

# Glossary

Term	Definition
Deploying Company	The Deploying Company is a company who has deployed a Sugar product (and hence this Deploying Company is a SugarCRM Customer).
Customer	A company who <i>intends to purchase</i> or <i>has purchased</i> a product or service the Deploying Company has to offer.
Account	Synonymous with Customer.
Contact	A person who is associated with a Customer.
Prospect	A person who has not yet purchased any product or service from the Deploying Company.
Sales Cycle	Sales Cycle starts when a Customer or a Contact or a Prospect expresses interest in purchasing a product or service from the Deploying Company. The Sales Cycle ends when either the Contact (or Prospect) has purchased a product or service from the Deploying Company or when the deal (a.k.a Opportunity) is lost.
Lead	<p>A lead represents the start of a Sales Cycle. A lead represents a person (either a Prospect or an existing Contact) and optionally, it holds a reference to associated Customer. A lead can also optionally refer to purchase interest (Product / Service) indicated by the prospect/contact. (Note that at present lead does not have any reference to purchase interest (Product / Service).)</p> <p>Given the fact that Sugar product suite includes a data store for Prospect as well as a separate data store for Contacts, a Lead object can be just a shell which either points to a Prospect or a Contact (and optionally Customer). For Leads associated with Prospects, if there is company information then it will be stored as attributes in the Prospect record itself.</p> <p><b>NOTE: If we make Lead object as just a shell in Sugar 7, there are upgrade implications. I will check with Jenny/Majed to see if we can take this up for Sugar 7. Depending on the feedback, the stories can be developed.</b></p>
Opportunity	<p>An opportunity is the next step in the sales cycle right after lead.</p> <p>Some times sales representatives find sales opportunity through their own prospecting efforts, and in these cases they directly create opportunities, and leads are not created. In such scenarios sales cycle starts with an opportunity.</p> <p>For B2B businesses, since the sales cycles are typically long, sales representatives need to forecast sales based on opportunities.</p> <p>For B2C businesses, unless it is a 'considered purchase' which takes some time to close the deal, an opportunity and then a quote may be created during the sales cycle before closing the deal. But for most B2C business models, a lead can directly convert to a quote or an order.</p>

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Quote	<p>A quote is the next step in the sales cycle right after opportunity.</p> <p>For a B2B business or B2C-Considered Purchase business model It is rare for quote to get created directly without either a lead or an opportunity.</p> <p>For B2C businesses however a quote can be created without a lead or an opportunity.</p>
Order	<p>An order is the next step in the sales cycle right after quote.</p> <p>For a B2B business or B2C-Considered Purchase business model, due to long sales cycles, It is very rare for an order to get created directly without a lead or an opportunity or a quote.</p> <p>For B2C businesses however an order can be created without a lead or an opportunity or a quote.</p>