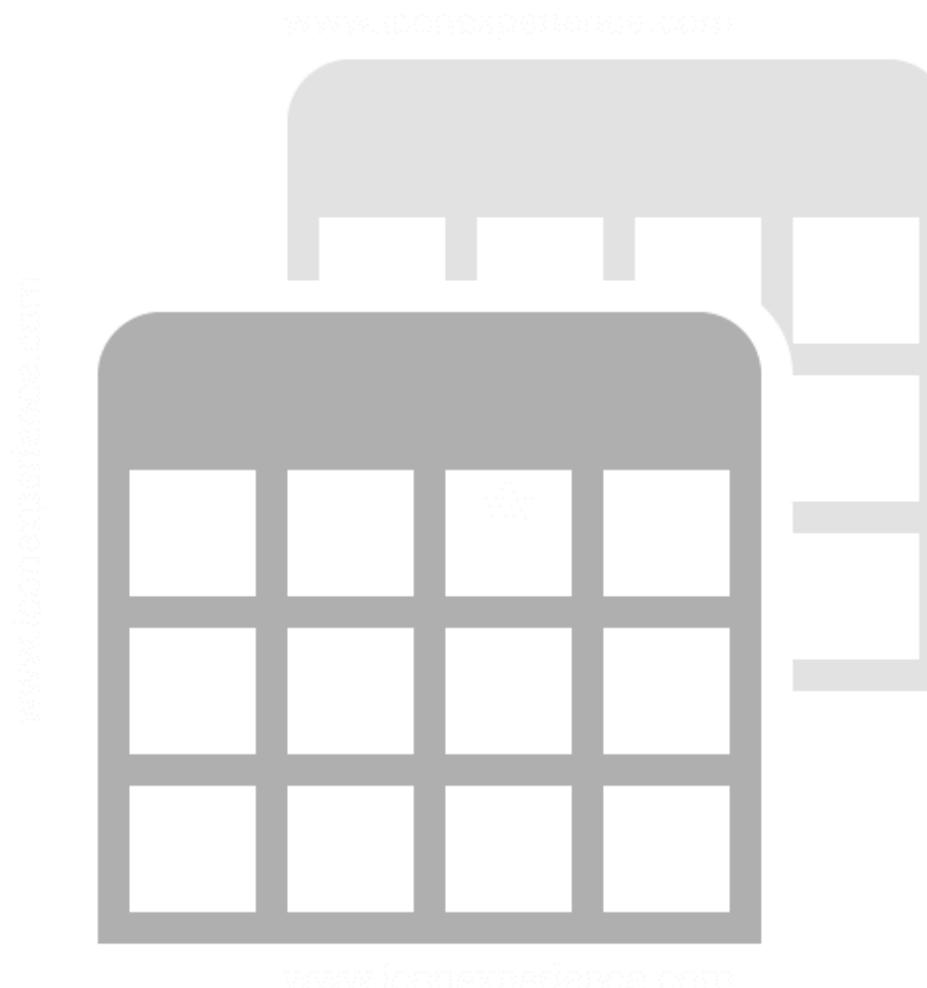


# UPM Primary Entities and Relationships

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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.

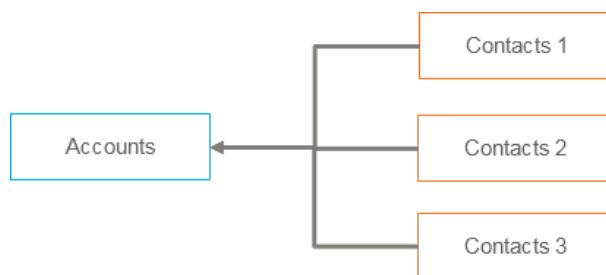
## Contacts

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	

# UPM Primary Objects ERD

