Cien.ai API Documentation

V1.1.25 - 09.13.2023

Cien's API DOCUMENTATION CONTENTS

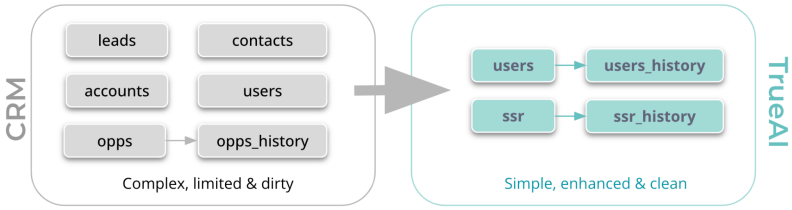
CIEN'S API

Overview

What is the Cien.ai API?

The Cien API allows developers to access the underlying data from Cien's TrueAI platform, built to enable sales and marketing technology applications and analytics in completely new ways.

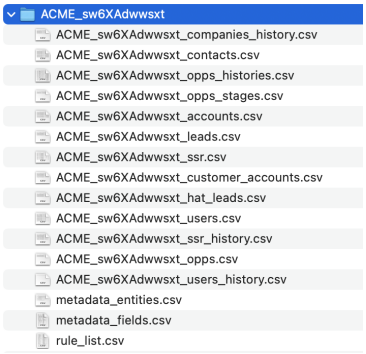
The TrueAI Platform



Cien's TrueAI platform enhances CRM data and provides transparency on the underpinnings and accuracy of its calculations. The API is able to provide insights regardless of your company's CRM data quality. Duplicate data is flagged. Natural Language Processing (NLP) models deal with inconsistent data. Incomplete data is enhanced from internal and external sources. We measure the accuracy of a customer's CRM data and provide enhancements and annotations for superior analytics.

API Specification

Upon proper initialization of the API you will get cloud access to the data in the form of a zip file containing csv files with the below entities. These files can then be manlluy or automatically imported as per your requirements; into data warehouses, and/or to BI tools for integration into your analytic reports. Scripts for SQL Server, PostgresSQL, Snowflake & Spark are included.



Upon request, there is a reference implementation on how Cien's API can be used in the form of Cien's TrueAI GTM Suite created in Power BI for . This can help you get started with your advanced GTM analytics project.

Support

If you have any questions, please reach out to our technical developer support: api@cien.ai.

API EXAMPLES

To get you started and familiarize yourself with the Cien API, and the power of the TrueAI platform, we have created the following API examples written in PostgresSQL. These examples cover different aspects of the platform such as data cleaning (ADE), rep performance (CI) and deal analysis (DI). By running through the examples on your dataset you will both get a quick understanding of the company's GTM performance and also familiarize yourself with how to use the very powerful derived `ssr_history` and `users_history` entities. Almost all common GTM questions can be answered with those. And in many cases you can simply change a grouping or condition to answer the specific question you find most pressing right now.

As always, we are eager for your feedback. If you have suggestions for other examples or need help changing a question, feel free to contact our API support team: api@cien.ai.

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Automatic Data Enhancement (ADE)

Transparency on the Data Cleanup Process

Before you start using the new derived entities it makes sense to understand the quality of the underlying data, and how it has been enhanced by the TrueAI platform. The following examples illustrate some of the ways in how this can be done.

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ADE #1: Lead Duplication (V.1.2)

Purpose of Analysis

Duplicate leads cause multiple challenges; for example, reps are not sure if they have properly followed up on an account, and analysis of lead conversion gets very complicated.

Common Challenges and How to Accomplish with the Cien API

To determine duplicate leads, just looking for the exact same information in multiple records will not usually find many dupes. Some duplicate records may have different email addresses, and/or alternate spellings of names (Mike vs. Michael etc.). The TrueAI platform uses a "fuzzy" match that generates a duplicate confidence, and only marks the records that are above that confidence threshold as duplicates.

Multiple leads and accounts can often make prospecting analysis hard. To solve this problem, the TrueAI platform has created a derived entity called `hat_leads` (The name comes from the fact that a "logical lead" can wear different "hats"; as an account, one lead or multiple leads). If you want to analyze lead-related data, we recommend that you use that entity. In this case we are using the lead entity to illustrate the issue in your database.

Example SQL

```
SELECT
u.trueai_group, u.trueai_user_role_dept, -- group fields
Count(*)  as lead_count, -- total leads
Count(trueai_lead_dupe_id) as dupe_records, -- total duplicated records
Count(DISTINCT trueai_lead_dupe_id) as unique_dupe_records, -- total duplicated records
Count(trueai_lead_dupe_id) / CAST(Count(*) as float) as dupe_ratio,
Count(CASE WHEN trueai_is_master = 'true' THEN trueai_is_master END ) as master_records, -- the master
record
Count(trueai_company_dupe_id) as company_dupe_records, -- also check how many leads belong to the same
company
Count(trueai_company_dupe_id) / CAST(Count(*) as float) as company_dupe_ratio -- calculate that ratio
FROM leads AS l -- use leads
LEFT JOIN users AS u -- left join to users to get user info
ON l.trueai_creator_id = u._sys_doc_id -- use creator id to determine who created the dupe record
GROUP BY u.trueai_group, trueai_user_role_dept -- group fields (group & dept)
ORDER BY dupe_records DESC; -- sort by the most dupes
```

Sample Result

In this case there is not a lot of duplication of actual leads, but many leads belong to the same company, and would be consolidated in the `hat_leads` entity.

trueai_group	trueai_user_role_level	lead_count	dupe_records	unique_dupe_records	dupe_ratio	master_records	company_dupe_records	company_dupe_ratio
ND	MKT	35,657	12	9	0.03%	35648	3306	9%
ND	ND	17	0	0	0.00%	17	3	18%
Enterprise	SALES	7	0	0	0.00%	7	2	29%
SMB	SALES	14	0	0	0.00%	14	4	29%
ND	SALES	736	0	0	0.00%	736	93	13%

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ADE #2: Lead & Account Completeness

Purpose of Analysis

Incomplete data is one of the most common data quality problems, which causes issues both for reps who need to spend time looking for contact info, and for any analysis that relies on complete data such as lead source or location.

Common Challenges and How to Accomplish with the Cien API

You cannot address incomplete data without knowing what's missing. TheTrueAI platform makes this easy since the base CRM entities (`leads`, `accounts`, `contacts` & `opps`) has a `crm_completeness` field for each record, scoring the record between 0 (no meaningful data) to 1 (all needed data is populated). The score is broken down into subcomponents (contact, geo, location & marketing) to see exactly where problems are located. The platform then uses internal and external lookups to populate the corresponding TrueAI field, and calculates the improved score.

Example SQL

```
SELECT
AE.entity, -- get the entity since it is a union
u.trueai_user_role_dept as creator_dept, -- which dept created the record
Count(*)  as record_count, -- count
AVG(AE.crm_complt) AS avg_crm_complt_score, -- the overall score of the raw CRM data
AVG(AE.crm_complt_contact) AS avg_crm_complt_score_contact, -- the contact info only score
AVG(AE.crm_complt_contact_method) AS avg_crm_complt_score_contact_method, -- how much of email, phone
etc, is populated
AVG(AE.crm_complt_geo) AS avg_crm_complt_score_geo, -- the location info score
AVG(AE.crm_complt_marketing)  AS avg_crm_completness_score_marketing, -- the marketing info like lead
source, industry etc
AVG(AE.trueai_complt)  AS avg_trueai_completeness_score -- the enhanced completeness score
 FROM
 -- create union of multiple tables (could also add opps & contacts)
  (SELECT 'leads' as entity, crm_createdon, trueai_creator_id, crm_complt, crm_complt_contact,
crm_complt_contact_method,  crm_complt_geo,crm_complt_marketing,trueai_complt FROM leads AS L
 UNION
 SELECT 'accounts' as entity, crm_createdon, trueai_creator_id, crm_complt, crm_complt_contact,
crm_complt_contact_method,  crm_complt_geo,crm_complt_marketing,trueai_complt FROM accounts AS A
  )
 as AE
INNER JOIN users AS u -- link in users
ON AE.trueai_creator_id = U._sys_doc_id -- look up the doc id (when available, use the trueai vs. the CRM
field)
WHERE AE.crm_createdon > U._sys_asof -90 -- get in the last 90 days since last data refresh
GROUP BY AE.entity, U.trueai_user_role_dept -- group by entity and dept
ORDER BY 1,2; -- sort entities together
```

Sample Result

In this case the avg. completeness scores are reasonable, with the biggest issue being that a lot of accounts records added by the OPS team are missing emails and phone numbers.

entity	creator_dept	record_count	avg_crm_completeness_score	avg_crm_completeness_score_contact	avg_crm_completeness_score_contact_method	avg_crm_completeness_score_geo	avg_crm_completness_score_marketing	avg_trueai_completeness_score
accounts	MKT	3,384	0.57	1.00	0.74	0.51	0.58	0.63
accounts	ND	53	0.50	1.00	0.43	0.82	0.55	0.56
accounts	OPS	1,124	0.34	1.00	0.06	0.97	0.66	0.34
accounts	OTHER	10	0.73	1.00	0.75	0.90	0.63	0.77

accounts	SALES	537	0.49	1.00	0.44	0.76	0.53	0.54
leads	MKT	1,096	0.38	0.93	0.60	0.25	0.48	0.41

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ADE #3: Consistency & Confidence of Lead Source Consolidation (V.1.2)

Purpose of Analysis

As data is added over multiple years, definitions that originally were consistent and clear tend to become more inconsistent. This makes any analysis very difficult, since it's relying on clean categories.

Common Challenges and How to Accomplish with the Cien API

The traditional way to get data that can be analyzed is to manually clean it up, through search and replace processes. Those processes are time-consuming and error prone, and have to be repeated for each new analysis, since new data is continuously added.

Across multiple entities, there are fields such as `crm_industry`, `crm_leadsource` & `crm_title` etc, that the platform consolidates and standardizes. It uses pre-trained models which have been created to be as broadly applicable as possible. Typically, these models are very good at taking hundreds of different entries and condensing them down to a reasonable number of categories, which can then be used for analysis and AI model features. As this standardization occurs, the model reports a confidence value for each entry. It can be useful to look at those confidence values to see if there were any values that the model struggled with.

Example SQL

```
SELECT -- just get the 10 most common entries
crm_leadsource,  -- what's currently in the db
count(*) as count,  -- count of each
trueai_leadsource, -- the standardized lead source
avg(trueai_leadsource_conf) as trueai_leadsource_conf -- the avg. confidence. If confidence is too low, it
will mark the record as ND.
FROM leads L -- pull from leads, but the same info is in opps, accounts & contacts
WHERE
crm_leadsource is not null -- exclude records that are blank (they may still be populated through lookups,
GROUP BY crm_leadsource, trueai_leadsource -- group fields
Order by count desc -- sort by most common instances in the db
LIMIT 10;
```

Sample Result

The confidence scores are high except for the first one, but, nevertheless, it appears to use the right category. If you encounter a misclassified category, please send a note to api@cien.ai along with the suggested correct category. If the consolidation is not appropriate for your needs (e.g., you need to keep track of different list providers and compare them against each other), you can still use the CRM version of the field, or create a new derived field that uses the standardized TrueAI values except in specific circumstances.

crm_leadsource	count	trueai_leadsource	trueai_leadsource_confidence
Zoom Info	75,999	List Upload	0.80356
Internally Sourced	17,486	Rep Lead Gen	1.00000
Purchased List	4,882	List Upload	1.00000
Website Form	1,273	Website	0.99915

ZoomInfo Prospecting	594	List Upload	0.99972
Paid Social	447	Digital Ads	0.99999
Tradeshow	415	Event/Tradeshow	1.00000
Organic Search	172	SEO	0.99999
Sales Generated	172	Rep Lead Gen	1.00000
Website Referral	151	Website	1.00000

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ADE #4: Sales Process Steps in a Year Summary (V.1.2)

Purpose of Analysis

The key to improve sales performance is to be able to isolate where in the sales process there are inefficiencies. The TrueAI platform makes this very easy.

Common Challenges and How to Accomplish with the Cien API

To understand the steps of a customer journey you typically have to look at `leads, accounts, contacts, opps and opps_history`. The problem is that each company uses these entities slightly differently and the definitions when a specific state started and ended, are often unclear and inconsistent. The TrueAI platform replaces all of that complexity with the `ssr` and `ssr_history` derived entities, which can give you a complete insight into the different steps and their outcomes. As each new step is detected, the TrueAI engine also makes a prediction on the eventual outcome of the step, based on the known attributes of the deal at that point (company information such as location, industry, size etc. and the level of engagement etc, that has occurred until that point). Please note that when that prediction is made, the owner of the current step is not considered (i.e., we don't look at whether the step is assigned to a top performer or a junior rep). Therefore overall, over-, and underperformance of a step compared to peers can help you understand a rep's true performance on a specific sales task; for example in prospecting, which tends to be strongly correlated with the ability to do customer discovery well.

Example SQL

```
SELECT
SH.step_id, -- the logical number of the step
SH.step_name, -- the name of the step
COUNT(SH._sys_doc_id) as steps_completed, -- how many were attempted and completed in the period
COUNT(CASE WHEN SH.step_success= 'true' THEN SH._sys_doc_id END) as steps_succesful, -- how many of those
steps were successful
COUNT(CASE WHEN SH.step_success= 'true' THEN SH._sys_doc_id END) / CAST(COUNT(SH._sys_doc_id) AS Float)
as avg_success_rate, -- calculate how often the step succeeds
AVG(SH.step_success_prob)  as pred_success_rate, -- compare to what TrueAI predicted
AVG(CASE WHEN SH.step_success= 'true' THEN SH.step_length_in_days END) as success_cycle_days, -- how many
days when successful
AVG(CASE WHEN SH.step_success= 'false' THEN SH.step_length_in_days END) as failure_cycle_days, -- how
many days when not successful
SUM(SH.opp_won_amt) as won_amt, -- look at actual revenue for each step
SUM(SH.vi_value_created) as value_created -- look at value created as calculated by the Value
Intelligence (VI) tech
FROM ssr_history AS SH -- use the SSR history to understand the steps the GTM team has completed
INNER JOIN ssr AS S -- use the SSR to link to the actual customer record
ON S._sys_doc_id = SH._sys_ssr_id -- primary key is always _sys_doc_id
WHERE date_part('year', SH._sys_filt_end_date) = date_part('year', SH._sys_asof) -1 -- look at full last
year of data (date_part 'year' in other SQL dialects)
GROUP BY SH.step_id, SH.step_name -- group by the named steps
ORDER BY 1; -- sort by the logical order of the steps
```

Sample Result

There are 6 steps in the standardized sales process. The new logo success rate is slightly higher than the predicted rate, whereas the upselling win rate is slightly lower. The value intelligence value creation values add up to slightly more than total

sale, to account for the repeat value of new accounts. As in almost all organizations, the effort of selling an existing account is lower than in a new account.

step_id	step_name	steps_attempted	steps_succesful	avg_success_rate	pred_success_rate	success_cycle_days	failure_cycle_days	won_amount	value_created
1	Lead Gen	80,960	80,960	100.0%	100.0%	-			$10,855,919
2	Untouched	60,559	13,067	21.6%	22.9%	300	180		$ (4,254,271)
3	Prospecting	14,252	1,156	8.1%	6.8%	240	214		$27,611,706
4	New Logo Selling	2,128	332	15.6%	20.1%	165	266	$69,493,308	$42,949,610
5	Post Sales Support	3,523	3,267	92.7%	77.8%	69	367		$66,606,031
6	Upselling	3,284	2,513	66.1%	69.6%	102	165	$275,136,503	$252,658,162

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ADE #5: CRM Activity Compliance by Group & Role (V.1.2)

Purpose of Analysis

Non-compliance of the CRM tools is a common problem. Companies invest in tools to automatically capture activities etc. It is important to understand if those tools are being used efficiently. Once you know what activities are being missed, you can use this information to estimate effort spent per account and rep.

Common Challenges and How to Accomplish with the Cien API

Using raw activity data, it is very difficult to determine if a lot of it is missing. Cien looks at representative reps that log most of their activities, and use those to estimate the amount of time spent per sales step. If a rep in general logs the same amount of activities, they have a high level of compliance. If their logged activities add up to much less, their compliance is low. As with most TrueAI attributes, the confidence values are very useful to understand the quality of the prediction.

Example SQL

```
SELECT
U.trueai_group, -- the name of the group
count(DISTINCT uh._sys_user_id) as rep_count, -- total number of reps in the period
avg(uh.ci_act_capt_lvl) as avg_act_capture_level, -- what % of activities do we estimate are actually
logged
avg(uh.ci_act_capt_lvl_conf) as avg_act_capture_level_confidence, -- what is the confidence in this
assessment?
COUNT(DISTINCT CASE WHEN U.trueai_user_role = 'Account Executive' THEN uh._sys_user_id END) as ae_count,
-- how many of the reps are AEs?
AVG( CASE WHEN U.trueai_user_role = 'Account Executive' THEN uh.ci_act_capt_lvl END) as
avg_ae_act_capture_level, -- what do they log?
COUNT(DISTINCT CASE WHEN U.trueai_user_role = 'Sales Development Rep' THEN uh._sys_user_id END) as
sdr_count, -- how many of the reps are SDRs?
AVG(CASE WHEN U.trueai_user_role = 'Sales Development Rep' THEN uh.ci_act_capt_lvl END) as
avg_sdr_act_capture_level, -- what do they log?
COUNT(DISTINCT CASE WHEN U.trueai_user_role = 'Account Manager' THEN uh._sys_user_id END) as am_count, --
how many of the reps are AMs?
AVG( CASE WHEN U.trueai_user_role = 'Account Manager' THEN uh.ci_act_capt_lvl END) as
avg_am_act_capture_level -- what do they log?
FROM users_history AS UH -- use the user history entity to get past data
INNER JOIN users AS U -- link w/ current user list
ON U._sys_doc_id = UH._sys_user_id -- always link via primary key _sys_doc_id
AND UH._sys_filt_end_date > U._sys_asof - 90 -- look at the last 90 days
AND U.trueai_termination_date  is null -- do not include reps that were terminated
GROUP BY U.trueai_group -- breakdown by group (ND is the default group)
ORDER BY 1; -- sort the group
```

Sample Result

There are 2 groups plus the default ND group. The South group consisting of just AEs are logging their data really well. The North group's Account Managers are not logging at the same level as their colleagues.

trueai_group	rep_count	avg_act_capture_level	avg_act_capture_level_confidence	ae_count	avg_ae_act_capture_level	sdr_count	avg_sdr_act_capture_level	am_count	avg_am_act_capture_level
ND	3		0%	0		0		0	
North	12	70%	78%	4	63%	6	53%	2	45%
South	7	88%	89%	7	88%	0		0	

ADE #6: AI Prediction Quality (V.1.2)

Purpose of Analysis

As Yogi Berra said: "Predictions are hard. Especially about the future." The Cien platform attempts to predict every sales step and many other things on an ongoing basis. To avoid model drift and declining prediction quality, as new data comes in, the prediction models are retrained and automatically updated online. Those quality scores are available to API developers.

Common Challenges and How to Accomplish with the Cien API

Most lead scoring tools provide very little transparency into the actual quality of their predictions. Cien is different. By looking at the `companies_history` entity you can get the latest quality scores on multiple quality metrics such as r^2 (correlation of coefficient) and AUC (area under curve), both from live sampling of actual outcomes and scores post-training. If you are concerned with the quality of a specific model, please contact api@cien.ai.

Example SQL

```
SELECT
CH._sys_processed_asof, -- date of processing
CH.di_pred_prospecting_r2, -- the prospecting  r2 score measured on performed predictions
CH.di_pred_prospecting_auc, -- the AUC score measured on performed predictions
CH.di_pred_prospecting_validation_score, -- the r2 score on the validation set during online training
CH.di_pred_new_logo_r2, -- same for new logo
CH.di_pred_new_logo_auc, -- the AUC score measured on performed predictions
CH.di_pred_selling_validation_score -- the r2 score on the validation set during online training
FROM companies_history CH -- the company history entity contains company specfic settings and stats
related to a specific processing cycle
ORDER BY CH._sys_processed_asof DESC -- sort by most recent
LIMIT 5; -- just take the top 5 results
```

Sample Result

In this case, the two models to determine prospecting and new logo selling are performing well. The r^2 and AUC scores are both calculated based on the latest outcomes so they tend to fluctuate a little for each processing cycle. The post-training validation score is only updated once a month when new data is applied into the training set, unless a manual re-training was initiated.

_sys_processed_asof	di_pred_prospecting_r2	di_pred_prospecting_auc	di_pred_prospecting_validation_score	di_pred_new_logo_r2	di_pred_new_logo_auc	di_pred_selling_validation_score
6/19/2022	0.990	0.840	0.877	0.970	0.830	0.863
6/8/2022	0.830	0.890	0.877	0.970	0.840	0.863
6/5/2022	0.800	0.890	0.877	0.970	0.840	0.863
6/3/2022	0.830	0.890	0.877	0.970	0.840	0.863
6/2/2022	0.830	0.890	0.877	0.970	0.840	0.863

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Deal Intelligence (DI) - Revenue & Buyer Journey Insights

Being able to isolate specific steps in the sales process, and understand the customer factors affecting outcomes is key to improving outcomes. The TrueAI platform makes that possible with the ssr and ssr_history entities.

DI #1: Historical Revenue
DI #2: Churn Analysis
DI #3: Pipeline Creation by Sale Type & Quality
DI #4: Pipeline Analysis by Creator Group & Role
DI #5: Win/Loss Analysis of New Logo Sales
DI #6: Revenue Concentration Analysis

DI #1: Historical Revenue (V.1.2)

Purpose of Analysis

Knowing past years' sales numbers may seem like the most basic analysis you can do of a GTM team, but as always, there are things that commonly skews the data and insights, leading to the wrong conclusions.

Common Challenges and How to Accomplish with the Cien API

The first thing to know is whether a particular deal is the first or a repeat purchase by a customer. Most RevOps teams rely on using the `crm_opp_type` field in the opps entity for that information, but if you look at that field carefully, you will usually find incorrect and inconsistently tagged opps. It's better if you also look for prior purchases by the same (de-duplicated) account. Other challenges may be opps with amounts in different currencies making aggregates difficult.

An easier way to get this information, is to use the `ssr_history` table, where the data has been normalized and it is easy to do sub-category summarization by year, type of sales team, role etc.

Example SQL

```
SELECT
date_part('year', SH._sys_filt_end_date) as year, -- which year?
SUM(SH.opp_won_amt) as won_amount, -- total booked revenue
(SELECT CH.company_currency  FROM companies_history CH ORDER BY _sys_asof DESC LIMIT 1) as currency, --
get the company primary currency
COUNT(SH._sys_doc_id) as won_deals, -- total won deals
AVG(SH.opp_won_amt) as avg_deal_size, -- the avg won deal size
SUM(CASE WHEN step_name = 'New Logo Selling' THEN SH.opp_won_amt END) as new_logo_amount, -- new logo
revenue only
SUM(CASE WHEN step_name = 'Upselling' THEN SH.opp_won_amt END) as upselling_amount, -- upselling revenue
only
SUM(CASE WHEN step_name = 'Upselling' AND SH.opp_sale_type = 'Expansion Sale' THEN SH.opp_won_amt END)
as upselling_expansion_amount, -- part of upselling that's expansion sale
SUM(CASE WHEN step_name = 'Upselling' AND SH.opp_sale_type = 'Renewal' THEN SH.opp_won_amt END) as
upselling_renewal_amount -- part of upselling that's renewals
FROM ssr_history AS SH -- get from the ssr history
WHERE step_name in ('New Logo Selling', 'Upselling') -- we only care about these two steps not the rest
AND SH.step_success = 'true'  -- we only care about deals that were won
GROUP BY date_part('year', SH._sys_filt_end_date)  -- group by year
ORDER BY 1 DESC -- sort most recent year first
LIMIT 5; -- go back 5 years
```

Sample Result

In this case, the company experienced stagnating growth between 2018 – 2020. By focusing on larger deal sizes, and better prospecting, growth returned in 2021. Provided that churn is low, this should allow for rapid revenue growth going forward, since the new logo revenue compounds as those customers buy more.

year	won_amount	currency	won_deals	avg_deal_size	new_logo_amount
2021	$47,644,159	USD	1014	$46,986	$17,460,905
2020	$28,402,642	USD	1017	$27,928	$9,975,059
2019	$23,934,230	USD	1168	$20,492	$7,961,850
2018	$26,215,867	USD	1379	$19,011	$10,080,340
2017	$ 11,313,692	USD	382	$29,617	$ 8,991,992

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DI #2: Churn Analysis (V.1.2)

Purpose of Analysis

Most B2B companies rely on repeat purchases by their clients, even if they do not have an explicit subscription model. Failing to sell to a lot of those clients again is usually considered one of the most severe GTM problems; therefore, the root causes must be investigated thoroughly since they can be attributed to product, customer segment, support practice, account management , or, more likely, a combination of those factors.

Common Challenges and How to Accomplish with the Cien API

It's always helpful to have a "customer-walk" year by year, which shows starting customers, new, churned, retained and ending customers. With that data you can then calculate churn rate, growth rate, etc, etc. The biggest challenge is to know when and if an account has actually churned. CRM systems like Salesforce do not have an account status field and churned date field. Sometimes you can get this info from ERP systems; however, then you may have trouble cross-referencing it with the CRM data, since it uses different names and IDs.

Cien determines the `trueai_first_purchase` and `trueai_churned_on` values for accounts in the `ssr` entity based on when the first deal was won, and if there are subsequent deals within a year of that point. Please note that this analysis will only be valid if renewals are logged as opps in the CRM. If not, additional data from an ERP/Billing system must be supplied.

Example SQL

```
SELECT -- just the last 5 years
Year,
COUNT(DISTINCT CASE WHEN date_part('year', trueai_first_purchase) < Y.year AND
COALESCE(date_part('year', trueai_churned_on),2100) >= Y.year THEN _sys_doc_id END) as boy_customers, --
get the beginning of year customers
COUNT(DISTINCT CASE WHEN date_part('year', trueai_first_purchase) = Y.year THEN _sys_doc_id END) as
new_customers, -- who bought for the first time
COUNT(DISTINCT CASE WHEN date_part('year', trueai_churned_on) = Y.year THEN _sys_doc_id END) as
churned_customers, -- who stopped buying this year
COUNT(DISTINCT CASE WHEN date_part('year', trueai_first_purchase) = Y.year THEN _sys_doc_id END) -
COUNT(DISTINCT CASE WHEN date_part('year', trueai_churned_on) = Y.year THEN _sys_doc_id END) as
net_new_customers, -- diff between new and lost
COUNT(DISTINCT CASE WHEN date_part('year', trueai_first_purchase) <= Y.year AND
COALESCE(date_part('year', trueai_churned_on),2100) > Y.year THEN _sys_doc_id END) as eoy_customers, --
customers at the end of the year
COUNT(DISTINCT CASE WHEN date_part('year', trueai_churned_on) = Y.year THEN _sys_doc_id END) / CAST(1 +
COUNT(DISTINCT CASE WHEN date_part('year', trueai_first_purchase) < Y.year AND
COALESCE(date_part('year', trueai_churned_on),2100) >= Y.year THEN _sys_doc_id END) as float)  as
churn_rate -- churn rate is boy / churned
FROM ssr S -- use SSR
CROSS JOIN (
 SELECT 2021 as year UNION
 SELECT 2020 as year UNION
 SELECT 2019 as year UNION
 SELECT 2018 as year UNION
 SELECT 2017 as year
) as Y -- create a pseudo year table to cross reference against
WHERE (S.trueai_account_is_master = 'true' or S.trueai_account_is_master IS NULL) -- remove dupes
GROUP BY Y.year -- group by year
ORDER BY 1 DESC
LIMIT 5; -- most recent data
```

Sample Result

In this case, account churn was not a problem during 2018-2020, but doubled in 2021, resulting in a new decrease of active customers that year.

year	boy_customers	new_customers	churned_customers	net_new_customers	eoy_customers
2021	1,396	111	175	-64	1,271
2020	1,273	127	87	40	1,396
2019	1,115	150	60	90	1,273
2018	708	199	36	163	1,115
2017	421	143	13	130	708

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DI #3: Pipeline Creation by Sale Type & Quality (V.1.2)

Purpose of Analysis

When surveying senior sales executives about their priorities, creating a bigger and better pipeline is almost always among their top 3 objectives. However, it is important to measure pipeline not just in deals and pipeline amount, but also in quality. It is often easy for reps to create low-quality pipeline by simply entering deals that they hope will close, doing so without performing the required qualification steps. Cien detects this automatically.

Common Challenges and How to Accomplish with the Cien API

As in other deal analysis, pipeline analysis needs to be segmented between existing and new logo business, since the win rates tend to be quite different. You should also predict the probability of a win for each deal based on the attributes of the account and what has occurred until now (e.g., the level of engagement during initial discovery). This is extremely hard to do using raw CRM data, since you often don't have access to clean outcomes and enough training data to build a reliable prediction model. Cien's Deal Intelligence uses AI models trained on millions of records - fine-tuned on your specific data - to predict those outcomes. Please see the ADE prediction accuracy example above for how to inspect the quality of deal predictions over time of your data.

As with most deal analysis, we use the `ssr_history` entity instead of the CRM `opps` table, but here we are looking at the Prospecting (for new logo selling) and Post-Sale Support (for upselling) steps by filtering by `step_name`.

Example SQL

```
SELECT
CAST(date_part('year', SH._sys_filt_end_date) as VARCHAR)  || '-0' ||
CAST(date_part('quarter',SH._sys_filt_end_date) as VARCHAR)  as year_qtr, -- create a quarter value
SUM(SH.opp_pipeline_amt) as total_pipeline_created, -- the pipeline created in the quarter
AVG(SH.step_next_success_prob) as predicted_opp_win_rate, -- the avg. predicted win rate of that
pipeline (pipe line quality)
SUM(SH.step_next_success_prob * SH.opp_pipeline_amt) as predicted_opp_win_amount, -- predicted win rate
times amount is the expected won amount resulting from this pipeline
SUM(CASE WHEN SH.step_name = 'Prospecting' THEN SH.opp_pipeline_amt END) as new_logo_pipeline, -- just
new logo pipeline
AVG(CASE WHEN SH.step_name = 'Prospecting' THEN SH.step_next_success_prob END) as
new_logo_predicted_opp_win_rate, -- the avg. predicted win rate for new logo only
--SUM(CASE WHEN SH.step_name = 'Prospecting' THEN SH.step_next_success_prob * SH.opp_pipeline_amt END )
as _predicted_opp_win_amount, -- win rate times amount for new logo pipeline
SUM(CASE WHEN SH.step_name = 'Post Sales Support' THEN SH.opp_pipeline_amt END) as upselling_pipeline,
-- just upselling pipeline
AVG(CASE WHEN SH.step_name = 'Post Sales Support' THEN SH.step_next_success_prob END) as
upselling_predicted_opp_win_rate -- the avg. predicted win rate for upselling only
--SUM(CASE WHEN SH.step_name = 'Post Sales Support' THEN SH.step_next_success_prob * SH.opp_pipeline_amt
END ) as upselling_predicted_opp_win_amount -- win rate times amount for upselling pipeline
FROM ssr AS S
INNER JOIN ssr_history AS SH
ON S._sys_doc_id = SH._sys_ssr_id
WHERE date_part('year', SH._sys_filt_end_date) >= date_part('year', SH._sys_asof) -2 AND
date_part('year', SH._sys_filt_end_date) < date_part('year', SH._sys_asof)  -- look at the last 2 full
years
AND (S.trueai_account_is_master = 'true' OR  S.trueai_account_is_master is Null)
AND SH.step_name in ('Prospecting', 'Post Sales Support') -- we're only interested in the steps where
pipeline is created
AND SH.step_success = 'true' -- we're only interested in successfully completed steps, since we want to
determine what will happen in the next step (selling)
GROUP BY date_part('year', SH._sys_filt_end_date), date_part('quarter', SH._sys_filt_end_date) -- group
by quarter
ORDER BY 1 DESC; -- order by year and quarter most recent
```

Sample Result

In this case, pipeline quantity has increased while pipeline quality has remained fairly steady. This is a good outcome, since it is easy to sacrifice proper qualification when trying to create a bigger pipeline. Worth noting, as in most companies, the probability of a win from an upselling opp is significantly higher (here almost 3X).

year_qtr	total_pipeline_created	predicted_opp_win_rate	predicted_opp_win_amount	new_logo_pipeline	new_logo_predicted_opp_win_rate	upselling_pipeline	upselling_predicted_opp_win_rate
2021-04	$193,082,451	44%	$93,300,578	$29,523,197	18%	$163,559,255	53%
2021-03	$169,548,637	42%	$67,557,600	$29,996,527	22%	$139,552,111	50%
2021-02	$125,370,416	44%	$59,061,419	$23,573,003	19%	$101,797,413	52%
2021-01	$223,850,916	45%	$116,651,892	$17,898,678	19%	$205,952,238	54%
2020-04	$204,615,052	48%	$117,202,623	$20,250,146	19%	$184,364,906	57%
2020-03	$58,606,686	43%	$23,979,042	$18,418,612	19%	$40,188,074	56%
2020-02	$65,489,854	44%	$27,049,820	$21,363,079	19%	$ 44,126,775	56%
2020-01	$115,796,755	47%	$57,469,296	$14,458,985	19%	$101,337,770	55%

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DI #4: Pipeline Analysis by Creator Group & Role (V.1.2)

Purpose of Analysis

While creating pipeline is top-of-mind for GTM leadership, there are often doubts whether specific groups and/or roles are contributing to the overall success of the sales team.

Common Challenges and How to Accomplish with the Cien API

Looking at the pipeline in aggregate is often not helpful, and it's easy to draw very wrong conclusions. E.g., a common complaint is that SDRs create poorly qualified pipeline that AEs then struggle to close. To determine if that is the case, you need to know who created the pipeline (hard if there are handoffs at different points in the buyer journey). You also need to know the role of each rep, and you need to have a way to objectively measure the quality (probability of winning the deal) of each deal. None of this data is available in the raw CRM feed in a standardized format.
Cien makes that analysis easy using the `ssr_history` and `users` entities. We are again relying on the `step_next_success_prob` field, which contains the success prediction of the subsequent step. The `step_success_prob` predicts the probability of success in the current step. I.e., in this example the probability of a conversion into an opportunity.

Example SQL

```
SELECT
U.trueai_group, -- the sales group
SUM(SH.opp_pipeline_amt) as total_pipeline_created, -- the pipeline created during the period
AVG(SH.step_next_success_prob) as predicted_opp_win_rate, -- the avg. predicted win rate of that
pipeline (pipeline quality)
SUM(SH.step_next_success_prob * SH.opp_pipeline_amt) as predicted_opp_win_amount, -- predicted win rate
times amount is the expected won amount resulting from this pipeline
SUM(CASE WHEN U.trueai_user_role_function = 'AE' THEN SH.opp_pipeline_amt END) as ae_pipeline, -- just
pipeline created by AEs
AVG(CASE WHEN U.trueai_user_role_function = 'AE' THEN SH.step_next_success_prob END) as
ae_predicted_opp_win_rate, -- the avg. predicted win rate for AE only
SUM(CASE WHEN U.trueai_user_role_function = 'SDR' THEN SH.opp_pipeline_amt END) as sdr_pipeline, -- just
pipeline created by SDRs
AVG(CASE WHEN U.trueai_user_role_function = 'SDR' THEN SH.step_next_success_prob END) as
sdr_predicted_opp_win_rate -- the avg. predicted win rate for SDR only
FROM ssr AS S -- link in SSR
INNER JOIN ssr_history AS SH -- the SSR history gives you the bulk of the details
ON S._sys_doc_id = SH._sys_ssr_id
INNER JOIN users U
ON SH.step_owner_id = U._sys_doc_id
WHERE date_part('year', SH._sys_filt_end_date) = date_part('year', SH._sys_asof)-1 -- look at last year
AND (S.trueai_account_is_master = 'true' OR  S.trueai_account_is_master IS NULL) -- remove duplicates
AND SH.step_name in ('Prospecting') -- let's only look at new logo prospecting
AND SH.step_success = 'true' -- we're only interested in successfully completed steps, since we want to
determine what will happen in the next step (selling)
AND U.trueai_user_role_function in ('SDR','AE') -- let's exclude other roles
GROUP BY U.trueai_group -- group by the sales team
ORDER BY 1; -- order by group
```

Sample Result

In this case, pipeline quality varies across groups with the LATAM group struggling to create high-quality new logo pipeline. Worth noting is that the SDR generated pipeline is significantly worse than the AE pipeline for the Enterprise group.

trueai_group	total_pipeline_created	predicted_opp_win_rate	predicted_opp_win_amount	ae_pipeline	ae_predicted_opp_win_rate	sdr_pipeline	sdr_predicted_opp_win_rate
LATAM	$6,461,662	13%	$842,752	$991,862	11%	$5,469,800	13%
EMEA	$9,097,549	18%	$1,710,604	$ 2,820,248	20%	$6,277,300	18%
Enterprise	$18,275,038	18%	$4,795,024	$ 3,964,363	27%	$14,310,675	17%
Mid Market	$18,932,554	21%	$3,734,812	$14,747,436	22%	$4,185,118	17%

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DI #5: Win/Loss Analysis of New Logo Sales (V.1.2)

Purpose of Analysis

Everyone wants to understand the secret to winning deals. There are tons of "best practices" out there, but what is really interesting is what factors have made reps win deals in your GTM organization. Here is a simple analysis that highlights what tends to be the factors with the biggest impact.

Common Challenges and How to Accomplish with the Cien API

Traditional win/loss analysis is often highly qualitative. The team pulls up X number of completed deals (usually just a fraction of all the deals in a quarter) and looks at what happened, what the customer did, how the rep responded and any other facts relevant to that specific deal; for example, where the customer was located or which industry it was in.

This analysis is often useful to understand broad trends, but it does not help much in ongoing global analysis of all deals and the most important factors for those, since most data is usually not readily available in the CRM database. And even if the data points are present, they are usually not adjusted based on data quality. E.g., raw activity count may vary a lot depending on if the rep is automatically recording their activities or not, whereas the `stakeholders_all_adj_duration` field estimates the total time the team has spent on the deal in a specific step, accounting for various levels of logging and prep time.

Cien makes that type of analysis available with a minimum of effort using the `ssr_history` entity grouping by the `step_outcome` field. For simplicity, this analysis does not include stakeholder roles and levels, (i.e., which dept. and seniority a contact has) – this information can sometimes have a big impact as well and is also available in the same entity.

Example SQL

```
SELECT
SH.step_outcome, -- outcome, in this case won or lost
AVG(SH.step_success_prob) as avg_success_prediction, -- what was the avg prediction for each outcome
COUNT(SH._sys_doc_id) AS deal_count,  -- count of deals
AVG(SH.step_length_in_days) AS avg_days, -- see how long each cycle is on avg in days
AVG(SH.stkhlds_all_dur) / 3600 AS avg_hours_deal, -- total time spent on the deal (divide seconds by
3600 to get hours)
AVG(SH.stkhlds_all_dur_eng) / 3600 as  avg_engaged_hours_deal, -- how many avtivities on avg were
engaged
AVG(SH.stkhlds_all_dur_eng) / CAST(AVG(SH.stkhlds_all_dur +1) as float) engagement_ratio, -- get the
ratio
AVG(CAST(SH.stkhlds_all_contacts_count as float)) as avg_number_of_contacts_involved  -- get the avg
number of contacts (need to cast to get a decimal)
FROM ssr_history SH -- ssr history has all the sales steps info
WHERE SH.step_name IN ('New Logo Selling') -- we're only interested in new logo
AND date_part('year', SH._sys_filt_end_date) = date_part('year', SH._sys_asof) - 1  -- look at full last
year
AND SH.step_outcome IS NOT NULL -- exclude deals that are not yet closed
GROUP by SH.step_outcome  -- group by outcome - in this case won or lost
ORDER BY 1 DESC; -- sort by outcome
```

Sample Result

In this case, the analysis shows a very common pattern, that more engagement results in a won deal (i.e., the customer is not going "radio-silent", and not responding to the rep's outreach). Factors such as number of buyer contacts involved does

not seem to have any impact on outcome. Won deals are wrapped up in around 4 months, but deals that end up being lost, run much longer. Not surprisingly, there is a big difference (2X) in the initial prediction of the deal being won.

It is important to recall that this prediction is done prior to any actual sales activity has started on the deal – it does not consider whether the deal is owned by a "good" or a "bad" rep, or exactly the effort they put into it (E.g., a rep could potentially completely ignore a good deal, hence losing it regardless of the initial high probability).

step_outcome	avg_success_prediction	deal_count	avg_days	avg_hours_deal	avg_engaged_hours_deal	engagement_ratio	avg_number_of_contacts_involved
Closed Won	27%	206	111	148	98	66%	3.5
Closed Lost	13%	2,036	410	42	16	39%	3.5

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DI #6: Revenue Concentration Analysis (V.1.2)

Purpose of Analysis

Having too much revenue concentrated in a few large clients poses a great risk for a GTM organization. At the same time, many revenue leaders cite the Pareto principle (80% of your revenue comes from 20% of your clients) as almost inevitable.

Common Challenges and How to Accomplish with the Cien API

This analysis, unlike most other analyses, is not dependent on a lot of cleaning up of data, except that a customer with multiple purchases within a year needs to be consolidated.

The tricky part of this analysis is to use running totals based on different sort orders. By using the `PARTITION` and `OVER` keywords in SQL, it is possible to get the number of the largest account that represents 80% of total annual revenue and compare that to the total number of accounts that bought in the year.

Example SQL

```
SELECT
date_part('year', _sys_filt_end_date) as year, -- get the year
SUM(opp_won_amt) as sum_sales, -- get the sum of sales
COUNT(DISTINCT _sys_ssr_id) as customer_count, -- get # of buying customers
AVG(opp_won_amt) as avg_sale_per_customer, -- get avg rev per account
MAX(opp_won_amt) as biggest_customer_amt, -- get size of biggest account
COUNT(DISTINCT CASE WHEN cumul_by_cust_size <= (total_won * 0.8) THEN _sys_ssr_id END) as
eighty_pct_revenue_customer_count, -- include all up to 80% of rev to get pareto number
COUNT(DISTINCT CASE WHEN cumul_by_cust_size <= (total_won * 0.8) THEN _sys_ssr_id END) /
CAST(COUNT(DISTINCT _sys_ssr_id) as decimal) as eighty_pct_revenue_customer_percentage -- percentage of
pareto number
FROM -- second agg to do the rankings
 (SELECT
 _sys_filt_end_date, -- get the date
 _sys_ssr_id,
 opp_won_amt,
 ROW_NUMBER() OVER (PARTITION BY date_part('year', _sys_filt_end_date) ORDER BY _sys_filt_end_date) as
sale_num, -- get the number of the account based on purchase date
 SUM(opp_won_amt) OVER (PARTITION BY date_part('year', _sys_filt_end_date)  ORDER BY _sys_filt_end_date)
as cumul_amt_won, -- add up sales for cumulative total based on date
 SUM(opp_won_amt) OVER (PARTITION BY date_part('year', _sys_filt_end_date)) as total_won, -- get the
total won in the grouping (year)
 ROW_NUMBER() OVER (PARTITION BY date_part('year', _sys_filt_end_date) ORDER BY opp_won_amt DESC) as
cust_size_rank, -- get the rank per year w/ 1 being the biggest customer
 SUM(opp_won_amt) OVER (PARTITION BY date_part('year', _sys_filt_end_date) ORDER BY opp_won_amt DESC) as
cumul_by_cust_size -- get the ordering by size
 FROM -- first aggregation just get rev per year and account
   (SELECT
   MAX(_sys_filt_end_date) as _sys_filt_end_date, -- get the highest date for a purchase of that account
   _sys_ssr_id, -- get the unique account
   SUM(SH.opp_won_amt) as opp_won_amt -- sum up all purchases of that account
   FROM ssr_history SH
   WHERE SH.opp_won_amt > 0 -- only care about clients that bought
   AND date_part('year', SH._sys_filt_end_date) >= date_part('year', SH._sys_asof)-5 -- go back 5 years
   AND date_part('year', SH._sys_filt_end_date) < date_part('year', SH._sys_asof) -- exclude current
partial year
   GROUP BY date_part('year', SH._sys_filt_end_date), SH._sys_ssr_id -- group by account
   ) as SH_by_account -- first agg
 )  as SH_w_ranking -- second agg w/ ranking agg
 GROUP BY date_part('year', _sys_filt_end_date)
ORDER BY date_part('year', _sys_filt_end_date) DESC;
```

Sample Result

In this case, the revenue concentration has increased over the last 5 years, despite much higher revenue. This is due to the largest clients now being 10X bigger than 5 years ago; a great accomplishment of course, but it does also increase the revenue risk.

year	sum_sales	customer_count	avg_sale_per_customer	biggest_customer_amt	eighty_pct_revenue_customer_count	eighty_pct_revenue_customer_percentage
2021	$550,545,641	844	$50,855	$19,558,632	210	25%
2020	$306,118,228	708	$440,506	$10,037,060	181	26%
2019	$199,708,922	642	$315,310	$8,693,700	196	31%
2018	$163,111,824	441	$348,462	$10,173,060	130	29%
2017	$72,672,920	311	$221,135	$1,961,263	126	41%

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Value Intelligence (VI) - Fairness & Value Creation in the GTM Org

If you want to understand rep performance, you must look at what value each rep received, as new leads, existing accounts, or new opportunities from an SDR team. Once you do, you will often find that top performance is correlated with having access to high potential accounts and a great pipeline, created by other reps.

VI #1: Lead Generation by Quarter broken down by Creator Dept and Quality

VI #1: Lead Generation by Quarter broken down by Creator Dept and Quality (V.1.2)

Purpose of Analysis

To build new logo pipeline, you need to generate good new leads (or accounts if you use an Account Based approach). Those can be either inbound or outbound leads in different industries and locations. The reps should then follow up and attempt to convert those leads into opportunities (some companies call this Sales Qualified Leads – SQL).

The most common rep complaint is that the leads are not of good quality, and that marketing is not delivering enough lead generation value. That can easily be determined with this analysis.

Common Challenges and How to Accomplish with the Cien API

The challenge to determine lead value comes down to having accurate prediction of the propensity of a specific lead to convert. To do so depends on a lot of factors and is usually not available in the CRM data. Sometimes the company does employ a lead scoring algorithm, but unless there is transparency in how the scoring works, it is often just a rough guide to which leads are the most likely to convert. As with other areas, duplicates of leads and accounts will often cause confusing results, unless rectified prior to analysis.

Unlike most other analyses, we are using the hat_leads entity here instead of the ssr_history, since it combines the first three standardized steps in the sales process (lead gen, untouched and prospecting), hence making the queries easier to understand. We then join with the users entity to understand who created the lead so we can compare outcomes.

Example SQL

```
CAST(date_part('year', HL._sys_filt_start_date) as VARCHAR) || '-0' ||  CAST(date_part('quarter',
HL._sys_filt_start_date) as varchar) as year_qtr, -- the year and quarter
Count(HL._sys_doc_id) as lead_gen_count, -- how many leads were generated
COUNT(CASE WHEN HL.trueai_first_touch is not null THEN HL._sys_doc_id END ) as touched_count, -- how many
of those were touched
COUNT(CASE WHEN HL.trueai_converted_date is not null THEN HL._sys_doc_id END ) as converted_count, -- how
many were converted into opps?
AVG(HL.trueai_probability_of_conversion) as prob_conversion, -- what was the avg prediction probability of
conversion of all?
AVG(CASE WHEN HL.trueai_first_touch is not null THEN HL.trueai_probability_of_conversion END) as
prob_conversion_of_touched, -- what was the prediction probaility of conversion on the ones that were
actially touched
COUNT(CASE WHEN U.trueai_user_role_dept = 'MKT' THEN  HL._sys_doc_id END) as lead_count_mktng_gen, -- how
many were generated by the Marketing Dept?
COUNT(CASE WHEN U.trueai_user_role_dept = 'SALES' THEN  HL._sys_doc_id END) as lead_count_sales_gen, -- how
many were generated by the Sales Dept?
AVG(CASE WHEN U.trueai_user_role_dept = 'MKT' THEN  HL.trueai_probability_of_conversion END) as
prob_conversion_mktng_gen, -- what was the avg. predicted prob of the marketing leads
AVG(CASE WHEN U.trueai_user_role_dept = 'SALES' THEN  HL.trueai_probability_of_conversion END) as
prob_conversion_sales_gen, -- what was the avg predictied prob of the sales lead?
SUM(HL.trueai_vi_leadgen_value) as vi_lead_gen_value -- what was the value intelligence lead value for the
leads in the quarter?
FROM hat_leads AS HL -- use hat_leads instead of SSR to look at the prospecting in a single row
(ssr_history has 3 steps)
INNER JOIN users AS U -- link in users to understand creator role
ON HL.trueai_creator_id = U._sys_doc_id -- always _sys_doc_id is PK
WHERE date_part('year', HL._sys_filt_start_date) > date_part('year', HL._sys_asof) - 2 -- look back 1 year
AND date_part('year', HL._sys_filt_start_date) <> date_part('year', HL._sys_asof)  -- do not include
current partial year
GROUP BY date_part('year', HL._sys_filt_start_date), date_part('quarter', HL._sys_filt_start_date) -- group
by year and quarter
ORDER BY 1 DESC; -- most recent first
```

Sample Result

In this case, the absolute number of leads generated per quarter has remained fairly steady. Around 25% of those are actively prospected by the sales team. The team is picking leads that are more likely to be converted. Around 5% of the leads are generated by the sales team themselves. The value created follows the multiplication of the expected probability of conversion and total volume of leads.

year_qtr	lead_gen_count	touched_count	converted_count	prob_conversion	prob_conversion_of_touched	lead_count_mktng_gen	lead_count_sales_gen	prob_conversion_mktng_gen	prob_conversion_sales_gen	vi_lead_gen_value
2021-04	471,002	103,776	23,677	2.0%	7.2%	449,597	18,204	1.4%	15.5%	$21,708,564
2021-03	536,079	101,524	26,233	1.1%	5.1%	510,903	20,473	0.7%	9.8%	$18,531,651
2021-02	472,931	94,659	25,901	1.3%	4.7%	396,213	72,037	0.7%	3.6%	$19,138,033

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Coaching Intelligence (CI) - Rep Skills & Behavior Analysis

Every GTM organization wants to develop their reps, but if you don't understand their current behavior and skills, it is hard to provide meaningful individualized coaching, and next to impossible to evaluate the effectiveness of different training, available tools, etc. Cien changes that. Now, previously unavailable data points are at your fingertips.

CI #1: Rep Hiring & Termination Analysis
CI #2: Time to Lead
CI #3: Quarterly Rep Performance Analysis

CI #1: Rep Hiring & Termination Analysis (V.1.2)

Purpose of Analysis

Just like you need to understand gained and lost accounts, you need to understand how the size of the sales team has changed over time and the makeup of the roles of the team.

Common Challenges and How to Accomplish with the Cien API

Unless you have access to accurate historical HR records, building this type of analysis from just CRM data can be difficult since the typical CRM database typically has hundreds or thousands of users that are not directly part of the sales team. The challenges are to determine what roles users have, if they are managers or individual contributors and if they are still working or have been terminated (but perhaps not yet set to inactive). Cien does that automatically, and also has an Admin tool that lets you override the role, group and manager classification manually. That way you know you have the correct base data for all other performance analysis (because it would not make a lot of sense to compare junior SDR with a Senior Enterprise rep for example).

This data resides in the users entity, which then gets copied over to the users_history table, so it can be tracked over time. As with most other entities, this data gets retroactively populated for multiple years upon initial processing of a CRM dataset.

The key fields are the `trueai_user_role` (a set of 15 specific CRM user roles), `trueai_user_role_function` (consolidated into higher level functions such as AE, AM, SDR etc.) and `trueai_termination_date` (which looks for multiple signals that a user is terminated – e.g. no logins or no activities in addition to the active flag).

Example SQL

```
SELECT
Y.year as year, -- the year
COUNT(DISTINCT CASE WHEN date_part('year', U.trueai_hire_date) < Y.year AND date_part('year',
COALESCE(U.trueai_termination_date, make_date(2100, 1,1))) >= Y.Year  THEN U._sys_doc_id END) as
sales_user_count_boy, -- users in the beginning of the year
COUNT(DISTINCT CASE WHEN date_part('year', U.trueai_hire_date) = Y.year THEN U._sys_doc_id END) as
sales_user_hired, -- count of hired
COUNT(DISTINCT CASE WHEN date_part('year', COALESCE(U.trueai_termination_date, make_date(2100, 1,1))) =
Y.year THEN U._sys_doc_id END)* -1 as sales_user_terminated, -- count of terminated (turn into neg
number)
COUNT(DISTINCT CASE WHEN date_part('year', U.trueai_hire_date) <= Y.year AND date_part('year',
COALESCE(U.trueai_termination_date, make_date(2100, 1,1))) > Y.Year  THEN U._sys_doc_id END) as
sales_user_count_eoy, -- end of year count, should match next year boy
COUNT(DISTINCT CASE WHEN U.trueai_user_role_function = 'AE' AND date_part('year', U.trueai_hire_date) <=
Y.year AND date_part('year', COALESCE(U.trueai_termination_date, make_date(2100, 1,1))) > Y.Year  THEN
U._sys_doc_id END) as ae_count_eoy, -- account execs s at end of year (use user_role_function field
instead of user_role to simplify query)
COUNT(DISTINCT CASE WHEN U.trueai_user_role_function = 'AM' AND date_part('year', U.trueai_hire_date) <=
Y.year AND date_part('year', COALESCE(U.trueai_termination_date, make_date(2100, 1,1))) > Y.Year  THEN
U._sys_doc_id END) as am_count_eoy,-- account managers at end of year (use user_role_function field
instead of user_role to simplify query)
COUNT(DISTINCT CASE WHEN U.trueai_user_role_function = 'SDR' AND date_part('year', U.trueai_hire_date)
<= Y.year AND date_part('year', COALESCE(U.trueai_termination_date, make_date(2100, 1,1))) > Y.Year
THEN U._sys_doc_id END) as sdr_count_eoy,-- sales development reps at end of year (use
user_role_function field instead of user_role to simplify query)
COUNT(DISTINCT CASE WHEN U.trueai_user_role_function = 'MGMT' AND date_part('year', U.trueai_hire_date)
<= Y.year AND date_part('year', COALESCE(U.trueai_termination_date, make_date(2100, 1,1))) > Y.Year
THEN U._sys_doc_id END) as mgmt_count_eoy,-- managers at end of year (use user_role_function field
instead of user_role to simplify query)
```

```
COUNT(DISTINCT CASE WHEN U.trueai_user_role_function = 'OTHER' AND date_part('year', U.trueai_hire_date)
<= Y.year AND date_part('year', COALESCE(U.trueai_termination_date, make_date(2100, 1,1))) > Y.Year
THEN U._sys_doc_id END)  as other_count_eoy,-- others (e.g. sales engineers) at end of year (use
user_role_function field instead of user_role to simplify query)
COUNT(DISTINCT CASE WHEN date_part('year', U.trueai_hire_date) <= Y.year AND date_part('year',
COALESCE(U.trueai_termination_date, make_date(2100, 1,1))) > Y.Year  THEN U._sys_doc_id END) /
CAST(COUNT(DISTINCT CASE WHEN U.trueai_user_role_function = 'MGMT' AND date_part('year',
U.trueai_hire_date) <= Y.year AND date_part('year', COALESCE(U.trueai_termination_date, make_date(2100,
1,1))) > Y.Year  THEN U._sys_doc_id END) as decimal)  as rep_mgr_ratio_eoy
FROM users as U -- get the user info
CROSS JOIN (
   SELECT 2021 as year UNION
   SELECT 2020 as year UNION
   SELECT 2019 as year UNION
   SELECT 2018 as year UNION
   SELECT 2017 as year
) as Y -- create a pseudo year table to cross reference against
WHERE U.trueai_user_role_dept = 'SALES' -- only the sales users
GROUP BY Y.year -- group by year
ORDER BY 1 DESC; -- most recent data
-----------------
```

Sample Result

In this case, the team has grown consistently for the last 5 years, with the biggest increase in account management, reflecting the larger # of supported accounts. Rep to manager ratio (including supporting roles like Sales Engineers) has decreased to 4.7 from around 3.5 a few years ago.

year	sales_user_count_boy	sales_user_hired	sales_user_terminated	sales_user_count_eoy	ae_count_eoy	am_count_eoy	sdr_count_eoy	mgmt_count_eoy	other_count_eoy	rep_mgr_ratio_eoy
2021	1954	731	-464	2221	571	358	206	471	615	4.7
2020	1583	573	-202	1954	546	298	170	445	495	4.3
2019	1303	552	-272	1583	451	241	111	409	371	3.8
2018	995	510	-202	1303	370	212	89	357	275	3.7
2017	766	459	-230	995	249	175	78	295	198	3.5

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CI #2: Time to Lead (V.1.2)

Purpose of Analysis

It is well known that there is a benefit to responding quickly to inbound leads. However, there may be doubts about how critical response time is in a specific organization and how good the reps are on average to respond to inbound leads. This analysis makes it easy to answer those questions.

Common Challenges and How to Accomplish with the Cien API

To determine lead conversion (into a sales qualified lead), you first need to have a set of clean lead records. Using the CRM `leads` entity will often trick you, since the conversion may not be recorded correctly, and there might be multiple leads per account, skewing the results downwards. We recommend that you use the derived `hat_leads` entity instead, which solves that problem. Secondly, it's important to understand which of the leads are inbound. Cien makes that easy by creating a `trueai_leadsource_is_inbound` field. And lastly, you need to look at activity and conversion patterns to determine when a lead was actually touched. The `trueai_first_touch` field gives you that information.

Example SQL

```
SELECT
CASE WHEN CAST( HL.trueai_first_touch - HL.trueai_createdon  as float) > 7 THEN 'Over a week'
 WHEN CAST( HL.trueai_first_touch - HL.trueai_createdon  as float) > 3 THEN 'Over three days'
 WHEN CAST( HL.trueai_first_touch - HL.trueai_createdon  as float) > 1 THEN 'Over one day'
 WHEN CAST( HL.trueai_first_touch - HL.trueai_createdon  as float) * 24 > 6 THEN 'Over 6 hours'
 WHEN CAST( HL.trueai_first_touch - HL.trueai_createdon  as float) * 24 > 1 THEN 'Over 1 hour'
 ELSE 'Within Minutes' END as time_to_touch_bucket, -- derived bucket
AVG(CAST( HL.trueai_first_touch - HL.trueai_createdon  as float) ) * 24 as  avg_hours, -- time in hours
count(HL.trueai_first_touch) as touched_leads, -- total touched leads
AVG(HL.trueai_probability_of_conversion) as pred_conversion_rate,  -- the expected prediction rate
(gives you the overall quality but will not match the outcome rate because of the filters)
count(HL.trueai_converted_date) as converted,
(count(HL.trueai_converted_date) /  CAST(COUNT(trueai_first_touch) as float)) as actual_conversion_rate
FROM hat_leads HL -- use hat_leads since those have been consolidated if there were multiple leads
and/or accounts from a single company
WHERE HL._sys_filt_end_date BETWEEN HL._sys_asof - 180 AND HL._sys_asof - 90 -- let's only look at the
last 90 days
AND HL.trueai_leadsource_is_inbound = 'true'  -- we're only interested in inbound leads coming to us
AND CAST( HL.trueai_first_touch - HL.trueai_createdon  as float)  < 21 -- there are leads that are not
touched for over 3 weeks - let's exclude those
GROUP BY
 CASE WHEN CAST( HL.trueai_first_touch - HL.trueai_createdon  as float) > 7 THEN 'Over a week'
 WHEN CAST( HL.trueai_first_touch - HL.trueai_createdon  as float) > 3 THEN 'Over three days'
 WHEN CAST( HL.trueai_first_touch - HL.trueai_createdon  as float) > 1 THEN 'Over one day'
 WHEN CAST( HL.trueai_first_touch - HL.trueai_createdon  as float) * 24 > 6 THEN 'Over 6 hours'
 WHEN CAST( HL.trueai_first_touch - HL.trueai_createdon  as float) * 24 > 1 THEN 'Over 1 hour'
 ELSE 'Within Minutes' END -- great a derived category field and group by it
ORDER BY avg_hours DESC; -- sort by slowest response first
```

Sample Result

There is a dramatic difference in outcome between responding immediately and later. The `pred_conversion_rate` allows you to understand if the reps are already selecting the best leads for fast follow up (that is the case here). In general, this sales organization is fairly good at responding quickly to leads.

time_to_touch_bucket	avg_hours	touched_leads	pred_conversion_rate	converted	actual_conversion_rate
Over a week	855.9	85	10%	7	8%

Over three days	120.1	71	15%	9	13%
Over one day	47.8	43	21%	11	26%
Over 6 hours	17.1	45	17%	6	13%
Over 1 hour	2.6	85	18%	12	14%
Within Minutes	0.1	840	23%	215	26%

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CI #3: Quarterly Rep Performance Analysis (V.1.3)

Purpose of Analysis

Every single sales team has A, B & C players. What causes someone to become an A player? The TrueAI platform can pinpoint differences in skills and behavior.

Common Challenges and How to Accomplish with the Cien API

Raw CRM data never contains specific information about rep behaviors and skills, just the actual results. Even categorizing reps as over-, or underperformers can be challenging; for example, if you have multiple divisions who have different expected revenue or pipeline creation goals.

The `users_history` entity has a perf section which makes it easy to look at quarterly performance and exclude reps who just started. The key attributes to look at are `ci_closing_ability` and `ci_deal_maximizing`. But we also want to look at other attributes like `user_tenure` (at the time of analysis) and `vi_value_received` (from Value Intelligence) , to see if those have a big impact on the results.

Example SQL

```
SELECT
UH.ci_perf_qtly_performance_tier, -- performance tiers
Count(DISTINCT UH._sys_user_id) as rep_count, -- number of reps in each tier
SUM(UH.di_trueai_opps_won_amt) as total_qtly_rev, -- total revenue from each tier in the qtr
AVG(UH.di_trueai_opps_won_amt)* 3 as avg_qtly_rev, -- avg rev per quarter
AVG(cast(UH.di_trueai_opps_won_count  as decimal) * 3 ) as avg_won_deals, -- how many deals did they win
AVG(UH.trueai_tenure) as avg_tenure, -- avg tenure
AVG(UH.di_trueai_opps_open_amt) as open_pipeline,
AVG(UH.vi_value_received_tot * 3) as quarter_value_received, -- value received in the qtr
ROUND(CAST(AVG((ci_closing_ability + ci_deal_maximizing +  ci_discovery_skills + ci_engmt_ability +
ci_work_effort) / 5 ) * 20 AS NUMERIC), 1) * 5 as total_skill_avg -- avg skill score
FROM users AS U -- users
INNER JOIN users_history AS UH -- user history for historical skills & results
ON U._sys_doc_id = UH._sys_user_id -- all entities use _sys_doc_id as primary key
WHERE
date_part('year', UH._sys_filt_end_date) = date_part('year', U._sys_asof) -1  -- last year
AND date_part('quarter', UH._sys_filt_end_date ) = 4 -- just look at 4th quarter
AND UH.trueai_user_role = 'Account Executive'  -- just look at AE's
AND ci_perf_qtly_performance_tier IS NOT NULL --  exclude ramping reps etc.
GROUP BY UH.ci_perf_qtly_performance_tier -- performance tiers
ORDER BY 1; -- sort by performance tier
```

Sample Result

In this case, several very clear insights emerge when you compare reps of different performance tiers against each other. First, top performers deliver most of the revenue by far. They have on avg. 3 years of tenure, but so does the performer group. They have a bigger available pipeline and do receive more value (this is just looking at the current quarter, usually better to look at a longer period), and their avg skills are higher than their peers. All together this explains their over performance.

ci_perf_qtly_performance_tier	rep_count	total_qtly_rev	avg_qtly_rev	avg_won_deals	avg_tenure	open_pipeline	quarter_value_received	total_skill_avg
Overperformer	23	$20,263,277	$921,058	$4	35	$4,609,325	$91,682	60
Performer	11	$1,850,688	$179,099	$4	33	$2,692,420	$22,160	55
Underperformer	65	$1,125,645	$18,555	$1	22	$1,729,695	$54,190	50

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COMMON NAMING CONVENTIONS & SPECIAL FIELDS

Prefixes	Description
sys	Indicates that the data field is a system field, like an ID, or a date context field.
crm_	Indicates that the data is passed through straight from the source CRM field without any additional AI processing.
trueai_	Indicates that the data has been run through the TrueAI engine, for further standardization or predictions etc. These fields are usually accompanied by additional metadata fields such as confidence or rules applied. *Please note that in derived entities such as SSR, SSR History and User History, this prefix is omitted for brevity - unless otherwise stated, all fields in those entities are TrueAI fields.*
ade_	Indicates that the value is part of the Automatic Data Enhancement functionality of the TrueAI engine.
di_	Indicates that the value is part of the Deal Intelligence functionality of the TrueAI engine.
vi_	Indicates that the value is part of the Value Intelligence functionality of the TrueAI engine.
ci_	Indicates that the value is part of the Coaching Intelligence functionality of the TrueAI engine.
Suffixes	Description
_conf	This suffix on a field is an indication of the confidence in the classification of the TrueAI field with the same name. A confidence of 0 means that there was no data available to determine a classification (should usually be excluded from averages). A confidence value of Null means that the record is not applicable for this classification.
_rule	This suffix on a field is an indication of which rule was applied in the classification of a TrueAI. The full description of the rule can be looked up in the Rules entity.
_pi	This suffix on a field is an indication that the information is part of "Peek Inside" for a particular field. I.e. additional data points providing transparency and explanation to a particular TrueAI prediction.

Special Fields	Description

_sys_filter_start_date	The start and end filter dates are the only non UTC dates in the API, where the date been adjusted to the company's primary time-zone. Therefore the same date as UTC can be a day later if timezone offset has been set to a US time zone.
_sys_doc_id	This is always the unique primary key of the record for an entity, carried over from the CRM system unless no corresponding entity exists
_sys_ssr_id	The ssr record this particular record has been consolidated into.
_asof	The most recent data obtained for this record (does not mean last updated).

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API REFERENCE

The following is a documentation of all data entities and fields in the Cien.ai API. The API contains 15 data entities and over 1,000 data fields, but for most use cases you only need to use a fraction of those. The derived entities like `ssr_history` and `users_history` make accurate historical reporting much easier than ever before.

Entity	Description
leads	The CRM lead entity with additional TrueAI fields.
accounts	The CRM account entity with additional TrueAI fields.
contacts	The CRM contact entity with additional TrueAI fields.
opps	The CRM opportunity entity with additional TrueAI fields.
opps_histories	The CRM opportunity history entity with additional TrueAI fields.
opps_stages	The master list of used opportunity stages plus TrueAI fields.
activities	The CRM activity entity with additional TrueAI fields. Due to size, typically available separately from the other entities.
users	Users in the CRM system plus any additional users in the TrueAI platform.
users_history	A derived entity that represents a single month of a specific user (except for users with "Other User" role). Typically created retroactively for up to 5 years. Grouped into: • User for user info • DI for Deal Intelligence • CI for Coaching Intelligence • ADE for Automatic Data Enhancement metrics • Activities.
hat_leads	Derived entity that represents a prospecting cycle. Consolidated from one or more leads and/or accounts. First data takes precedence.
customer_accounts	Derived entity that represents an account in a single specific post selling cycle with the appropriate TrueAI fields for that sales step.
groups	

ssr	The Single Sales Record (SSR): a deduplicated & consolidated record of all leads and accounts. TrueAI fields explain the sales process and overall account performance.
ssr_history	A derived entity with an entry for each applicable sales step the SSR has entered. Steps always follows this sequence: **Lead Gen, Untouched, Prospecting, New Logo, Post-Sales Support, Upselling.** The last steps can be repeated multiple times. Grouped by • _sys for system field • step for info about the current step • entity for info about related entities • opp for info about the current opportunity if New Logo or Upselling & • stakeholder for info about the buyer personas involved in the step.
companies_history	Information about this API feed's specific company and quality metrics over time. E.g. makes it possible to see if the quality of a prediction model has deteriorated over time. A new entry is generated upon each processing cycle. Unlike other entities, this data is not retroactive prior to the first processing.
metadata_entities metadata_fields metadata_classes	Information that has been used to create this document, outlining all available API data entities; fields, display names, descriptions for each of them. Also the possible values for trueai fields w/ a standardized set of options (classes).
rule list	The rule codes and descriptions for the platform, primarily related to how the SSR history file is organized and how looked up data from related entities has been populated.

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ENTITY DOCUMENTATION

leads

The CRM lead entity. Data in three sections: _sys_ for system fields, crm for original CRM field and trueai for the enhanced fields.

Leads field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_filt_end_date	Filter End Date	DATE		The end date of the record, stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The start date of the record, stripped of time
_sys_last_modifiedon	Last Modified On	DATETIME		The date of the last data modification in the platform
_sys_ssr_id	SSR ID	STRING	50	Id of the SSR document the record belongs to
crm_account_id	CRM Account ID	STRING	50	CRM account id of the lead
crm_addr_city	CRM Address City	STRING	150	Lead's city in the CRM
crm_addr_country	CRM Address Country	STRING	150	Lead's country in the CRM
crm_addr_postal_code	CRM Address Postal Code	STRING	150	Lead's postal code in the CRM
crm_addr_state	CRM Address State	STRING	150	Lead's state in the CRM
crm_addr_street	CRM Address Street	STRING	150	Lead's street in the CRM

Leads field_name	display_name	data_type	length	description
crm_complt	CRM Completeness	FLOAT		Lead's completeness score based on the CRM data
crm_complt_contact	CRM Completeness Contact	FLOAT		Lead's contact information completeness score based on the CRM data
crm_complt_contact_method	CRM Completeness Contact Method	FLOAT		Lead's contact method completeness score based on the CRM data
crm_complt_geo	CRM Completeness Geo	FLOAT		Lead's location completeness score based on the CRM data
crm_complt_marketing	CRM Completeness Marketing	FLOAT		Lead's marketing completeness score based on the CRM data
crm_contact_title	CRM Contact Title	STRING	150	Lead's title in the CRM
crm_converted_account_id	CRM Converted Account ID	STRING	50	This field has been deprecated.
crm_converted_contact_id	CRM Converted Contact ID	STRING	50	Lead's contact id in the CRM
crm_converted_date	CRM Converted Date	DATETIME		Lead conversion date in the CRM
crm_converted_opp_id	CRM Converted Opp ID	STRING	50	Lead's opp id in the CRM
crm_createdon	CRM Created On	DATETIME		Lead creation date in the CRM

Leads field_name	display_name	data_type	length	description
crm_creator_id	CRM Creator ID	STRING	50	Lead creator's id in the CRM
crm_custom_value_1	CRM Custom Value 1	STRING	150	Custom categorical variable
crm_custom_value_2	CRM Custom Value 2	STRING	150	Custom categorical variable
crm_custom_value_3	CRM Custom Value 3	STRING	150	Custom categorical variable
crm_deep_link	CRM Deep Link	STRING	500	Link to the lead in the remote system (such as Salesforce)
crm_email	CRM Email	STRING	150	Lead's email
crm_first_name	CRM First Name	STRING	150	Lead's first name
crm_industry	CRM Industry	STRING	150	Lead's industry in the CRM
crm_last_act_time	CRM Last Activity Time	DATETIME		Lead's last activity time in the CRM
crm_last_name	CRM Last Name	STRING	150	Lead's last name
crm_leadsource	CRM Lead Source	STRING	150	Lead's lead source in the CRM
crm_modifiedon	CRM Modified On	DATETIME		Lead modified on date in the CRM
crm_name	CRM Name	STRING	500	Lead name in the CRM
crm_num_employees	CRM Num Employees	INTEGER		Lead's number of employees in the CRM
crm_owner_id	CRM Owner ID	STRING	50	Lead owner's id in the CRM

Leads

field_name	display_name	data_type	length	description
crm_phone	CRM Phone	STRING	150	Lead's phone number
crm_status	CRM Status	STRING	150	Lead's status in the CRM
trueai_addr_city	Address City	STRING	50	Lead's city
trueai_addr_country	Address Country	STRING	50	Lead's country
trueai_addr_lat	Address Lat	FLOAT		Lead's latitude
trueai_addr_long	Address Long	FLOAT		Lead's longitude
trueai_addr_postal_code	Address Postal Code	STRING	50	Lead's postal code
trueai_addr_rule	Address Rule	INTEGER		Lead's address prediction rule
trueai_addr_state	Address State	STRING	50	Lead's state
trueai_addr_street	Address Street	STRING	50	Lead's street
trueai_company_dupe_conf	Company Duplicate Confidence	FLOAT		Lead's company duplication confidence
trueai_company_dupe_id	Company Duplicate ID	STRING	50	Lead's company duplication id
trueai_company_size	Company Size	STRING	50	Lead's standardized company size
trueai_company_size_rule	Company Size Rule	INTEGER		Lead's standardized company size prediction rule
trueai_complt	Completeness	FLOAT		Completeness score of the lead based on the standardized data
trueai_complt_contact	Completeness Contact	FLOAT		Contact information completeness score of the lead based on the standardized data

Leads field_name	display_name	data_type	length	description
trueai_complt_contact_method	Completeness Contact Method	FLOAT		Contact method completeness score of the lead based on the standardized data
trueai_complt_geo	Completeness Geo	FLOAT		Location completeness score of the lead based on the standardized data
trueai_complt_marketing	Completeness Marketing	FLOAT		Marketing completeness score of the lead based on the standardized data
trueai_converted_date	Converted Date	DATETIME		Lead converted date
trueai_createdon	Created On	DATETIME		Lead creation date
trueai_creator_id	Creator ID	STRING	50	Lead creator's id
trueai_dur	Duration	STRING	50	Total duration of activities performed on the lead
trueai_first_touch	First Touch	DATETIME		Date when the lead was first touched
trueai_industry	Industry	STRING	50	Lead's standardized industry
trueai_industry_conf	Industry Confidence	FLOAT		Lead's standardized industry prediction confidence
trueai_industry_rule	Industry Rule	INTEGER		Lead's standardized industry prediction rule
trueai_is_disqualified	Is Disqualified	STRING	50	Lead's standardized disqualification status
trueai_is_disqualified_conf	Is Disqualified Confidence	FLOAT		Lead's standardized disqualification status prediction confidence
trueai_is_master	Is Master	BOOLEAN		Boolean flag that indicates whether the lead is the master lead in its group of duplicates
trueai_last_outcome	Last Outcome	STRING	50	Leads close date
trueai_last_touch	Last Touch	DATETIME		Date when the lead was last touched

Leads

field_name	display_name	data_type	length	description
trueai_lead_dupe_conf	Lead Duplicate Confidence	FLOAT		Lead's lead duplication confidence
trueai_lead_dupe_id	Lead Duplicate ID	STRING	50	Lead's lead duplication id
trueai_leadsource	Lead Source	STRING	50	Lead's standardized lead source
trueai_leadsource_conf	Lead Source Confidence	FLOAT		Lead's standardized lead source prediction confidence
trueai_leadsource_is_inbound	Lead Source Is Inbound	BOOLEAN		Boolean flag that indicates whether the lead's standardized lead source is inbound
trueai_leadsource_rule	Lead Source Rule	INTEGER		Lead's standardized lead source prediction rule
trueai_owner_id	Owner ID	STRING	50	Lead owner's id
trueai_probability_of_conversion	Probability of Conversion	FLOAT		Lead's probability of conversion
trueai_probability_of_conversion_explained_neg	Probability of Conversion Explained Negative	OBJECT	2000	Factors impacting the probability of conversion in a negative way
trueai_probability_of_conversion_explained_pos	Probability of Conversion Explained Positive	OBJECT	2000	Factors impacting the probability of conversion in a positive way
trueai_probability_of_new_logo_win	Probability of New Logo Win	FLOAT		Lead's probability of new logo win
trueai_qual_bucket	Quality Bucket	STRING	50	Quality bucket based on the probability of conversion
trueai_qual_bucket_num	Quality Bucket Num	INTEGER		Quality bucket expressed as an integer from 1 to 5 based on the probability of conversion

Leads field_name	display_name	data_type	length	description
trueai_ssr_is_master	SSR Is Master	BOOLEAN		Boolean flag that indicates whether the lead is the master lead in its group of duplicates, for leads it corresponds to the trueai_is_master flag
trueai_last_outcome	Last Outcome	STRING	50	Leads close date
trueai_last_touch	Last Touch	DATETIME		Date when the lead was last touched
trueai_lead_dupe_conf	Lead Duplicate Confidence	FLOAT		Lead's lead duplication confidence
trueai_lead_dupe_id	Lead Duplicate ID	STRING	50	Lead's lead duplication id
trueai_leadsource	Lead Source	STRING	50	Lead's standardized lead source
trueai_leadsource_conf	Lead Source Confidence	FLOAT		Lead's standardized lead source prediction confidence
trueai_leadsource_is_inbound	Lead Source Is Inbound	BOOLEAN		Boolean flag that indicates whether the lead's standardized lead source is inbound
trueai_leadsource_rule	Lead Source Rule	INTEGER		Lead's standardized lead source prediction rule
trueai_owner_id	Owner ID	STRING	50	Lead owner's id
trueai_probability_of_conversion	Probability of Conversion	FLOAT		Lead's probability of conversion
trueai_probability_of_conversion_explained_neg	Probability of Conversion Explained Negative	OBJECT	2000	Factors impacting the probability of conversion in a negative way
trueai_probability_of_conversion_explained_pos	Probability of Conversion Explained Positive	OBJECT	2000	Factors impacting the probability of conversion in a positive way

Leads field_name	display_name	data_type	length	description
trueai_probability_of_new_logo_win	Probability of New Logo Win	FLOAT		Lead's probability of new logo win
trueai_qual_bucket	Quality Bucket	STRING	50	Quality bucket based on the probability of conversion
trueai_qual_bucket_num	Quality Bucket Num	INTEGER		Quality bucket expressed as an integer from 1 to 5 based on the probability of conversion
trueai_ssr_is_master	SSR Is Master	BOOLEAN		Boolean flag that indicates whether the lead is the master lead in its group of duplicates, for leads it corresponds to the trueai_is_master flag
trueai_title_dept	Title Department	STRING	50	Lead's standardized department
trueai_title_dept_conf	Title Department Confidence	FLOAT		Lead's standardized department prediction confidence
trueai_title_seniority	Title Seniority	STRING	50	Lead's standardized seniority
trueai_title_seniority_conf	Title Seniority Confidence	FLOAT		Lead's standardized seniority prediction confidence
trueai_vi_leadgen_value	Lead Generation Value	FLOAT		Lead's lead gen value

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accounts

The CRM account entity with additional TrueAI fields.

Accounts field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_filt_end_date	Filter End Date	DATE		The end date of the record, stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The start date of the record, stripped of time
_sys_last_modifiedon	Last Modified On	DATETIME		The date of the last data modification in the platform
_sys_ssr_id	SSR ID	STRING	50	Id of the SSR document the record belongs to
crm_account_type	CRM Account Type	STRING	50	Account's type in the CRM
crm_addr_city	CRM Address City	STRING	150	Account's city in the CRM
crm_addr_country	CRM Address Country	STRING	150	Account's country in the CRM
crm_addr_postal_code	CRM Address Postal Code	STRING	150	Account's postal code in the CRM
crm_addr_state	CRM Address State	STRING	150	Account's state in the CRM
crm_addr_street	CRM Address Street	STRING	150	Account's street in the CRM
crm_complt	CRM Completeness	FLOAT		Account's completeness score based on the CRM data

Accounts

field_name	display_name	data_type	length	description
crm_complt_contact	CRM Completeness Contact	FLOAT		Account's contact information completeness score based on the CRM data
crm_complt_contact_method	CRM Completeness Contact Method	FLOAT		Account's contact method completeness score based on the CRM data
crm_complt_geo	CRM Completeness Geo	FLOAT		Account's location completeness score based on the CRM data
crm_complt_marketing	CRM Completeness Marketing	FLOAT		Account's marketing completeness score based on the CRM data
crm_createdon	CRM Created On	DATETIME		Account creation date in the CRM
crm_creator_id	CRM Creator ID	STRING	50	Account creator's id in the CRM
crm_custom_value_1	CRM Custom Value 1	STRING	150	Custom categorical variable
crm_custom_value_2	CRM Custom Value 2	STRING	150	Custom categorical variable
crm_custom_value_3	CRM Custom Value 3	STRING	150	Custom categorical variable
crm_deep_link	CRM Deep Link	STRING	500	Link to the account in the remote system (such as Salesforce)
crm_industry	CRM Industry	STRING	150	Account's industry in the CRM
crm_last_act_time	CRM Last Activity Time	DATETIME		Account's last activity time in the CRM
crm_leadsource	CRM Lead Source	STRING	150	Account's lead source in the CRM

Accounts field_name	display_name	data_type	length	description
crm_modifiedon	CRM Modified On	DATETIME		Account modified on date in the CRM
crm_name	CRM Name	STRING	500	Name of the account
crm_num_employees	CRM Num Employees	INTEGER		Account's number of employees in the CRM
crm_owner_id	CRM Owner ID	STRING	50	Account owner's id in the CRM
crm_parent_id	CRM Parent ID	STRING	50	Account's parent id in the CRM
crm_weburl	CRM Weburl	STRING	150	Account's URL in the CRM
trueai_account_dupe_conf	Account Duplicate Confidence	FLOAT		Account's duplication confidence
trueai_account_dupe_id	Account Duplicate ID	STRING	150	Account's duplication id
trueai_addr_city	Address City	STRING	50	Account's city
trueai_addr_country	Address Country	STRING	50	Account's country
trueai_addr_lat	Address Lat	FLOAT		Account's latitude
trueai_addr_long	Address Long	FLOAT		Account's longitude
trueai_addr_postal_code	Address Postal Code	STRING	50	Account's postal code
trueai_addr_rule	Address Rule	INTEGER		Account's address prediction rule
trueai_addr_state	Address State	STRING	50	Account's state
trueai_addr_street	Address Street	STRING	50	Account's street
trueai_company_size	Company Size	STRING	50	Account's standardized company size

Accounts

field_name	display_name	data_type	length	description
trueai_company_size_rule	Company Size Rule	INTEGER		Account's standardized company size prediction rule
trueai_complt	Completeness	FLOAT		Completeness score of the account based on the standardized data
trueai_complt_contact	Completeness Contact	FLOAT		Contact information completeness score of the account based on the standardized data
trueai_complt_contact_method	Completeness Contact Method	FLOAT		Contact method completeness score of the account based on the standardized data
trueai_complt_geo	Completeness Geo	FLOAT		Location completeness score of the account based on the standardized data
trueai_complt_marketing	Completeness Marketing	FLOAT		Marketing completeness score of the account based on the standardized data
trueai_converted_date	Converted Date	DATETIME		Account's converted date
trueai_createdon	Created On	DATETIME		Account creation date
trueai_creator_id	Creator ID	STRING	50	Account creator's id
trueai_dur	Duration	FLOAT		Total duration of activities performed on the account
trueai_first_touch	First Touch	DATETIME		Date when the account was first touched
trueai_industry	Industry	STRING	50	Account's standardized industry
trueai_industry_conf	Industry Confidence	FLOAT		Account's standardized industry prediction confidence
trueai_industry_rule	Industry Rule	INTEGER		Account's standardized industry prediction rule
trueai_is_master	Is Master	BOOLEAN		Boolean flag that indicates whether the account is the master account in its group of duplicates

Accounts

field_name	display_name	data_type	length	description
trueai_last_outcome	Last Outcome	DATETIME		Account's close date
trueai_last_touch	Last Touch	DATETIME		Date when the account was last touched
trueai_leadsource	Lead Source	STRING	50	Account's standardized lead source
trueai_leadsource_conf	Lead Source Confidence	FLOAT		Account's standardized lead source prediction confidence
trueai_leadsource_rule	Lead Source Rule	INTEGER		Account's standardized lead source prediction rule
trueai_owner_id	Owner ID	STRING	50	Account owner's id
trueai_probability_of_conversion	Probability of Conversion	FLOAT		Account's probability of conversion
trueai_probability_of_conversion_explained_neg	Probability of Conversion Explained Negative	OBJECT	2000	Factors impacting the probability of conversion in a negative way
trueai_probability_of_conversion_explained_pos	Probability of Conversion Explained Positive	OBJECT	2000	Factors impacting the probability of conversion in a positive way
trueai_probability_of_new_logo_win	Probability of New Logo Win	FLOAT		Account's probability of new logo win
trueai_qual_bucket	Quality Bucket	STRING	50	Quality bucket based on the probability of conversion
trueai_qual_bucket_num	Quality Bucket Num	INTEGER		Quality bucket expressed as an integer from 1 to 5 based on the probability of conversion
trueai_ssr_is_master	SSR Is Master	BOOLEAN		Boolean flag that indicates whether the account is the master account in its group of duplicates taking into account whether it has revenue
trueai_title_dept	Title Department	STRING	50	Account's standardized department

Accounts

field_name	display_name	data_type	length	description
trueai_title_dept_conf	Title Department Confidence	FLOAT		Account's standardized department prediction confidence
trueai_title_seniority	Title Seniority	STRING	50	Account's standardized seniority
trueai_title_seniority_conf	Title Seniority Confidence	FLOAT		Account's standardized seniority prediction confidence
trueai_vi_leadgen_value	Lead Generation Value	FLOAT		Account's lead gen value

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contacts

The CRM contact entity with additional TrueAI fields.

contacts field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_filt_end_date	Filter End Date	DATE		The end date of the record, stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The start date of the record, stripped of time
_sys_last_modifiedon	Last Modified On	DATETIME		The date of the last data modification in the platform
_sys_ssr_id	SSR ID	STRING	50	Id of the SSR document the record belongs to
crm_account_id	CRM Account ID	STRING	50	CRM account id of the contact
crm_addr_city	CRM Address City	STRING	150	Contact's city in the CRM
crm_addr_country	CRM Address Country	STRING	150	Contact's country in the CRM
crm_addr_postal_code	CRM Address Postal Code	STRING	150	Contact's postal code in the CRM
crm_addr_state	CRM Address State	STRING	150	Contact's state in the CRM
crm_addr_street	CRM Address Street	STRING	150	Contact's street in the CRM
crm_complt	CRM Completeness	FLOAT		Contact's completeness score based on the CRM data

contacts field_name	display_name	data_type	length	description
crm_complt_contact	CRM Completeness Contact	FLOAT		Contact's contact information completeness score based on the CRM data
crm_complt_contact_method	CRM Completeness Contact Method	FLOAT		Contact's contact method completeness score based on the CRM data
crm_complt_geo	CRM Completeness Geo	FLOAT		Contact's location completeness score based on the CRM data
crm_complt_marketing	CRM Completeness Marketing	FLOAT		Contact's marketing completeness score based on the CRM data
crm_createdon	CRM Created On	DATETIME		Contact creation date in the CRM
crm_creator_id	CRM Creator ID	STRING	50	Contact creator's id in the CRM
crm_deep_link	CRM Deep Link	STRING	500	Link to the contact in the remote system (such as Salesforce)
crm_email	CRM Email	STRING	150	Contact's email
crm_first_name	CRM First Name	STRING	150	Contact's first name
crm_last_act_time	CRM Last Activity Time	DATETIME		Contact's last activity time in the CRM
crm_last_name	CRM Last Name	STRING	150	Contact's last name
crm_leadsource	CRM Lead Source	STRING	150	Contact's lead source in the CRM
crm_modifiedon	CRM Modified On	DATETIME		Contact modified on date in the CRM
crm_owner_id	CRM Owner ID	STRING	50	Contact owner's id in the CRM

contacts

field_name	display_name	data_type	length	description
crm_phone	CRM Phone	STRING	150	Contact's phone number
crm_salutation	CRM Salutation	STRING	150	Contact's salutation in the CRM
crm_title	CRM Title	STRING	150	Contact's title in the CRM
trueai_act_count	Activities Count	INTEGER		Number of activities performed during the step
trueai_act_eng_count	Activities Engaged Count	INTEGER		Number of engaged activities performed during the step
trueai_addr_city	Address City	STRING	50	Contact's city
trueai_addr_country	Address Country	STRING	50	Contact's country
trueai_addr_lat	Address Lat	FLOAT		Contact's latitude
trueai_addr_long	Address Long	FLOAT		Contact's longitude
trueai_addr_postal_code	Address Postal Code	STRING	50	Contact's postal code
trueai_addr_rule	Address Rule	INTEGER		Contact's address prediction rule
trueai_addr_state	Address State	STRING	50	Contact's state
trueai_addr_street	Address Street	STRING	50	Contact's street
trueai_auto_email_count	Automated Email Count	INTEGER		Number of automated emails performed during the step
trueai_call_count	Call Count	INTEGER		Number of calls performed during the step
trueai_complt	Completeness	FLOAT		Completeness score of the contact based on the standardized data
trueai_complt_contact	Completeness Contact	FLOAT		Contact information completeness score of the contact based on the standardized data

contacts

field_name	display_name	data_type	length	description
trueai_complt_contact_method	Completeness Contact Method	FLOAT		Contact method completeness score of the contact based on the standardized data
trueai_complt_geo	Completeness Geo	FLOAT		Location completeness score of the contact based on the standardized data
trueai_complt_marketing	Completeness Marketing	FLOAT		Marketing completeness score of the contact based on the standardized data
trueai_createdon	Created On	DATE		Contact creation date
trueai_creator_id	Creator ID	STRING	50	Contact creator's id
trueai_dur	Duration	FLOAT		Duration of activities performed of the step during the step
trueai_email_count	Email Count	INTEGER		Number of emails performed during the step
trueai_first_act	First Activities	DATETIME		Date when the first activity was performed during the step
trueai_first_engmt	First Engagement	DATETIME		Date when the first engaged activity was performed during the step
trueai_last_act	Last Activity	DATETIME		Date when the last activity was performed during the step
trueai_last_engmt	Last Engagement	DATETIME		Date when the last engaged activity was performed during the step
trueai_leadsource	Lead Source	STRING	50	Contact's standardized lead source
trueai_leadsource_conf	Lead Source Confidence	FLOAT		Contact's standardized lead source prediction confidence
trueai_leadsource_rule	Lead Source Rule	INTEGER		Contact's standardized lead source prediction rule
trueai_meeting_count	Meeting Count	INTEGER		Number of meetings performed during the step

contacts

field_name	display_name	data_type	length	description
trueai_nd_count	Non Determinable Count	INTEGER		Number of activities with unknown type performed during the step
trueai_no_interaction_count	No Interaction Count	INTEGER		Number of activities with no customer interaction performed during the step
trueai_owner_id	Owner ID	STRING	50	Contact owner's id
trueai_social_media_count	Social Media Count	INTEGER		Number of social media activities performed during the step
trueai_title_dept	Title Department	STRING	50	Contact's standardized department
trueai_title_dept_conf	Title Department Confidence	FLOAT		Contact's standardized department prediction confidence
trueai_title_seniority	Title Seniority	STRING	50	Contact's standardized seniority
trueai_title_seniority_conf	Title Seniority Confidence	FLOAT		Contact's standardized seniority prediction confidence

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opps

The CRM opportunity entity with additional TrueAI fields.

opps field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_filt_end_date	Filter End Date	DATE		The end date of the record, stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The start date of the record, stripped of time
_sys_last_modifiedon	Last Modified On	DATETIME		The date of the last data modification in the platform
_sys_ssr_id	SSR ID	STRING	50	Id of the SSR document the record belongs to
crm_account_custom_value_1	CRM Account Custom Value 1	STRING	150	Custom categorical variable on the account
crm_account_custom_value_2	CRM Account Custom Value 2	STRING	150	Custom categorical variable on the account
crm_account_custom_value_3	CRM Account Custom Value 3	STRING	150	Custom categorical variable on the account
crm_account_id	CRM Account ID	STRING	50	CRM account id of the opportunity
crm_booking_amt	CRM Booking Amount	FLOAT		Opportunity's booking amount in the CRM
crm_close_date	CRM Close Date	DATETIME		Opportunity's close date in the CRM
crm_complt	CRM Completeness	FLOAT		Opportunity's completeness score based on the CRM data

opps

field_name	display_name	data_type	length	description
crm_complt_contact	CRM Completeness Contact	FLOAT		Opportunity's contact information completeness score based on the CRM data
crm_complt_marketing	CRM Completeness Marketing	FLOAT		Opportunity's marketing completeness score based on the CRM data
crm_createdon	CRM Created On	DATETIME		Opportunity creation date in the CRM
crm_creator_id	CRM Creator ID	STRING	50	Opportunity creator's id in the CRM
crm_currency	CRM Currency	STRING	50	Opportunity's currency in the CRM
crm_custom_value_1	CRM Custom Value 1	STRING	150	Custom categorical variable
crm_custom_value_2	CRM Custom Value 2	STRING	150	Custom categorical variable
crm_custom_value_3	CRM Custom Value 3	STRING	150	Custom categorical variable
crm_deep_link	CRM Deep Link	STRING	500	Link to the opportunity in the remote system (such as Salesforce)
crm_isclosed	CRM Is Closed	BOOLEAN		Boolean flag that indicates whether the opportunity is closed in the CRM
crm_iswon	CRM Is Won	BOOLEAN		Boolean flag that indicates whether the opportunity is won in the CRM
crm_last_act_time	CRM Last Activity Time	DATETIME		Opportunity's last activity time in the CRM
crm_leadsource	CRM Lead Source	STRING	150	Opportunity's lead source in the CRM
crm_modifiedon	CRM Modified On	DATETIME		Opportunity modified on date in the CRM

opps

field_name	display_name	data_type	length	description
crm_name	CRM Name	STRING	500	Name of the opportunity
crm_owner_id	CRM Owner ID	STRING	50	Opportunity owner's id in the CRM
crm_stage_name	CRM Stage Name	STRING	150	Opportunity's stage name in the CRM
crm_stage_num	CRM Stage Num	INTEGER	150	Opportunity's stage number in the CRM
crm_type	CRM Type	STRING	150	Opportunity's type in the CRM
trueai_addr_city	Address City	STRING	50	Opportunity's city
trueai_addr_country	Address Country	STRING	50	Opportunity's country
trueai_addr_lat	Address Lat	FLOAT		Opportunity's latitude
trueai_addr_long	Address Long	FLOAT		Opportunity's longitude
trueai_addr_postal_code	Address Postal Code	STRING	50	Opportunity's postal code
trueai_addr_rule	Address Rule	INTEGER		Opportunity's address prediction rule
trueai_addr_state	Address State	STRING	50	Opportunity's state
trueai_addr_street	Address Street	STRING	50	Opportunity's street
trueai_booking_amt	Booking Amount	FLOAT		Opportunity's booking amount
trueai_booking_amt_rule	Booking Amount Rule	INTEGER		Opportunity's booking amount prediction rule
trueai_close_date	Close Date	DATETIME		Opportunity's close date
trueai_company_size	Company Size	STRING	50	Opportunity's standardized company size
trueai_company_size_rule	Company Size Rule	INTEGER		Opportunity's standardized company size prediction rule

opps

field_name	display_name	data_type	length	description
trueai_complt	Completeness	FLOAT		Completeness score of the opportunity based on the standardized data
trueai_complt_contact	Completeness Contact	FLOAT		Contact information completeness score of the opportunity based on the standardized data
trueai_complt_marketing	Completeness Marketing	FLOAT		Marketing completeness score of the opportunity based on the standardized data
trueai_createdfrom_entity	Created from Entity	STRING	50	Opportunity's prospecting entity
trueai_createdfrom_id	Created from ID	STRING	50	Opportunity's prospecting object's id
trueai_createdon	Created On	DATETIME		Opportunity creation date
trueai_creator_id	Creator ID	STRING	50	Opportunity creator's id
trueai_discount	Discount	FLOAT		Percentage change of the opportunity's booking amount from middle stage to closed stage
trueai_dur	Duration	FLOAT		Total duration of activities performed on the opportunity
trueai_industry	Industry	STRING	50	Opportunity's standardized industry
trueai_industry_conf	Industry Confidence	FLOAT		Opportunity's standardized industry prediction confidence
trueai_industry_rule	Industry Rule	INTEGER		Opportunity's standardized industry prediction rule
trueai_is_new_logo	Is New Logo	BOOLEAN		Boolean flag that indicates whether the opportunity is a new logo
trueai_iswon	Is Won	BOOLEAN		Boolean flag that indicates whether the opportunity is won
trueai_leadsource	Lead Source	STRING	50	Opportunity's standardized lead source
trueai_leadsource_conf	Lead Source Confidence	FLOAT		Opportunity's standardized lead source prediction confidence

opps

field_name	display_name	data_type	length	description
trueai_leadsource_rule	Lead Source Rule	INTEGER		Opportunity's standardized lead source prediction rule
trueai_normalized_stage	Normalized Stage	STRING	50	Opportunity's normalized stage
trueai_opp_stage_late_date	Opp Stage Late Date	DATETIME		Date when the opportunity entered the late stage
trueai_opp_stage_mid_date	Opp Stage Mid Date	DATETIME		Date when the opportunity entered the middle stage
trueai_owner_id	Owner ID	STRING	50	Opportunity owner's id
trueai_pred_booking_amt	Predicted Booking Amount	FLOAT		Opportunity's predicted booking amount
trueai_probability_of_next_opp	Probability of Next Opp	FLOAT		Probability of next opportunity creation
trueai_probability_of_next_opp_explained_neg	Probability of Next Opp Explained Negative	OBJECT	2000	Factors impacting the probability of next opportunity creation in a negative way
trueai_probability_of_next_opp_explained_pos	Probability of Next Opp Explained Positive	OBJECT	2000	Factors impacting the probability of next opportunity creation in a positive way
trueai_probability_of_win	Probability of Win	FLOAT		Probability of win
trueai_probability_of_win_explained_neg	Probability of Win Explained Negative	OBJECT	2000	Factors impacting the probability of win in a negative way
trueai_probability_of_win_explained_pos	Probability of Win Explained Positive	OBJECT	2000	Factors impacting the probability of win in a positive way
trueai_qual_bucket	Quality Bucket	STRING	50	Quality bucket based on the probability of win

opps

field_name	display_name	data_type	length	description
trueai_qual_bucket_num	Quality Bucket Num	INTEGER		Quality bucket expressed as an integer from 1 to 5 based on the probability of win
trueai_sale_type	Sale Type	STRING	50	Opportunity's sale type
trueai_sale_type_conf	Sale Type Confidence	FLOAT		Opportunity's sale type prediction confidence
trueai_vi_opp_value	Opp Value	FLOAT		Opportunity's value
trueai_vi_post_sales_value	Post Sales Value	FLOAT		Opportunity's post-sales support value
trueai_vi_prospecting_value	Prospecting Value	FLOAT		Opportunity's prospecting value
trueai_vi_repeat_value	Repeat Value	FLOAT		Opportunity's repeat account value

opps_histories

The CRM opportunity history entity with additional TrueAI fields.

opps_histories field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the opp in the remote system (such as Salesforce ID) and date
_sys_filt_end_date	Filter End Date	DATE		The end date of the record, stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The start date of the record, stripped of time
crm_booking_amt	CRM Booking Amount	FLOAT		Opportunity's booking amount in the CRM
crm_close_date	CRM Close Date	DATETIME		Opportunity's close date in the CRM
crm_createdon	CRM Created On	DATETIME		Opportunity's creation date in the CRM
crm_creator_id	CRM Creator ID	STRING	50	Opportunity's creator's id in the CRM
crm_opp_id	CRM Opp ID	STRING	50	Opportunity's id in the CRM
crm_stage_name	CRM Stage Name	STRING	50	Opportunity's stage name in the CRM
crm_stage_num	CRM Stage Num	STRING	50	Opportunity's stage number in the CRM
trueai_booking_amt	Booking Amount	FLOAT		Opportunity's booking amount
trueai_can_be_excluded	Can Be Excluded	BOOLEAN		Boolean flag that indicates whether the record is redundant

opps_histories field_name	display_name	data_type	length	description
trueai_current_probability_of_win	Current Probability of Win	FLOAT		Current probability of win of the opportunity
trueai_isclosed	Is Closed	BOOLEAN		Boolean flag that indicates whether the opportunity is closed
trueai_iswon	Is Won	BOOLEAN		Boolean flag that indicates whether the opportunity is won
trueai_normalized_stage	Normalized Stage	STRING	50	Opportunity's normalized stage
trueai_step_sequence	Step Sequence	INTEGER		Ordinal number based on the position of the step in the sequence

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opps_line_items

The CRM opportunity line items entity.

opp_line_items field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_isdeleted	Is Deleted	BOOLEAN		Boolean flag that indicates whether the stage was set to deleted in the remote system
_sys_last_modifiedon	Last Modified On	DATETIME		The date of the last data modification in the platform
_sys_ssr_id	SSR ID	STRING	50	Id of the SSR document the record belongs to
crm_createdon	CRM Created On	DATETIME		Product's creation date in the CRM
crm_currency	CRM Currency	STRING	50	Product's currency in the CRM
crm_description	CRM Description	MEMO	5000	Product's description in the CRM
crm_list_price	CRM List Price	FLOAT		Product's list_price in the CRM
crm_modifiedon	CRM Modified On	DATETIME		Product's modified on date in the CRM
crm_name	CRM Name	STRING	500	Product name in the CRM
crm_opp_id	CRM Opp ID	STRING	500	Product oppid in the CRM
crm_product_code	CRM Product Code	STRING	2000	Product code in the CRM
crm_product_id	CRM Product ID	STRING	500	Product product_id in the CRM
crm_qty	CRM Qty	INTEGER		Product's qty in the CRM

opp_line_items field_name	display_name	data_type	length	description
crm_total_price	CRM Total Price	FLOAT		Product's total_price in the CRM
crm_unit_price	CRM Unit Price	FLOAT		Product's unit_price in the CRM
trueai_total_price	Total Price	FLOAT		Product's total price
trueai_total_price_rule	Total Price Rule	INTEGER		Product's total price rule

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opps_stages

The CRM opportunity history entity with additional TrueAI fields.

opps_stages field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_isdeleted	Is Deleted	BOOLEAN		Boolean flag that indicates whether the stage was set to deleted in the remote system
_sys_last_modifiedon	Last Modified On	DATETIME		The date of the last data modification in the platform
crm_createdon	CRM Created On	DATETIME		Stage's creation date in the CRM
crm_creator_id	CRM Creator ID	STRING	50	Stage's creator's id in the CRM
crm_description	CRM Description	STRING	2000	Stage description in the CRM
crm_isactive	CRM Is Active	BOOLEAN		Boolean flag that indicates whether the stage was set to inactive in CRM
crm_isclosed	CRM Is Closed	BOOLEAN		Boolean flag that indicates whether the stage is closed in the CRM
crm_iswon	CRM Is Won	BOOLEAN		Boolean flag that indicates whether the opportunity is won in the CRM
crm_modifiedby_id	CRM Modified By ID	STRING	50	Stage's modified by user id in the CRM
crm_modifiedon	CRM Modified On	DATETIME		Stage's modified on date in the CRM

crm_name	CRM Name	STRING	500	Stage name in the CRM
crm_order	CRM Order	FLOAT		Stage's order number in the CRM
crm_probability	CRM Probability	FLOAT		Stage's probability of win in the CRM

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products

The master list of used products.

products field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_isactive	Is Active	BOOLEAN		Boolean flag that indicates whether the record was set to inactive in the remote system
_sys_isdeleted	Is Deleted	BOOLEAN		Boolean flag that indicates whether the record was set to deleted in the remote system
_sys_last_modifiedon	Last Modified On	DATETIME		The date of the last data modification in the platform
crm_createdon	CRM Created On	DATETIME		Product's creation date in the CRM
crm_currency	CRM Currency	STRING	50	Product's currency in the CRM
crm_description	CRM Description	MEMO	5000	Product's description in the CRM
crm_family	CRM Family	STRING	50	Product's family in the CRM
crm_modifiedon	CRM Modified On	DATETIME		Product's modified on date in the CRM
crm_name	CRM Name	STRING	500	Product name in the CRM
crm_product_code	CRM Product Code	STRING	2000	Product code in the CRM

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activities

The CRM opportunity history entity with additional TrueAI fields.

activities field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_filt_end_date	Filter End Date	DATE		The end date of the record, stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The start date of the record, stripped of time
_sys_last_modifiedon	Last Modified On	DATETIME		The date of the last data modification in the platform
_sys_ssr_id	SSR ID	STRING	50	Id of the SSR document the record belongs to
crm_account_id	CRM Account ID	STRING	50	Activity's account id in the CRM
crm_contact_id	CRM Contact ID	STRING	150	Activity's contact id in the CRM
crm_createdon	CRM Created On	DATETIME		Activity creation date in the CRM
crm_creator_id	CRM Creator ID	STRING	50	Activity creator's id in the CRM
crm_description	CRM Description	MEMO	5000	Activity's description in the CRM
crm_dur	CRM Duration	FLOAT		Activity's duration in the CRM
crm_end	CRM End	DATETIME		Activity's end date in the CRM
crm_lead_id	CRM Lead ID	STRING	50	Activity's lead id in the CRM

activities

field_name	display_name	data_type	length	description
crm_modifiedby	CRM Modified By	STRING	50	Activity's modified by user id in the CRM
crm_modifiedon	CRM Modified On	DATETIME		Activity's modified on date in the CRM
crm_name	CRM Name	STRING	500	Activity's name in the CRM
crm_opp_id	CRM Opp ID	STRING	50	Activity's opp id in the CRM
crm_owner_id	CRM Owner ID	STRING	50	Activity owner's id in the CRM
crm_performed_on	CRM Performed on	DATETIME		Activity's performed on date in the CRM
crm_start	CRM Start	DATETIME		Activity's start date in the CRM
crm_subject	CRM Subject	STRING	500	Activity's subject in the CRM
crm_subtype	CRM Subtype	STRING	50	Activity's subtype in the CRM
crm_what_type	CRM What Type	STRING	50	Activity's what type in the CRM
crm_who_type	CRM Who Type	STRING	50	Activity's who type in the CRM
trueai_dur	Duration	FLOAT		Activity's duration
trueai_elapsed_time	Elapsed Time	FLOAT		Time passed between the previous activity and the current activity
trueai_eng	Engaged	STRING	50	Activity engagement prediction
trueai_eng_conf	Engaged Confidence	FLOAT		Activity engagement prediction confidence
trueai_interaction_purpose	Interaction Purpose	STRING	50	Activity purpose prediction

activities

field_name	display_name	data_type	length	description
trueai_interaction_type	Interaction Type	STRING	50	Activity type prediction
trueai_interaction_type_conf	Interaction Type Confidence	FLOAT		Activity type prediction confidence
trueai_performed_on	Performed on	DATETIME		Activity's performed on date
trueai_relatedto_entity	Related to Entity	STRING	50	Entity of the object the activity is primarily related to
trueai_relatedto_id	Related to ID	STRING	50	Id of the object the activity is primarily related to

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users

The CRM opportunity history entity with additional TrueAI fields.

users field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_co_id	Company ID	STRING	50	The Cien company ID
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_filt_end_date	Filter End Date	DATE		The end date of the record, stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The start date of the record, stripped of time
_sys_last_modifiedon	Last Modified On	DATETIME		The date of the last data modification in the platform
crm_addr_city	CRM Address City	STRING	150	User's city in the CRM
crm_addr_country	CRM Address Country	STRING	150	User's country in the CRM
crm_addr_postal_code	CRM Address Postal Code	STRING	150	User's postal code in the CRM
crm_addr_state	CRM Address State	STRING	150	User's state in the CRM
crm_addr_street	CRM Address Street	STRING	150	User's street in the CRM
crm_createdon	CRM Created On	DATETIME		User creation date in the CRM
crm_creator_id	CRM Creator ID	STRING	50	User creator's id in the CRM

users field_name	display_name	data_type	length	description
crm_department	CRM Department	STRING	50	User's department in the CRM
crm_division	CRM Division	STRING	50	User's division in the CRM
crm_email	CRM Email	STRING	150	User's email
crm_first_name	CRM First Name	STRING	50	User's first name
crm_language_locale	CRM Language Locale	STRING	50	User's language locale
crm_last_login_time	CRM Last Login Time	DATETIME		User's last login time in the CRM
crm_last_name	CRM Last Name	STRING	50	User's last name
crm_locale	CRM Locale	STRING	50	User's locale
crm_manager_id	CRM Manager ID	STRING	50	User manager's id in the CRM
crm_profile_url	CRM Profile URL	STRING	50	User's avatar URL
crm_role	CRM Role	STRING	50	User's CRM role
crm_time_zone	CRM Time Zone	STRING	50	User's time zone
crm_title	CRM Title	STRING	150	User's CRM title
crm_user_type	CRM User Type	STRING	50	User's CRM type
crm_username	CRM Username	STRING	150	User's username
trueai_addr_city	Address City	STRING	50	Lead's city

users

field_name	display_name	data_type	length	description
trueai_addr_country	Address Country	STRING	50	Lead's country
trueai_addr_lat	Address Lat	FLOAT		Lead's latitude
trueai_addr_long	Address Long	FLOAT		Lead's longitude
trueai_addr_postal_code	Address Postal Code	STRING	50	Lead's postal code
trueai_addr_state	Address State	STRING	50	Lead's state
trueai_addr_street	Address Street	STRING	50	Lead's street
trueai_billable	Billable	BOOLEAN		Boolean flag that indicates whether the user is billable
trueai_direct_reports	Direct Reports	INTEGER		User's number of direct reports
trueai_ext_match_id	Ext Match ID	STRING	50	User ID in the externel HR file
trueai_ext_match_rule	Ext Match Rule	INTEGER		Rule used to determine user's match with an external HR file
trueai_group	Group	STRING	50	User's group
trueai_group_conf	Group Confidence	FLOAT		User's group prediction confidence
trueai_group_rule	Group Rule	INTEGER		Rule used to determine user's group
trueai_hire_date	Hire Date	DATETIME		User's hire date
trueai_is_manager	Is Manager	BOOLEAN		Boolean flag that indicates whether the user is a manager
trueai_manager_id	Manager ID	STRING	50	User manager's id
trueai_manager_id_conf	Manager ID Confidence	FLOAT		User's manager's id prediction confidence

users

field_name	display_name	data_type	length	description
trueai_manager_id_rule	Manager ID Rule	INTEGER		Rule used to determine user's manager's id
trueai_manager_ids	Manager Ids	OBJECT	2000	User managers' ids
trueai_notes_given_count	Notes Given Count	INTEGER		Number of notes the user gave in the period
trueai_notes_received_count	Notes Received Count	INTEGER		Number of notes the user received in the period
trueai_notes_received_last_date	Notes Received Last Date	DATETIME		Date of the last note the user received
trueai_performance_lvl_reached_on	Performance Level Reached on	DATETIME		First date when the user reached the performance tier of "Performer" or "Overperformer"
trueai_role	Role	STRING	50	User's standardized role
trueai_role_conf	Role Confidence	FLOAT		User's standardized role prediction confidence
trueai_tenure	Tenure	INTEGER		Number of months since the user's hire date
trueai_termination_date	Termination Date	DATETIME		User's termination date
trueai_title	Title	STRING	50	User's standardized title
trueai_title_conf	Title Confidence	FLOAT		User's standardized title prediction confidence
trueai_tot_reports	Total Reports	INTEGER		User's number of total reports
trueai_user_behavior	User Behavior	STRING	50	User's standardized behavior
trueai_user_behavior_conf	User Behavior Confidence	FLOAT		User's standardized behavior prediction confidence

users

field_name	display_name	data_type	length	description
trueai_user_role	Standardized Role	STRING	50	User's standardized and combined role
trueai_user_role_dept	Standardized Role Department	STRING	50	User's department derived from the standardized and combined role
trueai_user_role_function	Standardized Role Function	STRING	50	User's function derived from the standardized and combined role

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users_history

A derived entity that represents a single month of a specific user (except for users with "Other User" role).
Typically created retroactively for up to 5 years and grouped into:

- User for user info
- DI for Deal Intelligence
- CI for Coaching Intelligence
- ADE for Automatic Data Enhancement metrics
- Activities

users_history field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The last date of the month that the record applies to (for past months) or the last date of aggregated data (for the present month)
_sys_co_id	Company ID	STRING	50	The Cien company ID
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID) and date
_sys_filt_end_date	Filter End Date	DATE		The last date of the month that the record applies to (for past months) or the last date of aggregated data (for the present month), stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The first date of the month that the records applies to, stripped of time
_sys_isactive	Is Active	BOOLEAN		Boolean flag that indicates whether the record was set to inactive in the remote system
_sys_isdeleted	Is Deleted	BOOLEAN		Boolean flag that indicates whether the record was set to deleted in the remote system
_sys_user_id	User ID	STRING	50	The ID of the document in the remote system (such as Salesforce ID)
act_auto_email_count	Activities Automated Email Count	INTEGER		Number of automated emails performed by the user in the period
act_auto_email_eng_count	Activities Automated	INTEGER		Number of engaged automated emails performed by the user in the period

users_history field_name	display_name	data_type	length	description
	Email Engaged Count			
act_auto_email_eng_unique_ids	Activities Automated Email Engaged Unique Ids	INTEGER		Number of unique objects that engaged automated emails were performed on by the user in the period
act_auto_email_new_logo_count	Activities Automated Email New Logo Count	INTEGER		Number of new logo selling automated emails performed by the user in the period
act_auto_email_new_logo_eng_count	Activities Automated Email New Logo Engaged Count	INTEGER		Number of engaged automated emails performed by the user in the period
act_auto_email_post_sales_count	Activities Automated Email Post Sales Count	INTEGER		Number of post-sales support automated emails performed by the user in the period
act_auto_email_post_sales_eng_count	Activities Automated Email Post Sales Engaged Count	INTEGER		Number of engaged automated emails performed by the user in the period
act_auto_email_prospecting_count	Activities Automated Email Prospecting Count	INTEGER		Number of prospecting automated emails performed by the user in the period
act_auto_email_prospecting_eng_count	Activities Automated Email Prospecting Engaged Count	INTEGER		Number of engaged automated emails performed by the user in the period

users_history field_name	display_name	data_type	length	description
act_auto_email_unique_ids	Activities Automated Email Unique Ids	INTEGER		Number of unique objects that automated emails were performed on by the user in the period
act_auto_email_upselling_count	Activities Automated Email Upselling Count	INTEGER		Number of upselling automated emails performed by the user in the period
act_auto_email_upselling_eng_count	Activities Automated Email Upselling Engaged Count	INTEGER		Number of engaged automated emails performed by the user in the period
act_call_count	Activities Call Count	INTEGER		Number of calls performed by the user in the period
act_call_eng_count	Activities Call Engaged Count	INTEGER		Number of engaged calls performed by the user in the period
act_call_eng_unique_ids	Activities Call Engaged Unique Ids	INTEGER		Number of unique objects that engaged calls were performed on by the user in the period
act_call_new_logo_count	Activities Call New Logo Count	INTEGER		Number of new logo selling calls performed by the user in the period
act_call_new_logo_eng_count	Activities Call New Logo Engaged Count	INTEGER		Number of engaged calls performed by the user in the period
act_call_post_sales_count	Activities Call Post Sales Count	INTEGER		Number of post-sales support calls performed by the user in the period
act_call_post_sales_eng_count	Activities Call Post Sales	INTEGER		Number of engaged calls performed by the user in the period

users_history field_name	display_name	data_type	length	description
	Engaged Count			
act_call_prospecting_count	Activities Call Prospecting Count	INTEGER		Number of prospecting calls performed by the user in the period
act_call_prospecting_eng_count	Activities Call Prospecting Engaged Count	INTEGER		Number of engaged calls performed by the user in the period
act_call_unique_ids	Activities Call Unique Ids	INTEGER		Number of unique objects that calls were performed on by the user in the period
act_call_upselling_count	Activities Call Upselling Count	INTEGER		Number of upselling calls performed by the user in the period
act_call_upselling_eng_count	Activities Call Upselling Engaged Count	INTEGER		Number of engaged calls performed by the user in the period
act_email_count	Activities Email Count	INTEGER		Number of emails performed by the user in the period
act_email_eng_count	Activities Email Engaged Count	INTEGER		Number of engaged emails performed by the user in the period
act_email_eng_unique_ids	Activities Email Engaged Unique Ids	INTEGER		Number of unique objects that engaged emails were performed on by the user in the period
act_email_new_logo_count	Activities Email New Logo Count	INTEGER		Number of new logo selling emails performed by the user in the period
act_email_new_logo_eng_count	Activities Email New Logo	INTEGER		Number of engaged emails performed by the user in the period

users_history field_name	display_name	data_type	length	description
	Engaged Count			
act_email_post_sales_count	Activities Email Post Sales Count	INTEGER		Number of post-sales support emails performed by the user in the period
act_email_post_sales_eng_count	Activities Email Post Sales Engaged Count	INTEGER		Number of engaged emails performed by the user in the period
act_email_prospecting_count	Activities Email Prospecting Count	INTEGER		Number of prospecting emails performed by the user in the period
act_email_prospecting_eng_count	Activities Email Prospecting Engaged Count	INTEGER		Number of engaged emails performed by the user in the period
act_email_unique_ids	Activities Email Unique Ids	INTEGER		Number of unique objects that emails were performed on by the user in the period
act_email_upselling_count	Activities Email Upselling Count	INTEGER		Number of upselling emails performed by the user in the period
act_email_upselling_eng_count	Activities Email Upselling Engaged Count	INTEGER		Number of engaged emails performed by the user in the period
act_eng_count	Activities Engaged Count	INTEGER		Number of engaged activities performed by the user in the period

users_history field_name	display_name	data_type	length	description
act_eng_dur	Activities Engaged Duration	FLOAT		Sum of duration of activities performed by the user in the period
act_eng_nd_count	Activities Engaged Non Determinable Count	INTEGER		Number of activities with unknown engagement performed by the user in the period
act_eng_unique_ids	Activities Engaged Unique Ids	INTEGER		Number of unique objects that activities were performed on by the user in the period
act_internal_count	Activities Internal Count	INTEGER		Number of internal activities performed by the user in the period
act_internal_dur	Activities Internal Duration	FLOAT		Sum of duration of internal activities performed by the user in the period
act_internal_eng_count	Activities Internal Engaged Count	INTEGER		Number of engaged internal activities performed by the user in the period
act_internal_eng_dur	Activities Internal Engaged Duration	FLOAT		Sum of duration of engaged internal activities performed by the user in the period
act_internal_eng_unique_ids	Activities Internal Engaged Unique Ids	INTEGER		Number of unique objects that engaged internal activities were performed on by the user in the period
act_internal_unique_ids	Activities Internal Unique Ids	INTEGER		Number of unique objects that internal activities were performed on by the user in the period
act_meeting_count	Activities Meeting Count	INTEGER		Number of meetings performed by the user in the period

users_history field_name	display_name	data_type	length	description
act_meeting_eng_count	Activities Meeting Engaged Count	INTEGER		Number of engaged meetings performed by the user in the period
act_meeting_eng_unique_ids	Activities Meeting Engaged Unique Ids	INTEGER		Number of unique objects that engaged meetings were performed on by the user in the period
act_meeting_new_logo_count	Activities Meeting New Logo Count	INTEGER		Number of new logo selling meetings performed by the user in the period
act_meeting_new_logo_eng_count	Activities Meeting New Logo Engaged Count	INTEGER		Number of engaged meetings performed by the user in the period
act_meeting_post_sales_count	Activities Meeting Post Sales Count	INTEGER		Number of post-sales support meetings performed by the user in the period
act_meeting_post_sales_eng_count	Activities Meeting Post Sales Engaged Count	INTEGER		Number of engaged meetings performed by the user in the period
act_meeting_prospecting_count	Activities Meeting Prospecting Count	INTEGER		Number of prospecting meetings performed by the user in the period
act_meeting_prospecting_eng_count	Activities Meeting Prospecting Engaged Count	INTEGER		Number of engaged meetings performed by the user in the period
act_meeting_unique_ids	Activities Meeting Unique Ids	INTEGER		Number of unique objects that meetings were performed on by the user in the period

users_history field_name	display_name	data_type	length	description
act_meeting_upselling_count	Activities Meeting Upselling Count	INTEGER		Number of upselling meetings performed by the user in the period
act_meeting_upselling_eng_count	Activities Meeting Upselling Engaged Count	INTEGER		Number of engaged meetings performed by the user in the period
act_nd_count	Activities Non Determinable Count	INTEGER		Number of activities with unknown type performed by the user in the period
act_nd_eng_count	Activities Non Determinable Engaged Count	INTEGER		Number of engaged activities with unknown type performed by the user in the period
act_nd_new_logo_count	Activities Non Determinable New Logo Count	INTEGER		Number of new logo selling activities with unknown type performed by the user in the period
act_nd_new_logo_eng_count	Activities Non Determinable New Logo Engaged Count	INTEGER		Number of engaged activities with unknown type performed by the user in the period
act_nd_post_sales_count	Activities Non Determinable Post Sales Count	INTEGER		Number of post-sales support activities with unknown type performed by the user in the period
act_nd_post_sales_eng_count	Activities Non Determinable Post Sales Engaged Count	INTEGER		Number of engaged activities performed by the user in the period
act_nd_prospecting_count	Activities Non Determinable Prospecting Count	INTEGER		Number of prospecting activities with unknown type performed by the user in the period

users_history field_name	display_name	data_type	length	description
act_nd_prospecting_eng_count	Activities Non Determinable Prospecting Engaged Count	INTEGER		Number of engaged activities with unknown type performed by the user in the period
act_nd_upselling_count	Activities Non Determinable Upselling Count	INTEGER		Number of upselling activities with unknown type performed by the user in the period
act_nd_upselling_eng_count	Activities Non Determinable Upselling Engaged Count	INTEGER		Number of engaged activities with unknown type performed by the user in the period
act_new_logo_count	Activities New Logo Count	INTEGER		Number of new logo selling activities performed by the user in the period
act_new_logo_dur	Activities New Logo Duration	FLOAT		Sum of duration of new logo selling activities performed by the user in the period
act_new_logo_eng_count	Activities New Logo Engaged Count	INTEGER		Number of engaged new logo selling activities performed by the user in the period
act_new_logo_eng_dur	Activities New Logo Engaged Duration	FLOAT		Sum of duration of engaged new logo selling activities performed by the user in the period
act_new_logo_eng_unique_ids	Activities New Logo Engaged Unique Ids	INTEGER		Number of unique objects that engaged new logo selling activities were performed on by the user in the period
act_new_logo_unique_ids	Activities New Logo Unique Ids	INTEGER		Number of unique objects that new logo selling activities were performed on by the user in the period

users_history field_name	display_name	data_type	length	description
act_no_interaction_count	Activities No Interaction Count	INTEGER		Number of activities with no customer interaction performed by the user in the period
act_no_interaction_eng_count	Activities No Interaction Engaged Count	INTEGER		Number of engaged activities with no customer interactions performed by the user in the period
act_no_interaction_new_logo_count	Activities No Interaction New Logo Count	INTEGER		Number of new logo selling activities with no customer interaction performed by the user in the period
act_no_interaction_new_logo_eng_count	Activities No Interaction New Logo Engaged Count	INTEGER		Number of engaged activities with no customer interaction performed by the user in the period
act_no_interaction_post_sales_count	Activities No Interaction Post Sales Count	INTEGER		Number of post-sales support activities with no customer interaction performed by the user in the period
act_no_interaction_post_sales_eng_count	Activities No Interaction Post Sales Engaged Count	INTEGER		Number of engaged activities with no customer interaction performed by the user in the period
act_no_interaction_prospecting_count	Activities No Interaction Prospecting Count	INTEGER		Number of prospecting activities with no customer interaction performed by the user in the period
act_no_interaction_prospecting_eng_count	Activities No Interaction Prospecting Engaged Count	INTEGER		Number of engaged activities with no customer interaction performed by the user in the period
act_no_interaction_upselling_count	Activities No Interaction Upselling Count	INTEGER		Number of upselling activities with no customer interaction performed by the user in the period

users_history field_name	display_name	data_type	length	description
act_no_interaction_upselling_eng_count	Activities No Interaction Upselling Engaged Count	INTEGER		Number of engaged activities with no customer interaction performed by the user in the period
act_post_sales_count	Activities Post Sales Count	INTEGER		Number of post-sales support activities performed by the user in the period
act_post_sales_dur	Activities Post Sales Duration	FLOAT		Sum of duration post-sales support of activities performed by the user in the period
act_post_sales_eng_count	Activities Post Sales Engaged Count	INTEGER		Number of engaged post-sales support activities performed by the user in the period
act_post_sales_eng_dur	Activities Post Sales Engaged Duration	FLOAT		Sum of duration of engaged post-sales support activities performed by the user in the period
act_post_sales_eng_unique_ids	Activities Post Sales Engaged Unique Ids	INTEGER		Number of unique objects that engaged post-sales support activities were performed on by the user in the period
act_post_sales_unique_ids	Activities Post Sales Unique Ids	INTEGER		Number of unique objects that post-sales support activities were performed on by the user in the period
act_prospecting_count	Activities Prospecting Count	INTEGER		Number of prospecting activities performed by the user in the period
act_prospecting_dur	Activities Prospecting Duration	FLOAT		Sum of duration of prospecting activities performed by the user in the period
act_prospecting_eng_count	Activities Prospecting Engaged Count	INTEGER		Number of engaged prospecting activities performed by the user in the period

users_history field_name	display_name	data_type	length	description
act_prospecting_eng_dur	Activities Prospecting Engaged Duration	FLOAT		Sum of duration of engaged prospecting activities performed by the user in the period
act_prospecting_eng_unique_ids	Activities Prospecting Engaged Unique Ids	INTEGER		Number of unique objects that engaged prospecting activities were performed on by the user in the period
act_prospecting_unique_ids	Activities Prospecting Unique Ids	INTEGER		Number of unique objects that prospecting activities were performed on by the user in the period
act_selling_count	Activities Selling Count	INTEGER		Number of activities performed by the user in the period
act_selling_eng_unique_ids	Activities Selling Engaged Unique Ids	INTEGER		Number of unique objects that engaged new logo selling and upselling activities were performed on by the user in the period
act_selling_unique_ids	Activities Selling Unique Ids	INTEGER		Number of unique objects that new logo selling and upselling activities were performed on by the user in the period
act_social_media_count	Activities Social Media Count	INTEGER		Number of social media activities performed by the user in the period
act_social_media_eng_count	Activities Social Media Engaged Count	INTEGER		Number of engaged social media activities performed by the user in the period
act_social_media_eng_unique_ids	Activities Social Media Engaged Unique Ids	INTEGER		Number of unique objects that engaged social media activities were performed on by the user in the period
act_social_media_new_logo_count	Activities Social Media New Logo Count	INTEGER		Number of new logo selling social media activities performed by the user in the period

users_history field_name	display_name	data_type	length	description
act_social_media_new_logo_eng_count	Activities Social Media New Logo Engaged Count	INTEGER		Number of engaged social media activities performed by the user in the period
act_social_media_post_sales_count	Activities Social Media Post Sales Count	INTEGER		Number of post-sales support social media activities performed by the user in the period
act_social_media_post_sales_eng_count	Activities Social Media Post Sales Engaged Count	INTEGER		Number of engaged social media activities performed by the user in the period
act_social_media_prospecting_count	Activities Social Media Prospecting Count	INTEGER		Number of prospecting social media activities performed by the user in the period
act_social_media_prospecting_eng_count	Activities Social Media Prospecting Engaged Count	INTEGER		Number of engaged social media activities performed by the user in the period
act_social_media_unique_ids	Activities Social Media Unique Ids	INTEGER		Number of unique objects that social media activities were performed on by the user in the period
act_social_media_upselling_count	Activities Social Media Upselling Count	INTEGER		Number of upselling social media activities performed by the user in the period
act_social_media_upselling_eng_count	Activities Social Media Upselling Engaged Count	INTEGER		Number of engaged social media activities performed by the user in the period
act_tot_count	Activities Total Count	INTEGER		Number of activities performed by the user in the period

users_history field_name	display_name	data_type	length	description
act_tot_dur	Activities Total Duration	FLOAT		Sum of duration of activities performed by the user in the period
act_tot_est_missed_count	Activities Total Est. Missed Count	INTEGER		Number of engaged activities performed by the user in the period
act_tot_est_total_incl_missed_count	Activities Total Est. Total Incl Missed Count	INTEGER		Number of engaged activities with unknown type performed by the user in the period
act_tot_unique_ids	Activities Total Unique Ids	INTEGER		Number of unique objects that activities were performed on by the user in the period
act_upselling_count	Activities Upselling Count	INTEGER		Number of upselling activities performed by the user in the period
act_upselling_dur	Activities Upselling Duration	FLOAT		Sum of duration of upselling activities performed by the user in the period
act_upselling_eng_count	Activities Upselling Engaged Count	INTEGER		Number of engaged upselling activities performed by the user in the period
act_upselling_eng_dur	Activities Upselling Engaged Duration	FLOAT		Sum of duration of engaged upselling activities performed by the user in the period
act_upselling_eng_unique_ids	Activities Upselling Engaged Unique Ids	INTEGER		Number of unique objects that engaged upselling activities were performed on by the user in the period
act_upselling_unique_ids	Activities Upselling Unique Ids	INTEGER		Number of unique objects that upselling activities were performed on by the user in the period

users_history field_name	display_name	data_type	length	description
ade_consistency_crm_countries	Consistency CRM Countries	INTEGER		Number of unique CRM countries
ade_consistency_crm_industries	Consistency CRM Industries	INTEGER		Number of unique CRM industries
ade_consistency_crm_leadsources	Consistency CRM Leadsources	INTEGER		Number of unique CRM leadsources
ade_consistency_crm_states	Consistency CRM States	INTEGER		Number of unique CRM states
ade_consistency_trueai_countries	Consistency Countries	INTEGER		Number of unique TrueAI countries
ade_consistency_trueai_industries	Consistency Industries	INTEGER		Number of unique TrueAI industries
ade_consistency_trueai_leadsources	Consistency Leadsources	INTEGER		Number of unique TrueAI leadsources
ade_consistency_trueai_states	Consistency States	INTEGER		Number of unique TrueAI states
ade_new_accounts	New Accounts	INTEGER		Number of accounts created in period owned by the user
ade_new_accounts_dupes	New Accounts Dupes	INTEGER		Number of accounts created in period owned by the user that have a duplicate
ade_new_accounts_dupes_nonmaster	New Accounts Dupes Non-master	INTEGER		Number of accounts created in period owned by the user that have a duplicate and are not the master accounts in their group of duplicates
ade_new_accounts_dupes_nonmaster_w_act	New Accounts Dupes Non-master with Activities	INTEGER		Number of accounts created in period owned by the user that have a duplicate and are not the master accounts in their group of duplicates but have activities linked to them

users_history field_name	display_name	data_type	length	description
ade_new_accounts_owned	New Accounts Owned	INTEGER		Number of accounts created in the period owned by the user
ade_new_accounts_owned_closed	New Accounts Owned Closed	INTEGER		Number of accounts created in the period owned by the user that reached the closed stage
ade_new_accounts_owned_selling	New Accounts Owned Selling	INTEGER		Number of accounts created in the period owned by the user that reached the selling stage
ade_new_accounts_owned_sumcomplt_closed	New Accounts Owned Sum of Completeness Closed	INTEGER		Sum of completeness score of the accounts created in the period owned by the user that reached the closed stage
ade_new_accounts_owned_sumcomplt_selling	New Accounts Owned Sum of Completeness Selling	INTEGER		Sum of completeness score of the accounts created in the period owned by the user that reached the selling stage
ade_new_accounts_sum_no_contacts	New Accounts Sum No Contacts	INTEGER		Sum of the number of contacts of accounts created in the period owned by the user
ade_new_hat_leads_owned	New Hat Leads Owned	INTEGER		Number of leads and accounts created in the period owned by the user
ade_new_hat_leads_owned_leadgen	New Hat Leads Owned Lead Generation	INTEGER		Number of leads and accounts created in the period owned by the user that reached the lead gen stage
ade_new_hat_leads_owned_prospecting	New Hat Leads Owned Prospecting	INTEGER		Number of leads and accounts created in the period owned by the user that reached the prospecting stage

users_history field_name	display_name	data_type	length	description
ade_new_hat_leads_owned_sumcomplt	New Hat Leads Owned Sum of Completeness	INTEGER		Sum of completeness score of the leads and accounts created in the period owned by the user
ade_new_hat_leads_owned_sumcomplt_contact	New Hat Leads Owned Sum of Completeness Contact	INTEGER		Sum of contact information completeness score of the leads and accounts created in the period owned by the user
ade_new_hat_leads_owned_sumcomplt_contact_method	New Hat Leads Owned Sum of Completeness Contact Method	INTEGER		Sum of contact method completeness score of the leads and accounts created in the period owned by the user
ade_new_hat_leads_owned_sumcomplt_geo	New Hat Leads Owned Sum of Completeness Geo	INTEGER		Sum of location completeness score of the leads and accounts created in the period owned by the user
ade_new_hat_leads_owned_sumcomplt_leadgen	New Hat Leads Owned Sum of Completeness Lead Generation	INTEGER		Sum of completeness score of the leads and accounts created in the period owned by the user that reached the lead gen stage
ade_new_hat_leads_owned_sumcomplt_marketing	New Hat Leads Owned Sum of Completeness Marketing	INTEGER		Sum of marketing completeness score of the leads and accounts created in the period owned by the user
ade_new_hat_leads_owned_sumcomplt_prospecting	New Hat Leads Owned Sum of Completeness Prospecting	INTEGER		Sum of completeness score of the leads and accounts created in the period owned by the user that reached the prospecting stage
ade_new_leads	New Leads	INTEGER		Number of leads created in period owned by the user

users_history field_name	display_name	data_type	length	description
ade_new_leads_dupes	New Leads Dupes	INTEGER		Number of leads created in period owned by the user that have a duplicate
ade_new_leads_dupes_nonmaster	New Leads Dupes Non-master	INTEGER		Number of leads created in period owned by the user that have a duplicate and are not the master leads in their group of duplicates
ade_new_leads_dupes_nonmaster_w_act	New Leads Dupes Non-master with Activities	INTEGER		Number of leads created in period owned by the user that have a duplicate and are not the master leads in their group of duplicates but have activities linked to them
ade_sales_process_account_prospecting	Sales Process Account Prospecting	FLOAT		Boolean flag that indicates whether or not prospecting most commonly occurs on accounts amongst the sales processes that ended in the period
ade_sales_process_account_prospecting_consistency	Sales Process Account Prospecting Consistency	FLOAT		Percentage of sales processes that ended in the period with prospecting entity matching the most common entity
ade_sales_process_analyzed	Sales Process Analyzed	INTEGER		Number of determinable sales process that ended in the period
ade_sales_process_avg_stages	Sales Process Avg. Stages	FLOAT		Average number of unique CRM stages per opportunity
ade_sales_process_avg_stages_won	Sales Process Avg. Stages Won	FLOAT		Average number of unique CRM stages per won opportunity
ade_sales_process_handoffs	Sales Process Handoffs	STRING	50	The most common handoff pattern amongst the sales processes that ended in the period
ade_sales_process_handoffs_consistency	Sales Process Handoffs Consistency	FLOAT		Percentage of sales processes with the most common handoff pattern that ended in the period
ade_sales_process_mgr_involved_percentage	Sales Process Mgr. Involved Percentage	FLOAT		Percentage of sales processes with manager involved that ended in the period

users_history field_name	display_name	data_type	length	description
ade_sales_process_others_involved_in_stage_percentage	Sales Process Others Involved In Stage Percentage	FLOAT		Percentage of sales processes with multiple reps involved that ended in the period
ade_sales_process_prospecting_end_r	Sales Process Prospecting End Rule	INTEGER		The most common rule used to determine the end of prospecting amongst the sales processes that ended in the period
ade_sales_process_prospecting_end_r_consistency	Sales Process Prospecting End Rule Consistency	FLOAT		Percentage of sales processes with the most common rule used to determine the end of prospecting that ended in the period
ade_sales_process_unique_stages	Sales Process Unique Stages	INTEGER		Number of unique CRM opportunity stages
ci_act_capt_lvl	Activities Capture Level	FLOAT		User's act_capture_level score in the period
ci_act_capt_lvl_conf	Activities Capture Level Confidence	FLOAT		User's act_capture_level score confidence in the period
ci_act_capt_lvl_pi_new_logo_expect_owner_dur	Activities Capture Level Peek Inside New Logo Expected Owner Duration	FLOAT		Expected duration of activities performed on new logo selling steps that completed in the period
ci_act_capt_lvl_pi_new_logo_expect_owner_dur_closed_lost	Activities Capture Level Peek Inside New Logo Expected Owner Duration Closed Lost	FLOAT		Expected duration of activities performed on lost new logo selling steps that completed in the period
ci_act_capt_lvl_pi_new_logo_expect_owner_dur_closed_won	Activities Capture Level Peek Inside	FLOAT		Expected duration of activities performed on won new logo selling steps that completed in the period

users_history field_name	display_name	data_type	length	description
	New Logo Expected Owner Duration Closed Won			
ci_act_capt_lvl_pi_new_logo_owner_act	Activities Capture Level Peek Inside New Logo Owner Activities	INTEGER		Number of owner activities performed on new logo selling steps that completed in the period
ci_act_capt_lvl_pi_new_logo_owner_act_closed_lost	Activities Capture Level Peek Inside New Logo Owner Activities Closed Lost	INTEGER		Number of owner activities performed on lost new logo selling steps that completed in the period
ci_act_capt_lvl_pi_new_logo_owner_act_closed_won	Activities Capture Level Peek Inside New Logo Owner Activities Closed Won	INTEGER		Number of owner activities performed on won new logo selling steps that completed in the period
ci_act_capt_lvl_pi_new_logo_owner_dur	Activities Capture Level Peek Inside New Logo Owner Duration	FLOAT		Duration of activities performed on new logo selling steps that completed in the period
ci_act_capt_lvl_pi_new_logo_owner_dur_closed_lost	Activities Capture Level Peek Inside New Logo Owner Duration Closed Lost	FLOAT		Duration of activities performed on lost new logo selling steps that completed in the period
ci_act_capt_lvl_pi_new_logo_owner_dur_closed_won	Activities Capture Level Peek Inside	FLOAT		Duration of activities performed on won new logo selling steps that completed in the period

users_history field_name	display_name	data_type	length	description
	New Logo Owner Duration Closed Won			
ci_act_capt_lvl_pi_new_logo_steps	Activities Capture Level Peek Inside New Logo Steps	INTEGER		Number of new logo selling steps that completed in the period
ci_act_capt_lvl_pi_new_logo_steps_closed_lost	Activities Capture Level Peek Inside New Logo Steps Closed Lost	INTEGER		Number of lost new logo selling steps that completed in the period
ci_act_capt_lvl_pi_new_logo_steps_closed_won	Activities Capture Level Peek Inside New Logo Steps Closed Won	INTEGER		Number of won new logo selling steps that completed in the period
ci_act_capt_lvl_pi_post_sales_expect_owner_dur	Activities Capture Level Peek Inside Post Sales Expected Owner Duration	FLOAT		Expected duration of activities performed on post-sales support steps that completed in the period
ci_act_capt_lvl_pi_post_sales_expect_owner_dur_churned	Activities Capture Level Peek Inside Post Sales Expected Owner Duration Churned	FLOAT		Expected duration of activities performed on churned post-sales support steps that completed in the period
ci_act_capt_lvl_pi_post_sales_expect_owner_dur_started_upsellin	Activities Capture Level Peek Inside Post Sales Expected	FLOAT		Expected duration of activities performed on post-sales support steps with an upsell opportunity created that completed in the period

users_history field_name	display_name	data_type	length	description
	Owner Duration Started Upsellin			
ci_act_capt_lvl_pi_post_sales_owner_act	Activities Capture Level Peek Inside Post Sales Owner Activities	INTEGER		Number of owner activities performed on post-sales support steps that completed in the period
ci_act_capt_lvl_pi_post_sales_owner_act_churned	Activities Capture Level Peek Inside Post Sales Owner Activities Churned	INTEGER		Number of owner activities performed on churned post-sales support steps that completed in the period
ci_act_capt_lvl_pi_post_sales_owner_act_started_upselling	Activities Capture Level Peek Inside Post Sales Owner Activities Started Upselling	INTEGER		Number of owner activities performed on post-sales support steps with an upsell opportunity created that completed in the period
ci_act_capt_lvl_pi_post_sales_owner_dur	Activities Capture Level Peek Inside Post Sales Owner Duration	FLOAT		Duration of activities performed on post-sales support steps that completed in the period
ci_act_capt_lvl_pi_post_sales_owner_dur_churned	Activities Capture Level Peek Inside Post Sales Owner Duration Churned	FLOAT		Duration of activities performed on churned post-sales support steps that completed in the period
ci_act_capt_lvl_pi_post_sales_owner_dur_started_upselling	Activities Capture Level Peek Inside	FLOAT		Duration of activities performed on post-sales support steps with an upsell opportunity created that completed in the period

users_history field_name	display_name	data_type	length	description
	Post Sales Owner Duration Started Upselling			
ci_act_capt_lvl_pi_post_sales_steps	Activities Capture Level Peek Inside Post Sales Steps	INTEGER		Number of post-sales support steps that completed in the period
ci_act_capt_lvl_pi_post_sales_steps_churned	Activities Capture Level Peek Inside Post Sales Steps Churned	INTEGER		Number of churned post-sales support steps that completed in the period
ci_act_capt_lvl_pi_post_sales_steps_started_upselling	Activities Capture Level Peek Inside Post Sales Steps Started Upselling	INTEGER		Number of post-sales support steps with an upsell opportunity created that completed in the period
ci_act_capt_lvl_pi_prospecting_expect_owner_dur	Activities Capture Level Peek Inside Prospecting Expected Owner Duration	FLOAT		Expected duration of activities performed on prospecting steps that completed in the period
ci_act_capt_lvl_pi_prospecting_expect_owner_dur_abandoned	Activities Capture Level Peek Inside Prospecting Expected Owner Duration Abandoned	FLOAT		Expected duration of activities performed on abandoned prospecting steps that completed in the period
ci_act_capt_lvl_pi_prospecting_expect_owner_dur_converted	Activities Capture Level Peek Inside Prospecting	FLOAT		Expected duration of activities performed on converted prospecting steps that completed in the period

users_history field_name	display_name	data_type	length	description
	Expected Owner Duration Converted			
ci_act_capt_lvl_pi_prospecting_expect_owner_dur_disqualified	Activities Capture Level Peek Inside Prospecting Expected Owner Duration Disqualified	FLOAT		Expected duration of activities performed on disqualified prospecting steps that completed in the period
ci_act_capt_lvl_pi_prospecting_owner_act	Activities Capture Level Peek Inside Prospecting Owner Activities	INTEGER		Number of owner activities performed on prospecting steps that completed in the period
ci_act_capt_lvl_pi_prospecting_owner_act_abandoned	Activities Capture Level Peek Inside Prospecting Owner Activities Abandoned	INTEGER		Number of owner activities performed on abandoned prospecting steps that completed in the period
ci_act_capt_lvl_pi_prospecting_owner_act_converted	Activities Capture Level Peek Inside Prospecting Owner Activities Converted	INTEGER		Number of owner activities performed on converted prospecting steps that completed in the period
ci_act_capt_lvl_pi_prospecting_owner_act_disqualified	Activities Capture Level Peek Inside Prospecting Owner Activities Disqualified	INTEGER		Number of owner activities performed on disqualified prospecting steps that completed in the period

users_history field_name	display_name	data_type	length	description
ci_act_capt_lvl_pi_prospecting_owner_dur	Activities Capture Level Peek Inside Prospecting Owner Duration	FLOAT		Duration of activities performed on prospecting steps that completed in the period
ci_act_capt_lvl_pi_prospecting_owner_dur_abandoned	Activities Capture Level Peek Inside Prospecting Owner Duration Abandoned	FLOAT		Duration of activities performed on abandoned prospecting steps that completed in the period
ci_act_capt_lvl_pi_prospecting_owner_dur_converted	Activities Capture Level Peek Inside Prospecting Owner Duration Converted	FLOAT		Duration of activities performed on converted prospecting steps that completed in the period
ci_act_capt_lvl_pi_prospecting_owner_dur_disqualified	Activities Capture Level Peek Inside Prospecting Owner Duration Disqualified	FLOAT		Duration of activities performed on disqualified prospecting steps that completed in the period
ci_act_capt_lvl_pi_prospecting_steps	Activities Capture Level Peek Inside Prospecting Steps	INTEGER		Number of prospecting steps that completed in the period
ci_act_capt_lvl_pi_prospecting_steps_abandoned	Activities Capture Level Peek Inside Prospecting Steps Abandoned	INTEGER		Number of abandoned prospecting steps that completed in the period
ci_act_capt_lvl_pi_prospecting_steps_converted	Activities Capture Level Peek Inside	INTEGER		Number of converted prospecting steps that completed in the period

users_history field_name	display_name	data_type	length	description
	Prospecting Steps Converted			
ci_act_capt_lvl_pi_prospecting_steps_disqualified	Activities Capture Level Peek Inside Prospecting Steps Disqualified	INTEGER		Number of disqualified prospecting steps that completed in the period
ci_act_capt_lvl_pi_timeliness	Activities Capture Level Peek Inside Timeliness	FLOAT		User's timeliness score in the period
ci_act_capt_lvl_pi_tot_expect_owner_dur	Activities Capture Level Peek Inside Total Expected Owner Duration	FLOAT		Expected duration of activities performed on steps that completed in the period
ci_act_capt_lvl_pi_tot_owner_act	Activities Capture Level Peek Inside Total Owner Activities	INTEGER		Number of owner activities performed on steps that completed in the period
ci_act_capt_lvl_pi_tot_owner_dur	Activities Capture Level Peek Inside Total Owner Duration	FLOAT		Duration of activities performed on steps that completed in the period
ci_act_capt_lvl_pi_tot_steps	Activities Capture Level Peek Inside Total Steps	INTEGER		Number of steps that completed in the period
ci_act_capt_lvl_pi_upselling_expect_owner_dur	Activities Capture Level Peek Inside Upselling Expected	FLOAT		Expected duration of activities performed on upselling steps that completed in the period

users_history field_name	display_name	data_type	length	description
	Owner Duration			
ci_act_capt_lvl_pi_upselling_expect_owner_dur_closed_lost	Activities Capture Level Peek Inside Upselling Expected Owner Duration Closed Lost	FLOAT		Expected duration of activities performed on lost upselling steps that completed in the period
ci_act_capt_lvl_pi_upselling_expect_owner_dur_closed_won	Activities Capture Level Peek Inside Upselling Expected Owner Duration Closed Won	FLOAT		Expected duration of activities performed on won upselling steps that completed in the period
ci_act_capt_lvl_pi_upselling_owner_act	Activities Capture Level Peek Inside Upselling Owner Activities	INTEGER		Number of owner activities performed on upselling steps that completed in the period
ci_act_capt_lvl_pi_upselling_owner_act_closed_lost	Activities Capture Level Peek Inside Upselling Owner Activities Closed Lost	INTEGER		Number of owner activities performed on lost upselling steps that completed in the period
ci_act_capt_lvl_pi_upselling_owner_act_closed_won	Activities Capture Level Peek Inside Upselling Owner Activities Closed Won	INTEGER		Number of owner activities performed on won upselling steps that completed in the period
ci_act_capt_lvl_pi_upselling_owner_dur	Activities Capture Level Peek Inside	FLOAT		Duration of activities performed on upselling steps that completed in the period

users_history field_name	display_name	data_type	length	description
	Upselling Owner Duration			
ci_act_capt_lvl_pi_upselling_owner_dur_closed_lost	Activities Capture Level Peek Inside Upselling Owner Duration Closed Lost	FLOAT		Duration of activities performed on lost upselling steps that completed in the period
ci_act_capt_lvl_pi_upselling_owner_dur_closed_won	Activities Capture Level Peek Inside Upselling Owner Duration Closed Won	FLOAT		Duration of activities performed on won upselling steps that completed in the period
ci_act_capt_lvl_pi_upselling_steps	Activities Capture Level Peek Inside Upselling Steps	INTEGER		Number of upselling steps that completed in the period
ci_act_capt_lvl_pi_upselling_steps_closed_lost	Activities Capture Level Peek Inside Upselling Steps Closed Lost	INTEGER		Number of lost upselling steps that completed in the period
ci_act_capt_lvl_pi_upselling_steps_closed_won	Activities Capture Level Peek Inside Upselling Steps Closed Won	INTEGER		Number of won upselling steps that completed in the period
ci_act_capt_lvl_raw	Activities Capture Level Raw	FLOAT		User's raw act_capture_level score in the period
ci_average_conf	Average Confidence	FLOAT		This field has been deprecated.

users_history field_name	display_name	data_type	length	description
ci_closing_ability	Closing Ability	FLOAT		This field has been deprecated.
ci_closing_ability_conf	Closing Ability Confidence	FLOAT		This field has been deprecated.
ci_closing_ability_pi_opps_closed_count	Closing Ability Peek Inside Opps Closed Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_opps_closed_mid_late_count	Closing Ability Peek Inside Opps Closed Mid Late Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_opps_lost_count	Closing Ability Peek Inside Opps Lost Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_opps_lost_mid_late_count	Closing Ability Peek Inside Opps Lost Mid Late Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_opps_lost_new_logos_count	Closing Ability Peek Inside Opps Lost New Logos Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_opps_lost_p2_init	Closing Ability Peek Inside Opps Lost Initial Opp Win Probability	FLOAT		This field has been deprecated.
ci_closing_ability_pi_opps_lost_upsells_count	Closing Ability Peek Inside Opps Lost Upsells Count	INTEGER		This field has been deprecated.

users_history field_name	display_name	data_type	length	description
ci_closing_ability_pi_opps_won_count	Closing Ability Peek Inside Opps Won Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_opps_won_mid_late_count	Closing Ability Peek Inside Opps Won Mid Late Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_opps_won_new_logos_count	Closing Ability Peek Inside Opps Won New Logos Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_opps_won_p2_init	Closing Ability Peek Inside Opps Won Initial Opp Win Probability	FLOAT		This field has been deprecated.
ci_closing_ability_pi_opps_won_upsells_count	Closing Ability Peek Inside Opps Won Upsells Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_peer_opps_closed_count	Closing Ability Peek Inside Peer Opps Closed Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_peer_opps_closed_mid_late_count	Closing Ability Peek Inside Peer Opps Closed Mid Late Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_peer_opps_lost_count	Closing Ability Peek Inside Peer Opps Lost Count	INTEGER		This field has been deprecated.

users_history field_name	display_name	data_type	length	description
ci_closing_ability_pi_peer_opps_lost_mid_late_count	Closing Ability Peek Inside Peer Opps Lost Mid Late Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_peer_opps_lost_new_logos_count	Closing Ability Peek Inside Peer Opps Lost New Logos Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_peer_opps_lost_p2_init	Closing Ability Peek Inside Peer Opps Lost Initial Opp Win Probability	FLOAT		This field has been deprecated.
ci_closing_ability_pi_peer_opps_lost_upsells_count	Closing Ability Peek Inside Peer Opps Lost Upsells Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_peer_opps_won_count	Closing Ability Peek Inside Peer Opps Won Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_peer_opps_won_mid_late_count	Closing Ability Peek Inside Peer Opps Won Mid Late Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_peer_opps_won_new_logos_count	Closing Ability Peek Inside Peer Opps Won New Logos Count	INTEGER		This field has been deprecated.
ci_closing_ability_pi_peer_opps_won_p2_init	Closing Ability Peek Inside Peer Opps Won Initial	FLOAT		This field has been deprecated.

users_history field_name	display_name	data_type	length	description
	Opp Win Probability			
ci_closing_ability_pi_peer_opps_won_upsells_count	Closing Ability Peek Inside Peer Opps Won Upsells Count	INTEGER		This field has been deprecated.
ci_closing_ability_stats_is_applicable	Closing Ability Stats Is Applicable	BOOLEAN		This field has been deprecated.
ci_closing_ability_stats_potential_value	Closing Ability Stats Potential Value	FLOAT		This field has been deprecated.
ci_closing_ability_stats_realized_value	Closing Ability Stats Realized Value	FLOAT		This field has been deprecated.
ci_deal_maximizing	Deal Maximizing	FLOAT		User's deal maximizing score score in the period
ci_deal_maximizing_conf	Deal Maximizing Confidence	FLOAT		User's deal maximizing score confidence in the period
ci_deal_maximizing_pi_opps_closed_amt	Deal Maximizing Peek Inside Opps Closed Amount	FLOAT		Sum of the booking amounts of opportunities closed by the user in the period
ci_deal_maximizing_pi_opps_closed_count	Deal Maximizing Peek Inside Opps Closed Count	INTEGER		Number of opportunities closed by the user in the period
ci_deal_maximizing_pi_opps_lost_count	Deal Maximizing Peek Inside	INTEGER		Number of opportunities lost by the user in the period

users_history field_name	display_name	data_type	length	description
	Opps Lost Count			
ci_deal_maximizing_pi_opps_won_amt	Deal Maximizing Peek Inside Opps Won Amount	FLOAT		Sum of the booking amounts of opportunities won by the user in the period
ci_deal_maximizing_pi_opps_won_count	Deal Maximizing Peek Inside Opps Won Count	INTEGER		Number of opportunities won by the user in the period
ci_deal_maximizing_pi_peer_opps_closed_amt	Deal Maximizing Peek Inside Peer Opps Closed Amount	FLOAT		Sum of the booking amounts of opportunities closed by the user's peers in the period
ci_deal_maximizing_pi_peer_opps_closed_count	Deal Maximizing Peek Inside Peer Opps Closed Count	INTEGER		Average number of opportunities closed by the user's peers in the period
ci_deal_maximizing_pi_peer_opps_lost_count	Deal Maximizing Peek Inside Peer Opps Lost Count	INTEGER		Average number of opportunities lost by the user's peers in the period
ci_deal_maximizing_pi_peer_opps_won_amt	Deal Maximizing Peek Inside Peer Opps Won Amount	FLOAT		Average sum of the booking amounts of opportunities won by the user's peers in the period
ci_deal_maximizing_pi_peer_opps_won_count	Deal Maximizing Peek Inside Peer Opps Won Count	INTEGER		Average number of opportunities won by the user's peers in the period

users_history field_name	display_name	data_type	length	description
ci_deal_maximizing_stats_is_applicable	Deal Maximizing Stats Is Applicable	BOOLEAN		Boolean flag that indicates whether the score is applicable to the user in the period, based on whether the user was active
ci_deal_maximizing_stats_potential_value	Deal Maximizing Stats Potential Value	FLOAT		Potential value that would be delivered by the user in the period if their score was at the peer average or higher, above 0 for users with scores below the peer average
ci_deal_maximizing_stats_realized_value	Deal Maximizing Stats Realized Value	FLOAT		Value realized by the user in the period by improving their score relative to the previous period, as a portion of the potential value
ci_discovery_skills	Discovery Skills	FLOAT		This field has been deprecated.
ci_discovery_skills_conf	Discovery Skills Confidence	FLOAT		This field has been deprecated.
ci_discovery_skills_pi_hat_leads_assigned_count	Discovery Skills Peek Inside Hat Leads Assigned Count	INTEGER		This field has been deprecated.
ci_discovery_skills_pi_hat_leads_closed_count	Discovery Skills Peek Inside Hat Leads Closed Count	INTEGER		This field has been deprecated.
ci_discovery_skills_pi_hat_leads_converted_count	Discovery Skills Peek Inside Hat Leads Converted Count	INTEGER		This field has been deprecated.
ci_discovery_skills_pi_opps_assigned_count	Discovery Skills Peek Inside Opps	INTEGER		This field has been deprecated.

users_history field_name	display_name	data_type	length	description
	Assigned Count			
ci_discovery_skills_pi_opps_lost_early_count	Discovery Skills Peek Inside Opps Lost Early Count	INTEGER		This field has been deprecated.
ci_discovery_skills_pi_opps_mid_late_count	Discovery Skills Peek Inside Opps Mid Late Count	INTEGER		This field has been deprecated.
ci_discovery_skills_pi_peer_hat_leads_assigned_count	Discovery Skills Peek Inside Peer Hat Leads Assigned Count	INTEGER		This field has been deprecated.
ci_discovery_skills_pi_peer_hat_leads_closed_count	Discovery Skills Peek Inside Peer Hat Leads Closed Count	INTEGER		This field has been deprecated.
ci_discovery_skills_pi_peer_hat_leads_converted_count	Discovery Skills Peek Inside Peer Hat Leads Converted Count	INTEGER		This field has been deprecated.
ci_discovery_skills_pi_peer_opps_assigned_count	Discovery Skills Peek Inside Peer Opps Assigned Count	INTEGER		This field has been deprecated.
ci_discovery_skills_pi_peer_opps_lost_early_count	Discovery Skills Peek Inside Peer	INTEGER		This field has been deprecated.

users_history field_name	display_name	data_type	length	description
	Opps Lost Early Count			
ci_discovery_skills_pi_peer_opps_mid_late_count	Discovery Skills Peek Inside Peer Opps Mid Late Count	INTEGER		This field has been deprecated.
ci_discovery_skills_pi_peer_tenure	Discovery Skills Peek Inside Peer Tenure	INTEGER		This field has been deprecated.
ci_discovery_skills_pi_tenure	Discovery Skills Peek Inside Tenure	INTEGER		This field has been deprecated.
ci_discovery_skills_stats_is_applicable	Discovery Skills Stats Is Applicable	BOOLEAN		This field has been deprecated.
ci_discovery_skills_stats_potential_value	Discovery Skills Stats Potential Value	FLOAT		This field has been deprecated.
ci_discovery_skills_stats_realized_value	Discovery Skills Stats Realized Value	FLOAT		This field has been deprecated.
ci_engmt_ability	Engagement Ability	FLOAT		User's engagement ability score in the period
ci_engmt_ability_closing	Engagement Ability Closing	FLOAT		User's engagement ability score base on selling activity in the period
ci_engmt_ability_closing_conf	Engagement Ability Closing Confidence	FLOAT		User's engagement ability score base on selling activity confidence in the period
ci_engmt_ability_conf	Engagement Ability Confidence	FLOAT		User's engagement ability score confidence in the period

users_history field_name	display_name	data_type	length	description
ci_engmt_ability_pi_acs_call_upselling_eng_count	Engagement Ability Peek Inside Acs Call Upselling Engaged Count	INTEGER		Number of engaged upselling calls performed by the user in the period
ci_engmt_ability_pi_act_call_new_logo_count	Engagement Ability Peek Inside Activities Call New Logo Count	INTEGER		Number of new logo selling calls performed by the user in the period
ci_engmt_ability_pi_act_call_new_logo_eng_count	Engagement Ability Peek Inside Activities Call New Logo Engaged Count	INTEGER		Number of engaged new logo selling calls performed by the user in the period
ci_engmt_ability_pi_act_call_prospecting_count	Engagement Ability Peek Inside Activities Call Prospecting Count	INTEGER		Number of prospecting calls performed by the user in the period
ci_engmt_ability_pi_act_call_prospecting_eng_count	Engagement Ability Peek Inside Activities Call Prospecting Engaged Count	INTEGER		Number of engaged prospecting calls performed by the user in the period
ci_engmt_ability_pi_act_call_upselling_count	Engagement Ability Peek Inside Activities Call Upselling Count	INTEGER		Number of upselling calls performed by the user in the period
ci_engmt_ability_pi_act_email_new_logo_count	Engagement Ability Peek Inside	INTEGER		Number of new logo selling emails performed by the user in the period

users_history field_name	display_name	data_type	length	description
	Activities Email New Logo Count			
ci_engmt_ability_pi_act_email_new_logo_eng_count	Engagement Ability Peek Inside Activities Email New Logo Engaged Count	INTEGER		Number of engaged new logo selling emails performed by the user in the period
ci_engmt_ability_pi_act_email_prospecting_count	Engagement Ability Peek Inside Activities Email Prospecting Count	INTEGER		Number of prospecting emails performed by the user in the period
ci_engmt_ability_pi_act_email_prospecting_eng_count	Engagement Ability Peek Inside Activities Email Prospecting Engaged Count	INTEGER		Number of engaged prospecting emails performed by the user in the period
ci_engmt_ability_pi_act_email_upselling_count	Engagement Ability Peek Inside Activities Email Upselling Count	INTEGER		Number of upselling emails performed by the user in the period
ci_engmt_ability_pi_act_email_upselling_eng_count	Engagement Ability Peek Inside Activities Email Upselling Engaged Count	INTEGER		Number of engaged upselling emails performed by the user in the period

users_history field_name	display_name	data_type	length	description
ci_engmt_ability_pi_act_eng_count	Engagement Ability Peek Inside Activities Engaged Count	INTEGER		Number of engaged activities performed by the user in the period
ci_engmt_ability_pi_act_internal_count	Engagement Ability Peek Inside Activities Internal Count	INTEGER		Number of internal activities performed by the user in the period
ci_engmt_ability_pi_act_meeting_new_logo_count	Engagement Ability Peek Inside Activities Meeting New Logo Count	INTEGER		Number of new logo selling meetings performed by the user in the period
ci_engmt_ability_pi_act_meeting_new_logo_eng_count	Engagement Ability Peek Inside Activities Meeting New Logo Engaged Count	INTEGER		Number of engaged new logo selling meetings performed by the user in the period
ci_engmt_ability_pi_act_meeting_prospecting_count	Engagement Ability Peek Inside Activities Meeting Prospecting Count	INTEGER		Number of prospecting meetings performed by the user in the period
ci_engmt_ability_pi_act_meeting_prospecting_eng_count	Engagement Ability Peek Inside Activities Meeting Prospecting Engaged Count	INTEGER		Number of engaged prospecting meetings performed by the user in the period

users_history field_name	display_name	data_type	length	description
ci_engmt_ability_pi_act_meeting_upselling_count	Engagement Ability Peek Inside Activities Meeting Upselling Count	INTEGER		Number of upselling meetings performed by the user in the period
ci_engmt_ability_pi_act_meeting_upselling_eng_count	Engagement Ability Peek Inside Activities Meeting Upselling Engaged Count	INTEGER		Number of engaged upselling meetings performed by the user in the period
ci_engmt_ability_pi_act_new_logo_count	Engagement Ability Peek Inside Activities New Logo Count	INTEGER		Number of new logo selling activities performed by the user in the period
ci_engmt_ability_pi_act_new_logo_eng_count	Engagement Ability Peek Inside Activities New Logo Engaged Count	INTEGER		Number of engaged new logo selling activities performed by the user in the period
ci_engmt_ability_pi_act_post_sales_support_count	Engagement Ability Peek Inside Activities Post Sales Support Count	INTEGER		Number of post-sales support activities performed by the user in the period
ci_engmt_ability_pi_act_post_sales_support_eng_count	Engagement Ability Peek Inside Activities Post Sales Support Engaged Count	INTEGER		Number of engaged post-sales support activities performed by the user in the period

users_history field_name	display_name	data_type	length	description
ci_engmt_ability_pi_act_prospecting_count	Engagement Ability Peek Inside Activities Prospecting Count	INTEGER		Number of prospecting activities performed by the user in the period
ci_engmt_ability_pi_act_prospecting_eng_count	Engagement Ability Peek Inside Activities Prospecting Engaged Count	INTEGER		Number of engaged prospecting activities performed by the user in the period
ci_engmt_ability_pi_act_social_media_new_logo_count	Engagement Ability Peek Inside Activities Social Media New Logo Count	INTEGER		Number of new logo selling social media activities performed by the user in the period
ci_engmt_ability_pi_act_social_media_new_logo_eng_count	Engagement Ability Peek Inside Activities Social Media New Logo Engaged Count	INTEGER		Number of engaged new logo selling social media activities performed by the user in the period
ci_engmt_ability_pi_act_social_media_prospecting_count	Engagement Ability Peek Inside Activities Social Media Prospecting Count	INTEGER		Number of prospecting social media activities performed by the user in the period
ci_engmt_ability_pi_act_social_media_prospecting_eng_count	Engagement Ability Peek Inside Activities Social Media Prospecting	INTEGER		Number of engaged prospecting social media activities performed by the user in the period

users_history field_name	display_name	data_type	length	description
	Engaged Count			
ci_engmt_ability_pi_act_social_media_upselling_count	Engagement Ability Peek Inside Activities Social Media Upselling Count	INTEGER		Number of upselling social media activities performed by the user in the period
ci_engmt_ability_pi_act_social_media_upselling_eng_count	Engagement Ability Peek Inside Activities Social Media Upselling Engaged Count	INTEGER		Number of engaged upselling social media activities performed by the user in the period
ci_engmt_ability_pi_act_tot_count	Engagement Ability Peek Inside Activities Total Count	INTEGER		Number of activities performed by the user in the period
ci_engmt_ability_pi_act_upselling_count	Engagement Ability Peek Inside Activities Upselling Count	INTEGER		Number of upselling activities performed by the user in the period
ci_engmt_ability_pi_act_upselling_eng_count	Engagement Ability Peek Inside Activities Upselling Engaged Count	INTEGER		Number of engaged upselling activities performed by the user in the period
ci_engmt_ability_pi_peer_act_call_new_logo_count	Engagement Ability Peek Inside Peer Activities Call New Logo Count	INTEGER		Average number of new logo selling calls performed by the user's peers in the period

users_history field_name	display_name	data_type	length	description
ci_engmt_ability_pi_peer_act_call_new_logo_eng_count	Engagement Ability Peek Inside Peer Activities Call New Logo Engaged Count	INTEGER		Average number of engaged new logo selling calls performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_call_prospecting_count	Engagement Ability Peek Inside Peer Activities Call Prospecting Count	INTEGER		Average number of prospecting calls performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_call_prospecting_eng_count	Engagement Ability Peek Inside Peer Activities Call Prospecting Engaged Count	INTEGER		Average number of engaged prospecting calls performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_call_upselling_count	Engagement Ability Peek Inside Peer Activities Call Upselling Count	INTEGER		Average number of upselling calls performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_call_upselling_eng_count	Engagement Ability Peek Inside Peer Activities Call Upselling Engaged Count	INTEGER		Average number of engaged upselling calls performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_email_new_logo_count	Engagement Ability Peek Inside Peer Activities Email New Logo Count	INTEGER		Average number of new logo selling emails performed by the user's peers in the period

users_history field_name	display_name	data_type	length	description
ci_engmt_ability_pi_peer_act_email_new_logo_eng_count	Engagement Ability Peek Inside Peer Activities Email New Logo Engaged Count	INTEGER		Average number of engaged new logo selling emails performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_email_prospecting_count	Engagement Ability Peek Inside Peer Activities Email Prospecting Count	INTEGER		Average number of prospecting emails performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_email_prospecting_eng_count	Engagement Ability Peek Inside Peer Activities Email Prospecting Engaged Count	INTEGER		Average number of engaged prospecting emails performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_email_upselling_count	Engagement Ability Peek Inside Peer Activities Email Upselling Count	INTEGER		Average number of upselling emails performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_email_upselling_eng_count	Engagement Ability Peek Inside Peer Activities Email Upselling Engaged Count	INTEGER		Average number of engaged upselling emails performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_eng_count	Engagement Ability Peek Inside Peer Activities	INTEGER		Average number of engaged activities performed by the user's peers in the period

users_history field_name	display_name	data_type	length	description
	Engaged Count			
ci_engmt_ability_pi_peer_act_internal_count	Engagement Ability Peek Inside Peer Activities Internal Count	INTEGER		Average number of internal activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_meeting_new_logo_count	Engagement Ability Peek Inside Peer Activities Meeting New Logo Count	INTEGER		Average number of new logo selling meetings performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_meeting_new_logo_eng_count	Engagement Ability Peek Inside Peer Activities Meeting New Logo Engaged Count	INTEGER		Average number of engaged new logo selling meetings performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_meeting_prospecting_count	Engagement Ability Peek Inside Peer Activities Meeting Prospecting Count	INTEGER		Average number of prospecting meetings performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_meeting_prospecting_eng_count	Engagement Ability Peek Inside Peer Activities Meeting Prospecting Engaged Count	INTEGER		Average number of engaged prospecting meetings performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_meeting_upselling_count	Engagement Ability Peek Inside Peer Activities	INTEGER		Average number of upselling meetings performed by the user's peers in the period

users_history field_name	display_name	data_type	length	description
	Meeting Upselling Count			
ci_engmt_ability_pi_peer_act_meeting_upselling_eng_count	Engagement Ability Peek Inside Peer Activities Meeting Upselling Engaged Count	INTEGER		Average number of engaged upselling meetings performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_new_logo_count	Engagement Ability Peek Inside Peer Activities New Logo Count	INTEGER		Average number of new logo selling activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_new_logo_eng_count	Engagement Ability Peek Inside Peer Activities New Logo Engaged Count	INTEGER		Average number of engaged new logo selling activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_post_sales_support_count	Engagement Ability Peek Inside Peer Activities Post Sales Support Count	INTEGER		Average number of post-sales support activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_post_sales_support_eng_count	Engagement Ability Peek Inside Peer Activities Post Sales Support Engaged Count	INTEGER		Average number of engaged post-sales support activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_prospecting_count	Engagement Ability Peek Inside Peer Activities	INTEGER		Average number of prospecting activities performed by the user's peers in the period

users_history field_name	display_name	data_type	length	description
	Prospecting Count			
ci_engmt_ability_pi_peer_act_prospecting_eng_count	Engagement Ability Peek Inside Peer Activities Prospecting Engaged Count	INTEGER		Average number of engaged prospecting activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_social_media_new_logo_count	Engagement Ability Peek Inside Peer Activities Social Media New Logo Count	INTEGER		Average number of new logo selling social media activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_social_media_new_logo_eng_count	Engagement Ability Peek Inside Peer Activities Social Media New Logo Engaged Count	INTEGER		Average number of engaged new logo selling social media activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_social_media_prospecting_count	Engagement Ability Peek Inside Peer Activities Social Media Prospecting Count	INTEGER		Average number of prospecting social media activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_social_media_prospecting_eng_count	Engagement Ability Peek Inside Peer Activities Social Media Prospecting Engaged Count	INTEGER		Average number of engaged prospecting social media activities performed by the user's peers in the period

users_history field_name	display_name	data_type	length	description
ci_engmt_ability_pi_peer_act_social_media_upselling_count	Engagement Ability Peek Inside Peer Activities Social Media Upselling Count	INTEGER		Average number of upselling social media activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_social_media_upselling_eng_count	Engagement Ability Peek Inside Peer Activities Social Media Upselling Engaged Count	INTEGER		Average number of engaged upselling social media activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_tot_count	Engagement Ability Peek Inside Peer Activities Total Count	INTEGER		Average number of activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_upselling_count	Engagement Ability Peek Inside Peer Activities Upselling Count	INTEGER		Average number of upselling activities performed by the user's peers in the period
ci_engmt_ability_pi_peer_act_upselling_eng_count	Engagement Ability Peek Inside Peer Activities Upselling Engaged Count	INTEGER		Average number of engaged upselling activities performed by the user's peers in the period
ci_engmt_ability_prospecting	Engagement Ability Prospecting	FLOAT		User's engagement ability score based on prospecting activity in the period
ci_engmt_ability_prospecting_conf	Engagement Ability Prospecting Confidence	FLOAT		User's engagement ability score based on prospecting activity confidence in the period

users_history field_name	display_name	data_type	length	description
ci_engmt_ability_stats_is_applicable	Engagement Ability Stats Is Applicable	BOOLEAN		Boolean flag that indicates whether the score is applicable to the user in the period, based on whether the user was active
ci_engmt_ability_stats_potential_value	Engagement Ability Stats Potential Value	FLOAT		Potential value that would be delivered by the user in the period if their score was at the peer average or higher, above 0 for users with scores below the peer average
ci_engmt_ability_stats_realized_value	Engagement Ability Stats Realized Value	FLOAT		Value realized by the user in the period by improving their score relative to the previous period, as a portion of the potential value
ci_perf_qtly_avg_bookings_peers	Perf Qtly Avg. Bookings Peers	FLOAT		Average quarterly sum of the booking amounts of opportunities won by the user's peers in the period
ci_perf_qtly_avg_pipeline_peers	Perf Qtly Avg. Pipeline Peers	FLOAT		Average quarterly sum of the booking amounts of opportunities created by the user's peers in the period
ci_perf_qtly_bookings_user	Perf Qtly Bookings User	FLOAT		Quarterly sum of the booking amounts of opportunities won by the user in the period
ci_perf_qtly_performance_tier	Perf Qtly Performance Tier	STRING	50	User's performance tier expressed as "underperformer", "overperformer" or "performer", based on their quarterly sum of booking amounts of won opportunities compared to their peers
ci_perf_qtly_performance_tier_num	Perf Qtly Performance Tier Num	INTEGER		User's performance tier expressed as an integer from 1 to 3, based on their quarterly sum of booking amounts of won opportunities compared to their peers
ci_perf_qtly_pipeline_user	Perf Qtly Pipeline User	FLOAT		Quarterly sum of the booking amounts of opportunities created by the user in the period
ci_perf_ramping_status	Perf Ramping Status	STRING	50	User's ramping status indicating whether the user's tenure is lower than 6 months
ci_sb_closing_ability	Sb Closing Ability	FLOAT		The final closing ability skills and behavoir score. Same as the smoothed and normalized ratio.

users_history field_name	display_name	data_type	length	description
ci_sb_closing_ability_actual_vs_predicted	Sb Closing Ability Actual Vs Predicted	FLOAT		The ratio between actual and predicted success rate. Over 1 indicates an over performance
ci_sb_closing_ability_actual_vs_predicted_norm	Sb Closing Ability Actual Vs Predicted Norm	FLOAT		The normalized value between 0.05-0.95 of comparing smoothed user values with the peers values. The avg represents 0.5
ci_sb_closing_ability_actual_vs_predicted_smooth	Sb Closing Ability Actual Vs Predicted Smooth	FLOAT		The ratio between actual and predicted success rate after smoothing progressively over 3 months. Over 1 indicates an over performance
ci_sb_closing_ability_conf	Sb Closing Ability Confidence	FLOAT		The confidence value based on actual samples vs. expected sample count (smoothed over 3 months). E.g. Needed 100 actual 50, would give 0.5
ci_sb_closing_ability_conf_expected_sample_count	Sb Closing Ability Confidence Expected Sample Count	INTEGER		The minimum sample count needed for a 100%% confidence value (smoothed over 3 months)
ci_sb_closing_ability_opps_closed_count	Sb Closing Ability Opps Closed Count	INTEGER		The total number of closed deals in the month
ci_sb_closing_ability_opps_closed_prob_sum	Sb Closing Ability Opps Closed Prob Sum	FLOAT		The sum of expected win rate of the closed deals (that then is divided by num of closed deal to get the avg. probability for deals won in that month)
ci_sb_closing_ability_opps_won_count	Sb Closing Ability Opps Won Count	INTEGER		The deals won in the month
ci_sb_closing_ability_peer_actual_vs_predicted	Sb Closing Ability Peer Actual Vs Predicted	FLOAT		The reference ratio between actual and predicted success rate for the peer group for the 12 months prior to the reference date

users_history field_name	display_name	data_type	length	description
ci_sb_closing_ability_peer_actual_vs_predicted_ratio_derived_max	Sb Closing Ability Peer Actual Vs Predicted Ratio Derived Max	FLOAT		The derived max of the ratio based on the reference date and 12 months back for the peer group
ci_sb_closing_ability_peer_actual_vs_predicted_ratio_derived_min	Sb Closing Ability Peer Actual Vs Predicted Ratio Derived Min	FLOAT		The derived min of the ratio based on the reference date and 12 months back for the peer group
ci_sb_closing_ability_peer_opps_closed_count	Sb Closing Ability Peer Opps Closed Count	FLOAT		The avg monthly number of closed deals for the peer group for the 12 months prior to the reference date
ci_sb_closing_ability_peer_opps_closed_prob	Sb Closing Ability Peer Opps Closed Prob	FLOAT		The avg sum of expected win rate of the closed deals for the peer group for the 12 months prior to the reference date
ci_sb_closing_ability_peer_opps_won_count	Sb Closing Ability Peer Opps Won Count	FLOAT		The avg deals won for the peer group for the 12 months prior to the reference date
ci_sb_discov_skills	Sb Discov Skills	FLOAT		The final discovery skills and behavoir score. Same as the smoothed and normalized ratio.
ci_sb_discov_skills_actual_vs_predicted	Sb Discov Skills Actual Vs Predicted	FLOAT		The ratio between actual and predicted success rate. Over 1 indicates an over performance
ci_sb_discov_skills_actual_vs_predicted_norm	Sb Discov Skills Actual Vs Predicted Norm	FLOAT		The normalized value between 0.05-0.95 of comparing smoothed user values with the peers values. The avg represents 0.5
ci_sb_discov_skills_actual_vs_predicted_smooth	Sb Discov Skills Actual Vs Predicted Smooth	FLOAT		The ratio between actual and predicted success rate after smoothing progressively over 3 months. Over 1 indicates an over performance

users_history field_name	display_name	data_type	length	description
ci_sb_discov_skills_conf	Sb Discov Skills Confidence	FLOAT		The confidence value based on actual samples vs. expected sample count (smoothed over 3 months). E.g. Needed 100 actual 50, would give 0.5
ci_sb_discov_skills_conf_expected_sample_count	Sb Discov Skills Confidence Expected Sample Count	INTEGER		The minimum sample count needed for a 100%% confidence value (smoothed over 3 months)
ci_sb_discov_skills_hatleads_closed_count	Sb Discov Skills Leads & Accounts Closed Count	INTEGER		The total number of closed leads and accounts in the month
ci_sb_discov_skills_hatleads_closed_prob_sum	Sb Discov Skills Leads & Accounts Closed Prob Sum	FLOAT		The sum of expected success rate of the closed leads and accounts (that then is divided by num of closed deal to get the avg. probability for deals won in that month)
ci_sb_discov_skills_hatleads_converted_count	Sb Discov Skills Leads & Accounts Converted Count	INTEGER		The leads and accounts converted in the month
ci_sb_discov_skills_peer_actual_vs_predicted	Sb Discov Skills Peer Actual Vs Predicted	FLOAT		The reference ratio between actual and predicted success rate for the peer group for the 12 months prior to the reference date
ci_sb_discov_skills_peer_actual_vs_predicted_ratio_max	Sb Discov Skills Peer Actual Vs Predicted Ratio Max	FLOAT		The derived max of the ratio based on the reference date and 12 months back for the peer group
ci_sb_discov_skills_peer_actual_vs_predicted_ratio_min	Sb Discov Skills Peer Actual Vs Predicted Ratio Min	FLOAT		The derived min of the ratio based on the reference date and 12 months back for the peer group

users_history field_name	display_name	data_type	length	description
ci_sb_discov_skills_peer_hatleads_closed_count	Sb Discov Skills Peer Leads & Accounts Closed Count	FLOAT		The total number of closed leads and accounts in the month
ci_sb_discov_skills_peer_hatleads_closed_prob_sum	Sb Discov Skills Peer Leads & Accounts Closed Prob Sum	FLOAT		The sum of expected success rate of the closed leads and accounts (that then is divided by num of closed deal to get the avg. probability for leads and accounts won in that month)
ci_sb_discov_skills_peer_hatleads_converted_count	Sb Discov Skills Peer Leads & Accounts Converted Count	FLOAT		The leads and accounts converted in the month
ci_sb_discov_skills_peer_post_sales_support_completed_steps	Sb Discov Skills Peer Post Sales Support Completed Steps	FLOAT		The total number of closed post sales support stages in the month
ci_sb_discov_skills_peer_post_sales_support_completed_steps_prob	Sb Discov Skills Peer Post Sales Support Completed Steps Prob	FLOAT		The sum of expected success rate of the closed post sales support stages (that then is divided by num of closed deal to get the avg. probability for deals won in that month)
ci_sb_discov_skills_peer_post_sales_support_completed_steps_started_upselling	Sb Discov Skills Peer Post Sales Support Completed Steps Started Upselling	FLOAT		The post sales support stages started_upselling in the month
ci_sb_discov_skills_peer_recycled_completed_steps	Sb Discov Skills Peer Recycled Completed Steps	FLOAT		The total number of closed recycled accounts in the month

users_history field_name	display_name	data_type	length	description
ci_sb_discov_skills_peer_recycled_completed_steps_converted	Sb Discov Skills Peer Recycled Completed Steps Converted	FLOAT		The recycled accounts converted in the month
ci_sb_discov_skills_peer_recycled_completed_steps_prob	Sb Discov Skills Peer Recycled Completed Steps Prob	FLOAT		The sum of expected success rate of the closed recycled accounts (that then is divided by num of closed deal to get the avg. probability for deals won in that month)
ci_sb_discov_skills_post_sales_support_completed_steps	Sb Discov Skills Post Sales Support Completed Steps	INTEGER		The total number of closed post sales support stages in the month
ci_sb_discov_skills_post_sales_support_completed_steps_prob	Sb Discov Skills Post Sales Support Completed Steps Prob	FLOAT		The sum of expected success rate of the closed post sales support stages (that then is divided by num of closed deal to get the avg. probability for deals won in that month)
ci_sb_discov_skills_post_sales_support_completed_steps_started_upselling	Sb Discov Skills Post Sales Support Completed Steps Started Upselling	INTEGER		The post sales support stages started_upselling in the month
ci_sb_discov_skills_recycled_completed_steps	Sb Discov Skills Recycled Completed Steps	INTEGER		The total number of closed recycled accounts in the month
ci_sb_discov_skills_recycled_completed_steps_converted	Sb Discov Skills Recycled Completed Steps Converted	INTEGER		The recycled accounts converted in the month

users_history field_name	display_name	data_type	length	description
ci_sb_discov_skills_recycled_completed_steps_prob	Sb Discov Skills Recycled Completed Steps Prob	FLOAT		The sum of expected success rate of the closed recycled accounts (that then is divided by num of closed deal to get the avg. probability for deals won in that month)
ci_time_alloc_act_capt_lvl_adjustment	Time Allocation Activities Capture Level Adjustment	FLOAT		act_capture_level adjustment factor to account for the user's act_capture_level score
ci_time_alloc_conf	Time Allocation Confidence	FLOAT		User's time allocation values confidence in the period
ci_time_alloc_internal	Time Allocation Internal	FLOAT		Average number of weekly hours the user spent on internal activities in the period
ci_time_alloc_internal_dur	Time Allocation Internal Duration	FLOAT		Duration of the activities the user performed internally in the period
ci_time_alloc_internal_eng	Time Allocation Internal Engaged	FLOAT		Average number of weekly hours the user spent on engaged internal activities in the period
ci_time_alloc_internal_eng_dur	Time Allocation Internal Engaged Duration	FLOAT		Duration of the engaged activities the user performed internally in the period
ci_time_alloc_month_to_week_adjustment	Time Allocation Month to Week Adjustment	FLOAT		Week adjustment factor to convert monthly to weekly
ci_time_alloc_new_logo	Time Allocation New Logo	FLOAT		Average number of weekly hours the user spent on new logo selling activities in the period

users_history field_name	display_name	data_type	length	description
ci_time_alloc_new_logo_dur	Time Allocation New Logo Duration	FLOAT		Duration of the activities the user performed when new logo selling in the period
ci_time_alloc_new_logo_eng	Time Allocation New Logo Engaged	FLOAT		Average number of weekly hours the user spent on engaged new logo selling activities in the period
ci_time_alloc_new_logo_eng_dur	Time Allocation New Logo Engaged Duration	FLOAT		Duration of the engaged activities the user performed when new logo selling in the period
ci_time_alloc_post_sales	Time Allocation Post Sales	FLOAT		Average number of weekly hours the user spent on post-sales support activities in the period
ci_time_alloc_post_sales_dur	Time Allocation Post Sales Duration	FLOAT		Duration of the activities the user performed when post sales support in the period
ci_time_alloc_post_sales_eng	Time Allocation Post Sales Engaged	FLOAT		Average number of weekly hours the user spent on engaged post-sales support activities in the period
ci_time_alloc_post_sales_eng_dur	Time Allocation Post Sales Engaged Duration	FLOAT		Duration of the engaged activities the user performed when doing post-sales support in the period
ci_time_alloc_prep_adjustment	Time Allocation Prep Adjustment	FLOAT		Prep adjustment factor to account for the preparation time needed apart from sales related activities
ci_time_alloc_prospecting	Time Allocation Prospecting	FLOAT		Average number of weekly hours the user spent on prospecting activities in the period

users_history field_name	display_name	data_type	length	description
ci_time_alloc_prospecting_dur	Time Allocation Prospecting Duration	FLOAT		Duration of the activities the user performed when prospecting in the period
ci_time_alloc_prospecting_eng	Time Allocation Prospecting Engaged	FLOAT		Average number of weekly hours the user spent on engaged prospecting activities in the period
ci_time_alloc_prospecting_eng_dur	Time Allocation Prospecting Engaged Duration	FLOAT		Duration of the engaged activities the user performed when prospecting in the period
ci_time_alloc_tot	Time Allocation Total	FLOAT		Average number of weekly hours the user spent on activities in the period
ci_time_alloc_tot_dur	Time Allocation Total Duration	FLOAT		Duration of the activities the user performed in the period
ci_time_alloc_tot_eng	Time Allocation Total Engaged	FLOAT		Average number of weekly hours the user spent on engaged activities in the period
ci_time_alloc_tot_eng_dur	Time Allocation Total Engaged Duration	FLOAT		Duration of the engaged activities the user performed in the period
ci_time_alloc_tot_selling	Time Allocation Total Selling	FLOAT		Average number of weekly hours the user spent on sales related activities in the period
ci_time_alloc_tot_selling_dur	Time Allocation Total Selling Duration	FLOAT		Duration of the sales related activities the user performed in the period

users_history field_name	display_name	data_type	length	description
ci_time_alloc_tot_selling_eng	Time Allocation Total Selling Engaged	FLOAT		Average number of weekly hours the user spent on engaged sales related activities in the period
ci_time_alloc_tot_selling_eng_dur	Time Allocation Total Selling Engaged Duration	FLOAT		Duration of the engaged sales related activities the user performed in the period
ci_time_alloc_upselling	Time Allocation Upselling	FLOAT		Average number of weekly hours the user spent on upselling activities in the period
ci_time_alloc_upselling_dur	Time Allocation Upselling Duration	FLOAT		Duration of the activities the user performed when upselling in the period
ci_time_alloc_upselling_eng	Time Allocation Upselling Engaged	FLOAT		Average number of weekly hours the user spent on engaged upselling activities in the period
ci_time_alloc_upselling_eng_dur	Time Allocation Upselling Engaged Duration	FLOAT		Duration of the engaged activities the user performed when upselling in the period
ci_work_effort	Work Effort	FLOAT		User's work effort score in the period
ci_work_effort_conf	Work Effort Confidence	FLOAT		User's work effort score confidence in the period
ci_work_effort_pi_peer_time_alloc_internal	Work Effort Peek Inside Peer Time Allocation Internal	FLOAT		Average number of weekly hours the user's peers spent on internal activities in the period
ci_work_effort_pi_peer_time_alloc_new_logo	Work Effort Peek Inside Peer Time	FLOAT		Average number of weekly hours the user's peers spent on new logo selling activities in the period

users_history field_name	display_name	data_type	length	description
	Allocation New Logo			
ci_work_effort_pi_peer_time_alloc_post_sales	Work Effort Peek Inside Peer Time Allocation Post Sales	FLOAT		Average number of weekly hours the user's peers spent on post-sales support activities in the period
ci_work_effort_pi_peer_time_alloc_prospecting	Work Effort Peek Inside Peer Time Allocation Prospecting	FLOAT		Average number of weekly hours the user's peers spent on prospecting activities in the period
ci_work_effort_pi_peer_time_alloc_tot	Work Effort Peek Inside Peer Time Allocation Total	FLOAT		Average total number of weekly hours the user's peers spent on activities in the period
ci_work_effort_pi_peer_time_alloc_tot_selling	Work Effort Peek Inside Peer Time Allocation Total Selling	FLOAT		Average number of weekly hours the user's peers spent on sales related activities in the period
ci_work_effort_pi_peer_time_alloc_upselling	Work Effort Peek Inside Peer Time Allocation Upselling	FLOAT		Average number of weekly hours the user's peers spent on upselling activities in the period
ci_work_effort_pi_time_alloc_internal	Work Effort Peek Inside Time Allocation Internal	FLOAT		Average number of weekly hours the user spent on internal activities in the period
ci_work_effort_pi_time_alloc_new_logo	Work Effort Peek Inside Time Allocation New Logo	FLOAT		Average number of weekly hours the user spent on new logo selling activities in the period

users_history field_name	display_name	data_type	length	description
ci_work_effort_pi_time_alloc_post_sales	Work Effort Peek Inside Time Allocation Post Sales	FLOAT		Average number of weekly hours the user spent on post-sales support activities in the period
ci_work_effort_pi_time_alloc_prospecting	Work Effort Peek Inside Time Allocation Prospecting	FLOAT		Average number of weekly hours the user spent on prospecting activities in the period
ci_work_effort_pi_time_alloc_tot	Work Effort Peek Inside Time Allocation Total	FLOAT		Average total number of weekly hours the user spent on activities in the period
ci_work_effort_pi_time_alloc_tot_selling	Work Effort Peek Inside Time Allocation Total Selling	FLOAT		Average number of weekly hours the user spent on sales related activities in the period
ci_work_effort_pi_time_alloc_upselling	Work Effort Peek Inside Time Allocation Upselling	FLOAT		Average number of weekly hours the user spent on upselling activities in the period
ci_work_effort_stats_is_applicable	Work Effort Stats Is Applicable	BOOLEAN		Boolean flag that indicates whether the score is applicable to the user in the period, based on whether the user was active
ci_work_effort_stats_potential_value	Work Effort Stats Potential Value	FLOAT		Potential value that would be delivered by the user in the period if their score was at the peer average or higher, above 0 for users with scores below the peer average
ci_work_effort_stats_realized_value	Work Effort Stats Realized Value	FLOAT		Value realized by the user in the period by improving their score relative to the previous period, as a portion of the potential value
crm_addr_city	CRM Address City	STRING	150	User's city in the CRM

users_history field_name	display_name	data_type	length	description
crm_addr_country	CRM Address Country	STRING	150	User's country in the CRM
crm_addr_postal_code	CRM Address Postal Code	STRING	150	User's postal code in the CRM
crm_addr_state	CRM Address State	STRING	150	User's state in the CRM
crm_addr_street	CRM Address Street	STRING	150	User's street in the CRM
crm_createdon	CRM Created On	DATETIME		User's creation date in the CRM
crm_creator_id	CRM Creator ID	STRING	50	User creator's id in the CRM
crm_department	CRM Department	STRING	50	User's department in the CRM
crm_division	CRM Division	STRING	50	User's division in the CRM
crm_email	CRM Email	STRING	150	User's email
crm_first_name	CRM First Name	STRING	150	User's first name
crm_language_locale	CRM Language Locale	STRING	50	User's language locale
crm_last_login_time	CRM Last Login Time	DATETIME		User's last login time in the CRM
crm_last_name	CRM Last Name	STRING	150	User's last name
crm_locale	CRM Locale	STRING	50	User's locale
crm_manager_id	CRM Manager ID	STRING	50	User manager's id in the CRM

users_history field_name	display_name	data_type	length	description
crm_profile_url	CRM Profile URL	STRING	150	User's avatar URL
crm_role	CRM Role	STRING	150	User's CRM role
crm_time_zone	CRM Time Zone	STRING	50	User's time zone
crm_title	CRM Title	STRING	150	User's CRM title
crm_user_type	CRM User Type	STRING	50	User's CRM type
crm_username	CRM Username	STRING	150	User's username
di_crm_accounts_created_count	CRM Accounts Created Count	INTEGER		Number of accounts created by the user in the CRM in the period
di_crm_accounts_handed_off_count	CRM Accounts Handed Off Count	INTEGER		Number of accounts handed off by the user in the CRM in the period
di_crm_accounts_open_count	CRM Accounts Open Count	INTEGER		Number of accounts owned by the user in the CRM that were open at the end of the period
di_crm_accounts_owned_count	CRM Accounts Owned Count	INTEGER		Number of accounts owned by the user in the CRM in the period
di_crm_accounts_received_count	CRM Accounts Received Count	INTEGER		Number of accounts received by the user in the CRM in the period
di_crm_customer_accounts_owned_count	CRM Customer Accounts Owned Count	INTEGER		Number of customer accounts owned by the user in the CRM in the period

users_history field_name	display_name	data_type	length	description
di_crm_leads_converted_count	CRM Leads Converted Count	INTEGER		Number of leads converted by the user in the CRM in the period
di_crm_leads_created_count	CRM Leads Created Count	INTEGER		Number of leads created by the user in the CRM in the period
di_crm_leads_handed_off_count	CRM Leads Handed Off Count	INTEGER		Number of leads handed off by the user in the CRM in the period
di_crm_leads_open_count	CRM Leads Open Count	INTEGER		Number of leads owned by the user in the CRM that were open at the end of the period
di_crm_leads_owned_count	CRM Leads Owned Count	INTEGER		Number of leads owned by the user in the CRM in the period
di_crm_leads_received_count	CRM Leads Received Count	INTEGER		Number of leads received by the user in the CRM in the period
di_crm_opps_closed_amt	CRM Opps Closed Amount	FLOAT		Sum of the booking amounts of opportunities closed by the user in the CRM in the period
di_crm_opps_closed_count	CRM Opps Closed Count	INTEGER		Number of opportunities closed by the user in the CRM in the period
di_crm_opps_created_amt	CRM Opps Created Amount	FLOAT		Sum of the booking amounts of opportunities created by the user in the CRM in the period
di_crm_opps_created_count	CRM Opps Created Count	INTEGER		Number of opportunities created by the user in the CRM in the period
di_crm_opps_handed_off_count	CRM Opps Handed Off Count	INTEGER		Number of opportunities handed off by the user in the CRM in the period
di_crm_opps_lost_amt	CRM Opps Lost Amount	FLOAT		Sum of the booking amounts of opportunities lost by the user in the CRM in the period

users_history field_name	display_name	data_type	length	description
di_crm_opps_lost_count	CRM Opps Lost Count	INTEGER		Number of opportunities lost by the user in the CRM in the period
di_crm_opps_open_amt	CRM Opps Open Amount	FLOAT		Sum of the booking amounts of opportunities owned by the user in the CRM that were open at the end of the period
di_crm_opps_open_count	CRM Opps Open Count	INTEGER		Number of opportunities owned by the user in the CRM that were open at the end of the period
di_crm_opps_owned_amt	CRM Opps Owned Amount	FLOAT		Sum of the booking amounts of opportunities owned by the user in the CRM in the period
di_crm_opps_owned_count	CRM Opps Owned Count	INTEGER		Number of opportunities owned by the user in the CRM in the period
di_crm_opps_received_amt	CRM Opps Received Amount	FLOAT		Sum of the booking amounts of opportunities received by the user in the CRM in the period
di_crm_opps_received_count	CRM Opps Received Count	INTEGER		Number of opportunities received by the user in the CRM in the period
di_crm_opps_sum_closing_cycle	CRM Opps Sum Closing Cycle	FLOAT		Sum of days from the creation date to close date of opportunities owned by the user in the CRM in the period
di_crm_opps_won_amt	CRM Opps Won Amount	FLOAT		Sum of the booking amounts of opportunities won by the user in the CRM in the period
di_crm_opps_won_count	CRM Opps Won Count	INTEGER		Number of opportunities won by the user in the CRM in the period
di_trueai_accounts_dupes_owned_count	Accounts Dupes Owned Count	INTEGER		Number of accounts that have a duplicate owned by the user in the period
di_trueai_accounts_owned_count	Accounts Owned Count	INTEGER		Number of accounts owned by the user in the period

users_history field_name	display_name	data_type	length	description
di_trueai_customer_accounts_active_count	Customer Accounts Active Count	INTEGER		Number of customer accounts owned by the user that were open at the end of the period
di_trueai_customer_accounts_active_touched_count	Customer Accounts Active Touched Count	INTEGER		Number of touched customer accounts owned by the user that were open at the end of the period
di_trueai_customer_accounts_active_untouched_count	Customer Accounts Active Untouched Count	INTEGER		Number of untouched customer accounts owned by the user that were open at the end of the period
di_trueai_customer_accounts_closed_count	Customer Accounts Closed Count	INTEGER		Number of customer accounts closed by the user in the period
di_trueai_customer_accounts_closed_sum_act	Customer Accounts Closed Sum Activities	FLOAT		Number of activities performed on customer accounts closed by the user in the period
di_trueai_customer_accounts_closed_sum_eng_act	Customer Accounts Closed Sum Engaged Activities	INTEGER		Number of engaged activities performed on customer accounts closed by the user in the period
di_trueai_customer_accounts_created_count	Customer Accounts Created Count	INTEGER		Number of customer accounts created by the user in the period
di_trueai_customer_accounts_discarded_abandoned_count	Customer Accounts Discarded Abandoned Count	INTEGER		Number of customer accounts abandoned by the user in the period
di_trueai_customer_accounts_discarded_count	Customer Accounts Discarded Count	INTEGER		Number of customer accounts discarded by the user in the period

users_history field_name	display_name	data_type	length	description
di_trueai_customer_accounts_handed_off_count	Customer Accounts Handed Off Count	INTEGER		Number of customer accounts handed off by the user in the period
di_trueai_customer_accounts_handed_off_value	Customer Accounts Handed Off Value	FLOAT		Value of customer accounts handed off by the user in the period
di_trueai_customer_accounts_new_opp_count	Customer Accounts New Opp Count	INTEGER		Number of customer accounts with an upsell opportunity created owned by the user in the period
di_trueai_customer_accounts_new_opp_lost_count	Customer Accounts New Opp Lost Count	INTEGER		Number of customer accounts with an upsell opportunity created owned by the user in the period
di_trueai_customer_accounts_new_opp_sum_act	Customer Accounts New Opp Sum Activities	INTEGER		Number of activities performed on customer accounts owned by the user in the period
di_trueai_customer_accounts_new_opp_sum_eng_act	Customer Accounts New Opp Sum Engaged Activities	INTEGER		Number of engaged activities performed on customer accounts owned by the user in the period
di_trueai_customer_accounts_new_opp_won_count	Customer Accounts New Opp Won Count	INTEGER		Number of customer accounts with an upsell opportunity created owned by the user in the period
di_trueai_customer_accounts_owned_count	Customer Accounts Owned Count	INTEGER		Number of customer accounts owned by the user in the period
di_trueai_customer_accounts_received_count	Customer Accounts Received Count	INTEGER		Number of customer accounts received by the user in the period

users_history field_name	display_name	data_type	length	description
di_trueai_customer_accounts_received_value	Customer Accounts Received Value	FLOAT		Value of customer accounts received by the user in the period
di_trueai_customer_accounts_sum_new_opp_cycle	Customer Accounts Sum New Opp Cycle	FLOAT		Sum of days from the start of post-sales support to upsell opportunity creation of customer accounts owned by the user in the period
di_trueai_hat_leads_active_count	Hat Leads Active Count	INTEGER		Number of leads and accounts owned by the user that were open at the end of the period
di_trueai_hat_leads_active_prospecting_count	Hat Leads Active Prospecting Count	INTEGER		Number of prospected leads and accounts owned by the user that were open at the end of the period
di_trueai_hat_leads_active_untouched_count	Hat Leads Active Untouched Count	INTEGER		Number of untouched leads and accounts owned by the user that were open at the end of the period
di_trueai_hat_leads_closed_count	Hat Leads Closed Count	INTEGER		Number of leads and accounts closed by the user in the period
di_trueai_hat_leads_converted_count	Hat Leads Converted Count	INTEGER		Number of leads and accounts converted by the user in the period
di_trueai_hat_leads_converted_lost_count	Hat Leads Converted Lost Count	INTEGER		Number of leads and accounts converted by the user in the period that resulted in a lost opportunity
di_trueai_hat_leads_converted_selling_count	Hat Leads Converted Selling Count	INTEGER		Number of leads and accounts converted by the user in the period that resulted in an opportunity that is still open
di_trueai_hat_leads_converted_sum_act	Hat Leads Converted Sum Activities	INTEGER		Number of activities performed on leads and accounts converted by the user in the period
di_trueai_hat_leads_converted_sum_eng_act	Hat Leads Converted	INTEGER		Number of engaged activities performed on leads and accounts converted by the user in the period

users_history field_name	display_name	data_type	length	description
	Sum Engaged Activities			
di_trueai_hat_leads_converted_won_count	Hat Leads Converted Won Count	INTEGER		Number of leads and accounts converted by the user in the period that resulted in a won opportunity
di_trueai_hat_leads_created_count	Hat Leads Created Count	INTEGER		Number of leads and accounts created by the user in the period
di_trueai_hat_leads_discarded_abandoned_count	Hat Leads Discarded Abandoned Count	INTEGER		Number of leads and accounts abandoned by the user in the period
di_trueai_hat_leads_discarded_count	Hat Leads Discarded Count	INTEGER		Number of leads and accounts discarded by the user in the period
di_trueai_hat_leads_discarded_disqualified_count	Hat Leads Discarded Disqualified Count	INTEGER		Number of leads and accounts disqualified by the user in the period
di_trueai_hat_leads_discarded_sum_act	Hat Leads Discarded Sum Activities	INTEGER		Number of activities performed on leads and accounts discarded by the user in the period
di_trueai_hat_leads_discarded_sum_eng_act	Hat Leads Discarded Sum Engaged Activities	INTEGER		Number of engagedactivities performed on leads and accounts discarded by the user in the period
di_trueai_hat_leads_handed_off_count	Hat Leads Handed Off Count	INTEGER		Number of leads and accounts handed off by the user in the period
di_trueai_hat_leads_owned_count	Hat Leads Owned Count	INTEGER		Number of leads and accounts owned by the user in the period
di_trueai_hat_leads_owned_plus_discarded_count	Hat Leads Owned Plus Discarded Count	INTEGER		Number of leads and accounts owned, discarded or handed off by the user in the period

users_history field_name	display_name	data_type	length	description
di_trueai_hat_leads_received_count	Hat Leads Received Count	INTEGER		Number of leads and accounts received by the user in the period
di_trueai_hat_leads_received_value	Hat Leads Received Value	FLOAT		Value of leads and accounts received by the user in the period
di_trueai_hat_leads_sum_conversion_cycle	Hat Leads Sum Conversion Cycle	FLOAT		Sum of days from the start of prospecting to conversion date of leads and accounts owned by the user in the period
di_trueai_leads_dupes_owned_count	Leads Dupes Owned Count	INTEGER		Number of leads that have a duplicate owned by the user in the period
di_trueai_leads_owned_count	Leads Owned Count	INTEGER		Number of leads owned by the user in the period
di_trueai_opps_closed_amt	Opps Closed Amount	FLOAT		Sum of the booking amounts of opportunities closed by the user in the period
di_trueai_opps_closed_count	Opps Closed Count	INTEGER		Number of opportunities closed by the user in the period
di_trueai_opps_closed_mid_late_count	Opps Closed Mid Late Count	INTEGER		Number of opportunities that reached the middle stage closed by the user in the period
di_trueai_opps_created_amt	Opps Created Amount	FLOAT		Sum of the booking amounts of opportunities created by the user in the period
di_trueai_opps_created_count	Opps Created Count	INTEGER		Number of opportunities created by the user in the period
di_trueai_opps_created_new_logos_amt	Opps Created New Logos Amount	FLOAT		Sum of the booking amounts of new logo opportunities created by the user in the period
di_trueai_opps_created_new_logos_count	Opps Created New Logos Count	INTEGER		Number of new logo opportunities created by the user in the period

users_history field_name	display_name	data_type	length	description
di_trueai_opps_created_renewals_amt	Opps Created Renewals Amount	FLOAT		Sum of the booking amounts of renewal opportunities created by the user in the period
di_trueai_opps_created_renewals_count	Opps Created Renewals Count	INTEGER		Number of renewal opportunities created by the user in the period
di_trueai_opps_created_upsells_amt	Opps Created Upsells Amount	FLOAT		Sum of the booking amounts of upsell opportunities created by the user in the period
di_trueai_opps_created_upsells_count	Opps Created Upsells Count	INTEGER		Number of upsell opportunities created by the user in the period
di_trueai_opps_handed_off_amt	Opps Handed Off Amount	FLOAT		Sum of the booking amounts of opportunities handed off by the user in the period
di_trueai_opps_handed_off_count	Opps Handed Off Count	INTEGER		Number of opportunities handed off by the user in the period
di_trueai_opps_lost_amt	Opps Lost Amount	FLOAT		Sum of the booking amounts of opportunities lost by the user in the period
di_trueai_opps_lost_count	Opps Lost Count	INTEGER		Number of opportunities lost by the user in the period
di_trueai_opps_lost_new_logos_amt	Opps Lost New Logos Amount	FLOAT		Sum of the booking amounts of new logo opportunities lost by the user in the period
di_trueai_opps_lost_new_logos_count	Opps Lost New Logos Count	INTEGER		Number of new logo opportunities lost by the user in the period
di_trueai_opps_lost_new_logos_sum_act	Opps Lost New Logos Sum Activities	INTEGER		Number of activities performed on new logo opportunities lost by the user in the period
di_trueai_opps_lost_new_logos_sum_eng_act	Opps Lost New Logos Sum Engaged Activities	INTEGER		Number of engaged activities performed on new logo opportunities lost by the user in the period

users_history field_name	display_name	data_type	length	description
di_trueai_opps_lost_p2_init	Opps Lost Initial Opp Win Probability	FLOAT		Sum of probability of success of opportunities lost by the user in the period
di_trueai_opps_lost_renewals_amt	Opps Lost Renewals Amount	FLOAT		Sum of the booking amounts of renewal opportunities lost by the user in the period
di_trueai_opps_lost_renewals_count	Opps Lost Renewals Count	INTEGER		Number of renewal opportunities lost by the user in the period
di_trueai_opps_lost_upsells_amt	Opps Lost Upsells Amount	FLOAT		Sum of the booking amounts of upsell opportunities lost by the user in the period
di_trueai_opps_lost_upsells_count	Opps Lost Upsells Count	INTEGER		Number of upsell opportunities lost by the user in the period
di_trueai_opps_lost_upsells_sum_act	Opps Lost Upsells Sum Activities	INTEGER		Number of activities performed on upsell opportunities lost by the user in the period
di_trueai_opps_lost_upsells_sum_eng_act	Opps Lost Upsells Sum Engaged Activities	INTEGER		Number of engaged activities performed on upsell opportunities lost by the user in the period
di_trueai_opps_open_amt	Opps Open Amount	FLOAT		Sum of the booking amounts of opportunities owned by the user that were open at the end of the period
di_trueai_opps_open_count	Opps Open Count	INTEGER		Number of opportunities owned by the user that were open at the end of the period
di_trueai_opps_open_early_amt	Opps Open Early Amount	FLOAT		Sum of the booking amounts of opportunities owned by the user that were in the early stage at the end of the period
di_trueai_opps_open_early_count	Opps Open Early Count	INTEGER		Number of opportunities owned by the user that were in the early stage at the end of the period

users_history field_name	display_name	data_type	length	description
di_trueai_opps_open_late_amt	Opps Open Late Amount	FLOAT		Sum of the booking amounts of opportunities owned by the user that were in the late stage at the end of the period
di_trueai_opps_open_late_count	Opps Open Late Count	INTEGER		Number of opportunities owned by the user that were in the late stage at the end of the period
di_trueai_opps_open_mid_amt	Opps Open Mid Amount	FLOAT		Sum of the booking amounts of opportunities owned by the user that were in the middle stage at the end of the period
di_trueai_opps_open_mid_count	Opps Open Mid Count	INTEGER		Number of opportunities owned by the user that were in the middle stage at the end of the period
di_trueai_opps_open_new_logos_amt	Opps Open New Logos Amount	FLOAT		Sum of the booking amounts of new logo opportunities owned by the user that were open at the end of the period
di_trueai_opps_open_new_logos_count	Opps Open New Logos Count	INTEGER		Number of new logo opportunities owned by the user that were open at the end of the period
di_trueai_opps_open_renewals_amt	Opps Open Renewals Amount	FLOAT		Sum of the booking amounts of renewal opportunities owned by the user that were open at the end of the period
di_trueai_opps_open_renewals_count	Opps Open Renewals Count	INTEGER		Number of renewal opportunities owned by the user that were open at the end of the period
di_trueai_opps_open_upsells_amt	Opps Open Upsells Amount	FLOAT		Sum of the booking amounts of upsell opportunities owned by the user that were open at the end of the period
di_trueai_opps_open_upsells_count	Opps Open Upsells Count	INTEGER		Number of upsell opportunities owned by the user that were open at the end of the period
di_trueai_opps_owned_amt	Opps Owned Amount	FLOAT		Number of opportunities owned by the user in the period
di_trueai_opps_owned_count	Opps Owned Count	INTEGER		Number of opportunities owned by the user in the period

users_history field_name	display_name	data_type	length	description
di_trueai_opps_received_amt	Opps Received Amount	FLOAT		Sum of the booking amounts of opportunities received by the user in the period
di_trueai_opps_received_count	Opps Received Count	INTEGER		Number of opportunities received by the user in the period
di_trueai_opps_received_new_logos_amt	Opps Received New Logos Amount	FLOAT		Sum of the booking amounts of new logo opportunities received by the user in the period
di_trueai_opps_received_new_logos_count	Opps Received New Logos Count	INTEGER		Number of new logo opportunities received by the user in the period
di_trueai_opps_received_post_sales_value	Opps Received Post Sales Value	FLOAT		Value of upsell opportunities received by the user in the period
di_trueai_opps_received_prospecting_value	Opps Received Prospecting Value	FLOAT		Value of new logo opportunities received by the user in the period
di_trueai_opps_received_renewals_amt	Opps Received Renewals Amount	FLOAT		Sum of the booking amounts of renewal opportunities received by the user in the period
di_trueai_opps_received_renewals_count	Opps Received Renewals Count	INTEGER		Number of renewal opportunities received by the user in the period
di_trueai_opps_received_upsells_amt	Opps Received Upsells Amount	FLOAT		Sum of the booking amounts of upsell opportunities received by the user in the period
di_trueai_opps_received_upsells_count	Opps Received Upsells Count	INTEGER		Number of upsell opportunities received by the user in the period

users_history field_name	display_name	data_type	length	description
di_trueai_opps_sum_closing_cycle	Opps Sum Closing Cycle	FLOAT		Sum of days from the start of selling to close date of opportunities closed by the user in the period
di_trueai_opps_sum_closing_cycle_lost	Opps Sum Closing Cycle Lost	FLOAT		Sum of days from the start of selling to close date of opportunities lost by the user in the period
di_trueai_opps_sum_closing_cycle_won	Opps Sum Closing Cycle Won	FLOAT		Sum of days from the start of selling to close date of opportunities won by the user in the period
di_trueai_opps_won_amt	Opps Won Amount	FLOAT		Sum of the booking amounts of opportunities won by the user in the period
di_trueai_opps_won_count	Opps Won Count	INTEGER		Number of opportunities won by the user in the period
di_trueai_opps_won_discount	Opps Won Discount	FLOAT		Average percentage change of booking amount from middle stage to closed stage of opportunities won by the user in the period
di_trueai_opps_won_mid_late_count	Opps Won Mid Late Count	INTEGER		Number of opportunities that reached the middle stage won by the user in the period
di_trueai_opps_won_new_logos_amt	Opps Won New Logos Amount	FLOAT		Sum of the booking amounts of new logo opportunities won by the user in the period
di_trueai_opps_won_new_logos_count	Opps Won New Logos Count	INTEGER		Number of new logo opportunities won by the user in the period
di_trueai_opps_won_new_logos_sum_act	Opps Won New Logos Sum Activities	INTEGER		Number of activities performed on new logo opportunities won by the user in the period
di_trueai_opps_won_new_logos_sum_eng_act	Opps Won New Logos Sum Engaged Activities	INTEGER		Number of engaged activities performed on new logo opportunities won by the user in the period
di_trueai_opps_won_p2_init	Opps Won Initial Opp	FLOAT		Sum of probability of success of opportunities won by the user in the period

users_history field_name	display_name	data_type	length	description
	Win Probability			
di_trueai_opps_won_renewals_amt	Opps Won Renewals Amount	FLOAT		Sum of the booking amounts of renewal opportunities won by the user in the period
di_trueai_opps_won_renewals_count	Opps Won Renewals Count	INTEGER		Number of renewal opportunities won by the user in the period
di_trueai_opps_won_upsells_amt	Opps Won Upsells Amount	FLOAT		Sum of the booking amounts of upsell opportunities won by the user in the period
di_trueai_opps_won_upsells_count	Opps Won Upsells Count	INTEGER		Number of upsell opportunities won by the user in the period
di_trueai_opps_won_upsells_sum_act	Opps Won Upsells Sum Activities	INTEGER		Number of activities performed on upsell opportunities won by the user in the period
di_trueai_opps_won_upsells_sum_eng_act	Opps Won Upsells Sum Engaged Activities	INTEGER		Number of engaged activities performed on upsell opportunities won by the user in the period
trueai_billable	Billable	BOOLEAN		Boolean flag that indicates whether the user is billable
trueai_direct_reports	Direct Reports	INTEGER		Number of direct reports the user was managing in the period
trueai_group	Group	STRING	150	User's group
trueai_group_conf	Group Confidence	FLOAT		User's group confidence
trueai_hire_date	Hire Date	DATETIME		User's hire date
trueai_is_manager	Is Manager	BOOLEAN		Boolean flag that indicates whether the user is a manager
trueai_manager_id	Manager ID	STRING	150	User manager's id

users_history field_name	display_name	data_type	length	description
trueai_manager_id_conf	Manager ID Confidence	FLOAT		User's standardized manager's id confidence
trueai_manager_ids	Manager Ids	OBJECT	2000	User managers' ids
trueai_notes_given_count	Notes Given Count	INTEGER		Number of notes the user gave in the period
trueai_notes_received_count	Notes Received Count	INTEGER		Number of notes the user received in the period
trueai_notes_received_last_date	Notes Received Last Date	DATETIME		Date of the last note the user received
trueai_role	Role	STRING	150	User's standardized role
trueai_role_conf	Role Confidence	FLOAT		User's standardized role confidence
trueai_tenure	Tenure	INTEGER		Number of months since the user's hire date
trueai_termination_date	Termination Date	DATETIME		User's termination date
trueai_title	Title	STRING	150	User's standardized title
trueai_title_conf	Title Confidence	FLOAT		User's standardized title confidence
trueai_tot_reports	Total Reports	INTEGER		Number of direct and indirect reports the user was managing in the period
trueai_user_behavior	User Behavior	STRING	150	User's standardized user_
trueai_user_behavior_conf	User Behavior Confidence	FLOAT		User's standardized behavior confidence
trueai_user_role	Standardized Role	STRING	150	User's standardized and combined role

users_history field_name	display_name	data_type	length	description
trueai_user_role_dept	Standardized Role Department	STRING	50	User's department derived from the standardized and combined role
trueai_user_role_function	Standardized Role Function	STRING	50	User's function derived from the standardized and combined role
vi_value_created_leads_and_accounts	Value Created Leads and Accounts	FLOAT		Value created in lead gen and repeat accounts in the period
vi_value_created_leads_and_accounts_leadgen	Value Created Leads and Accounts Lead Generation	FLOAT		Value created in lead gen in the period
vi_value_created_leads_and_accounts_repeat	Value Created Leads and Accounts Repeat	FLOAT		Value created in repeat accounts in the period
vi_value_created_preselling	Value Created Pre-selling	FLOAT		Value created in prospecting and post-sales support in the period
vi_value_created_preselling_post_sales	Value Created Pre-selling Post Sales	FLOAT		Value created in post-sales support in the period
vi_value_created_preselling_prospecting	Value Created Pre-selling Prospecting	FLOAT		Value created in prospecting in the period
vi_value_created_selling	Value Created Selling	FLOAT		Value created in new logo selling and upselling in the period
vi_value_created_selling_new_logo	Value Created	FLOAT		Value created in new logo selling in the period

users_history field_name	display_name	data_type	length	description
	Selling New Logo			
vi_value_created_selling_upselling	Value Created Selling Upselling	FLOAT		Value created in upselling in the period
vi_value_created_tot	Value Created Total	FLOAT		Total value created in the period
vi_value_delivered_expect	Value Delivered Expected	FLOAT		Expected value delivered in the period given the rep's skills & behaviors and value received
vi_value_delivered_leads_and_accounts	Value Delivered Leads and Accounts	FLOAT		Value delivered in lead gen and repeat accounts in the period
vi_value_delivered_leads_and_accounts_leadgen	Value Delivered Leads and Accounts Lead Generation	FLOAT		Value delivered in lead gen in the period
vi_value_delivered_leads_and_accounts_repeat	Value Delivered Leads and Accounts Repeat	FLOAT		Value delivered in repeat accounts in the period
vi_value_delivered_potential	Value Delivered Potential	FLOAT		Potential value delivered in the period if all rep's skills & behaviors were at the team average level or higher
vi_value_delivered_preselling	Value Delivered Pre-selling	FLOAT		Value delivered in prospecting and post-sales support in the period
vi_value_delivered_preselling_post_sales	Value Delivered Pre-selling Post Sales	FLOAT		Value delivered in post-sales support in the period

users_history field_name	display_name	data_type	length	description
vi_value_delivered_preselling_prospecting	Value Delivered Pre-selling Prospecting	FLOAT		Value delivered in prospecting in the period
vi_value_delivered_selling	Value Delivered Selling	FLOAT		Value delivered in new logo selling and upselling in the period
vi_value_delivered_selling_new_logo	Value Delivered Selling New Logo	FLOAT		Value delivered in new logo selling in the period
vi_value_delivered_selling_upselling	Value Delivered Selling Upselling	FLOAT		Value delivered in upselling in the period
vi_value_delivered_tot	Value Delivered Total	FLOAT		Total value delivered in the period
vi_value_received_for_preselling	Value Received for Pre-selling	FLOAT		Value received for prospecting and post-sales support in the period
vi_value_received_for_preselling_post_sales	Value Received for Pre-selling Post Sales	FLOAT		Value received for post-sales support in the period
vi_value_received_for_preselling_prospecting	Value Received for Pre-selling Prospecting	FLOAT		Value received for prospecting in the period
vi_value_received_for_selling	Value Received for Selling	FLOAT		Value received for new logo selling and upselling in the period
vi_value_received_for_selling_new_logo	Value Received for Selling New Logo	FLOAT		Value received for new logo selling in the period

users_history field_name	display_name	data_type	length	description
vi_value_received_for_selling_upselling	Value Received for Selling Upselling	FLOAT		Value received for upselling in the period
vi_value_received_tot	Value Received Total	FLOAT		Total value received in the period

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hat_leads

Derived entity that represents a prospecting cycle. Consolidated from one or more leads and/or accounts. First data takes precedence.

hat_leads field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_filt_end_date	Filter End Date	DATE		The end date of the record, stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The start date of the record, stripped of time
_sys_last_modifiedon	Last Modified On	DATETIME		The date of the last data modification in the platform
_sys_ssr_id	SSR ID	STRING	50	Id of the SSR document the record belongs to
crm_account_id	CRM Account ID	STRING	50	CRM account id of the lead or account
crm_addr_city	CRM Address City	STRING	150	Lead or account's city in the CRM
crm_addr_country	CRM Address Country	STRING	150	Lead or account's country in the CRM
crm_addr_postal_code	CRM Address Postal Code	STRING	150	Lead or account's postal code in the CRM
crm_addr_state	CRM Address State	STRING	150	Lead or account's state in the CRM
crm_addr_street	CRM Address Street	STRING	150	Lead or account's street in the CRM
crm_complt	CRM Completeness	FLOAT		Lead or account's completeness score based on the CRM data

hat_leads field_name	display_name	data_type	length	description
crm_complt_contact	CRM Completeness Contact	FLOAT		Lead or account's contact information completeness score based on the CRM data
crm_complt_contact_method	CRM Completeness Contact Method	FLOAT		Lead or account's contact method completeness score based on the CRM data
crm_complt_geo	CRM Completeness Geo	FLOAT		Lead or account's location completeness score based on the CRM data
crm_complt_marketing	CRM Completeness Marketing	FLOAT		Lead or account's marketing completeness score based on the CRM data
crm_contact_title	CRM Contact Title	STRING	150	Lead or account's title in the CRM
crm_createdon	CRM Created On	DATETIME		Lead or account creation date in the CRM
crm_creator_id	CRM Creator ID	STRING	50	Lead or account creator's id in the CRM
crm_custom_value_1	CRM Custom Value 1	STRING	150	Custom categorical variable
crm_custom_value_2	CRM Custom Value 2	STRING	150	Custom categorical variable
crm_custom_value_3	CRM Custom Value 3	STRING	150	Custom categorical variable
crm_deep_link	CRM Deep Link	STRING	500	Link to the lead or account in the remote system (such as Salesforce)
crm_industry	CRM Industry	STRING	150	Lead or account's industry in the CRM
crm_last_act_time	CRM Last Activity Time	DATETIME		Lead or account's last activity time in the CRM
crm_leadsource	CRM Lead Source	STRING	150	Lead or account's lead source in the CRM

hat_leads field_name	display_name	data_type	length	description
crm_name	CRM Name	STRING	500	Lead or account name in the CRM
crm_num_employees	CRM Num Employees	INTEGER		Lead or account's number of employees in the CRM
crm_owner_id	CRM Owner ID	STRING	50	Lead or account owner's id in the CRM
crm_parent_id	CRM Parent ID	STRING	50	Lead or account's parent id in the CRM
crm_status	CRM Status	STRING	150	Lead or account's status in the CRM
crm_type	CRM Type	STRING	50	Lead or account's type in the CRM
crm_weburl	CRM Weburl	STRING	150	Lead or account's URL in the CRM
trueai_addr_city	Address City	STRING	50	Lead or account's city
trueai_addr_country	Address Country	STRING	50	Lead or account's country
trueai_addr_lat	Address Lat	FLOAT		Lead or account's latitude
trueai_addr_long	Address Long	FLOAT		Lead or account's longitude
trueai_addr_postal_code	Address Postal Code	STRING	50	Lead or account's postal code
trueai_addr_rule	Address Rule	INTEGER		Lead or account's address prediction rule
trueai_addr_state	Address State	STRING	50	Lead or account's state
trueai_addr_street	Address Street	STRING	50	Lead or account's street
trueai_company_dupe_conf	Company Duplicate Confidence	FLOAT		Lead or account's company duplication confidence
trueai_company_dupe_id	Company Duplicate ID	STRING	50	Lead or account's company duplication id
trueai_company_size	Company Size	STRING	50	Lead or account's standardized company size

hat_leads field_name	display_name	data_type	length	description
trueai_company_size_rule	Company Size Rule	INTEGER		Lead or account's standardized company size prediction rule
trueai_complt	Completeness	FLOAT		Completeness score of the lead or account based on the standardized data
trueai_complt_contact	Completeness Contact	FLOAT		Contact information completeness score of the lead or account based on the standardized data
trueai_complt_contact_method	Completeness Contact Method	FLOAT		Contact method completeness score of the lead or account based on the standardized data
trueai_complt_geo	Completeness Geo	FLOAT		Location completeness score of the lead or account based on the standardized data
trueai_complt_marketing	Completeness Marketing	FLOAT		Marketing completeness score of the lead or account based on the standardized data
trueai_converted_date	Converted Date	DATETIME		Lead or account's converted date
trueai_createdon	Created On	DATETIME		Lead or account creation date
trueai_creator_id	Creator ID	STRING	50	Lead or account creator's id
trueai_dur	Duration	FLOAT		Total duration of activities performed on the lead or account
trueai_entity	Entity	STRING	50	Lead or account's entity
trueai_first_touch	First Touch	DATETIME		Date when the lead or account was first touched
trueai_industry	Industry	STRING	50	Lead or account's standardized industry
trueai_industry_conf	Industry Confidence	FLOAT		Lead or account's standardized industry prediction confidence
trueai_industry_rule	Industry Rule	INTEGER		Lead or account's standardized industry prediction rule
trueai_is_disqualified	Is Disqualified	STRING	50	Lead or account's standardized disqualification status

hat_leads

field_name	display_name	data_type	length	description
trueai_is_disqualified_conf	Is Disqualified Confidence	FLOAT		Lead or account's standardized disqualification status prediction confidence
trueai_is_master	Is Master	BOOLEAN		Boolean flag that indicates whether the lead or account is the master lead or account in its group of duplicates
trueai_last_outcome	Last Outcome	STRING	50	Lead or accounts's close date
trueai_last_touch	Last Touch	DATETIME		Date when the lead or account was last touched
trueai_lead_dupe_conf	Lead Duplicate Confidence	FLOAT		Lead or account's lead duplication confidence
trueai_lead_dupe_id	Lead Duplicate ID	STRING	50	Lead or account's lead duplication id
trueai_leadsource	Lead Source	STRING	50	Lead or account's standardized lead source
trueai_leadsource_conf	Lead Source Confidence	FLOAT		Lead or account's standardized lead source prediction confidence
trueai_leadsource_is_inbound	Lead Source Is Inbound	BOOLEAN		Boolean flag that indicates whether the lead or account's standardized lead source is inbound
trueai_leadsource_rule	Lead Source Rule	INTEGER		Lead or account's standardized lead source prediction rule
trueai_owner_id	Owner ID	STRING	50	Lead or account owner's id
trueai_probability_of_conversion	Probability of Conversion	FLOAT		Lead or account's probability of conversion
trueai_probability_of_conversion_explained_neg	Probability of Conversion Explained Negative	OBJECT	2000	Factors impacting the probability of conversion in a negative way
trueai_probability_of_conversion_explained_pos	Probability of Conversion Explained Positive	OBJECT	2000	Factors impacting the probability of conversion in a positive way

hat_leads field_name	display_name	data_type	length	description
trueai_probability_of_new_logo_win	Probability of New Logo Win	FLOAT		Lead or account's probability of new logo win
trueai_qual_bucket	Quality Bucket	STRING	50	Quality bucket based on the probability of conversion
trueai_qual_bucket_num	Quality Bucket Num	INTEGER		Quality bucket expressed as an integer from 1 to 5 based on the probability of conversion
trueai_ssr_is_master	SSR Is Master	BOOLEAN		Boolean flag that indicates whether the account is the master account in its group of duplicates taking into account whether it has revenue
trueai_title_dept	Title Department	STRING	50	Lead or account's standardized department
trueai_title_dept_conf	Title Department Confidence	FLOAT		Lead or account's standardized department prediction confidence
trueai_title_seniority	Title Seniority	STRING	50	Lead or account's standardized seniority
trueai_title_seniority_conf	Title Seniority Confidence	FLOAT		Lead or account's standardized seniority prediction confidence
trueai_vi_leadgen_value	Lead Generation Value	FLOAT		Lead or account's lead gen value

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customer_accounts

Derived entity that represents an account in a single specific post selling cycle with the appropriate TrueAI fields for that sales step.

customer_accounts field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_filt_end_date	Filter End Date	DATE		The end date of the record, stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The start date of the record, stripped of time
_sys_ssr_id	SSR ID	STRING	50	Id of the SSR document the record belongs to
crm_addr_city	CRM Address City	STRING	150	Account's city in the CRM
crm_addr_country	CRM Address Country	STRING	150	Account's country in the CRM
crm_addr_postal_code	CRM Address Postal Code	STRING	150	Account's postal code in the CRM
crm_addr_state	CRM Address State	STRING	150	Account's state in the CRM
crm_addr_street	CRM Address Street	STRING	150	Account's street in the CRM
crm_createdon	CRM Created On	DATETIME		Account creation date in the CRM
crm_creator_id	CRM Creator ID	STRING	150	Account creator's id in the CRM
crm_deep_link	CRM Deep Link	STRING	500	Link to the account in the remote system (such as Salesforce)

customer_accounts field_name	display_name	data_type	length	description
crm_industry	CRM Industry	STRING	150	Account's industry in the CRM
crm_last_act	CRM Last Activity	DATETIME		Account's last activity time in the CRM
crm_leadsource	CRM Lead Source	STRING	150	Account's lead source in the CRM
crm_name	CRM Name	STRING	500	Account's name
crm_num_employees	CRM Num Employees	INTEGER		Account's number of employees in the CRM
crm_owner_id	CRM Owner ID	STRING	150	Account owner's id in the CRM
crm_parent_id	CRM Parent ID	STRING	50	Account's parent id in the CRM
crm_type	CRM Type	STRING	150	Account's type in the CRM
trueai_addr_city	Address City	STRING	50	Account's city
trueai_addr_country	Address Country	STRING	50	Account's country
trueai_addr_lat	Address Lat	FLOAT		Account's latitude
trueai_addr_long	Address Long	FLOAT		Account's longitude
trueai_addr_state	Address State	STRING	50	Account's state
trueai_addr_street	Address Street	STRING	50	Account's street
trueai_close_date	Close Date	DATETIME		Account close date
trueai_company_size	Company Size	STRING	50	Account's standardized company size
trueai_complt	Completeness	FLOAT		Completeness score of the account based on the standardized data
trueai_createdon	Created On	DATETIME		Account creation date

customer_accounts

field_name	display_name	data_type	length	description
trueai_creator_id	Creator ID	STRING	50	Account creator's id
trueai_dur	Duration	FLOAT		Total duration of activities performed on the account
trueai_first_amt	First Amount	FLOAT		Booking amount of the first opportunity won
trueai_first_purchase	First Purchase	DATETIME		Close date of the first opportunity won
trueai_industry	Industry	STRING	50	Account's standardized industry
trueai_industry_conf	Industry Confidence	FLOAT		Account's standardized industry prediction confidence
trueai_last_amt	Last Amount	FLOAT		Booking amount of the last opportunity won
trueai_last_purchase	Last Purchase	DATETIME		Close date of the last opportunity won
trueai_leadsource	Lead Source	STRING	50	Account's standardized lead source
trueai_leadsource_conf	Lead Source Confidence	FLOAT		Account's standardized lead source prediction confidence
trueai_owner_id	Owner ID	STRING	50	Account owner's id
trueai_probability_of_next_opp	Probability of Next Opp	FLOAT		Probability of next opportunity creation
trueai_probability_of_next_opp_explained_neg	Probability of Next Opp Explained Negative	OBJECT	2000	Factors impacting the probability of next opportunity creation in a negative way
trueai_probability_of_next_opp_explained_pos	Probability of Next Opp Explained Positive	OBJECT	2000	Factors impacting the probability of next opportunity creation in a positive way
trueai_qual_bucket	Quality Bucket	STRING	50	Quality bucket based on the probability of next opportunity creation

customer_accounts

field_name	display_name	data_type	length	description
trueai_qual_bucket_num	Quality Bucket Num	INTEGER		Quality bucket expressed as an integer from 1 to 5 based on the probability of next opportunity creation
trueai_tot_amt	Total Amount	FLOAT		Sum of the booking amounts of all the opportunities won
trueai_tot_pipeline_amt	Total Pipeline Amount	FLOAT		Sum of the booking amounts of opportunities created
trueai_tot_purchases	Total Purchases	FLOAT		Number of opportunities won
trueai_vi_post_sales_value	Post Sales Value	FLOAT		Account's post-sales support value

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hr_users

HR Users file provided by the client along with any bulk overrides.

hr_users field_name	display_name	data_type	length	description
crm_user_id	CRM User ID	STRING	50	If matched with CRM data, the user id of that record
hr_addr_city	Hr Address City	STRING	50	The employee's work address
hr_addr_country	Hr Address Country	STRING	50	The employee's work address
hr_addr_postal_code	Hr Address Postal Code	STRING	50	The employee's work address
hr_addr_state	Hr Address State	STRING	50	The employee's work address
hr_addr_street	Hr Address Street	STRING	50	The employee's work address
hr_classification	Hr Classification	STRING	50	The employee classification (e.g. full-time, part-time)
hr_department	Hr Department	STRING	50	The dept of the employee - will be used to match group
hr_direct_reports	Hr Direct Reports	INTEGER		How many direct reports?
hr_division	Hr Division	STRING	50	The division of the employee - will be used to match group
hr_email	Hr Email	STRING	50	The employee's work email
hr_employee_type	Hr Employee Type	STRING	50	The type of employee
hr_first_name	Hr First Name	STRING	50	The employee's first name
hr_hire_date	Hr Hire Date	DATETIME		This field has been deprecated.
hr_id	Hr ID	STRING	50	The HRIS unique ID

hr_users field_name	display_name	data_type	length	description
hr_is_manager	Hr Is Manager	BOOLEAN		Is the employee a manager?
hr_is_remote	Hr Is Remote	BOOLEAN		Is the employee a remote worker
hr_last_name	Hr Last Name	STRING	50	The employee's last name
hr_manager_id	Hr Manager ID	STRING	50	The ID of the manager (can leave blank if Manager name is supplied instead)
hr_manager_name	Hr Manager Name	STRING	50	The NAME of the manager (can leave blank if Manager name is supplied instead)
hr_profile_url	Hr Profile URL	STRING	50	The url to a photo of the employee
hr_role	Hr Role	STRING	50	The employee's work role
hr_status	Hr Status	STRING	50	The curent status of the employee (e.g. active, terminated etc.)
hr_termination_date	Hr Termination Date	DATETIME		This field has been deprecated.
hr_time_zone	Hr Time Zone	STRING	50	The employee's time zone
hr_title	Hr Title	STRING	50	The employee's title
hr_username	Hr Username	STRING	50	The user name of the employee
trueai_ext_match_group	Ext Match Group	STRING	50	If matched with CRM data, the trueai group of that record
trueai_ext_match_user_role	Ext Match Standardized Role	STRING	50	If matched with CRM data, the trueai user role of that record
trueai_group	Group	STRING	50	Specific override field that bypasses the TrueAI engine, to set a specific group. Must match existing defined groups in system
trueai_user_role	Standardized Role	STRING	50	Specific override field that bypasses the TrueAI engine, to set a specific user role. Must match existing defined roles in classes

groups

The list of user groups.

groups field_name	display_name	data_type	length	description
_sys_doc_id	Doc ID	STRING	50	Unique group identifier
compare_within_group	Compare Within Group	BOOLEAN		Boolean flag that indicates whether to compare within group
name	Name	STRING	50	Name of the group

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ssr

The Single Sales Record (SSR): a deduplicated & consolidated record of all leads and accounts. TrueAI fields explain the sales process and overall account performance.

ssr

field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_filt_end_date	Filter End Date	DATE		The end date of the record, stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The start date of the record, stripped of time
crm_account_custom_value_1	CRM Account Custom Value 1	STRING	150	Custom categorical variable on the account
crm_account_custom_value_2	CRM Account Custom Value 2	STRING	150	Custom categorical variable on the account
crm_account_custom_value_3	CRM Account Custom Value 3	STRING	150	Custom categorical variable on the account
crm_custom_value_1	CRM Custom Value 1	STRING	150	Custom categorical variable
crm_custom_value_2	CRM Custom Value 2	STRING	150	Custom categorical variable
crm_custom_value_3	CRM Custom Value 3	STRING	150	Custom categorical variable
crm_name	CRM Name	STRING	500	Account's name
crm_owner_id	CRM Owner ID	STRING	50	Account owner's id in the CRM

ssr

field_name	display_name	data_type	length	description
crm_parent_id	CRM Parent ID	STRING	50	Account's parent id in the CRM
crm_tot_accounts	CRM Total Accounts	INTEGER		Number of accounts related to the sales process
crm_tot_act	CRM Total Activities	INTEGER		Number of activities related to the sales process
crm_tot_contacts	CRM Total Contacts	INTEGER		Number of contacts related to the sales process
crm_tot_leads	CRM Total Leads	INTEGER		Number of leads related to the sales process
crm_tot_not_linked_leads	CRM Total Not Linked Leads	INTEGER		Number of leads related to the sales process with no crm.accountid
crm_tot_opps	CRM Total Opps	INTEGER		Number of opportunities related to the sales process
crm_type	CRM Type	STRING	150	Account's type in the CRM
crm_weburl	CRM Weburl	STRING	150	Account's URL in the CRM
sales_process_account_prospecting	Sales Process Account Prospecting	BOOLEAN		Boolean flag that indicates whether or not prospecting was done on the account
sales_process_ae_did_new_logo	Sales Process AE Did New Logo	BOOLEAN		Boolean flag that indicates whether new logo selling was done by an AE
sales_process_am_did_post_selling	Sales Process AM Did Post Selling	BOOLEAN		Boolean flag that indicates whether post-sales support was done by an AM
sales_process_mgr_involved	Sales Process Mgr. Involved	BOOLEAN		Boolean flag that indicates whether manager was involved in any of the steps
sales_process_mkt_did_lead_gen	Sales Process Marketing Did Lead Gen	BOOLEAN		Boolean flag that indicates whether lead gen was done by a marketing user

ssr

field_name	display_name	data_type	length	description
sales_process_multiple_reps_per_stage	Sales Process Multiple Reps Per Stage	BOOLEAN		Boolean flag that indicates whether any of the stages involved more than one user
sales_process_new_logo_more_than_one_rep	Sales Process New Logo More Than One Rep	BOOLEAN		Boolean flag that indicates whether or not new logo selling was done by more than one user
sales_process_post_selling_more_than_one_rep	Sales Process Post Selling More Than One Rep	BOOLEAN		Boolean flag that indicates whether or not post-sales support was done by more than one user
sales_process_prospecting_end_r	Sales Process Prospecting End Rule	INTEGER		The rule used to determine the end of prospecting
sales_process_prospecting_more_than_one_rep	Sales Process Prospecting More Than One Rep	BOOLEAN		Boolean flag that indicates whether or not prospecting was done by more than one user
sales_process_sales_proc_determinable	Sales Process Sales Process Determinable	BOOLEAN		Boolean flag that indicates whether the sales process is determinable
sales_process_sales_process_handoffs	Sales Process Sales Process Handoffs	STRING	50	The handoff pattern of the sales process
sales_process_sdr_did_prospecting	Sales Process SDR Did Prospecting	BOOLEAN		Boolean flag that indicates whether prospecting was done by an SDR
trueai_account_dupe_conf	Account Duplicate Confidence	STRING	50	Account's duplication confidence
trueai_account_dupe_id	Account Duplicate ID	STRING	50	Account's duplication id
trueai_account_is_master	Account Is Master	BOOLEAN		Boolean flag that indicates whether the account is the master account in its group of duplicates

ssr

field_name	display_name	data_type	length	description
trueai_addedon	Added On	DATETIME		Start date of the first step in the sales process
trueai_addr_city	Address City	STRING	50	Record's city
trueai_addr_country	Address Country	STRING	50	Record's country
trueai_addr_lat	Address Lat	FLOAT		Record's latitude
trueai_addr_long	Address Long	FLOAT		Record's longitude
trueai_addr_postal_code	Address Postal Code	STRING	50	Record's postal code
trueai_addr_rule	Address Rule	INTEGER		Record's address prediction rule
trueai_addr_state	Address State	STRING	50	Record's state
trueai_addr_street	Address Street	STRING	50	Record's street
trueai_churned_on	Churned on	DATETIME		Date when the account churned
trueai_company_size	Company Size	STRING	50	Record's standardized company size
trueai_company_size_num	Company Size Num	INTEGER		NOT IMPLEMENTED
trueai_company_size_rule	Company Size Rule	INTEGER		Record's standardized company size prediction rule
trueai_creator_id	Creator ID	STRING	50	Creator id of the first step in the sales process
trueai_curr_acv	Curr Acv	FLOAT		NOT IMPLEMENTED
trueai_current_step	Current Step	FLOAT		Current step id
trueai_current_step_name	Current Step Name	STRING	50	Current step name

ssr field_name	display_name	data_type	length	description
trueai_first_amt	First Amount	FLOAT		Booking amount of the first opportunity won
trueai_first_purchase	First Purchase	DATETIME		Close date of the first opportunity won
trueai_first_touch	First Touch	DATETIME		First time when the record was touched
trueai_group	Group	STRING	50	Group of the owner of the last step in the sales process
trueai_industry	Industry	STRING	50	Record's standardized industry
trueai_industry_conf	Industry Confidence	FLOAT		Record's standardized industry prediction confidence
trueai_industry_rule	Industry Rule	INTEGER		Record's standardized industry prediction rule
trueai_last_outcome	Last Outcome	STRING	50	Outcome of the last step in the sales process
trueai_last_purchase	Last Purchase	DATETIME		Close date of the last opportunity won
trueai_last_touch	Last Touch	DATETIME		Last time when the record was touched
trueai_latest_amt	Latest Amount	FLOAT		Booking amount of the last opportunity won
trueai_leadsource	Lead Source	STRING	50	Record's standardized lead source
trueai_leadsource_conf	Lead Source Confidence	FLOAT		Record's standardized lead source prediction confidence
trueai_leadsource_is_inbound	Lead Source Is Inbound	BOOLEAN		Boolean flag that indicates whether the record's standardized lead source is inbound
trueai_leadsource_rule	Lead Source Rule	INTEGER		Record's standardized lead source prediction rule
trueai_owner_id	Owner ID	STRING	50	Owner id of the last step in the sales process
trueai_potential_acv	Potential Acv	FLOAT		NOT IMPLEMENTED

ssr

field_name	display_name	data_type	length	description
trueai_potential_acv_factor	Potential Acv Factor	FLOAT		NOT IMPLEMENTED
trueai_pruned_act	Pruned Activities	INTEGER		Number of activities pruned
trueai_pruned_contacts	Pruned Contacts	INTEGER		Number of contacts pruned
trueai_pruned_leads	Pruned Leads	INTEGER		Number of leads pruned
trueai_ssr_is_master	SSR Is Master	BOOLEAN		Boolean flag that indicates whether the account is the master account in its group of duplicates taking into account whether it has revenue
trueai_tot_amt	Total Amount	FLOAT		Sum of the booking amounts of all the opportunities won
trueai_tot_days	Total Days	INTEGER		Number of days since the start of the first step until the end of the last step in the sales process
trueai_tot_pipeline_amt	Total Pipeline Amount	FLOAT		Sum of the booking amounts of opportunities created
trueai_tot_purchases	Total Purchases	INTEGER		Number of opportunities won
trueai_tot_steps	Total Steps	INTEGER		Number of steps in the sales process

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ssr_history

A derived entity with an entry for each applicable sales step the SSR has entered.

Steps always follow this sequence:
Lead Gen, Untouched, Prospecting, New Logo, Post-Sales Support & Upselling. The last steps can be repeated multiple times.

Grouped by:

- _sys for system fields
- step for info about the current step
- entity for info about related entities
- opp for info about the current opportunity if New Logo, or Upselling
- stakeholder for info about the buyer personas involved in the step.

ssr_history field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_doc_id	Doc ID	STRING	50	Unique record identifier, based on the ID of the document in the remote system (such as Salesforce ID)
_sys_filt_end_date	Filter End Date	DATE		The end date of the record, stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The start date of the record, stripped of time
_sys_ssr_id	SSR ID	STRING	50	Id of the SSR document the record belongs to
account_crm_custom_value_1	Account CRM Custom Value 1	STRING	150	Custom categorical variable on the account
account_crm_custom_value_2	Account CRM Custom Value 2	STRING	150	Custom categorical variable on the account
account_crm_custom_value_3	Account CRM Custom Value 3	STRING	150	Custom categorical variable on the account
entity_account_id	Entity Account ID	STRING	50	Account id, if account already exists
entity_crm_custom_value_1	Entity CRM Custom Value 1	STRING	150	Custom categorical variable
entity_crm_custom_value_2	Entity CRM Custom Value 2	STRING	150	Custom categorical variable

ssr_history field_name	display_name	data_type	length	description
entity_crm_custom_value_3	Entity CRM Custom Value 3	STRING	150	Custom categorical variable
entity_hat_lead_recycled	Entity Hat Lead Recycled	BOOLEAN		Boolean flag that indicates whether the current step is recycled
entity_lead_id	Entity Lead ID	STRING	50	Lead id, if the prospecting object is a lead
entity_opp_id	Entity Opp ID	STRING	50	Opportunity id on selling steps, first opportunity id on steps prior to that, last opportunity id on post-sales support steps
entity_primary	Entity Primary	STRING	50	Entity of the primary object related to the step
entity_primary_crm_complt	Entity Primary CRM Completeness	FLOAT		Completeness score of the account based on the CRM data
entity_primary_doc_id	Entity Primary Doc ID	STRING	50	Unique record identifier of the primary object related to the step, based on the ID of the document in the remote system (such as Salesforce ID)
entity_primary_trueai_complt	Entity Primary Completeness	FLOAT		Completeness score of the account based on the standardized data
entity_qual_bucket	Entity Quality Bucket	STRING	50	Quality bucket based on the probability of success
entity_qual_bucket_num	Entity Quality Bucket Num	INTEGER		Quality bucket expressed as an integer from 1 to 5 based on the probability of success
opp_booking_amt	Opp Booking Amount	FLOAT		Opportunity's booking amount
opp_crm_stage	Opp CRM Stage	STRING	50	Opportunity's current CRM stage name, present in selling steps
opp_crm_type	Opp CRM Type	STRING	50	Opportunity's CRM type, present in selling steps
opp_final_stage	Opp Final Stage	STRING	50	Opportunity's current normalized stage, present in selling steps

ssr_history field_name	display_name	data_type	length	description
opp_initial_amt	Opp Initial Amount	FLOAT		Opportunity's booking amount in the first opportunity history entry, present in selling steps
opp_initial_close_date	Opp Initial Close Date	DATETIME		Opportunity's close date in the first opportunity history entry, present in selling steps
opp_late_date	Opp Late Date	DATETIME		Date when the opportunity entered the late stage, present in selling steps
opp_lost_stage	Opp Lost Stage	STRING	50	Opportunity's last normalized stage, before it was lost
opp_mid_date	Opp Mid Date	DATETIME		Date when the opportunity entered the middle stage, present in selling steps
opp_pipeline_amt	Opp Pipeline Amount	FLOAT		Pipeline amount created in step
opp_pred_booking_amt	Opp Predicted Booking Amount	FLOAT		Opportunity's predicted booking amount, present in selling steps
opp_sale_type	Opp Sale Type	STRING	50	Opportunity's sale type, present in selling steps
opp_won_amt	Opp Won Amount	FLOAT		Opportunity's value when closed, present in closed selling steps
step_end_date	Step End Date	DATETIME		End date of the step
step_end_rule	Step End Rule	INTEGER		Rule used to determine the end date of the step
step_id	Step ID	STRING	50	Id of the step, specific to every step name
step_length_in_days	Step Length In Days	INTEGER		Number of days from the step start date to end date
step_manager_act	Step Manager Activities	INTEGER		Number of activities performed during the step by a manager
step_name	Step Name	STRING	50	Name of the step
step_next_success_prob	Step Next Success Prob	FLOAT		Probability of successful outcome of the step

ssr_history field_name	display_name	data_type	length	description
step_outcome	Step Outcome	STRING	50	Outcome of the step, if end date present
step_outcome_rule	Step Outcome Rule	INTEGER		Rule used to determine the outcome of the step, if end date present
step_owner_act	Step Owner Activities	FLOAT		Number of activities performed by the owner of the step
step_owner_act_capt_lvl	Step Owner Activities Capture Level	FLOAT		act_capture_level score of the owner of the step
step_owner_dur	Step Owner Duration	FLOAT		Duration of activities performed by the owner of the step
step_owner_expect_dur	Step Owner Expected Duration	FLOAT		Expected duration of activities performed by the owner of the step
step_owner_id	Step Owner ID	STRING	50	Id of the owner of the step
step_owner_prep_factor	Step Owner Prep Factor	FLOAT		Prep factor of the owner of the step
step_owner_rule	Step Owner Rule	INTEGER		Rule used to determine the owner of the step
step_owner_user_role	Step Owner Standardized Role	STRING	50	User role of the owner of the step
step_sequence	Step Sequence	INTEGER		Ordinal number based on the position of the step in the sequence
step_start_date	Step Start Date	DATETIME		Start date of the step
step_success	Step Success	BOOLEAN		Boolean flag that indicates whether the outcome of the step was successful
step_success_prob	Step Success Prob	FLOAT		Probability of successful outcome of the step
step_users_tot	Step Users Total	INTEGER		Number of users involved in the step, based on activities and ownership

ssr_history field_name	display_name	data_type	length	description
stkhlds_all_act_count	Stakeholders All Activities Count	INTEGER		Number of activities performed during the step
stkhlds_all_act_eng_count	Stakeholders All Activities Engaged Count	INTEGER		Number of engaged activities performed during the step
stkhlds_all_adj_dur	Stakeholders All Adj Duration	FLOAT		Adjusted duration of activities performed during the step
stkhlds_all_adj_dur_rule	Stakeholders All Adj Duration Rule	INTEGER		Rule used to determine the adjusted duration of activities performed during the step
stkhlds_all_auto_email_count	Stakeholders All Automated Email Count	INTEGER		Number of automated emails performed during the step
stkhlds_all_auto_email_eng_count	Stakeholders All Automated Email Engaged Count	INTEGER		Number of engaged automated emails performed during the step
stkhlds_all_contacts_count	Stakeholders All Contacts Count	INTEGER		Number of contacts involved in the step
stkhlds_all_dur	Stakeholders All Duration	FLOAT		Duration of activities performed during the step
stkhlds_all_dur_eng	Stakeholders All Duration Engaged	FLOAT		Duration of activities performed during the step
stkhlds_all_email_count	Stakeholders All Email Count	INTEGER		Number of emails performed during the step
stkhlds_all_email_eng_count	Stakeholders All Email Engaged Count	INTEGER		Number of engaged emails performed during the step
stkhlds_all_first_act	Stakeholders All First Activities	DATETIME		Date when the first activity was performed during the step

ssr_history field_name	display_name	data_type	length	description
stkhlds_all_first_engmt	Stakeholders All First Engagement	DATETIME		Date when the first engaged activity was performed during the step
stkhlds_all_last_act	Stakeholders All Last Activity	DATETIME		Date when the last activity was performed during the step
stkhlds_all_last_engmt	Stakeholders All Last Engagement	DATETIME		Date when the last engaged activity was performed during the step
stkhlds_all_max_title_seniority	Stakeholders All Max Title Seniority	STRING	50	Highest seniority amongst all contacts of the step
stkhlds_all_meeting_count	Stakeholders All Meeting Count	INTEGER		Number of meetings performed during the step
stkhlds_all_meeting_eng_count	Stakeholders All Meeting Engaged Count	INTEGER		Number of engaged meetings performed during the step
stkhlds_all_most_common_title_dept	Stakeholders All Most Common Title Department	STRING	50	Most common department amongst all contacts of the step
stkhlds_all_most_common_title_seniority	Stakeholders All Most Common Title Seniority	STRING	50	Most common seniority amongst all contacts of the step
stkhlds_all_nd_count	Stakeholders All Non Determinable Count	INTEGER		Number of activities with unknown type performed during the step
stkhlds_all_nd_eng_count	Stakeholders All Non Determinable Engaged Count	INTEGER		Number of engaged activities with unknown type performed during the step
stkhlds_all_no_interaction_count	Stakeholders All No Interaction Count	INTEGER		Number of activities with no customer interaction performed during the step

ssr_history field_name	display_name	data_type	length	description
stkhlds_all_no_interaction_eng_count	Stakeholders All No Interaction Engaged Count	INTEGER		Number of engaged activities with no customer interaction performed during the step
stkhlds_all_phone_call_count	Stakeholders All Phone Call Count	INTEGER		Number of calls performed during the step
stkhlds_all_phone_call_eng_count	Stakeholders All Phone Call Engaged Count	INTEGER		Number of engaged calls performed during the step
stkhlds_all_social_media_count	Stakeholders All Social Media Count	INTEGER		Number of social media activities performed during the step
stkhlds_all_social_media_eng_count	Stakeholders All Social Media Engaged Count	INTEGER		Number of engaged social media activities performed during the step
stkhlds_all_unique_title_depts	Stakeholders All Unique Title Depts	INTEGER		Unique departments amongst all contacts of the step
stkhlds_all_unique_title_seniorities	Stakeholders All Unique Title Seniorities	INTEGER		Unique seniority in all contacts of the step
stkhlds_primary_contact_act_count	Stakeholders Primary Contact Activities Count	INTEGER		Number of activities performed by the primary stakeholder during the step
stkhlds_primary_contact_act_eng_count	Stakeholders Primary Contact Activities Engaged Count	INTEGER		Number of engaged activities performed by the primary stakeholder during the step
stkhlds_primary_contact_dur	Stakeholders Primary Contact Duration	FLOAT		Duration of activities performed by the primary contact of the step during the step
stkhlds_primary_contact_eng_dur	Stakeholders Primary Contact Engaged Duration	FLOAT		Duration of activities performed by the primary contact of the step during the step

ssr_history field_name	display_name	data_type	length	description
stkhlds_primary_contact_first_act	Stakeholders Primary Contact First Activities	DATETIME		Date when the first activity by the primary contact was performed during the step
stkhlds_primary_contact_first_engmt	Stakeholders Primary Contact First Engagement	DATETIME		Date when the first engaged activity by the primary contact was performed during the step
stkhlds_primary_contact_is_lead	Stakeholders Primary Contact Is Lead	BOOLEAN		Boolean flag that indicates whether the primary contact of the step is a lead or contact
stkhlds_primary_contact_last_act	Stakeholders Primary Contact Last Activity	DATETIME		Date when the last activity by the primary contact was performed during the step
stkhlds_primary_contact_last_engmt	Stakeholders Primary Contact Last Engagement	DATETIME		Date when the last engaged activity by the primary contact was performed during the step
stkhlds_primary_contact_title_dept	Stakeholders Primary Contact Title Department	STRING	50	Department of the primary contact of the step
stkhlds_primary_contact_title_seniority	Stakeholders Primary Contact Title Seniority	STRING	50	Seniority of the primary contact of the step
stkhlds_primary_entity_id	Stakeholders Primary Entity ID	STRING	50	Id of the primary contact of the step
stkhlds_secondary_contact_act_count	Stakeholders Secondary Contact Activities Count	INTEGER		Number of activities performed by the secondary stakeholder during the step
stkhlds_secondary_contact_act_eng_count	Stakeholders Secondary Contact Activities Engaged Count	INTEGER		Number of engaged activities performed by the secondary stakeholder during the step
stkhlds_secondary_contact_dur	Stakeholders Secondary Contact Duration	FLOAT		Duration of activities performed by the secondary contact of the step during the step

ssr_history field_name	display_name	data_type	length	description
stkhlds_secondary_contact_eng_dur	Stakeholders Secondary Contact Engaged Duration	FLOAT		Duration of activities performed by the secondary contact of the step during the step
stkhlds_secondary_contact_first_act	Stakeholders Secondary Contact First Activities	DATETIME		Date when the first activity by the secondary contact was performed during the step
stkhlds_secondary_contact_first_engmt	Stakeholders Secondary Contact First Engagement	DATETIME		Date when the first engaged activity by the secondary contact was performed during the step
stkhlds_secondary_contact_is_lead	Stakeholders Secondary Contact Is Lead	BOOLEAN		Boolean flag that indicates whether the secondary contact of the step is a lead or contact
stkhlds_secondary_contact_last_act	Stakeholders Secondary Contact Last Activity	DATETIME		Date when the last activity by the secondary contact was performed during the step
stkhlds_secondary_contact_last_engmt	Stakeholders Secondary Contact Last Engagement	DATETIME		Date when the last engaged activity by the secondary contact was performed during the step
stkhlds_secondary_contact_title_dept	Stakeholders Secondary Contact Title Department	STRING	50	Department of the secondary contact of the step
stkhlds_secondary_contact_title_seniority	Stakeholders Secondary Contact Title Seniority	STRING	50	Seniority of the secondary contact of the step
stkhlds_secondary_entity_id	Stakeholders Secondary Entity ID	STRING	50	Id of the secondary contact of the step
vi_value_created	Value Created	FLOAT		Value created during the step

ssr_history field_name	display_name	data_type	length	description
vi_value_delivered	Value Delivered	FLOAT		Value delivered at the end of the step

companies_history

Information about this API feed's specific company over time and quality metrics. A new entry is generated upon each processing cycle, but is not retroactive.

companies_history field_name	display_name	data_type	length	description
_sys_asof	As of Date	DATE		The date of the last data request from the platform
_sys_co_id	Company ID	STRING	50	The Cien company ID
_sys_doc_id	Doc ID	STRING	50	Unique record identifier
_sys_filt_end_date	Filter End Date	DATE		The end date of the record, stripped of time
_sys_filt_start_date	Filter Start Date	DATE		The start date of the record, stripped of time
_sys_last_modifiedon	Last Modified On	DATETIME		The date of the last data modification in the platform
_sys_processed_asof	Processed As of Date	DATETIME		The date of running the export
company_currency	Company Currency	STRING	50	Company's currency
company_email_suffix	Company Email Suffix	STRING	50	Company's email suffix
company_entity_counts	Company Entity Counts	OBJECT	10000	Counts of records in each collection
company_logo	Company Logo	STRING	50	Company's logo URL
company_name	Company Name	STRING	50	Company name
company_notes	Company Notes	STRING	50	List of notes related to the company
di_amt_won_last12months	Amount Won Last12months	FLOAT		Sum of booking amounts of opportunities won in the past 12 months
di_pred_new_logo_attempts	Predicted New Logo Attempts	INTEGER		Number of datapoints used to determine the R2 score of the probability of new logo win

companies_history field_name	display_name	data_type	length	description
di_pred_new_logo_auc	Predicted New Logo AUC	FLOAT		AUC score of the probability of new logo win
di_pred_new_logo_avg_p_val	Predicted New Logo Avg. P Val	FLOAT		Average predicted probability of new logo win
di_pred_new_logo_end_date	Predicted New Logo End Date	DATETIME		End of the period used to compute the R2 score of the probability of new logo win
di_pred_new_logo_factor_info	Predicted New Logo Factor Info	OBJECT	200000	This field has been deprecated.
di_pred_new_logo_factors_info	Predicted New Logo Factors Info	OBJECT	200000	Factors impacting the probability of new logo win
di_pred_new_logo_model_was_reapplied	Predicted New Logo Model Was Reapplied	BOOLEAN		This field has been deprecated.
di_pred_new_logo_model_was_retrained	Predicted New Logo Model Was Retrained	BOOLEAN		This field has been deprecated.
di_pred_new_logo_r2	Predicted New Logo R2	FLOAT		R2 score of the probability of new logo win
di_pred_new_logo_r2_data	Predicted New Logo R2 Data	OBJECT	2000	Coordinates data used to determine the R2 score of the probability of new logo win
di_pred_new_logo_start_date	Predicted New Logo Start Date	DATETIME		Start of the period used to compute the R2 score of the probability of new logo win
di_pred_new_logo_successes	Predicted New Logo Successes	INTEGER		Number of successful outcomes in the sample used to determine the R2 score of the probability of new logo win
di_pred_post_sales_attempts	Predicted Post Sales Attempts	INTEGER		Number of datapoints used to determine the R2 score of the probability of next opportunity creation
di_pred_post_sales_auc	Predicted Post Sales AUC	FLOAT		AUC score of the probability of next opportunity creation

companies_history field_name	display_name	data_type	length	description
di_pred_post_sales_avg_p_val	Predicted Post Sales Avg. P Val	FLOAT		Average predicted probability of next opportunity creation
di_pred_post_sales_end_date	Predicted Post Sales End Date	DATETIME		End of the period used to compute the R2 score of the probability of next opportunity creation
di_pred_post_sales_factor_info	Predicted Post Sales Factor Info	OBJECT	200000	This field has been deprecated.
di_pred_post_sales_factors_info	Predicted Post Sales Factors Info	OBJECT	200000	Factors impacting the probability of next opportunity creation
di_pred_post_sales_model_reset_on	Predicted Post Sales Model Reset on	DATETIME		Date when the probability of next opportunity creation model was last trained
di_pred_post_sales_model_was_reapplied	Predicted Post Sales Model Was Reapplied	BOOLEAN		This field has been deprecated.
di_pred_post_sales_model_was_retrained	Predicted Post Sales Model Was Retrained	BOOLEAN		This field has been deprecated.
di_pred_post_sales_qual_bucket_tiers	Predicted Post Sales Quality Bucket Tiers	OBJECT	2000	Tiers for the probability of next opportunity creation prediction buckets
di_pred_post_sales_r2	Predicted Post Sales R2	FLOAT		R2 score of the probability of next opportunity creation
di_pred_post_sales_r2_data	Predicted Post Sales R2 Data	OBJECT	2000	Coordinates data used to determine the R2 score of the probability of next opportunity creation
di_pred_post_sales_start_date	Predicted Post Sales Start Date	DATETIME		Start of the period used to compute the R2 score of the probability of next opportunity creation
di_pred_post_sales_successes	Predicted Post Sales Successes	INTEGER		Number of successful outcomes in the sample used to determine the R2 score of the probability of next opportunity creation

companies_history field_name	display_name	data_type	length	description
di_pred_post_sales_training_date	Predicted Post Sales Training Date	DATETIME		This field has been deprecated.
di_pred_post_sales_training_score	Predicted Post Sales Training Score	FLOAT		Average AUC score of the probability of next opportunity creation when training
di_pred_post_sales_validation_score	Predicted Post Sales Validation Score	FLOAT		Average AUC score of the probability of next opportunity creation on the validation set
di_pred_prospecting_attempts	Predicted Prospecting Attempts	INTEGER		Number of datapoints used to determine the R2 score of the probability of conversion
di_pred_prospecting_auc	Predicted Prospecting AUC	FLOAT		AUC score of the probability of conversion
di_pred_prospecting_avg_p_val	Predicted Prospecting Avg. P Val	FLOAT		Average predicted probability of conversion
di_pred_prospecting_end_date	Predicted Prospecting End Date	DATETIME		End of the period used to compute the R2 score of the probability of conversion
di_pred_prospecting_factor_info	Predicted Prospecting Factor Info	OBJECT	200000	This field has been deprecated.
di_pred_prospecting_factors_info	Predicted Prospecting Factors Info	OBJECT	200000	Factors impacting the probability of conversion
di_pred_prospecting_model_reset_on	Predicted Prospecting Model Reset on	DATETIME		Date when the probability of conversion model was last trained
di_pred_prospecting_model_was_reapplied	Predicted Prospecting Model Was Reapplied	BOOLEAN		This field has been deprecated.

companies_history

field_name	display_name	data_type	length	description
di_pred_prospecting_model_was_retrained	Predicted Prospecting Model Was Retrained	BOOLEAN		This field has been deprecated.
di_pred_prospecting_qual_bucket_tiers	Predicted Prospecting Quality Bucket Tiers	OBJECT	2000	Tiers for the probability of conversion prediction buckets
di_pred_prospecting_r2	Predicted Prospecting R2	FLOAT		R2 score of the probability of conversion
di_pred_prospecting_r2_data	Predicted Prospecting R2 Data	OBJECT	2000	Coordinates data used to determine the R2 score of the probability of conversion
di_pred_prospecting_start_date	Predicted Prospecting Start Date	DATETIME		Start of the period used to compute the R2 score of the probability of conversion
di_pred_prospecting_successes	Predicted Prospecting Successes	INTEGER		Number of successful outcomes in the sample used to determine the R2 score of the probability of conversion
di_pred_prospecting_training_date	Predicted Prospecting Training Date	DATETIME		This field has been deprecated.
di_pred_prospecting_training_score	Predicted Prospecting Training Score	FLOAT		Average AUC score of the probability of conversion when training
di_pred_prospecting_validation_score	Predicted Prospecting Validation Score	FLOAT		Average AUC score of the probability of conversion on the validation set
di_pred_selling_model_reset_on	Predicted Selling Model Reset on	DATETIME		Date when the probability of opportunity win model was last trained
di_pred_selling_model_was_reapplied	Predicted Selling Model Was Reapplied	BOOLEAN		This field has been deprecated.

companies_history field_name	display_name	data_type	length	description
di_pred_selling_model_was_retrained	Predicted Selling Model Was Retrained	BOOLEAN		This field has been deprecated.
di_pred_selling_new_logo_qual_bucket_tiers	Predicted Selling New Logo Quality Bucket Tiers	OBJECT	2000	Tiers for the probability of new logo opportunity win prediction buckets
di_pred_selling_qual_bucket_tiers	Predicted Selling Quality Bucket Tiers	OBJECT	2000	This field has been deprecated.
di_pred_selling_training_date	Predicted Selling Training Date	DATETIME		This field has been deprecated.
di_pred_selling_training_score	Predicted Selling Training Score	FLOAT		Average AUC score of the probability of opportunity win when training
di_pred_selling_upselling_qual_bucket_tiers	Predicted Selling Upselling Quality Bucket Tiers	OBJECT	2000	Tiers for the probability of upselling opportunity win prediction buckets
di_pred_selling_validation_score	Predicted Selling Validation Score	FLOAT		Average AUC score of the probability of opportunity win on the validation set
di_pred_upselling_attempts	Predicted Upselling Attempts	INTEGER		Number of datapoints used to determine the R2 score of the probability of upsell win
di_pred_upselling_auc	Predicted Upselling AUC	FLOAT		AUC score of the probability of upsell win
di_pred_upselling_avg_p_val	Predicted Upselling Avg. P Val	FLOAT		Average predicted probability of upsell win
di_pred_upselling_end_date	Predicted Upselling End Date	DATETIME		End of the period used to compute the R2 score of the probability of upsell win
di_pred_upselling_factor_info	Predicted Upselling Factor Info	OBJECT	200000	This field has been deprecated.

companies_history field_name	display_name	data_type	length	description
di_pred_upselling_factors_info	Predicted Upselling Factors Info	OBJECT	200000	Factors impacting the probability of upsell win
di_pred_upselling_model_was_reapplied	Predicted Upselling Model Was Reapplied	BOOLEAN		This field has been deprecated.
di_pred_upselling_model_was_retrained	Predicted Upselling Model Was Retrained	BOOLEAN		This field has been deprecated.
di_pred_upselling_r2	Predicted Upselling R2	FLOAT		R2 score of the probability of upsell win
di_pred_upselling_r2_data	Predicted Upselling R2 Data	OBJECT	2000	Coordinates data used to determine the R2 score of the probability of upsell win
di_pred_upselling_start_date	Predicted Upselling Start Date	DATETIME		Start of the period used to compute the R2 score of the probability of upsell win
di_pred_upselling_successes	Predicted Upselling Successes	INTEGER		Number of successful outcomes in the sample used to determine the R2 score of the probability of upsell win
processing_all_last_attempt	Processing All Last Attempt	DATETIME		Date of last attempt to run the company's processing
processing_all_last_success	Processing All Last Success	DATETIME		Date of last successful attempt to run the company's processing
processing_all_last_success_time_sec	Processing All Last Success Time Sec	FLOAT		Time in seconds it took to run the company's processing
processing_api_export_last_attempt	Processing Api Export Last Attempt	DATETIME		Date of last attempt to run the company's API exports
processing_api_export_last_success	Processing Api Export Last Success	DATETIME		Date of last successful attempt to run the company's API exports

companies_history field_name	display_name	data_type	length	description
processing_api_export_last_success_time_sec	Processing Api Export Last Success Time Sec	FLOAT		Time in seconds it took to run the company's API exports
processing_dedupe_last_attempt	Processing Dedupe Last Attempt	DATETIME		Date of last attempt to run the company's deduplication
processing_dedupe_last_success	Processing Dedupe Last Success	DATETIME		Date of last successful attempt to run the company's deduplication
processing_dedupe_last_success_time_sec	Processing Dedupe Last Success Time Sec	FLOAT		Time in seconds it took to run the company's deduplication
processing_geocode_last_attempt	Processing Geocode Last Attempt	DATETIME		Date of last attempt to run the company's geocoder
processing_geocode_last_success	Processing Geocode Last Success	DATETIME		Date of last successful attempt to run the company's geocoder
processing_geocode_last_success_time_sec	Processing Geocode Last Success Time Sec	FLOAT		Time in seconds it took to run the company's geocoder
processing_max_last_modifiedon_activities	Processing Max Last Modified On Activities	DATETIME		Latest system modstamp date on activities
processing_max_last_modifiedon_opp_histories	Processing Max Last Modified On Opp Histories	DATETIME		Latest system modstamp date on opp_histories
processing_max_last_modifiedon_opps	Processing Max Last Modified On Opps	DATETIME		Latest system modstamp date on opps

companies_history field_name	display_name	data_type	length	description
processing_max_last_modifiedon_users	Processing Max Last Modified On Users	DATETIME		Latest system modstamp date on users
processing_post_ssr_ml_last_attempt	Processing Post SSR ML Last Attempt	DATETIME		Date of last attempt to run the company's post SSR job
processing_post_ssr_ml_last_success	Processing Post SSR ML Last Success	DATETIME		Date of last successful attempt to run the company's post SSR job
processing_post_ssr_ml_last_success_time_sec	Processing Post SSR ML Last Success Time Sec	FLOAT		Time in seconds it took to run the company's post SSR job
processing_pre_ssr_ml_last_attempt	Processing Pre SSR ML Last Attempt	DATETIME		Date of last attempt to run the company's pre SSR job
processing_pre_ssr_ml_last_success	Processing Pre SSR ML Last Success	DATETIME		Date of last successful attempt to run the company's pre SSR job
processing_pre_ssr_ml_last_success_time_sec	Processing Pre SSR ML Last Success Time Sec	FLOAT		Time in seconds it took to run the company's pre SSR job
processing_sync_last_attempt	Processing Sync Last Attempt	DATETIME		Date of last attempt to run the company's sync
processing_sync_last_success	Processing Sync Last Success	DATETIME		Date of last successful attempt to run the company's sync
processing_sync_last_success_time_sec	Processing Sync Last Success Time Sec	FLOAT		Time in seconds it took to run the company's sync
processing_transform_last_attempt	Processing Transform Last Attempt	DATETIME		Date of last attempt to run the company's raw transform

companies_history field_name	display_name	data_type	length	description
processing_transform_last_success	Processing Transform Last Success	DATETIME		Date of last successful attempt to run the company's raw transform
processing_transform_last_success_time_sec	Processing Transform Last Success Time Sec	FLOAT		Time in seconds it took to run the company's raw transform
reference_date	Reference Date	DATE		The reference date used as benchmark for the calculations
users	Users	INTEGER		Number of users
users_active	Users Active	INTEGER		Number of active users
users_sales	Users Sales	INTEGER		Number of sales users
vi_value_created_last12months	Value Created Last12months	FLOAT		Value created in the past 12 months

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CLASSES

metadata_classes

The list of available classes (categorical values) that the different trueai models can output as part of the data standardization. The model name typically corresponds to the same field name with a `trueai_` prefix.

ND = Non determinable - denotes missing or ambiguous input data which resulted in a non determinable classification.

metadata_classes model	label
company_size	1,001-5,000 employees
company_size	1-10 employees
company_size	10,001+ employees
company_size	11-50 employees
company_size	201-500 employees
company_size	5,001-10,000 employees
company_size	501-1,000 employees
company_size	51-200 employees
company_size	ND
createdfrom	accounts
createdfrom	leads
engaged	Engaged
engaged	ND
engaged	Not Engaged
industry	Agriculture
industry	Apparel

metadata_classes model	label
industry	Automotive
industry	Banking
industry	Biotechnology
industry	Chemicals
industry	Communications
industry	Construction
industry	Consulting
industry	Education
industry	Electronics
industry	Energy
industry	Engineering
industry	Entertainment
industry	Environmental
industry	Finance
industry	Food & Beverage
industry	Government
industry	Healthcare
industry	Hospitality
industry	Insurance
industry	Machinery
industry	Manufacturing

metadata_classes model	label
industry	Media
industry	Mining & Minerals
industry	ND
industry	Non Profit
industry	Other
industry	Recreation
industry	Retail
industry	Services
industry	Shipping
industry	Technology
industry	Telecommunications
industry	Transportation
industry	Utilities
interaction_purpose	Internal
interaction_purpose	New Logo Selling
interaction_purpose	Post Sales Support
interaction_purpose	Prospecting
interaction_purpose	Upselling
interaction_type	Automated Email
interaction_type	Call
interaction_type	Email

metadata_classes model	label
interaction_type	Meeting
interaction_type	ND
interaction_type	No Interaction
interaction_type	Social Media
is_disqualified	Disqualified
is_disqualified	ND
is_disqualified	Not Disqualified
leadsource	Channel/Partner
leadsource	Content Marketing
leadsource	Digital Ads
leadsource	Direct Mail
leadsource	Email Marketing
leadsource	Event/Tradeshow
leadsource	Inbound Request
leadsource	List Upload
leadsource	Live Chat
leadsource	ND
leadsource	Offline Campaigns
leadsource	Other
leadsource	Outbound Call
leadsource	PR

metadata_classes model	label
leadsource	Paid Search
leadsource	Product Trial
leadsource	Referral
leadsource	Rep Lead Gen
leadsource	Review Site
leadsource	SEO
leadsource	Social Media
leadsource	Webinar
leadsource	Website
names	Account Executive
names	Account Manager
names	Automated Processes
names	CEO/General Manager
names	Inbound Rep
names	Marketing Leader
names	Marketing Staff
names	ND
names	Other Executive
names	Other User
names	Sales Development Rep
names	Sales Engineer

metadata_classes model	label
names	Sales Executive
names	Sales Manager
names	Sales Ops
names	Sales Rep - Other
names	Sales Rep - Other 2
names	Sales Rep - Other 3
names	Sales Rep - Other 4
names	Sales Rep - Other 5
names	Support Staff
normalized_stage	Closed Lost
normalized_stage	Closed Won
normalized_stage	Early
normalized_stage	Late
normalized_stage	Mid
normalized_stage	Prospecting
perf_ramping_status	Ramped
perf_ramping_status	Ramping
qtly_performance_tier	Overperformer
qtly_performance_tier	Performer
qtly_performance_tier	Ramping
qtly_performance_tier	Underperformer

metadata_classes model	label
qual_bucket	High
qual_bucket	Highest
qual_bucket	Low
qual_bucket	Lowest
qual_bucket	Mid
relatedto_entity	accounts
relatedto_entity	leads
relatedto_entity	opps
role	Account Executive
role	Account Manager
role	Automated Processes
role	CEO/General Manager
role	Inbound Rep
role	Marketing Leader
role	Marketing Staff
role	ND
role	Other Executive
role	Other User
role	Sales Development Rep
role	Sales Engineer
role	Sales Executive

metadata_classes model	label
role	Sales Manager
role	Sales Ops
role	Sales Rep - Other
role	Sales Rep - Other 2
role	Sales Rep - Other 3
role	Sales Rep - Other 4
role	Sales Rep - Other 5
role	Support Staff
sale_type	ND
sale_type	New Logo Sale
sale_type	Renewal
sale_type	Upsell
step_id	1
step_id	2
step_id	3
step_id	4
step_id	5
step_id	6
step_id	7
step_id	8
step_name	Lead Gen

metadata_classes model	label
step_name	New Logo Order
step_name	New Logo Selling
step_name	Post Sales Support
step_name	Prospecting
step_name	Untouched
step_name	Upselling
step_name	Upselling Order
step_outcome	Abandoned
step_outcome	Churned
step_outcome	Closed Lost
step_outcome	Closed Won
step_outcome	Converted
step_outcome	Disqualified
step_outcome	Ignored
step_outcome	Order Placed
step_outcome	Prospecting
step_outcome	Started Upselling
step_outcome	Untouched
title	Account Executive
title	Account Manager
title	Automated Processes

metadata_classes model	label
title	CEO/General Manager
title	Inbound Rep
title	Marketing Leader
title	Marketing Staff
title	ND
title	Other Executive
title	Other User
title	Sales Development Rep
title	Sales Engineer
title	Sales Executive
title	Sales Manager
title	Sales Ops
title	Sales Rep - Other
title	Sales Rep - Other 2
title	Sales Rep - Other 3
title	Sales Rep - Other 4
title	Sales Rep - Other 5
title	Support Staff
title_function	Accounting/Finance
title_function	Consultant
title_function	Customer Support

metadata_classes model	label
title_function	Education
title_function	General Administrative
title_function	Human Resources
title_function	Information Systems/IT
title_function	Legal/Compliance/Government
title_function	Marketing
title_function	ND
title_function	Operations
title_function	Other
title_function	Procurement
title_function	Product Development/Engineering
title_function	Sales/Business Development
title_level	Assistant
title_level	Business Unit Leader
title_level	Executive
title_level	Individual Contributor
title_level	Middle Manager
title_level	ND
title_level	Senior Executive
trueai_user_role_dept	MKT
trueai_user_role_dept	MKT

metadata_classes model	label
trueai_user_role_dept	MKT
trueai_user_role_dept	ND
trueai_user_role_dept	OPS
trueai_user_role_dept	OTHER DEPTS
trueai_user_role_dept	OTHER DEPTS
trueai_user_role_dept	OTHER DEPTS
trueai_user_role_dept	SALES
trueai_user_role_dept	SALES
trueai_user_role_dept	SALES
trueai_user_role_dept	SALES
trueai_user_role_dept	SALES
trueai_user_role_dept	SALES
trueai_user_role_dept	SALES
trueai_user_role_dept	SALES
trueai_user_role_dept	SALES
trueai_user_role_dept	SALES
trueai_user_role_dept	SALES
trueai_user_role_dept	SALES
trueai_user_role_dept	SUPPORT
user_behavior	Account Executive
user_behavior	Account Manager

metadata_classes model	label
user_behavior	Marketing Staff
user_behavior	ND
user_behavior	Sales Development Rep
user_behavior	Sales Executive
user_behavior	Sales Manager
user_role	Account Executive
user_role	Account Manager
user_role	Automated Processes
user_role	CEO/General Manager
user_role	Inbound Rep
user_role	Marketing Leader
user_role	Marketing Staff
user_role	ND
user_role	Other Executive
user_role	Other User
user_role	Sales Development Rep
user_role	Sales Engineer
user_role	Sales Executive
user_role	Sales Manager
user_role	Sales Ops
user_role	Sales Rep - Other

metadata_classes model	label
user_role	Sales Rep - Other 2
user_role	Sales Rep - Other 3
user_role	Sales Rep - Other 4
user_role	Sales Rep - Other 5
user_role	Support Staff
user_role_function	AE
user_role_function	AE
user_role_function	AE
user_role_function	AE
user_role_function	AE
user_role_function	AE
user_role_function	AM
user_role_function	MGMT
user_role_function	MGMT
user_role_function	MGMT
user_role_function	MGMT
user_role_function	MGMT
user_role_function	MKT
user_role_function	ND
user_role_function	OTHER ROLES
user_role_function	OTHER ROLES

metadata_classes model	label
user_role_function	OTHER ROLES
user_role_function	OTHER ROLES
user_role_function	OTHER ROLES
user_role_function	SDR
user_role_function	SDR

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RULES

rule_list

The rule codes and descriptions for the platform, primarily related to how the SSR history file is organized.

rule_list _sys_docid	description	model	rule_name
1	Lead CRM owner becomes the owner	LeadsOwnerid	OWNERSHIP_LEADS_CRM_OWNER
2	Selling started at or after the CRM opp creation date, so the CRM creator of the opp becomes the owner	LeadsOwnerid	OWNERSHIP_LEADS_CRM_OPP_CREATOR_SELLING_STARTED_AT_OR_AFTER_OPP_CREATION
3	Lead owner overridden by owner of most activities	LeadsOwnerid	OWNERSHIP_LEADS_CRM_OWNER_OVERRIDDEN_BY_ACT_COUNT
4	Account CRM owner becomes the owner	AccountsOwnerid	OWNERSHIP_ACCOUNTS_CRM_OWNER
5	Selling started at or after the CRM opp creation date, so the CRM creator of the opp becomes the owner	AccountsOwnerid	OWNERSHIP_ACCOUNTS_CRM_OPP_CREATOR_SELLING_STARTED_AT_OR_AFTER_OPP_CREATION
6	Account owner overridden by owner of most activities	AccountsOwnerid	OWNERSHIP_ACCOUNTS_CRM_OWNER_OVERRIDDEN_BY_ACT_COUNT
7	Opp CRM owner becomes the owner	OppsOwnerid	OWNERSHIP_OPPS_CRM_OWNER
8	Opp ownership changed in the late opp history stages, the creator of opp history stages becomes the owner	OppsOwnerid	OWNERSHIP_OPPS_OWNER_FROM_OPP_HISTORY
9	Lead createdon becomes the end date	LeadsCreatedon	END_LEADS_CRM_CREATEDON
10	Account createdon becomes the end date	AccountsCreatedon	END_ACCOUNTS_CRM_CREATEDON
11	Opps present before account createdon, first opp createdon becomes the end date	AccountsCreatedon	END_ACCOUNTS_FIRST_OPPS_CREATEDON

rule_list _sys_docid	description	model	rule_name
12	Contacts present before account createdon, first contact createdon becomes the end date	AccountsCreatedon	END_ACCOUNTS_FIRST_CONTACTS_CREATEDON
13	Opp close date earlier than createdon, move createdon back	OppsCreatedon	END_OPPS_CLOSED_ON_EARLER_THAN_CREATEDON
14	Opp CRM createdon becomes the created date	OppsCreatedon	END_OPPS_CRM_CREATEDON
15	Opp history stages present before the createdon, move createdon back	OppsCreatedon	END_OPPS_FIRST_HISTORY_STAGE
16	Opp creator is the creator in th CRM	OppsCreatorid	CREATOR_OPPS_CRM_CREATORID
17	Opps creator is the owner of the hatlead	OppsCreatorid	CREATOR_OPPS_HATLEAD_OWNERID
18	Lead is converted, close date is converted_date	LeadsCloseDate	END_LEADS_CRM_CONVERTED
19	Lead is disqualified, close date is last touched date if touched, and createdon if not, adding 30 days if only one touch to have > 0 prospecting days	LeadsCloseDate	END_LEADS_DISQUALIFIED
20	Lead is ignored: no activity within creation date + 180 days, close date is createdon + 180 days	LeadsCloseDate	END_LEADS_NO_ACTIVITY_RECORDED_IN_CREATION_PLUS_180_DAYS
21	Lead is abandoned: no further activity within last touch + 150 days, close date is last touch + 150 days	LeadsCloseDate	END_LEADS_NO_MORE_ACTIVITES_DETECTED_IN_150_DAYS
22	Lead is still open, close date is None	LeadsCloseDate	END_LEADS_STILL_OPEN
23	Account is converted, close date is converted_date	AccountsCloseDate	END_ACCOUNTS_CRM_CONVERTED
24	Account is ignored: no activity within creation date + 180 days, close date is createdon + 180 days	AccountsCloseDate	END_ACCOUNTS_NO_ACTIVITY_RECORDED_IN_CREATION_PLUS_180_DAYS

rule_list _sys_docid	description	model	rule_name
25	Account is abandoned: no further activity within last touch + 150 days, close date is last touch + 150 days	AccountsCloseDate	END_ACCOUNTS_NO_MORE_ACTIVITES_DETECTED_IN_150_DAYS
26	Account is still open, close date is None	AccountsCloseDate	END_ACCOUNTS_STILL_OPEN
27	Opp is CRM closed: is_closed is True and close date < asof, returning crm.close_date	OppsCloseDate	END_OPPS_CRM_CLOSED
28	Opps is still open in CRM, close date is None	OppsCloseDate	END_OPPS_NOT_CLOSED
29	Opps is closed in the CRM but the close date is in the future, so the opp remains open asof now, close date is None	OppsCloseDate	END_OPPS_CLOSE_DATE_IN_THE_FUTURE
30	Lead is a not a hatlead, returning None	LeadsFirstTouch	END_LEADS_NOT_HATLEAD
31	First touch is performedon of the first activity	LeadsFirstTouch	END_LEADS_FIRST_ACTIVITY_RECORDED
32	No activities but lead converted, returning createdon	LeadsFirstTouch	END_LEADS_NO_ACTIVITIES_BUT_CONVERTED
33	No activities but lead disqualified, returning createdon	LeadsFirstTouch	END_LEADS_NO_ACTIVITIES_BUT_DISQUALIFIED
34	No activities and lead is not converted nor disqualified, therefore untouched	LeadsFirstTouch	END_LEADS_UNTOUCHED
35	No activities but crm last activity time present, user middle between createdon and last activity time as first touch	LeadsFirstTouch	END_LEADS_NO_ACTIVITES_USE_MIDDLE_BETWEEN_CREATED_AND_CRM_LAST_ACTIVITY
36	Account is a not a hatlead, returning None	AccountsFirstTouch	END_ACCOUNTS_NOT_HATLEAD
37	First touch is performedon of the first activity	AccountsFirstTouch	END_ACCOUNTS_FIRST_ACTIVITY_RECORDED

rule_list _sys_docid	description	model	rule_name
38	No activities but account converted, returning createdon	AccountsFirstTouch	END_ACCOUNTS_NO_ACTIVITIES_BUT_CONVERTED
39	No activities and account is not converted nor disqualified, therefore untouched	AccountsFirstTouch	END_ACCOUNTS_UNTOUCHED
40	No activities but crm last activity time present, user middle between createdon and last activity time as first touch	AccountsFirstTouch	END_ACCOUNTS_NO_ACTIVITES_USE_MIDDLE_BETWEEN_CREATED_AND_CRM_LAST_ACTIVITY
41	Lead is a not a hatlead, returning None	LeadsLastTouch	END_LEADS_NOT_HATLEAD
42	Last touch is performedon of the last activity	LeadsLastTouch	END_LEADS_LAST_ACTIVITY_RECORDED
43	No activities but lead converted, returning createdon	LeadsLastTouch	END_LEADS_NO_ACTIVITIES_BUT_CONVERTED
44	No activities but lead disqualified, returning createdon	LeadsLastTouch	END_LEADS_NO_ACTIVITIES_BUT_DISQUALIFIED
45	No activities and lead is not converted nor disqualified, therefore untouched	LeadsLastTouch	END_LEADS_UNTOUCHED
46	No activities but crm last activity time present, user middle last activity time as last touch	LeadsLastTouch	END_LEADS_NO_ACTIVITES_USE_CRM_LAST_ACTIVITY
47	Account is a not a hatlead, returning None	AccountsLastTouch	END_ACCOUNTS_NOT_HATLEAD
48	Last touch is performedon of the last activity	AccountsLastTouch	END_ACCOUNTS_LAST_ACTIVITY_RECORDED
49	No activities but account converted, returning createdon	AccountsLastTouch	END_ACCOUNTS_NO_ACTIVITIES_BUT_CONVERTED
50	No activities but account disqualified, returning createdon	AccountsLastTouch	END_ACCOUNTS_NO_ACTIVITIES_BUT_DISQUALIFIED

rule_list _sys_docid	description	model	rule_name
51	No activities and account is not converted nor disqualified, therefore untouched	AccountsLastTouch	END_ACCOUNTS_UNTOUCHED
52	No activities but crm last activity time present, user middle last activity time as last touch	AccountsLastTouch	END_ACCOUNTS_NO_ACTIVITES_USE_CRM_LAST_ACTIVITY
53	Lead is a contact, not lead, converted date is None	LeadsConvertedDate	END_LEADS_LEAD_IS_CONTACT
54	Opp is closed before createdon, ae date set to close date	OppsAeDate	END_OPPS_CLOSED_BEFORE_CREATEDON
55	Opp has history stages present before createdon, ae date set to close date	OppsAeDate	END_OPPS_HISTORY_STAGES_BEFORE_CREATEDON
56	Opp handoff happened at opp creation date, ae date set to createdon	OppsAeDate	END_OPPS_NO_HANDOFF_RETURNING_ML_CREATEDON
57	Opp handoff from SDR to AE happened on the date of the AE's first activity on the lead	OppsAeDate	END_OPPS_HANDOFF_BEFORE_OPP_CREATION
58	Opp handoff from SDR to AE happened on the date of the AE's first activity on the opp.	OppsAeDate	END_OPPS_HANDOFF_AFTER_OPP_CREATION
59	New lead created, the the outcome is 'untouched' till activities performed	SsrSsrHistory	OUTCOME_NEW_LEAD_CREATED
60	New account created, the the outcome is 'untouched' till activities performed	SsrSsrHistory	OUTCOME_NEW_ACCOUNT_CREATED
61	Lead ignored: no activity in 180 days since creation	SsrSsrHistory	OUTCOME_IGNORED_NO_ACTIVITIES_IN_CREATEDON_PLUS_180_DAYS
62	Lead prospecting started: first_touch is not None	SsrSsrHistory	OUTCOME_PROSPECTING_ACTIVITY_RECORDED
63	Lead disqualified	SsrSsrHistory	OUTCOME_LEAD_DISQUALIFIED
64	Lead converted	SsrSsrHistory	OUTCOME_LEAD_CONVERTED

rule_list _sys_docid	description	model	rule_name
65	Lead abandoned: no activities in 150 days since last touched	SsrSsrHistory	OUTCOME_ABANDONED_NO_MORE_ACTIVITES_IN_150_DAYS
66	Opp won in CRM	SsrSsrHistory	OUTCOME_CRM_ISWON_FLAG_SET_TRUE
67	Opp lost in CRM	SsrSsrHistory	OUTCOME_CRM_ISWON_FLAG_SET_FALSE
68	Postselling successful: upsell opp is created	SsrSsrHistory	OUTCOME_POSTSELLING_UPSELLING_STARTED
69	Postselling failed: no upsell opp created and activities stopped	SsrSsrHistory	OUTCOME_POSTSELLING_CHURNED
70	Restarting prospecting succeeded: another new logo created	SsrSsrHistory	OUTCOME_RECYCLED_PROSPECTING_RESTARTED_NEW_LOGO
71	Restarting prospecting failed: no more opps created and activities stopped	SsrSsrHistory	OUTCOME_RECYCLED_PROSPECTING_SELLING_ABANDONED
72	Postselling ends after a number of full years without upsell creation	SsrSsrHistory	END_POSTSELLING_CHURNED_LAST_WON_OPP_PLUS_FULL_YEARS
73	Restarting prospecting ends after a number of full years without another new logo creation	SsrSsrHistory	END_RECYCLED_PROSPECTING_LAST_LOST_NEW_LOGO_PLUS_FULL_YEARS
74	Lead CRM creator becomes the owner	SsrSsrHistory	OWNERSHIP_LEADS_CRM_CREATOR
75	Account CRM creator becomes the owner	SsrSsrHistory	OWNERSHIP_ACCOUNTS_CRM_CREATOR
76	Account owner is the CRM owner	SsrSsrHistory	OWNERSHIP_ACCOUNTS_CRM_OWNER
77	Selling started at or after the CRM opp creation date, so the CRM creator of the opp becomes the owner	SsrSsrHistory	OWNERSHIP_ACCOUNTS_CRM_OPP_CREATOR_SELLING_STARTED_AT_OR_AFTER_OPP_CREATION
78	Account owner overridden by owner of the most activities	SsrSsrHistory	OWNERSHIP_ACCOUNTS_CRM_OWNER_OVERRIDDEN_BY_ACT_COUNT
79	Adjusted duration based on expected duration because owner activity capture level not present or too low	SsrSsrHistory	ADJUSTED_DURATION_NOT_ENOUGH_ACTIVITY_CAPTURE_LEVEL

rule_list _sys_docid	description	model	rule_name
80	Adjusted duration based on expected duration from industry defaults because owner activity capture level not present or too low and not enough representative reps	SsrSsrHistory	ADJUSTED_DURATION_NOT_ENOUGH_ACTIVITY_CAPTURE_LEVEL_AND_USED_INDUSTRY_DEFAULT
81	Adjusted duration based on duration because owner activity capture level present and high enough and most activities are performed by the owner	SsrSsrHistory	ADJUSTED_DURATION_ENOUGH_ACTIVITY_CAPTURE_LEVEL_AND_MOST_DURATION_BY_OWNER
82	Adjusted duration based on duration because owner activity capture level present and high enough but most activities are not performed by the owner	SsrSsrHistory	ADJUSTED_DURATION_ENOUGH_ACTIVITY_CAPTURE_LEVEL_BUT_MOST_DURATION_NOT_BY_OWNER
83	Opp booking amount absent, returning the last present booking amount in opp history	OppsPredBookingAmt	BOOKING_AMT_FROM_HISTORY
84	Opp booking amount absent and no booking amount present in opp history, returning the median across similar opps	OppsPredBookingAmt	BOOKING_AMT_FEAT_COMB_MEDIAN
85	Opp booking amount absent and no booking amount present in opp history, returning the median across all opps	OppsPredBookingAmt	BOOKING_AMT_FEAT_OVERALL_MEDIAN
86	Returning opp trueai booking amount	OppsPredBookingAmt	ML_BOOKING_AMT
87	Activity performed before hat lead created date, and hatlead untouched, becomes internal	ActivitiesInteractionPurpose	BEFORE_HATLEAD_CREATION_AND_HATLEAD_UNTOUCHED
88	Activity performed before hat lead close date, becomes prospecting	ActivitiesInteractionPurpose	BEFORE_HATLEAD_CLOSE_DATE
89	Oppid present, activity performed after won close date, or after upsell lost close date, becomes post sales support	ActivitiesInteractionPurpose	OPPID_WON_AFTER_CLOSE_DATE_OR_LOST_UPSELL

rule_list _sys_docid	description	model	rule_name
90	Oppid present, activity performed after new logo lost close date, becomes recycled prospecting	ActivitiesInteractionPurpose	OPPID_NL_LOST_AFTER_CLOSE_DATE
91	Oppid present, activity performed before close date, or before selling start date with no previous opps closed, becomes New Logo Selling/Upselling	ActivitiesInteractionPurpose	OPPID_BEFORE_CLOSE_DATE_OR_BEFORE_AE_DATE_BUT_NO_PREV_CLOSED_OPPS
92	Oppid present, activity performed before selling start date, with previous opps won, becomes post sales support	ActivitiesInteractionPurpose	OPPID_BUT_BEFORE_AE_DATE_WITH_PREV_WON_OPPS
93	Oppid present, activity performed before selling start date, becomes recycled prospecting	ActivitiesInteractionPurpose	OPPID_BUT_BEFORE_AE_DATE_WITH_PREV_CLOSED_OPPS_NOT_WON
94	Oppid absent, but one open opp present, becomes New Logo Selling/Upselling	ActivitiesInteractionPurpose	NO_OPPID_ONE_OPEN_OPP
95	Oppid absent, but one open opp by activity owner present, becomes New Logo Selling/Upselling	ActivitiesInteractionPurpose	NO_OPPID_ONE_OPEN_OPP_BY_ACT_OWNER
96	Oppid absent, but one open opp that is later won present, becomes New Logo Selling/Upselling	ActivitiesInteractionPurpose	NO_OPPID_ONE_OPEN_OPP_LATER_WON_BY_ACT_OWNER
97	Oppid absent, but many open opps present, choosing the most recent one, becomes New Logo Selling/Upselling	ActivitiesInteractionPurpose	NO_OPPID_LATEST_OPP
98	Oppid absent, but activity performed after conversion date, won opps present, becomes Upselling	ActivitiesInteractionPurpose	NO_OPPID_NO_OPEN_OPPS_BUT_WON_OPPS
99	Oppid absent, but activity performed after conversion date, won opps absent, becomes recycled prospecting	ActivitiesInteractionPurpose	NO_OPPID_NO_OPEN_OPPS_BUT_LOST_OPPS
100	Value present, no need to look up	Lookup	SELF

rule_list _sys_docid	description	model	rule_name
101	Value looked up from hatlead	Lookup	HATLEAD
102	Value looked up from account	Lookup	ACCOUNT
103	Value looked up from lead	Lookup	LEAD
104	Value looked up from opp	Lookup	OPP
105	Value looked up from contact	Lookup	CONTACT
106	ND value present, and no non-ND value in other entities	Lookup	SELF_ND
107	Value is absent but creator is the same as owner, returning Rep Lead Gen	Lookup	SAME_CREATOR_OWNER
108	No hr file found	UsersHrInfo	NO_HR_FILE
109	Exact match found for user's crm.email	UsersHrInfo	MATCHED_EMAIL
110	Exact match found for user's crm.fname + crm.lname	UsersHrInfo	MATCHED_FULLNAME
111	Fuzzy match found for user's name	UsersHrInfo	FUZZY_MATCH
112	Neither email nor full name matched	UsersHrInfo	NO_MATCH
113	Exactly one value matched exactly	UsersGroup	UNIQUE_EXACT_MATCH
114	Exactly one value returned from a fuzzy match	UsersGroup	UNIQUE_FUZZY_MATCH
115	More than one value returned from a fuzzy match, unable to determine which one is correct	UsersGroup	MORE_THAN_ONE_FUZZY_MATCH
116	No exact match nor fuzzy match found	UsersGroup	NO_MATCH
117	Value based on user's manager's value	UsersGroup	MANAGERS_GROUP
118	Value based on crm value	UsersGroup	CRM_VALUE

rule_list _sys_docid	description	model	rule_name
119	Opp line items present, summing over their total_price	OppsBookingAmount	SUM_OF_OPP_LINE_ITEMS_TOTAL_PRICE
120	No value present, returning null	OppsBookingAmount	MISSING_VALUE
121	Currency conversion required and possible, value converted	OppsBookingAmount	CURRENCY_CONVERSION_APPLIED
122	Currency conversion not required or not possible, value not converted	OppsBookingAmount	NO_CURRENCY_CONVERSION_APPLIED

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