**CITCO – Customer Code Change Details**

**Customer Extract Package – XXMX\_AR\_CUSTOMERS\_PKG**

| **S.No** | **Object Details** | **CITCO** | **Maximise** | **Comments** |
| --- | --- | --- | --- | --- |
| 1 | hz\_parties\_stg | 1. WITH selection block query is different. Union block queries are commented out and those are handled in CM package.  XXMX\_CUSTOMER\_SCOPE\_T  2. DBLINK is different @xxmx\_extract  3. An optimizer hint is used to improve the performance of the query.  4. The following column values are different   * hp.party\_number party\_number * party\_usage\_code * organization\_name * person\_last\_name\_prefix * person\_title * attribute1 to attribute24 are selected from hz\_parties table | 1.WITH selection block query is different  XXMX\_CUSTOMER\_SCOPE\_TEMP\_STG  2. DBLINK is different @MXDM\_NVIS\_EXTRACT  3. Hint is not used  4. The following column values are different   * NULL party\_number * party\_usage\_code * organization\_name(double codes needs to be handled) * person\_last\_name\_prefix * person\_title * attribute1 to attribute24 are null | 1.No need to modify it in Maximise  2. Maximise should be updated. DB Link name should be generic such as ‘XXMX\_EXTRACT’.  3. Maximise team can double check and add the hint if needed to improve performance.  4. Maximise team to double check  **Main thing double quotes on customer name needs to be handled in Maximise.** |
| 2 | hz\_party\_sites\_stg | 1.WITH selection block query is different  XXMX\_CUSTOMER\_SCOPE\_T  2. party\_site\_number column value is selected from hz\_party\_sites table | 1.WITH selection block query is different  XXMX\_CUSTOMER\_SCOPE\_TEMP\_STG  2. party\_site\_number is null | 1.No need to modify it in Maximise  2. Maximise team to double check |
| 3 | hz\_party\_site\_uses\_stg | 1.WITH selection block query is different  XXMX\_CUSTOMER\_SCOPE\_T  2. AND hpsu.site\_use\_type not in ('BOL','ACK','INV','DRAWEE') – this condition does not exists in the query | 1.WITH selection block query is different  XXMX\_CUSTOMER\_SCOPE\_TEMP\_STG  2. AND hpsu.site\_use\_type not in ('BOL','ACK','INV','DRAWEE') – this condition exists in the query | 1.No need to modify it in Maximise  2. Maximise team to double check |
| 4 | hz\_cust\_accounts\_stg | 1.XXMX\_CUSTOMER\_SCOPE\_T is used  2.The following column logic is different compared to Maximise   * replace(hca.account\_name,chr(10)) account\_name – replacing line break in account name field * account\_established\_date is selected from HZ\_CUST\_ACCOUNTS table | 1. XXMX\_CUSTOMER\_SCOPE\_TEMP\_STG is used  2.The following column logic is different compared to Citco   * hca.account\_name account\_name – * nvl(hca.account\_established\_date,hca.creation\_Date) - account\_established\_date is null then creation\_date will be picked from HZ\_CUST\_ACCOUNTS table. | 1.No need to modify it in Maximise  2. Maximise should be updated |
| 5 | hz\_cust\_acct\_sites\_stg  hz\_account\_site\_uses\_stg | 1.WITH selection block query is different  XXMX\_CUSTOMER\_SCOPE\_T  2. ou\_name field value is selected from selection block not from hr\_all\_organization\_units and this table & relevant condition is commented out in the query. | 1.WITH selection block query is different  XXMX\_CUSTOMER\_SCOPE\_TEMP\_STG  2. ou\_name field value is selected from hr\_all\_organization\_units table. | 1.No need to modify it in Maximise  2. Maximise team to double check |
| 6 | hz\_customer\_profiles\_stg | 1. insert\_update\_flag= 'I'  2. org\_id=1(account\_level)/ org\_id=FUSION\_BUSINESS\_UNIT\_ID(site\_level – union block)  3. ou\_name is null (account\_level)/ ou\_name= selection.operating\_unit\_name(site\_level-union block) - hr\_all\_organization\_units table is commented out instead the following conditions are amended  ***and ou\_selection.source\_org\_id = selection.org\_id***  ***and ou\_selection.cust\_migration\_enabled\_flag = 'Y'*** | 1. insert\_update\_flag is null  2. org\_id is null  3. ou\_name= 'DEFAULT' (account\_level)/ou\_name=org.name from hr\_all\_organization\_units table(site\_level-union block) | Maximise team to double check |
| 7 | hz\_locations\_stg | 1.XXMX\_CUSTOMER\_SCOPE\_T is used  2. Double quotes has been handled in following columns: hl.address1, hl.address2, hl.address3, hl.address4 through XXMX\_UTILITIES\_PKG.handle\_double\_quotes procedure | 1.XXMX\_CUSTOMER\_SCOPE\_TEMP\_STG is used  2. Double quotes is not handled in following columns: hl.address1, hl.address2, hl.address3, hl.address4 through XXMX\_UTILITIES\_PKG.handle\_double\_quotes procedure | 1. No need to modify it in Maximise  **2. Maximise should be updated. Double quotes on address fields has to be handled in Maximise** |
| 8 | hz\_relationships\_stg  hz\_cust\_acct\_contact\_stg  hz\_org\_contacts\_stg  hz\_contact\_roles\_stg  hz\_contact\_points\_stg  hz\_role\_resps\_stg | XXMX\_CUSTOMER\_SCOPE\_T is used | XXMX\_CUSTOMER\_SCOPE\_TEMP\_STG is used | For these procedures, the logics are maintained separately in XXMX\_AR\_CUSTOMERS\_CM pkg not in this XXMX\_AR\_CUSTOMERS\_PKG. Maximise team to double check. |
| 9 | hz\_person\_language\_stg  hz\_party\_classifs\_stg | DBLINK is different @xxmx\_extract | DBLINK is different @MXDM\_NVIS\_EXTRACT | Maximise should be updated. DB Link name should be generic such as ‘XXMX\_EXTRACT’. |
| 10 | hz\_cust\_acct\_relate\_stg | 1.XXMX\_CUSTOMER\_SCOPE\_T is used  2. related\_cust\_orig\_sys\_ref column value -  hcara.related\_cust\_account\_id from hz\_cust\_acct\_relate\_all table | 1.XXMX\_CUSTOMER\_SCOPE\_TEMP\_STG is used  2. related\_cust\_orig\_sys\_ref column value -  (SELECT account\_number  FROM apps.hz\_cust\_accounts@MXDM\_NVIS\_EXTRACT  WHERE cust\_account\_id = hcara.related\_cust\_account\_id ) related\_cust\_orig\_sys\_ref | Maximise team to double check |
| 11 | ra\_cust\_rcpt\_methods\_stg | 1.XXMX\_CUSTOMER\_SCOPE\_T is used  2. DBLINK is different @xxmx\_extract | 1.XXMX\_CUSTOMER\_SCOPE\_TEMP\_STG is used  2. DBLINK is different @MXDM\_NVIS\_EXTRACT | Maximise should be updated. DB Link name should be generic such as ‘XXMX\_EXTRACT’. |
| 12 | ar\_cust\_banks\_stg | 1.XXMX\_CUSTOMER\_SCOPE\_T is used  2. DBLINK is different @xxmx\_extract  3. Column name mismatch in cursor query as a result an insert block parameter alias name also changed.  src.bank\_num  null bank\_num  ar\_cust\_banks\_tbl(i).bank\_num | 1.XXMX\_CUSTOMER\_SCOPE\_TEMP\_STG is used  2. DBLINK is different @MXDM\_NVIS\_EXTRACT  3. Column name mismatch in cursor query as a result an insert block parameter alias name also changed.  src.bank\_branch\_number  iebb.branch\_number bank\_branch\_number  ar\_cust\_banks\_tbl(i).bank\_branch\_number | 1.No need to modify it in Maximise  2. Maximise should be updated. DB Link name should be generic such as ‘XXMX\_EXTRACT’.  3. Maximise team to double check |
| 13 | stg\_main | 1.XXMX\_CUSTOMER\_SCOPE\_TEMP\_STG doesn’t exists  2.Below procedure call is commented xxmx\_ar\_customers\_cm\_pkg.customers\_cm\_stg(vt\_MigrationSetID); | 1.XXMX\_CUSTOMER\_SCOPE\_TEMP\_STG – Inserting values to this temp table from xxmx\_customer\_scope\_v mvw  2.Below procedure call is not commented xxmx\_ar\_customers\_cm\_pkg.customers\_cm\_stg(vt\_MigrationSetID); | 1. No need to modify it in Maximise  2. Maximise team to double check |
| 14 | update\_stats | Procedure exists | Procedure does not exists | This procedure has been created in Citco and it updates the record count of all TCA tables into custom table called xxmx\_object\_summary. Maximise can use the code if needed. |

**CITCO - Customer Tax Package Change Details**

**Package Name: XXMX\_CUSTOMER\_TAX\_PROFILE\_PKG**

| **S.No** | **Object Details** | **CITCO** | **Maximise** | **Comments** |
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| 1 | Package Name | XXMX\_CUSTOMER\_TAX\_PROFILE\_PKG | XXMX\_ZX\_CUSTOMER\_TAX\_PKG | No need to change in Maximise |
| 2 | Procedure Names | The following Procedure names are different compared to Maximise.  party\_tax\_profile\_stg  party\_tax\_classific\_stg  xxmx\_zx\_tax\_registration\_stg | The following Procedure names are different compared to CITCO.  zx\_tax\_profile\_stg  zx\_party\_classific\_stg  zx\_tax\_registration\_stg  The following procedures are missing.  xfm\_main  purge | No need to change in Maximise.  Maximise Team to double check and add xfm\_main and purge procedures into main package. |
| 4 | Variable names | 1.gcv\_BusinessEntity | 1.gct\_BusinessEntity    2.The following variable names are defined globally and most of them are not used  gvn\_ExistenceCount    e\_moduleerror  e\_dateerror    gvb\_SimpleTransformsRequired  gvt\_TransformCategoryCode  gvb\_MissingSimpleTransforms  gvb\_DataEnrichmentRequired  gvt\_ParameterCode  gvv\_ParameterCheckResult  gvb\_MissingDataEnrichment  gvb\_ComplexTransformsRequired  gvb\_PerformComplexTransforms | 1.No change required  2. Maximise team to double check and remove the unwanted variables which are defined. |
| 5 | Tax Profile proc | 1. DBLINK is different - @xxmx\_extract  2. XXMX\_CUSTOMER\_SCOPE\_T – Table is used  3. gct\_SubEntity is not defined in CITCO code instead it is using pt\_i\_SubEntity parameter  4. gvt\_ReturnMessage is not defined. Directly passed NULL value to pt\_i\_OracleError parameter while calling xxmx\_utilities\_pkg.log\_module\_message    5. pt\_i\_MigrationSetID parameter has been passed to xxmx\_utilities\_pkg.clear\_messages.  6. xxmx\_utilities\_pkg.log\_module\_message procedure call is present in CITCO code after the 0050 progressindicator.    7. Query to get the total number of row count to be extracted exists    8. Cursor Count is being inserted into module\_message table      9. INSERT INTO xxmx\_zx\_tax\_profile\_stg is not in correct order compared to Maximise code. FILE\_SET\_ID field is missing in Maximise code. | 1. DBLINK is different - @MXDM\_NVIS\_EXTRACT  2. XXMX\_CUSTOMER\_SCOPE\_V – View is used  3. gct\_SubEntity has been defined    4. Variable gvt\_ReturnMessage has been defined with value NULL and the same has been passed to pt\_i\_OracleError parameter while calling xxmx\_utilities\_pkg.log\_module\_message      5. pt\_i\_MigrationSetID parameter has not been passed to xxmx\_utilities\_pkg.clear\_messages  6. xxmx\_utilities\_pkg.log\_module\_message procedure call is missing after the 0050 progressindicator.  7. Query to get the total number of row count to be extracted not exists    8. Cursor Count is not being inserted into module\_message table  9. INSERT INTO xxmx\_zx\_tax\_profile\_stg is not in correct order compared to CITCO code. FILE\_SET\_ID field is missing. | 1. Maximise should be updated. DB Link name should be generic such as ‘XXMX\_EXTRACT’.  Maximise team to double check the remaining points |
| 6 | Tax Classific proc | 1. Select Query columns are not in correct order compared to Maximise. FISCAL\_CLASSIFICATION\_CODE column is not being selected in the query.  2. DBLINK is different - @xxmx\_extract  3. XXMX\_CUSTOMER\_SCOPE\_T – Table is used  4. gct\_SubEntity is not defined in CITCO code instead it is using pt\_i\_SubEntity parameter  5. gvt\_ReturnMessage is not defined. Directly passed NULL value to pt\_i\_OracleError parameter while calling xxmx\_utilities\_pkg.log\_module\_message    6. pt\_i\_MigrationSetID parameter has been passed to xxmx\_utilities\_pkg.clear\_messages.  7. xxmx\_utilities\_pkg.log\_module\_message procedure call is present in CITCO code after the 0050 progressindicator.    8. FOR Loop is used to insert the rows    9. INSERT INTO xxmx\_zx\_party\_classific\_stg is not in correct order compared to Maximise code. FILE\_SET\_ID field is missing in Maximise code. | 1. Select Query columns are not in correct order compared to Citco. FISCAL\_CLASSIFICATION\_CODE is being selected in the query and it has a value of NULL.  2. DBLINK is different - @MXDM\_NVIS\_EXTRACT  3. XXMX\_CUSTOMER\_SCOPE\_V – View is used  4. gct\_SubEntity has been defined    5. Variable gvt\_ReturnMessage has been defined with value NULL and the same has been passed to pt\_i\_OracleError parameter while calling xxmx\_utilities\_pkg.log\_module\_message      6. pt\_i\_MigrationSetID parameter has not been passed to xxmx\_utilities\_pkg.clear\_messages  7. xxmx\_utilities\_pkg.log\_module\_message procedure call is missing after the 0050 progressindicator.  8. FORALL Loop is used to insert the rows    9. INSERT INTO xxmx\_zx\_tax\_profile\_stg is not in correct order compared to CITCO code. FILE\_SET\_ID field is missing. | 1.No impact.  2. Maximise should be updated. DB Link name should be generic such as ‘XXMX\_EXTRACT’.  Maximise team to double check the remaining points |
| 7 | Tax Registration proc | 1. The following fields values are coming from ZX\_REGISTRATIONS table:   * ROUNDING\_RULE\_CODE * SELF\_ASSESS\_FLAG   2. DBLINK is different - @xxmx\_extract  3. XXMX\_CUSTOMER\_SCOPE\_T – Table is used  4. Type declaration name is different compared to Maximise  5. gct\_SubEntity is not defined in CITCO code instead it is using pt\_i\_SubEntity parameter  6. gvt\_ReturnMessage is not defined. Directly passed NULL value to pt\_i\_OracleError parameter while calling xxmx\_utilities\_pkg.log\_module\_message    7. pt\_i\_MigrationSetID parameter has been passed to xxmx\_utilities\_pkg.clear\_messages.  8. xxmx\_utilities\_pkg.log\_module\_message procedure call is present in CITCO code after the 0050 progressindicator.    9. FOR Loop is used to insert the rows    10. INSERT INTO xxmx\_zx\_tax\_registration\_stg is not in correct order compared to Maximise code. FILE\_SET\_ID field & ROUNDING\_RULE\_CODE columns are missing in Maximise code. | 1. The following fields values are coming from ZX\_PARTY\_TAX\_PROFILE table:   * ROUNDING\_RULE\_CODE * SELF\_ASSESS\_FLAG   2. DBLINK is different - @MXDM\_NVIS\_EXTRACT  3. XXMX\_CUSTOMER\_SCOPE\_V – View is used  4. Type declaration name is different compared to Citco  5. gct\_SubEntity has been defined    6. Variable gvt\_ReturnMessage has been defined with value NULL and the same has been passed to pt\_i\_OracleError parameter while calling xxmx\_utilities\_pkg.log\_module\_message      7. pt\_i\_MigrationSetID parameter has not been passed to xxmx\_utilities\_pkg.clear\_messages  8. xxmx\_utilities\_pkg.log\_module\_message procedure call is missing after the 0050 progressindicator.  9. FORALL Loop is used to insert the rows    10. INSERT INTO xxmx\_zx\_tax\_registration\_stg is not in correct order compared to Citco code. FILE\_SET\_ID field & ROUNDING\_RULE\_CODE columns are missing in Maximise code. | 1.Maximise should be updated.  2. Maximise should be updated. DB Link name should be generic such as ‘XXMX\_EXTRACT’.  10. Maximise should be updated.  Remaining points are fine not an issue. Maximise team to double check |
| 8 | Stg\_main | Select query is little bit different from Maximise code. Variable names are not matching with Maximise code.  Calling procedure logic is different from Maximise code. | Select query is little bit different from Citco code. Variable names are not matching with Citco code.  Calling procedure logic is different from Citco code. | No impact and no need to change in Maximise. |

**XXMX\_AR\_CUSTOMERS\_CM\_PKG**

If compare with Maximise code, only one procedure definition matched with Citco code however the logics are different. May be this whole package has been modified for CITCO requirements. Maximise team to double check it.

**Customer Scope View**

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| **S.No** | **Object Details** | **Citco** | **Maximise** | **Comments** |
| 1. | Customer Scope | View has been used in Citco – XXMX\_CUSTOMER\_SCOPE\_V | Materialized view has been used in Maximise – XXMX\_CUSTOMER\_SCOPE \_V | No change required |
| 2. | WITH clause queries | xxmx\_parameters, xxmx\_parameter\_conversions, open\_payments, open\_balance\_trxs, incomplete\_trx\_custs\_and\_sites,  complete\_trx\_custs\_and\_sites,  customers\_with\_open\_payments,  adjusted\_trx\_customers,  customers\_with\_no\_activity,  consolidated\_customer\_list – these WITH clause queries are not defined in Citco. | xxmx\_parameters, xxmx\_parameter\_conversions, open\_payments, open\_balance\_trxs, incomplete\_trx\_custs\_and\_sites,  complete\_trx\_custs\_and\_sites,  customers\_with\_open\_payments,  adjusted\_trx\_customers,  customers\_with\_no\_activity,  consolidated\_customer\_list – these WITH clause queries are defined in Maximise. | No change required |
| 3. | WITH clause query - eligible\_org\_id\_list | 1.Optimizer hint has been used in Citco to improve the query performance.  2.DBLINK is different | 1.Since it is MVW, no hint has been defined  2.DBLINK is different | 1.No change required.  2. Maximise should be updated. DB Link name should be generic such as ‘XXMX\_EXTRACT’. |
| 4. | WITH clause query – customer\_projects | 1.It has not been defined separately in Citco. Instead, the query has been amended in eligible\_org\_id\_list WITH clause section.  2. DBLINK is different – xxmx\_extract  3. HZ\_PARTIES has been used in Citco  4. 999999 account excluded in Citco  and hzca.account\_number !='999999'  5. Optimizer hint has been used in Citco to improve the query performance.  6. AND hzca.party\_id = hzp.party\_id | 1.Customer\_projects with clause query exists in Maximise  2. DBLINK is different -@MXDM\_NVIS\_EXTRACT  3. HZ\_PARTIES has not been used in Citco  4. account\_number checks condition not present in Maximise code  5. Since it is MVW, no hint has been defined  6. This join is missing from Maximise | 1.No change required.  2. Maximise should be updated. DB Link name should be generic such as ‘XXMX\_EXTRACT’.  3. Maximise team to double check  4. No change required as this is Citco specific  5. No change required, Maximise team to double check if this improves performance.  6. This join should be added in Maximise. |
| 5. | Internal active customer query | 1. Query to fetch all Internal active customers regardless of projects is present in Citco 2. AND hzca.party\_id = hzp.party\_id | 1. This query is not present in Maximise   2. This join is missing from Maximise | 1. Maximise team to double check   1. This join should be added in Maximise. |