

a2zInc

a2z:

Personify Integration

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Contents

[1 Introduction 4](#_Toc246320656)

[2 Integration: Information flow from Personify to a2z 4](#_Toc246320657)

[*2.1* *Accounts Integration: Personify and a2z* 4](#_Toc246320658)

[2.1.1 Different Scenarios: 4](#_Toc246320659)

[3 Integration: Information flow from a2z to PERSONIFY 4](#_Toc246320660)

[*3.1 a2z activity/History* 5](#_Toc246320661)

[3.1.1 Different Scenarios: 5](#_Toc246320662)

[4 Synchronization frequency 5](#_Toc246320663)

[Appendix A 5](#_Toc246320664)

[BoothHistory 5](#_Toc246320665)

[Order History 6](#_Toc246320666)

[Overall History 7](#_Toc246320667)

# Introduction

The document details data import/export from a2z toPersonify.

# Integration: Information flow from Personify to a2z

An information flow diagram is added at the end of the document in the appendix-1.

## *Accounts Integration: Personify and a2z*

Underlying criteria during synchronization:

1. An account in PERSONIFY corresponds to Company profile in a2z.
2. If an account is modified in PERSONIFY, the changes will reflect in a2z in the subsequent synchronization run or on demand synchronization.

### Different Scenarios:

#### New account added to PERSONIFY

If a new account in PERSONIFY, it will be imported as a new Company in a2z. Related data will be copied over in company profile in a2z.

#### New account/company profile added directly to a2z

This should be avoided as company information flow only from PERSONIFY to a2z and not other way. With no company information in PERSONIFY no associated financial will be exported to PERSONIFY.

#### Account updated in PERSONIFY

If any change is made to an account in PERSONIFY, the corresponding company profile in a2z will be overwritten on a subsequent synchronization.

#### Account updated in a2z

The changes will not reflect in PERSONIFY as company information doesn’t flow from a2z to PERSONIFY.

# Integration: Information flow from a2z to PERSONIFY

Three sets of data are exported to PERSONIFY: Order History, Booth History and Overall History (see appendix B for details).

Information required for setup the PERSONIFY integration:

1. PERSONIFY access information: username and password
2. 3 Custom tables needs to created in PERSONIFY, one each for the history table.
3. Companies in a2z should be imported into PERSONIFY and Companies in a2z need to have the correct PERSONIFY id in their company number field.

NOTE: This may incur additional charges

1. If account needs to have a primary contact, then a check box for the same is needed in PERSONIFY.

## *3.1 a2z activity/History*

The data from the 3 tables mentioned below is exported from a2z to PERSONIFY.

1. Booth History
2. Order History
3. Overall History

### Different Scenarios:

#### Data added in a2z

The data is exported to PERSONIFY daily (scheduled /on demand) and updates the records.

Data can’t be added directly to PERSONIFY.

#### Data modified in a2z

All history items associated with the account are deleted in PERSONIFY and modified data from a2z is reinserted.

# Synchronization frequency

Synchronization frequency examples are mentioned below:

* 1. PERSONIFY to a2z : Interval to be decided / on demand through a2z GA
  2. A2z to PERSONIFY: once a day/ on demand through a2z GA

## Appendix A

### BoothHistory

BoothHistory entity is basically a list of each booth that the exhibitor currently has, the following are the list of fields

|  |  |  |
| --- | --- | --- |
| **FieldName** | **DataType** | **Description** |
| CompanyNumber | String(50) | This is the binding key that binds two systems together, corresponds to salesforce accounted |
| EventName | String(50) | The eventname that is setup into a2z |
| ApplicationDate | Datetime | Date when the application was received(Applicable to Application Management only) |
| AssignedBy | String(50) | The Name of the Login who assigned the booth |
| BoothAmount | Currency | Total Booth Amount |
| BoothAmountPaid | Currency | Amount paid for this booth |
| BoothArea | Decimal | Total Booth Area in sq ft |
| BoothLabel | String(50) | Booth Number |
| BoothHeight | Decimal | Length of the booth in ft |
| BoothWidth | Decimal | Width of the booth in ft |
| DateAssigned | Datetime | Date when the booth was assigned |
| Item | String(50) | The item selected when the booth was assigned. Ex. Island, Peninsula etc. |
| Pavilion | String(50) | The pavilion the booth is attached to. |
| SoldBy | String(50) | Name of the sales person who sold this booth. |

### Order History

OrderHistory entity contains the list of each order (line item) that the exhibitor has purchased in a2z system. Ex. Booth Space, Sponsorship etc.

List of Fields

|  |  |  |
| --- | --- | --- |
| **FieldName** | **DataType** | **Description** |
| CompanyNumber | String(50) | This is the binding key that binds two systems together, corresponds to salesforce accounted |
| EventName | String(50) | The eventname that is setup into a2z |
| InvoiceOrderAmount | Currency | How much of the order amount has been invoiced. |
| Item | String(50) | The item name for the order |
| ItemType | String(50) | The type of item, ex. Booth Space, Sponsorship |
| OrderDate | Datetime | Date when the order was added |
| OrderID | Integer | OrderID(a2z) is the unique key for each order |
| PaidOrderAmount | Currency | How much of the order amount has been paid |
| Price | Decimal | THis is the price of the item, ex. $12 per 100 sq ft |
| Quantity | Integer | Total Quantity for this order. Ex. 100(100 sq ft) |
| SalesPerson | String(50) | Sale person who created this order |

### Overall History

OverallHistory object gives you summary level information for each exhibitor, ex. total boothspace, revenue, total sponsorship etc. for each event. This table summarizes the boothhistory and order history table.

List of Fields

|  |  |  |
| --- | --- | --- |
| **FieldName** | **DataType** | **Description** |
| CompanyNumber | String(50) | This is the binding key that binds two systems together, ex is salesforce accountid |
| EventName | String(50) | The eventname that is setup into a2z |
| AdvertisingAmount | Currency | Total Advertising Revenue |
| BoothPersonnelAmount | Currency | Total Exhibitor Badge Revenue |
| BoothSpaceAmount | Currency | Total Booth Space Revenue |
| CancellationAmount | Currency | Total Cancellation Amount |
| MiscAmount | Currency | Total Miscellaneous Amount |
| PremiumSpaceAmount | Currency | Total Premium Amount |
| SponsorshipAmount | Currency | Total Sponsorship Revenue |
| WebRevenueAmount | Currency | Total Web Revenue |
| TotalAmount | Currency | Total of all order items purchased in a2z |
| TotalAmountInvoiced | Currency | Total Amount invoiced |
| TotalAmountPaid | Currency | Total Payments received from this exhibitor |
| TotalBoothArea | Decimal | Total Booth area the exhibitor has for this event. |