



ZAIDYN™ Field Planning - Call Plan API Guide

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1560 Sherman Avenue

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www.zs.com

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About the Guide

This document provides technical guidance for integrating and using core APIs required for data import, export, job tracking, and summary validation in the ZAIDYN™ Call Plan module. Each section details the structure, expected inputs/outputs, and the object contracts relevant to Call Plan workflows.

Target Audience

This guide is intended for system configurators and administrators who are responsible for integrating with ZAIDYN Call Plan.

End-to-End Headless Flow

This section describes the complete sequence of API-driven steps required to generate a call plan without using the user interface. The following APIs must be executed in the listed order:

1. **Import API** – Import the base objects required for Field Deployment and Call Planning.
2. **Call Plan Base Bulk Import API** – Load foundational call plan data in bulk to set up the structure.
3. **Call Plan APIs** – Configure detailed call plan components, including:
 - **Call Plan Customer**
 - **Call Plan Product Lineup - End-to-End Flow**
 - **Call Plan Channel Activity**
 - **Call Plan Aggregated Segment**
4. **Publish Call Plan API** – Trigger the publishing process via API without using the application user interface.

Key API Sections

This section outlines the key APIs that are covered in this document.

Section		Description	
Import API		Enables ingestion or update of Call Planning data using structured object files.	
Job Status API		Polls the status of import requests using JobId.	
Import Summary and Validations		Provides post-import results including success counts, errors, and warnings.	
Publish API		Enables the Publish call plan functionality using API.	
Response Body: application/JSON		Allow users to export Call Planning data	
55599621-a98e-11f0-b34c-d30785172f84			
Response Parameters			
Name	Type	Sample Value	Description

UUID	Text	2025-03-27 07:05:33.4532	Identifier that uniquely identifies the asynchronous job that was triggered to publish the call plan. Users can use this ID to track the status of the job.
Export API			
Error! Not a valid result for table.			Returns the status and output file path for a specific export job.



Notes:

1. All APIs must be authenticated and invoked using approved integration credentials. Field names and object structures are case-sensitive and must align with system expectations to avoid processing errors.
2. Always ensure your requests include appropriate headers and tokens as required. Unauthorized access will result in standard **401** or **403** errors.

Import API

The Import API serves as the entry point for ingesting foundational data required for Call Plan generation. Users can use this API to ingest new data or update existing data. This section provides a concise summary of the endpoint specifications, supported request formats, and the key objects handled by the API.

Type: POST

URL: {baseUrl}/{instance}/file/ImportRequest

Endpoint: /file/ImportRequest

Request Body: application/JSON

```
{
  "FilePath": "s3://bucket/path/file.zip",
  "EffectiveDate": "2025-01-01"
}
```

Request Parameters

Name	Type	Required	Sample Value	Description
FilePath	Text (string)	Yes	s3://bucket/path/file.zip	Full path to the import file. Typically an S3 location or other cloud storage URI.
EffectiveDate	Text (YYYY-MM-DD)	Optional	2025-01-01	Optional effective date to be applied to imported records, if supported.

Response Body: application/JSON

```
{
  "JobId": "abc123",
  "RequestId": "789"
}
```

Response Parameters

Name	Type	Returned	Sample Value	Description
JobId	Text (string)	Yes	abc123	Unique identifier for the asynchronous import job. Use this ID with the Job Status API to track progress.
RequestId	Text/Integer	Yes	789	Identifier used to retrieve the Import Summary and Validation Results for the submitted job.

Input Data

The following table outlines the supported data objects, their purpose, and the types of operations allowed during import.

Object	Description	Load Type
Customer Type Changes	Represents types of customers	Upsert and Delete
Customer Changes	Represents the customers	Upsert and Delete
Customer Address Changes	Represents the customer's address	Upsert and Delete
Country Changes	Represents the country	Upsert and Delete
Product Changes	Represents the customers	Upsert and Delete
Level Changes	Represents the Levels	Upsert and Delete
Team Changes	Represents the Team	Upsert and Delete
Role Category Changes	Represents the Role Category	Upsert and Delete
Role Changes	Represents the Roles	Upsert and Delete
Employee Changes	Represents the Employee	Upsert and Delete
Work Unit Changes	Represents the Work units	Upsert and Delete

Object	Description	Load Type
Team to Customer Type Changes	Mapping of Team to Customer types	Upsert and Delete
Level to Role Changes	Mapping of Level to role	Upsert and Delete
Level to Country Changes	Mapping of Level to Country	Upsert and Delete
Role Product Changes	Mapping of Role to Product	Upsert and Delete
Employee Assignment Changes	Mapping of Work unit to Employee	Upsert and Delete
Product Assignment Changes	Mapping of Work unit to Products	Upsert and Delete
Position Changes	Represents the Position	Upsert and Delete
Customer Alignment Changes	Represents Customer Alignment data	Upsert and Delete
Work Unit Relationship Changes	Represents Work unit and its relationship with parent within a Team	Upsert and Delete
Custom field List of Value	Custom field value for an object	Upsert and Delete
Customer Custom field/Metric	Custom field at Customer level	Upsert and Delete
Customer Team Custom field/Metric	Custom field at Customer-Team level	Upsert and Delete
Customer Product Custom field/Metric	Custom field at Customer-Product level	Upsert and Delete
Customer Address Custom field/Metric	Custom field at Customer-address level	Upsert and Delete
Time Period	Mapping of business units to products.	Upsert and Delete
Channel	Represents the Channel data	Upsert and Delete

Object	Description	Load Type
Reason Code	Represents the Reason Code data	Upsert and Delete
Reason Code Locale	Represents Reason Code Locale data	Upsert and Delete
Call Planning Team Setting	Represents the Team's data for call planning	Upsert and Delete
Team to Channel	Represents the Team to Channel data	Upsert and Delete
Team to Reason Code	Represents the Team to Reason Code data	Upsert and Delete
Team Default Capacity	Represents the Default Capacity at Team	Upsert and Delete
Work Unit Override Capacity	Represents the Overrides at Work unit	Upsert and Delete
Team to Product	Represents the Team to Product data	Upsert and Delete
Team to Customer Type Call Planning	Represents the Team to Customer type data for Call Planning	Upsert and Delete
Aggregated Segment List of Values	Represents the value of Aggregated Segment at Team	Upsert and Delete
Call Plan Base	Represents the Call Plan scenario data	Upsert and Delete

**Notes:**

- **Upsert:** Inserts new records or updates existing ones based on unique identifiers.
- **Delete:** Removes records from the system based on provided identifiers.

Base Object Details

This section provides detailed information about all the supported bulk import objects and their respective fields.

Customer Type Changes

This object defines unique identifiers and labels for different customer types (e.g., ACC for Account).

Field	Type	Required	Default	Sample Value	Description
CustomerTypeId	Text	Yes (Primary)	NA	ACC	Unique identifier of the customer type
CustomerTypeName	Text	Yes	NA	Account	Label or name of the customer type
RemoveCustomerType	Boolean	No (Optional)	FALSE	FALSE	Remove the customer type

Customer Changes

This object defines the key fields for managing a customer record.

Field	Type	Required	Default	Sample Value	Description
CustomerId	Text	Yes (Primary)	NA	A00003G3	Unique identifier of the customer
CustomerName	Text	Yes	NA	Michelle Bauer	Name of the customer
CustomerTypeId	Text	Yes	NA	ACC	Corresponding customer type identifier
RemoveCustomer	Boolean	No (Optional)	FALSE	FALSE	Remove the customer

Customer Address

This object represents detailed address information associated with a customer.

Field	Type	Required	Default	Sample Value	Description
CustomerId	Text	Yes (Primary Key)	N/A	A00003G3	Unique identifier of the customer to whom the address belongs.
CustomerAddressId	Text	Yes (Primary Key)	N/A	123 North Terrace	Unique identifier for the specific customer address.
CustomerAddress1	Text	Yes	null	Suite 456	Primary address line (e.g., street, building, suite).
CustomerAddress2	Text	No (Optional)	null	Suite 456	Secondary address line (e.g., apartment, floor).
CustomerCity	Text	Yes	N/A	Evanston	City associated with the customer address.
CustomerState	Text	Yes	N/A	IL	State or province for the customer address.
CustomerCountry	Text	Yes	N/A	USA	Country for the customer address.
CustomerCounty	Text	No (Optional)	null	Fairfax County	County for the customer address.
PrimaryAddress	Boolean	Yes	FALSE	TRUE	Indicates whether this is the customer's primary address.
CustomerAddressType	Text	Yes	N/A	Work	Type of address (e.g., Work, Home, Billing).
CustomerGeoCode	Text	Yes	N/A	78901	Geocode or ZIP/postal code for the address.
RemoveCustomerAddress	Boolean	No (Optional)	FALSE	FALSE	Flag to indicate removal of the address record.
CustomerLatitude	Numeric	No (Optional)	N/A	42.0502791	Latitude coordinate for geolocation.
CustomerLongitude	Numeric	No (Optional)	N/A	-87.6821998	Longitude coordinate for geolocation.
EligibleForAlignment	Boolean	No (Optional)	FALSE	FALSE	Indicates if the address can be used for ZIP-based alignment logic.



Note: A customer address with a valid country name is required for instances where call planning is enabled.

Country Changes

Field	Type	Required	Default	Sample Value	Description
CountryId	Text	Yes	NA	FR	Defines the unique identifier of the Country being created.
CountryName	Text	Yes	NA	France	Name of the country.
RemoveCountry	Boolean	No (Optional)	FALSE	FALSE	Remove the country.



Note: Country configuration is mandatory for instances where call planning is enabled.

Product Changes

Field	Type	Required	Default	SampleValue	Description
ProductId	Text	Yes (Primary)	NA	AGE 1	Defines the unique identifier of the product to be added to the system.
ProductName	Text	Yes	NA	Agen	Name of the product to be added to the system.
RemoveProduct	Boolean	Optional	FALSE	FALSE	Remove the product from the system.

Level Changes

Field	Type	Required	Default	Sample Value	Description
LevelId	Text	Yes (Primary)	NA	1	Defines the unique identifier of the Work Unit level to be added.
LevelName	Text	Yes	NA	PCP2	The name of the Work Unit level to be added.
LevelParentId	Text	Optional	Null	2	Defines the unique identifier of the parent Work Unit level to be added.


Field	Type	Required	Default	Sample Value	Description
LevelType	Text	Yes		Other/Country/B usiness Unit	Defines the type of level change.
RemoveLevel	Boolea n	Optional	FALSE	FALSE	Remove the Work Unit level from the system.

Team Changes

Field	Type	Required	Default	Sample Value	Description
TeamId	Text	Yes (Primary)	N/A	TT1	Unique identifier for the team being added to the system.
TeamName	Text	Yes	N/A	Primary Care	Name of the team to be created in the system.
LowestLevelId	Text	Optional	Null/Empty	1	Specifies the starting Level ID for mapping levels to the team.
TeamEnableSharedAlignment	Boolean	Optional	FALSE	FALSE	Enables the creation of shared alignments within the team.
TeamEnableAlignmentWeightSumNotEqualTo100	Boolean	Optional	FALSE	FALSE	Allows the total weight of shared alignments to be less than or greater than 100.
AllowDeltaOperationviaUIBRMS scenarioPublish *	Boolean	Optional	FALSE	FALSE	Allow users to upload the records as the delta addition to the existing records via UI, BRM and Scenario Publish
AllowCustomerBasedAlignment	Boolean	Optional	TRUE	FALSE	Indicates whether customer-based alignments are supported for the team.
AllowAlignmentAttribute	Boolean	Optional	FALSE	TRUE	Enables support for alignment attributes within the team. Note: This is a one-time setting. Once set to TRUE, it cannot

Field	Type	Required	Default	Sample Value	Description
					be reverted to FALSE.
AllowGeoBasedAlignment *	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 GeoType Id).
GeoType Id *	Text	Required if AllowGeoBasedAlignment flag is True	ZIP	ZIP1	Id of the type of Geo being created. Once the user modified this value to 'True,' it cannot be reverted to 'False'
AllowProductLevelAlignment *	Boolean	Optional	False	True	Allows users to define if product level alignment is supported in the team. Note: 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'
TeamEnableProductAllocationWeightSumNotEqualTo100 *	Boolean	Optional	False	False	Allows users to enable when product allocation weight sum not equal to 100
AllowAlignmentMapView *	Boolean	Optional	True	False	Allows users to define if Alignment Map

Field	Type	Required	Default	Sample Value	Description
					view is supported in the team
AllowAlignmentTableView *	Boolean	Optional	True	True	Allows users to define if Alignment table view is supported in the team
SetAlignmentMapDefaultView *	Boolean	Optional	TRUE	False	Allows users to define default view for the alignment planning page.
AffiliationEnabled *	Boolean	Optional	FALSE	FALSE	Allows user to define if this team supports Affiliation.
ReferenceTeamID *	Text	Optional	FALSE	FALSE	This column Will be consumed when tenant configuration EnableFlexibleHierarchy= True
ReferenceLevelId *	Text	Optional	FALSE	FALSE	This will be consumed when EnableFlexibleHierarchy= True
RemoveTeam	Boolean	Optional	FALSE	FALSE	Flags the team for removal from the system.

	<p>Note: If you are using an integrated instance with Field Deployment, fields marked with an asterisk (*) are mandatory, for a standalone instance marked fields shouldn't be provided.</p>
---	--

Role Category

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

Role Changes

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

Employee Changes

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

Work Unit Changes

Field	Type	Required	Default	Sample Value	Description
WorkUnitId	Text	Yes (Primary)	NA	9A99999	Defines the unique identifier of the Work Unit to be added in the system.
WorkUnitName	Text	Yes	NA	PCP2	Name of the Work Unit to be added in the system.
WorkUnitParentId	Text	Yes	NA	Unassigned	Defines the unique identifier of the parent

Field	Type	Required	Default	Sample Value	Description
					Work Unit to be added in the system.
LevelId	Text	Yes	NA	11	Defines the unique identifier of the Work Unit level to be added.
EnableExplicitSharing	Boolean		FALSE	NA	Allows users to add a Work Unit to a Level with no connections to any team.
RemoveWorkUnit	Boolean	Optional	FALSE	FALSE	Remove the Work Unit from the system.
WorkUnitType	Text	Yes	NA	Field / Home Office	Type of Work Unit to be added in the system.
RoleId	Text	Yes	NA	5	Defines the unique identifier of the role to be assigned in the Work Unit.
CountryId	Text	Optional (required only if LevelId is of type Country)	NA	NA	Defines the unique identifier of the country.
BusinessUnitId	Text	Optional (required only if LevelId is of type BusinessUnit)	NA	NA	Defines the unique identifier of the business unit.

Team to Customer Type Changes

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



Note: If you are using an integrated instance with **Field Deployment**, fields marked with an asterisk (*) are mandatory, for a standalone instance marked fields shouldn't be provided.

Level to Role Changes

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

Level to Country Changes

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



Note: Country setup for a Team is mandatory for instances where call planning is enabled.

Role Product Changes

Field	Type	Required	Default	Sample Value	Description
ProductId	Text	Yes	NA	PCP2	Defines the unique identifier of the product to be added in the system
RoleId	Text	Yes	NA	Primary Care 2	Defines the unique identifier of the role to be added in the system.
DefaultWeight	Decimal	Yes	NA	100.00	Stores information about the Role to Product's weight percent
Default	Boolean	Yes	NA	TRUE	Allows user to define if the Product will be used by default for this Role while defining the Assignment.
RemoveMapping	Boolean	Optional	FALSE	FALSE	Remove the role product mapping from the system.

Employee Assignment Changes

Field	Type	Required	Default	Sample Value	Description
EmployeeAssignmentId	Text	Yes (Primary)	NA	06001A	Defines the unique identifier of the assignment to be added and assigned to the Employee in the system.
WorkUnitId	Text	Yes	NA	1A0301C	Defines the unique identifier of the Work Unit to be added for assignment.
StartDate	Text	Yes	NA	01/01/2024	Defines the context of the assignment.
EndDate	Text	Optional	NA	01/01/9999	Remove employee assignment from the system.
EmployeeId	Text	Yes	NA	35.00	Defines the unique identifier of the employee who will be owning the assignment.
Effort	Decimal	Optional	100	100	Effort allocation for the assignment.

Field	Type	Required	Default	Sample Value	Description
RemoveEmployeeAssignment	Boolean	Optional	FALSE	FALSE	Remove the assignment from the system.
PrimaryAssignment	Boolean	Yes	FALSE	FALSE	Indicates whether the assignment is primary.

Product Assignment Changes

Field	Type	Required	Default	Sample Value	Description
ProductId	Text	Yes (Primary)	NA	CHA 31	Defines the unique identifier of the product assignment to be added in the system.
WorkUnitId	Text	Yes (Primary)	NA	9A99999	Defines the unique identifier of the Work Unit to be added for product assignment.
ProductAssignmentWeight	Decimal	Yes	NA	33.33	Stores information about the product assignment weight percent in the system.
RemoveProductAssignment	Boolean	Optional	FALSE	FALSE	Remove the product assignment from the system.

Product Assignment Changes (Applicable only for DR instances)

Name	Type	Required	Default	Sample Value	Description
ProductId	Text	Yes (Primary)	NA	E123	Defines the unique identifier of the product assignment to be added in the system.
WorkunitId	Text	Yes (Primary)	NA	ORGJCA0301C	Defines the unique identifier of the Work

Name	Type	Required	Default	Sample Value	Description
					Unit to be added for product assignment.
PositionId	Text	Yes	NA	ORG_1CA0301C_P1	Defines the unique identifier of the Position ID to be added for assignment changes
ProductAssignmentWeight	Decimal	Y	NA	100	Stores information about the product assignment weight percentage in the system.
RemoveProductAssignment	Boolean	Optional	False	False	Remove the product assignment from the system.

Position Changes

Field	Type	Required	SampleValue	Description
PositionReferenceID	Text	Optional	E123	Defines the unique identifier of the Position ID to be added for position assignment changes Note: Please note that this would be system generated if not provided by the user
PositionID	Text	Yes	ORG_1CA0301C_P1	Defines the unique identifier of the Position ID to be added for position assignment changes
New PositionID	Text	Optional		Defines the unique identifier of the Position ID to be added for position assignment changes
WorkUnitID	Text	Yes	ORG_1CA0301C	Defines the unique identifier of the Work unit to be assigned in the Position
RoleID	Text	Yes	GPS001	Defines the unique identifier of the role to be assigned in the Position.
RemovePosition	Text	Optional	False	Flag to remove Position

Customer Alignment Changes

Field	Type	Required	Default	Sample Value	Description
CustomerId	Text	Yes	NA	06001A	Defines the unique identifier of the customer to be added for alignment changes.
TeamId	Text	Yes	NA	TT_123	Defines the unique identifier of the team to be added for alignment changes.
WorkUnitId	Text	Optional	NA	1A0301C	Defines the unique identifier of the Work Unit to be added for alignment changes.
AlignmentWeight	Decimal	Optional	100.00	35.00	Stores information about customer's weight percent aligned to a Work Unit.

Field	Type	Required	Default	Sample Value	Description
AlignmentAttribute	Text	Mandatory	NA	Primary	Stores information about customers attribute alignment to a Work Unit Mandatory for teams for which Alignment Attribute is enabled
RemoveAlignment	Boolean	Optional	FALSE	TRUE	Remove the alignment changes from the system.

Work Unit Relationship Changes

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

Time Period

Field	Type	Required	Default	Sample Value	Description
TimePeriodId	Text	Yes	NA	TP1	Time Period Id for a time period
TimePeriodName	Text	Yes	NA	FirstQuater	Time Period Name for Given Time Period
EffectiveStartDate	Date	Yes	NA	1/1/2020	Time Period start Date
EffectiveEndDate	Date	Yes	NA	5/5/2020	Time Period End Date
RemoveTimePeriod	Boolean	No (Optional)	FALSE	TRUE	Remove flag to Time Period if No Scenario is created using it

Relationship Type Changes

Name	Type	Required	Default	Sample Value	Description
RelationshipTypeId	Text	Yes (Primary)	NA	R1	Defines the unique identifier of the relationship type to be added based on the data contract.
RelationshipTypeName	Text	Yes	NA	Managed	Name of the relationship type to be added based on the data contract.
RemoveRelationshipType	Boolean	Optional	FALSE	FALSE	Remove the relationship type from the system.

Affiliation Group Configuration Changes

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

Affiliation Network Data Upload Changes

Name	Type	Required	Default	Sample Value	Description
ParentCustomerID	Text	Yes (Primary Key/Identifier)	NA	CID1	Parent/ Driving Customer ID.
ChildCustomerID	Text	Yes (Primary Key/Identifier)	NA	CID2	Child/ Associated Customer ID.
RelationshipTypeID	Text	Yes (Primary Key/Identifier)	NA	R1	Describes relationship type between two customers.
RemoveAffiliationNetwork	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
AffiliationGroupID	Text	Yes (Primary)	NA	Config1	Defines the unique identifier for each Affiliation Group Configuration.
RelationshipTypeid	Text	Yes	NA	R1	Defines the unique identifier for the Relationship type to be used for Affiliation Group Configuration mapping.
RemoveMapping	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
AffiliationGroupId	Text	Yes (Primary)	NA	Config1	Defines the unique identifier for each Affiliation Group Configuration.
TeamId	Text	Yes (Primary)	NA	R1	Defines the unique identifier for the team to be used for Affiliation Group Configuration mapping.
RemoveMapping	Boolean	Optional	FALSE	FALSE	Removes the Affiliation Group Configuration from the system.

Affiliation Group Data Upload Changes

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

Custom Metric/Field Import

Custom Field Changes

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

Field	Type	Required	Default Value	Sample Value	Description
CustomFieldId	Text	Yes	NA	Cust001	Primary identifier for Custom Field created
CustomFieldDisplayName	Text	Yes	NA	Eligible for Sample	Display name of Custom field
Description	Text	Optional	NA		Details of custom field created
ObjectName	Text	Yes	NA	Customer	Name of the object for which custom field is created
DataType	Text	Yes	NA	Boolean	Type of Custom field (Text, Numeric, Date & Boolean)
AllowSharingSplitting	Boolean	Optional	False	False	Applicable for only Numeric field
SpecialCharacter	Text	Optional		“\$”	Supported by only Text & Numeric DataType. Allowed Special Characters: (#, %, (,), +, -, , /, [,],
SpecialCharacterAtBeginning	Boolean	Optional	False	NA	Applicable for Numeric and Text custom fields
NumberDecimalRoundTo	Number	Optional	Null	NA	Values will be: 0: No decimal value. Value rounded off to int (e.g., 129.98 → 130). 1–5: Round off to 1–5 decimals (e.g., 129.9876 with value 2 → 129.99).
NumberShowCommasAfterEvery	Number	Optional		NA	Allowed values between 1–5
CommaAtBeginning	Boolean	Optional	Null	NA	Flag to show commas based on numbers provided in NumberShowCommaAfterEvery field.
AllowUIEditability	Boolean	Optional	False	NA	This field is applicable for Employee and Employee Assignment objects

Field	Type	Required	Default Value	Sample Value	Description
IsMandatoryField	Boolean	Optional	False	NA	This field is applicable for Employee object only
IsLovField	Boolean	Optional	False	NA	This field is applicable for Employee object with DataType as Text only
EmailFormatCheck	Boolean	Optional	False	NA	This field is applicable for Employee object with DataType as Text only
EndsWith	Text	Optional	Null	NA	This field is applicable for Employee object and DataType as Text. If value is provided, validation is enabled with the provided text.
RemoveCustomField	Boolean	Optional		False	Flag to remove Custom Field
LimitToScenario	Boolean	Optional		True	Restrict scenario in scenario mode

Custom Field Visibility Changes (Team-Role)

Name	Type	Required	Default Value	Description
CustomFieldId	Text	Yes	Null	Custom Field Id for which visibility is to be updated
TeamId	Text	Yes	Null	TeamId for which visibility is to be updated
RoleId	Text	Optional	Null	RoleId for which visibility is to be updated
RemoveCustomFieldRoleVisibility	Boolean	Optional	Null	If True, removes visibility of the custom field for the provided Team–Role combination

Custom Field Visibility Changes (Customer Type)

Name	Type	Required	Default Value	Description
CustomFieldId	Text	Yes	Null	Custom Field id for which customer type visibility is to be provided.
CustomerTypeId	Text	Yes	Null	Customer type for which visibility is to be provided
RemoveCustomFieldCustomerType	Boolean	Optional	Null	



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

Custom Field Visibility Changes (Application)

Name	Type	Required	Default Value	Details
Custom Field ID	Text	Yes	Null	Custom Field Id for which visibility is to be updated. For example, <i>Age</i> .
Application	Text	Yes	Null	Application for which visibility is to be updated. For example, <i>Call Planning, Deployment, Segmentation</i> .
RemoveCustomFieldAppVisibility	Boolean	Optional	Null	If set to true, application mapping is removed.

Custom Field Visibility Changes (Configs)

Name	Type	Required	Default Value	Details
Custom Field ID	Text	Yes	Null	Custom Field Id for which visibility is to be updated.
Config	Text	No	Null	Enables visibility for Filter and/or Segment configurations within the Call Plan Generation workflow. Currently, only cp.filter and cp_segment are supported for Call Plan.
RemoveCustomFieldConfigVisibility	Boolean	Optional	Null	If set to true, that particular filter or segment setting will be removed.

Customer Field Value Upload

This section outlines the process for uploading values to custom fields associated with various objects in the system.

Base Object Upload Guidelines

Custom field values can be uploaded for specific base objects using only the **Primary Key (identifier)** column and the relevant **Custom Field ID** columns.

Name	Type	Required	Default	Sample Value	Description
CustomerId	Text	Yes (Primary)	NA	A00003G3	Unique identifier for the customer.
CustomFieldId1	Text	Optional	Null/Empty	NA	Value for a custom field associated with the base object (e.g., customer, product).
CustomFieldId2	INT	Optional	Null/Empty	NA	Value for a custom field associated with the base object.
CustomFieldId3	Boolean	Optional	FALSE	NA	Value for a custom field associated with the base object.

Custom Field Upload for Call Planning Objects

For call planning-related objects, custom field values must be uploaded using the following required columns:

Object Name	Required Columns
Customer	CustomerId
Customer – Team	CustomerId, TeamId
Customer – Product	CustomerId, ProductId
Customer Address	CustomerId, CustomerAddressId

Data Contracts Specific to ZAIDYN Call Plan

Channel

Name	Type	Required	Default	Sample Value	Description
ChannelId	Text	Yes – Primary	NA	2	ID of the Channel that is being added, edited or deleted
ChannelName	Text	Yes	NA	Email	Defines the name of the Channel
RemoveChannel	Boolean	Optional	FALSE	FALSE	Remove channel from system

Team to Channel

Name	Type	Required	Default	Sample Value	Description
TeamId	Text	Yes – Primary	NA	T1	ID of the Team
CallPlanId	Text	Optional	NA	CP123	ID of the Call Plan (if provided, updates apply to that draft call plan)
ChannelId	Text	Yes	NA	Ch2	ID of the Channel
ChannelWeight	Numeric	Yes	NA	1.5	Weight for the channel (percentage and non-zero input)
AggregationType	Text	Yes	NA	Sum	Aggregation type: Sum, Max, or PriorityProduct (PriorityProduct allowed only when call plan type = Product)
RemoveMapping	Boolean	Optional	FALSE	FALSE	Remove team–channel mapping

Reason Code

Name	Type	Required	Default	Sample Value	Description
ReasonCodeId	Text	Y – Primary	NA	RC1	ID of the reason code
ReasonCodeType	Text	Optional	NA	Add / Modify / Delete	Operation type
ReasonCode	Text	Optional	NA	High Value Customer	Name/label of the reason
RemoveReasonCode	Boolean	Optional	FALSE	FALSE	Remove the reason code

Reason Code Locale

Name	Type	Required	Default	Sample Value	Description
ReasonCodeID	Text	Yes	NA	RC12	Defines the unique identifier of the reason code
ReasonCode	Text	Yes	NA	High Value Customer	Defines name of the reason code
ReasonCodeLocale	Text	Yes	NA	fr-FR	Defines Locale code
RemoveReasonCodeLocale	Boolean	Optional	FALSE	FALSE	Removes the reason code locale

Team to Reason Code

Name	Type	Required	Default	Sample Value	Description
TeamId	Text	Yes – Primary	NA	T1	ID of the Team
ReasonCodeId	Text	Yes	NA	RC1	ID of the Reason Code
RemoveMapping	Boolean	Optional	FALSE	FALSE	Remove team–reason code mapping

Call Planning Team Setting

Name	Type	Required	Default	Sample Value	Description
TeamId	Text	Yes – Primary	NA	101	ID of the Team
CallPlanType	Text	Yes	NA	Product	Product or Lineup
CallPlanGrain	Text	Yes	Individual	Individual	Affiliation or Individual (Individual only for this release)
AllowedCustomerAddition	Text	Optional	None	In Work unit	None, In Work unit, All (in country)
AllowAbsoluteAggregation	Boolean	Optional	FALSE	TRUE	Show absolute aggregation (interactions)
AllowWeightedAggregation	Boolean	Optional	FALSE	TRUE	Show weighted aggregation (capacity)
CallPlanPeerEditAccess	Boolean	Optional	FALSE	TRUE	Allow users to define if a rep can edit call plan of another rep's in case of DR enabled instance
CallPlanAddReasonCodeMandatory	Boolean	Optional	TRUE	TRUE	Require reason code on add
CallPlanAddReasonCodeCustomInput	Boolean	Optional	FALSE	TRUE	Allow custom reason on add
CallPlanDeleteReasonCodeMandatory	Boolean	Optional	TRUE	TRUE	Require reason code on delete

Name	Type	Required	Default	Sample Value	Description
CallPlanDeleteReasonCodeCustomInput	Boolean	Optional	FALSE	TRUE	Allow custom reason on delete
CallPlanEditReasonCodeMandatory	Boolean	Optional	TRUE	TRUE	Require reason code on edit
CallPlanEditReasonCodeCustomInput	Boolean	Optional	FALSE	TRUE	Allow custom reason on edit

Team to Customer Type Call Planning

Name	Type	Required	Default	Sample Value	Description
TeamId	Text	Y – Primary	NA	T101	ID of the Team
CallPlanCustomerId	Text	Y – Primary	NA	CT1	ID of the Customer Type mapped to the team
AllowAffiliation	Boolean	Optional	FALSE	TRUE	Specify for the team if Affiliations are applicable
RemoveMapping	Boolean	Optional	FALSE	FALSE	Remove team–customer type mapping

Team to Product

Name	Type	Required	Default	Sample Value	Description
TeamId	Text	Yes – Primary	NA	T101	ID of the Team
ProductId	Text	Yes – Primary	NA	P1	ID of the Product
ProductPriority	Numeric	Yes	NA	1	Product priority (mandatory for Product call plans; for Lineup call plan it gets defines based on first-seen product)
ProductWeight	Numeric	Optional	NA	100	Product weight (mandatory if call plan type = Lineup; not relevant for Product type)
RemoveMapping	Boolean	Optional	FALSE	FALSE	Remove team–product mapping

Team Default Capacity

Name	Type	Required	Default	Sample Value	Description
Tamid	Text	Yes – Primary	NA	T101	ID of the Team
CallPlanId	Text	Optional	NA	CP1	ID of the Call Plan
WorkingDaysInACycle	Numeric	Yes	NA	20	Working days in a cycle
PlannedInteractionPerDay	Numeric	Yes	NA	4	Interactions per day
MinimumBaselineCapacity	Numeric	Yes	NA	100	Lower limit of weighted interactions (Percentage input)
MaximumBaselineCapacity	Numeric	Yes	NA	120	Upper limit of weighted interactions (Percentage input)
UpperOptimalLimit	Numeric	Yes	NA	110	Maximum optimal weighted interactions (Percentage input)
LowerOptimalLimit	Numeric	Yes	NA	90	Minimum optimal weighted interactions (Percentage input)

Work Unit Override Capacity

Name	Type	Required	Default	Sample Value	Description
TeamId	Text	Yes – Primary	NA	T101	ID of the Team
CallPlanId	Text	Optional	NA	CP1	ID of the Call Plan
WorkunitId	Text	Yes	NA	WU1	ID of the Work Unit
PositionId	Text	Optional	NA	Pos1	Position within the Work Unit (if applicable)
MinimumBaselineCapacity	Numeric	Yes	NA	100	Lower limit of weighted interactions (Percentage input)
MaximumBaselineCapacity	Numeric	Yes	NA	120	Upper limit of weighted interactions (Percentage input)
UpperOptimalLimit	Numeric	Yes	NA	110	Maximum optimal weighted interactions (Percentage input)
OptimalCapacity	Numeric	Yes	NA	80	Optimal capacity for the Work Unit (Percentage input)
LowerOptimalLimit	Numeric	Yes	NA	90	Minimum optimal weighted interactions (Percentage input)

Name	Type	Required	Default	Sample Value	Description
ResetCapacity	Boolean	Optional	FALSE	FALSE	Reset capacity to team defaults

Aggregated Segment List of Value

Name	Type	Required	Default	Sample Value	Description
TeamId	Text	Yes – Primary	NA	T1	ID of the Team
AggregatedSegmentValue	Text	Yes	NA	T1Gold	Value/name of the aggregated segment for the team
Remove	Boolean	Optional	FALSE	FALSE	Removes the existing aggregated-segment value for the team

Call Plan Base

Name	Type	Required	Default	Sample Value	Description
TeamId	Text	Y – Primary	NA	T101	ID of the Team
TimePeriodId	Text	Y	NA	P1	ID of the cycle/time period
CallPlanId	Text	Y	NA	CP1	ID of the Call Plan
CallPlanName	Text	Y	NA	Draft Plan 1	Name of the Call Plan draft scenario
RefinementStartDate	Date	Optional	NA	2025-01-01	Start date of refinement
RefinementEndDate	Date	Optional	NA	2025-03-01	End date of refinement
RemoveCallPlan	Boolean	Optional	FALSE	FALSE	Remove the call plan scenario

Call Plan Import

Call plan import can be done using the following four objects: **Call Plan Customer**, **Call Plan Product Lineup**, **Call Plan Channel Activity**, and **Call Plan Aggregated Segment**.

Call Plan Customer


Name	Type	Required	Default	Sample value	Description
CallPlanId	Text	Yes	NA	CP1	Each Team will have a call plan created. Call Plan Id into which this call plan will be uploaded needs to be specified.
TeamId	Text	Yes	NA	T101	Call plans can be uploaded for Multiple Teams together. Specify the Team ID for which the records are uploaded.
WorkunitId	Text	Yes	NA	WU1	A Team can have multiple Work Units and this will determine for which WU(s) the call plan is uploaded.
PositionId	Text	No	NA	Pos1	If there are multiple positions within a WU and the concept of Differential resourcing is enabled, the users will need to provide the Position IDs.
CustomerId	Text	Yes	NA	Cust1	Specify the customer Ids which will be included in the call plan.
CustomerCallId	Text	Yes	NA	100	Unique identifier for each record in the call plan.



Note: The import will function based on the instance configuration (**AllowCustomerAlignmentCheck**) for alignment validation.

Call Plan Product Lineup

Name	Type	Required	Default	Sample value	Description
CallPlanId	Text	Yes	NA	CP1	Each Team will have a call plan created. Call Plan Id into which this call plan will be uploaded needs to be specified.
TeamId	Text	Yes	NA	T101	Call plans can be uploaded for Multiple Teams together. Specify the Team ID for which the records are uploaded.
CustomerCallId	Text	Yes	NA	100	Unique identifier for each record in the call plan.
ProductId	Text	Yes	NA	P1	Id of the Product.
ProductSequence	Text	Yes	NA	1	Specify the sequence of the product. This will be used for Lineup type of call plan. If the call plan is Lineup, ProductSequence helps define which product appears first on UI.



Note: The import will function based on the instance configuration (**AllowProductAssignmentCheck**) for product assignment validation.

Call Plan Channel Activity

Name	Type	Required	Default	Sample value	Description
CallPlanId	Text	Yes	NA	CP1	Each Team will have a call plan created. Call Plan Id into which this call plan will be uploaded needs to be specified.
TeamId	Text	Yes	NA	T101	Call plans can be uploaded for Multiple Teams together. Specify the Team ID for which the records are uploaded.
CustomerCallId	Text	Yes	NA	100	Unique identifier for each record in the call plan.
ChannelId	Text	Yes	NA	Ch1	This field will contain the call value for a given Customer–Work unit/Position–Product(s) combination for the specified channel.
Activity	Text	Yes	NA	4	Call frequency or call details against the channel.

Call Plan Aggregated Segment

Name	Type	Required	Default	Sample value	Description
CallPlanId	Text	Yes	NA	CP1	Each Team will have a call plan created. Call Plan Id into which this call plan will be uploaded needs to be specified.
TeamId	Text	Yes	NA	T101	Call plans can be uploaded for Multiple Teams together. Specify the Team ID for which the records are uploaded.
CustomerId	Text	Yes	NA	Cust1	Specify the customer Ids which will be included in the call plan.
ProductID	Text	Yes	NA	P1	Id of the Product should be provided in case of Product level Call Plan, can be skipped in case of Lineup level Call Plan.
AggregatedSegment	Text	Yes	NA	T1Gold	Specify the customer-level segment for Lineup-level call plans and the Customer-Product segment for Product-level call plans.

Job Status API

The Job Status API allows you to monitor the progress and completion status of an import job.

Type: GET

URL: {baseUrl}/{instance}/JobStatus?JobId={jobId}

Endpoint: /JobStatus

Query Parameters

Name	Type	Required	Sample Value	Description
JobId	Text (string)	Yes	abc123	Job identifier returned by the Import API.

Response Body: application/JSON

```
{
  "StartTime": "2025-10-15T17:00:00Z",
  "Status": "Completed",
  "IsSuccess": true,
  "FailureMessage": "",
  "RunTimeTicks": 1234567890
}
```

Response Parameters

Name	Type	Sample Value	Description
StartTime	Text (timestamp)	2025-03-27 07:05:33.4532	Job start time.
Status	Text	Success / Running / Failed	Job status.
IsSuccess	Boolean	true	Indicates final success/failure.
FailureMessage	Text	Validation errors found	Failure reason if any.
RunTimeTicks	Integer	1280000	Execution time (system-specific units).

Import Summary and Validations

The Import Summary and Validations API provides a comprehensive overview of the results generated after an import job completes. It enables users to retrieve detailed information including:

- Summary of processed records
- Validation errors encountered
- Warnings or informational messages

Type: GET

URL: {baseUrl}/{instance}/file/ImportSummaryAndValidations?RequestId=?

Endpoint: /file/ImportSummaryAndValidations

Query Parameters

Name	Type	Required	Sample Value	Description
RequestId	Text (string)	Yes	abc123	Job identifier returned by the Job status API.

Response Body: application/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
}
```

Response Parameters

Parameter	Sub-parameter	Type	Description
Summary		Object	Contains overall statistics and messages related to the import job.
	RequestId	String	Unique identifier for the import request.
	RequestTime	String	Timestamp of when the import request was initiated.
	TotalIgnoredRecords	Integer	Number of records ignored during import.
	TotalErroredRecords	Integer	Number of records that failed due to errors.
	TotalWarningRecords	Integer	Number of records that generated warnings.
	TotalProcessedRecords	Integer	Total number of records successfully processed.
	TotalConflictOverrideRecords	Integer	Records processed with conflict override.
	TotalConflictEndDateRecords	Integer	Records with end date conflicts.
	TotalRemovedRecords	Integer	Records removed during the import process.
	TotalConflictIgnoredRecords	Integer	Records with conflicts that were ignored.
	TotalGuardrailErrors	Integer	Number of records that failed due to guardrail (validation) errors.
	TotalGuardrailWarnings	Integer	Number of records that triggered guardrail warnings.
	SummaryMessage	String	Summary message providing additional context or status of the import.
RecordErrorWarningDetailsFileBucketName		String	Name of the storage bucket containing error/warning details file.

Parameter	Sub-parameter	Type	Description
RecordErrorWarningDetailsFileRelativePath		String	Relative path to the error/warning details file within the bucket.

Publish API


The API is used to publish the generated or externally uploaded call plan into the system.

Type: POST

URL: {baseUrl}/{tenant}-7008a/asyncjob/trigger-publish-call-plan-job

Endpoint: /asyncjob/trigger-publish-call-plan-job

Input Header: CallPlanId

	<p>Notes:</p> <ul style="list-style-type: none"> CallPlanId is mandatory custom header. Users will receive an error if not passed. Request body is not required for this API.
--	--

Response Body: application/JSON

```
55599621-a98e-11f0-b34c-d30785172f84
```

Response Parameters

Name	Type	Sample Value	Description
UUID	Text	2025-03-27 07:05:33.4532	Identifier that uniquely identifies the asynchronous job that was triggered to publish the call plan. Users can use this ID to track the status of the job.

Export API

The Export API facilitates the extraction of Call Planning data and master scenario configurations, enabling seamless integration with external systems or reporting tools.

Type: POST

URL: {baseUrl}/{instance}/file/ExportRequest

Endpoint: /file/ExportRequest

Header Details: To successfully export Call Plan data—including *Call Plan Customer*, *Call Plan Product Lineup*, *Call Plan Channel Activity*, and *Call Plan Aggregated Segment*—the API requires specific header values. These headers must precisely match the configuration defined for the associated Call Plan scenario. Any mismatch in header fields will result in export job failure.

Header Name	Type	Required	Sample Value	Description
TimePeriodID	Text	Yes	TP_Q1	Time Period ID/ Cycle ID for which call plan was created
DeletedCustomer	Text	No	False	Indicates whether deleted customers should be included in the export.



Notes:

- The `TeamID` must be provided as a literal filter. If omitted, the export will return a blank file.
- All required header fields must be populated. If the combination of header values does not correspond to a valid Call Plan scenario, the export will result in a blank file.
- Ensure that the header values accurately match a defined scenario. Any mismatch will prevent successful data retrieval.

Request Body: application/JSON

```
{
  "EffectiveStartDate": "2025-01-01",
  "EffectiveEndDate": "2025-12-31",
  "LastApprovedFrom": "2025-02-01",
  "LastApprovedTo": "2025-03-01",
  "ObjectDetails": [
    {
      "ObjectName": "Team-Product",
      "Filter": {
        "Condition": {
          "IN": [
            { "Col": { "Name": "TeamId" } },
            [ { "Literal": { "Value": "T101" } } ]
          ]
        }
      }
    }
  ]
}
```

Request Parameters

Name	Type	Required	Sample Value	Description
EffectiveStartDate	Date	Optional	2025-01-01	Start date filter for exported records.
EffectiveEndDate	Date	Optional	2025-12-31	End date filter for exported records.
LastApprovedFrom	Date	Optional	2025-02-01	System date from which last changes can be exported.
LastApprovedTo	Date	Optional	2025-03-01	System date until which the last changes can be exported.
ObjectDetails [ObjectName]	Text	Required	Team-Product	Object being exported.
ObjectDetails [FieldName]	Text	No	ProductID	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).
ObjectDetails[Filter.Condition.IN]	JSON	Optional	see sample	Filter conditions applied to columns (literal values).

Response Body: application/JSON

```
{
  "JobId": "abc123",
}
```


Response Parameters

Name	Type	Sample Value	Description
JobId	Text (string)	abc123	Unique identifier for the export job. Use this ID with the Export Summary API to track progress.

Call Plan Specific Objects

This section outlines the specific data objects available for export within the Call Planning module.

Channel

The following table lists the object parameters used for Channel.

Name	Type	Default	Sample Value	Description
ChannelId	Text	NA	2	ID of the Channel that is being added, edited or deleted
ChannelName	Text	NA	Email	Defines the name of the Channel
EffectiveStartDate	Date	NA	2025-01-01	Date from which the record should be active in the system
RemoveStarting	Date	NA	2025-06-01	Date from which the record will be deleted/removed from the system
EffectiveEndDate	Date	NA	2025-12-31	Date from which the record will be inactive in the system
LastUpdatedDate	Date	NA	2025-03-27	System date on which the last change was made to the record

Team to Channel

The following table lists the object parameters used for Team to Channel mapping.

Name	Type	Default	Sample Value	Description
TeamId	Text	NA	T1	ID of the team for which the channel mapping is being added, updated, or deleted
CallPlanId	Text	NA	CP123	ID of the call plan scenario. If not provided, channel updates apply at the team level; if provided, updates apply only to the specified draft call plan
ChannelId	Text	NA	Ch2	ID of the channel
ChannelWeight	Text	NA	150%	Defines weight for the channel (percentage and non-zero input)
AggregationType	Text	NA	Sum	Defines aggregation types (Sum, Max, or Priority Product). Relevant only when call plan type is Product; not relevant for Lineup-level call plans
EffectiveStartDate	Date	NA	2025-01-01	Date from which the record should be active in the system
RemoveStarting	Date	NA	2025-06-01	Date from which the record will be deleted/removed from the system
EffectiveEndDate	Date	NA	2025-12-31	Date from which the record will be inactive in the system
LastUpdatedDate	Date	NA	2025-03-27	System date on which the last change was made to the record

Reason Code

The following table lists the object parameters used for Reason Code.

Name	Type	Default	Sample Value	Description
ReasonCodeId	Text	NA	RC1	Defines the unique identifier of the reason code
ReasonCodeType	Text	NA	Add / Edit / Delete	Defines type of reason code operation (Add, Edit, Delete)
ReasonCode	Text	NA	High Value Customer	Defines the name/label of the reason code
EffectiveStartDate	Date	NA	2025-01-01	Date from which the record should be active in the system
RemoveStarting	Date	NA	2025-06-01	Date from which the record will be deleted/removed from the system
EffectiveEndDate	Date	NA	2025-12-31	Date from which the record will be inactive in the system
LastUpdatedDate	Date	NA	2025-03-27	System date on which the last change was made to the record

Reason Code Locale

Name	Type	Default	Sample Value	Description
ReasonCodeID	Text	NA	RC12	Defines the unique identifier of the reason code
ReasonCode	Text	NA	High Value Customer	Defines name of the reason code
ReasonCodeLocale	Text	NA	fr-FR	Defines Locale code

Team to Reason Code

The following table lists the object parameters used for Team to Reason code mapping.

Name	Type	Default	Sample Value	Description
TeamId	Text	NA	T1	ID of the team for which the reason-code mapping is being added, updated, or deleted
ReasonCodeId	Text	NA	RC1	ID of the reason code being mapped to the team
EffectiveStartDate	Date	NA	1/1/2025	Date from which the mapping should be active
RemoveStarting	Date	NA	6/1/2025	Date from which the mapping will be deleted/removed from the system
EffectiveEndDate	Date	NA	12/31/2025	Date from which the mapping will be inactive
LastUpdatedDate	Date	NA	3/27/2025	System date on which the last change was made to the record

Call Planning Team Setting

This section defines the object parameters related to team configurations within the Call Planning module.

Name	Type	Default	Sample Value	Description
TeamId	Text	NA	101	ID of the Team
CallPlanType	Text	NA	Product	Defined type of call plan. Options: Product or Lineup
CallPlanGrain	Text	Individual	Individual	Affiliation or Individual (Individual for this release)
AllowedCustomerAddition	Text	None	In Work unit	Options: None, In Work unit, All (In Country)
AllowAbsoluteAggregation	Boolean	FALSE	TRUE	Show absolute aggregation (interactions)
AllowWeightedAggregation	Boolean	FALSE	TRUE	Show weighted aggregation (capacity)
CallPlanPeerEditAccess	Boolean	Optional	FALSE	Allow user to define if a rep can edit call plan of another reps in case of DR enabled instance
CallPlanAddReasonCodeMandatory	Boolean	TRUE	TRUE	Defines if reason codes must be provided when adding
CallPlanAddReasonCodeCustomInput	Boolean	FALSE	TRUE	Defines if reason codes can be custom when adding
CallPlanDeleteReasonCodeMandatory	Boolean	TRUE	TRUE	Defines if reason codes must be provided when deleting
CallPlanDeleteReasonCodeCustomInput	Boolean	FALSE	TRUE	Defines if reason codes can be custom when deleting
CallPlanEditReasonCodeMandatory	Boolean	TRUE	TRUE	Defines if reason codes must be provided when editing
CallPlanEditReasonCodeCustomInput	Boolean	FALSE	TRUE	Defines if reason codes can be custom when editing
EffectiveStartDate	Date	NA	2025-01-01	Date from which the record should be active

Name	Type	Default	Sample Value	Description
RemoveStarting	Date	NA	2025-06-01	Date from which the record will be deleted/removed from the system
EffectiveEndDate	Date	NA	2025-12-31	Date from which the record will be inactive
LastUpdatedDate	Date	NA	2025-03-27	System date on which the last change was made to the record

Team to Customer Type Call Planning

Name	Type	Default	Sample Value	Description
TeamId	Text	NA	T101	ID of the Team
CallPlanCustomerId	Text	NA	CT1	ID of the Customer Type
AllowAffiliation	Boolean	FALSE	TRUE	Specify for the team if Affiliations are applicable
EffectiveStartDate	Date	NA	NA	Date from which the record should be active in the system.
RemovedStarting	Date	NA	NA	Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA	NA	Date from which the record will be inactive in the system.
LastUpdatedDateFrom	Date	NA	NA	System date on which the last change was made to the record

Team to Product

The following table lists the object parameters related to Team to Product mapping for call planning.

Name	Type	Default	Sample Value	Description
TeamId	Text	NA	T101	ID of the Team
ProductId	Text	NA	P1	ID of the Product
ProductPriority	Numeric	NA	1	Specifies the priority of the product. • Mandatory if Call Plan type = Product. • For Lineup plans, defines which product a rep/user sees first on UI
ProductWeight	Numeric	NA	100	Specifies the weight of the product. • Mandatory if Call Plan type = Lineup. • Not relevant for Product call plan type
EffectiveStartDate	Date	NA	2025-01-01	Date from which the record should be active in the system
RemoveStarting	Date	NA	2025-06-01	Date from which the mapping will be deleted/removed
EffectiveEndDate	Date	NA	2025-12-31	Date from which the record will be inactive
LastUpdatedDate	Date	NA	2025-03-27	System date on which the last change was made to the record

Team Default Capacity

The following table lists the object parameters used for Team's Default capacity.

Name	Type	Default	Sample Value	Description
TeamId	Text	NA	T101	ID of the Team (<i>user can apply literal filter conditions on all columns</i>)
CallPlanId	Text	NA	CP1	ID of the Call Plan
WorkingDaysInACycle	Numeric	NA	20	Number of working days in a cycle
PlannedInteractionPerDay	Numeric	NA	4	Number of planned interactions per day
MinimumBaselineCapacity	Numeric	NA	100	Defines the lower limit of weighted interactions an employee should be able to complete within a specific time period (<i>% input</i>)
MaximumBaselineCapacity	Numeric	NA	120	Defines the upper limit of weighted interactions an employee can realistically complete within a given time period (<i>% input</i>)
UpperOptimalLimit	Numeric	NA	110	Defines the maximum weighted interactions an employee can make (<i>% input</i>)
LowerOptimalLimit	Numeric	NA	90	Defines the minimum weighted interactions an employee can make (<i>% input</i>)
EffectiveStartDate	Date	NA	1/1/2025	Date from which the record should be active in the system
RemoveStarting	Date	NA	6/1/2025	Date from which the record will be deleted/removed from the system
EffectiveEndDate	Date	NA	12/31/2025	Date from which the record will be inactive
LastUpdatedDate	Date	NA	3/27/2025	System date on which the last change was made to the record

Work Unit Override Capacity

The following table lists the object parameters used for Override capacity at Work unit.

Name	Type	Default	Sample Value	Description
TeamId	Text	NA	T101	ID of the Team (<i>user can apply literal filter condition on all columns</i>)
CallPlanId	Text	NA	CP1	ID of the Call Plan
WorkunitId	Text	NA	WU1	ID of the Work Unit within the team
PositionId	Text	NA	Pos1	ID of the Position within the Work Unit (if applicable)
MinimumBaselineCapacity	Numeric	NA	100	Defines the lower limit of weighted interactions an employee should be able to complete within a specific time period (<i>% input</i>)
MaximumBaselineCapacity	Numeric	NA	120	Defines the upper limit of weighted interactions an employee can realistically complete within a given time period (<i>% input</i>)
UpperOptimalLimit	Numeric	NA	110	Defines the maximum weighted interactions an employee can make (<i>% input</i>)
OptimalCapacity	Numeric	NA	80	Defines the optimal weighted interactions per Work Unit (<i>% input</i>)
LowerOptimalLimit	Numeric	NA	90	Defines the minimum weighted interactions an employee can make (<i>% input</i>)
EffectiveStartDate	Date	NA	1/1/2025	Date from which the record should be active
RemoveStarting	Date	NA	6/1/2025	Date from which the record will be deleted/removed from the system
EffectiveEndDate	Date	NA	12/31/2025	Date from which the record will be inactive
LastUpdatedDate	Date	NA	3/27/2025	System date on which the last change was made to the record

Work Unit Approval Request

Name	Type	Default	Sample Value	Description
WorkunitID	Text	NA	WU1	ID of the work unit
CallPlanID	Text	NA	CP1	Id of the call plan
ApprovalStatus	Text	Approved	Approved or Pending for approval	Shows the approval status of the work unit
WorkunitName	Text	NA	Albany	Name of the work unit
TimePeriodID	Text	NA	TP_Q1	ID of the Time Period
TeamID	Text	NA	T101	ID of the team
EmployeeAssignmentID	Text	NA	Emp1	Employee assignment ID
EffectiveStartDate	Date	NA	1-Jan	Effective start date

Aggregated Segment

Field	Type	Required	Sample Value	Description
TeamID	Text	Yes	T1	ID of the Team
AggregatedSegmentValue	Text	Yes	T1Gold	Value or the name of the aggregated segment

Call Plan Base

Name	Type	Default	Sample Value	Description
TeamId	Text	NA	T101	ID of the Team
TimePeriodId	Text	NA	p1	ID of the cycle/ time period
CallPlanId	Text	NA	Cp1	ID of the call plan
CallPlanName	Text	NA	100	Name of the call plan draft scenario
RefinementStartDate	Date	NA	NA	Start date of refinement
RefinementEndDate	Date	NA	NA	End date of refinement

Call Plan Export

Call Plan data can be exported using four key objects: **Call Plan Customer**, **Call Plan Product Lineup**, **Call Plan Channel Activity**, and **Call Plan Aggregated Segment**.

Call Plan Customer

Name	Type	Default	Sample value	Description
CallPlanId	Text	NA	CP1	Each Team will have a call plan created. Call Plan Id into which this call plan will be uploaded needs to be specified.
TeamId	Text	NA	T101	Call plans can be uploaded for Multiple Teams together. Specify the Team ID for which the records are uploaded.
WorkunitId	Text	NA	WU1	A Team can have multiple Work Units and this will determine for which WU(s) the call plan is uploaded.
PositionId	Text	NA	Pos1	If there are multiple positions within a WU and the concept of Differential resourcing is enabled, the users will need to provide the Position IDs.
CustomerId	Text	NA	Cust1	Specify the customer Ids which will be included in the call plan.
CustomerCallID	Text	NA	100	Unique identifier for each record in call plan.
ReasonCode	Text	NA	Sample value	Defines the description/name of the reason code.

Call Plan Product Lineup

Name	Type	Default	Sample value	Description
CallPlanId	Text	NA	CP1	Each Team will have a call plan created. Call Plan Id into which this call plan will be uploaded needs to be specified.
TeamId	Text	NA	T101	Call plans can be uploaded for Multiple Teams together. Specify the Team ID for which the records are uploaded.
CustomerCallId	Text	NA	100	Unique identifier for each record in the call plan.
ProductId	Text	NA	P1	Id of the Product.
ProductSequence	Text	NA	1	Specify the sequence/priority of the product based on pre-refinement changes. This will be used for Lineup type of Call Plans.
CommittedProductSequence	Text	NA	2	Specify the sequence/priority of the product based on post-refinement changes. This will be used for Lineup type of Call Plans.

Call Plan Channel Activity

Name	Type	Default	Sample value	Description
CallPlanId	Text	NA	CP1	Each Team will have a call plan created. Call Plan Id into which this call plan will be uploaded needs to be specified.
TeamId	Text	NA	T101	Call plans can be uploaded for Multiple Teams together. Specify the Team ID for which the records are uploaded.
CustomerCallId	Text	NA	100	Unique identifier for each record in the call plan.
ChannelId	Text	NA	Ch1	This field will contain the call value for a given Customer–Work unit/Position–Product(s) combination for the specified channel.
Activity	Text	NA	4	Call frequency or call details against the channel.
CommittedActivity	Text	NA	5	Call frequency or call details against the channel post-refinement.

Call Plan Aggregated Segment

Name	Type	Default	Sample value	Description
CallPlanId	Text	NA	CP1	Each Team will have a call plan created. Call Plan Id into which this call plan will be uploaded needs to be specified.
TeamId	Text	NA	T101	Call plans can be uploaded for Multiple Teams together. Specify the Team ID for which the records are uploaded.
CustomerId	Text	NA	Cust1	Specify the customer Ids which will be included in the call plan.
ProductID	Text	NA	P1	Id of the Product.
AggregatedSegment	Text	NA	T1Gold	Specify the customer-level segment for Product Lineup-level call plans and the Customer-Product segment for Product-level call plans.

Call plan Export based on Aggregations

Users can use the following objects for exporting call plans based on aggregations:

Customer Interactions

Name	Type	Default	Sample value	Description
CallPlanID	Text	NA	CP1	Each Team will have a call plan created. Call Plan Id into which this call plan will be uploaded need to be specified.
TeamID	Text	NA	T101	Call plans can be uploaded for multiple Teams together. Specify the Team ID for which the records are uploaded.
WorkunitID	Text	NA	WU1	A Team can have multiple Work Units and this will determine for which WU(s) call plan is uploaded.
PositionID	Text	NA	Pos1	If there are multiple positions within a WU and concept of Differential Resourcing is enabled, the users will need to provide the position ids to which the call plan will be uploaded.
CustomerID	Text	NA	Cust1	Specify the customer Ids for which will be included in the Call plan.
TotalInteractions	Text	NA	12	Sum of interactions across channels and products based on aggregation type before refinement.
CommittedTotalInteractions	Text	NA	10	Sum of interactions across channels and products based on aggregation type post refinement.
TotalWeightedInteractions	Text	NA	5.8	Weighted sum of interactions (based on channel weighted) across Channel before refinement.
TotalCommittedWeightedInteractions	Text	NA	4.8	Weighted sum of interactions (based on channel weighted) across Channel post refinement.

Customer Channel Interactions

Name	Type	Default	Sample value	Description
CallPlanID	Text	NA	CP1	Each Team will have a call plan created. Call Plan Id into which this call plan will be uploaded need to be specified.
TeamID	Text	NA	T101	Call plans can be uploaded for Multiple Teams together. Specify the Team ID for which the records are uploaded
WorkunitID	Text	NA	WU1	A Team can have multiple Work Units and this will determine for which WU(s) call plan is uploaded
PositionID	Text	NA	Pos1	If there are multiple positions within a WU and concept of Differential resourcing is enabled, the users will need to provide the position ids to which the call plan will be uploaded
CustomerID	Text	NA	Cust1	Specify the customer Ids for which will be included in the Call plan
ChannelID	Text	NA	Ch1	This field will contain the call value for given Customer- Work unit/position-Product(s) for specified channel
Interactions	Text	NA	7	Channel level interactions across products based on aggregation type before refinement
CommittedInteractions	Text	NA	4	Channel level interactions across products based on aggregation type post refinement



Note: Aggregations are supported based on the aggregation type configured during Admin setup.

Base Object Details

This section shows the export details of the following objects.

Customer Type Changes

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

Customer Changes

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

Customer Address

Name	Type	Default	Sample Value	Description
CustomerId	Text	NA	A00003G3	Defines the unique identifier of the customer being created.
CustomerAddressId	Text	NA	123 North Terrace	Since a customer can have multiple addresses, this property defines the unique identifier of the customer's address.
CustomerAddress1	Text	Null	Suite 456	Address line 1 for the address being added.
CustomerAddress2	Text	Null	Suite 456	Address line 2 for the address being added.
CustomerCity	Text	NA	Evanston	Since a customer can have multiple addresses, this property defines the city of the customer's address.
CustomerState	Text	NA	IL	Since a customer can have multiple addresses, this property defines the state of the customer's address.
CustomerCountry	Text	NA	USA	Since a customer can have multiple addresses, this property defines the country of the customer's address.
CustomerCounty	Text	Null	Fairfax County	Since a customer can have multiple addresses, this property defines the county of the customer's address.
PrimaryAddress	Boolean	FALSE	TRUE	Indicates whether the address is primary or not.
CustomerAddressType	Text	NA	Work, Home, Other, etc.	Type of address.
CustomerGeoCode	Text	NA	78901	Since a customer can have multiple addresses, this property defines the zip code
RemoveCustomerAddress	Boolean	FALSE	FALSE	Remove the customer's address.

Name	Type	Default	Sample Value	Description
EffectiveStartDate	Date	NA	NA	Date from which the record should be active in the system.
RemovedStarting	Date	NA	NA	Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA	NA	Date from which the record will be inactive in the system.
LastUpdatedDateFrom	Date	NA	NA	System date on which the last change was made to the record.
CustomerLatitude	Numeric	42.050279	42.050279	Default value from configuration setting
		1	1	
CustomerLongitude	Numeric	-87.682199	-87.682199	Default value from configuration setting
		8	8	
EligibleForAlignment	Boolean	FALSE	FALSE	This column will decide if the address can be used for generating ZIP based alignment.

Country Changes

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

Product Changes

Name	Type	Default	Sample Value	Description
ProductId	Text	NA	AGE 1	Defines the unique identifier of the product to be added in the system.
ProductName	Text	NA	Agen	Name of the product to be added to the system.
RemoveProduct	Boolean	FALSE	FALSE	Remove the product from the system.
EffectiveStartDate	Date	NA	NA	Date from which the record should be active in the system.
RemovedStarting	Date	NA	NA	Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA	NA	Date from which the record will be inactive in the system.
LastUpdatedDateFrom	Date	NA	NA	System date on which the last change was made to the record.

Level Changes

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

Team Changes

Name	Type	Default	Sample Value	Description
TeamId	Text	NA	TT1	Defines the unique identifier of the team to be added in the system.
TeamName	Text	NA	Primary Care	Name of the team to be added in the system.
LowestLevelId	Text	Null/Empty	1	Allows user to define the Level Id from which the levels are to be mapped with the team.
TeamEnableSharedAlignment	Boolean	FALSE	FALSE	Allows creation of Shared Alignments within the team.
TeamEnableAlignmentWeightSumNotEqualTo 100	Boolean	FALSE	FALSE	Allows weight less than or greater than 100 in case of Shared Alignment.
AllowAlignmentAttribute	Boolean	TRUE	TRUE	Allows user to define if Alignment attribute is supported in the team.
AllowCustomerBasedAlignment	Boolean	TRUE	FALSE	Allows user to define if Customer based Alignments are supported in the team.
RemoveTeam	Boolean	FALSE	FALSE	Remove the team from the system.
EffectiveStartDate	Date	NA	NA	Date from which the record should be active in the system.
RemovedStarting	Date	NA	NA	Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA	NA	Date from which the record will be inactive in the system.
LastUpdatedDateFrom	Date	NA	NA	System date on which the last change was made to the record.
AllowDeltaOperationviaUIBRMSscenarioPublish *	Boolean	FALSE	FALSE	
AllowProductLevelAlignment *	Boolean	TRUE	TRUE	Allows users to define if product level alignment is supported in the team. Note: 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'
TeamEnableProductAllocationWeightSumNotEqualTo100 *	Boolean	FALSE	FALSE	Allows users to enable when product allocation weight sum not equal to 100
AllowGeoBasedAlignment *	Boolean	TRUE	FALSE	Allows user to

Name	Type	Default	Sample Value	Description
				define if WorkUnit based Alignments are supported in the team. If users enable this flag, then they need to provide GeoTypeld (by default, zip will be the GeoTypeld).
GeoTypeld *	Text	ZIP	ZIP1	Id of the type of Geo being created.
AffiliationEnabled *	Boolean	FALSE	FALSE	Allows user to define if Affiliation is supported in the team.



Note: If you are using an integrated instance with **Field Deployment**, fields marked with an asterisk (*) are mandatory.

Role Category

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

Role Changes

Name	Type	Default	SampleValue	Description
RoleId	Text	NA	1	Defines the unique identifier of the role to be added in the system.
RoleName	Text	NA	PCP2 Rep	Name of the role to be added in the system.
RoleCategoryId	Text	NA	PCP2	Defines the unique identifier of the category for the specific role.
RemoveRole	Boolean	FALSE	FALSE	Remove the role from the system.
EffectiveStartDate	Date	NA	NA	Date from which the record should be active in the system.
RemovedStarting	Date	NA	NA	Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA	NA	Date from which the record will be inactive in the system.

Name	Type	Default	SampleValue	Description
LastUpdatedDateFrom	Date	NA	NA	System date on which the last change was made to the record.

Employee Changes

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

Name	Type	Required	Sample Value	Description
LastUpdatedDateFrom	Date	NA		System date on which the last change was made to the record.

Work Unit Changes

Name	Type	Default	SampleValue	Description
WorkUnitId	Text	NA	9A99999	Defines the unique identifier of the Work Unit to be added in the system.
WorkUnitName	Text	NA	PCP2	Name of the Work Unit is to be added in the system.
WorkUnitParentId	Text	NA	Unassigned	Defines the unique identifier of the parent Work Unit to be added in the system.
LevelId	Text	NA	11	Defines the unique identifier of the Work Unit level to be added.
RemoveWorkUnit	Boolean	FALSE	FALSE	Remove the Work Unit from the system.
WorkUnitType	Text	NA	Field /Home Office	A type of Work Unit to be added in the system.
RoleId	Text	NA	5	Defines the unique identifier of the role to be assigned in the Work Unit.
EffectiveStartDate	Date	NA	4-4-2025	Date from which the record should be active in the system.
RemovedStarting	Date	NA	5-4-2025	Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA	4-4-2025	Date from which the record will be inactive in the system.
LastUpdatedDateFrom	Date	NA	5-4-2025	System date on which the last change was made to the record.
InternalWorkUnitId	Text	NA	66432	Unique system generated Id.
parentworkunitinternalid	Text	NA	NA	Unique system generated Id.
CountryId	Text	NA	BRZ	Defines the unique identifier of the country to be added in the system.

Name	Type	Default	SampleValue	Description
BusinessUnitId	Text	NA	GP	Defines the unique identifier of the business unit to be added in the system.
LastApprovedDate	Date	NA	5-6-2025	System date on which the change was approved

Team to Customer Type

Name	Type	Default	Sample Value	Description
TeamId	Text	NA	TT1	Defines the unique identifier of the team to be added to the customer type in the system.
AllowProductLevelAlignment	Boolean	NA	FALSE	Allow users to define if product level alignment is supported in the team. Note: By default, the value is set to 'False.' Once the user changes this value to 'True,' it cannot be reverted to 'False'
CustomerTypeId	Text	NA	2	Id of the customer type to which the team will be added.
RemoveMapping	Boolean	FALSE	FALSE	Remove the team from the customer type mapping.
EffectiveStartDate	Date	NA	NA	Date from which the record should be active in the system.
RemovedStarting	Date	NA	NA	Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA	NA	Date from which the record will be inactive in the system.
LastUpdatedDateFrom	Date	NA	NA	System date on which the last change was made to the record.

Level to Role Changes

Name	Type	Default	Sample Value	Description
LevelId	Text	NA	1	Defines the unique identifier of the level to be added to the role mapping in the system.
RoleId	Text	NA	A001	Defines the unique identifier of the role to which the level will be added.
UsesEffort	Boolean	FALSE	FALSE	
RemoveMapping	Boolean	FALSE	FALSE	Remove the level from the role mapping.
EffectiveStartDate	Date	NA	NA	Date from which the record should be active in the system.
RemovedStarting	Date	NA	NA	Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA	NA	Date from which the record will be inactive in the system.
LastUpdatedDateFrom	Date	NA	NA	System date on which the last change was made to the record.

Level to Country Changes

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

Employee Assignment Changes

Name	Type	Default	Sample Value	Description
EmployeeAssignmentId	Text	NA	06001A	Defines the unique identifier of the assignment to be added and assigned to the Employee in the system.
WorkUnitId	Text	NA	1A0301C	Defines the unique identifier of the Work Unit to be added for assignment.
WorkUnitInternalId	Text	NA	1E+07	Defines the unique identifier of the Work Unit Internal to be added for assignment.
EmployeeId	Text	NA	35	Defines the unique identifier of the employee who will be owning the assignment.
Effort	Decimal	100	100	Time to complete the assignment.
RemoveEmployeeAssignment	Boolean	FALSE	FALSE	Remove the assignment from the system.
PrimaryAssignment	Boolean	FALSE	FALSE	Defines the unique identifier of the primary assignment being created.
StartDate	Date	NA	01/01/2018	Effective Start date of the assignment.
EffectiveEndDate	Date	End Date of the Work Unit must be considered as default value when empty.	01/01/2018	Effective End date of the assignment.
EffectiveStartDate	Date	NA	NA	Date from which the record should be active in the system.
RemovedStarting	Date	NA	NA	Date from which the record will be deleted/removed from the system.
LastUpdatedDateFrom	Date	NA	Backfill	System date on which the last change was made to the record.
AssignmentContext	Text	NA	NA	Defines the unique identifier of the AssignmentContext to be added in the system.
LastApprovedDate	Date	NA		System date on which the change was approved

Product Assignments

Name	Type	Default	SampleValue	Description
ProductId	Text	NA	CHA 31	Defines the unique identifier of the product assignment to be added in the system.
WorkUnitId	Text	NA	9A99999	Defines the unique identifier of the Work Unit to be added for product assignment.
WorkUnitInternalID	Text	NA	10000189	Defines the unique identifier of the Work Unit internal ID to be added for assignment.
ProductAssignmentWeight	Decimal	NA	33.33	Stores information about the product assignment weight percent in the system.
RemoveProductAssignment	Boolean	FALSE	FALSE	Remove the product assignment from the system.
EffectiveStartDate	Date	NA	NA	Date from which the record should be active in the system.
RemovedStarting	Date	NA	NA	Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA	NA	Date from which the record will be inactive in the system.
LastUpdatedDateFrom	Date	NA	NA	System date on which the last change was made to the record.
LastApprovedDate	Date	NA	NA	System date on which the change was approved

Product Assignment Changes (Applicable only for DR instances)

Name	Type	Default	SampleValue	Description
ProductId	Text	NA	CHA 31	Defines the unique identifier of the product assignment to be added in the system.
WorkUnitId	Text	NA	9A99999	Defines the unique identifier of the Work Unit to be added for product assignment.
WorkUnitInternalId	Text	NA	10000189	
PositionReferenceID	Text	NA	CD93	Defines the unique identifier of the Position Reference ID to be added for assignment
PositionID	Text	NA	AE93	Defines the unique identifier of the Position to be added for assignment
ProductAssignmentWeight	Text	NA	FALSE	Defines the unique identifier of the product assignment weight for the given assignment
RemoveProductAssignment			FALSE	Remove product assignment from the system
EffectiveStartDate	Date	NA	NA	Date from which the record should be active in the system
RemovedStarting	Date	NA	NA	Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA	NA	Date from which the record will be inactive in the system
LastUpdatedDateForm	Date	NA	NA	Date from which the record will be updated from the system

Name	Type	Default	SampleValue	Description
LastApprovedDate	Date	NA	NA	System date on which the change was approved

Work Unit Relationship Changes

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

Custom Fields LOV

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
CustomFieldId	Text	CS01	Primary identifier for Custom Field created
CustomFieldDisplayName	Text	Eligible for Sample	Display name of Custom field
DataType	Text	Boolean	Type of Custom field. (Text, Numeric, Date & Boolean)
ObjectName	Text	Customer	Name of the object for which custom field is created
Description	Text	NA	Details of custom field created
AllowSharingSplitting	Boolean	TRUE	Applicable for Only Numeric Field
SpecialCharacterAtBeginning	Boolean	TRUE	Applicable for Numeric and Text custom field
SpecialCharacter	Text	“\$”	Supported by only Text & Numeric DataType
NumberDecimalRoundto	Number	2	values will be: 0 – No decimal places. The value will be rounded to the nearest whole number. <i>Example:</i> 129.98 → 130 1 to 5 – Number of decimal places to retain. The value will be rounded accordingly. <i>Example:</i> 129.9876 with a value of 2 → 129.99
NumberShowCommaSafterevery	Number	2	Allowed values between 1-5
CommaatBeginning	Boolean	FALSE	Flag to Show commas-based numbers provided in NumberShowCommaAfterEvery field.
AllowUiEditability	Boolean	FALSE	This field is applicable for Employee and employee assignment objects
ismandatoryfield	BooleaSn	FALSE	This field is applicable for Employee object only
isloffield	Boolean	FALSE	This field is applicable for Employee objects with Datatype as text only

Name	Type	Sample Value	Description
EmailFormatCheck	Boolean	FALSE	This field is applicable for Employee objects with Datatype as text only
Endswith	Text	@zs.com	This field is applicable for Employee objects and DataType as text.
LimitToScenario	Boolean	FALSE	Restrict Scenario in scenario mode
RemoveCustomfield	Boolean	FALSE	Flag to remove Custom Field
EffectiveStartDate	Date	5/1/2025	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 (Customer 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.
RemoveCustomFieldRoleVisibility	Date	FALSE	Flag indicating whether to remove the custom field visibility for the specified team and role.
EffectiveStartDate	Date	5/1/2025	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	SampleValue	Description
CustomFieldId	Text	CS01	CustomField id for which customer type visibility is to be provided
CustomerTypeId	Text	IDN	Customer type for which visibility is to be provided
RemoveCustomFieldCustomerType	Boolean	NA	Flag To remove custom field to Customer type mapping
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.

Custom Field Visibility Changes (Application)

Name	Type	Sample Value	Details
Custom Field ID	Text	Age	Custom Field Id for which visibility is to be updated.
Application	Text	Call Planning, Deployment, Segmentation	Application for which visibility is to be updated.

Custom Field Visibility Changes (Configs)

Name	Type	Sample Value	Details
Custom Field ID	Text	Age	Custom Field Id for which visibility is to be updated.
Config	Text	cp.filter, cp_segment	Enables visibility for Filter and/or Segment configurations within the Call Plan Generation workflow. Currently, only cp.filter and cp_segment are supported for Call Plan.

Customer Custom Fields

Name	Type	Sample Value	Description
CustomerId	Text	A00003G3	A unique identifier that represents the customer.

Name	Type	Sample Value	Description
CustomFieldID1 (e.g.: Specialty)	Text	Oncology	Contains values for custom fields (e.g., Specialty). There can be 'n' number of custom fields.
RemoveCustomer	Boolean	FALSE	It indicates whether the customer should be removed from the system.
EffectiveStartDate	Date	YYYY-MM-DD	The date when the record becomes active in the system.
RemovedStarting	Date	YYYY-MM-DD	The date when the record is marked as removed from the system.
EffectiveEndDate	Date	YYYY-MM-DD	The date when the record becomes inactive in the system.
LastUpdatedDateFrom	Date	YYYY-MM-DD	The date when the last update was made to the record.

Customer Team Metric

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

Customer Product Custom Metric

Name	Type	SampleValue	Description
CustomerID	Text	A000G3	Unique Identifier for Customer
ProductID	Text	P1003V	Unique Identifier for Product
CustomFiledID	Text	Segmentation	
EffectiveStartDate	Date	1 Jan 2020	Effective start date of the record(s) from which the data can be exported.
EffectiveEndDate	Date	31 Jan 9999	Effective end date of the record(s) from which the data can be exported.
LastUpdatedDate	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
CustomerAddressId	Text	CS001	Unique Customer Address Id
CustomerId	Text	CS001_1A	Defines the unique identifier of the customer being created.
CustomField1	Text	KaiserFlag	Custom Field names
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	02/03/2025	System date on which the last change was made to the record.

Time Period

Name	Type	Sample Value	Description
TimePeriodId	Text	Q1_2025	Unique identifier of the time period.
TimePeriodName	Text	Q1 2025	Name of the time period.
EffectiveStartDate	Date	1/1/2025	Start date of the time period.
EffectiveEndDate	Date	3/31/2025	End date of the time period.

Relationship Type Changes

Name	Type	Default	Sample Value	Description
RelationshipTypeId	Text	NA	R1	Defines the unique identifier of the relationship type to be added based on the data contract.
RelationshipTypeName	Text	NA	Managed	Name of the relationship type to be added based on the data contract.
RemoveRelationshipType	Boolean	FALSE	FALSE	Remove the relationship type from the system.
EffectiveStartDate	Date	NA		Date from which the record should be active in the system.
RemovedStarting	Date	NA		Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA		Date from which the record will be inactive in the system.
LastUpdatedDateFrom	Date	NA		System date on which the last change was made to the record.

Affiliation Group Configuration Changes

Name	Type	Default	Sample Value	Description
AffiliationGroupID	Text	NA	Config1	Defines the unique identifier for each Affiliation Group Configuration.
AffiliationGroupName	Text	NA	For IDNs	Captures the name of the configuration.
Description	Text	Null/Empty	Applicable for teams with IDN	Captures a short description about the Configuration.
RemoveAffiliationGroup	Boolean	FALSE	FALSE	Removes the Affiliation Group Configuration from the system.
EffectiveStartDate	Date	NA		Date from which the record should be active in the system.
RemovedStarting	Date	NA		Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA		Date from which the record will be inactive in the system.
LastUpdatedDate	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
ParentCustomerID	Text	NA	CID1	Parent/ Driving Customer ID.
ChildCustomerID	Text	NA	CID2	Child/ Associated Customer ID.
RelationshipTypeID	Text	NA	R1	Describes the relationship type between the two customers.
RemoveAffiliationNetwork	Boolean	FALSE	FALSE	Remove the Affiliation Network from the system based on the data contract.
EffectiveStartDate	Date	NA		Date from which the record should be active in the system.
RemovedStarting	Date	NA		Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA		Date from which the record will be inactive in the system.
LastUpdatedDate	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
AffiliationGroupID	Text	NA	Config1	Defines the unique identifier for each Affiliation Group Configuration.
RelationshipTypeID	Text	NA	R1	Defines the unique identifier for the Relationship type to be used for Affiliation Group Configuration mapping.
RemoveMapping	Boolean	FALSE	FALSE	Removes the Affiliation Group Configuration from the system.
EffectiveStartDate	Date	NA		Date from which the record should be active in the system.
RemovedStarting	Date	NA		Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA		Date from which the record will be inactive in the system.
LastUpdatedDate	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
AffiliationGroupId	Text	NA	Config1	Defines the unique identifier for each Affiliation Group Configuration.
TeamId	Text	NA	R1	Defines the unique identifier for the team to be used for Affiliation Group Configuration mapping.
RemoveMapping	Boolean	FALSE	FALSE	Removes the Affiliation Group Configuration from the system.
EffectiveStartDate	Date	NA		Date from which the record should be active in the system.
RemovedStarting	Date	NA		Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA		Date from which the record will be inactive in the system.
LastUpdatedDate	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
AffiliationGroupID	Text	NA	Config1	Defines the unique identifier for each Affiliation Group data.
ParentCustomerID	Text	NA	CID1	Parent/ Driving Customer ID.
ChildCustomerID	Text	NA	CID2	Child/ Associated Customer ID.
RelationshipTypeId	Text	NA	R1	Relationship between ParentCustomerId and ChildCustomerId.
RemoveAffiliationGroup	Boolean	FALSE	FALSE	Remove the Affiliation Group data from the system.
EffectiveStartDate	Date	NA		Date from which the record should be active in the system.
RemovedStarting	Date	NA		Date from which the record will be deleted/removed from the system.
EffectiveEndDate	Date	NA		Date from which the record will be inactive in the system.
LastUpdatedDate	Date	NA		System date on which the last change was made to the record.

Export Summary API

This API is used to poll the status of an export request and provides access to the generated export file.

Type: GET

URL: {baseUrl}/{instance}/file/ExportSummary?JobId={jobId}

Endpoint: /file/ExportSummary

Query Parameters

Name	Type	Required	Sample Value	Description
JobId	Text (string)	Yes	abc123	Job identifier returned by the Export API.

Response Body: application/JSON

```
{
  "StartTime": "2025-03-27 07:05:33.4532",
  "Status": "Success",
  "IsSuccess": true,
  "FailureMessage": "",
  "totalTask": 1,
  "successTask": 1,
  "RunTimeTicks": 1280000,
  "ExportFilePath": "s3://aws-a0078-use1-00-q-s3b-shrd-spm-ext01/out/seg-
x/exports/abc123/"
}
```

Response Parameters

Name	Type	Sample Value	Description
StartTime	Text (timestamp)	2025-03-27 07:05:33.4532	Start time of export.
Status	Text	Success	Status of export job.
IsSuccess	Boolean	true	Indicates whether exports completed successfully.
FailureMessage	Text	""	Failure reason if any.
totalTask	Integer	1	Total tasks executed.
successTask	Integer	1	Number of successful tasks.
RunTimeTicks	Integer	1280000	Execution time in system ticks.
ExportFilePath	Text	s3://aws-a0078-use1.../out/seg-x/exports/{jobId}/	Path to the exported file in S3.

Performance Stats and Supported Volume

Initial Setup - Records Supported for Bulk Import

This table defines the initial set of records (instance level) that are supported for bulk imports in the system during the initial configuration.

Objects	Maximum No. of Records
Country	150
Customer Type	3
Customers in the universe	5,500,000
Customer Address	9,500,000
Customer Alignment	33,000,000
Products	40,000
Teams	360
Team to Customer Type	720
Work units	6,000
Employee	47,000
Employee assignments	50,000 for Non-DR instance; 32,000 for DR instance
Hierarchy levels	2,000
Work Unit Relationship	100,000
Roles	400
Role to Product	22,000
Role Category	122
Level to Role	4,500
Level to Country	80
Time Periods	8
Product Assignments	300,000
Positions	30,000
Custom Field Config Visibility	800
Custom Field Application Visibility	400
Custom Fields	600
Custom Field Team Role visibility	350,000
Custom Field Team Customer Type visibility	500

Objects	Maximum No. of Records
Customer Custom Field	15,000,000
Customer Product Field	1,000,000
Customer Team Custom Field	12,000,000
Customer Address Custom Field	1,000,000
Product Custom Field	36,000
Channels	100
Team to Channel	3,000
Call Plan Team Setting	360
Team to Customer Type Call Planning	720
Reason Code	100
Team to Reason Code	3,000
Team Default Capacity	360
Work Unit Override Capacity - Non-DR	500
Work Unit Override Capacity - DR	500
Team to Product	3,000
Aggregated Segment LOV	2,500
Call Plan Base	1,400
Call Plan Customer (per call plan)*	900,000
Call Plan Aggregated Segment (per call plan)*	650,000
Call Plan Product Lineup (per call plan)*	900,000
Call Plan Channel Activity (per call plan)*	720,000



Note: Objects marked with (*) indicate that the import file supports the following numbers per call plan only for one team.

Delta Changes - Maximum Records Supported for Bulk Import

This table specifies the maximum allowable changes (additions, edits, deletions) for delta bulk imports.

Object	Add	Edit	Remove
Customer	85,000	85,000	10,000
Customer Attribute	60,000	60,000`	NA
Customer Alignment	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
Customer Address	190,000	190,000	10,000
Customer Team Attributes	100,000	100,000	NA
Customer Product Attributes	100,000	100,000	NA
Level	20	20	5
Level to Role	1,000	1,000	1,000
Position	5,000	5,000	1,000
Product	5,000	5,000	5,000
Product Assignment	20,000	20,000	20,000
Role to Product	2,000	1,000	100
Role Category	10	10	2
Role	200	200	100
Team	50	50	5
Team to Customer type	25	20	5
Work Unit	500	500	50
Work Unit ID	NA`	200	NA
Work Unit Relationship	1,000	1,000	1,000
Time Period	8	8	4

Maximum Custom Field Values

This table outlines the maximum custom field capacity for specific objects within the system.

Objects	Maximum Custom Field Volume
Customer	300 (Numeric, Boolean, Text, Date: 75 each)
Customer Product	32
Customer Team	15
Customer Address	20 (Numeric, Boolean, Text, Date: 5 each)
Product	15

In-App Processing Limits

This table defines maximum limits for records and various conditions that can be processed simultaneously within the application.

Entity	Max Records for a Team
No. of Customer Alignment for Call Plan Scenario (Customer Alignment Universe)	2,500,000
No. of Customer for Scenario Execution (Filter Universe)	2,000,000
No. of Products	15
No. of Channels	8
No. of Filter Conditions in Scenario	Primary Level: 10; Secondary Level: 5
No. of Attributes for creating aggregated segment	4 attribute selection
No. of Distinct values of an attribute for creating aggregated segment	7
No. of Aggregated Segments in a Call Plan Scenario	20
No. of Work units	800
No. of Work units Overrides via UI	800

Entity	Max Records for a Team
No. of Records for uploading aggregated segment for products (Call Plan Generation)	160
No. of Records for uploading call frequencies for products (Call Plan Generation)	160
No. of Positions at a work unit	20
No. of Max scenarios (Draft) for a Team-Cycle combination	10
No. of Max Scenarios (Published) in System	1
No. of Guardrails execution supported for a Work Unit	10
No. of Bulk Add Multiple Customers	50
No. of Records in Call Plan View (for Customer Type)	300
No. of Records in Call Plan View (for Download across all customer Types)	500
No. of Customer in All tab section for Add Customer - Rep view	5,000,000
Max scenarios in draft state for past 2 years (one year previous + present)	10
No. of custom fields columns enabled through column configurator in rep view	5
No. of columns that can be pinned through column configurator in rep view	3

User Support Limits

This tables specifies the number of users supported for different operational roles and simultaneous operations within the system for Call Plan Refinement and Call Plan Generation respectively

Operation	User Supported	Comments
Total users	1100	For Call Plan Refinement
Simultaneous User Logins	40	The system is designed and benchmarked to handle up to 40 simultaneous users logging in during the same hour subject to other operations on the instance
Simultaneous Users with Read Operations	15	15 users can perform Read operations simultaneously over the course of an hour. Read operations generally involve Filters, Navigations etc.
Simultaneous Users Performing Write/Change Operations	25	Up to 25 users can perform write operations over the course of an hour. This typically refers to actions such as adding channel frequencies, Add customer, etc.

Operation	User Supported	Comments
Total users	50	For Call Plan Generation
Simultaneous User Logins	10	The system is designed and benchmarked to handle up to 10 simultaneous users logging in during the same hour subject to other operations on the instance
Simultaneous Users with Read Operations	5	5 users can perform Read operations simultaneously over the course of an hour. Read operations generally involve view call plans, summaries, etc.
Simultaneous Users Performing Write/Change Operations	5	Up to 5 users can perform write operations over the course of an hour. This typically refers to actions such as setting up call plans, aggregated segments, adding frequencies, etc.

Maximum Records Supported During File Export

The following detailed records are supported during file exports per object.

Object	Records
Customer Type	3
Customer	5,500,000
Customer Address	9,500,000
Country	150
Product	35,000
Level	1,994
Team	360
Role	400
Role Category	122
Employee	47,000
Work Unit	6,000
Team–Customer Type	720
Level–Role	4,500
Level–Country	80
Role–Product	28,025
Product Assignment	300,000
Position	30,000
Employee Assignment	32,100
Customer Alignment	33,000,000
Work Unit Relationship	100,000
Time Period	8
Custom Field Config Visibility	800
Custom Field Application Visibility	400
Custom Fields	600
Custom Field Team Role visibility	350,000
Custom Field Team Customer Type visibility	500
Customer Custom Field	15,000,000
Customer Product Field	1,000,000
Customer Team Custom Field	12,000,000
Customer Address Custom Field	1,000,000

Object	Records
Product Custom Field	36,000
Channel	100
Team to Channel	3,000
Reason Code	100
Team to Reason Code	3,000
Call Planning Team Setting	360
Team to Customer Type Call Planning	720
Team to Product	3,000
Team Default Capacity	360
Work Unit Override Capacity – Non-DR	500
Work Unit Override Capacity - DR	500
Aggregated Segment List of Values	2,500
Call Plan Base	1,400
Call Plan Customer	600,000
Call Plan Aggregated Segment	179,000
Call Plan Product Lineup	600,000
Call Plan Channel Activity	1,200,000
Workunit Approval Request	500
Call Plan Export - Aggregation	520,000

Maximum Records Supported for a Work Unit

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

Objects	Full volume in the system
Maximum number of reps	30
Max number of Customers Alignment	310,000
Max number of Accounts, HCO (any other type of customers)	170,000
Number of Channels	10
Number of Aggregated Segments	15
Maximum number of Products/Customer	10
Max Positions in a Work Unit (DR use case)	20

