# Accounts

ID

Name

Type

* Competitor
* Prospect Customer
* Customer
* Former Customer
* Prospect Vendor
* Vendor
* QPL

Summary

Detail

Website

Email

Location

LinkedIn

Parent Co

CAGE

Created Date

Image

Video

## Relationships:

* QPLs
* Vendor
* Contacts
* Tasks
* Notes

# Contacts

Name

Quality (ranking 5 to 1)

Status:

lets( /\* Styling \*/ overdueStyling, ["b", "u", "red\_background"], ontimeStyling, ["b", "u", "green\_background"], dueStyling, ["b", "u", "yellow\_background"], /\* Dates \*/ today, formatDate(now(),"MMMM D, Y"), daysUntil, dateBetween(Next 💬, now(), "Days"), overdueDays, dateBetween(now() ,Next 💬, "Days"), /\* Result \*/ if(empty(💬 Frequency (Days)), "💬 Frequency Not Set", if(Next 💬 > now(), ("💬 Due In " + (daysUntil + 1) + " Days").style(ontimeStyling), if(today == formatDate(Next 💬, "MMMM D, Y"), "💬 Due Today".style(dueStyling), ("💬 Overdue by " + overdueDays + " Days").style(overdueStyling) ))))

Frequency date

Last

Next

dateAdd(Last 💬,💬 Frequency (Days), "days")

Email

Title

Phone

Fax

LinkedIn

Business

Business Owner

Buyer Code

## Relationships:

* Accounts
* Notes
* Tasks
* Opportunities
* Interactions & Appointments

# RFQs

ID

Quantity

Quote

Lead Time

Effective Date

Document

## Relationships:

* Products
* Vendors
* QPLs

# QPLs

ID

## Relationships:

* Products
* QPLs
  + Cage

# Products

ID

Created Time

FSC

Description

## Relationships:

* Products (comprable products)
* RFQs
* Vendors
* Opportunities
  + MFR
  + Payment History

# Notes

ID

Note

Created Date

Last Modified

## Relationships:

* Accounts
* Contacts
* Opportunities
* Projects

# Interactions & Appointments

ID

Direction

* Received
* Sent

Type

* Email
* Text
* Call
* LinkedIn
* In Person
* Mail

Status

* Completed
* Follow up

Message

Attachments

## Relationships:

Contacts

* Email

Opportunities

# Tasks

ID

Status

* Not Started
* In Progress
* Completed

Work Date

Due Date

Days Till Due

Owner

Start Date

Completed Date

Parent Item

Sub Item

Priority

* Low
* Medium
* High

Scheduled

if(empty(Due Date), "Needs Scheduling", "Scheduled")

Countdown

let(daysBetween, dateBetween(Due Date, today(), "days"), ifs( Status == "Completed", "Completed".style("green","green\_background"), daysBetween < 0, (daysBetween\*-1 + " days overdue").style("red\_background"), daysBetween == 0, "Due Today".style("blue", "blue\_background"), daysBetween > 0, (daysBetween + " days to go").style("green","green\_background"), "Set Due Date!" ) ).style("c", "b")

Time Taken

Past Due

## Relationships:

* Products
* Tasks
* Contact
* Accounts
* Opportunities

# Opportunities

ID

Stage

* Prospecting
* RFQ Requested
* RFQ Received
* Submit Bid
* Project Started

State

* Active
* No Bid
* Past Due
* Bid Lost
* Won

Bid Price

Purchase Costs

Packaging & Shipping

Profit

(Bid Price - Purchase Costs - Packaging & Shipping Costs) \* Quantity​

Bid Date

Close Date

Quantity

Unit

MFR

FOB

* Origin
* Destination

Packaging Type

* MIL-STD-2073-1E
* ASTM
* (Dynamically More)

ISO

* Yes
* No

Sampling

* Yes
* No

Days AOD

Packaging Info

Payment

Last Modified

Created Date

Buyer

Skipped

Document

## Relationships:

* Products
* Tasks
* Contacts
* Notes
* Projects
* Interactions & Appointments

# Projects

ID

Status

* Not Started
* In Progress
* Done

Priority

* High
* Medium
* Low

Dates

Summary

## Relationships:

* Products
* Tasks
* Contacts
* Opportunities
* Vendor
* Projects