Data Requirements

# General Concepts

There are three main concepts in an integration: fetching the initial data, mapping it to the correct schema in Dear Lucy and keeping it up-to-date.

## Data Interpretation

Each row in a CSV or database is an independent unit of data, other rows do not affect how it is interpreted.

## Initial Data

Initial data is fetched from the beginning of the previous year up to the current date. There should be a way to retrieve this range of data when needed, eg. if there have been significant changes to the contents of the data that require all of it to be re-imported.

## Updates to Existing Data

Each unit of data should have a unique ID so that it can be updated with new information when needed. There should be a method to fetch the latest changes to data.

## Deletion of Existing Data

Deleted data in the source system should also be marked as deleted in the transferred data. This should use the same unique ID which is used to update existing data.

# Schemas

## Sales Cases

**Mandatory**

id text PRIMARY KEY,

close\_date date,

expected\_value real,

name text,

open\_date date,

probability real,

state text (funnel state),

status text (won, lost, open),

value real,

sales\_person text,

updated\_at timestamp,

lost\_reason text

**Optional**

active boolean,

business\_unit text,

competitor text,

country text,

customer text,

customer\_type text,

deal\_type text,

lead\_source text,

product text,

region text,

sales\_person text,

state\_change\_date date,

team text,

updated\_at timestamp without time zone,

lost\_reason text

## Activities (optional)

**Mandatory**

id text PRIMARY KEY,

active boolean,

completed\_date date,

created\_date date,

date date,

description text,

owner text,

type text

**Optional**

company text,

owner\_id text,

source text,

business\_unit text,

category text,

contact text,