Company Fields

Field Name	Description	Examples	Setup Location	Interaction with other field?
Company Role (Member)	Defines the role of a company in a relationship between companies. This is the drop down list for choosing Role of companies when defining a relationship between two companies. For example: Acme Corporate would be parent company, and Maynard, Inc would be a Division or Unit.	Consulting, Division, Headquarter, Subsidiary	In Company group select Company Member	No – used on Relationships tab
Company Name Normalization	Links abbreviations such as 'comp' to standard full words like 'company'	Corporation, Corp	In Company group select Company Name Normalization	No-most Users do not modify this table
Profile	Use Company Profile to categorize groups of companies, or profile companies, by industries or types of business. Categorize a company by industry or any other category we want to include. Can be more than just company categories. Can be vendor or competitor categories too.	Health, Legal, Pharmaceutical, technology	In Company group select Company Profile	No
Relationship	The Relationships tab lists a company's relationships with OTHER companies. Relationships are not the same as the Divisions, which links companies that are part of the same organizational structure. List a company's competitors or other types of relationships on the tab. This is the Relation Type field when defining a relationship between companies. It specifies the type of relationship.	Business, competitor, corporation, organization, partner	In Company group select Company Relationship Setup	No, but used together with Company Role.

	For example, the relationship between Acme Industries and Maynard, Inc Dallas could be a Business relationship.			
Role	Describes the role a Contact has within their Company. This assumes that the contact is associated with a company. To see where this field is used in the Contact: Once contact is saved, click the drop down in the Company field, and then click the Edit (pencil image) button, which will bring up a window where Role is one of the options	Board Member, Reseller, manufacturer, consultant	In Company group select Company Role	No, but used together with Company Relationship
Status	Use Company Status to identify the current state of the company. Enter multiple status codes. This field setup offers an 'IS-ACTIVE' option. 'IS ACTIVE' should only be used for existing paying customers that are active. Most CRM users limit this category to Active (Is Active), Inactive, Prospect.	Active, Inactive, Prospect-Hot, Prospect-Cold	In Company group select Company Status	No
Type	This defines the type of relationship the company has with your company. How are you dealing with them? Designates major category for Companies. NOTE- Competitor is a required Company Type if you want to record information about your Competitors.	Competitor, Active Customer, Do Not Call, Business Partner, Vendor	In Company group select Company Type	No
Contracts	On the Company Profile tab, you can link a Company to one or more type of Contracts that you have negotiated with them.	Extended, Gold, Standard Maintenance, Trial	In Company group select Contract Type	No, but used with Contract Status

Contract Status **(found in Contract Edit window)**	If a Contract is linked to a Company, you can indicate the current status of that Contract	Active, Cancelled, Expired, Hold	In Company group select Contract Status	No, but used with Contract Status
NAICS	The North American Industry Classification System replaced the U.S. Standard Industrial Classification (SIC) system.	This list is preloaded with the correct NAICS codes for you	In Company group select Company Member	No, most users do not modify this Industry standard list.

Contact Fields

Field	Description	Examples	**Setup Location**	**Interaction with other field?**
Contact Role (Member)	Identifies the role of a contact in a relationship with another contact.	Business, Family, Personal, Professional	In Contact group select Contact Member	No – used on Relationships tab with Relationship Type
Relationship Type	Used on Relationship tab, this defines the Type of relationship that exists between contacts.	Business, family, personal, professional	In Contact group select Contact Relationship Setup	No – used on Relationships tab with Contact Role (Member)
Contact By	Identifies the contact's preference for corresponding with your company.	eMail, Letter, Do not contact, telephone call	In Contact group select Contact Method	No
Status	Identifies the current state or position of the contact. Enter multiple status codes. Use the IsActive checkbox to indicate if this value means that the Contact is Active. Use the Active column to indicate whether this value is Active/displayed in drop down or not.	Active, Inactive	In Contact group select Contact Status	No
Department	Identifies the department for this contact at their organization. Also used to define Departments for CRM Users. Use checkbox to indicate if the value is available for Contact Department and/or User Department.	Accounting, legal, engineering, Information Technology	In Contact group select Department	No-this is displayed when editing the Company info linked to the Contact.
Internal Title	Classifies the internal role of the contact in the Department of a company. A contact can have more than one company/contact	Chief Financial Officer, Manager, Sales Representative	In Contact group select Internal Title.	No-this is displayed under the Company name linked to the Contact.

	relationship. To access this field, click to edit the Company that is linked to the contact. To access this field, click to edit the Company that is linked to the contact.			
Nickname	Table linking common nicknames to actual full names. It is used is used to normalize contact first names to their proper name equivalent before calculating soundex values. This provides better duplicate matching when deduplication is run	This table is preloaded for you.	In Contact group select Nickname.	No. Most users do not modify this table.
Salutation	Define a formal prefix for a contact name. Its Description displays when contact information is merged during the Mail Merge.	Dr, Mrs, Mr, Ms	In Contact group select Salutation.	No.

Activity Fields

Activities are tasks that need to be performed by your company's representatives. Examples of activities are meetings, product demonstrations, sending email and making follow up telephone calls. You can schedule activities that are related to companies, contacts, opportunities and incidents, and you can schedule activities that are not related to an entity record.

Field	Description	Examples	Setup Location	Interaction with other field or settings?
Action	Defines the type of activity. Activities are the single, individual tasks that need to be performed by your company's representatives. Examples of Activities include a meeting, a product demonstration, sending an email and making a telephone call. You can schedule Activities that are related to companies, contacts, opportunities and incidents, and you can schedule activities that are not related to an entity record. When you do, these Activities appear on your To-Do list and/or Calendar Dashboard, until they are completed and saved with a Result code.	Email, phone call, conference call, appointment, letter	In the Activity group, select Action.	Result, Action Set, Chain, Cost Group and Groups (user).
Result	Result indicates how an activity was completed. **Results complete an activity and remove it from the user's To Do List.** Activities can have one or more Results	Sent, Left Message, Completed, Left Voicemail	In the Activity group, select Result.	Is considered the completion of an Activity and triggers the removal of an Activity from the To-Do list.
Other Settings	Description	Examples	Setup Location	Interaction with other field?
Action Set	Action Sets identify categories of Actions for a specific subset of users. They are used to limit the action codes available to a user's area of responsibility. **At least one Action Set must be set up** when you define an Activity. If all users use the same Actions, one Action Set must exist,	Accounting, Administration, Sales, Service	In the Activity group, select Action Set.	Action and User

	and all Actions should be assigned to it. Actions link to Action Sets on the Action Set tab on the Setup – Action window. Each user is assigned to one Action Set on the main form of the Setup – User window. This determines the activities the user can create.			
Action Type	Action Type is optional; use it to group Actions for reporting and querying purposes.	Send document, email, meeting, telephone call, web meeting	In the Activity group, select Action Type.	
Chain	You can add an Activity to follow one, thus creating a chain of events. This is triggered by the type of Activity and the result used to close it.	Call back in 1 week, call back in 2 weeks, Call back in 1 day, email marketing activities	In the Activity group, select Chain.	If desired, select a Chain to be triggered when you define the Result code(s) for an Activity
Cost Group	Some action codes have related costs that are automatically applied when you add the code to the activity. You can also enter costs manually.	Advertisement, Entertainment, Travel, Postage, Product Sample	In the Activity group, select Costs.	If desired, add one or more Cost Groups to an Activity (using the Costs tab) when you create an Activity.

Opportunity Record

Field	Description	Examples	**Setup Location**	**Interaction with other field?**
Status	Defines the current state or position of an opportunity. Select IsSold to cause the Status Code to update the Opportunity Status to Sold. Select IsLost to cause the Status Code to update the Opportunity Status to Lost.	Sold, Lost, in progress	In the Opportunity & Order group, select Opportunity Status.	Used in reports, dashboards and searches
Sales Method	Use **Methods** as best practices or established procedures that specify the manner in which sales opportunities and campaigns should be managed. Associate Milestones with Methods. **Milestones** are significant events or stages of campaigns and opportunities that should	Direct mail to Prospect	In the Opportunity & Order group, select Opportunity Method.	Milestones

	occur at specific times. Milestones also serve as reminders when related activities need to be performed. Set them up before setting up Methods.			
Stage	Use Opportunity Stage to set up the steps/stages a Sales Opportunity undergoes in your business process.		In the Opportunity & Order group, select Opportunity Stage.	Used in the Sales Dashboard Funnel
Priority	Denotes the priority associated with an opportunity	High, Medium or Low	In the Opportunity & Order group, select Opportunity Priority.	Used in Sales Dashboard and Saved Search for 'Hot Opportunities'
Interest	What product(s) or services are they interested in for this Opportunity? **Also can be defined for Contacts and Company records.**	Truck Bodies, Trailers, Tires	In the Miscellaneous Group, select Interest.	Interest Subgroup, Opportunity, Contact, Company
Interest Subgroup	Further define the product(s) or services are they interested in for this Opportunity. **Also can be defined for Contacts and Company records.**	Small Truck Bodies, 6' Trailers, 33x Tires, 35x tires	In the Miscellaneous Group, select Interest.	Interest Subgroup, Opportunity, Contact, Company
Reason(Lost)	If the opportunity was lost, what is the reason? Selected in Opportunity Profile tab.	Not in budget, found better price, looking for other features	In the Opportunity & Order Group, select Lost Reason.	No
Territory	Defines the Sales territory for this Opportunity.	This is selected from the Opportunity Profile tab.	In the User Group, select Territory.	Opportunity, User, Company
Source	Identifies the source for the lead-	(Comes from the Company record)	In the Campaign Group, select Source.	Campaign, Opportunity
Role	Describes the Role a given Contact plays in the Opportunity.	Advisor, Consultant, Decision Maker, Inactive, Influencer	Open the Contact record, and select to edit the Company that is linked to the Contact. An edit window offers the option to select Role.	Contact, Company, Opportunity
Milestones Tab	**Description**	**Examples**	**Setup Location**	**Interaction with other field?**
Milestones	You can manage your Sales process by defining Milestones which can be assigned to any Opportunity. The Milestones are the steps involved in the process, separated by the timeframes for completing them.	Contract Negotiation, Product Demonstration, Needs Analysis	In the Opportunity & Order Group, select Milestone.	Milestone Status, Recommended Activities

Milestone Status	As the Opportunity progresses along, the Sales Rep can adjust the status for each milestone to keep track of the progress.	Canceled, Completed, Not Started, In Progress	In the Opportunity & Order Group, select Milestone Status.	Milestones
Recommended Activities	If desired, you can list a set of Recommended Activities. This allows the Rep to quickly review and assign the recommended Activity records to the correct Users at the correct dates to ensure that the Opportunity is managed according to your ideal sales process.	Conference Call, Introductory meeting, Send Product info, Follow Up call	In the Opportunity & Order Group, select Milestone. Choose the Milestone that you want to add Recommended Activities for, and open it. Click New to add each Activity.	Milestones
Sales Order Tab	**Description**	**Examples**	**Setup Location**	**Interaction with other field?**
Status	Describes the current status for the Order	Cancelled, backordered, Shipped, Sold, On Hold, PO Received	In the Opportunity & Order Group, select Order Status.	Order
Order Terms	Describe the terms for the order	Cash on Delivery, Net 15 Days, Send Invoice, PO	In the Opportunity & Order Group, select Order Type.	Order
Order Type	Typically used to describe where the order originated from.	Mail, Internet, Phone	In the Opportunity & Order Group, select Order Type.	Order
Ship Via	Select the shipping method for the order	Mail, Standard Ground, 2 Day, Priority	In the Opportunity & Order Group, select Shipp Method.	Order
Products	When you create an Order, use the Products tab to list the Products to be included on the Order.	CUS Punch, STD Punch, BP-129 Single Processor	In the Opportunity & Order Group, select Product.	Order, Incident. Also used in reports and Dashboards.
Product Part	You can list all the parts associated with any given Product	USB adapter, Monitor Base, Extension cable, Drive	In the Opportunity & Order Group, select Product Part.	Product, Order, Incident
Manufacturer	Each Product can be linked to a Manufacturer if desired.	ABC Company, Acme Industrial	In the Opportunity & Order Group, select Manufacturer.	Product

User Records

Field	Description	Examples	Setup Location	Interaction with other field or settings?
Job Function	List the Job Functions for your Users.	Accounts Payable, Senior Sales	In the User Group, select	No

		Rep, Tier 2 CSR	Job Function.	
Department	List the Departments for your Users and your Contacts.	Accounting, Inside Sales, Customer Service, Engineering	In the Contact Group, select Department.	No
Territory	List the Territories that you use for Sales reps or other departments	Midwest, South, North East	In the User Group, select Territory.	Company, Contact, and used in reports and Dashboards
Devices	This list is automatically updated when a User successfully logs into the OnContact Mobile app.	Chrome Small Screen - Administrator	In the User Group, select Devices.	Do not modify
Login Profile Tab	**Description**	**Examples**	**Setup Location**	**Interaction with other field or settings?**
Action Set	Action Sets identify categories of Actions for a specific subset of users. They are used to limit the action codes available to a user's area of responsibility. At least one Action Set must be set up. If all users use the same Actions, one Action Set must exist, and all Actions should be assigned to it. Actions link to Action Sets on the Action Set tab on the Setup – Action window. Each user is assigned to one Action Set on the main form of the Setup – User window. This determines the activities the user can create.	Accounting, Administration, Sales, Service	In the Activity group, select Action Set.	Action and User
License Type	Choose the type of CRM license that is valid for this User.	Named, Concurrent	N/A	Required for use of CRM.
Groups Tab	**Description**	**Examples**	**Setup Location**	**Interaction with other field or settings?**
Group	Use the User Setup window Group tab to assign permissions to the user.	Administrator, Customer Service, Sales, Marketing	Click the System icon, and expand the Modules group. Select Edit Group.	User, Activity
Email Address	**Description**			**Interaction with other field**

		or settings?
Email	Each User must have at least one email address. If the User will be sending emails via a hosted CRM environment, select their email address and click the Register email button to activate it with Amazon server.	Email and email merge