



# **ZAIDYN™ Field Deployment API Guide**

**Prepared for External**

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# Getting Started

The ZAIDYN Field Performance Web Application Programming Interface (API) enables developers to seamlessly integrate ZAIDYN Field Performance with their systems.

This guide explains how to use the ZAIDYN Field Performance APIs and covers the fundamentals of building an integration process using these APIs.

## Authentication Requirements

To protect access to client data and systems, ZAIDYN Field Performance only allows approved users and systems to interact with the Web API. Likewise, interacting with FTP Workspace also requires getting proper credentials. Authorized users and systems need to request service accounts which provide access to the Web API and FTP Workspace.

## Requesting Service Accounts

Before using the Web API or FTP, you need to request service accounts by emailing [support@zs.com](mailto:support@zs.com).

### Sample Email

**To:** Support@zs.com

**Subject:** Please create service accounts for [your company]

*Hello,*

*This is [your name] at [your company]. I need a new service account created for [URL for your website]. Please name the service account [desired name\*]*

*Please also create an FTP service account named [desired name\*]*

*\*Names can only contain ASCII text, numeric, and underscore characters. Names cannot be longer than 128 characters.*

The suggested naming convention is: **[Environment]\_[ClientName]\_[SiteCode]\_[Purpose]**

For example, **Production\_Compellium\_0012a\_NightlyRefreshProcess**.

The ZS support team will respond to you with the names and passwords for these accounts. You will need these values to access the Web API or FTP Workspace.

## Using Your Service Accounts

When accessing your ZS ZAIDYN Field Performance, you will need to use the FTP service account and password. ZAIDYN Field Performance uses standard HTTP authentication; hence the username and password must be sent with every interaction.



**Note:** Bulk import supports UTF-8 for encoding all characters for all languages.

## **Differential Resourcing (DR)**

Differential Resourcing in sales is a concept that utilizes multiple primary employee assignments with differential roles and product bag assignments on a single geography. It helps to specifically tailor the deployed resources according to the local market conditions and evolving demand within that geography.

To enable Differential Resourcing support within an instance, the client must opt for it during the instance set up phase. Data contract for a new object named Positions and multiple changes across impacted workunit and other assignment data contracts would be a part of the DR set up.

# Import API

Import API is used to upload new or edit existing data in the application.

## Endpoint Details

Endpoint	URL	Type	Description
<b>ImportRequest</b>	<a href="https://fieldperformance.zaidyn.zsservices.com/{instance}/file/importRequest">https://fieldperformance.zaidyn.zsservices.com/{instance}/file/importRequest</a>	POST	API to ingest new or update existing data.
<b>JobStatus</b>	<a href="https://fieldperformance.zaidyn.zsservices.com/{instance}/JobStatus?JobId=?">https://fieldperformance.zaidyn.zsservices.com/{instance}/JobStatus?JobId=?</a>	GET	Polling API to check job/request status. This endpoint requires Job Id of INT datatype.
<b>ImportSummaryand Validations</b>	<a href="https://fieldperformance.zaidyn.zsservices.com/{instance}/file/ImportSummaryandValidations?RequestID=?">https://fieldperformance.zaidyn.zsservices.com/{instance}/file/ImportSummaryandValidations?RequestID=?</a>	GET	API to get the status of the import Request and to get a summary and details of success, errors or warning. This endpoint requires Request ID of INT datatype.
<b>ImportConflicts</b>	<a href="https://fieldperformance.zaidyn.zsservices.com/{instance}/file/ImportConflicts?RequestID=?">https://fieldperformance.zaidyn.zsservices.com/{instance}/file/ImportConflicts?RequestID=?</a>	GET	API to get details about records that were affected due to conflicts override or end date. This endpoint requires Request ID of INT datatype.
<b>Refresh API</b>	<a href="https://fieldperformance.zaidyn.zsservices.com/Alignmentgeneration/external/Refresh">https://fieldperformance.zaidyn.zsservices.com/Alignmentgeneration/external/Refresh</a>	POST	API to trigger an ad-hocrefresh.

## Import Request

Headers	Type	Sample value
<b>UserId</b>	Text	zs\1223
<b>Authorization</b>	Text	
<b>isAdminChange</b>	Boolean	Yes
<b>ContextName</b>	Text	SalesCrediting


## Import Request

The following table shows the input parameters for the **ImportRequest** endpoint.

Name	Type	Required	Default	Description
<b>FilePath</b>	Text	Yes	NA	Location from where the file to import data can be uploaded.
<b>EffectiveDate</b>	Date	Yes	NA	Date from which the changes should be applied. The effective date can be in <b>YYYY/MM/DD</b> , <b>YYYY-MM-DD</b> , <b>MM/DD/YYYY</b> or <b>MM-DD-YYYY</b> format.
<b>OverrideConflict</b>	Boolean	No	False	<ul style="list-style-type: none"><li>• Option that can be applied in case of the same conflicting records present in the system in future.</li><li>• If the conflict is simple, then the End Date or Override option is applied while making changes.</li><li>• In case of a complex conflict, even if Override is true, the changes are end dated before the conflict.</li></ul>

Name	Type	Required	Default	Description
<b>FailLocked</b>	Boolean	No	False	<p>Options that can be applied in case of a Locked record (for Draft and Pending Approval changes):</p> <ul style="list-style-type: none"> <li>• The system will execute the changes for Locked records (and fail the request in progress) if the Flag is true.</li> <li>• If the Flag is false, then the system will send a message to the user for that specific record to indicate that the record is locked and execute the changes for other records in the request.</li> </ul>
<b>EnablePartialUploadWithValidation</b>	Boolean	No	True	<p>Allows users to enable/disable partial upload in case of error/validation:</p> <ul style="list-style-type: none"> <li>• If True, then the file will be processed and records which doesn't have validation errors will be uploaded in the system.</li> <li>• If False and there is even one record having validation error, then the file will not be processed, and complete file upload will fail.</li> </ul>
<b>IsDeltaUpload</b>	Boolean	No	False	<ul style="list-style-type: none"> <li>• This new flag applies at the file level (request header) and distinguishes between a full feed or a delta feed for the Alignment upload type.</li> <li>• The flag determines whether the application processes and appends the alignment records in the file to the existing alignment or replaces/updates the existing alignment bag.</li> </ul>

Name	Type	Required	Default	Description
				<ul style="list-style-type: none"> <li>• This flag is applicable from FD-R6 onwards. Before FD-R6, in FD-R5/R5.1, the application processed records by replacing the existing alignment bag.</li> <li>• Starting with FD- R6, users can add, edit, or remove individual alignment records as well.</li> <li>• <b>Note:</b> This flag is applicable for customers and geo alignment only.</li> </ul>



**Note:** The **EnablePartialUploadWithValidation** parameter is enabled only for the following eight objects and for the rest of the objects, it will be ignored even if the user provides any input.

- Employee Changes
- Product Changes
- Customer Changes
- Work Unit Changes
- Employee Assignment Changes
- Product Assignment Changes
- Customer Alignment
- Geo Code Alignment Changes

## Endpoint

### URL

<https://fieldperformance.zaidyn.zsservices.com/{instance}/file/ImportRequest>

## Input Format

### JSON

```
{  
  "FilePath": "xxx",  
  "EffectiveDate": "xxx",  
  "OverrideConflict": xxx,  
  "FailLocked": xxx  
}
```

## Example

### JSON

```
{  
  "FilePath": " s3://  
  "OverrideConflict": false, "FailLocked": false  
}
```

## Output Format

### JSON

```
{  
  "JobId": "xxx", "RequestId": xxx
```

```
}
```

## Example

### JSON

```
{  
  
  "JobId": "3246f385-c833-11eb-b284-391535850b10",  
  
  "RequestId": 3298  
  
}
```

## Job Status

### Endpoint

#### URL

```
https://fieldperformance.zaidyn.zsservices.com/{instance}/JobStatus?JobId=?
```

### Input Format

#### JSON

```
{  
  
  JobId: xxx  
  
}
```

### Example

#### JSON

```
JSON  
  
{JobId: 3246f385-c833-11eb-b284-391535850b10  
  
}
```

## Output Format

### JSON

```
{  
  
  "StartTime": "xxx",  
  
  "Status": "xxx", "IsSuccess": xxx, "FailureMessage": "", "RunTimeTicks": xxx  
  
}
```

## Example

### JSON

```
{  
  
  "StartTime": "2021-06-08 08:26:29.722567",  
  
  "Status": "Success", "IsSuccess": true, "FailureMessage": "", "RunTimeTicks": 1256620  
  
}
```

## Summary and Validations

The following table shows the output parameters of the **ImportSummaryandValidations** endpoint.

Name	Type	Description
<b>TotalWarningRecords</b>	INT	Number of records with warnings due to any Conflict with future records.
<b>TotalProcessedRecords</b>	INT	Total of all processed records within respective job.
<b>TotalConflictOverrideRecords</b>	INT	Number of records that had Conflicts due to other changes and were successfully processed by Overriding the conflicting records.
<b>TotalConflictEndDateRecords</b>	INT	Number of records that had Conflicts due to other future changes and were successfully processed by end dating before the conflict.

Name	Type	Description
<b>TotalConflictIgnoredRecords</b>	INT	Count of records ignored in case of complex conflict and "IsOverrideFlag" is true.
<b>TotalGuardrailErrors</b>	INT	This field gives the details about the number of error guardrails triggered during bulk upload.
<b>TotalGuardrailWarnings</b>	INT	This field gives details about the number of warning guardrails triggered during the bulk upload.
<b>RecordErrorWarningDetails FileBucketName</b>	Text/ String	S3 bucket name where the error file is stored.
<b>RecordErrorWarningDetails FileRelativePath</b>	Text/ String	Relative file path of the error file which is stored in S3 bucket
<b>Total Processed records within file</b>	INT	Includes final number of records which were processed compared to records shared within the file.
<b>Total Processed Records Implicit</b>	INT	Includes associated + affiliated changes which got triggered due to records processed within the file.
<b>Total Processed Records Mirrored</b>	INT	Includes Mirrored changes which got triggered due to processing of records shared within the file.

### Endpoint

**URL**

```
https://fieldperformance.zaidyn.zsservices.com/{instance}//file/ImportSummaryAndValidations?
RequestId=xxxx
```

### Input Format

**JSON**

```
{ RequestID: xxx}
```



## Example

### JSON

```
{ RequestID: 3298}
```

## Output Format

### JSON

```
"Summary": {  
  
  "RequestId": xxx, "RequestTime": "", "TotalIgnoredRecords": xxx, "TotalErroredRecords": xxx,  
  "TotalWarningRecords": xxx, "TotalProcessedRecords": xxx,  
  
  "TotalConflictOverrideRecords": xxx, "TotalConflictEndDateRecords": xxx,  
  "TotalRemovedRecords": xxx, "TotalConflictIgnoredRecords": xxx "TotalGuardrailErrors": xxx,  
  "TotalGuardrailWarnings": xxx, "SummaryMessage": " xxx "  
  
},  
  
  " RecordErrorWarningDetailsFileBucketName": " xxx "  
  "RecordErrorWarningDetailsFileRelativePath": "xxx"  
  
}
```

## Example

### JSON

```
{  
  
  "Summary": { "RequestId": 1977, "RequestTime": "2021-11-23 06:13:38.035919",  
  
  "TotalIgnoredRecords": 17,  
  
  "TotalErroredRecords": 0,  
  
  "TotalWarningRecords": 0,  
  
  "TotalProcessedRecords": 2,  
  
  "TotalConflictOverrideRecords": 0,
```

```
"TotalConflictEndDateRecords": 0,

"TotalRemovedRecords": 0,

"TotalConflictIgnoredRecords": 0

"TotalGuardrailErrors": 0,

"TotalGuardrailWarnings": 0,

"SummaryMessage": "The result may include dependent automated changes as well."

},

"RecordErrorWarningDetailsFileBucketName": "aws-a0078-xxxx-00-q-s3b-shrd-spm-int01",
"RecordErrorWarningDetailsFileRelativePath": "out/Validations_2021-11-

23/RecordErrorWarningDetails_RequestID1977.txt"

}
```



**Note:** The **RecordErrorWarningDetailsFile** will display details for a maximum of 50,000 records in the file, while the final count of errored records will be visible as part of the **TotalErroredRecords** and **TotalWarningRecords** fields. Also, the maximum record supported for summary and validation API is 8,00,000.

## STS Token

This API is used to access the error or warning details file. It accepts full file path as its input (i.e., Relative path). The validity of STS token is configurable, and the default value is 60 minutes.

### Example 1 (Configuration for validity)

#### JSON

```
"InternalBucket": {  
  
  "bucket": "aws-a9007-use1-00-m-s3b-shrd-spm-int01", "expTimeMillis": "600000", "region":  
  "us-east-1", "sessionTokenValidity": "3600",  
  
  "bucketAccessRoleARN": "arn:aws:iam::146897845139:role/rds-s3-import-role"  
  
}
```

### Example 2 (Relative Path)

#### JSON

```
{{baseUr1}}{{port_alignment}}{{appCode_shared}}/sts/file  
  
{  
  
  "key":"/out/Validations_2021-12-21/RecordErrorWarningDetails_RequestID2672.txt"  
  
}  
  
{{baseUr1}}{{port_alignment}}{{appCode_shared}}/sts/prefix  
  
{  
  
  "key":"in"  
  
}
```

## Error or Warning Details File

ZAIDYN Field Performance provides the capability to send verbose error file as well as concise error file. The concise error file shows the error and warning details in a more readable format to help users analyze the errors easily.

The error or warning details file can be modified using the optional parameter "isVerbose".

### JSON

```
{{baseUr1}}{{port_alignment}}/{{appCode_shared}}/sts/file
```

```
{
```

```
"key":"/out/Validations_2021-12-21/RecordErrorWarningDetails_RequestID2672.txt"
```

```
}
```

```
{{baseUr1}}{{port_alignment}}/{{appCode_shared}}/sts/prefix
```

```
{
```

```
"key":"in"
```

```
}
```

## Error or Warning Details File

ZADYN Field Performance provides the capability to send verbose error file as well as concise error file. The concise error file shows the error and warning details in a more readable format to help users analyze the errors easily.

The error or warning details file can be modified using the optional parameter "isVerbose".

### JSON

```
file/ImportSummaryAndValidations?RequestId=3534&isVerbose=False"
```

For concise error file (isVerbose=False), only ID column and error message in the error warning file will be available.

For verbose error file (isVerbose=True), all the columns as ingested will be available in the error file along with the error column.

You can configure the default value of the flag in the configuration file

```
"ImportSummaryAndValidationsVerboseDefaultValue": "false"
```

## Import Conflicts

The following table shows the output parameters of the **ImportConflicts** endpoint.

Name	Type	Description
<b>IsSimpleConflict</b>	Boolean	If true, then it indicates a simple conflict else a complex conflict.
<b>Message</b>	Text	Shares details about the conflict.
<b>Standard File Headers</b>	NA	Headers imported from file or tag.

### Endpoint

#### URL

```
https://fieldperformance.zaidyn.zsservices.com/{instance}/file/ImportConflicts?RequestId=?
```

### Input Format

#### JSON

```
{  
  RequestID: xxx  
}
```

### Example

#### JSON

## Output Format

### JSON

```
{
  "headers": [ "isSimpleConflict", "Message", ""XXXXX", ...
]
  "data" : [ "xxxxxxx ", "xxxxxxx", "xxxxxxx", ...
]
}
```

## Example

### JSON

```
{
  "headers": [ "isSimpleConflict", "Message", ""rolecategoryname", ...
]
  "data" : [ "True",
  "The record was successfully updated with future changes being overridden. Please refer to
  the reports for the details about the dropped records",
  "RC11",
]
}
```

## Refresh APIs

Refresh APIs allows you to trigger an adhoc refresh when there is a business requirement. After triggering the refresh, you will be able to:

- View a refresh notification on the taskbar when refresh is in progress and when it is completed. On clicking view summaries, you can also view the refresh summary which was triggered via Refresh APIs.
- View the refresh details and logs under the Refresh Details panel on the Alignment Refresh page.
- Receive refresh emails on its completion or failure.

The following table shows the headers required to execute the Refresh APIs:

Name	Type	Description
<b>EffectiveDate</b>	Date	Date on which the refresh is being triggered
<b>UserId</b>	Text	Unique id of the user triggering the refresh request
<b>Authorization</b>	Text	
<b>isAdminChange</b>	Boolean	Flag to indicate whether admin is making the request
<b>ContextName</b>	Text	SalesCrediting



**Note:** Alignment refresh for all contexts will be supported only through an API trigger. If the alignment refresh drops reports, the context name will be appended — for example, **IneligibleCustomerSalesCrediting**.

## Endpoint

### Example

#### URL

```
https://fieldperformance.zaidyn.zsservices.com/{instance}/alignmentgeneration/externalRefresh
```

## Input Format

#### JSON

```
{ "teamId": "xxx", "effectiveDate": "yyyy-mm-dd"
}
```

### Example

#### JSON

```
{
"teamId": "ONC_HEM", "effectiveDate": "2026-01-31"
}
```

# Refresh Log Metadata

## Overview

This API fetches all refresh log metadata generated within a specified date range for the selected teams. It returns metadata including the file paths of the refresh logs, which the client can use to download the files.



**Note:** Alignment refresh for all contexts will be supported only through an API trigger. If the alignment refresh drops reports, the context name will be appended — for example, **IneligibleCustomerSalesCrediting**.

## Endpoint

### URL

```
https://fieldperformance.zaidyn.zsservices.com/{instance}/file/ImportConflicts?RequestId=?
```

## Request Body

### JSON

```
{  
  
  "startDate": "2023-09-12",  
  
  "endDate": "2023-10-20",  
  
  "teamIds": ["GP", "Derma"]  
  
}
```



**Note:** Please find the parameters description below:

- **startDate:** The beginning of the date range (in YYYY-MM-DD format).
- **endDate:** The end of the date range (in YYYY-MM-DD format).
- **teamIds:** List of team identifiers for which the refresh logs should be retrieved.



## Output Format

### JSON

```
{
  "dirPath": "7002/refreshLog", "refreshLogDetailList": [
    {
      "requestId": 12852, "teamId": "Derma",
      "jobId": "f60a8f32-628a-11ee-b230-e4a85aucac69", "runDate": "2023-09-13T12:58:21",
      "runEffectiveDate": "2023-01-01", "reportType": "FilteredAlignments",
      "filePath": "s3://aws-a0078-use1-00-q-s3b-shrd-spm-
app01/7002/refreshLog/12852/FilteredAlignmentsReport_Frequency AdhocArchivalTeam1_2023-10-09
07.48.09.txt"
    },
    ...
  ]
}
```



**Note:** Please find the parameters description below:

**dirPath:** Path to the directory where refresh log files are stored. This path can be used to generate STS token.

**refreshLogDetailList:** List of log details containing:

- **requestId:** Unique identifier for the refresh request.
- **teamId:** The team for which the refresh log was generated.
- **jobId:** The job identifier associated with the refresh process.
- **runDate:** The timestamp when the refresh process was run.
- **runEffectiveDate:** The effective date of the refresh.
- **reportType:** The type of report generated.

- |   |
|---|
| <ul style="list-style-type: none"><li>• <b>filePath</b>: The location of the log file in the S3 bucket.</li></ul> |
|---|

## Example Workflow

1. **Fetch Log Metadata**: Send a request to the `/alignmentgeneration/refresh_logs_meta` endpoint with the necessary parameters (teams and time range) to receive metadata and file paths for the logs.
2. **Obtain an STS Token for Download**: To download the log files, user need to obtain an STS token for temporary access to the S3 bucket. Use the dipath from the previous response and send a request to the STS token API.

**API:** POST `/ft4q-7101a/sts/app-prefix`

## URL Example

### JSON

```
bash

curl --location 'https://fieldperformance.zaidyn.qa.zsservices.com/ft4q- 7101a/sts/app-
prefix' \

--header 'Authorization: Basic <Basic_auth>' \

--header 'Content-Type: application/json' \

--data '{

"key": "7002/refreshLog"

}'
```

3. **Download Log Files**: Using the `refreshLogDetailList` (from Step 1) and the obtained STS token, download each log file. The token is valid for 60 minutes. If the download process takes longer, handle token expiration by catching the exception and renewing the token.

## Additional Notes:

- The token is valid for 60 minutes, handle token expiration appropriately.
- Ensure proper handling of exceptions related to S3 access or file download.

## Object Details

This section shows the object details for all the bulk import tags.

### Customer Type Changes

Name	Type	Required	Default	Sample Value	Description
<b>CustomerTypeid</b>	Text	Yes (Primary)	NA	ACC	Defines the unique identifier of the type of customer being created.
<b>CustomerTypeName</b>	Text	Yes (while adding)	NA	Account	Name of the type of customer being created.
<b>RemoveCustomerType</b>	Boolean	Optional	FALSE	FALSE	Remove the customer type.

### Customer Changes

Name	Type	Required	Default	Sample Value	Description
<b>CustomerId</b>	Text	Yes (Primary)	NA	A00003G3	Defines the unique identifier of the customer being created.
<b>CustomerName</b>	Text	Yes	NA	Customer Name	Name of the customer being created.
<b>CustomerTypeid</b>	Text	Yes	NA	ACC	ID of the type of customer being created.
<b>RemoveCustomer</b>	Boolean	Optional	FALSE	FALSE	Remove the customer.

## Customer Address Changes

Name	Type	Required	Default	Sample Value	Description
<b>CustomerId</b>	Text	Yes (Primary)	NA	A00003G3	Defines the unique identifier of the customer being created.
<b>CustomerAddressId</b>	Text	Yes (Primary)	NA	123 North Terrace	Since a customer can have multiple addresses, this property defines the Defines the unique identifier of the
<b>CustomerAddress1</b>	Text	Yes	Null	Suite 456	Address line1 for the address being added.
<b>CustomerAddress2</b>	Text	Optional	Null	Suite 456	Address line2 for the address being added.
<b>CustomerCity</b>	Text	Yes	NA	Evanston	Since a customer can have multiple addresses,
<b>CustomerState</b>	Text	Yes	NA	IL	Since a customer can have multiple addresses, this property defines the state of the customer's address.
<b>CustomerCountry</b>	Text	Yes	NA	USA	Since a customer can have multiple addresses, this property defines the country of the customer's address.
<b>CustomerCounty</b>	Text	Optional	Null	Fairfax County	Since a customer can have multiple addresses, this property defines the county of the customer's address.
<b>PrimaryAddress</b>	Boolean	Yes	FALSE	TRUE	Indicates whether the address is primary or not.

Name	Type	Required	Default	Sample Value	Description
<b>CustomerAddressType</b>	Text	Yes	NA	Work, Home, Other, etc.	Type of address.
<b>CustomerGeoCode</b>	Text	Yes	NA	78901	Since a customer can have multiple addresses, this property defines the Geo code of the customer's address.
<b>RemoveCustomerAddress</b>	Boolean	Optional	FALSE	FALSE	Remove the customer's address.
<b>CustomerLatitude</b>	Numeric	Optional	42.0502791	42.0502791	Default value from configuration setting.
<b>CustomerLongitude</b>	Numeric	Optional	-87.6821998	-87.6821998	Default value from configuration setting
<b>EligibleForAlignment</b>	Boolean	Optional	FALSE	FALSE	This column will decide whether the secondary address can be used to generate ZIP-based alignment.



**Note:** You can configure Default Customer **lat\_longin** configuration file. The configuration keys are **default\_customer\_latitude** and **default\_customer\_longitude**.

## Geo Code Changes

Name	Type	Required	Default	Sample Value	Description
<b>GeoCode</b>	Text	Yes (Primary)	NA	A00003G3	Add the Geo code in the system.
<b>GeoTypeId</b>	Text	Yes		ZIP/Brick	ID of the type of Geo being created.
<b>Name</b>	Text	Yes	NA	Zip Name	Name of the Geo code, which is being created.
<b>City</b>	Text	Yes	NA	Evanston	City where the Geo belongs.
<b>State</b>	Text	Yes	NA	IL	State where the Geo belongs.
<b>Country</b>	Text	Yes	NA	USA	Country where the Geo belongs.
<b>County</b>	Text	Optional	NA	Fairfax County	County where the Geo belongs.
<b>RemoveGeoCode</b>	Boolean	Optional	FALSE	FALSE	Remove the Geo code from the system.



**Note:** You can configure Default ZIP **lat\_long** in configuration file. The configuration keys are **default\_zip\_latitude** and **default\_zip\_longitude**.

## Customer Alignment Changes

Name	Type	Required	Default	Sample Value	Description
<b>CustomerId</b>	Text	Yes	NA	06001A	Defines the unique identifier of the customer to be added for alignment changes.
<b>TeamId</b>	Text	Yes	NA	TT_123	Defines the unique identifier of the team to be added for alignment changes.
<b>WorkUnitId</b>	Text	Optional	NA	1A0301C	Defines the unique identifier of the Work Unit to be added for alignment changes.
<b>AlignmentWeight</b>	Decimal	Mandatory	100.00	35.00	Stores information about customer's weight percent aligned to a Work Unit.
<b>AlignmentAttribute</b>	Text	Mandatory	NA	Primary	Stores information about customers attribute alignment to a Work Unit Mandatory for teams for which Alignment Attribute is enabled.
<b>ProductId</b>	Text	Optional	NA	Primary	Defines the unique identifier of the Product to be added for Product Level Alignment changes.
<b>Productweight</b>	Decimal	Optional	NA	Primary	Stores information about Product's weight percent aligned against a Customer Alignment.
<b>RemoveAlignment</b>	Boolean	Optional	FALSE	TRUE	Remove the alignment changes from the system.



**Note:** Unaligned customers present on the same data contract will have blank **WorkUnitId** column. User will be able to add 0% alignment weight from UI and Bulk both as a valid value. Reports and Export will start reflecting 0% alignment weights (wherever applicable).



**Note:** For PLA supporting teams in combination with **Customer type**, **ProductID** and **ProductWeight** will be mandatory.  
For PLA supporting team Fullfeed upload is not supported.

## Alignment Attribute LOV Upload

Name	Type	Required	Default	Sample Value	Description
<b>AlignmentAttribute</b>	Text	NA	NA	Primary	Stores information about values for customers attribute alignment to a Work Unit
<b>ValidationType</b>	Boolean	Optional	NA	Default/ AllowUnique	Allows user to define unique value to check alignment



**Note:** API for removing all the alignment attribute LOVs:

**POST:** /alignment-attribute/removeAllValues?effectiveDate=2025-01-01

Successful response will indicate that all the LOVs effective from the dates provided are removed from the systems.

Add/Edit/Delete of alignment attribute LOV's is always a full bag operation.



**Note:** Validation types for Alignment Attribute, LOV Data Contract for clients opting for the alignment attribute feature at instance level are as below.

- **AllowUnique** – This restricts user from selecting the same value more than once for a single customer across its shared alignments.
- **Default** – The attribute value marked as Default will be automatically applied if the user doesn't specify one during customer alignment creation via UI/Bulk

## Geo Code Alignment Changes

Name	Type	Required	Default	Sample Value	Description
<b>GeoCode</b>	Text	Yes	NA	06001A	Zip code to be added for alignment changes.
<b>TeamId</b>	Text	Yes	NA	TT_123	Defines the unique identifier of the team to be added for alignment changes.
<b>WorkUnitId</b>	Text	Optional	NA	1A0301C	Defines the unique identifier of the WorkUnit to be added for alignment changes.
<b>AlignmentWeight</b>	Decimal	Optional	100.00	35.00	Stores information about the Zip's weight percent aligned to a Work Unit.
<b>RemoveAlignment</b>	Boolean	Optional	FALSE	TRUE	Remove the alignment changes from the system.



**Note:** Unaligned ZIPs present on the same data contract will have blank **WorkUnitId** column. User will be able to add 0% alignment weight from UI and Bulk both as a valid value. Reports and Export will start reflecting 0% alignment weights (wherever applicable).

## Level Changes


Name	Type	Required	Default	Sample Value	Description
<b>LevelId</b>	Text	Yes (Primary)	NA	1	Defines the unique identifier of the Work Unit level to be added.
<b>LevelName</b>	Text	Yes	NA	PCP2	Name of the Work Unit level to be added.
<b>LevelParentId</b>	Text	Optional	Null	2	Defines the unique identifier of the parent Work Unit level to be added.
<b>LevelType</b>	Text	Yes		Other/Country/ Business Unit	Defines the type of level change.
<b>RemoveLevel</b>	Boolean	Optional	FALSE	FALSE	Remove the Work Unit level from the system.

## Team Changes

Name	Type	Required	Default	Sample Value	Description
<b>TeamId</b>	Text	Yes (Primary)	NA	TT1	Defines the unique identifier of the team to be added in the system.
<b>TeamName</b>	Text	Yes	NA	PrimaryCare	Name of the team to be added in the system.
<b>LowestLevelId</b>	Text	Optional	Null/Empty	1	Allows user to define the Level Id from which the levels are to be mapped with the team.
<b>TeamEnableSharedAlignment</b>	Boolean	Optional	FALSE	FALSE	Allows creation of Shared Alignments within the team.
<b>TeamEnableAlignmentWeightSum Not Equalto100</b>	Boolean	Optional	FALSE	FALSE	Allows weight less than or greater than 100 in case of Shared Alignment.

Name	Type	Required	Default	Sample Value	Description
<b>AllowDeltaOperationviaUIBRMSScenarioPublish</b>	Boolean	Optional	FALSE	FALSE	Allow users to upload the records as the delta addition to the existing records via UI, BRM and Scenario Publish.
<b>AllowGeoBasedAlignment</b>	Boolean	Optional	TRUE	FALSE	Allows user to define if Work Unit based Alignments are supported in the team. If users enable this flag, then they need to provide GeoType Id (by default, zip will be the GeoTypeId).
<b>GeoTypeid</b>	Text	Required (if AllowGeoBasedAlignment flag is True)	ZIP	ZIP1	Id of the type of Geo being created.
<b>AllowAlignmentAttribute</b>	Boolean	Optional	False	True	Allows user to define if Alignment attribute are supported in the team. Once the user modified this value to 'True,' it cannot be reverted to 'False.'
<b>AllowProductLevelAlignment</b>	Boolean	Optional	False	True	Allows users to define if product level alignment is supported in the team. <b>Note:</b> By default, the value is set to 'False.' This flag provides one time modification only. Once the user changes this value to 'True,' it cannot be reverted to 'False'.
<b>TeamEnableProductAllocationWeightSumNotEqualTo100</b>	Boolean	Optional	False	False	Allows users to enable when product allocation weight sum not equal to 100.

Name	Type	Required	Default	Sample Value	Description
<b>AllowCustomerBasedAlignment</b>	Boolean	Optional	TRUE	FALSE	Allows user to define if Customer based Alignments are supported in the team.
<b>AllowAlignmentMapView</b>	Boolean	Optional	True	False	Allows users to define if Alignment Map view is supported in the team
<b>AllowAlignmentTableView</b>	Boolean	Optional	True	True	Allows users to define if Alignment table view is supported in the team
<b>SetAlignmentMapDefault</b>	Boolean	Optional	TRUE	False	Allows users to define default view for the alignment planning page.
<b>AffiliationEnabled</b>	Boolean	Optional	FALSE	FALSE	Allows user to define if this team supports Affiliation.
<b>ReferenceTeamID</b>	Text	Optional	FALSE	FALSE	This column Will be consumed when tenant configuration <b>EnableFlexibleHierarchy= True</b>
<b>ReferenceLevelID</b>	Text	Optional	FALSE	FALSE	This will be consumed when <b>EnableFlexibleHierarchy= True</b>
<b>RemoveTeam</b>	Boolean	Optional	FALSE	FALSE	Remove the team from the system.

	<p><b>Note:</b> Users can either define following Alignment Types:</p> <ul style="list-style-type: none"> <li>• Affiliation-based Alignments</li> <li>• Geo-based Alignments</li> <li>• Customer-based Alignments</li> </ul>
---	--

## Employee Changes

Name	Type	Required	Default	Sample Value	Description
<b>EmployeeId</b>	Text	Yes (Primary)	NA	1A0301C	Defines the unique identifier of the Employee to be added in the system.
<b>EmployeeName</b>	Text	Yes	NA	Joseph N NewellA	Name of the Employee to be added in the system.
<b>EmployeeLogin</b>	Text	Yes	NA	Joseph.N. Newell	Username of the Employee while logging into the system.
<b>EmployeeCategory</b>	Text	Yes		Field/HQ	It can be either Field or HQ. The system will not accept any other value.
<b>HireDate</b>	Text	Yes			Date of hire of the employee recorded in the system.
<b>TerminationDate</b>	Text	Optional			Date of termination recorded in the system.
<b>TerminationType</b>	Text	Optional			Type of termination which can be Compliance, Retirement, Death and Performance.
<b>RemoveEmployee</b>	Boolean	Optional	FALSE	FALSE	Remove the Employee from the system.



**Note:** The following API helps to maintain the list of termination types:

- **POST:** /personnels/termination-types
- **Sample Body:** ["Compliance", "Performance", "Death", "Retirement"]
- It is not possible to create matrix using the names below because these are reserved keywords. Additionally, any existing matrix with these names must be archived.
- **Names:** "HireDate," "TerminationDate," "TerminationType"

## Employee Address Changes

Name	Type	Required	Default	Sample Value	Description
<b>EmployeeId</b>	Text	Yes (Primary)	NA	1A0301C	Defines the unique identifier of the Employee being created.
<b>EmployeeAddressId</b>	Text	Yes (Primary)	NA	100 Grand St	Since an Employee can have multiple addresses, this property defines the unique identifier of the customer's address.
<b>EmployeeAddress 1</b>	Text	Yes	NA	Mansfield Ave	Address line1 for the address being added.
<b>EmployeeAddress 2</b>	Text	Optional	NA	Mansfield Ave	Address line2 for the address being added.
<b>EmployeeCity</b>	Text	Yes	NA	New Britain	Since an Employee can have multiple addresses, this property defines the city of the Employee's address.
<b>EmployeeState</b>	Text	Yes	NA	CT	Since an Employee can have multiple addresses, this property defines the state of the Employee's address.
<b>EmployeeCountry</b>	Text	Yes	NA	UK	Since an Employee can have multiple addresses, this property defines the country of the Employee's address.
<b>EmployeeCounty</b>	Text	Optional	NA	Fairfax	Since an Employee can have multiple addresses, this property defines the county of the Employee's address.

Name	Type	Required	Default	Sample Value	Description
<b>PrimaryAddress</b>	Boolean	Yes	FALSE	FALSE	Indicates whether the address is primary or not.
<b>EmployeeAddress Type</b>	Text	Yes	NA	Work, Home, Other, etc.	Type of address.
<b>EmployeeGeoCode</b>	Text	Yes	NA	6052	Since an Employee can have multiple addresses, this property defines the zip code of the Employee's address.
<b>RemoveEmployee Address</b>	Boolean	Optional	FALSE	FALSE	Remove the Employee's address.
<b>EmployeeLatitude</b>	Numeric	Optional	42.050291	42.0502791	Default value from configuration n setting.
<b>EmployeeLongitude</b>	Numeric	Optional	42.0502791	42.0502791	Default value from configuration setting.

## Employee Assignment Changes

Name	Type	Required	Default	Sample Value	Description
<b>EmployeeAssignmentId</b>	Text	Yes (Primary)	NA	06001A	Defines the unique identifier of the assignment to be added and assigned to the Employee in the system.
<b>WorkUnitId</b>	Text	Yes	NA	1A0301C	Defines the unique identifier of the Work Unit to be added for assignment.
<b>StartDate</b>	Text	Yes	NA	01/01/2024	Defines the context of the assignment.
<b>EndDate</b>	Text	Optional	NA	01/01/9999	Remove employee assignment from the system
<b>EmployeeId</b>	Text	Yes	NA	35.00	Defines the unique identifier of the employee who will be owning the assignment.
<b>Effort</b>	Decimal	Optional	100	100	Effort allocation for the assignment.
<b>RemoveEmployeeAssignment</b>	Boolean	Optional	FALSE	FALSE	Remove the assignment from the system.
<b>PrimaryAssignment</b>	Boolean	Yes	FALSE	FALSE	Indicates whether the assignment is primary or not.

### Employee Assignment Changes (Applicable only for DR instances)

Name	Type	Required	Default	Sample Value	Description
<b>EmployeeAssignm entId</b>	Text	Yes (Primary)	NA	E123	Defines the unique identifier of the Position ID to be added for assignment changes.
<b>WorkUnitId</b>	Text	Yes	NA	ORG_1C A0301C	Defines the unique identifier of the employee who will be owning the assignment.
<b>PositionId</b>	Text	Yes	NA	1000189	Time to complete the assignment
<b>EmployeeId</b>	Text	Yes	NA	EMP3114 2	Indicates whether the assignment is primary or not.
<b>Effort</b>	Decimal	Optional	100	Decimal – 100.00	Date from which the record should be started in the system.
<b>PrimaryAssignmen t</b>	Boolean	Yes	NA	Default - True	Date from which the record will be inactive in the system.
<b>StartDate</b>	Text	Yes	NA	01/01/202 4	Defines the context of the assignment.
<b>EndDate</b>	Text	Optional	NA	01/01/999 9	Remove employee assignment from the system.
<b>AssignmentContex t</b>	Text	Yes	NA	Backfill	Defines the unique identifier of the Position ID to be added for assignment changes.
<b>RemoveEmployee Assignment</b>	Optional	Yes	NA		Defines the unique identifier of the employee who will be owning the assignment.

**Note:**

- For Employee Assignment Changes, Effective date input will be considered at record level, not at the API header level.
- The following API helps to maintain the list of context:
  - **POST:** /assignments/context
  - **Sample Body:** { "Context":["Backfill", "MBA Hire", "Intern","Additional Access"]}
- Context value provided by the user must match the master value.

## Employee Events

Name	Type	Required	Default	Sample Value	Description
<b>EmployeeId</b>	Text	Yes	NA	JC005	Defines the unique identifier of the Employee in the system.
<b>EventDate</b>	Date	Yes	NA	01/07/2025	Event Start Date
<b>EventType</b>	Decimal	Yes	NA	FIELDSTAR, FIELDEND	Type of Event

**Note:**


- This contract is valid only when the client has enabled the instance level config: **EnableFieldEventTracking**
- Values that are allowed as part of EventType field – **FIELDSTART, FIELDEND**. No other values allowed.
- EventDate corresponds to the effective date on which this event record will be ingested.
- Once enabled, this configuration **cannot be reverted (disabled)**.

Name	Type	Required	Default	Sample Value	Description
<b>ProductId</b>	Text	Yes	NA	PCP2	
<b>RoleId</b>	Text	Yes	NA	Primary Care 2	
<b>DefaultWeight</b>	Decimal	Yes	NA	100.00	
<b>Default</b>	Boolean	Yes	NA	TRUE	Allows user to define if the Product will be used by default for this Role while defining the Assignment.
<b>RemoveMapping</b>	Boolean	Optional	FALSE	FALSE	Remove the role product mapping from the system.

### Employee Certification

Headers	Type	Required	Sample Value	Description
<b>EmployeeID</b>	Text	Yes	C001	Unique Identifier for Sales Rep in ZFD
<b>CertificationType</b>	Text	Yes	State License, Product	Categorization of Certification (Role based, Line of therapy, indication based etc)
<b>CertificationTypeValue</b>	Text	N – If LOV is not defined Y- If LOV is defined	Oregon	To Track State level licenses/ Certification
<b>CertificationID</b>	Text	Yes	P1	
<b>CertificationIssueDate</b>	Date	Y	07/01/2025	To Track Certification completion date

Headers	Type	Required	Sample Value	Description
<b>CertificationExpiryDate</b>	Date	Y	06/15/2026	To Track certification expiry date
<b>Description</b>	Text	N	This certification is for Advance MSL role	
<b>RemoveEmployeeCertificaiton</b>	Boolean	N	True	Removes the employee certification record

	<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• User should be able to upload employee certification records for various Certification Type in single file</li> <li>• Users should be able to upload records with pre-defined Certification Type LOV- via support route in FD-R9.1</li> <li>• Users should be able to upload records with pre-defined Certification Type Value LOVs- via support route in FD-R9.1</li> </ul>
--	---

### Product Assignment Changes

Name	Type	Required	Default	Sample Value	Description
<b>ProductId</b>	Text	Yes (Primary)	NA	CHA 31	Defines the unique identifier of the product assignment to be added in the system.
<b>WorkUnitId</b>	Text	Yes (Primary)	NA	9A99999	Defines the unique identifier of the Work Unit to be added for product assignment.
<b>ProductAssignmentWeight</b>	Decimal	Yes	NA	33.33	Stores information about the product assignment weight percent in the system.

<b>RemoveProductAssignment</b>	Boolean	Optional	FALSE	FALSE	Remove the product assignment from the system.
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### Product Assignment Changes (Applicable only for DR instances)

Name	Type	Required	Default	Sample Value	Description
<b>ProductId</b>	Text	Yes (Primary)	NA	E123	Defines the unique identifier of the product assignment to be added in the system.
<b>WorkunitId</b>	Text	Yes (Primary)	NA	ORG_1CA0301C	Defines the unique identifier of the Work Unit to be added for product assignment.
<b>PositionId</b>	Text	Yes	NA	ORG_1CA0301C_P1	Defines the unique identifier of the Position ID to be added for assignment changes.
<b>ProductAssignmentWeight</b>	Decimal	Y	NA	100	Stores information about the product assignment weight percent the system.
<b>RemoveProductAssignment</b>	Boolean	Optional	False	False	Remove the product assignment from the system.

### Delta Product Assignment Changes

Name	Type	Required	Default	Sample Value	Description
<b>ProductId</b>	Text	Y	NA	E123	Defines the unique identifier of the product to be added in the system.
<b>WorkunitId</b>	Text	Yes (Primary)	NA	ORG_1CA0301C	Defines the unique identifier of the Work Unit to be added for product assignment.
<b>RemoveProductAssignment</b>	Boolean	Yes	True/False		Remove the product from the system.

### Delta Product Assignment Changes (Applicable only for DR instances)

Name	Type	Required	Default	Sample Value	Description
<b>ProductId</b>	Text	Y	NA	E123	Defines the unique identifier of the product to be added in the system.
<b>WorkunitId</b>	Text	Yes (Primary)	NA	ORG_1CA0301C	Defines the unique identifier of the Work Unit to be added for product assignment.
<b>PositionId</b>	Text	Y	NA	ORG_1CA0301C_P1	Defines the unique identifier of the Work Unit to be added for position.
<b>RemoveProductAssignment</b>	Boolean	Yes	True/False		Remove the product from system.

### Product Changes

Name	Type	Required	Default	Sample Value	Description
<b>ProductId</b>	Text	Yes (Primary)	NA	AGE 1	Defines the unique identifier of the product to be added in the system.
<b>ProductName</b>	Text	Yes	NA	Agen	Name of the product to be added in the system.
<b>RemoveProduct</b>	Boolean	Optional	FALSE	FALSE	Remove the product from the system.

## Role Changes

Name	Type	Required	Default	Sample Value	Description
<b>RoleId</b>	Text	Yes (Primary)	NA	1	Defines the unique identifier of the role to be added in the system.
<b>RoleName</b>	Text	Yes	NA	PCP2Rep	Name of the role to be added in the system.
<b>RoleCategoryId</b>	Text	Yes	NA	PCP2	Defines the unique identifier of the category for the specific role.
<b>RemoveRole</b>	Boolean	Optional	FALSE	FALSE	Remove the role from the system.

## Role Category Changes

Name	Type	Required	Default	Sample Value	Description
<b>RoleCategoryId</b>	Text	Yes (Primary)	NA	PCP2	Defines the unique identifier of the category for the specific role.
<b>RoleCategoryName</b>	Text	Yes	NA	Primary Care 2	Name of the role category to be added in the system.
<b>RemoveRoleCategory</b>	Boolean	Optional	FALSE	FALSE	Remove the role category from the system.

## Team to Customer Type Changes

Name	Type	Required	Default	Sample Value	Description
<b>TeamId</b>	Text	Yes (Primary)	NA	TT1	Defines the unique identifier of the team to be added to the customer type in the system.
<b>CustomerTypeId</b>	Text	Yes (Primary)	NA	2	Id of the customer type to which the team will be added.
<b>RemoveMapping</b>	Boolean	Optional	FALSE		Remove the team from the customer type mapping.
<b>AllowProductLevelAssignment</b>	Boolean	Optional	False		This flag depends on Team Settings. The flag value can only be updated if PLA is enabled for the team.

## Level to Role Changes

Name	Type	Required	Default	Sample Value	Description
<b>LevelId</b>	Text	Yes (Primary)	NA	1	Defines the unique identifier of the level to be added to the role mapping in the system.
<b>RoleId</b>	Text	Yes (Primary)	NA	A001	Defines the unique identifier of the role to which the level will be added.
<b>UsesEffort</b>	Boolean	Optional	FALSE	FALSE	
<b>RemoveMapping</b>	Boolean	Optional	FALSE	FALSE	Remove the level from the role mapping.

## Level to Country Changes

Name	Type	Required	Default	Sample Value	Description
<b>LevelId</b>	Text	Yes	NA	France	Defines the unique identifier of the level to be added to the role mapping in the system.
<b>CountryId</b>	Text	Yes	NA	FR	Defines the unique identifier of the country to which the level will be added.
<b>RemoveLeveltoCountryMapping</b>	Boolean	Optional	FALSE	FALSE	Remove the level from the country mapping.

## Level to Business Unit Changes

Name	Type	Required	Default	Sample Value	Description
<b>LevelId</b>	Text	Yes	NA	Oncology	Defines the unique identifier of the level to be added to the role mapping in the system.
<b>BusinessUnitId</b>	Text	Yes	NA	BU_oncology	Defines the unique identifier of the business unit to which the level will be added.
<b>RemoveLeveltoBusinessUnitMapping</b>	Boolean	Optional	FALSE	FALSE	Remove the level from the business unit mapping.

## Work Unit Changes

Name	Type	Required	Default	Sample Value	Description
<b>WorkUnitId</b>	Text	Yes (Primary)	NA	9A99999	Defines the unique identifier of the Work Unit to be added in the system.
<b>WorkUnitName</b>	Text	Yes	NA	PCP2	Name of the Work Unit to be added in the system.
<b>WorkUnitParentId</b>	Text	Yes	NA	Unassigned	Defines the unique identifier of the parent Work Unit to be added in the system.
<b>LevelId</b>	Text	Yes	NA	11	Defines the unique identifier of the Work Unit level to be added.
<b>EnableExplicit Sharing</b>	Boolean		FALSE		This allows users to add WU to a Level with no connections with any team.
<b>RemoveWorkUnit</b>	Boolean	Optional	FALSE	FALSE	Remove the Work Unit from the system.
<b>WorkUnitType</b>	Text	Yes	NA	Field / Home Office	Type of Work Unit to be added in the system.
<b>RoleId</b>	Text	Yes	NA	5	Defines the unique identifier of the role to be assigned in the Work Unit.
<b>CountryId</b>	Text	Optional (required only if LevelId is of type Country)	NA		Defines the unique identifier of the country.
<b>BusinessUnitId</b>	Text	Optional (required only if LevelId is of type Business Unit)	NA		Defines the unique identifier of the business unit.

**Work Unit Changes (Applicable only for DR (Differential Resourcing) instances)**

<b>Name</b>	<b>Type</b>	<b>Required</b>	<b>Default</b>	<b>Sample Value</b>	<b>Description</b>
<b>WorkUnitId</b>	Text	Yes (Primary)	NA	E123	Defines the unique identifier of the Work Unit to be added in the system.
<b>WorkUnitName</b>	Text	Yes	NA	Hartford, CT	Name of the Work Unit to be added in the system.
<b>WorkUnitType</b>	Text	Yes	NA	Field / Home Office	Type of Work Unit to be added in the system.
<b>WorkUnitParentId</b>	Text	Yes	NA	ORG_1CA O301C_P1	Defines the unique identifier of the parent Work Unit to be added in the system.
<b>LevelId</b>	Text	Yes	NA	TERR001	Defines the unique identifier of the Work Unit level to be added.
<b>RoleId</b>	Text	Y - For DR disabled N - For DR enabled	FALSE	GPS001	Optional field. In this scenario, any data input related to roles will be ignored. However, in non-DR instances, roles are mandatory.
<b>RemoveWorkUnit</b>	Text	Optional	FALSE		Remove the Work Unit from the system.
<b>EnableExplicitSharing</b>	Boolean		FALSE		This allows users to add WU to a Level with no connections with any team.

## Work Unit Relationship Changes

This data contract enables the user to decouple or extend the relationship between a Work Unit and its parent within a specific team, based on requirements.

Name	Type	Default	Sample Value	Description
<b>WorkUnitId</b>	Text	True	WA001A	Defines the unique identifier of the Work Unit to be added in the system.
<b>WorkUnitParentId</b>	Text	True	WA001	Defines the unique identifier of the parent Work Unit to be added in the system.
<b>TeamId</b>	Text	True	GP_001	Defines the unique identifier of the team to be added to the customer type in the system.
<b>RemoveWorkUnitHierarchy</b>	Boolean	False	False	Remove the Work Unit hierarchy from the system.

## Position Changes (Applicable only for DR instances)

Name	Type	Required	Sample Value	Description
<b>PositionReferenceID</b>	Text	Optional	E123	Defines the unique identifier of the Position ID to be added for position assignment changes <b>Note:</b> Please note that this would be system generated if not provided by the user
<b>PositionID</b>	Text	Y	ORG_1CA0301C_P1	Defines the unique identifier of the Position ID to be added for position assignment changes.
<b>NewPositionID</b>	Text	Optional		Defines the unique identifier of the Position

Name	Type	Required	Sample Value	Description
				ID to be added for position assignment changes.
<b>WorkUnitID</b>	Text	Y	ORG_1CA0301C	Defines the unique identifier of the Work unit to be assigned in the Position.
<b>RoleID</b>	Text	Y	GPS001	Defines the unique identifier of the role to be assigned in the Position.
<b>RemovePosition</b>	Text	Optional	False	Flag to remove Position.

### Work Unit Id Changes

Name	Type	Required	Sample Value	Description
<b>CurrentWorkUnitId</b>	Text	Yes	9A99999	Existing Work Unit (Id on which update is required).
<b>NewWorkUnitId</b>	Text	Yes	9A99910	New Work Unit Id (Proposed Work Unit Id).

### Relationship Type Changes

Name	Type	Required	Default	Sample Value	Description
<b>RelationshipType Id</b>	Text	Yes (Primary)	NA	R1	Defines the unique identifier of the relationship type to be added based on the data contract.
<b>RelationshipType Name</b>	Text	Yes	NA	Managed	Name of the relationship type to be added based on the data contract.
<b>RemoveRelations hipType</b>	Boolean	Optional	FALSE	FALSE	Remove the relationship type from the system.

## Affiliation Group Configuration Changes

Name	Type	Required	Default	Sample Value	Description
<b>AffiliationGroupID</b>	Text	Yes (Primary)	NA	Config1	Defines the unique identifier for each Affiliation Group Configuration.
<b>AffiliationGroupName</b>	Text	Yes	NA	For IDNs	Captures the name of the configuration.
<b>Description</b>	Text	Optional	Null/ Empty	Applicable for teams with IDN	Captures a short description about the Configuration.
<b>RemoveAffiliationGroup</b>	Boolean	Optional	FALSE	FALSE	Removes the Affiliation Group Configuration from the system.

## Affiliation Network Data Upload Changes

Name	Type	Required	Default	Sample Value	Description
<b>ParentCustomerID</b>	Text	Yes (Primary Key/Identifier)	NA	CID1	Parent/ Driving Customer ID.
<b>ChildCustomerID</b>	Text	Yes (Primary Key/Identifier)	NA	CID2	Child/ Associated Customer ID.
<b>RelationshipTypeID</b>	Text	Yes (Primary Key/Identifier)	NA	R1	Describes relationship type between two customers.
<b>RemoveAffiliationNetwork</b>	Boolean	Optional	FALSE	FALSE	Remove the Affiliation Network from the system based on the data contract.



### Affiliation Group Configuration to Relationship Type Changes

Name	Type	Required	Default	Sample Value	Description
<b>AffiliationGroupID</b>	Text	Yes (Primary)	NA	Config1	Defines the unique identifier for each Affiliation Group Configuration.
<b>RelationshipTypeID</b>	Text	Yes	NA	R1	Defines the unique identifier for the Relationship type to be used for Affiliation Group Configuration mapping.
<b>RemoveMapping</b>	Boolean	Optional	FALSE	FALSE	Removes the Affiliation Group Configuration from the system.

### Affiliation Group Configuration to Team Mapping Changes

Name	Type	Required	Default	Sample Value	Description
<b>AffiliationGroupID</b>	Text	Yes (Primary)	NA	Config1	Defines the unique identifier for each Affiliation Group Configuration.
<b>TeamID</b>	Text	Yes (Primary)	NA	R1	Defines the unique identifier for the team to be used for Affiliation Group Configuration mapping.
<b>RemoveMapping</b>	Boolean	Optional	FALSE	FALSE	Removes the Affiliation Group Configuration from the system.

## Affiliation Group Data Upload Changes

Name	Type	Required	Default	Sample Value	Description
<b>AffiliationGroupID</b>	Text	Yes (Primary)	NA	Config1	Defines the unique identifier for each Affiliation Group data.
<b>ParentCustomerID</b>	Text	Yes	NA	CID1	Parent/ Driving Customer ID.
<b>ChildCustomerID</b>	Text	Yes	NA	CID2	Child/ Associated Customer ID.
<b>RelationshipTypeID</b>	Text	Yes	NA	R1	Relationship between <b>ParentCustomerID</b> and <b>ChildCustomerID</b> .
<b>RemoveAffiliation Group</b>	Boolean	Optional	FALSE	FALSE	Remove the Affiliation Group data from the

## Local Team Changes

Name	Type	Required	Default	Sample Value	Description
<b>LocalTeamID</b>	Text	Yes (Primary)	NA	TT1	Defines the unique identifier of the local team to be added in the system.
<b>LocalTeamName</b>	Text	Yes	NA	California Market	Name of the local team to be added in the system.
<b>RoleID</b>	Text	Yes	NA	Text1	Defines the unique identifier of the role to be assigned to the local team. <b>Note:</b> Please note that in DR-enabled instances, roles are an optional field. In this scenario, any data input related to roles will be ignored. However, in non-DR instances, roles are mandatory.
<b>RemoveLocal Team</b>	Boolean	Optional	FALSE	FALSE	Removes the local team from the system.

## Local Team Changes (Applicable for only DR Instances)

Name	Type	Required	Default	Sample Value	Description
<b>LocalTeamId</b>	Text	Yes (Primary)	NA	TT1	Defines the unique identifier of the local team to be added in the system.
<b>LocalTeamName</b>	Text	Yes	NA	California Market	Name of the local team to be added in the system.
<b>RoleId</b>	Text	Yes- For DR disabled. N- For DR enabled	NA	Text1	Defines the unique identifier of the role to be assigned to the local team. <b>Note:</b> Please note that in DR-enabled instances, roles are an optional field. In this scenario, any data input related to roles will be ignored. However, in non-DR instances, roles are mandatory.
<b>RemoveLocalTeam</b>	Boolean	Optional	FALSE	FALSE	Removes the local team from the system.

## Local Team Workunit Changes

Name	Type	Required	Default	Sample Value	Description
<b>LocalTeamId</b>	Text	Yes (Primary)	NA	TT1	Defines the unique identifier of the local team to be added for Work Unit mapping in the system.
<b>WorkUnitId</b>	Text	Yes (Primary)	NA	9A99999	Defines the unique identifier of the Work Unit which will be mapped by the local team.
<b>TeamId</b>	Text	Yes (Primary)	NA	R1	Defines the unique identifier of the team.
<b>RemoveMapping</b>	Boolean	Optional	FALSE	FALSE	Removes the local team from the Work Unit mapping.

## Call Plan Changes

Name	Type	Required	Sample Value	Description
<b>CustomerId</b>	Text	Yes	CID1	Customer's external unique identifier.
<b>WorkUnitId</b>	Text	Yes	GEO1	Work Unit's external unique identifier.
<b>NoOfCallsPlanned</b>	Number	Yes	20	Defines the number of call plan alignments.
<b>TeamId</b>	Text	Yes	TT_123	Defines the unique identifier of the team.
<b>RemoveCallPlan</b>	Boolean	Optional	TRUE/ FALSE	Removes the call plan from the system

## Call Plan with Product Changes

Name	Type	Required	Sample Value	Description
<b>CustomerId</b>	Text	Yes	CID1	Customer's external unique identifier.
<b>WorkUnitId</b>	Text	Yes	GEO1	Work Unit's external unique identifier.
<b>NoOfCallsPlanned</b>	Number	Yes	20	Defines the number of call plan alignments.
<b>TeamId</b>	Text	Yes	TT_123	Defines the unique identifier of the team.
<b>ProductId</b>	Text	Yes	P000G3	Defines the unique identifier of the product to be added to the system.
<b>RemoveCallPlan</b>	Boolean	Optional	TRUE/ FALSE	Removes the call plan from the system.

## Call Activity Changes

Name	Type	Required	Sample Value	Description
<b>CustomerId</b>	Text	Yes	CID1	Customer's external unique identifier.
<b>WorkUnitId</b>	Text	Yes	GEO1	Work Unit's external unique identifier.
<b>CallDate</b>	DateTime	Yes	2038-01-19 03:14:07	Date and time of the planned call. The format should be in <b>YYYY-MM-DD</b> and <b>HH:MM:SS</b> .
<b>TeamId</b>	Text	Yes	TT_123	Defines the unique identifier of the team.
<b>RemoveCallActivity</b>	Boolean	Optional	TRUE/ FALSE	Removes the Call Activity Alignment

## Call Activity with Product Changes

Name	Type	Required	Sample Value	Description
<b>CustomerId</b>	Text	Yes	CID1	Customer's external unique identifier.
<b>WorkUnitId</b>	Text	Yes	GEO1	Work Unit's external unique identifier.
<b>CallDate</b>	DateTime	Yes	2038-01-19 03:14:07	Date and time of the planned call. The format should be in <b>YYYY-MM-DD</b> and <b>HH:MM:SS</b> .
<b>TeamId</b>	Text	Yes	TT_123	Defines the unique identifier of the team.
<b>ProductId</b>	Text	Yes	PP000G3	Defines the unique identifier of the product to be added to the system.
<b>RemoveCallActivity</b>	Boolean	Optional	TRUE/ FALSE	Removes the Call Activity Alignment.

## Blacklist Customer Changes

Name	Type	Required	Sample Value	Description
<b>BlacklistCustomerId</b>	Text	Yes	CID1	Customer's external unique identifier.
<b>Remove</b>	Boolean	No	False	Defines a flag to make the customer blacklist or not.

## Blacklist Alignment Changes

Name	Type	Required	Sample Value	Description
<b>BlacklistCustomerId</b>	Text	Yes	CID1	Defines the unique identifier of the blacklist customer.
<b>WorkUnitId</b>	Text	Yes	GEO1	Defines the unique identifier of the Work Unit where the blacklisted customer belongs.
<b>TeamId</b>	Text	Yes	Team1	Defines the unique identifier of the team.
<b>Remove</b>	Boolean	No	False	Defines a flag to make the customer blacklist or not.

## Explicit Alignment from External Source Changes

Name	Type	Required	Sample Value	Description
<b>ExtCustomerId</b>	Text	Yes	CID1	Customer's external unique identifier.
<b>WorkUnitId</b>	Text	Yes	GEO1	Work Unit's external unique identifier.
<b>TeamId</b>	Text	Yes	TT_123	Defines the unique identifier of the team.
<b>RemoveExplicitAlignment</b>	Boolean	Optional	TRUE/False	Removes the explicit alignment.

## Geo Type Changes

Name	Type	Required	Sample Value	Description
<b>GeoTypeName</b>	Text	Yes	Bricks	Name of the type of Geo being created.
<b>GeoTypeId</b>	Text	Yes (Primary)	Brick123	ID of the type of Geo being created.
<b>RemoveGeoType</b>	Boolean	No	False	Removes the geo type from the system.

## Mirroring Changes

This data object allows you to configure mirroring relationships at Work Unit level across multiple teams via the Bulk File Import method. Refer the following data contract for details:

Name	Type	Required	Sample Value	Description
<b>DrivingTeamID</b>	Text	Yes	TEAM1	Specifies Driving Team's ID.
<b>DrivingWorkUnitId</b>	Text	Yes	WU1	Specifies Driving Work Unit's ID.
<b>DrivenTeamID</b>	Text	Yes	TEAM2	Specifies Driven Team's ID.
<b>DrivenWorkUnitId</b>	Text	Yes	WU2	Specifies Driven Work Unit's ID.
<b>RemoveMirroring</b>	Boolean	Yes	True/False	Always False if empty. If True, then remove relationship.

## Country Changes

Name	Type	Required	Sample Value	Description
<b>CountryId</b>	Text	Yes	France	Defines the unique identifier of the Country being created.
<b>CountryName</b>	Text	Yes	France	Defines the unique Name of Country Object being created.
<b>RemoveCountry</b>	Boolean	Optional	False	Remove Flag

## Business Unit Changes

Name	Type	Required	Sample Value	Description
<b>BusinessUnitId</b>	Text	Yes	Oncology	Defines the unique identifier of the Business Unit being created.
<b>BusinessUnitName</b>	Text	Yes	BU_Oncology	Defines the unique name of Business Unit object being created.
<b>RemoveBusinessUnit</b>	Boolean	Optional	False	Remove Flag

## Leave Changes

Name	Type	Required	Sample Value	Description
<b>EmployeeID</b>	Text	Yes	E123	Defines the unique identifier of the Employee being created.
<b>LeaveStartDate</b>	Text	Yes		Start date of the leave recorded in the system.
<b>LeaveEndDate</b>	Text	Yes		End date of the leave recorded in the system.
<b>LeaveType</b>	Text	Optional		Type of leave applied (sick, paid, unpaid and vacation)
<b>RemoveLeave</b>	Boolean	Optional		Remove the leave request from the system.



**Note:** The following API helps to maintain the master list of leaves:

**POST:** /employee-leave/leave-types

**Sample Body:** ["Sick", "Paid", "Unpaid", "Vacation"]

## Customer Alignment Remove

Name	Type	Required	Sample Value	Description
RemoveAlignmentCustomerId	Text	Yes (Primary)	A00003G3	Primary Key/ Identifier.
TeamId	Text	Yes (Primary)	T1003	Primary Key/ Identifier.
WorkUnitId	Text	Yes (Primary)	WU123	Primary Key/ Identifier.
RemoveAlignmentSource	Text	Yes (Primary)	CallPlan, etc.	Primary Key/ Identifier

## Product Assignment Delta

Name	Type	Required	Sample Value	Description
ProductID	Text	Yes (Primary)	P00003G3	Primary Key/ Identifier.
WorkUnitId	Text	Yes (Primary)	WU123	Primary Key/ Identifier.
RemoveProductAssignment	Boolean	Yes (Primary)	True/False	Primary Key/ Identifier.



**Note:** Call Plan, Call Activity, Explicit Alignment from external source supports delta addition/removal.

## Custom Field Import

### Custom Field Changes

Refer to the following data contracts to add, edit, or remove custom fields.

Name	Type	Required	Default	Sample Value	Description
<b>CustomFieldId</b>	Text	Yes	NA	Cust001	Primary identifier for Custom Field created.
<b>CustomFieldDisplay Name</b>	Text	Yes	NA	Eligible	Display name of Custom field.
<b>Description</b>	Text	Optional	NA		Details of custom field created.
<b>ObjectName</b>	Text	Yes	NA	Customer	Name of the object for which custom field is created.
<b>Data Type</b>	Text	Yes	NA	Boolean	Type of Custom field. (Text, Numeric, Date & Boolean)
<b>AllowSharingSplitting</b>	Boolean	Optional	False	False	Applicable for Only Numeric Field.
<b>SpecialCharacter</b>	Text	Optional		“\$”	Supported by only Text & Numeric Data Type Allowed Special Characters (#,%, (, ),+, - , \, /, [, ],  , {, }, <, >, ,, @, Rs, <del>₩</del> , ¢, £, \$, ¥, ₹, Pts, €, F, €) Special characters should be added in between double quotes "" Eg: ", "
<b>SpecialCharacterAtBeginning</b>	Boolean	Optional	False		Applicable for Numeric and Text custom field
<b>NumberRoundDecimalTo</b>	Number	Optional	Null		Values will be *0:*No decimal value. Value rounded off to int. Eg:

Name	Type	Required	Default	Sample Value	Description
					129.98 rounded to 130 1-5: round of to 1-5 decimal. Eg: 129.9876 with value as 2 will be converted to 129.99
<b>NumberShowCommaAfterEvery</b>	Number	Optional			Allowed values between 1-5
<b>CommaAtBeginning</b>	Boolean	Optional	Null		Flag to Show comma-based numbers provided in NumberShowCommaAfterEvery field.
<b>AllowUIEditability</b>	Boolean	Optional	False		This field is applicable for Employee and employee assignment objects.
<b>IsMandatoryField</b>	Boolean	Optional	False		This field is applicable for Employee object only.
<b>IsLovField</b>	Boolean	Optional	False		This field is applicable for Employee object with Datatype as text only.
<b>EmailFormatCheck</b>	Boolean	Optional	False		This field is applicable for Employee object with Datatype as text only.
<b>EndsWith</b>	Text	Optional	Null		This field is applicable for Employee object and DataType as text. If value is provided then this validation is enabled with the provided text.
<b>RemoveCustomField</b>	Boolean	Optional		False	Flag to remove Custom Field.
<b>limitToScenario</b>	Boolean	Optional		True	Restrict Scenario in scenario mode.

## Custom Field Visibility Changes (Team-Role)

Refer to the following data contracts to add, edit, or remove custom fields visibility.

Name	Type	Required	Default	Sample Value	Description
<b>CustomfieldId</b>	Text	Yes	Null		Custom Field Id for which visibility is to be updated.
<b>TeamId</b>	Text	Yes	Null		TeamId for which visibility is to be Updated.
<b>RoleId</b>	Text	Optional	Null		RoleId for which visibility is to be updated.
<b>RemoveCustomFieldRoleVisibility</b>	Boolean	Optional	Null		If True Remove visibility of the custom field for provided team Role combination.

## Custom Field Visibility Changes (Customer Type)

Refer to the following data contracts to add, edit, or remove custom field visibility for Customer type.



**Note:** This data contract is Applicable for Customer, Customer Team, Customer Product, Customer Address objects only.

Name	Type	Required	Default	Sample Value	Description
<b>CustomFieldId</b>	Text	Yes	Null		Custom Field id for which customer type visibility is to be provided.
<b>CustomerTypeId</b>	Text	Yes	Null		Customer type for which visibility is to be provided.
<b>RemoveCustomField CustomerType</b>	Boolean	Optional	Null		

## Customer Field Value Upload

This section will provide information about the ability to upload values for various custom fields available in the System.

### Base Object Details

Objects in which the Custom Field (Attribute values) can be uploaded with just the Primary Key(identifier) column along with CustomFieldId as column header.

Name	Type	Required	Default	Sample Value	Description
<b>CustomerId</b>	Text	Yes (Primary)	NA	A00003G3	Indicates Primary key/Identifier.
<b>CustomFieldId1</b>	Text	Optional	Null/Empty		Value of the custom field for the base object. For example, customer, product, etc.
<b>CustomFieldId2</b>	INT	Optional	Null/Empty		Value of the custom field for the base object. For example, customer, product, etc.
<b>CustomFieldId3</b>	Boolean	Optional	FALSE		Value of the custom field for the base object. For example, customer, product, etc.
<b>CustomFieldId4</b>	Date	Optional	Null/Empty		Value of the custom field for the base object. For example, customer, product, etc.

Following are the Objects where the Custom Field values can be uploaded using the Primary Key only:

Object Name	Primary Key
Customer	CustomerId
Geo Code	GeoCode
Employee	EmployeeId
Team	TeamId
Product	ProductId
Work Unit	WorkUnitId
Role	RoleId
Local Team	LocalteamId
Country	CountryId
Business Unit	BusinessUnitId
Position Custom Field	PositionID



**Note:** *Position Custom fields* are only supported **DR Enabled** instances, in both **Active** and **Scenario Modes**.


## Mapping Object Details

Objects in which same contract can be used to upload Custom Field (Attribute values), other existing fields including Primary Key (identifier) column, and CustomFieldId as column header.

Name	Type	Required	Default	Sample Value	Description
<b>RoleCategoryId</b>	Text	Yes (Primary)	NA	A00003G3	Indicates Primary key/Identifier.
<b>RoleCategoryName</b>	Text	Yes	NA	Primary Care 2	Specifies the name of the role category.
<b>RemoveRoleCategory</b>	Boolean	Optional	FALSE	FALSE	Remove the role category from the system.
<b>CustomFieldId1</b>	Text	Optional	Null/Empty		Value of the custom field for the base object. For example, customer, product, etc.
<b>CustomFieldId2</b>	INT	Optional	Null/Empty		Value of the custom field for the base object. For example, customer, product, etc.
<b>CustomFieldId3</b>	Boolean	Optional	FALSE		Value of the custom field for the base object. For example, customer, product, etc.
<b>CustomFieldId4</b>	Date	Optional	Null/Empty		Value of the custom field for the base object. For example, customer, product, etc.

Following are the Objects where the Custom Field values can be uploaded using the following required columns:

Object Name	Primary Key+ Required Fields
<b>Customer – Team</b>	CustomerId, TeamId
<b>Customer - Product</b>	CustomerId, ProductId
<b>Customer Address</b>	CustomerId, CustomerAddressId
<b>Role Category</b>	RoleCategoryId, RoleCategoryName
<b>Affiliation Network</b>	ParentCustomerId, ChildCustomerId, RelationshipTypeId
<b>Employee Assignment</b>	EmployeeAssignmentId, WorkunitId, primaryassignment, Effort, startdate, employeeId, PositionId (DR only)
<b>Product Assignment</b>	ProductId, WorkUnitId, productassignmentweigh, PositionId (DR only)
<b>Call Activity</b>	CustomerId, WorkUnitId, CallDate, TeamId
<b>Call Plan</b>	CustomerId, WorkUnitId, teamid, noofcallsplanned
<b>Explicit Alignments</b>	CustomerId, WorkUnitId, TeamId

 **Note: Customer -Team Object** is a mapping object created in the system to support Customer Team Level Custom field values.

## Customer Product Metrics

Name	Type	Required	Sample Value	Description
<b>CustomerID</b>	Text	Yes (Primary)	Customer1	Defines the unique identifier of the customer being created.
<b>ProductID</b>	Text	Yes (Primary)	Product1	Defines the unique identifier of the product to be added in the system.
<b>CustomerFieldID1</b>	Text	Optional	Segmentation	Defines the unique identifier of the customer field being created.
<b>CustomerFieldID2</b>	Text	Optional	Market Access	Defines the unique identifier of the customer field being created.

## List of Values (LOVs)

Name	Type	Required	Sample Value	Description
<b>ObjectName</b>	Text	Yes	Customer	Object for which custom field exists.
<b>CustomFieldId</b>	Text	Yes	Tier	The field for which the LOV is to be created / updated.
<b>Value</b>	Text	Yes	Tier1	List of values.
<b>Remove</b>	Boolean	Optional	False	Removes an existing value in LOV.




**Note:** You can upload up to 500 LOVs for available custom fields (of type Text). These LOVs can be used in rule builder to create Business Rules.

## Maximum Custom Field Volume

<b>Object</b>	<b>Full Volume in the System</b>
<b>Affiliation Network Attributes</b>	15
<b>Business Unit Attributes</b>	15
<b>Calculated Attribute formula for Customers</b>	15
<b>Calculated Attribute formula for ZIPs</b>	15
<b>Call Activity Attribute</b>	5
<b>Call Plan Attribute</b>	5
<b>Calculated Attributes formula for Work Units</b>	15
<b>Country Attributes</b>	15
<b>Customer Attribute</b>	300
<b>Customer-Team Attribute</b>	15
<b>Customer-Product Attribute</b>	32
<b>Employee Assignment Attribute</b>	15
<b>Employee Attribute</b>	40
<b>Explicit alignment from external Attribute</b>	5
<b>Work Unit Attribute</b>	15
<b>Local Team Attributes</b>	5
<b>Product assignment Attribute</b>	15
<b>Product Attribute</b>	15
<b>Role Attribute</b>	15
<b>Role Category Attribute</b>	15
<b>Team Attribute</b>	15
<b>Geo Attribute</b>	75


## Maximum Numeric Custom Fields at Instance Level

Object	Full Volume in the System
Customer	75
Geo	75
WorkUnit	10

	<b>Note:</b> These are for metrics which supports aggregation.
---	--

## Import Objects Supported in Scenario Mode

Object	Comment
Customer Alignment Changes	-
Employee Assignment	-
Geo Alignment Changes	-
Level Changes	Changes allowed at non-shared level only
Level to Business Unit Changes	Changes allowed at non-shared level only
Level to Country Changes	Changes allowed at non-shared level only
Level to Role Changes	-
Role to Product Changes	-
Product Assignment Changes	-
Product Assignment Delta	-
Team Changes	Only Team edits are supported. New teams cannot be created in scenario mode
Work Unit Id Changes	Changes allowed at non-shared level only
Work Unit Changes	Changes allowed at non-shared level only
Position Changes	Changes allowed at non-shared level only

	<b>Note:</b> To upload records in scenario mode, Scenario Name, and Scenario Effective date should be provided as unique identifiers for import operation.
---	--

## Conflict Types and Resolution Options

When uploading a record, there can be a scenario where a future version of the record may exist. In such a case, the system may find a conflict and the user is asked to select a resolution option. A conflict can be simple or complex and there are two resolution options (**Apply Until** and **Override All**).

On selecting the **Apply Until** option, the system will apply the changes until it finds a conflict. Whereas on selecting the **Override All** option, the system overrides all the conflicts and proceeds with the uploading process.

When uploading records in bulk, if the user sets the **IsOverride** flag to **true**, the system will override all the conflicts and if it is set to **false**, the system will apply the changes until it finds a conflict.



**Note:** For simple conflict, you can use both the resolution options. However, for complex conflict, only Apply Until resolution is applicable. If the **IsOverride** flag is set to true in case of complex conflict, the system will ignore this record.

The following table shows the objects and their properties for which there can be conflicts, type of conflict and type of resolution user can select to resolve the conflict:

<b>Object</b>	<b>Properties</b>	<b>Conflict Type</b>	<b>Smart Removal - Auto Adjusting End Date for Dependent Objects (Mandating) in case of Removal</b>
<b>Customer Type Changes</b>	Customer Type Name	Simple	No
<b>Customer Changes</b>	Customer Name Customer Type Id** (Editable only if No Dependent Alignment Should exist)	Simple Complex (Customer Type Id)	Yes
<b>Customer Address Changes</b>	Customer Address 1 & 2 City, State, Country, County, Primary Address, Customer Address Type, Geo Code, lat, Long, Eligible For Alignment.	Simple	No
<b>Geo(Zip) Code</b>	Name, City, State, Country, County (All properties)	Simple	Yes
<b>Customer Alignment</b>	Work Unit Id Alignment Weight	Simple	No
<b>Geo(ZIP) Alignment changes</b>	Work Unit Id Alignment Weight	Simple	No
<b>Level Changes</b>	Level Name Parent Level Id	Simple Complex (Parent Level Id)	Yes
<b>Team Changes</b>	Team Name Lowest Level Id (when no dependant mapping exist) Enable Shared Alignment	Simple Complex (lowest level Id)	Yes

Object	Properties	Conflict Type	Smart Removal - Auto Adjusting End Date for Dependent Objects (Mandating) in case of Removal
	Sum weight 100% Allow Geo Based alignment (Only if no alignment is defined) GeoType Id (Only if no alignment is defined) Allow Customer Based Alignment (If no customer Alignment is present)		
<b>Employee</b>	Employee Name Category Hire Date (Only if no dependent mapping present) TerminationDate TerminationType	Simple	Yes
<b>Employee Address</b>	All Editable (Except - Employee Id & Address Id)	Simple	No
<b>Employee Assignment</b>	Employee Id Work Unit Id Effort Primary Assignment	Complex (All Editable properties)	No
<b>Employee Assignment (Applicable for DR enabled instance)</b>	Employee Id Position Id Work Unit Id Effort Primary Assignment	Complex (All Editable properties)	No
<b>Role Product Changes</b>	Default Weight Default Flag	Simple	No
<b>Product Assignment</b>	Product Id Work Unit Id AssignmentWeight	Simple	No
<b>Product Assignment (Applicable for DR enabled instance)</b>	Product Id Position Id Work Unit Id AssignmentWeight	Simple	No

<b>Object</b>	<b>Properties</b>	<b>Conflict Type</b>	<b>Smart Removal - Auto Adjusting End Date for Dependent Objects (Mandating) in case of Removal</b>
<b>Delta Product Assignments</b>	Product Id Work Unit Id	Simple	No
<b>Delta Product Assignments (Applicable for DR enabled instance)</b>	Product Id Position Id Work Unit Id	Simple	No
<b>Product Changes</b>	Product Name	Simple	No
<b>Role Changes</b>	Role Name Role Category	Simple	No
<b>Role Category Changes</b>	Role Category Name	Simple	No
<b>Team to Customer Type Changes</b>	NA	NA	No
<b>Level to Role</b>	UsesEffort	Simple	No
<b>Level to Country</b>	NA	NA	No
<b>Level to Business unit changes</b>	NA	NA	No
<b>WorkUnit</b>	Work Unit Id (No Future version should exist for same Id) Work Unit Name Role Parent Work Unit	Simple Simple Simple Complex (Parent Work unit)	Yes
<b>WorkUnit Changes (Applicable for DR Enabled instance)</b>	Work Unit Id (No Future version should exist for same Id) Work Unit Name Role Parent Work Unit	Simple Complex (Parent Work unit)	Yes
<b>Position (Applicable for DR enabled Instance)</b>	New Position Id Role Id	Simple	Yes

<b>Object</b>	<b>Properties</b>	<b>Conflict Type</b>	<b>Smart Removal - Auto Adjusting End Date for Dependent Objects (Mandating) in case of Removal</b>
<b>Work Unit ID changes</b>	New Workunit ID (No future version should exist)	Simple	No
<b>Relationship Type Changes</b>	RelationshipTypeName	Simple	No
<b>Affiliation Group Configuration changes</b>	AffiliaitonGroupName Description	Simple	No
<b>Affiliation Network Data upload changes</b>	NA	NA	No
<b>Affiliation Group Configuration to Relationship Type Changes</b>	Always full feed add operation	Simple	No
<b>Affiliation Group Configuration to Team Mapping Changes</b>	NA	NA	No
<b>Local team changes</b>	Local Team Name Role Id	Simple	Yes
<b>Local team changes (Applicable for DR enabled instance)</b>	Local Team Name Role Id	Simple	Yes
<b>Local Team Workunit Changes</b>	NA	NA	No
<b>Call Activity</b>	Calldate	Simple	Yes
<b>Call Planning</b>	No of calls planed	Simple	Yes
<b>Blacklist Customer Changes</b>	NA	NA	No
<b>Blacklist Alignment Changes</b>	NA	NA	No

<b>Object</b>	<b>Properties</b>	<b>Conflict Type</b>	<b>Smart Removal - Auto Adjusting End Date for Dependent Objects (Mandating) in case of Removal</b>
<b>Explicit Alignment from External Source Changes</b>	NA	NA	Yes
<b>Position (Applicable for DR enabled Instance)</b>	New Position Id Role Id	Simple	Yes
<b>Work Unit ID changes</b>	New Workunit ID (No future version should exist)	Simple	No
<b>Relationship Type Changes</b>	RelationshipTypeName	Simple	No
<b>Affiliation Group Configuration changes</b>	AffiliaitonGroupName Description	Simple	No
<b>Affiliation Network Data upload changes</b>	NA	NA	No
<b>Affiliation Group Configuration to Relationship Type Changes</b>	Always full feed add operation	Simple	No
<b>Affiliation Group Configuration to Team Mapping Changes</b>	NA	NA	No
<b>Local team changes</b>	Local Team Name Role Id	Simple	Yes
<b>Local team changes (Applicable for DR enabled instance)</b>	Local Team Name Role Id	Simple	Yes
<b>Local Team Workunit Changes</b>	NA	NA	No
<b>Call Activity</b>	Calldate	Simple	Yes

<b>Object</b>	<b>Properties</b>	<b>Conflict Type</b>	<b>Smart Removal - Auto Adjusting End Date for Dependent Objects (Mandating) in case of Removal</b>
<b>Call Planning</b>	No of calls planed	Simple	Yes
<b>Blacklist Customer Changes</b>	NA	NA	No
<b>Blacklist Alignment Changes</b>	NA	NA	No
<b>Explicit Alignment from External Source Changes</b>	NA	NA	Yes
<b>Geo Type Changes</b>	Geo Type Name	Simple	No
<b>Mirroring Changes</b>	NA	NA	No
<b>Country Changes</b>	Country Name	Simple	No
<b>Business Unit Changes</b>	Business Unit Name	Simple	No
<b>Leave Changes</b>	NA	NA	No
<b>Customer Alignment Remove</b>	NA	NA	NA
<b>Product Assignment Delta</b>	NA	NA	No
<b>Custom Fields</b>	NA	NA	Yes
<b>LOV</b>	NA	NA	Yes

## Import Object ID Reuse

This table provides a list of objects for which ID reuse operation supported.

Please Note that “Yes” indicates that if the object ID is archived user can reuse that specific ID from a future ID.

Object	Object Type	Id Reuse for Archived Objects	Id Reuse for Record Present in Future via UI
Customer Type Changes	Base	Yes	Yes
Customer Changes	Base	Yes	Yes
Customer Address Changes	Mapping	Yes	Yes
Geo(Zip) Code	Base	Yes	Yes
Customer Alignment	Mapping	Yes	Yes
Geo(ZIP) Alignment changes	Mapping	Yes	Yes
Level Changes	Base	Yes	Yes
Team Changes	Base	Yes	Yes
Employee	Base	Yes	Yes
Employee Address	Mapping	Yes	Yes
Employee Assignment	Mapping	Yes	Yes
Employee Assignment (Applicable for DR enabled instance)	Mapping	Yes	Yes
Role Product Changes	Mapping	Yes	Yes
Product Assignment	Mapping	Yes	Yes
Product Assignment (Applicable for DR enabled instance)	Mapping	Yes	Yes
Delta Product Assignments	Mapping	Yes	Yes
Delta Product Assignments (Applicable for DR enabled instance)	Mapping	Yes	Yes
Product Changes	Base	Yes	Yes
Role Changes	Base	Yes	Yes

<b>Object</b>	<b>Object Type</b>	<b>Id Reuse for Archived Objects</b>	<b>Id Reuse for Record Present in Future via UI</b>
<b>Role Category Changes</b>	Base	Yes	Yes
<b>Team to Customer Type Changes</b>	Mapping	Yes	Yes
<b>Level to Role</b>	Mapping	Yes	Yes
<b>Level to Country</b>	Mapping	Yes	Yes
<b>Level to Business unit changes</b>	Mapping	Yes	Yes
<b>WorkUnit</b>	Base	Yes	No
<b>WorkUnit Changes (Applicable for DR Enabled instance)</b>	Base	Yes	No
<b>Position (Applicable for DR enabled Instance)</b>	Mapping	Yes	No
<b>Work Unit ID changes</b>	Base	Yes	Yes
<b>Relationship Type Changes</b>	Base	Yes	Yes
<b>Affiliation Group Configuration changes</b>	Base	Yes	Yes
<b>Affiliation Network Data upload changes</b>	Mapping	Yes	Yes
<b>Affiliation Group Configuration to Relationship Type Changes</b>	Mapping	Yes	Yes
<b>Affiliation Group Configuration to Team Mapping Changes</b>	Mapping	Yes	Yes
<b>Local team changes</b>	Base	Yes	Yes
<b>Local team changes (Applicable for DR enabled instance)</b>	Base	Yes	Yes
<b>Local Team Workunit Changes</b>	Mapping	Yes	Yes
<b>Call Activity</b>	Mapping	Yes	Yes
<b>Call Planning</b>	Mapping	Yes	Yes

Object	Object Type	Id Reuse for Archived Objects	Id Reuse for Record Present in Future via UI
<b>Blacklist Customer Changes</b>	Base	Yes	Yes
<b>Blacklist Alignment Changes</b>	Mapping	Yes	Yes
<b>Explicit Alignment from External Source Changes</b>	Mapping	Yes	Yes
<b>Geo Type Changes</b>	Base	Yes	Yes
<b>Mirroring Changes</b>	Mapping	Yes	Yes
<b>Country Changes</b>	Base	Yes	Yes
<b>Business Unit Changes</b>	Base	Yes	Yes
<b>Leave Changes</b>	Mapping	Yes	Yes
<b>Customer Alignment Remove</b>	Mapping	Yes	Yes
<b>Product Assignment Delta</b>	Mapping	Yes	Yes
<b>Custom Fields</b>	Common	No	No
<b>LOV</b>	Mapping	Yes	Yes
<b>Rule Name</b>	NA	Yes	No

### Context Aware Objects Support

Import Objects
CustomerAlignment
ProductLevelAlignment
Blacklist Customer Alignment
Customer Alignment Source Removal

# Export API

Export API allows the application to have seamless integration with the downstream systems.

## Import Request

Headers	Type	Sample value
Userld	Text	zs\1223
Authorization	Text	
isAdminChange	Boolean	Yes
ContextName	Text	SalesCrediting

## Endpoint Details

Endpoint	URL	Type	Description
ExportRequest	https://fieldperformance.zaidyn.zsservices.com/{instance}/file/ExportRequest	POST	API Endpoint to export data.
JobStatus	https://fieldperformance.zaidyn.zsservices.com/{instance}/file/JobStatus?JobId=<jobid>	GET	Polling API Endpoint to check job status.
ExportSummary	https://fieldperformance.zaidyn.zsservices.com/{instance}/file/ExportSummary?JobId=<JobID>	GET	Allow users to view the output summary.
ExportRules	https://fieldperformance.zaidyn.zsservices.com/{instance}/rules/ExportRules	POST	Allows users to export all Rules.
ExportConfig	https://fieldperformance.zaidyn.zsservices.com/{instance}/alignmentgenerationconfigurations/exportConfig	POST	Allow users to export all alignment generation configuration.
Export-Affiliation	https://fieldperformance.zaidyn.zsservices.com/{instance}/alignmentgenerationconfigurations/export-affiliations	POST	Allow users to export all affiliation configuration.
Export-Guardrails	https://fieldperformance.zaidyn.zsservices.com/{instance}/guardrails/export-guardrails	POST	Allow users to export all Guardrails.

## Submit Export Request

The following table shows the input parameters for the **ExportRequest** endpoint.

Name	Type	Required	Default	Description
<b>EffectiveStartDate</b>	Date	No	NA	Effective start date of the record(s) from which the data can be exported.
<b>EffectiveEndDate</b>	Date	No	NA	Effective end date of the records until which the data can be exported. <b>Note:</b> Data can be fetched between two dates, but the second date can be optional if a snapshot is needed based on a single Effective Date.
<b>LastApprovedFrom</b>	Date	No	None	System date from which last changes can be exported.
<b>LastApprovedTo</b>	Date	No	None	System date until which last changes can be exported.
<b>ObjectDetails</b>	Text	No	All (All Objects)	Objects that need to be exported. Please refer to the list of objects which can be exported.
<b>Fields</b>	Text	No	All (All Fields for the specified object(s))	Fields that need to be exported are specified within tag/objects. If no field value is given, then all available fields will be exported for the selected object(s).
<b>Filter</b>	Text	No	None (Full data will be exported if no filters shared)	Based on Tag exported, this can be optional when multiple tags are requested. For example, user might want to filter Alignments by Team and export data for a specific team. Users can also apply filters to objects as per the headers available in the object.
<b>AddCustomFields</b>	Boolean	No	False	Specifies if the custom fields should be exported along with the base data.



**Note:** On submitting the export request, all the objects (shown in the later sections) are exported, except the Cycle Plan object. Therefore, to export the Cycle Plan object, you need to explicitly specify the TeamId parameter of the object.

## Endpoint

### URL

POST <context-path>/ExportRequest

## Input Format

### JSON

```
{ "EffectiveStartDate": "XX/XX/XXXX",  
  
  "EffectiveEndDate": "XX/XX/XXXX",  
  
  "LastApprovedFrom": "XX/XX/XXXX",  
  
  "LastApprovedTo": "XX/XX/XXXX",  
  
  "AddCustomFields": True,  
  
  "ObjectDetails": xxx }
```

## Example 1

### JSON

```
{ "EffectiveStartDate" : "XX/XX/XXXX", "EffectiveEndDate" : "XX/XX/XXXX",  
  "LastApprovedStartDate" : "XX/XX/XXXX",  
  
  "LastApprovedEndDate" : "XX/XX/XXXX", "AddCustomFields" : True, "ObjectDetails": [  
  
  "ObjectDetails": [  
  
  {  
  
  "ObjectName": "Customer", "Filter":{  
  
  "Condition":{  
  
  "AND": [  
  
  { "=" : [
```

```
{ "Col":{
  "Name":"customer_name",
}
},
{
  "Literal":{ "Value":"CustName"
}
}
],
},
{ "IN":[
  { "Col":{
    "Name":"customer_id",
  }
}
}, [
  {
    "Literal":{
      "Value":"cust1"
    }
  },
  {

```

```
"Literal": "Value":"cust2"
}
}
]
]
}
]
}
}
},
{
"ObjectName": "Customer Alignment", "TeamIds": ["ID-1", "ID-3"]
}
]
```

## Example 2

### JSON

Case 1: Export with Single literal condition

```
{
"EffectiveStartDate": "####-##-##", "EffectiveEndDate": "####-##-##", "LastApprovedFrom" :
"####-##-##", "LastApprovedTo" : "####-##-##", "AddCustomFields": false, "ObjectDetails": [
{
"ObjectName": "WorkUnit",
"Filter": {
```

```
"Condition": {
  "IN": [
    { "Col": {
      "Name": "workunitName"
    }
  }, [
    {
      "Literal": {
        "Value": "#####"
      }
    }
  ]
}
]
]
}
}
}
]
}
}
```

Case 2: Export with multiple literal condition

```
{
  "EffectiveStartDate": "####-##-##", "EffectiveEndDate": "####-##-##", "LastApprovedFrom" :
  "####-##-##", "LastApprovedTo" : "####-##-##", "AddCustomFields": false, "ObjectDetails": [
  {
```

```
"ObjectName": "CustomerAlignment", "Filter": {  
  "Condition": {  
    "AND": [  
      {  
        "IN": [  
          { "Col": {  
            "Name": "teamid"  
          }  
        }, [  
          {  
            "Literal": {  
              "Value": "####"  
            }  
          }  
        ]  
      ]  
    },  
    {  
      "NOT IN": [  
        { "Col": {  
          "Name": "AlignmentSource"  
        }  
      }, [  
    ]  
  ]  
}
```

```
{
  "Literal": {
    "Value": "####"
  },
  {
    "Literal": {
      "Value": "####"
    }
  }
]
]
}
]
}
}
]
}
```

## Literal Export Conditions

The FD-R7 release introduces an enhancement that supports literal arrays in IN and NOT IN filters. This update simplifies the format for these filters, making it easier to work with multiple values.

### Old Format (Separate Input for Each Literal)

#### JSON

```
{
  "IN": [
    {
      "Col": {
        "Name": "Sales"
      }
    }, [
    {
      "Literal": {
        "Value": "10000"
      }
    },
    {
      "Literal": {
        "Value": "20000"
      }
    }
  ]
}
```

```
]
}
```

### New Format (Array Input for Literals)

#### JSON

```
{
  "IN": [
    {
      "Col": {
        "Name": "Sales"
      }
    },
    {
      "Literal": {
        "Value": ["10000", "20000"]
      }
    }
  ]
}
```



**Note:** System now supports both

- Separate input
- Array format for IN and NOT IN filters.



## Output Format

### JSON

```
{  
  " jobId ": xxx  
}
```

## Example

### JSON

```
{  
  " jobId ": <JOB-ID>  
}
```

## Additional Notes:

- The request body size for **Literal Export** must not exceed 256 KB.
- The export filter condition has been updated from **Last Updated Date** to **Last Approved Date**.
- Starting from the FD-R7 release, the **Custom Field Export** functionality has been updated. A file will now be generated even when no custom fields are associated with the entity.
  - When no custom fields are present, the file will include only the base field headers.

## Data Export Scenarios

The input parameters EffectiveStartDate, EffectiveEndDate, LastUpdatedDateFrom, and LastUpdatedDateTo can be used to export data for the following scenarios:

- **Scenario 1** – To export all the data for a specific date, users should specify only the EffectiveStartDate parameter. This will export all the data for the specified date. Foreexample, if a user wants to export all the data for January 1, 2021, then the EffectiveStartDate will be 01/01/2021.



**Note** is extra information needed to support a procedure or other content. Notes are tips, shortcuts or alternative approaches to the task at hand. Ignoring a note should have no negative consequences, but you might miss out on a useful tip.

- **Scenario 2** – To export all the data for a specific date range, users should specify the `EffectiveStartDate` and `EffectiveEndDate` parameters. This will export all the data for the specified date range. For example, if a user wants to export all the data from January 1, 2021 to January 7, 2021, then the `EffectiveStartDate` will be `01/01/2021` and `EffectiveEndDate` will be `01/07/2021`.
- **Scenario 3** – To export the data which includes only the delta changes, users should specify the `LastApprovedFrom` and `LastApprovedTo` parameters. This will export only the delta changes/recent changes for the specified date range. For example, if a user wants to export the most recent changes from January 1, 2021 to January 3, 2021, then the `LastApprovedFrom` will be `01/01/2021` and `LastApprovedTo` will be `01/03/2021`.

## Check Job Status

### Endpoint

#### URL

```
GET <context-path>/JobStatus?JobId=<JOB-ID>
```

### Output Format

#### JSON

```
{  
  
  "StartTime": "xxx",  
  
  "Status": "xxx", "IsSuccess": xxx, "FailureMessage": "", "RunTimeTicks": xxx  
  
}
```



## Example

### JSON

```
{  
  
  "StartTime": "2021-06-08 08:26:29.722567",  
  
  "Status": "Success", "IsSuccess": true, "FailureMessage": "", "RunTimeTicks": 1256620  
  
}
```

## View Export Summary

### Endpoint

### URL

```
GET <context-path>/ExportSummary?JobId=<jobid>
```

### Output Format

### JSON

```
{  
  
  "StartTime": "xxx",  
  
  "Status": "xxx", "IsSuccess": xxx, "FailureMessage": "", "RunTimeTicks": xxx,  
  "ExportFilePath": "xxx"  
  
}
```

## Example

### JSON

```
{  
  
  "StartTime": "2021-05-31 12:28:37.699295",
```

```
"Status": "Success", "IsSuccess": true, "FailureMessage": "", "RunTimeTicks": 7856020,

"ExportFilePath": "s3://aws-a0078-use1-00-q-s3b-shrd-spm-
ext01/out/{tenantcode}/exports/b95e0edc-c20b-11eb-983e-254e1d02ed4d/"

}
```



**Note:** The R6 release introduces a tenant-based folder structure in S3 buckets, which automatically organizes export and validation files by tenant. This enhancement improves the directory layout and ensures consistency across operations and environments.

## Export Rules

### Endpoint

#### URL

POST <context-path>/rules/ExportRules

E.g. POST <https://fieldperformance.zaidyn.ga.zsservices.com/uic-7004a/rules/ExportRules>

### Input Format

#### JSON

```
Headers: {

  userId: '', Authorization: '',

  effectiveDate: '2023/09/01'

}

QueryParams: {

  effectiveDate: '2023-09-01'

}
```

Please note that for business rule, Affiliation, and AGC exports, use the app code 7004 in the URL. For all other exports, use the app code 7101 in the URL.

## Output Format

### JSON

```
{
  "JobId": "",
  "ExportFilePath": "" }
}
```

Using this Export API, Rules will be exported at the File path with the following Column Headers.

Column Header Name	Type	Sample Value	Description
<b>rule_internal_id</b>	Numeric	BRM123	Provides internal Id of Rule.
<b>rule_name</b>	Text	Specialty Rule	Provides Rule Name.
<b>rule_type</b>	Text	Inclusion	Provides Type of Rule –Inclusion, Exclusion or Blacklist.
<b>rule_description</b>	Text	Rule for specialty inclusion	Short description provided by users while creating the Rule.
<b>rule_drop_reason</b>	Text	Specialty did not match	Provides details of drop reason as configured by user.
<b>rule_category_level</b>	Text	Global & Team Level	Provides Rule Category Level – Global &Team Level & Work Unit Level.
<b>query</b>	Text – SQL Query	SELECT vw_customer_base.customer_internal_id FROM vw_customer_base Left Join vw_customer_customer_field_	Provides SQL query based on defined condition.

Column Header Name	Type	Sample Value	Description
team_ids	[Text]	{TeamA1, Team A2}	Provides comma separated value for Team Ids.
customer_type_ids	[Numeric]	{IDN,HCP}	Provides list of Customer type Ids part of Rule.
rule_sequence	Numeric	1	Provides sequence of rules define.
start_date	Date	1/1/2022	Provides start date of Rule.
end_date	Date	31/12/022	Provides end date of Rule.
last_modified_date	Timestamp	7/20/2022 12:37:25 PM	Provides last modified date of Rule.
context_name	Text	Sales Crediting, Field Deployment	

## Export Alignment Generation Configuration

### Endpoint

#### URL

POST <context-path>/ alignmentgenerationconfigurations/exportConfig

### Input Format

#### JSON

```

Headers: {
  userId: '', Authorization: '',
  effectiveDate: '2023/09/01'
}

QueryParams: {
  effectiveDate: '2023-09-01'
}

```

## Output Format

### JSON

```
{  
  
  "ExportFilePath": ""  
  
}
```

Using this API alignment generation configuration will be exported with the following details.

Name	Type	Sample Value	Description
<b>team_id</b>	Text	{Team ID1}	Provides details of Team Id.
<b>customer_type_id</b>	Text	HCO	Provides individual customer type id details for configuration.
<b>alignment_type</b>	Text	Call Plan	Provides alignment type defined for the customer type.
<b>is_enabled</b>	Boolean	TRUE	True if is enabled. False if it is disabled.
<b>Script_Name</b>	Text	Call Plan generation	Provides name of the Custom Script.
<b>is_custom</b>	Boolean	TRUE	True if it is a custom AGC False if it is a Standard AGC.
<b>Variable_parameters</b>	Text	{'Min = 6'}	Provides the details of variable parameters selected by the user for selected custom script in JSON format.
<b>start_date</b>	Date	2023-02-02	Start date of configuration.
<b>end_date</b>	Date	2025-01-01	End date of configuration.
<b>last_updated_date_time</b>	Timestamp	2023-05-08 07:31:45.743556	Provides last updated date of configuration.

# Export Affiliation

## Endpoint

### URL

POST <context-path>/alignmentgenerationconfigurations/export-affiliations

## Input Format

### JSON

```
Headers: {  
  userId: '', Authorization: '',  
  effectiveDate: '2023/09/01'  
}  
  
QueryParams: {  
  effectiveDate: '2023-09-01'  
}
```

## Output Format

### JSON

```
{  
  "ExportFilePath": ""  
}
```

Using this API affiliation configuration will be exported with the following details.

Name	Type	Sample Value	Description
<b>team_id</b>	Text	{TeamID1}	Provides Team Id details for affiliation configuration.
<b>flattening_level</b>	Numeric	2	Provides flattening level defined for affiliation configuration.
<b>affiliation_approach</b>	Numeric	1	Provides details of affiliation approach.
<b>relationship_types</b>	[Text]	Reports to	Provides details of relationship types for configuration.
<b>customer_type</b>	Text	HCP	Provides customer type defined in the affiliation configuration.
<b>alignment_type</b>	Numeric	1	Provides combined value of Alignment Sources. Refer below details. Explicit (1, "Explicit"), ZipBased (2, "Zip Based"), CallPlan (4, "Call Plan"), CallActivity (8, "Call Activity"), ExplicitFromExternalSource (16, "Explicit From External Source"), Unaligned (32, "Unaligned"), Affiliation (64, "Affiliation"), Mirrored (128, "Mirrored"),
<b>Script_Name</b>	Text	Affiliation generation	Provides name of the Custom Script.
<b>is_custom</b>	Boolean	TRUE	True if it is a custom AGC False if it is a Standard AGC.
<b>Variable_parameters</b>	Text	{'Min = 6'}	Provides the details of variable parameters selected by the user for selected custom script in JSON format.
<b>start_date</b>	Date	2020-01-01	Stat date of affiliation configuration.
<b>end_date</b>	Date	9999-12-31	End date of affiliation configuration.
<b>last_updated_date_time</b>	Timestamp	2023-04-18 07:44:05.553639	Provides last updated date of affiliation configuration.

# Export Guardrails

## Endpoint

### URL

POST <context-path>/ guardrails/export-guardrails

## Input Format

### JSON

```
Headers: {  
  
  userId: '', Authorization: '',  
  
  effectiveDate: '2023/09/01'  
  
}
```

## Output Format

### JSON

```
{  
  
  "ExportFilePath": ""  
  
}
```

Using this API guardrails will be exported with the following details.

Name	Type	Sample Value	Description
name	Text	AlignmentIndex_Error	Name of Guardrail.
guardrail_type	Text	Threshold	Type of Guardrails – Threshold, Variance & Goal.
entity_type	Text	vw_customer_custom_field_base	Provides entity details based on which guardrails parameter is defined.

Name	Type	Sample Value	Description
role_ids	Text	{R1, R2}	Roles for which Guardrails is applicable. Provides comma separated values.
team_ids	Text	{TeamID1, TeamID2}	List of Teams for which Guardrails is applicable – Provides comma separated values.
custom_field	Text	No_of_Emails	Custom Field used in Guardrails.
value	Numeric	###	Provides details of parameter provided by user.
operator	Text	>,<	Multi Operator used in the Guardrail. <b>Note:</b> Threshold guardrails with range will not be part of guardrail export.
error_type	Text	Error	Type of Error – Warning/Error
custom_message	Text	{Guardrail Message}	Custom Message defined by users.
start_date	Date	1/1/2020	Start date of Guardrail.
end_date	Date	1/1/2044	End date of Guardrail.
last_modified_date	Timestamp	5/8/2023 8:50:08 AM	Last modified date.
is_active	Boolean	TRUE	Status of Guardrail.
context_name	Text	SalesCrediting, Field Deployment	

## Object Details

This section shows the object details for all the Export contracts.

### Customer Type Changes

Name	Type	Default	Sample Value	Description
<b>CustomerTypeId</b>	Text	NA	ACC	Defines the unique identifier of the type of customer being created.
<b>CustomerTypeName</b>	Text	NA	Account	Name of the type of customer being created.
<b>RemoveCustomer Type</b>	Boolean	FALSE	FALSE	Remove the customer type.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.

## Customer Changes


Name	Type	Default	Sample Value	Description
<b>CustomerId</b>	Text	NA	A00003G3	Defines the unique identifier of the customer being created.
<b>CustomerName</b>	Text	NA	CustomerName	Name of the customer being created.
<b>CustomerTypeId</b>	Text	NA	ACC	ID of the type of customer being created.
<b>RemoveCustomer</b>	Boolean	FALSE	FALSE	Remove the customer.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.

## Customer Address Changes

Name	Type	Default	Sample Value	Description
<b>CustomerId</b>	Text	NA	A00003G3	Defines the unique identifier of the customer being created.
<b>CustomerAddress Id</b>	Text	NA	123 North Terrace	Since a customer can have multiple addresses, this property defines the unique identifier of the customer's address.
<b>CustomerAddress 1</b>	Text	Null	Suite 456	Address line 1 for the address being added.
<b>CustomerAddress 2</b>	Text	Null	Suite 456	Address line 2 for the address being added.

Name	Type	Default	Sample Value	Description
<b>CustomerCity</b>	Text	NA	Evanston	Since a customer can have multiple addresses, this property defines the city of the customer's address.
<b>CustomerState</b>	Text	NA	IL	Since a customer can have multiple addresses, this Property defines the state of the customer's address.
<b>CustomerCountry</b>	Text	NA	USA	Since a customer can have multiple addresses, this property defines the country of the customer's address.
<b>CustomerCounty</b>	Text	Null	Fairfax County	Since a customer can have multiple addresses, this property defines the county of the customer's address.
<b>PrimaryAddress</b>	Boolean	FALSE	TRUE	Indicates whether the address is primary or not.
<b>CustomerAddress Type</b>	Text	NA	Work, Home, Other, etc.	Type of address.
<b>CustomerGeoCode</b>	Text	NA	78901	Since a customer can have multiple addresses, this property defines the zip code of the customer's address.
<b>RemoveCustomer Address</b>	Boolean	FALSE	FALSE	Remove the customer's address.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.
<b>CustomerLatitude</b>	Numeric	42.0502791	42.0502791	Default value from configuration setting.


Name	Type	Default	Sample Value	Description
<b>CustomerLongitude</b>	Numeric	- 87.6821998	- 87.6821998	Default value from configuration setting.
<b>EligibleForAlignment</b>	Boolean	FALSE	FALSE	This column will decide if the address can be used for generating ZIP based alignment.

	<b>Note:</b> You can configure Default Customer lat_longin configuration file. The configuration keys are default_customer_latitude and default_customer_longitude.
---	---

### Geo Code Changes


Name	Type	Default	Sample Value	Description
<b>GeoCode</b>	Text	NA	A00003G3	Add the Geo code in the system.
<b>GeoTypeid</b>	Text		ZIP/Brick	ID of the type of Geo being created.
<b>Name</b>	Text	NA	Zip Name	Name of the Geo code, which is being added.
<b>City</b>	Text	NA	Evanston	City where the Geo belongs.
<b>State</b>	Text	NA	IL	State where the Geo belongs.
<b>Country</b>	Text	NA	USA	Country where the Geo belongs.
<b>County</b>	Text	NA	Fairfax County	County where the Geo belongs.
<b>RemoveGeoCode</b>	Boolean	FALSE	FALSE	Remove the Geocode from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.

Name	Type	Default	Sample Value	Description
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.
<b>Latitude</b>	Decimal	NA		Latitude where the geo belongs.
<b>Longitude</b>	Decimal	NA		Longitude where geo belongs.
<b>Island</b>	Boolean	FALSE	FALSE	Indicates if a geo is an island

	<p><b>Note:</b> You can configure a Default Lat Long value for zips with no shapes (Typically referred as point zips) through a configuration file. The configuration name is <b>ZIP lat_long</b> &amp; keys are <b>default_zip_latitude</b> and <b>default_zip_longitude</b>.</p>
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## Geo Adjacency


Name	Type	Sample Value	Description
<b>Geo Code</b>	Char	0010	Geo Code
<b>Adjacent Geo Code</b>	Char	Is the geo code that is adjacent to the geo code	Adjacent Geo Code

	<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>The data exported would be fetched from the active and latest shape files in the system.</li> <li>Data to be exported for both US and Ex-US teams.</li> </ul>
---	--

## Customer Alignment Changes

Name	Type	Default	Sample Value	Description
<b>CustomerId</b>	Text	NA	06001A	Defines the unique identifier of the customer to be added for alignment changes.
<b>TeamId</b>	Text	NA	TT_123	Defines the unique identifier of the team to be added for alignment changes.
<b>WorkUnitId</b>	Text	NA	1A0301C	Defines the unique identifier of the Work Unit to be added for alignment changes.
<b>WorkUnitInternalId</b>	Text	NA	10000189	Defines the unique identifier of the work unit internal to be added for alignment changes.
<b>AlignmentWeight</b>	Decimal	100.00	35.00	Stores information about customer's weight percent aligned to a WorkUnit.
<b>AlignmentSource</b>	Text	NA	Call Plan	Source of the customer alignment.
<b>AlignmentSource Reason</b>	Text	NA		Provides the details of alignment source reason.
<b>AlignmentSource ReasonID</b>	Text	NA		Provides the unique ID of the affiliated customer which is driving the alignment.
<b>AlignmentAttribute</b>	Text	NA	Primary	Stores' information about customers attribute alignment to a Work Unit. Mandatory for teams for which Alignment Attribute is enabled.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.

Name	Type	Default	Sample Value	Description
LastUpdatedDate From	Date	NA		System date on which the last change was made to the record.
LastApprovedDate	Date	NA		System date on which the change was approved.



**Note:**

- Unaligned customers present on the same data contract will have blank
- **WorkUnitId** column.
- In the **AlignmentSourceReason** column,
  - When alignment source is affiliation, then this column will provide the source of customer details.
  - When alignment source is Geo, the Geo code will be provided.
  - In case of multiple source alignment reasons, separate rows will be displayed for each alignment source reason.

### Product Level Alignment Changes

Name	Type	Default	Sample Value	Description
CustomerId	Text	NA	06001A	Defines the unique identifier of the customer to be added for alignment changes.
TeamId	Text	NA	TT_123	Defines the unique identifier of the team to be added for alignment changes.
WorkUnitId	Text	NA	1A0301C	Defines the unique identifier of the Work Unit to be added for alignment changes.
AlignmentWeight	Decimal	100.00	35.00	Stores information about customer's weight percent aligned to a WorkUnit.
AlignmentSource	Text	NA	Call Plan	Source of the customer alignment.
AlignmentSource Reason	Text	NA		Provides the details of alignment source reason.

Name	Type	Default	Sample Value	Description
<b>AlignmentSource ReasonID</b>	Text	NA		Provides the unique ID of the affiliated customer which is driving the alignment.
<b>AlignmentAttribute</b>	Text	NA	Primary	Stores information about customers attribute alignment to a Work Unit. Mandatory for teams for which Alignment Attribute is enabled.
<b>ProductId</b>	Text	NA	Dental_345	Defines the unique identifier of the Product to be added for Product Level Alignment changes. Mandatory for teams for which Alignment Attribute is enabled.
<b>Product Name</b>	Text	NA	Ketrodol	Stores the information about Product Name.
<b>ProductWeight</b>	Decimal	NA	100	Stores information about Product's weight percent aligned against a Customer Alignment.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.
<b>LastApprovedDate</b>	Date	NA		System date on which the change was approved.

## Alignment Full Feed Changes

Name	Type	Default	Sample Value	Description
<b>ProductId</b>	Text	NA	Dental_345	Defines the unique identifier of the Product to be added for Product Level Alignment changes. Mandatory for teams for which Alignment Attribute is enabled.
<b>ProductName</b>	Text	NA	Ketrodol	Stores the information about Product Name.
<b>ProductWeight</b>	Decimal	NA	100	Stores information about Product's weight percent aligned against a Customer Alignment.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.
<b>LastApprovedDate</b>	Date	NA		System date on which the change was approved

## Geo Code Alignment Changes

Name	Type	Default	Sample Value	Description
<b>GeoCode</b>	Text	NA	06001A	Zip code to be added for alignment changes.
<b>TeamId</b>	Text	NA	TT_123	Defines the unique identifier of the team to be added for alignment changes.
<b>WorkUnitId</b>	Text	NA	1A0301C	Defines the unique identifier of the WorkUnit to be added for alignment changes.
<b>WorkUnitInternalId</b>	Text	NA	10000189	Defines the unique identifier of the Internal work unit added for alignment changes.
<b>AlignmentWeight</b>	Decimal	100.00	35.00	Stores information about the Zip's weight percentage aligned to a Work Unit.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.
<b>LastApprovedDate</b>	Date	NA		System date on which the change was approved.



**Note:** Unaligned ZIPs present on the same data contract will have blank **WorkUnitId** column.

## Level Changes

Name	Type	Default	Sample Value	Description
<b>LevelId</b>	Text	NA	1	Defines the unique identifier of the Work Unit level to be added.
<b>LevelName</b>	Text	NA	PCP2	Name of the Work Unit level to be added.
<b>LevelParentId</b>	Text	Null	2	Defines the unique identifier of the parent Work Unit level to be added.
<b>LevelType</b>	Text		Other/Country/Business Unit	Defines the type of level change.
<b>RemoveLevel</b>	Boolean	FALSE	FALSE	Remove the Work Unit level from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.

## Team Changes

Name	Type	Default	Sample Value	Description
<b>TeamId</b>	Text	NA	TT1	Defines the unique identifier of the team to be added in the system.
<b>TeamName</b>	Text	NA	PrimaryCar e	Name of the team to be added in the system.
<b>LowestLevelId</b>	Text	Null/Empty	1	Allows user to define the Level Id from which the levels are to be mapped with the team.
<b>TeamEnableSharedAlignment</b>	Boolean	FALSE	FALSE	Allows creation of Shared Alignments within the team.
<b>TeamEnableAlignmentWeightSumNotEqualTo100</b>	Boolean	FALSE	FALSE	Allows weight less than or greater than 100 in case of Shared Alignment.
<b>AllowDeltaOperationviaUIBRMSenarioPublish</b>	Boolean	FALSE	FALSE	
<b>AllowAlignmentAttribute</b>	Boolean	TRUE	TRUE	Allows users to define if Alignment attribute is supported in the team.
<b>AllowProductLevelAlignment</b>	Boolean	TRUE	TRUE	Allows users to define if product level alignment is supported in the team. <b>Note:</b> By default, the value is set to 'False.' This flag provides one time modification only. Once the user changes this value to 'True,' it cannot be reverted to 'False.'
<b>TeamEnableProductAllocationWeightSumNotEqualTo100</b>	Boolean	FALSE	FALSE	Allows users to enable when product allocation weight sum not equal to 100.
<b>AllowGeoBasedAlignment</b>	Boolean	TRUE	FALSE	Allows user to define if WorkUnit based Alignments are supported in the team. If users enable this flag, then they need to provide

Name	Type	Default	Sample Value	Description
				GeoTypeId (by default, zip will be the GeoTypeId).
<b>GeoTypeId</b>	Text	ZIP	ZIP1	Id of the type of Geo being created.
<b>AllowCustomerBasedAlignment</b>	Boolean	TRUE	FALSE	Allows user to define if Customer based Alignments are supported in the team.
<b>AffiliationEnabled</b>	Boolean	FALSE	FALSE	Allows user to define if Affiliation is supported in the team.
<b>RemoveTeam</b>	Boolean	FALSE	FALSE	Remove the team from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.

## Employee Changes

Name	Type	Default	Sample Value	Description
<b>EmployeeId</b>	Text	Yes (Primary)	1A0301C	Defines the unique identifier of the Employee to be added in the system.
<b>EmployeeName</b>	Text	Yes	Joseph N NewellA	Name of the Employee to be added in the system.
<b>EmployeeLogin</b>	Text	Yes	Joseph.N.Newell	Username of the Employee while logging into the system.
<b>EmployeeCategory</b>	Text	Yes	Field/HQ	It can be either Field or HQ. The system will not accept any other value.
<b>HireDate</b>	Text	Yes		Date of hire of the employee recorded in the system.
<b>TerminationDate</b>	Text	Optional		Date of termination recorded in the system.
<b>TerminationType</b>	Text	Optional		Type of termination which can be Compliance, Retirement, Death and Performance.
<b>RemoveEmployee</b>	Boolean	FALSE	FALSE	Remove the Employee from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.



**Note:** It is not possible to create matrix using the names below because these are reserved keywords. Additionally, any existing matrix with these names must be archived.

Names: "HireDate", "TerminationDate", "TerminationType"

## Employee Address Changes

Name	Type	Default	Sample Value	Description
<b>EmployeeId</b>	Text	NA	1A0301C	Defines the unique identifier of the Employee being created.
<b>EmployeeAddress Id</b>	Text	NA	100 GrandSt	Since an Employee can have multiple addresses, this property defines the unique identifier of the customer's address.
<b>EmployeeAddress 1</b>	Text	NA	Mansfield Ave	Address line 1 for the address being added.
<b>EmployeeAddress 2</b>	Text	NA	Mansfield Ave	Address line 2 for the address being added.
<b>EmployeeCity</b>	Text	NA	New Britain	Since an Employee can have multiple addresses, this property defines the city of the Employee's address.
<b>EmployeeState</b>	Text	NA	CT	Since an Employee can have multiple addresses, this property defines the state of the Employee's address.
<b>EmployeeCountry</b>	Text	NA	UK	Since an Employee can have multiple addresses, this property defines the country of the Employee's address.
<b>EmployeeCounty</b>	Text	NA	Fairfax	Since an Employee can have multiple addresses, this property defines the county of the Employee's address.
<b>PrimaryAddress</b>	Boolean	FALSE	FALSE	Indicates whether the address is primary or not.
<b>EmployeeAddress Type</b>	Text	NA	Work, Home, Other, etc.	Type of address.
<b>EmployeeGeoCode</b>	Text	NA	6052	Since an Employee can have multiple addresses, this

Name	Type	Default	Sample Value	Description
				property defines the zip code of the Employee's address.
<b>RemoveEmployee Address</b>	Boolean	FALSE	FALSE	Remove the Employee's address.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.
<b>EmployeeLatitude</b>	Numeric	42.0502791	42.0502791	Default value from configuration setting.
<b>EmployeeLongitude</b>	Numeric	42.0502791	42.0502791	Default value from configuration setting.

### Employee Assignment Changes


Name	Type	Default	Sample Value	Description
<b>EmployeeAssignmentId</b>	Text	NA	06001A	Defines the unique identifier of the assignment to be added and assigned to the Employee in the system.
<b>WorkUnitId</b>	Text	NA	1A0301C	Defines the unique identifier of the Work Unit to be added for assignment.
<b>WorkUnitInternalId</b>	Text	NA	10000189	Defines the unique identifier of the Work Unit Internal to be added for assignment.
<b>EmployeeId</b>	Text	NA	35.00	Defines the unique identifier of the employee who will be owning the assignment.

Name	Type	Default	Sample Value	Description
<b>Effort</b>	Decimal	100	100	Time to complete the assignment.
<b>RemoveEmployee Assignment</b>	Boolean	FALSE	FALSE	Remove the assignment from the system.
<b>PrimaryAssignment</b>	Boolean	FALSE	FALSE	Defines the unique identifier of the primary assignment being created.
<b>StartDate</b>	Date	NA	01/01/2018	Effective Start date of the assignment.
<b>EffectiveEndDate</b>	Date	End Date of the WorkUnit must be considered as default value when empty.	01/01/2018	Effective End date of the assignment.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.
<b>AssignmentContext</b>	Text	NA	Backfill	Defines the unique identifier of the Assignment Context to be added in the system.
<b>LastApprovedDate</b>	Date	NA		System date on which the change was approved.

## Employee Assignment Changes (Applicable only for DR instances)

Name	Type	Default	Sample Value	Description
<b>EmployeeAssignmentId</b>	Text	NA	AE001	Defines the unique identifier of the assignment to be added and assigned to the Employee in the system.
<b>WorkUnitId</b>	Text	NA	010A1C	Defines the unique identifier of the Work Unit to be added for assignment.
<b>WorkUnitInternalId</b>	Text	NA	10000189	Defines the unique identifier of the Work Unit ID to be added for assignment.
<b>Position Reference ID</b>	Text	NA	CD93	Defines the unique identifier of the Position Reference ID to be added for assignment.
<b>PositionID</b>	Text	NA	AE93	Defines the unique identifier of the Position to be added for assignment.
<b>EmployeeId</b>	Text	NA	E001	Defines the unique identifier of the Employee ID being created.
<b>Effort</b>	Text	NA	100.00	Time to complete the assignment.
<b>RemoveEmployee Assignment</b>	Text	NA	FALSE	Remove Employee Assignment from the system.
<b>PrimaryAssignment</b>	Boolean	FALSE	FALSE	Defines the unique identifier of the primary assignment being created.
<b>StartDate</b>	Date	NA	FALSE	Date from which the record should be active in the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.

Name	Type	Default	Sample Value	Description
LastUpdatedDate Form	Date	NA		Date from which the record will be updated from the system.
AssignmentContext	Text	NA	Intern	Defines the unique identifier of the Assignment Context to be added in the system.
LastApprovedDate	Date	NA		System date on which the change was approved.



**Note:** For Employee Assignment Changes, Effective date input will be considered at record level, not at the API header level.

## Employee Events

Name	Type	Sample Value	Description
EmployeeId	Text	AE001	Unique Employee ID
FieldStartEvent	Text	FieldStart	Indicates the event detail
FieldStartDate	Date	01/07/2025	Field Start Event Date.
FieldEndEvent	Text	FieldEnd	Indicated Event Detail
FieldEndDate	Date	01/07/2030	Field End Event Date
EffectiveEndDate	Date	01/07/2030	Same as FieldStart event date, retained for consistency in export structure.
EffectiveStartDate	Date	01/07/2030	Same as FieldEnd event date, retained for consistency in export structure.
LastUpdatedDate	Date	01/07/2030	Max (fieldstart, fieldend) event date.

## Employee Certification

Headers	Type	Sample Value	Description
EmployeeID	Text	C001	Unique Identifier for Sales Rep in ZFD
CertificationID	Text	State License, Product	Categorization of Certification (Role based, Line of therapy, indication based etc)
CertificationType	Text	Oregon	To Track State level licenses/ Certification
CertificationTypeValue	Text	P1	
EffectiveStartDate	Date	07/01/2025	To Track Certification completion date
EffectiveEndDate	Date	06/15/2026	To Track certification expiry date
Description	Text	This certification is for Advance MSL role	
RemoveStartDate	Date	06/16/2026	Displays the date form which record will not be shown in system
Last Updated Date	Date	07/01/2025	Displays date when last this record was modified



**Note:**

- Export File Name: EmployeeCertification
- Applicable for both Delta and Full Feed export

## Role Product Changes

Name	Type	Default	Sample Value	Description
<b>ProductId</b>	Text	NA	PCP2	
<b>RoleId</b>	Text	NA	Primary Care 2	
<b>DefaultWeight</b>	Decimal	NA	100.00	
<b>Default</b>	Boolean	NA	TRUE	Allows user to define if the Product will be used by default for this Role while defining the Assignment.
<b>RemoveMapping</b>	Boolean	FALSE	FALSE	Remove the role product mapping from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.

## Product Assignment Changes

Name	Type	Default	Sample Value	Description
<b>ProductId</b>	Text	NA	CHA 31	Defines the unique identifier of the product assignment to be added in the system.
<b>WorkUnitId</b>	Text	NA	9A99999	Defines the unique identifier of the Work Unit to be added for product assignment.
<b>WorkUnitInternalID</b>	Text	NA	10000189	Defines the unique identifier of the Work Unit internal ID to be added for assignment.

Name	Type	Default	Sample Value	Description
<b>ProductAssignmentWeight</b>	Decimal	NA	33.33	Stores information about the product assignment weight percent in the system.
<b>RemoveProductAssignment</b>	Boolean	FALSE	FALSE	Remove the product assignment from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.
<b>LastApprovedDate</b>	Date	NA		System date on which the change was approved

### Product Assignment Changes (Applicable only for DR instances)

Name	Type	Default	Sample Value	Description
<b>ProductId</b>	Text	NA	CHA 31	Defines the unique identifier of the product assignment to be added in the system.
<b>WorkUnitId</b>	Text	NA	9A99999	Defines the unique identifier of the Work Unit to be added for product assignment.
<b>WorkUnitInternalId</b>	Text	NA	10000189	
<b>PositionReference ID</b>	Text	NA	CD93	Defines the unique identifier of the Position Reference ID to be added for assignment.
<b>PositionID</b>	Text	NA	AE93	Defines the unique identifier of the Position to be added for assignment.

Name	Type	Default	Sample Value	Description
<b>ProductAssignmentWeight</b>	Text	NA	FALSE	Defines the unique identifier of the product assignment weight for the given assignment.
<b>RemoveProductAssignment</b>			FALSE	Remove product assignment from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate Form</b>	Date	NA		Date from which the record will be updated from the system.
<b>LastApprovedDate</b>	Date	NA		System date on which the change was approved.

## Product Changes

Name	Type	Default	Sample Value	Description
<b>ProductId</b>	Text	NA	AGE 1	Defines the unique identifier of the product to be added in the system.
<b>ProductName</b>	Text	NA	Agen	Name of the product to be added in the system.
<b>RemoveProduct</b>	Boolean	FALSE	FALSE	Remove the product from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.

<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.

## Role Changes

<b>Name</b>	<b>Type</b>	<b>Default</b>	<b>Sample Value</b>	<b>Description</b>
<b>RoleId</b>	Text	NA	1	Defines the unique identifier of the role to be added in the system.
<b>RoleName</b>	Text	NA	PCP2 Rep	Name of the role to be added in the system.
<b>RoleCategoryId</b>	Text	NA	PCP2	Defines the unique identifier of the category for the specific role.
<b>RemoveRole</b>	Boolean	FALSE	FALSE	Remove the role from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.


## Role Category Changes

Name	Type	Default	Sample Value	Description
<b>RoleCategoryId</b>	Text	NA	PCP2	Defines the unique identifier of the category for the specific role.
<b>RoleCategoryName</b>	Text	NA	Primary Care 2	Name of the role category to be added in the system.
<b>RemoveRoleCategory</b>	Boolean	FALSE	FALSE	Remove the role category from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.

## Team to Customer Type Changes

Name	Type	Default	Sample Value	Description
<b>TeamId</b>	Text	NA	TT1	Defines the unique identifier of the team to be added to the customer type in the system.
<b>AllowProductLevelAlignment</b>	Boolean	NA	FALSE	Allows users to define if product level alignment is supported in the team. <b>Note:</b> By default, the value is set to 'False.' Once the user changes this value to 'True,' it cannot be reverted to 'False'.
<b>CustomerTypeId</b>	Text	NA	2	Id of the customer type to which the team will be added.

Name	Type	Default	Sample Value	Description
<b>RemoveMapping</b>	Boolean	FALSE	FALSE	Remove the team from the customer type mapping.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.

	<b>Note:</b> To map a Zip with the team, the default <b>CustomerTypeId</b> (which is 0) is used.
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### Level to Role Changes

Name	Type	Default	Sample Value	Description
<b>LevelId</b>	Text	NA	1	Defines the unique identifier of the level to be added to the role mapping in the system.
<b>RoleId</b>	Text	NA	A001	Defines the unique identifier of the role to which the level will be added.
<b>UsesEffort</b>	Boolean	FALSE	FALSE	
<b>RemoveMapping</b>	Boolean	FALSE	FALSE	Remove the level from the role mapping.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.

Name	Type	Default	Sample Value	Description
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.

### Level to Country Changes

Name	Type	Default	Sample Value	Description
<b>LevelId</b>	Text	NA	France	Defines the unique identifier of the level to be added to the role mapping in the system.
<b>CountryId</b>	Text	NA	FR	Defines the unique identifier of the country to which the level will be added.
<b>RemoveLeveltoCountryMapping</b>	Boolean	FALSE	FALSE	Remove the level from the country mapping.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.


## Level to Business Unit Changes

Name	Type	Default	Sample Value	Description
<b>LevelId</b>	Text	NA	Oncology	Defines the unique identifier of the level to be added to the role mapping in the system.
<b>BusinessUnitId</b>	Text	NA	BU_o ncology	Defines the unique identifier of the business unit to which the level will be added.
<b>RemoveLeveltoBusinessUnitMapping</b>	Boolean	FALSE	FALSE	Remove the level from the business unit mapping.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.

## Work Unit Changes

Name	Type	Default	Sample Value	Description
<b>WorkUnitId</b>	Text	NA	9A99999	Defines the unique identifier of the Work Unit to be added in the system.
<b>WorkUnitName</b>	Text	NA	PCP2	Name of the Work Unit to be added in the system.
<b>WorkUnitParentId</b>	Text	NA	Unassigned	Defines the unique identifier of the parent Work Unit to be added in the system.
<b>LevelId</b>	Text	NA	11	Defines the unique identifier of the Work Unit level to be added.


Name	Type	Default	Sample Value	Description
<b>RemoveWorkUnit</b>	Boolean	FALSE	FALSE	Remove the Work Unit from the system.
<b>WorkUnitType</b>	Text	NA	Field / Home Office	Type of Work Unit to be added in the system.
<b>RoleId</b>	Text	NA	5	Defines the unique identifier of the role to be assigned in the Work Unit.
<b>EffectiveStartDate</b>	Date	NA	4-4-2025	Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA	5-4-2025	Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA	4-4-2025	Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA	5-4-2025	System date on which the last change was made to the record.
<b>InternalWorkUnitId</b>	Text	NA	66432	Unique system generated Id.
<b>parentworkunitinternalid</b>	Text	NA		Unique system generated Id.
<b>CountryId</b>	Text	NA	BRZ	Defines the unique identifier of the country to be added in the system.
<b>BusinessUnitId</b>	Text	NA	GP	Defines the unique identifier of the business unit to be added in the system.
<b>LastApprovedDate</b>	Date	NA	5-6-2025	System date on which the change was approved.

 **Note:** Work unit internal ID will be shown as part of the work unit custom field export.

## Work Unit Changes (Applicable only for DR instances)

Name	Type	Default	Sample Value	Description
<b>WorkUnitId</b>	Text	NA	AE001	Defines the unique identifier of the Work Unit to be added in the system.
<b>WorkUnitName</b>	Text	NA	010A1C	Name of the Work Unit to be added in the system.
<b>WorkUnitParentId</b>	Text	NA	10000189	Defines the unique identifier of the parent Work Unit to be added in the system.
<b>LevelId</b>	Text	NA	BP001	Defines the unique identifier of the Work Unit level to be added.
<b>RemoveWorkUnit</b>	Boolean	FALSE	False	Remove the Work Unit from the system.
<b>WorkUnitType</b>	Text	NA	Field	Type of Work Unit to be added in the system.
<b>EffectiveStartDate</b>	Date	NA	FALSE	Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA	FALSE	Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA	5-6-2025	Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA	5-5-2025	System date on which the last change was made to the record.
<b>InternalWorkUnitId</b>	Text	NA	WA001	Unique system generated Id.
<b>parentworkunitinternalid</b>	Text	NA		Unique system generated Id.
<b>CountryId</b>	Text	NA	BRZ	Defines the unique identifier of the country to be added in the system.
<b>BusinessUnitId</b>	Text	NA	GP	Defines the unique identifier of the business unit to be added in the system.

Name	Type	Default	Sample Value	Description
<b>AssignmentContext</b>	Text	NA	Intern	Defines the unique identifier of the Assignment Context to be added in the system.

	<b>Note:</b> Work unit internal ID will be shown as part of the work unit custom field export.
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### Work Unit Relationship Changes

Name	Type	Default	Sample Value	Description
<b>WorkUnitId</b>	Text	NA	ABC-123	Defines the unique identifier of the Work Unit to be added in the system.
<b>ParentWorkUnitId</b>	Text	NA	ABC-123	Defines the unique identifier of the parent Work Unit to be added in the system.
<b>WorkUnitInternalId</b>	Text	NA	ABS-123	Unique system generated Id.
<b>WorkUnitparentInternalId</b>	Text	NA	ABS-321	Unique system generated Id.
<b>TeamId</b>	Text	NA	Team_12	Defines the unique identifier of the team to be added to the customer type in the system.
<b>EffectiveStartDate</b>	Date	NA	03-03-2025	Date from which the record should be active in the system.
<b>EffectiveEndDate</b>	Date	NA	03-10-2025	Date from which the record will be inactive in the system
<b>LastUpdatedDate</b>	Date	NA	03-03-2025	System date on which the last change was made to the record.
<b>RemovedStarting</b>	Date	NA	03-11-2025	Date from which the record will be deleted/removed from the system.

## Position Changes

Name	Type	Sample Value	Description
<b>PositionReferenceID</b>	Text	E123	Defines the unique identifier of the Position ID to be added for position assignment changes. <b>Note:</b> Please note that this would be system generated if not provided by the user.
<b>PositionID</b>	Text	ORG_1CA0301 C_P1	Defines the unique identifier of the Position ID to be added for position assignment changes.
<b>WorkUnitID</b>	Text	ORG_1CA0301 C	Defines the unique identifier of the Work unit to be assigned in the Position.
<b>WorkUnitInternalID</b>	Text	GPS001	
<b>RoleID</b>	Text	GPS001	Defines the unique identifier of the role to be assigned in the Position.
<b>EffectiveStartDate</b>	Date	FALSE	Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date		Date from which the record will be inactive in the system.
<b>LastUpdatedDateFrom</b>	Date		System date on which the last change was made to the record.
<b>LastApprovedDate</b>	Date		System date on which the change was approved.

## Relationship Type Changes

Name	Type	Default	Sample Value	Description
<b>RelationshipTypeID</b>	Text	NA	R1	Defines the unique identifier of the relationship type to be added based on the data contract.
<b>RelationshipType Name</b>	Text	NA	Managed	Name of the relationship type to be added based on the data contract.
<b>RemoveRelationshipType</b>	Boolean	FALSE	FALSE	Remove the relationship type from the system.

Name	Type	Default	Sample Value	Description
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.

### Affiliation Group Configuration Changes

Name	Type	Default	Sample Value	Description
<b>AffiliationGroupID</b>	Text	NA	Config1	Defines the unique identifier for each Affiliation Group Configuration.
<b>AffiliationGroupName</b>	Text	NA	For IDNs	Captures the name of the configuration.
<b>Description</b>	Text	Null/Empty	Applicable for teams with IDN	Captures a short description about the Configuration.
<b>RemoveAffiliationGroup</b>	Boolean	FALSE	FALSE	Removes the Affiliation Group Configuration from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date	NA		System date on which the last change was made to the record.

## Affiliation Network Data Upload Changes

Name	Type	Default	Sample Value	Description
<b>ParentCustomerID</b>	Text	NA	CID1	Parent/ Driving Customer ID.
<b>ChildCustomerID</b>	Text	NA	CID2	Child/ Associated Customer ID.
<b>RelationshipTypeID</b>	Text	NA	R1	Describes the relationship type between the two customers.
<b>RemoveAffiliation Network</b>	Boolean	FALSE	FALSE	Remove the Affiliation Network from the system based on the data contract.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date	NA		System date on which the last change was made to the record.

## Affiliation Group Configuration to Relationship Type

Name	Type	Default	Sample Value	Description
<b>AffiliationGroupID</b>	Text	NA	Config1	Defines the unique identifier for each Affiliation Group Configuration.
<b>RelationshipTypeID</b>	Text	NA	R1	Defines the unique identifier for the Relationship type to be used for Affiliation Group Configuration mapping.
<b>RemoveMapping</b>	Boolean	FALSE	FALSE	Removes the Affiliation Group Configuration from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.

Name	Type	Default	Sample Value	Description
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date	NA		System date on which the last change was made to the record.

### Affiliation Group Configuration to Team Mapping Changes

Name	Type	Default	Sample Value	Description
<b>AffiliationGroupId</b>	Text	NA	Config1	Defines the unique identifier for each Affiliation Group Configuration.
<b>TeamId</b>	Text	NA	R1	Defines the unique identifier for the team to be used for Affiliation Group Configuration mapping.
<b>RemoveMapping</b>	Boolean	FALSE	FALSE	Removes the Affiliation Group Configuration from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date	NA		System date on which the last change was made to the record.

## Affiliation Group Data Upload Changes

Name	Type	Default	Sample Value	Description
<b>AffiliationGroupID</b>	Text	NA	Config1	Defines the unique identifier for each Affiliation Group data.
<b>ParentCustomerID</b>	Text	NA	CID1	Parent/ Driving Customer ID.
<b>ChildCustomerID</b>	Text	NA	CID2	Child/ Associated Customer ID.
<b>RelationshipType</b>	Text	NA	R1	Relationship between ParentCustomerID and ChildCustomerID.
<b>RemoveAffiliation Group</b>	Boolean	FALSE	FALSE	Remove the Affiliation Group data from the system.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date	NA		System date on which the last change was made to the record.

## Local Team Changes

Name	Type	Default	Sample Value	Description
<b>LocalTeamId</b>	Text	NA	TT1	Defines the unique identifier of the local team to be added in the system.
<b>LocalTeamName</b>	Text	NA	California Market	Name of the local team to be added in the system.
<b>RoleId</b>	Text	NA	Text1	Defines the unique identifier of the role to be assigned to the local team.
<b>RemoveLocalTeam</b>	Boolean	FALSE	FALSE	Removes the local team from the system.

Name	Type	Default	Sample Value	Description
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>		NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDateFrom</b>	Date	NA		System date on which the last change was made to the record.

### Local Team Workunit Changes

Name	Type	Default	Sample Value	Description
<b>LocalTeamId</b>	Text	NA	TT1	Defines the unique identifier of the local team to be added for Work Unit mapping in the system.
<b>WorkUnitId</b>	Text	NA	9A99999	Defines the unique identifier of the Work Unit which will be mapped by the local team.
<b>TeamId</b>	Text	NA	R1	Defines the unique identifier of the team.
<b>RemoveMapping</b>	Boolean	FALSE	FALSE	Removes the local team from the WorkUnit mapping.
<b>EffectiveStartDate</b>	Date	NA		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date	NA		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date	NA		Date from which the record will be inactive in the system.
<b>LastUpdatedDate From</b>	Date	NA		System date on which the last change was made to the record.

## Call Plan Changes

Name	Type	Sample Value	Description
CustomerId	Text	CID1	Customer's external unique identifier.
WorkUnitId	Text	GEO1	Work Unit's external unique identifier.
NoOfCallsPlanned	Number	20	Defines the number of call plan alignments.
TeamId	Text	TT_123	Defines the unique identifier of the team.
EffectiveStartDate	Date		Date from which the record should be active in the system.
RemovedStarting	Date		Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date		Date from which the record will be inactive in the system.
LastUpdatedDate	Date		System date on which the last change was made to the record.

## Call Plan with Product Changes

Name	Type	Sample Value	Description
CustomerId	Text	CID1	Customer's external unique identifier.
WorkUnitId	Text	GEO1	Work Unit's external unique identifier.
NoOfCallsPlanned	Number	20	Defines the number of call plan alignments.
TeamId	Text	TT_123	Defines the unique identifier of the team.
ProductId	Text	PP00G3	Defines the unique identifier of the product.
EffectiveStartDate	Date	2025-01-19	Date from which the record should be active in the system.
RemovedStarting	Date	2025-01-19	Date from which the record will be deleted/removed from the system.

Name	Type	Sample Value	Description
EffectiveEndDate	Date	2025-01-19	Date from which the record will be inactive in the system.
LastUpdatedDate	Date	2025-01-19	System date on which the last change was made to the record.

**Call Activity Changes**

Name	Type	Sample Value	Description
<b>CustomerId</b>	Text	CID1	Customer's external unique identifier.
<b>WorkUnitId</b>	Text	GEO1	Work Unit's external unique identifier.
<b>CallDate</b>	DateTime	2038-01-19 03:14:07	Date and time of the planned call. The format should be in <b>YYYY-MM-DD</b> and <b>HH:MM:SS</b> .
<b>TeamId</b>	Text	TT_123	Defines the unique identifier of the team.
<b>EffectiveStartDate</b>	Date		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date		System date on which the last change was made to the record.

## Call Activity with Product Changes

Name	Type	Required	Sample Value	Description
<b>CustomerId</b>	Text	Yes	CID1	Customer's external unique identifier.
<b>WorkUnitId</b>	Text	Yes	GEO1	Work Unit's external unique identifier.
<b>CallDate</b>	Date Time	Yes	2038-01-19 03:14:07	Date and time of the planned call. The format should be in <b>YYYY-MM-DD</b> and <b>HH:MM:SS</b> .
<b>TeamId</b>	Text	Yes	TT_123	Defines the unique identifier of the team.
<b>ProductId</b>	Text	Yes	P000G3	Defines the unique identifier of the product.
<b>EffectiveStartDate</b>	Date		2025-01-19	Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date		2025-01-19	Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date		2025-01-19	Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Boolean		2025-01-19	System date on which the last change was made to the record.

## Blacklist Customer Changes

Name	Type	Sample Value	Description
<b>BlacklistCustomerId</b>	Text	CID1	Customer's external unique identifier.
<b>EffectiveStartDate</b>	Date		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date		System date on which the last change was made to the record.
<b>Remove</b>	Boolean	False	Defines a flag to make the customer blacklist or not.

## Blacklist Alignment Changes

Name	Type	Sample Value	Description
<b>BlacklistCustomerId</b>	Text	CID1	Defines the customer's external ID.
<b>WorkUnitId</b>	Text	GEO1	Defines the unique identifier of the Work Unit where the blacklisted customer belongs.
<b>TeamId</b>	Text	Team1	Defines the unique identifier of the team.
<b>EffectiveStartDate</b>	Date		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date		System date on which the last change was made to the record.
<b>Remove</b>	Boolean	False	Defines a flag to make the customer blacklist or not.

## Explicit Alignment from External Source Changes

Name	Type	Sample Value	Description
<b>ExtCustomerId</b>	Text	CID1	Customer's external unique identifier.
<b>WorkUnitId</b>	Text	GEO1	Work Unit's external unique identifier.
<b>TeamId</b>	Text	TT_123	Defines the unique identifier of the team.
<b>EffectiveStartDate</b>	Date		Date from which the record should be active in the system.
<b>RemovedStarting</b>	Date		Date from which the record will be deleted/removed from the system.
<b>EffectiveEndDate</b>	Date		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date		System date on which the last change was made to the record.
<b>RemoveExplicitAlignment</b>	Boolean	TRUE/ False	Removes the explicit alignment.

## Cycle Plan



**Note:** On submitting the export request, all the objects pertaining to Export API are exported, except the Cycle Plan object. Therefore, to export this object, you need to explicitly specify the TeamId parameter shown in the following table.

Name	Type	Sample Value	Description
<b>TeamId</b>	Text	TEAM1	Defines the unique identifier of the team to be added for cycle mapping.
<b>Frequency</b>	Text	Quarterly/ Monthly/Y early	Defines the frequency of the cycles e.g., Monthly, Quarterly, Yearly.
<b>FrequencyFromDate</b>	Date	10/12/2021	Defines the start date of the frequency of the cycles.
<b>FrequencyEndDate</b>	Date	12/31/2021	Defines the end date of the frequency of the cycles.
<b>Number of Cycles</b>	Integer	1	Defines the number of cycles.
<b>CycleName</b>	Text	CYCLE12	Defines the name of the cycle.
<b>CycleStartDate</b>	Date	5/21/2021	Defines the start date of the cycle.
<b>CycleEndDate</b>	Date	7/21/2021	Defines the end date of the cycle.

## Customer Team Changes

Name	Type	Sample Value	Description
<b>CustomerID</b>	Text	C123	Customer's external unique identifier.
<b>TeamID</b>	Text	Onc123	Defines the unique identifier of the team.
<b>CustomfieldId</b>	Text		
<b>Values</b>	Text		
<b>EffectiveStartDate</b>	Date		Effective start date of the record(s) from which the data can be exported.
<b>EffectiveEnddate</b>	Date		Effective end date of the record(s) from which the data can be exported.
<b>LastUpdatedDate</b>	Date		System date on which the last change was made to the record.

## Scenario Changes

The input parameter for this API is Effective date. The following output is generated.

Name	Type	Sample Value	Description
<b>TeamID</b>	Text		Defines the unique identifier of the team.
<b>ScenarioName</b>	Text		Name of the scenario.
<b>ScenarioCreationDate</b>	Date		Date on which the scenario was created.
<b>ScenarioEffectiveDate</b>	Date		Effective date of the scenario.
<b>EffectiveStartDate</b>	Date		Date from which the scenario should be active in the system
<b>EffectiveEndDate</b>	Date		Date from which the scenario will be inactive in the system

## Country Changes

Name	Type	Sample Value	Description
<b>CountryId</b>	Text	France	Defined the unique identifier of the Country
<b>CountryName</b>	Text	France	Name of the Country.
<b>RemoveCountry</b>	Boolean	False	
<b>EffectiveStartDate</b>	Date		Date from which the record should be active in the system.
<b>EffectiveEndDate</b>	Date		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date		System date on which the last change was made to the record.
<b>RemovedStarting</b>	Date		Date from which the record will be deleted/removed from the system.

## Business Unit Changes

Name	Type	Sample Value	Description
<b>BusinessUnitId</b>	Text	Oncology	Unique Identifier of Business Unit.
<b>BusinessUnitName</b>	Text	BU_Oncology	Name of Business Unit.
<b>RemoveBusinessUnit</b>	Boolean	False	Flag to remove BusinessUnit.
<b>EffectiveStartDate</b>	Date		Date from which the record should be active in the system.
<b>EffectiveEndDate</b>	Date		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date		System date on which the last change was made to the record.
<b>RemovedStarting</b>	Date		Date from which the record will be deleted/removed from the system.

## Leave Changes

Name	Type	Sample Value	Description
<b>EmployeeID</b>	Text	E123	Defines the unique identifier of the Employee being created.
<b>LeaveStartDate</b>	Text		Start date of the leave recorded in the system.
<b>LeaveEndDate</b>	Text		End date of the leave recorded in the system.
<b>LeaveType</b>	Text		Type of leave applied (sick, paid, unpaid and vacation)
<b>EffectiveStartDate</b>	Date		Date from which the record should be active in the system.
<b>EffectiveEndDate</b>	Date		Date from which the record will be inactive in the system.
<b>LastUpdatedDate</b>	Date		System date on which the last change was made to the record.
<b>RemovedStarting</b>	Date		Date from which the record will be deleted/removed from the system.

## Customer Product Metrics

Name	Type	Sample Value	Description
<b>CustomerID</b>	Text	A000G3	Unique Identifier for Customer
<b>ProductID</b>	Text	P1003V	Unique Identifier for Product
<b>CustomFiledID</b>	Text	Segmentation	
<b>Values</b>	Text	Tier1	
<b>EffectiveStartDate</b>	Date	1 Jan 2020	Effective start date of the record(s) from which the data can be exported.
<b>EffectiveEndDate</b>	Date	31 Jan 9999	Effective end date of the record(s) from which the data can be exported.
<b>LastUpdatedDate</b>	Date	1 Jan 2020	System date on which the last change was made to the record.

## Customer Address Custom Field

Name	Type	Sample Value	Description
<b>CustomerAddressId</b>	Text	CS001	Unique Customer Address Id
<b>CustomerId</b>	Text	CS001_1A	Defines the unique identifier of the customer being created.
<b>CustomFiled1</b>	Text	KaiserFlag	Custom Field names
<b>effectivestartdate</b>	Date	05/01/2025	Date from which the scenario should be active in the system.
<b>effectiveenddate</b>	Date	31/12/9999	Date from which the scenario will be inactive in the system.
<b>lastupdateddate</b>	Date	02/03/2025	System date on which the last change was made to the record.

## Custom Field Changes (Exports)

This section shows the object details for all the Export contracts for custom field management via Bulk.

### Custom Field Details

Name	Type	Sample Value	Description
<b>CustomFieldId</b>	Text	CS01	Primary identifier for Custom Field created.
<b>CustomFieldDisplayName</b>	Text	Eligible for Sample	Display name of Custom field.
<b>DataType</b>	Text	Boolean	Type of Custom field. (Text, Numeric, Date & Boolean).
<b>ObjectName</b>	Text	Customer	Name of the object for which custom field is created.
<b>Description</b>	Text		Details of custom field created.
<b>AllowSharingSplitting</b>	Boolean	True	Applicable for Only Numeric Field.
<b>SpecialCharacterAtBeginning</b>	Boolean	True	Applicable for Numeric and Text custom field.
<b>NumberDecimalRoundto</b>	Number	2	Values will be *0:* No decimal value. Value rounded off to int. Eg: 129.98 rounded to 130 1-5: round of to 1-5 decimal. Eg: 129.9876 with value as 2 will be converted to 129.99
<b>NumberShowCommaSafter every</b>	Number	2	Allowed values between 1-5
<b>CommaatBeginning</b>	Boolean	False	Flag to Show commas-based numbers provided in <b>NumberShowCommaAfterEvery</b> field.
<b>AllowUiEditability</b>	Boolean	False	This field is applicable for Employee and employee assignment objects.
<b>ismandatoryfield</b>	Boolean	False	This field is applicable for Employee object only.

Name	Type	Sample Value	Description
islovfield	Boolean	False	This field is applicable for Employee objects with Datatype as text only.
EmailFormatCheck	Boolean	False	This field is applicable for Employee object with Datatype as text only.
Endswith	Text	@zs.com	This field is applicable for Employee object and Datatype as text.
LimitToScenario	Boolean	False	Restrict Scenario in scenario mode.
RemoveCustomfield	Boolean	False	Flag to remove Custom Field.
EffectiveStartDate	Date	05/01/2025	Date from which the scenario should be active in the system
EffectiveEndDate	Date	31/12/9999	Date from which the scenario will be inactive in the system
LastUpdatedDate	Date	5/5/2025	System date on which the last change was made to the record.
RemovedStarting	Date	31/12/2025	Date from which the record will be deleted/removed from the system.

**Custom Field Visibility (Team Role)**

Name	Type	Sample Value	Description
CustomFieldId	Text	CS01	Identifier of the custom field whose visibility is to be updated.
TeamId	Text	GP	Identifier of the team for which the visibility is to be updated.
RoleId	Text	DM	Identifier of the role for which the visibility is to be updated.
EffectiveStartDate	Date	05/01/2025	Date on which the visibility scenario becomes active in the system.
EffectiveEndDate	Date	31/12/9999	Date on which the visibility scenario becomes inactive in the system.
LastUpdatedDate	Date	5/5/2025	System date when the last update was made to the record.

## Custom Field Visibility (Customer Type)

Name	Type	Sample Value	Description
<b>CustomFieldId</b>	Text	CS01	Custom Field id for which customer type visibility is to be provided.
<b>CustomerTypeId</b>	Text	IDN	Customer type for which visibility is to be provided.
<b>RemoveCustomFieldCustomerType</b>	Boolean		Flag To remove custom field to Customer type mapping.
<b>EffectiveStartDate</b>	Date	05/01/2025	Date from which the scenario should be active in the system.
<b>EffectiveEndDate</b>	Date	31/12/9999	Date from which the scenario will be inactive in the system.
<b>LastUpdatedDate</b>	Date	5/5/2025	System date on which the last change was made to the record.

## Export Objects Supported in Scenario Mode

Object	Export Available
<b>Customer Alignment Changes</b>	Yes
<b>Geo Alignment Changes</b>	Yes
<b>Employee Assignment Changes</b>	Yes
<b>Work Unit Changes</b>	Yes
<b>Position</b>	Yes

## Context Aware Objects Support

Export Objects
Customer Alignment Changes
Product Level Alignment Changes
Alignment Full Feed Changes
Blacklist Customer Alignment Changes

# HTTP Status Codes

HTTP defines the standard status codes that can be used to convey the results of a client's request. The status codes are divided into three categories.

## 2xx Status Codes (Success)

Error Code	Definition	Should Retry	Comments
<b>2xx</b>	Indicates that the client's request was accepted successfully	No	This error family mainly includes success error codes.

## 4xx Status Codes (Client Error)

Error Code	Definition	Should Retry	Comments
<b>400</b>	Bad Request (The request could not be understood by the server due to incorrect syntax. The client SHOULD NOT repeat the request without modifications)	NO	This error family mainly includes success error codes.
<b>401</b>	Unauthorized (Indicates that the request requires user authentication information. The client MAY repeat the request with a suitable Authorization header field)	NO	
<b>403</b>	User is not authorized (Unauthorized request. The client does not have access rights to the content. Unlike 401, the client's identity is known to the server.)	NO	
<b>404</b>	Resource Not Found (The server cannot	NO	If occurs, need a fix at Z Aidyn/Utility level.

Error Code	Definition	Should Retry	Comments
	find the requested resource.)		
<b>405</b>	Method Not Allowed (The request HTTP method is known by the server but has been disabled and cannot be used for that resource.)	NO	If occurs, need a fix at ZAIDYN/Utility level.
<b>422</b>	Application Validation Errors (The server understands the content type and syntax of the request entity, but still server is unable to process the request for some reason).	NO	Usually these are validation errors and may need some action from user/utility side.

### 5xx Status Codes (Server Error)

Error Code	Definition	Should Retry	Comments
<b>500</b>	Database transaction issue (The server encountered an unexpected condition that prevented it from fulfilling the request)	YES	
<b>503</b>	Socket exception (The server is not ready to handle the request)	YES	
<b>504</b>	Request timed out (The server is acting as a gateway and cannot get a response in time for a request)	YES	
<b>522</b>	Something went wrong in backend RDS Restart Job not found	YES	



# Smart Alert

## API for Setting Configuration of Smart Alerts

Using this API, you can set the configuration for existing/potential vacancy alert. It will be a one-time activity by the admin user.

## Potential Vacancy

### Endpoint:

#### URL

```
https://fieldperformance.zaidyn.zsservices.com/{instance}/vacancies/
```

### Type: PUT

### Request Body:

#### JSON

```
{  
  
  "PotentialVacancy": {  
  
    "noOfDays": [5,5], //notification will be triggered if assignment is ending 5th day from  
    thecurrent date  
  
    "receiverPersona": 2, //details mentioned below  
  
    "priority": "Low", //alert will come under low priority section of notifications panel | for  
    AR1even if High is mentioned, alert will still come under Low Priority  
  
    "isEnabled": "True" //if set to false, then alert won't be triggered for vacancies  
  
  }  
}
```

## Header:

### JSON

Content-Type:application/json Host:spm.qa.zsservices.com

Authorization: Use Username and Password to generate Authorization key

EffectiveDate: 2021-01-01 (Date from which you want Alert to be active)

## Existing Vacancy

## Endpoint:

### URL

https://fieldperformance.zaidyn.zsservices.com/{instance}/vacancies/

## Type: PUT

## Request Body:

### JSON

```
{  
  
  "ExistingVacancy": {  
  
    "noOfDays": 5, //notification will be triggered if a workunit is vacant since the past 5  
    days "receiverPersona": 2,  
  
    "priority": "Low", //alert will come under low priority section of notifications panel | for  
    AR1even if High is mentioned, alert will still come under Low Priority  
  
    "isEnabled" : "True" //if set to false, then alert wont be triggered for vacancies  
  
  }  
}
```

## Header:

### JSON

Content-Type:application/json Host:spm.qa.zsservices.com

Authorization:Basic Use User name and Password to generate Authorization key

EffectiveDate: 2021-01-01 (Date from which you want Alert to be active)

## Persona Details

Receiver Persona value	Description
1	Share with immediate manager
2	Share with everyone up in the hierarchy
4	Share with everyone up in hierarchy with role as admin
8	Share with employee assigned two level up in the hierarchy
16	Share with local leader



**Note:** A sum of the corresponding values should be passed in the request body if multiple receiver personas need to be set.

**Example:** If a user wants to set the receiver persona for immediate manager (1) and the employee is assigned two level up in the hierarchy (8), he needs to pass "9" in the request body against the receiver persona.

## API for Triggering Notifications for Vacancy Alerts

This API is a part of the scheduler and runs only once a day at 12AM UTC.

### Endpoint:

#### URL

```
https://fieldperformance.zaidyn.zsservices.com/{instance}/schedules/vacancyAlert
```

### Type: POST

### Request Body:

//no body

### Header:

```
EffectiveDate:2021-05-27 Host:spm.qa.zsservices.com
```

```
Authorization: Use Username and Password to generate Authorization key
```

# Migration API for Existing Employees

This API allows users to ingest hire dates for existing employees in the system.



## Note:

- This API is applicable only for existing ZAIDYN clients. Existing clients must complete this step so that the system can function in the FD-R4(ZAIDYN R12) release.
- The clients will have to evaluate at their end and upload hire dates for the existing employees in the system.
- This API only supports single Employee Tenure.
- hireDate and terminationDate are base fields, so all existing fields with names (hireDate, terminationDate) should be archived on the same day after export.

**POST:** <https://fieldperformance.zaidyn.zsservices.com/{instance}-7001a/personnels/migrate-employees>

## Header Required:

### JSON

```
Headers: {  
  userId: '', Authorization: '', effectiveDate: '  
}
```

## Request Body:

### JSON

```
[  
  {  
    "employeeId": "DEMO_ADMIN", "hireDate" : "2020-01-01"  
  },  
]
```

```
{  
  "employeeId": "Emma.Lineman", "hireDate" : "2025-01-01"  
}  
]
```

The following fields are auto-populated once this API is run:

- Termination Date - set to **max(EmployeeEndDate)**
- Events for HIRE and TERMINATION

Also, the **hireDateingested** is validated against the **min(AssignmentStartDate)** present for the Employee.

# Parallel Processing Matrix

Users can upload and execute non-dependent objects parallelly and dependent objects sequentially. The table below shows the list of parallel and sequential processing objects for each Import object.

Object	Parallel Processing Objects		Sequential Processing Objects
<b>AffiliationCfgToRelationship Type</b>	<ul style="list-style-type: none"> <li>• BlacklistAlignment</li> <li>• BlacklistCustomer</li> <li>• CallActivity</li> <li>• CallPlan</li> <li>• Customer</li> <li>• Customer Address</li> <li>• CustomerAlignment</li> <li>• CustomerTeam</li> <li>• CustomerType</li> <li>• Employee</li> <li>• EmployeeAddress</li> <li>• EmployeeAssignment</li> <li>• ExplicitAlignments</li> <li>• GeoType</li> <li>• Level</li> </ul>	<ul style="list-style-type: none"> <li>• Level To Role</li> <li>• LocalTeam</li> <li>• LocalTeamToWorkUnit</li> <li>• Product</li> <li>• ProductAssignment</li> <li>• RelationshipType</li> <li>• Role</li> <li>• RoleCategory</li> <li>• RoleToProduct</li> <li>• Team</li> <li>• Team- Customer (Type)</li> <li>• WorkUnit</li> <li>• Zip</li> <li>• Zip Alignment</li> </ul>	<ul style="list-style-type: none"> <li>• AffiliationCfgToRelationshipType</li> <li>• AffiliationCfgToTeamMapping</li> <li>• AffiliationHierarchy</li> <li>• AffiliationHierarchy Data</li> <li>• AffiliationNetwork</li> <li>• RelationshipType</li> </ul>
<b>AffiliationCfgToTeamMapping</b>	<ul style="list-style-type: none"> <li>• AffiliationCfgToTeamMapping</li> <li>• AffiliationHierarchy</li> <li>• AffiliationHierarchy Data</li> <li>• AffiliationNetwork</li> <li>• BlacklistAlignment</li> <li>• BlacklistCustomer</li> <li>• CallActivity</li> </ul>	<ul style="list-style-type: none"> <li>• EmployeeAssignment</li> <li>• ExplicitAlignments</li> <li>• GeoType</li> <li>• Level</li> <li>• Level To Role</li> <li>• LocalTeam</li> <li>• LocalTeamToWorkUnit</li> </ul>	<ul style="list-style-type: none"> <li>• AffiliationHierarchy</li> <li>• AffiliationHierarchy Data</li> <li>• CallActivity</li> <li>• CallPlan</li> <li>• Customer</li> <li>• Customer Address</li> <li>• Customer Alignment</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• CallPlan</li> <li>• Customer</li> <li>• Customer Address</li> <li>• Customer Alignment</li> <li>• CustomerTeam</li> <li>• CustomerType</li> <li>• Employee</li> </ul>	<ul style="list-style-type: none"> <li>• Product</li> <li>• ProductAssignme nt</li> <li>• RelationshipType</li> <li>• Role</li> <li>• RoleCategory</li> <li>• RoleToProduct</li> </ul>	<ul style="list-style-type: none"> <li>• CustomerTeam</li> <li>• ExplicitAlignments</li> <li>• Level</li> <li>• Team</li> <li>• Team-Customer (Type)</li> <li>• WorkUnit</li> <li>• Zip</li> <li>• Zip Alignment</li> </ul>
<b>AffiliationNetw ork</b>	<ul style="list-style-type: none"> <li>• LocalTeamToWork U nit</li> <li>• Team-Customer (Type)</li> <li>• Role</li> <li>• BlacklistCustomer</li> <li>• BlacklistAlignment</li> <li>• CallActivity</li> <li>• ProductAssignme nt</li> <li>• CallPlan</li> <li>• RoleToProduct</li> <li>• Customer Address</li> <li>• Zip</li> <li>• Customer Alignment</li> <li>• LocalTeam</li> <li>• CustomerType</li> </ul>	<ul style="list-style-type: none"> <li>• Product</li> <li>• Employee</li> <li>• RelationshipType</li> <li>• EmployeeAddress</li> <li>• RoleCategory</li> <li>• EmployeeAssig nment</li> <li>• Team</li> <li>• ExplicitAlignments</li> <li>• WorkUnit</li> <li>• GeoType</li> <li>• Zip Alignment</li> <li>• Level</li> <li>• Level To Role</li> </ul>	<ul style="list-style-type: none"> <li>• CustomerTeam</li> <li>• AffiliationNetwork</li> <li>• AffiliationHierarchy Data</li> <li>• AffiliationCfgToRel ations hipType</li> <li>• Customer</li> <li>• AffiliationCfgToTe amMa pping</li> <li>• AffiliationHierarchy</li> </ul>
<b>AffiliationHiera rchyData</b>	<ul style="list-style-type: none"> <li>• Zip</li> <li>• ProductAssignment</li> <li>• Level To Role</li> </ul>	<ul style="list-style-type: none"> <li>• Customer</li> <li>• LocalTeam</li> <li>• Customer Address</li> </ul>	<ul style="list-style-type: none"> <li>• AffiliationNetwork</li> <li>• AffiliationHierarchy Data</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• AffiliationCfgToRelationshipType</li> <li>• RoleToProduct</li> <li>• AffiliationCfgToTeamMapping</li> <li>• GeoType</li> <li>• AffiliationHierarchy</li> <li>• LocalTeamToWorkUnit</li> <li>• BlacklistAlignment</li> <li>• Role</li> <li>• BlacklistCustomer</li> <li>• Team-Customer (Type)</li> <li>• CallActivity</li> <li>• CallPlan</li> <li>• Level</li> </ul>	<ul style="list-style-type: none"> <li>• Product</li> <li>• Customer Alignment</li> <li>• RelationshipType</li> <li>• CustomerTeam</li> <li>• RoleCategory</li> <li>• CustomerType</li> <li>• Team</li> <li>• Employee</li> <li>• WorkUnit</li> <li>• EmployeeAddress</li> <li>• Zip Alignment</li> <li>• EmployeeAssignment</li> <li>• ExplicitAlignments</li> </ul>	
<b>AffiliationNetwork</b>	<ul style="list-style-type: none"> <li>• Level To Role</li> <li>• Team</li> <li>• ProductAssignment</li> <li>• AffiliationHierarchy</li> <li>• Zip Alignment</li> <li>• BlacklistAlignment</li> <li>• LocalTeamToWorkUnit</li> <li>• BlacklistCustomer</li> <li>• RoleCategory</li> <li>• CallActivity</li> <li>• WorkUnit</li> <li>• CallPlan</li> </ul>	<ul style="list-style-type: none"> <li>• LocalTeam</li> <li>• Customer Alignment</li> <li>• Product</li> <li>• CustomerType</li> <li>• Role</li> <li>• Employee</li> <li>• RoleToProduct</li> <li>• EmployeeAddress</li> <li>• Team- Customer (Type)</li> <li>• EmployeeAssignment</li> <li>• Zip</li> </ul>	<ul style="list-style-type: none"> <li>• CustomerTeam</li> <li>• Customer</li> <li>• AffiliationCfgToRelationshipType</li> <li>• RelationshipType</li> <li>• AffiliationHierarchy Data</li> <li>• AffiliationNetwork</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• Level</li> <li>• Customer Address</li> </ul>	<ul style="list-style-type: none"> <li>• ExplicitAlignmen ts</li> <li>• AffiliationCfgTo TeamMapping</li> <li>• GeoType</li> </ul>	
<b>BlacklistAlign ment</b>	<ul style="list-style-type: none"> <li>• WorkUnit</li> <li>• Product</li> <li>• Level</li> <li>• AffiliationCfgToR elationshipType</li> <li>• RoleCategory</li> <li>• AffiliationCfgToTe amMapping</li> <li>• ExplicitAlignments</li> <li>• AffiliationHierarchy</li> <li>• LocalTeam</li> <li>• AffiliationHierarchy D ata</li> <li>• RelationshipType</li> <li>• AffiliationNetwork</li> <li>• Team</li> <li>• BlacklistCustomer</li> <li>• Zip Alignment</li> <li>• CallActivity</li> <li>• GeoType</li> </ul>	<ul style="list-style-type: none"> <li>• CallPlan</li> <li>• Level To Role</li> <li>• Customer</li> <li>• LocalTeamToW orkUnit</li> <li>• Customer</li> <li>• Address</li> <li>• ProductAssignme nt</li> <li>• Customer Alignment</li> <li>• Role</li> <li>• CustomerTeam</li> <li>• RoleToProduct</li> <li>• CustomerType</li> <li>• Team- Customer (Type)</li> <li>• Employee</li> <li>• Zip</li> <li>• EmployeeAddress</li> <li>• EmployeeAssign men</li> </ul>	BlacklistAlignment
<b>BlacklistCusto mer</b>	<ul style="list-style-type: none"> <li>• WorkUnit</li> <li>• Product</li> <li>• Level</li> <li>• AffiliationCfgToR elationshipType</li> <li>• RoleCategory</li> </ul>	<ul style="list-style-type: none"> <li>• CallPlan</li> <li>• Level To Role</li> <li>• Customer</li> <li>• LocalTeamToW orkUnit</li> <li>• Customer</li> </ul>	BlacklistCustomer

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• AffiliationCfgToTeamMapping</li> <li>• ExplicitAlignments</li> <li>• AffiliationHierarchy</li> <li>• LocalTeam</li> <li>• AffiliationHierarchy Data</li> <li>• RelationshipType</li> <li>• AffiliationNetwork</li> <li>• Team</li> <li>• BlacklistAlignments</li> <li>• Zip Alignment</li> <li>• CallActivity</li> <li>• GeoType</li> </ul>	<ul style="list-style-type: none"> <li>• Address</li> <li>• ProductAssignment</li> <li>• Customer</li> <li>• Alignment</li> <li>• Role</li> <li>• CustomerTeam</li> <li>• RoleToProduct</li> <li>• CustomerType</li> <li>• Team- Customer (Type)</li> <li>• Employee</li> <li>• Zip</li> <li>• EmployeeAddress</li> <li>• EmployeeAssignment</li> </ul>	
<b>CallActivity</b>	<ul style="list-style-type: none"> <li>• WorkUnit</li> <li>• Product</li> <li>• Level</li> <li>• AffiliationCfgToRelationshipType</li> <li>• RoleCategory</li> <li>• AffiliationCfgToTeamMapping</li> <li>• ExplicitAlignments</li> <li>• AffiliationHierarchy</li> <li>• LocalTeam</li> <li>• AffiliationHierarchy Data</li> <li>• RelationshipType</li> <li>• AffiliationNetwork</li> </ul>	<ul style="list-style-type: none"> <li>• Level To Role</li> <li>• Customer</li> <li>• LocalTeamToWorkUnit</li> <li>• Customer</li> <li>• Address</li> <li>• ProductAssignment</li> <li>• Customer</li> <li>• Alignment</li> <li>• Role</li> <li>• CustomerTeam</li> <li>• RoleToProduct</li> <li>• CustomerType</li> <li>• Team- Customer (Type)</li> </ul>	CallActivity

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• Team</li> <li>• BlacklistAlignmen</li> <li>• Zip Alignment</li> <li>• GeoType</li> <li>• CallPlan</li> </ul>	<ul style="list-style-type: none"> <li>• Employee</li> <li>• Zip</li> <li>• EmployeeAddress</li> <li>• EmployeeAssig nment</li> <li>• BlacklistCustomer</li> </ul>	
<b>CallPlan</b>	<ul style="list-style-type: none"> <li>• WorkUnit</li> <li>• Product</li> <li>• Level</li> <li>• AffiliationCfgToR elationshipType</li> <li>• RoleCategory</li> <li>• AffiliationCfgToTe</li> <li>• amMapping</li> <li>• ExplicitAlignments</li> <li>• AffiliationHierarchy</li> <li>• LocalTeam</li> <li>• AffiliationHierarchy D ata</li> <li>• RelationshipType</li> <li>• AffiliationNetwork</li> <li>• Team</li> <li>• BlacklistAlignmen</li> <li>• Zip Alignment</li> <li>• GeoType</li> <li>• CallActivity</li> </ul>	<ul style="list-style-type: none"> <li>• Level To Role</li> <li>• Customer</li> <li>• LocalTeamToWorkU nit</li> <li>• Customer</li> <li>• Address</li> <li>• ProductAssignment</li> <li>• Customer</li> <li>• Alignment</li> <li>• Role</li> <li>• CustomerTeam</li> <li>• RoleToProduct</li> <li>• CustomerType</li> <li>• Team- Customer (Type)</li> <li>• Employee</li> <li>• Zip</li> <li>• EmployeeAddress</li> <li>• EmployeeAssignme nt</li> <li>• BlacklistCustomer</li> </ul>	CallPlan
<b>Customer</b>	<ul style="list-style-type: none"> <li>• LocalTeamToWork Unit</li> <li>• Role</li> </ul>	<ul style="list-style-type: none"> <li>• EmployeeAssi gnment</li> <li>• RelationshipType</li> </ul>	<ul style="list-style-type: none"> <li>• Level</li> <li>• Customer Alignment</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• ProductAssignment</li> <li>• Employee</li> <li>• RoleToProduct</li> <li>• EmployeeAddress</li> <li>• Product</li> </ul>	<ul style="list-style-type: none"> <li>• GeoType</li> <li>• RoleCategory</li> <li>• LevelToRole</li> <li>• AffiliationCfgToTeamMapping</li> <li>• LocalTeam</li> </ul>	<ul style="list-style-type: none"> <li>• Zip</li> <li>• AffiliationCfgToRelationshipType</li> <li>• CustomerType</li> <li>• AffiliationHierarchy</li> <li>• Team-Customer (Type)</li> <li>• AffiliationHierarchy Data</li> <li>• AffiliationNetwork</li> <li>• CustomerTeam</li> <li>• BlacklistAlignment</li> <li>• ExplicitAlignments</li> <li>• BlacklistCustomer</li> <li>• Team</li> <li>• CallActivity</li> <li>• WorkUnit</li> <li>• CallPlan</li> <li>• Zip Alignment</li> <li>• Customer</li> <li>• Customer Address</li> </ul>
<b>CustomerAddress</b>	<ul style="list-style-type: none"> <li>• GeoType</li> <li>• RoleCategory</li> <li>• Product</li> <li>• AffiliationCfgToRelationshipType</li> <li>• EmployeeAssignment</li> <li>• AffiliationCfgToTeamMapping</li> </ul>	<ul style="list-style-type: none"> <li>• BlacklistAlignment</li> <li>• Level To Role</li> <li>• BlacklistCustomer</li> <li>• LocalTeamToWorkUnit</li> <li>• CallActivity</li> <li>• ProductAssignment</li> <li>• CallPlan</li> <li>• Role</li> </ul>	<ul style="list-style-type: none"> <li>• WorkUnit</li> <li>• Team</li> <li>• Zip Alignment</li> <li>• Customer Address</li> <li>• Team-Customer (Type)</li> <li>• Customer Alignment</li> <li>• Zip</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• LocalTeam</li> <li>• AffiliationHierarchy</li> <li>• RelationshipType</li> <li>• AffiliationHierarchy Data</li> <li>• AffiliationNetwork</li> <li>• ExplicitAlignments</li> </ul>	<ul style="list-style-type: none"> <li>• CustomerType</li> <li>• RoleToProduct</li> <li>• Employee</li> <li>• EmployeeAddress</li> </ul>	<ul style="list-style-type: none"> <li>• CustomerTeam</li> <li>• Customer</li> <li>• Level</li> </ul>
<b>CustomerAlignment</b>	<ul style="list-style-type: none"> <li>• LocalTeamToWork Unit</li> <li>• ExplicitAlignments</li> <li>• Role</li> <li>• AffiliationHierarchy</li> <li>• Level To Role</li> <li>• AffiliationNetwork</li> <li>• ProductAssignment</li> <li>• BlacklistAlignment</li> <li>• RoleToProduct</li> <li>• BlacklistCustomer</li> <li>• GeoType</li> </ul>	<ul style="list-style-type: none"> <li>• CallActivity</li> <li>• LocalTeam</li> <li>• CallPlan</li> <li>• Product</li> <li>• CustomerType</li> <li>• RelationshipType</li> <li>• Employee</li> <li>• RoleCategory</li> <li>• EmployeeAddresses</li> <li>• AffiliationCfgTo RelationshipType</li> <li>• EmployeeAssignment</li> </ul>	<ul style="list-style-type: none"> <li>• Level</li> <li>• Zip</li> <li>• Team-Customer (Type)</li> <li>• AffiliationCfgToTeamMapping</li> <li>• AffiliationHierarchy Data</li> <li>• Team</li> <li>• Customer</li> <li>• WorkUnit</li> <li>• Customer Address</li> <li>• Zip Alignment</li> <li>• CustomerAlignment</li> <li>• CustomerTeam</li> </ul>
<b>CustomerTeam</b>	<ul style="list-style-type: none"> <li>• ExplicitAlignments</li> <li>• Role</li> <li>• LocalTeamToWork Unit</li> <li>• AffiliationCfgToRelationshipType</li> <li>• WorkUnit</li> </ul>	<ul style="list-style-type: none"> <li>• BlacklistCustomer</li> <li>• LocalTeam</li> <li>• CallActivity</li> <li>• Product</li> <li>• CallPlan</li> <li>• RelationshipType</li> <li>• Customer Address</li> </ul>	<ul style="list-style-type: none"> <li>• Level</li> <li>• Zip</li> <li>• Team-Customer (Type)</li> <li>• CustomerAlignment</li> <li>• Customer</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• AffiliationCfgToTeamMapping</li> <li>• Level To Role</li> <li>• AffiliationHierarchy</li> <li>• ProductAssignment</li> <li>• AffiliationHierarchy Data</li> <li>• RoleToProduct</li> <li>• AffiliationNetwork</li> <li>• BlacklistAlignment</li> <li>• GeoType</li> </ul>	<ul style="list-style-type: none"> <li>• RoleCategory</li> <li>• CustomerType</li> <li>• Team</li> <li>• Employee</li> <li>• Zip Alignment</li> <li>• EmployeeAddress</li> <li>• EmployeeAssignment</li> </ul>	<ul style="list-style-type: none"> <li>• CustomerTeam</li> </ul>
<b>CustomerType</b>	<ul style="list-style-type: none"> <li>• Level To Role</li> <li>• Team</li> <li>• ProductAssignment</li> <li>• AffiliationCfgToTeamMapping</li> <li>• AffiliationCfgToRelationshipType</li> <li>• AffiliationHierarchy</li> <li>• LocalTeamToWorkUnit</li> <li>• AffiliationHierarchy Data</li> <li>• RoleCategory</li> <li>• AffiliationNetwork</li> <li>• Zip</li> <li>• BlacklistAlignment</li> <li>• Level</li> <li>• BlacklistCustomer</li> </ul>	<ul style="list-style-type: none"> <li>• LocalTeam</li> <li>• CallActivity</li> <li>• Product</li> <li>• CustomerAddress</li> <li>• Role</li> <li>• CustomerAlignment</li> <li>• RoleToProduct</li> <li>• Employee</li> <li>• WorkUnit</li> <li>• EmployeeAddress</li> <li>• Zip Alignment</li> <li>• EmployeeAssignment</li> <li>• GeoType</li> </ul>	<ul style="list-style-type: none"> <li>• Team-Customer (Type)</li> <li>• ExplicitAlignments</li> <li>• CustomerType</li> <li>• CallPlan</li> <li>• RelationshipType</li> <li>• Customer</li> <li>• CustomerTeam</li> </ul>
<b>Employee</b>	<ul style="list-style-type: none"> <li>• RelationshipType</li> </ul>	<ul style="list-style-type: none"> <li>• LocalTeam</li> </ul>	<ul style="list-style-type: none"> <li>• RoleToProduct</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• GeoType</li> <li>• Zip Alignment</li> <li>• AffiliationHierarchy</li> <li>• LocalTeamToWork Unit</li> <li>• AffiliationHierarchy Data</li> <li>• RoleCategory</li> <li>• AffiliationNetwork</li> <li>• ExplicitAlignments</li> <li>• BlacklistAlignment</li> </ul>	<ul style="list-style-type: none"> <li>• BlacklistCustomer</li> <li>• Product</li> <li>• CallActivity</li> <li>• Role</li> <li>• CallPlan</li> <li>• Team-</li> <li>• Customer (Type)</li> <li>• Customer</li> <li>• Address</li> <li>• AffiliationCfgTo RelationshipType</li> <li>• CustomerType</li> </ul>	<ul style="list-style-type: none"> <li>• Level To Role</li> <li>• AffiliationCfgToTeamMapping</li> <li>• WorkUnit</li> <li>• Customer</li> <li>• Level</li> <li>• CustomerAlignment</li> <li>• ProductAssignment</li> <li>• CustomerTeam</li> <li>• Team</li> <li>• Employee</li> <li>• Zip</li> <li>• EmployeeAddress</li> <li>• EmployeeAssignment</li> </ul>
<b>EmployeesAddress</b>	<ul style="list-style-type: none"> <li>• Zip</li> <li>• ProductAssignment</li> <li>• Level To Role</li> <li>• AffiliationCfgToRelationshipType</li> <li>• RoleToProduct</li> <li>• AffiliationCfgToTeamMapping</li> <li>• GeoType</li> <li>• AffiliationHierarchy</li> <li>• LocalTeamToWork Unit</li> </ul>	<ul style="list-style-type: none"> <li>• CallActivity</li> <li>• LocalTeam</li> <li>• CallPlan</li> <li>• Product</li> <li>• Customer</li> <li>• RelationshipType</li> <li>• Customer Address</li> <li>• RoleCategory</li> <li>• Customer Alignment</li> <li>• Team</li> <li>• CustomerTeam</li> <li>• WorkUnit</li> <li>• CustomerType</li> </ul>	<ul style="list-style-type: none"> <li>• EmployeesAddress</li> <li>• Employee</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• AffiliationHierarchy Data</li> <li>• Role</li> <li>• AffiliationNetwork</li> <li>• Team-Customer (Type)</li> <li>• BlacklistAlignment</li> <li>• BlacklistCustomer</li> <li>• Level</li> </ul>	<ul style="list-style-type: none"> <li>• Zip Alignment</li> <li>• EmployeeAssignment</li> <li>• ExplicitAlignments</li> </ul>	
<b>EmployeeAssignment</b>	<ul style="list-style-type: none"> <li>• GeoType</li> <li>• RoleCategory</li> <li>• Product</li> <li>• AffiliationCfgToRelationshipType</li> <li>• AffiliationHierarchy</li> <li>• LocalTeam</li> <li>• AffiliationHierarchy Data</li> <li>• RelationshipType</li> <li>• AffiliationNetwork</li> <li>• Zip</li> <li>• BlacklistAlignment</li> <li>• ExplicitAlignments</li> <li>• BlacklistCustomer</li> </ul>	<ul style="list-style-type: none"> <li>• Level To Role</li> <li>• CallActivity</li> <li>• LocalTeamToWorkUnit</li> <li>• CallPlan</li> <li>• ProductAssignment</li> <li>• Customer</li> <li>• Role</li> <li>• Customer Address</li> <li>• RoleToProduct</li> <li>• Customer Alignment</li> <li>• Zip Alignment</li> <li>• CustomerType</li> <li>• EmployeeAddress</li> </ul>	<ul style="list-style-type: none"> <li>• WorkUnit</li> <li>• Team</li> <li>• Level</li> <li>• CustomerTeam</li> <li>• Team-Customer (Type)</li> <li>• Employee</li> <li>• AffiliationCfgToTeamMapping</li> <li>• EmployeeAssignment</li> </ul>
<b>ExplicitAlignments</b>	<ul style="list-style-type: none"> <li>• WorkUnit</li> <li>• Product</li> <li>• Level</li> <li>• AffiliationCfgToRelationshipType</li> <li>• RoleCategory</li> </ul>	<ul style="list-style-type: none"> <li>• CallActivity</li> <li>• Level To Role</li> <li>• CallPlan</li> <li>• LocalTeamToWorkUnit</li> <li>• Customer</li> </ul>	ExplicitAlignment

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• AffiliationCfgToTeamMapping</li> <li>• EmployeeAssignment</li> <li>• AffiliationHierarchy</li> <li>• LocalTeam</li> <li>• AffiliationHierarchy Data</li> <li>• RelationshipType</li> <li>• AffiliationNetwork</li> <li>• Team</li> <li>• BlacklistAlignment</li> <li>• Zip Alignment</li> <li>• BlacklistCustomer</li> <li>• GeoType</li> </ul>	<ul style="list-style-type: none"> <li>• ProductAssignment</li> <li>• CustomerAddress</li> <li>• Role</li> <li>• Customer Alignment</li> <li>• RoleToProduct</li> <li>• CustomerTeam</li> <li>• Team-Customer (Type)</li> <li>• CustomerType</li> <li>• Zip</li> <li>• Employee</li> <li>• EmployeeAddress</li> </ul>	
<b>GeoType</b>	<ul style="list-style-type: none"> <li>• ProductAssignment</li> <li>• Level To Role</li> <li>• AffiliationCfgToRelationshipType</li> <li>• RoleToProduct</li> <li>• AffiliationCfgToTeamMapping</li> <li>• ExplicitAlignments</li> <li>• AffiliationHierarchy</li> <li>• LocalTeamToWork Unit</li> <li>• AffiliationHierarchy Data</li> <li>• Role</li> <li>• AffiliationNetwork</li> </ul>	<ul style="list-style-type: none"> <li>• Level</li> <li>• CallActivity</li> <li>• LocalTeam</li> <li>• CallPlan</li> <li>• Product</li> <li>• Customer</li> <li>• RelationshipType</li> <li>• CustomerAddress</li> <li>• RoleCategory</li> <li>• CustomerAlignment</li> <li>• Team-</li> <li>• Customer (Type)</li> <li>• CustomerType</li> <li>• Zip Alignment</li> <li>• Employee</li> </ul>	<ul style="list-style-type: none"> <li>• Zip</li> <li>• Team</li> <li>• CustomerTeam</li> <li>• GeoType</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• WorkUnit</li> <li>• BlacklistAlignment</li> <li>• EmployeeAssignment</li> <li>• BlacklistCustomer</li> </ul>	<ul style="list-style-type: none"> <li>• EmployeeAddress</li> </ul>	
<b>Level</b>	<ul style="list-style-type: none"> <li>• ExplicitAlignments</li> <li>• Team-Customer (Type)</li> <li>• Product</li> <li>• AffiliationCfgToRelationshipType</li> <li>• EmployeeAddress</li> <li>• AffiliationCfgToTeamMapping</li> <li>• LocalTeam</li> <li>• AffiliationHierarchy</li> <li>• RelationshipType</li> <li>• AffiliationHierarchy Data</li> <li>• Employee</li> <li>• AffiliationNetwork</li> </ul>	<ul style="list-style-type: none"> <li>• EmployeeAssignment</li> <li>• BlacklistAlignment</li> <li>• GeoType</li> <li>• BlacklistCustomer</li> <li>• LocalTeamToWorkUnit</li> <li>• CallActivity</li> <li>• ProductAssignment</li> <li>• CallPlan</li> <li>• RoleCategory</li> <li>• CustomerAddress</li> <li>• CustomerType</li> </ul>	<ul style="list-style-type: none"> <li>• Team</li> <li>• Customer</li> <li>• Zip</li> <li>• Customer Alignment</li> <li>• RoleToProduct</li> <li>• CustomerTeam</li> <li>• WorkUnit</li> <li>• Level</li> <li>• Zip Alignment</li> <li>• Level To Role</li> <li>• Role</li> </ul>
<b>Level To Role</b>	<ul style="list-style-type: none"> <li>• EmployeeAddress</li> <li>• RelationshipType</li> <li>• LocalTeam</li> <li>• AffiliationCfgToRelationshipType</li> <li>• Zip</li> <li>• AffiliationCfgToTeamMapping</li> <li>• ExplicitAlignments</li> </ul>	<ul style="list-style-type: none"> <li>• BlacklistCustomer</li> <li>• GeoType</li> <li>• CallActivity</li> <li>• LocalTeamToWorkUnit</li> <li>• CallPlan</li> <li>• ProductAssignment</li> <li>• Customer</li> <li>• RoleCategory</li> </ul>	<ul style="list-style-type: none"> <li>• Role</li> <li>• Team</li> <li>• RoleToProduct</li> <li>• Level</li> <li>• CustomerTeam</li> <li>• Level To Role</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• AffiliationHierarchy</li> <li>• Product</li> <li>• AffiliationHierarchy Data</li> <li>• Team-Customer (Type)</li> <li>• AffiliationNetwork</li> <li>• BlacklistAlignment</li> <li>• EmployeeAssignm ent</li> </ul>	<ul style="list-style-type: none"> <li>• CustomerAddress</li> <li>• WorkUnit</li> <li>• Customer</li> <li>• Alignment</li> <li>• Zip Alignment</li> <li>• CustomerType</li> <li>• Employee</li> </ul>	
<b>LocalTeam</b>	<ul style="list-style-type: none"> <li>• ProductAssignment</li> <li>• EmployeeAssignm ent</li> <li>• Team-Customer (Type)</li> <li>• AffiliationCfgToR elationshipType</li> <li>• Level To Role</li> <li>• AffiliationCfgToTe amMapping</li> <li>• Role</li> <li>• AffiliationHierarchy</li> <li>• AffiliationHierarchy Data</li> <li>• GeoType</li> </ul>	<ul style="list-style-type: none"> <li>• AffiliationNetwork</li> <li>• Product</li> <li>• BlacklistCustomer</li> <li>• RelationshipType</li> <li>• CustomerAddress</li> <li>• RoleCategory</li> <li>• CustomerType</li> <li>• Zip</li> <li>• Employee</li> <li>• EmployeeAddress</li> </ul>	<ul style="list-style-type: none"> <li>• Level</li> <li>• Team</li> <li>• LocalTeamToWor kUnit</li> <li>• CallActivity</li> <li>• Zip Alignment</li> <li>• CallPlan</li> <li>• LocalTeam</li> <li>• Customer</li> <li>• RoleToProduct</li> <li>• Customer Alignment</li> <li>• WorkUnit</li> <li>• CustomerTeam</li> <li>• BlacklistAlignment</li> <li>• ExplicitAlignments</li> </ul>
<b>LocalTeamTo WorkUnit</b>	<ul style="list-style-type: none"> <li>• Product</li> <li>• Employee</li> <li>• Team-Customer (Type)</li> </ul>	<ul style="list-style-type: none"> <li>• AffiliationNetwork</li> <li>• Level To Role</li> <li>• BlacklistAlignmen t</li> <li>• RelationshipType</li> </ul>	<ul style="list-style-type: none"> <li>• LocalTeam</li> <li>• Team</li> <li>• ProductAssignmen t</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• AffiliationCfgToRelationshipType</li> <li>• GeoType</li> <li>• AffiliationCfgToTeamMapping</li> <li>• Role</li> <li>• AffiliationHierarchy</li> <li>• AffiliationHierarchy Data</li> <li>• EmployeeAddress</li> </ul>	<ul style="list-style-type: none"> <li>• BlacklistCustomer</li> <li>• RoleCategory</li> <li>• CallActivity</li> <li>• Zip</li> <li>• Customer</li> <li>• Address</li> <li>• CustomerType</li> </ul>	<ul style="list-style-type: none"> <li>• Customer</li> <li>• Zip Alignment</li> <li>• Customer Alignment</li> <li>• LocalTeamToWorkUnit</li> <li>• CustomerTeam</li> <li>• RoleToProduct</li> <li>• EmployeeAssignment</li> <li>• WorkUnit</li> <li>• ExplicitAlignments</li> <li>• CallPlan</li> <li>• Level</li> </ul>
<b>Product</b>	<ul style="list-style-type: none"> <li>• Zip Alignment</li> <li>• LocalTeamToWorkUnit</li> <li>• GeoType</li> <li>• AffiliationCfgToRelationshipType</li> <li>• Team</li> <li>• AffiliationCfgToTeamMapping</li> <li>• EmployeeAssignment</li> <li>• AffiliationHierarchy</li> <li>• Level To Role</li> <li>• AffiliationHierarchy Data</li> <li>• Role</li> </ul>	<ul style="list-style-type: none"> <li>• ExplicitAlignments</li> <li>• CallActivity</li> <li>• Level</li> <li>• CallPlan</li> <li>• LocalTeam</li> <li>• Customer</li> <li>• RelationshipType</li> <li>• CustomerAddress</li> <li>• RoleCategory</li> <li>• CustomerAlignment</li> <li>• Team-Customer (Type)</li> <li>• CustomerTeam</li> <li>• Zip</li> <li>• CustomerType</li> <li>• Employee</li> </ul>	<ul style="list-style-type: none"> <li>• Product</li> <li>• RoleToProduct</li> <li>• ProductAssignment</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• AffiliationNetwork</li> <li>• WorkUnit</li> <li>• BlacklistAlignment</li> <li>• EmployeeAddress</li> <li>• BlacklistCustomer</li> </ul>		
<b>ProductAssignment</b>	<ul style="list-style-type: none"> <li>• EmployeeAssignment</li> <li>• Zip</li> <li>• LocalTeamToWorkUnit</li> <li>• AffiliationCfgToRelationshipType</li> <li>• Employee</li> <li>• AffiliationHierarchy</li> <li>• GeoType</li> <li>• AffiliationHierarchyData</li> <li>• Role</li> <li>• AffiliationNetwork</li> <li>• BlacklistAlignment</li> <li>• EmployeeAddress</li> </ul>	<ul style="list-style-type: none"> <li>• BlacklistCustomer</li> <li>• ExplicitAlignments</li> <li>• CallActivity</li> <li>• LocalTeam</li> <li>• CallPlan</li> <li>• RelationshipType</li> <li>• Customer</li> <li>• RoleCategory</li> <li>• Customer</li> <li>• Address</li> <li>• ZipAlignment</li> <li>• CustomerAlignment</li> <li>• CustomerType</li> </ul>	<ul style="list-style-type: none"> <li>• AffiliationCfgToTeamMapping</li> <li>• Product</li> <li>• Team</li> <li>• ProductAssignment</li> <li>• WorkUnit</li> <li>• CustomerTeam</li> <li>• RoleToProduct</li> <li>• Level</li> <li>• Team-Customer (Type)</li> <li>• Level To Role</li> </ul>
<b>Relationship Type</b>	<ul style="list-style-type: none"> <li>• Level</li> <li>• RoleToProduct</li> <li>• Product</li> <li>• AffiliationHierarchy</li> <li>• Zip</li> <li>• BlacklistAlignment</li> <li>• LocalTeam</li> <li>• BlacklistCustomer</li> <li>• Role</li> </ul>	<ul style="list-style-type: none"> <li>• CustomerAddress</li> <li>• LocalTeamToWorkUnit</li> <li>• CustomerAlignment</li> <li>• ProductAssignment</li> <li>• CustomerTeam</li> <li>• RoleCategory</li> <li>• Employee</li> <li>• Team</li> </ul>	<ul style="list-style-type: none"> <li>• AffiliationNetwork</li> <li>• RelationshipType</li> <li>• CustomerType</li> <li>• AffiliationCfgToRelationshipType</li> <li>• AffiliationHierarchyData</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• CallActivity</li> <li>• Team-Customer (Type)</li> <li>• CallPlan</li> <li>• AffiliationCfgToTeamMapping</li> <li>• Customer</li> <li>• Level To Role</li> </ul>	<ul style="list-style-type: none"> <li>• EmployeeAddress</li> <li>• WorkUnit</li> <li>• EmployeeAssignment</li> <li>• Zip Alignment</li> <li>• ExplicitAlignments</li> <li>• GeoType</li> </ul>	
<b>Role</b>	<ul style="list-style-type: none"> <li>• Employee</li> <li>• ProductAssignment</li> <li>• GeoType</li> <li>• AffiliationCfgToRelationshipType</li> <li>• Zip Alignment</li> <li>• AffiliationCfgToTeamMapping</li> <li>• EmployeeAssignment</li> <li>• AffiliationHierarchy</li> <li>• LocalTeamToWorkUnit</li> <li>• AffiliationHierarchy Data</li> <li>• Team</li> <li>• AffiliationNetwork</li> <li>• CustomerType</li> <li>• BlacklistAlignment</li> </ul>	<ul style="list-style-type: none"> <li>• EmployeeAddress</li> <li>• BlacklistCustomer</li> <li>• ExplicitAlignments</li> <li>• CallActivity</li> <li>• Level</li> <li>• CallPlan</li> <li>• Product</li> <li>• Customer</li> <li>• RelationshipType</li> <li>• CustomerAddress</li> <li>• Team- Customer (Type)</li> <li>• CustomerAlignment</li> <li>• CustomerTeam</li> </ul>	<ul style="list-style-type: none"> <li>• WorkUnit</li> <li>• RoleToProduct</li> <li>• LocalTeam</li> <li>• Zip</li> <li>• Role</li> <li>• RoleCategory</li> </ul>
<b>RoleCategory</b>	<ul style="list-style-type: none"> <li>• AffiliationHierarchy</li> <li>• AffiliationCfgToRelationshipType</li> </ul>	<ul style="list-style-type: none"> <li>• CallActivity</li> <li>• Level</li> <li>• CallPlan</li> </ul>	<ul style="list-style-type: none"> <li>• RoleCategory</li> <li>• Role</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• AffiliationHierarchy Data</li> <li>• LocalTeamToWork Unit</li> <li>• GeoType</li> <li>• RoleToProduct</li> <li>• AffiliationCfgToTeamMapping</li> <li>• EmployeeAssignment</li> <li>• Level To Role</li> <li>• ProductAssignment</li> <li>• AffiliationNetwork</li> <li>• Team-Customer (Type)</li> <li>• BlacklistAlignment</li> <li>• BlacklistCustomer</li> <li>• ExplicitAlignments</li> </ul>	<ul style="list-style-type: none"> <li>• LocalTeam</li> <li>• Customer</li> <li>• Product</li> <li>• CustomerAddress</li> <li>• RelationshipType</li> <li>• CustomerAlignment</li> <li>• Team</li> <li>• CustomerTeam</li> <li>• WorkUnit</li> <li>• CustomerType</li> <li>• Employee</li> <li>• EmployeeAddress</li> <li>• Zip</li> <li>• Zip Alignment</li> </ul>	
<b>RoleToProduct</b>	<ul style="list-style-type: none"> <li>• LocalTeamToWork Unit</li> <li>• GeoType</li> <li>• AffiliationCfgToRelationshipType</li> <li>• Team-Customer (Type)</li> <li>• AffiliationCfgToTeamMapping</li> <li>• EmployeeAssignment</li> <li>• AffiliationHierarchy</li> </ul>	<ul style="list-style-type: none"> <li>• ExplicitAlignments</li> <li>• CallActivity</li> <li>• Level</li> <li>• CallPlan</li> <li>• LocalTeam</li> <li>• Customer</li> <li>• RelationshipType</li> <li>• CustomerAddress</li> <li>• Team</li> <li>• CustomerAlignment</li> <li>• WorkUnit</li> <li>• CustomerTeam</li> </ul>	<ul style="list-style-type: none"> <li>• RoleToProduct</li> <li>• Role</li> <li>• Product</li> <li>• ProductAssignment</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• Level To Role</li> <li>• AffiliationHierarchy Data</li> <li>• RoleCategory</li> <li>• AffiliationNetwork</li> <li>• Zip</li> <li>• BlacklistAlignment</li> <li>• EmployeeAddress</li> <li>• BlacklistCustomer</li> </ul>	<ul style="list-style-type: none"> <li>• Zip Alignment</li> <li>• CustomerType</li> <li>• Employee</li> </ul>	
<b>Team</b>	<ul style="list-style-type: none"> <li>• Employee</li> <li>• RelationshipType</li> <li>• LocalTeam</li> <li>• AffiliationHierarchy</li> <li>• AffiliationCfgToRelationshipType</li> <li>• AffiliationHierarchy Data</li> <li>• EmployeeAddress</li> </ul>	<ul style="list-style-type: none"> <li>• AffiliationNetwork</li> <li>• Product</li> <li>• BlacklistCustomer</li> <li>• RoleCategory</li> <li>• CustomerAddress</li> <li>• CustomerType</li> </ul>	<ul style="list-style-type: none"> <li>• Role</li> <li>• Level</li> <li>• WorkUnit</li> <li>• AffiliationCfgToTeamMapping</li> <li>• LocalTeamToWorkUnit</li> <li>• BlacklistAlignment</li> <li>• Team</li> <li>• CallActivity</li> <li>• Zip Alignment</li> <li>• CallPlan</li> <li>• Level To Role</li> <li>• Customer</li> <li>• ProductAssignment</li> <li>• CustomerAlignment</li> <li>• RoleToProduct</li> <li>• CustomerTeam</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
			<ul style="list-style-type: none"> <li>• Team-Customer (Type)</li> </ul>
<b>WorkUnit</b>	<ul style="list-style-type: none"> <li>• Employee</li> <li>• RelationshipType</li> <li>• GeoType</li> <li>• AffiliationCfgToRelationshipType</li> <li>• RoleCategory</li> <li>• AffiliationHierarchy</li> <li>• EmployeeAddress</li> </ul>	<ul style="list-style-type: none"> <li>• AffiliationHierarchyData</li> <li>• Product</li> <li>• AffiliationNetwork</li> <li>• Role</li> <li>• BlacklistCustomer</li> <li>• CustomerType</li> </ul>	<ul style="list-style-type: none"> <li>• RoleToProduct</li> <li>• Level To Role</li> <li>• Zip</li> <li>• BlacklistAlignment</li> <li>• LocalTeamToWorkUnit</li> <li>• CallActivity</li> <li>• Team-Customer (Type)</li> <li>• CallPlan</li> <li>• AffiliationCfgToTeamMapping</li> <li>• Customer</li> <li>• LocalTeam</li> <li>• CustomerAddress</li> <li>• ProductAssignment</li> <li>• CustomerAlignment</li> <li>• Team</li> <li>• CustomerTeam</li> <li>• WorkUnit</li> <li>• EmployeeAssignment</li> <li>• Zip Alignment</li> <li>• ExplicitAlignments</li> <li>• Level</li> </ul>
<b>Zip</b>	<ul style="list-style-type: none"> <li>• ExplicitAlignments</li> </ul>	<ul style="list-style-type: none"> <li>• BlacklistCustomer</li> </ul>	<ul style="list-style-type: none"> <li>• GeoType</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"> <li>• Role</li> <li>• LocalTeamToWork Unit</li> <li>• AffiliationCfgToRelationshipType</li> <li>• Team-Customer (Type)</li> <li>• AffiliationCfgToTeamMapping</li> <li>• Level To Role</li> <li>• AffiliationHierarchy</li> <li>• ProductAssignment</li> <li>• AffiliationHierarchy Data</li> <li>• RoleToProduct</li> <li>• AffiliationNetwork</li> <li>• BlacklistAlignment</li> <li>• Level</li> </ul>	<ul style="list-style-type: none"> <li>• LocalTeam</li> <li>• CallActivity</li> <li>• Product</li> <li>• CallPlan</li> <li>• RelationshipType</li> <li>• CustomerAlignment</li> <li>• RoleCategory</li> <li>• CustomerType</li> <li>• Team</li> <li>• Employee</li> <li>• WorkUnit</li> <li>• EmployeeAddress</li> <li>• EmployeeAssignment</li> </ul>	<ul style="list-style-type: none"> <li>• Zip Alignment</li> <li>• Zip</li> <li>• Customer Address</li> <li>• Customer</li> <li>• CustomerTeam</li> </ul>
<b>ZipAlignment</b>	<ul style="list-style-type: none"> <li>• GeoType</li> <li>• RoleCategory</li> <li>• Product</li> <li>• AffiliationCfgToRelationshipType</li> <li>• EmployeeAssignment</li> <li>• AffiliationCfgToTeamMapping</li> <li>• LocalTeam</li> <li>• AffiliationHierarchy</li> <li>• RelationshipType</li> </ul>	<ul style="list-style-type: none"> <li>• BlacklistAlignment</li> <li>• Level To Role</li> <li>• BlacklistCustomer</li> <li>• LocalTeamToWorkUnit</li> <li>• CallActivity</li> <li>• ProductAssignment</li> <li>• CallPlan</li> <li>• Role</li> <li>• CustomerType</li> <li>• RoleToProduct</li> <li>• Employee</li> </ul>	<ul style="list-style-type: none"> <li>• WorkUnit</li> <li>• Team</li> <li>• Zip Alignment</li> <li>• Customer Address</li> <li>• Team-Customer (Type)</li> <li>• Customer Alignment</li> <li>• Zip</li> <li>• CustomerTeam</li> <li>• Customer</li> <li>• Level</li> </ul>

Object	Parallel Processing Objects		Sequential Processing Objects
	<ul style="list-style-type: none"><li>AffiliationHierarchy Data</li><li>AffiliationNetwork</li><li>ExplicitAlignments</li></ul>	<ul style="list-style-type: none"><li>EmployeeAddress</li></ul>	

## Performance Stats and Supported Volume Maximum Records Supported for Bulk Import – Initial Setup

The table below shows the maximum full feed volume, maximum volume in a team (across timeline & in a single day) and maximum records per file for add operation. Below Numbers are applicable during initial Instance Setup:

Object	Full Volume in the System	Max Volume Supported in a Team	Max Volume Supported in a Team (in a Single Day)	Maximum Records Per File- (Operation: Add)	Remarks
<b>Affiliation Group Configuration Changes</b>	200	1	1	200	
<b>Affiliation Group Data Upload</b>	11,000,000	5,800,000	5,800,000	2,000,000	
<b>Affiliation Network Data</b>	11,000,000	5,800,000	5,800,000	3,000,000	
<b>Affiliation Network Custom Field</b>	1,000,000	NA	NA	1,000,000	
<b>Blacklist Customers</b>	1,000,000	250,000	250,000	500,000	
<b>Blacklist Alignments</b>	1,000,000	300,000	90,000	500,000	
<b>Business Rules</b>	4,000	20	20	NA	Max Team Selection in Eligibility rule - 30 Max Team selection in Alignment rule - 100.

<b>Object</b>	<b>Full Volume in the System</b>	<b>Max Volume Supported in a Team</b>	<b>Max Volume Supported in a Team (in a Single Day)</b>	<b>Maximum Records Per File- (Operation: Add)</b>	<b>Remarks</b>
<b>Business Rule Category</b>	200	25	25	NA	The count of categories includes both Global and Team, and Alignment rule types, with a suggested limit of ten rules per category.
<b>Guardrail</b>	6	5	5	NA	
<b>Business Unit</b>	30	10	10	30	
<b>Customer</b>	9,600,000	4,500,000	3,670,000	3,000,000	4.5 million count includes aligned and unaligned customers. Removing a customer auto removes associated addresses, alignments across teams, as well as affiliates and mirrored alignments. A 10K customer removal number refers to individual customers without dependent entities.
<b>Customer Custom field</b>	15,000,000	4,500,000	3,670,000	3,000,000	
<b>Customer Address</b>	13,370,000	3,670,000	3,670,000	3,000,000	

Object	Full Volume in the System	Max Volume Supported in a Team	Max Volume Supported in a Team (in a Single Day)	Maximum Records Per File- (Operation: Add)	Remarks
<b>Customer Alignment</b>	67,000,000	5,000,000	3,000,000	3,000,000 for 1- 2 teams 30,000 for 3- 10 teams 2,500 for more than 50 team.	These customer alignment volumes are combined numbers for all alignment sources (Geo-based, Call Plan, Call Activity, Explicit, etc.)
<b>Customer Unaligned Pool</b>	197,000,00 (When 30 MN active Alignments are present) 10,000,000 (When 100 MN alignments are present)	3,670,000	3,670,000	3,000,000 for 1-2 teams 30,000 for 3- 10 teams 2,500 for more than 50 team.	
<b>Customer Types</b>	25	7	7	25	Customer Type countless than five may impact business rules performance.
<b>Customer team custom field</b>	12,000,000	2,000,000	2,000,000	3,000,000	
<b>Customer Product custom field</b>	800,000	50,000	50,000	800,000	
<b>Country</b>	150	10	10	150	
<b>Call Plan</b>	1,000,000	1,000,000	1,000,000	1,000,000	

<b>Object</b>	<b>Full Volume in the System</b>	<b>Max Volume Supported in a Team</b>	<b>Max Volume Supported in a Team (in a Single Day)</b>	<b>Maximum Records Per File- (Operation: Add)</b>	<b>Remarks</b>
<b>Call Plan (Product Grain)</b>	3,000,000	1,000,000	1,000,000	3,000,000	
<b>Call Activity</b>	4,500,000	1,000,000	1,000,000	3,000,000	
<b>Call Activity (Product Grain)</b>	3,000,000	1,000,000	1,000,000	3,000,000	
<b>Call Activity Custom Field</b>	4,500,000	1,000,000	1,000,000	3,000,000	These numbers are supported in case if metric values are ingested in the same file as data.
<b>Call Plan Custom Field</b>	1,000,000	1,000,000	1,000,000	1,000,000	These numbers are supported in case if metric values are ingested in the same file as data.
<b>Custom Fields</b>	600	NA	NA	100	
<b>Custom Field team Role visibility</b>	350,000	NA	NA	100,000	
<b>Custom Field team Customer type visibility</b>	500	NA	NA	500	
<b>Customer Address Custom Field</b>	7,500,000	3,670,000	3,670,000	3,000,000	
<b>Employee</b>	47,000	1500	1,500	30,000	

<b>Object</b>	<b>Full Volume in the System</b>	<b>Max Volume Supported in a Team</b>	<b>Max Volume Supported in a Team (in a Single Day)</b>	<b>Maximum Records Per File- (Operation: Add)</b>	<b>Remarks</b>
<b>Employee Address</b>	30,000	3,000	3,000	30,000	
<b>Employee Assignment</b>	39,000 for non-DR for instance 39,000 for DR Instance	2,600	1,300	30,000	The count includes both primary and secondary assignments. If any employee is assigned to multiple territories, those are counted as distinct records.
<b>Explicit Alignments from external sources</b>	3,500,000	1,000,000	1,000,000	3,000,000	
<b>Explicit External Alignment Custom Field</b>	3,500,000	1,000,000	1,000,000	3,000,000	
<b>Employee Assignment Custom Field</b>	30,000	NA	NA	30,000	
<b>Employee Custom Field</b>	47,000	NA	NA	30,000	
<b>Employee Event</b>	46,000	NA	NA	30,000	
<b>GEOs (Zips, Bricks, Macrobricks etc.)</b>	250,000	140,000	60,000	41,000	Removal of Geos has the following impacts:

Object	Full Volume in the System	Max Volume Supported in a Team	Max Volume Supported in a Team (in a Single Day)	Maximum Records Per File- (Operation: Add)	Remarks
					<ul style="list-style-type: none"> <li>• Removes impacted Geo alignments.</li> <li>• Balances remaining geo alignment in case of sharing</li> <li>• Removes associated customer and affiliated alignment.</li> <li>• Mirrored changes and balances alignments across different teams leading to a heavy operation</li> </ul>
<b>Geo Alignment</b>	10,000,000	140,000	68,000	2,000,000 across 48 teams	
<b>Hierarchy Levels</b>	2,000	8	8	2,000	Removal of level has smart removal logic where the system identifies and removes: <ul style="list-style-type: none"> <li>• Work Units at these levels Employee</li> </ul>

Object	Full Volume in the System	Max Volume Supported in a Team	Max Volume Supported in a Team (in a Single Day)	Maximum Records Per File- (Operation: Add)	Remarks
					<ul style="list-style-type: none"> <li>• Assignments Customer alignments</li> <li>• Zip alignments</li> <li>• Product Assignments from the impacted Work Units.</li> </ul>
<b>Level to Role Mapping</b>	4,500	160	160	4,500	
<b>Level to Country</b>	80	1	1	80	
<b>Level to Business Unit</b>	30	1	1	30	
<b>Local Team</b>	50	2	2	50	
<b>Local Team to work Unit</b>	5,000	160	160	5,000	<ul style="list-style-type: none"> <li>• 500 workunits mapped to 1 local team – 40 teams</li> <li>• 300 workunits each mapped to 3 local teams.</li> <li>• Remaining 3600 workunits mapped to 22 local teams with average count</li> </ul>

					being around 160-170
<b>Max Rules per category</b>	200	NA	NA	NA	
<b>Mirroring Configuration</b>	50	2	2	50	
<b>Object</b>	<b>Full Volume in the System</b>	<b>Max Volume Supported in a Team</b>	<b>Max Volume Supported in a Team (in a Single Day)</b>	<b>Maximum Records Per File- (Operation: Add)</b>	<b>Remarks</b>
<b>Position</b>	30,000	3,000	2,400	30,000	
<b>Product</b>	40,000	3,000	1,670	40,000	Product counts are across all levels of the Product Hierarchy.
<b>Product level Alignment (Explicit)</b>	3,000,000	2,000,000	2,000,000	500,000	
<b>Product level Alignment (Implicit)</b>	3,000,000	3,000,000	3,000,000	NA	Implicit Alignment are generated through Alignment Refresh
<b>Product Assignment</b>	300,000	10,000	6,000	280,000	Product Assignment has two workflows - with or without 100% product assignment sum validation. The volume support in bulk import would remain same irrespective of the workflow. Please reach out to your ZAIDYN POC for more details.
<b>Product Custom Field</b>	36,000	NA	NA	36,000	

<b>Product Assignment Custom Field</b>	300,000	NA	NA	300,000	
<b>Role to Product Mapping</b>	22,000	355	355	22,000	
<b>Role</b>	1,100	200	65	1,100	
<b>Role Custom field</b>	1100	200	65	1100	
<b>Relationship Type Changes</b>	50	6	6	50	
<b>Role Category</b>	122	NA	NA	122	
<b>Role Category Custom Field</b>	122	NA	NA	122	
<b>Teams</b>	400	1	1	250	<p>Removal of teams has smart removal logic where the system identifies and removes:</p> <ul style="list-style-type: none"> <li>• Connected non-shared levels. Segregate shared levels.</li> <li>• Work units on the respective levels.</li> <li>• End date Customer and Zip alignments from impacted Work Units.</li> <li>• Primary and secondary assignments from these Work Units.</li> <li>• Level to role mapping and the</li> </ul>

					product assignments.
<b>Team Custom field</b>	400	1	1	250	
<b>Teams per Country</b>	300	1	1	250	
<b>Teams per Business Unit</b>	100	1	1	50	
<b>Team to Customer Type</b>	1000	7	7	1000	
<b>Work Unit</b>	15,000	2,900	2,900	15,000	When Work Units are removed, associated employee assignments and product assignments are also removed. These include home office and Field Work Units.
<b>Work Unit Custom Field</b>	15,000	2,900	2,900	15,000	
<b>Work unit Relationship</b>	100,000	2,900	2,900	100,000	

### Maximum Records Supported for a Work Unit

The table below shows the maximum records that can be mapped/associated within a single Workunit.

<b>NFR Criteria</b>	<b>Work Units supporting position</b>	<b>Work Unit not supporting Position</b>
<b>No of positions</b>	20	1
<b>No of Product assignments across all positions</b>	160	160
<b>No of Employee assignment – primary</b>	20	1
<b>No of Employee assignment – secondary</b>	35 (max 15 per position)	35

<b>NFR Criteria</b>	<b>Work Units supporting position</b>	<b>Work Unit not supporting Position</b>
<b>No of Customer alignments (Implicit + explicit) * at orgunit level</b>	300,000	300,000
<b>No of Zip alignments</b>	10,000	10,000
<b>No of Roles</b>	10	10
<b>No of Workunits</b>	NA	NA

## **Maximum Records Supported for a Position**

The table below shows the maximum records that can be mapped/associated within a single Position.

<b>NFR Criteria</b>	<b>Max datapoint at position level for DR</b>
<b>No of positions</b>	NA
<b>No of Product assignments across all positions</b>	160
<b>No of Employee assignment – primary</b>	1
<b>No of Employee assignment – secondary</b>	15
<b>No of Customer alignments (Implicit + explicit) * at orgunit level</b>	NA
<b>No of Zip alignments</b>	NA
<b>No of Roles</b>	10
<b>No of Workunits</b>	NA

## Maximum Records Supported for Workload Centre metrics

The table below shows the maximum metrics that can be created at Geo & Customer grain.

Metrics	Count
Workload center on Customer	28
Workload center on zip	27
<b>Total Workload Center metrics</b>	<b>55</b>

Also, the table below shows count of Custom fields & calculated fields supported at Geo & Customer grain.

Workload Center on Entity type	Type	Metric Count
Customer	Custom Fields	17
	Calculated Fields	11
Zip	Custom Fields	16
	Calculated Fields	11


## Maximum Records Supported for Bulk Import - Delta Changes

The table below shows the maximum full feed volume, maximum volume in a team (across timeline & in a single day) and maximum records per file for add/edit/ remove operation.

Object	Add	Edit	Remove
<b>Affiliation Network</b>	300,000	300,000	5000
<b>Affiliation Group Data</b>	300,000	300,000	5000
<b>Blacklist Customer</b>	20,000	20,000	20,000
<b>Blacklist customer Alignment</b>	30,000 (5 Teams)	30,000 (5 Teams)	30,000 (5 teams)
<b>Call Plan Attributes *</b>	100,000 (40 teams)	100,000 (40 Teams)	NA
<b>Call Activity Attributes *</b>	100,000 (40 teams)	100,000 (40 Teams)	NA
<b>Call Activity</b>	100,000 (40 Teams)	100,000 (40 Teams)	10,000 (10 Teams)
<b>Call Activity (Product Grain)</b>	450,000 (10 Teams)	450,000 (10 Teams)	100,000 (10 Teams)
<b>Call Plan</b>	100,000 (40 Teams)	100,000 (40 Teams)	10,000 (10 Teams)
<b>Call Plan (Product grain)</b>	50,000 (10 Teams)	50,000 (10 Teams)	50,000 (10 teams)
<b>Customer</b>	85,000 (with affected team Count 150)	85,000 (with affected team Count 150)	10,000 (with affected team Count 150)
<b>Customer Attribute</b>	60,000	60,000	NA
<b>Customer Alignment</b>	3,000,000 for 2 Team, 30,000 for 10 Teams, 2,500 for 50 Teams	3,000,000 for 2 Team, 30,000 for 10 Teams, 2,500 for 50 Teams	3,000,000 for 2 Teams, 2500 for 15 Teams
<b>Customer Type</b>	25	5	2
<b>Customer Address</b>	190,000	190,000	10,000
<b>Customer Team Attributes</b>	100,000 (100 Teams)	100,000 (100 Teams)	NA
<b>Customer Address Custom Field</b>	190,000	190,000	NA
<b>Customer Product Attributes</b>	100,000	100,000	NA
<b>Custom Fields</b>	100	100	30

<b>Custom Fields Team Role Visibility</b>	100,000	NA	30,000
<b>Custom field customer type visibility</b>	50	NA	20
<b>Employee Assignment Attributes</b>	4500 for 5 Attributes	4500 for 5 Attributes	NA
<b>Employee</b>	5000	5000	5000
<b>Employee Address</b>	5000	5000	5000
<b>Employee Leave</b>	100,000	100,000	100,000
<b>Employee Event</b>	10,000	10,000	NA
<b>External Explicit</b>	100,000 (40 Teams)	100,000 (40 Teams)	10,000 (10 Teams)
<b>Employee Attributes</b>	4500 for 5 Attributes	4500 for 5 Attributes	NA
<b>Employee Assignment</b>	5000	5000	1000
<b>External Explicit Alignment Attributes</b>	10,000 (10 Teams)	10,000 (10 Team)	NA
<b>Level</b>	20	20	5
<b>Level to Role</b>	1000	1000	1000
<b>Position</b>	5,000	5,000	1,000
<b>Product</b>	5,000	5,000	5,000
<b>Product Assignment</b>	20,000	20,000	20,000
<b>Product Attributes</b>	5,000	5,000	NA
<b>Product level Alignment</b>	100,000 (5 Teams)	100,000 (5 Teams)	100,000 (5 Teams)
<b>Role to Product</b>	2000	1000	100
<b>Role Attributes</b>	200	200	NA
<b>Role Category</b>	10	10	2
<b>Role</b>	200	200	100
<b>Team Attributes</b>	50 team for 5 team Attributes	50 team for 5 team Attributes	NA
<b>Team</b>	50	50	5
<b>Team to Customer Type</b>	25	20	5

<b>Geo Alignment</b>	200,000 for 5 teams	200,000 for 5 teams	1,0000 for single team/ 500 for 12 Teams
<b>Geo codes Attributes</b>	41000 for 5 Attributes, affected team 400	41000 for 5 Attributes, affected team 400	NA
<b>Geo codes</b>	5,000	5,000	500
<b>Work Unit</b>	500 for affected team count 80	500 for affected team count 80	50 for affected team count 50
<b>Work Unit Id</b>	NA	200	NA
<b>Work Unit Relationship</b>	1000	1000	1000

	<b>Note:</b> *These numbers are supported in case if metric values are ingested in the same file as data.
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**Important Notes:**

The maximum volume support mentioned here is provided as a benchmark and should not be considered a standard limit. Performance and scalability of the system can also be affected by additional factors, including:

- **Object-Level Dependent Mappings:** The presence of varying count of connection between objects can have an impact on the system's performance.

As the number of team to customer type mapping increases, the time required for customer alignment import will increase proportionally. This means that as you add more team to customer type mapping, it will take longer to import the customer alignment data.

- **Existing Data in the System:** The volume of active data already present in the system can affect the performance of bulk import operations.

During the initial setup with no data, ZAIDYN will support the upload of 3 million customer address records at rapid pace (example: approximately 33 minutes). However, if 3 million customer address records are already present in the system, the import process will take longer. In this case, it might require approximately 45 minutes to complete the import task.

- **Single Team Vs. Multi-Team Upload:** Uploading records for a single team versus a multi- team upload can have implications for performance and volume. The system's behavior, timings, and supported volume may differ depending on the team mapping.

For an instance Customer Alignment Upload:

- 3,000,000 records are supported if operation done for 1-2 Teams in a single file.
  - 30,000 records supported if operation done for more than 10 Teams in a single file.
- **A Single WorkUnitId along with Position** can be renumbered **4** times across timelines for **1.2K** work units & **2.4k** Positions.

## Simultaneous User Support


Operation	User Supported	Comment
<b>Simultaneous Users Logins</b>	500	System is designed and benchmarked to handle up to 500 simultaneous users logging at the same time.
<b>Simultaneous Users with Read Operations</b>	200	200 users can perform read operations simultaneously over the course of an hour. Read operations generally involve viewing the map, roster hierarchy, preview reports, etc.
<b>Simultaneous User performing Write/Change Operation</b>	10	Up to 10 users can perform write operations simultaneously. This typically refers to actions such as alignment/assignment changes, team creation, scenario creation, etc.



**Note:** The numbers were obtained by simulating 500 users accessing the system simultaneously for one hour. The actual performance may vary depending on the volume of data on the instance, the specific actions performed by different users, and any concurrent operations taking place etc.


## Maximum Records Support during File Export

The table below shows the recommended records that can be exported from each exporting those records.

	<b>Note:</b> Please consider these timings as benchmarks rather than standard limits.
---	---

Object	Maximum Records in a Single File per Object
Customer TypeChanges	24
EmployeeChanges	47,000
Employee Address Changes	42,000
Role CategoryChanges	120
Product Changes	35,000
Role Changes	1100
Relationship TypeChanges	50
Country Changes	150
CustomerChanges	9,610,000
Customer Address Changes	13,370,000
Geo CodeChanges	250,000
Level Changes	2,000
Role ProductChanges	22,000
Team Changes	400
Local TeamChanges	50
Level to RoleChanges	4,500
Team To Customer TypeChanges	1,000
Affiliation GroupConfiguration Changes	200
Affiliation Configuration to Relationship TypeChanges	200
Affiliation Configuration to teammapping changes	8
Work UnitChanges	15,000
Local Team to WorkUnit Changes	5,000

<b>Object</b>	<b>Maximum Records in a Single File per Object</b>
<b>CustomerAlignment Changes (Only Aligned)</b>	60,000,000
<b>Customer Alignment changes (Including UnAligned source)</b>	170,000,000
<b>Geo CodeAlignmentChanges</b>	10,000,000
<b>Employee AssignmentChanges</b>	32,000
<b>Product AssignmentChanges</b>	300,000
<b>Product Level Alignment</b>	3,000,000
<b>Call ActivityChanges</b>	4,500,000
<b>Call Activity changes (Product Grain)</b>	4,500,000
<b>Call PlanChanges</b>	1,000,000
<b>Call Plan changes (product Grain)</b>	3,000,000
<b>Blacklist CustomersChanges</b>	1,000,000
<b>Blacklist AlignmentChanges</b>	1,000,000
<b>Affiliation Network</b>	13,000,000
<b>AlignmentFullFeed</b>	67,000,000
<b>Customer-Team</b>	12,000,000
<b>Explicit External Alignment</b>	3,000,000
<b>Level To Business Unit</b>	30
<b>Level To Country</b>	80
<b>Level To Role</b>	4,500
<b>Position</b>	30,000
<b>Customer Address Custom Fields</b>	7,500,000
<b>Custom Field</b>	600
<b>Custom Field to team Role visibility</b>	350,000
<b>Custom Field to Customer Type visibility</b>	500
<b>Work Unit Relationship</b>	100,000

 **Note:** The Above numbers are valid for single day export, Export without end date is not supported.



## Maximum Record Supported during Reports Download

In the following table, you will get the maximum number of records can be downloaded for the different reports.

Report Name	Volume Supported for Report Download (Without Custom Field) (Across 20 teams)	Volume Supported for Report Download (With Custom Field) (Across 20 teams)	Custom Field Count Supported for Report Download
Customer Alignment Standard Summary	25,000,000	10,000,000	50
ZIP Alignment Standard Summary	830,000	830,000	50
Customer Alignment Change Report	25,000,000	25,000,000	NA
Customer Alignment Coverage Report	20,000,000	10,000,000	7
ZIP Alignment Coverage Report	830,000	830,000	NA
Product Assignment	240,000	240,000	5
Work Unit Balance	5000	2000	65
Customer Change	5,000,000	5,000,000	NA
Customer Standard Summary	8,000,000	2,000,000	50

<b>Report Name</b>	<b>Volume Supported for Report Download (Without Custom Field)</b>	<b>Volume Supported for Report Download (With Custom Field)</b>	<b>Custom Field Count Supported for Report Download</b>
<b>Customer Blacklist</b>	500,000	500,000	NA
<b>Zip Alignment Change Report</b>	1,000,000	1,000,000	NA
<b>Employee Assignment</b>	15,000	5000	30
<b>Employee Assignment Change</b>	15,000	15,000	NA
<b>Product Assignment Change</b>	100,000	100,000	NA
<b>Work Unit Change</b>	4000	4000	NA
<b>Position Change</b>	6000	6000	NA
<b>Work Unit Additional Access</b>	1000	1000	NA
<b>PLA change Report</b>	5,000,000	NA	NA

## Maximum Report Template Supported in System

<b>Supported Template</b>	<b>Values</b>
<b>Max count of templates created in an instance</b>	2300
<b>Maximum users with whom a template can be shared</b>	1700
<b>Maximum templates that can be created by a user for a report in active mode</b>	10
<b>Maximum templates that can be created by a user for a report in scenario mode</b>	5

## Latest Performance Testing Summary

In the following table, you will find key findings, trends, and results related to the performance of various user interface (UI) and Bulk Operations. These findings highlight the efficiency, effectiveness, and user experience associated with different user interface (UI) designs and bulk operations across different modules.

Module	Volume Supported and Test Benchmark
Batch Ingestion	<ul style="list-style-type: none"> <li>• Full load (initial setup) tested for all entities as per product volume (Maximum) Records Supported for Bulk Import) to process within 27 hours.</li> <li>• Delta load for all entities ranging between 0-20% of full feed volume to process within 12 hours.</li> </ul>
Rule Refresh	<ul style="list-style-type: none"> <li>• <b>Full Refresh</b> (For Initial Setup, or complete data is changed/rules are changed): Tested for 300 teams to generate ~33M alignments within 48-72 hours.</li> <li>• <b>Delta Refresh</b> (when only a subset of customer data is changed): Tested for 300 teams where Delta alignments are between 0-20K per team to process alignments within 8 hours. (8 hours also counts the timings of delta batch ingestion and export of pre-requisite entities and alignments.)</li> </ul>
Batch Export	Export tested for all entities as per product volume to process within 2 hours.
<b>UI – General and Admin Action</b>	<p>Alignment Map and Requests:</p> <ul style="list-style-type: none"> <li>• It is recommended and tested to use Lasso for multi-selection with a limit of 19k entities, including customers(max 1000), Associated customers and ZIP codes(Max 500).</li> <li>• Alignment change is supported for approximately 1500 changes (500 ZIP codes and 1000 customers, and up to 19K associated customers) and takes approximately 1 minute and 45 seconds to complete.</li> <li>• Read activities such as search, viewing grid details, zoom and pan takes between ~5-10 seconds depending on volume/complexity of data.</li> <li>• Filter on Map page takes around 20 sec to complete for 2,000,000 customers in filters</li> <li>• Request details preview and submission runs asynchronously and takes around ~45 seconds for 1000 changes and ~1 minute 20 seconds for 5K changes.</li> </ul>

Module	Volume Supported and Test Benchmark
	<p>Roster:</p> <ul style="list-style-type: none"> <li>• Operations such as search, filter, drill down takes between ~5-8 seconds for completion.</li> <li>• Operations such as add/edit assignment/Work Unit takes between ~10-12 seconds for completion.</li> <li>• Work Unit deletion from UI takes between ~15 Min. when there are 50,000 dependent alignment present</li> </ul> <p>Overview:</p> <ul style="list-style-type: none"> <li>• Viewing details on Overview page widgets takes between ~15- 20 sec. for customer fields (For calculates fields numbers varies based on the condition defined)</li> </ul> <p>Scenario Modeling:</p> <ul style="list-style-type: none"> <li>• For basic alignment and assignment operation timing will be similar to active mode</li> <li>• Scenario with 500 direct changes and 5,000 associated changes takes around 10 Mins.</li> </ul> <p>Admin:</p> <ul style="list-style-type: none"> <li>• Read/View action on admin page takes around ~10 seconds.</li> <li>• Write/Change action is observed to take around ~15 seconds for completion</li> </ul>
<p><b>Report Creation and Download</b></p>	<ul style="list-style-type: none"> <li>• Create action for certain heavy data generation reports such as Customer/zip Alignment Standard Summary takes ~15 seconds for 1 team, ~20 seconds for 3 teams, and ~25 seconds for 5 teams.</li> <li>• Maximum volume supported for Customer Alignment Standard Summary reports - 10M for 5 teams and takes ~25 seconds to create report, and download job starts within ~5 seconds and takes ~15 minutes to complete.</li> <li>• Create action for certain heavy data generation reports such as Customer Alignment change takes ~20 seconds for 1 team, ~35 seconds for 3 teams, and ~90 seconds for 5 teams for duration of one year. Max download count supported is 10,000,000 for 5 teams.</li> <li>• Creation of other reports complete within ~5 seconds for 1 team, ~10 seconds for 3 teams, and ~15-20 seconds for 5 teams depending upon the data.</li> </ul>

Module	Volume Supported and Test Benchmark
	<ul style="list-style-type: none"> <li>Download of reports should start within ~5 seconds and the job will complete within ~30 minutes depending on data.</li> </ul>
<b>Long running Actions/Tasks</b>	<ul style="list-style-type: none"> <li>Metric computation jobs for customer custom fields are supported for 3M customers and take around ~12 minutes for processing.</li> <li>ZIP/Geo alignment changes lead to re-calculation of metrics and are supported for 250K zips. This is observed to take around ~90 seconds.</li> <li>Guardrails evaluation job support is up to 5K alignment changes and takes ~8 minutes for completion.</li> </ul>

	<p><b>Note:</b> These benchmarks are for Zaidyn Field Deployment R9 release. These numbers are valid for RDS size 8x large</p>
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## Maximum Number of Entities Supported in an Alignment Operation from UI

The following table provides the maximum number of entities supported during alignment operations from the UI across various scenarios. Additionally, the table highlights the proposed entity counts for **Customer** and **ZIP code** (Geo Code) alignments.

Alignment Type Supported in Team	Alignment Change Supported	Selection & View Details in Single Operation
<b>Geo Alignments Only</b>	7,000	10,000 ZIPs
<b>Geo + Customer</b>	1000 ZIPs and 2000 Customers	10,000 Customers and 10,000 ZIPs
<b>Customer</b>	7000 (18000 including affiliations)	10,000 Customers

## Other Important Data Points

Sr No	Details
1	Shared alignment - <ul style="list-style-type: none"> <li>• Max sharing of a customer/zip on workunit: 11</li> <li>• Max zip alignments in a team : 82k (each zip shared with 2 workunits)</li> </ul>
2	Max number of children workunits for a parent workunit: 32
3	No of vacant workunits/positions: <ul style="list-style-type: none"> <li>• Non-DR: max no of workunits: 4k, max notifications: 25k</li> <li>• DR: max no of positions: 10k, max notifications 25k</li> </ul>

## Data Shape Performance Variance

Performance for any application is highly dependent on both the Data Shape, which refers to the load on the system, and the specific actions being measured. These actions can be either human actions or system-to-system interactions. The data in this section represents the data for ZAIDYN Field Deployment. There are three data shape input parameters and ten different user actions that have been measured.

Each application is unique in terms of its Data Shape and actions it performs, which consequently causes variations in response times.

## Data Shape Details

The data shapes included in this section are based on the analysis of multiple real datasets. These datasets are voluminous and diverse, covering most of the complexities required. We plan to revisit these data shapes for any further refinements as needed in the future. The table below references all the Data Parameters that comprise the ZAIDYN Field Deployment Dataset.

Entities	Tested Benchmark	Data Shape 1	Data Shape 2
<b>Customer</b>	9,000,000	4,800,000	26,479
<b>Customer Address</b>	15,000,000	9,000,000	NA
<b>Teams</b>	750	217	311
<b>GEOs (Zips, Bricks, Macro bricks etc.)</b>	140,000	138,601	42,000
<b>Work Unit</b>	22,500	10,440	8,338
<b>Employee</b>	50,000	34,772	22,000
<b>Employee Address</b>	50,000	NA	NA
<b>Hierarchy Levels</b>	2,000	600	477
<b>Role</b>	1,000	933	759
<b>Employee Assignment</b>	30,000	3,429	24,000
<b>Product (NDC)</b>	40,000	35,250	100
<b>Level to Role Mapping</b>	12,500	2,500	1,000
<b>Role to Product Mapping</b>	18,750	12,000	3,000
<b>Product Assignment</b>	375,000	280,000	13,000
<b>Customer/Alignment Entity Types</b>	25	2	5
<b>Customer Attribute</b>	300	14	50
<b>Zip Attribute</b>	75	NA	NA
<b>Customer-Team</b>	15	6	NA
<b>Team Attribute</b>	15	NA	2
<b>Work Unit Attribute</b>	15	1	8
<b>Employee Attribute</b>	80	11	40
<b>Role Attribute</b>	10	3	NA

Entities	Tested Benchmark	Data Shape 1	Data Shape 2
Role Category Attribute	15	NA	NA
Employee Assignment Attribute	15	NA	7
Product Attribute	15	1	NA
Product assignment Attribute	15	NA	NA
Calculated Attribute formula for ZIPs	10	NA	NA
Calculated Attributes formula for Work Units	10	NA	NA
Calculated Index formula for Work Units	10	NA	NA
Call Plan	5	NA	NA
Call Activity	5	NA	NA
Explicit alignment from external	5	NA	NA
Affiliation Group Configuration	5	NA	NA
Customer Alignment	67,000,000	33,000,000	NA
Max Customer Alignment in a team	5,000,000	2,500,000	NA
Relationship Type Changes	50	1	NA
Affiliation Group	30,000,000	6,000,000	NA
Affiliation Network	30,000,000	6,000,000	NA
Country	150	NA	NA
Business Unit	10	NA	NA
Teams/Country	300	NA	NA
Geo Alignment	9,000,000	1,500,000	9,000,000
Max geo Alignment in a team	41,800	41,800	41,800
Alignment Attribute	10	10	NA

**Note:**

- Zip marker configuration for Data shape1 is supported at zoom level 9 & for data shape 2 its at zoom level 7
- Data shape 2 is the max tested data set for marker configuration at zoom level 7, any parameters crossing in data shape 2 can result in performance challenges.

## User Actions and Performance Values

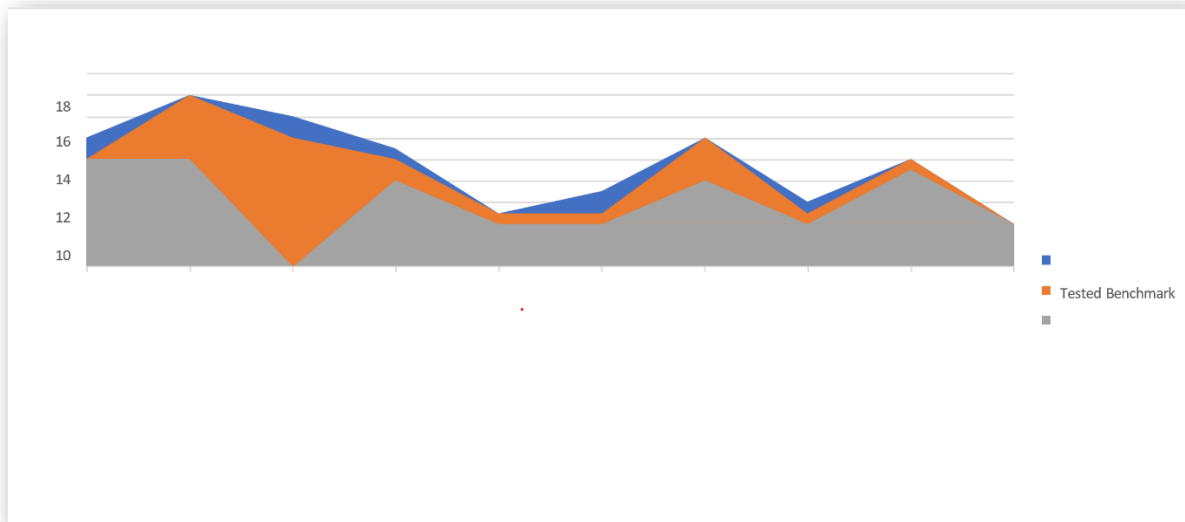
Transaction Time in Seconds			
Transaction	Tested Benchmark	Data Shape 1	Data Shape 2
Initial Map Load (without markers)	15	15	10
Single Alignment Change - Geo	18	18	10
Single Alignment Change -Customer	14	14	NA
Add Primary/Secondary assignment	15	15	8
Roster search and filter	5	5	4
Multiselect (~100 changes)	7	5	4
Preview Request (~100 changes)	20	20	8
View employee assignment on roster page	8	8	4
Create Geo Alignment Summary Report (1 team - 41k records)	10	10	9
Rule Creation	6	6	6



**Note:** The Benchmarked standard timings listed are an outcome of the application, configuration, and data. Timings listed should be considered a benchmark and not a standard. The standard SLA of 5 sec is for simple user actions. However, for a complex action such as Map Load, it takes longer than the SLA limit. The response times mentioned in this document are baselined and evolved over time and are observed to be consistent with the Z Aidyn SLA.

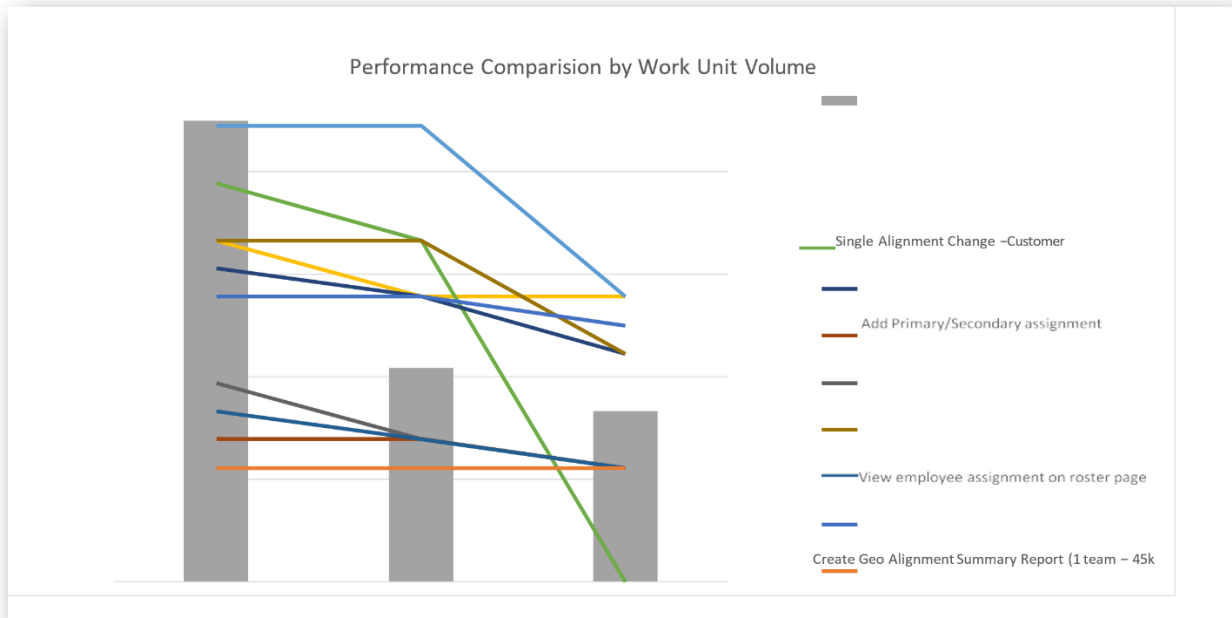
With every release, we ensure that timings are better than or in line with the previous Z Aidyn Field Deployment release versions.

Transaction time comparison for different UI actions with different Data shape (Performance Comparison in secs) compared with the Tested benchmark (Graph 1)



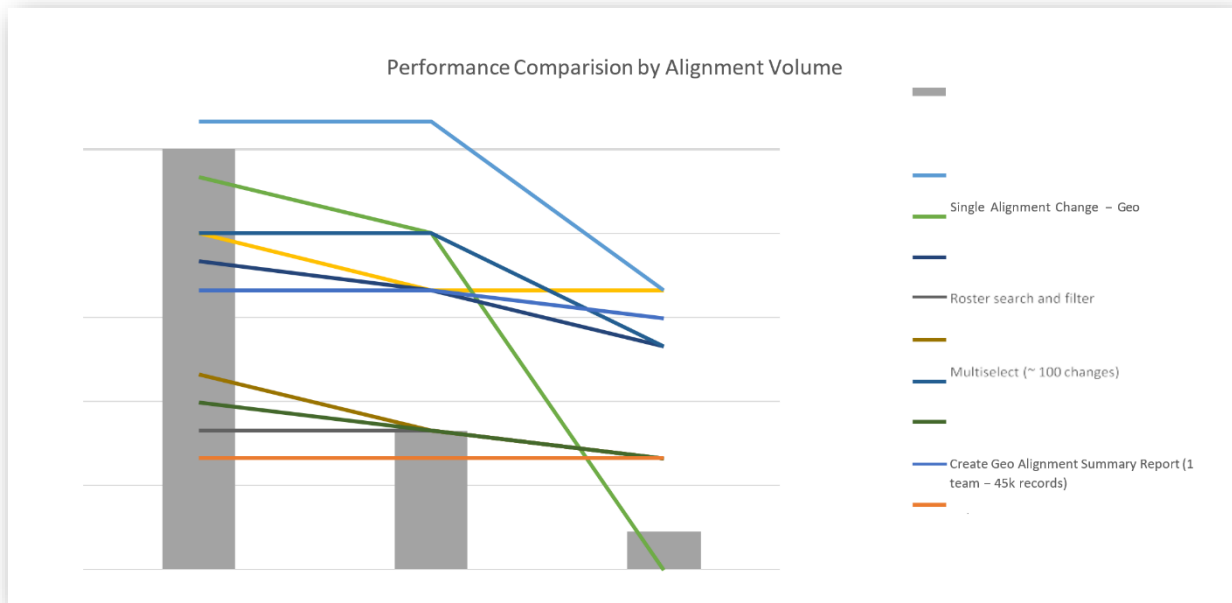
Graph 1: Performance Comparison in Secs

Transaction time comparison for different UI actions by Work Unit Volume (Graph 2)



Graph 2: Performance Comparison by Work Unit Volume

Transaction time comparison for different UI actions by Alignment Volume (Graph 3)



Graph 3: Performance Comparison by Alignment Volume



## FD Configuration Information

Configuration	Description	Impact
<b>EnableRetainingMirroredAlignments</b>	This configuration allows user to control removal of existing mirrored alignment within driven team during rule refresh execution for driven team.	If set to TRUE, mirrored Alignments will not be dropped during Alignment Refresh for a Team.
<b>SkipAlignmentDropReasonInsertionInRefreshLog</b>	Disables the insertion of drop reasons in the refresh log for alignment skips, reducing log clutter and improving performance.	If set to TRUE, insertion of drop reasons of Customer-Alignments due to Workunit Rules will be skipped during Alignment Refresh.
<b>“supportedExportFilters”: effectivestartdate, effectiveenddate, lastupdateddate</b>	This configuration specifies the supported export filters: for more targeted data extraction.	Supported Filters: effectivestartdate, effectiveenddate, lastupdateddate
<b>EnableUnassignedOnly</b>	This configuration controls the visibility of the 'Unassigned' toggle in Roster Assignment while searching employees for Assignment on WUs.	Default value is false. This is an Instance-level configuration to Enable/Disable the 'Unassigned' toggle in Roster Assignment.
<b>MultipleAssignmentsAllowed</b>	This configuration allows users to enable multiple assignments	Default value is false. If set to true, multiple assignments will be allowed. <b>(Note:</b> Once DR is enabled you cannot revert this flag back to false)
<b>EnableDefaultLocationEntitiesInMapReport</b>	This helps to configure whether default location entities are displayed in the Map Report	This parameter indicates whether we need to include customer and zip markers at default location while calculating the bounding box in Map report UI and download.
<b>ExportAffiliationNetworkDelta</b>	This configuration enables the export of changes in the Affiliation Network for tracking updates. User can define the Value e.g. 100,000	In this case to export 1 million Affiliation Network records is divided into batch tasks of 100k records each and dumped into a temporary table.

Configuration	Description	Impact
<b>AlignmentSourcesToRestore</b>	This Configuration supports force eligibility of customers by bypassing business rules. Users can Specify the alignments with respective alignment sources that needs to be retained within the system through “by- passing” the G&T and Business rule.	Alignment Source values that are supported: ExplicitFromExternalSource, Explicit, CallPlan, CallActivity.
<b>LassoSelectionZoomLevel {"zipMarkers": &lt;desired zoom level&gt;}</b>	This configuration supports enabling Zip markers are desired zoom level invalidateEmployeeRecords	Configuration for controlling zoom level for Lasso Selection: {"zipMarkers": 7} Product Recommendation Zoom level 9
<b>RestrictMirroredAlignments RuleRefresh</b>	This Configuration supports in controlling the generation of mirrored Alignment within Driven Team.	<ul style="list-style-type: none"> <li>• <b>Default</b> False.</li> <li>• <b>If set to True:</b> Mirrored Alignments should not be generated in the driven team, when Alignment Refresh for driving team is triggered in the system.</li> <li>• <b>If set to False:</b> Mirrored Alignment generation in the driven team will be generated as per standard behavior/Implementation.</li> </ul>
<b>invalidateEmployeeRecords</b>	This Configuration allows user to update hire date of employee when overlapping Employee Assignments or Leaves are present within system.	<ul style="list-style-type: none"> <li>• <b>Default:</b> False.</li> <li>• This flag, when set to True will ensure that in an event where user tries to postpone the hire date of an employee all the conflicting assignments as well as leaves (i.e. leave/assignment start date &lt; proposed new hire date) are invalidated and the system updates the new hire date for the employee.</li> </ul>

Configuration	Description	Impact
		<ul style="list-style-type: none"> <li>• If set to False, all the existing validations will continue to exist in case of conflicting assignments/leaves.</li> </ul>
<b>Calendarstartyear</b>	<p>This configuration allows setting the value of the start year which is displayed within calendar control across all pages.</p>	<ul style="list-style-type: none"> <li>• <b>Default:</b> 2001</li> <li>• If set to a valid year (YYYY format): The calendar control starts from the specified year across all navigation touchpoints.</li> <li>• Users can access years starting from this configuration.</li> <li>• If not set then the starting year shown within the dropdown value is set to 2001 as a default.</li> </ul>
<b>homePageUrl</b>	<p>This configuration enables setting a dedicated ZAS default landing page for users when users click on the ZAIDYN logo within the ZFD application.</p>	<ul style="list-style-type: none"> <li>• <b>Default:</b> Null</li> <li>• <b>If the URL is configured:</b> Clicking the ZAIDYN logo redirects users to the specified URL.</li> <li>• <b>If not configured:</b> No redirection occurs, and the behavior follows the standard implementation without a defined default landing screen.</li> </ul>
<b>RestrictedScenarioAccess</b>	<p>This configuration enables or restricts scenario visibility and functionality for admin users in the ZFD application.</p>	<ul style="list-style-type: none"> <li>• <b>Default:</b> False.</li> <li>• <b>If TRUE:</b> Scenario visibility and functionality will be restricted to the creator admin. Other admin users will not be able to view or take any action on the restricted scenarios.</li> </ul>

Configuration	Description	Impact
		<ul style="list-style-type: none"> <li>• <b>If FALSE:</b> There will be no restrictions on scenario visibility or functionality. All admin users can view and interact with scenarios as per the current implementation.</li> </ul>
<b>Employee Base Fields Edit via Browser</b>	Enables editing of key employee base details including name, category, hire date, termination date, and termination reason via the browser.	<ul style="list-style-type: none"> <li>• <b>Default:</b> False.</li> <li>• <b>If True:</b> This will allow editing of key employee base information including Name, Category, Hire date, termination date &amp; termination reason via UI.</li> </ul>
<b>Employee Primary Address Edit via Browser</b>	Allows users to configure if the primary address of employees will be editable through the browser.	<p><b>Default:</b> False.</p> <p><b>If True:</b> This will allow editing of primary address of employees via UI.</p>
<b>Default Access</b>	Sets the default access level assigned to roles within the system.	Default: View
<b>Default Customer Longitude</b>	Specifies the default longitude assigned to customer locations.	Default: -87.68233937
<b>Default Customer Latitude</b>	Specifies the default latitude assigned to customer locations.	Default: 42.04591681
<b>Default Zip Longitude</b>	Specifies the default longitude for ZIP codes used in the system.	Default: -87.68233937
<b>Default Zip Latitude</b>	Specifies the default latitude for ZIP codes used in the system.	Default: 42.04591681
<b>Refresh Mailing Object</b>	Email is triggered to list of users when refresh is initiated	
<b>Apply System Date</b>	Allows users to choose between using the current system date or the last selected date for processing.	<b>Default:</b> False. If True: User will be logged in current system date whenever user logs in

Configuration	Description	Impact
<b>EnableOverrideImplicitAlignments</b>	Allows users to control whether implicit alignments can be overridden by explicit alignments via bulk upload.	<ul style="list-style-type: none"> <li>• <b>Default:</b> False</li> <li>• <b>If True:</b> Users can override implicit alignments with explicit alignments through bulk upload.</li> <li>• Implicit records will be updated to explicit if the same record is uploaded or edited.</li> <li>• <b>If False:</b> Current behavior remains unchanged.</li> <li>• If a record already exists as implicit, it will be ignored during bulk upload.</li> </ul>
<b>KPI_Filter_Enabled</b>	Allows user to view KPI based filtering on Alignment Map and table view for a team.	<ul style="list-style-type: none"> <li>• <b>Default:</b> True</li> <li>• <b>If True:</b> user will be able to view metrics-based filtering on Alignment map and table view for a team.</li> <li>• <b>If false:</b> user will not be able to view metrics based filtering on Alignment map and table view for a team.</li> </ul>
<b>EnableFlexibleHeirarchy</b>	Enables user to support flexible hierarchy for all the teams on the instance.	<ul style="list-style-type: none"> <li>• <b>Default:</b> False</li> <li>• <b>If True:</b> Instance will support flexible hierarchy for all teams on the instance.</li> <li>• <b>If False:</b> Instance will not Support flexible hierarchy for any team on the instance</li> <li>• <b>Note:</b> This is one time config, once enabled cannot be disabled.</li> </ul>


Configuration	Description	Impact
<b>Report Download Format</b>	Enables users to set Default Report download format.	<ul style="list-style-type: none"> <li>• <b>Default:</b> CSV.</li> <li>• <b>Note:</b> User can select either CSV or txt format</li> </ul>
<b>Blacklist report for a Role</b>	Provides Functionality to hide specific reports from a particular role in the system.	<p>Reports will be hidden for Role user defined in this configuration.</p> <p><b>Note:</b> To blacklist any report for a role, please submit a request to the ZS support team.</p>
<b>"LassoSelectionZoomLevel"</b> : { "employeeMarkers": (Desired level) },	Enable users to configure zoom levels for showing Employee markers at different zoom levels.	<ul style="list-style-type: none"> <li>• For controlling zoom level for showing Employee markers at different zoom levels, please introduce below config at tenant level.</li> <li>• <b>Default:</b> 7</li> <li>• Users can add value between 5 to 15 based on requirement.</li> </ul>
<b>EnableDerivedCustomerMarkersOnMap</b>	Enable visibility of Derived customer markers by default on Alignment map.	<ul style="list-style-type: none"> <li>• <b>Default:</b> - False</li> <li>• <b>If True:</b> User can see derived customer markers by default on Alignment map &amp; Split map</li> <li>• <b>If False:</b> user won't be able to see derived customers on Alignment map by default, however users can still choose to apply filter using Global filter to view Derived customers.</li> </ul>
<b>defaultLoginDateNextQuarter</b>	Allows users to view the first date of next quarter upon login.	<ul style="list-style-type: none"> <li>• <b>Default:</b> False</li> <li>• When set to True: All users accessing the system will see the first date of the upcoming</li> </ul>

Configuration	Description	Impact
		<p>quarter pre-selected in the calendar. However, users can modify this date as needed.</p> <ul style="list-style-type: none"> <li>• <b>Note:</b> This configuration overrides the "Apply System Date" config.</li> <li>• If defaultLoginDateNextQuarter is set to True, the system will default to the first date of the next quarter at login, regardless of the value in "Apply System Date" config.</li> <li>• If defaultLoginDateNextQuarter is set to False, the system will follow the value defined in "Apply System Date" config.</li> </ul>
<b>Mapsnapshotdownloadpixel ratio</b>	This configuration helps users to download high resolution image of map Snapshot.	<ul style="list-style-type: none"> <li>• <b>Default:</b> 3</li> <li>• <b>Allowed Values:</b> 1, 2, or 3 (with 1 indicating the smallest pixel size and 3 the largest)</li> </ul>
<b>AlignmentSourceBoundingBoxConfig</b>	To control which alignment sources are considered in the bounding box calculation for work units zoom-to-select functionality.	<ul style="list-style-type: none"> <li>• <b>Default:</b> Call Plan, Call Activity, External, Explicit.</li> <li>• <b>Allowed Values:</b> Call Plan, Call Activity, External, Explicit, Affiliation, Geo Based and Mirror.</li> </ul>
<b>EnableFieldEventTracking</b>	To control the usage of field events and corresponding assignment validation for employees.	<ul style="list-style-type: none"> <li>• <b>Default:</b> False</li> <li>• <b>Allowed Values:</b> FieldStart, FieldEnd</li> </ul>

Configuration	Description	Impact
		<ul style="list-style-type: none"> <li>• <b>Note:</b> Once enabled, this configuration cannot be reverted (disabled).</li> </ul>
<b>WorkloadCenterAttributeZoomLevel</b>	To control visibility of workload center markers on Alignment map and map reports.	<p><b>Default:</b> 7</p> <p>User can add value between 5 to 15 based on requirement.</p>
<b>EnableCustomerAlignmentContext</b>	To control management of multiple versions of customer Alignments in the system.	<ul style="list-style-type: none"> <li>• <b>Default:</b> False</li> <li>• <b>If True:</b> - user will be able to manage context LOVs in the system for Rules, Guardrails, AGC, bulk imports and exports (for Customer Alignment and Product Level Alignments)</li> </ul>
<b>EnableSmartAlignmentSuggestions</b>	To enable smart realignment feature on the instance.	<ul style="list-style-type: none"> <li>• <b>Default:</b> False</li> <li>• <b>If True:</b> User will have smart realignment suggestions.</li> </ul>
<b>RetainCustomerAlignmentWithoutProduct</b>	To enable customer alignments without mandatory products when team & customer type supports PLA.	<ul style="list-style-type: none"> <li>• <b>Default:</b> False</li> <li>• <b>If True:</b> system will support customer Alignment without PLA</li> </ul>
<b>IncludeDefaultForWorkloadCenterCalculation</b>	To include default values in workload center calculation when explicit inputs are not available.	<ul style="list-style-type: none"> <li>• <b>Default:-</b> True</li> <li>• <b>If True:</b> - The workload calculation should Include zips/customers having lat/long based on the “Default Values” stored in the system.</li> <li>• <b>If False:</b> - The workload calculation should exclude all the zips/customers as per alignment to calculate the workload center for a workunit</li> </ul>

Configuration	Description	Impact
		<ul style="list-style-type: none"> <li>• <b>Note:</b> - While changing status of flag, cache should be invalidated.</li> </ul>
<b>defaultSelectedMetricsEmployeeDashboard</b>		<ul style="list-style-type: none"> <li>• DB level config</li> <li>• Admins can configure a default set of up to 6 employee metrics using the configuration.</li> <li>• These metrics are shown as default columns on the Admin Employee Listing page and are pre-selected in the Employee Metric selection panel.</li> <li>• Users can change the visible metrics via the panel, and their latest selection is retained while navigating within Alignment when returning to the Employee Listing page in the same session.</li> </ul>
<b>IncludeDefaultForWorkloadCenterCalculation</b>		<ul style="list-style-type: none"> <li>• <b>Default:</b> - True</li> <li>• <b>If True:</b> - The workload calculation should Include zips/customers having lat/long based on the "Default Values" stored in the system.</li> <li>• <b>If False:</b> - The workload calculation should exclude all the zips/customers as per alignment to calculate the workload center for a workunit</li> </ul>
<b>IncludeDefaultForWorkloadCenterCalculation</b>		<ul style="list-style-type: none"> <li>• <b>Default:</b> - True</li> <li>• <b>If True:</b> - The workload calculation should Include zips/customers having lat/long based on the "Default</li> </ul>

Configuration	Description	Impact
		<p>Values” stored in the system.</p> <ul style="list-style-type: none"> <li>• <b>If False:</b> - The workload calculation should exclude all the zips/customers as per alignment to calculate the workload center for a workunit</li> </ul>
<b>AddBOMToCSVReports</b>		<ul style="list-style-type: none"> <li>• DB level Config</li> <li>• <b>Default value:</b> - False</li> <li>• <b>If True:-</b> the csv reports now downloaded will be UTF8 BOM and should open properly in excel without performing any extra steps.</li> <li>• <b>Note:-</b> This config is specifically for Japanese Instance</li> </ul>
<b>maxAlignmentChangeOnWorkunitCollapse = 25</b>		<ul style="list-style-type: none"> <li>• DB level Config</li> <li>• <b>Default value:</b> - 25</li> <li>• <b>Note:</b> This configuration added to show Unique set of work Unit suggestion for SVM</li> </ul>

	<p><b>Note:</b> Few of the above configurations can be managed via dedicated UI. For any assistance, please contact the ZS support team.</p>
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