains the core details of Company X's customers. This table is crucial for understanding the type of client and their geographical location, which aids in segmentation, targeted sales, and personalized service.

b. Columns:

i. **id**: Unique identifier for the account (customer).
ii. **name**: Name of the account (usually the company name).
iii. **type**: Type of the account (Customer, Distributor).
iv. **country**: Country where the account is located.
v. **currency_code**: The currency used by the account.
vi. **created_date**: Date the account was created.
vii. **active**: Status of the account (whether it is active or not).
viii. **region**: Geographic region of the account.
ix. **customer_type**: Further segmentation of the customer (e.g., Local/Community Hospital, Regional/Top Clinical Center).
x. **continent**: Continent of the account.
xi. **ingestion_date**: Date when the record was ingested into the system.

2. Opportunity:

a. ***Definition***: The opportunity table tracks the sales prospects related to each account. Each opportunity represents a potential revenue source, whether through sales or long-term service agreements

b. Columns:

i. **id**: Unique identifier for the opportunity.
ii. **name**: Name of the opportunity.
iii. **account_id**: Foreign key linking to the account table.
iv. **close_date**: The expected closing date of the opportunity
v. **stage_name**: The current stage of the opportunity (e.g., Closed Won, Closed Abandoned).
vi. **amount**: The total monetary value of the opportunity.
vii. **expected_revenue**: The projected revenue from the opportunity.
viii. **currency_code**: The currency code for the opportunity.
ix. **created_date**: Date the opportunity was created.
x. **fiscal_quarter**: Fiscal quarter for the opportunity.
xi. **fiscal_year**: Fiscal year for the opportunity.
xii. **product_category**: The product category associated with the opportunity.
xiii. **service_maintenance_contract**: Indicates if a service or maintenance contract is attached to the opportunity.

xiv. **total_sales_price**: Total sales price for the opportunity.
xv. **total_discount**: Total discount applied to the opportunity.
xvi. **is_parent**: Whether the opportunity is a parent opportunity in a hierarchy.
xvii. **opportunity_cost**: The cost associated with the opportunity.
xviii. **total_quote_value**: The total value of quotes associated with the opportunity.
xix. **implementation_project**: Links to the related implementation project, if applicable.
xx. **po_number**: Purchase order number associated with the opportunity.
xxi. **primary_quote**: The primary quote linked to the opportunity.
xxii. **ingestion_date**: Date the record was ingested into the database.
xxiii. **file_date**: The date of the file containing the data.

3. **OpportunityLineItem**
   a. ***Definition***: The opportunitylineitem table captures the individual line items (products or services) that make up an opportunity, offering a more detailed view of what is being sold.
   b. Columns:
      i. **id**: Unique identifier for the line item.
      ii. **opportunity_id**: Foreign key linking to the opportunity table.
      iii. **product_id**: Foreign key linking to the product table.
      iv. **created_date**: The date the line item was created.
      v. **product_code**: The code associated with the product.
      vi. **name**: The name or description of the line item.
      vii. **quantity**: The number of units of the product/service.
      viii. **total_price**: The total price of the line item.
      ix. **unit_price**: The price per unit.
      x. **list_price**: The list price of the product.
      xi. **description**: A description of the line item.
      xii. **margin**: Profit margin for the line item.
      xiii. **list_price_c**: Custom list price field.
      xiv. **opportunity_record_type_name**: The type of record associated with the opportunity.
      xv. **discount_amount**: Any discounts applied to the line item.
      xvi. **ingestion_date**: The date the record was ingested into the system.

4. **Product**
   a. ***Definition***: The product table contains the details of each product that Company X sells, ranging from medical devices to software solutions.
   b. ***Columns***:
      i. **id**: Unique identifier for the product.
      ii. **name**: The name of the product.
      iii. **product_code**: The code used to identify the product.
      iv. **active**: Whether the product is active or not.
      v. **created_date**: The date the product was created.
      vi. **family**: Product family (e.g., Brachy, Linac).
      vii. **currency**: The currency used for pricing the product.
      viii. **business_area_code**: Code representing the business area associated with the product.
      ix. **business_responsible**: Division responsible for the product.
      x. **product_weight**: Weight of the product.

xi. **standard_cost**: The standard cost to produce the product.
xii. **description**: Product description.
xiii. **status**: Status of the product (e.g., Released).
xiv. **product_group**: Group classification for the product.
xv. **business_area_description**: Description of the business area.
xvi. **ingestion_date**: The date the record was ingested.
xvii. **file_date**: The date of the file containing the data.

5. **Project**
   a. ***Definition***: The project table tracks the various projects associated with different accounts and opportunities. Each project could represent an implementation, upgrade, or any service Company X provides post-sales.
   b. ***Columns***:
      i. **id**: Unique identifier for the project.
      ii. **name**: The name of the project.
      iii. **account_id**: Foreign key linking to the account.
      iv. **currency_code**: Currency used for the project.
      v. **created_date**: The date the project was created.
      vi. **project_status**: The current status of the project (e.g., Completed, Hold).
      vii. **completion_date**: The date the project was completed.
      viii. **country**: The country where the project is taking place.
      ix. **business_region**: The business region for the project.
      x. **project_type**: The type of project (e.g., Company X Bundle, Stand Alone).
      xi. **project_account_region**: The account region related to the project.
      xii. **project_Company X_bu**: The Company X business unit responsible for the project.
      xiii. **project_Company X_territory**: The Company X territory for the project.
      xiv. **project_legal_country**: The legal country related to the project.
      xv. **new_account_region**: The new account region associated with the project.
      xvi. **project_manager_name**: The name of the project manager.
      xvii. **ingestion_date**: The date the record was ingested.

6. **Quote**
   a. ***Definition***: The quote table records the quotes provided to customers. It captures the terms, amounts, and timelines agreed upon with the customer.
   b. Columns:
      i. **id**: Unique identifier for the quote.
      ii. **name**: Name of the quote.
      iii. **created_date**: Date the quote was created.
      iv. **account_id**: Foreign key linking to the account table.
      v. **contracting_method**: The method of contracting (e.g., Subscription).
      vi. **customer_discount**: Any discount provided to the customer.
      vii. **days_quote_open**: The number of days the quote has been open.
      viii. **end_date**: The end date for the quote.
      ix. **expiration_date**: The expiration date for the quote.
      x. **opportunity_id**: Foreign key linking to the opportunity.
      xi. **payment_terms**: Payment terms for the quote (e.g., Net 30).
      xii. **shipping_city**: The city where the products/services will be shipped.
      xiii. **shipping_country**: The country for shipping.
      xiv. **shipping_postal_code**: Postal code for shipping.
      xv. **shipping_state**: State for shipping.

xvi. **start_date**: Start date for the quote.
xvii. **status**: Status of the quote (e.g., Draft, Approved).
xviii. **subscription_term**: The term length of the subscription (in months).
xix. **customer_amount**: The total amount to be paid by the customer.
xx. **line_item_count**: The number of line items in the quote.
xxi. **list_amount**: The total list price for the quote.
xxii. **net_amount**: The net amount after discounts.
xxiii. **regular_amount**: The regular amount (before adjustments).
xxiv. **approval_status**: Whether the quote is approved.
xxv. **additional_discount**: Additional discounts applied.
xxvi. **annual_recurring_revenue**: Annual recurring revenue from the quote.
xxvii. **conga_currency_locale**: Currency locale for the quote.
xxviii. **currency_conversion_rate**: Currency conversion rate used.
xxix. **first_year_value**: The value for the first year.
xxx. **mosaiq_package_name_for_output**: Name of the MOSAIQ package included in the quote.
xxxi. **ingestion_date**: The date the record was ingested.

7. **QuoteLine**
   a. ***Definition***: The quoteline table captures individual products or services within a quote. Each line item contributes to the overall value of the quote.
   b. ***Columns***:
      i. **id**: Unique identifier for the quote line.
      ii. **name**: Name or number of the quote line.
      iii. **created_date**: The date the quote line was created.
      iv. **quote**: Foreign key linking to the quote table.
      v. **charge_type**: Type of charge (e.g., Recurring, One-Time).
      vi. **component_total_value**: The total value of the component.
      vii. **existing_MOSAIQ_customer**: Whether the customer is an existing MOSAIQ customer.
      viii. **new_MOSAIQ_customer**: Whether the customer is new to MOSAIQ.
      ix. **customer_profile**: Profile of the customer (e.g., Business type).

8. ServiceContract
   a. ***Definition***: The servicecontract table manages details related to service agreements. This includes maintenance and support agreements that ensure ongoing relationships with the customer.
   b. ***Columns***:
      i. **id**: Unique identifier for the service contract.
      ii. **name**: Name or number assigned to the service contract.
      iii. **created_date**: The date the service contract was created.
      iv. **opportunity_id**: Foreign key linking to the associated opportunity.
      v. **active**: Indicates whether the contract is currently active.
      vi. **contract_price**: The total price of the contract.
      vii. **discounted_price**: The discounted price for the contract.
      viii. **end_date**: The end date of the service contract.
      ix. **start_date**: The start date of the service contract.
      x. **week_to_renewal**: The number of weeks until the contract renewal date.
      xi. **contract_type**: The type of contract (e.g., Annual, Multi-Year, Perpetual).
      xii. **status**: Status of the contract (e.g., Valid, Expired, Canceled).
      xiii. **invoice_date_start**: The date from which invoices are issued.

xiv. **billing_frequency**: The frequency of billing for the contract (e.g., Monthly, Annually).
xv. **total_covered_products**: The number of products covered under the contract.
xvi. **agreement_type**: The type of agreement (e.g., Normal Agreement, Extended Warranty).
xvii. **division**: The division or business unit responsible for the contract.
xviii. **invoice_method**: The method of invoicing (e.g., In Advance, In Arrears).
xix. **ingestion_date**: The date when the record was ingested into the database.
xx. **file_date**: The date of the file containing the data.