

UPM Primary Entities and Relationships

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UPM 14.x

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UPM Primary Object Definitions

Prospect/Leads

A prospect/lead is a prospective client. Leads can emerge from real-life interactions, such as meeting someone at a conference, or they can come from online interactions, such as when someone fills out a form on your website requesting more information.

When you convert a lead in UPM, the system guides you through an integrated path of lead-nurturing through the creation of new accounts, contacts, opportunities and registered deals, while connecting that data with the information already in its system.

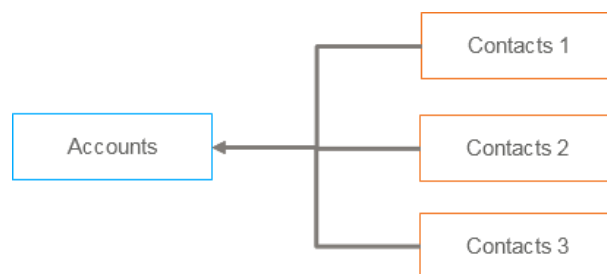
Contacts

Upon qualification, the lead is converted into a contact. A contact object contains information about the person associated with the lead. A contact is a person associated with an account. Data associated with a contact includes first name, last name, phone, email, etc.

Accounts

An account is an organization or person involved with your business such as a customer, competitor or partner.

To understand the Entity lets take the example of Accounts as the Primary Object and Contacts as the Secondary Object.



Multiple Contacts are related to a single specific Account.

Opportunities

Opportunities include all the information relating to specific sales, campaigns and pending deals. From this information you can easily create lists of various types, such as products, quotes or contacts. Like the account and contact fields, opportunity fields can be customized.

An opportunity normally refers to a sale or pending deal. Multiple opportunities make up the sales pipeline, which contributes to your sales forecast. Opportunities are an integral part of UPM, and it's essential to maintain up-to-date information about all of your opportunities to track progress and make accurate forecasts.

UPM Data Objects & Fields

Prospect Object

| Attributes | Attribute Data Type | Required |
|--|---------------------|----------|
| Prospect Id (PK) | auto identity | Yes |
| Prospect First Name | textbox | Yes |
| Prospect Last Name | textbox | Yes |
| Prospect Title | textbox | |
| Prospect Company Name | textbox | Yes |
| Lead Status | dropdown | |
| Prospect Email | email | Yes |
| Opportunity Value | textbox | |
| Prospect Source | dropdown | |
| No. of Employees in Prospect's Company | textbox | |
| Prospect Company Website | textbox | |
| Prospect Phone | textbox | |
| Competitor Name | textbox | |
| Competitor Description | textbox | |
| Competitor Strength | textbox | |
| Competitor Weakness | textbox | |
| Prospect Mobile | textbox | |
| Prospect Industry Type | textbox | |
| Prospect Annual Revenue | textbox | |
| Prospect Primary Address 1 | textbox | |
| Prospect Primary State | dropdown | |
| Prospect Primary Country | dropdown | |
| Prospect Primary City | textbox | Yes |
| Prospect Alternate Address 1 | textbox | |
| Prospect Alternate City | textbox | |
| Prospect Alternate Country | dropdown | |
| Prospect Alternate Zip / Postal Code | textbox | |
| Prospect Alternate State | dropdown | |
| Deleted | bit | |
| Created By | auto identity | Yes |

| | | |
|------------------|---------------|-----|
| Date Entered | datetime | |
| Modified User Id | auto identity | Yes |
| Date Modified | datetime | |

Contact Object

| Attributes | Attribute Data Type | Required |
|--|---------------------|----------|
| Contact Id (PK) | auto identity | Yes |
| Contact Title | textbox | |
| Contact First Name | textbox | Yes |
| Contact Last Name | textbox | Yes |
| Contact Phone | textbox | |
| Contact Status | textbox | |
| Contact Source - Source of the target contact information | dropdown | |
| Contact Mobile | textbox | |
| Assigned To - Target user who will be handling the contact | textbox | |
| Contact Type - Active or Dormant | dropdown | |
| Contact Email | email | Yes |
| Contact Primary Address 1 | textbox | |
| Contact Primary City | textbox | |
| Contact Primary Country | dropdown | Yes |
| Contact Primary State | dropdown | |
| Contact Primary Zip / Postal Code | textbox | |
| Contact Alternate Address 1 | textbox | |
| Contact Alternate City | textbox | |
| Contact Alternate Country | dropdown | |
| Contact Alternate State | dropdown | |
| Contact Alternate Zip / Postal Code | textbox | |
| Deleted | bit | |
| Created By | auto identity | Yes |
| Date Entered | datetime | |
| Modified User Id | auto identity | Yes |
| Date Modified | datetime | |

Account Object

| Attributes | Attribute Data Type | Required |
|---|---------------------|----------|
| Account ID (PK) | auto identity | Yes |
| Account Name | textbox | Yes |
| Account Type - The type of account with respect to the account name. Available account types are: 1. OEM 2. Distributor 3. Reseller 4. Alliance | dropdown | |
| Annual Revenue | textbox | |
| Currency ISO Code | textbox | |
| No. of Employees | textbox | |
| Industry - Target industry type | dropdown | |
| Ownership | textbox | |
| Website | textbox | |
| Headquarter Address Street | textbox | |
| Headquarter Office Phone | textbox | |
| Headquarter Address State | dropdown | Yes |
| Headquarter Address Country | dropdown | Yes |
| Headquarter Address City | textbox | Yes |
| Headquarter Address Postal Code | textbox | |
| Shipping Address Street | textbox | |
| Shipping Address City | textbox | |
| Shipping Address Postal Code | textbox | |
| Shipping Address State | dropdown | |
| Shipping Address Country | dropdown | |
| Deleted | bit | |
| Created By | auto identity | Yes |
| Date Entered | datetime | |
| Modified User Id | auto identity | Yes |
| Date Modified | datetime | |

Opportunity Object

| Attributes | Attribute Data Type | Required |
|--|---------------------|----------|
| Opportunity Id (PK) | auto identity | Yes |
| Opportunity Name | textbox | Yes |
| Sales Stage - Current stage of the sales. Choose one from the list of available sales stage: 1. Prospecting 2. ID Decision Makers 3. Perception Analysis 4. Qualification 5. Needs Analysis 6. Value Proposition 7. Proposal / Price Quote 8. Negotiation / Review 9. Closed Lost 10. Closed Won 11. PO Received 12. Other | dropdown | Yes |
| Primary Sales Account Name | lookup | Yes |
| Primary Sales Contact Name | lookup | Yes |
| Quarter | dropdown | |
| Currency ISO Code | dropdown | Yes |
| Price Book | lookup | |
| Estimated Amount | textbox | Yes |
| Estimated Close Date | date | Yes |
| Account Type - Target account type. Choose one from the list of available account types: 1. OEM 2. Distributor 3. Reseller 4. Alliance | textbox | Yes |
| Deleted | bit | |
| Created By | auto identity | Yes |
| Date Entered | datetime | |
| Modified User Id | auto identity | Yes |
| Date Modified | datetime | |

