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# References

## Table of Symbols

|  |  |
| --- | --- |
| **Symbol** | **Description** |
| **\*** | Required field. |
| **†** | Business required field. |
| **🔒** | Read-only field. |
| **✘ Audit** | Audit is disabled for this field. |
| **🔑** | Field security is enabled for this field. |
| **** | Create permission. |
| **💾** | Update permission. |
| **** | Read permission. |

## Table of Security Role Privileges

|  |  |
| --- | --- |
| **Color** | **Privilege** |
|  | Basic (User) |
|  | Local (Business Unit) |
|  | Deep (Parent: Child) |
|  | Global (Organisation) |

## Table of Security Profiles

|  |  |
| --- | --- |
| **Security Profile** | **Fields** |
| **Sales Security Profile** | ** Read**  **Opportunity**  [■ Approve Closure](#a837e4a1a79c679_9f1c_e811_80d6_00155d0) |

# Account

## Account

### Form Fields

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Name** | | | | **Type** | **Description** | **Audit** |
| **Summary** |  |  |  | | | |
| **ACCOUNT INFORMATION** |  |  |  | | | |
| Account Name\* | | | | String MAX(160)  [name](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7ba1965545-44bc-4b7b-b1ae-93074d0e3f2a%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Type the company or business name. |  |
| Phone | | | | String MAX(50)  [telephone1](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b4f8dae72-5905-4130-987a-6fc85e450466%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Type the main phone number for this account. |  |
| Fax | | | | String MAX(50)  [fax](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b9811cb32-482f-4dd3-9b5d-5340236dcd61%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Type the fax number for the account. |  |
| Website | | | | String MAX(200)  [websiteurl](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b536a48f0-657b-4029-95cd-9472059fc44a%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Type the account's website URL to get quick details about the company profile. |  |
| Parent Account | | | | Lookup On [account](#account)  [parentaccountid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b218eaefa-b657-4eee-933e-aa39fa8ae5c6%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Choose the parent account associated with this account to show parent and child businesses in reporting and analytics. |  |
| Ticker Symbol | | | | String MAX(10)  [tickersymbol](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bb0448516-5677-4b9f-945d-36017bbffd97%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Type the stock exchange symbol for the account to track financial performance of the company. You can click the code entered in this field to access the latest trading information from MSN Money. |  |
| **ADDRESS** |  |  |  | | | |
| Address 1 | | | | Memo  [address1\_composite](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b7ffa2f83-c47c-49da-81de-e41829c856ba%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Shows the complete primary address. |  |
|  |  |  |  | | | |
| Map View | | | | Sub-grid  mapcontrol |  | **Audit✘** |
| **SOCIAL PANE** |  |  |  | | | |
|  | | | | Notes Control  notescontrol |  | **Audit✘** |
| **Section** |  |  |  | | | |
| Primary Contact | | | | Lookup On [contact](#contact)  [primarycontactid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bdcf69df9-5aa5-4ff0-8f7d-edbe5b7aea7c%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Choose the primary contact for the account to provide quick access to contact details. |  |
| Primary Contact | | | | Quick Form  contactquickform |  | **Audit✘** |
| CONTACTS | | | | Sub-grid  Contacts |  | **Audit✘** |
| RECENT OPPORTUNITIES | | | | Sub-grid  accountopportunitiesgrid |  | **Audit✘** |
| RECENT CASES | | | | Sub-grid  accountcasessgrid |  | **Audit✘** |
| ACTIVE ENTITLEMENTS | | | | Sub-grid  subgrid\_Entitlement |  | **Audit✘** |
| **Details** |  |  |  | | | |
| **COMPANY PROFILE** |  |  |  | | | |
| Industry | | | | Picklist  [industrycode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bae00233e-70c0-4a1f-803f-03ff723e5440%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d)  Values  **Accounting** | **Description:**  Select the account's primary industry for use in marketing segmentation and demographic analysis. |  |
| SIC Code | | | | String MAX(20)  [sic](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b1534a09c-3313-4189-8fec-a132d69f9a0d%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Type the Standard Industrial Classification (SIC) code that indicates the account's primary industry of business, for use in marketing segmentation and demographic analysis. |  |
| Ownership | | | | Picklist  [ownershipcode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b7be79e9c-1a22-45b2-b09f-1e37cba95bfa%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d)  Values  **Public** | **Description:**  Select the account's ownership structure, such as public or private. |  |
| **Description** |  |  |  | | | |
| Description | | | | Memo  [description](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bc6000ee7-3aa3-4bfc-afc2-0cff33de5a03%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Type additional information to describe the account, such as an excerpt from the company's website. |  |
| **MARKETING** |  |  |  | | | |
| Originating Lead | | | | Lookup On [lead](#lead)  [originatingleadid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b7bf7ed76-77bb-4b70-8086-312df7727588%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Shows the lead that the account was created from if the account was created by converting a lead in Microsoft Dynamics 365. This is used to relate the account to data on the originating lead for use in reporting and analytics. |  |
| Last Campaign Date🔒 | | | | DateTime  [lastusedincampaign](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bbc247de2-6d37-4ea1-9db8-3de2beef935c%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Shows the date when the account was last included in a marketing campaign or quick campaign. |  |
| Marketing Materials | | | | Boolean  [donotsendmm](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7be282748e-3c74-4cdd-8f21-93fe92faee94%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Select whether the account accepts marketing materials, such as brochures or catalogs. |  |
| **CONTACT PREFERENCES** |  |  |  | | | |
| Contact Method | | | | Picklist  [preferredcontactmethodcode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bcc5719c0-4fcd-44d3-b1ff-ad77073344e2%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d)  Values  **Any** | **Description:**  Select the preferred method of contact. |  |
| Email | | | | Boolean  [donotemail](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7be4c0ddc5-d87e-438d-8c97-927ddae50adf%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Select whether the account allows direct email sent from Microsoft Dynamics 365. |  |
| Follow Email | | | | Boolean  [followemail](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b401eed95-62b1-4dd4-8ca2-c5a2bee16481%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Information about whether to allow following email activity like opens, attachment views and link clicks for emails sent to the account. |  |
| Bulk Email | | | | Boolean  [donotbulkemail](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bd80bc199-9dd4-493a-9932-d1fab5590e1a%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Select whether the account allows bulk email sent through campaigns. If Do Not Allow is selected, the account can be added to marketing lists, but is excluded from email. |  |
| Phone | | | | Boolean  [donotphone](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7ba4561f83-3630-4f3c-9a36-1cdfff96a97a%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Select whether the account allows phone calls. If Do Not Allow is selected, the account will be excluded from phone call activities distributed in marketing campaigns. |  |
| Fax | | | | Boolean  [donotfax](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b616c80e2-b5c6-4927-990a-0cb1b05b5eae%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Select whether the account allows faxes. If Do Not Allow is selected, the account will be excluded from fax activities distributed in marketing campaigns. |  |
| Mail | | | | Boolean  [donotpostalmail](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b5a476574-a083-4dc5-ba40-b909fe4890f8%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Select whether the account allows direct mail. If Do Not Allow is selected, the account will be excluded from letter activities distributed in marketing campaigns. |  |
| **BILLING** |  |  |  | | | |
| Currency | | | | Lookup On [transactioncurrency](#transactioncurrency)  [transactioncurrencyid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b6d36e3a6-3e08-4fbc-aaa7-247eba2ab9f5%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Choose the local currency for the record to make sure budgets are reported in the correct currency. |  |
| Credit Limit | | | | Money  [creditlimit](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7ba961ec67-dbad-4932-9b4a-62931d394485%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Type the credit limit of the account. This is a useful reference when you address invoice and accounting issues with the customer. |  |
| Credit Hold | | | | Boolean  [creditonhold](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bcc7229b4-bb8b-49a3-a7f8-77e7d89201d7%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d) | **Description:**  Select whether the credit for the account is on hold. This is a useful reference while addressing the invoice and accounting issues with the customer. |  |
| Payment Terms | | | | Picklist  [paymenttermscode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b94afe94b-4ca6-4d62-9585-ab4670012dfb%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d)  Values  **Net 30** | **Description:**  Select the payment terms to indicate when the customer needs to pay the total amount. |  |
| **SHIPPING** |  |  |  | | | |
| Shipping Method | | | | Picklist  [address1\_shippingmethodcode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b064a6cf1-ec3d-4e57-bfb7-011e168cf35f%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d)  Values  **Airborne** | **Description:**  Select a shipping method for deliveries sent to this address. |  |
| Freight Terms | | | | Picklist  [address1\_freighttermscode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7be7c8f2bf-c314-4d3d-bb8e-83726acf99e8%7d&entityId=%7b70816501-edb9-4740-a16c-6a5efbc05d84%7d)  Values  **FOB** | **Description:**  Select the freight terms for the primary address to make sure shipping orders are processed correctly. |  |
| **CHILD ACCOUNTS** |  |  |  | | | |
| Child Accounts | | | | Sub-grid  ChildAccounts |  | **Audit✘** |

## Sync Plugins

|  |  |  |
| --- | --- | --- |
| **Plugin** | **Stage** | **Message** |
| ProActive.Generic.ParseZipCode.ParseZipCode | Pre-validation | Create |
| Pre-validation | Update |

## Business Process Flows

### [test account bpf 1](http://win-u3r5fcn5pft/CRM365/tools/ProcessControl/bpfConfigurator.aspx?id=%7be4091ff1-dc67-4cb2-9c49-27b7897f7574%7d)

|  |  |  |
| --- | --- | --- |
| **NEW STAGE** | **NEW STAGE** | **NEW STAGE** |
|  | ■ Account Number |  |

### [test account bpf 2](http://win-u3r5fcn5pft/CRM365/tools/ProcessControl/bpfConfigurator.aspx?id=%7b5f5fda2b-c4c7-419a-aa9b-3c074530e8cc%7d)

|  |
| --- |
| **NEW STAGE** |

## Async Procsses

|  |  |
| --- | --- |
| **Workflow** | **Description** |
| [test account wf](http://win-u3r5fcn5pft/CRM365/sfa/workflow/edit.aspx?id=%7bf7c8a182-268f-4ca3-b401-5f6dca84824a%7d) | (Calling User)  (Scope: User)  Message:  **#CHILD**  **#ONDEMAND**  Child Workflows:  [■ test account bpf 2](http://win-u3r5fcn5pft/CRM365/sfa/workflow/edit.aspx?id=%7bf7c8a182-268f-4ca3-b401-5f6dca84824a%7d) |

## Security Roles

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Role Name** | **Create** | **Read** | **Write** | **Delete** | **Append** | **Append To** | **Assign** | **Share** | **Reparent** |
| [CEO-Business Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b96ce0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [CSR Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7bc1dc0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Customer Service Representative](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b12c00b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Knowledge Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b41d60b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Marketing Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7be8d10b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Marketing Professional](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7bd6ca0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Sales Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b63c80b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Salesperson](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b4ed40b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Schedule Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7bcacc0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Scheduler](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b1adb0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Support User](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b2dd10b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [System Administrator](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b86c40b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [System Customizer](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b3dd80b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Vice President of Marketing](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b14c20b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Vice President of Sales](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b39df0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |

**Key Legend**

|  |  |  |  |
| --- | --- | --- | --- |
| **Basic (User)** | **Local (Business Unit)** | **Deep (Parent: Child)** | **Global (Organisation)** |
|  |  |  |  |

# Contact

## Contact

### Form Fields

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Type** | **Description** | **Audit** |
| **Summary** |  |  |  |
| **Section** |  |  |  |
| Security Roles | Sub-grid  sg\_securityRoles |  | **Audit✘** |
| **CONTACT INFORMATION** |  |  |  |
| Full Name | String MAX(160)  [fullname](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b179aa4a5-6317-42a0-9b71-836591b963f1%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Combines and shows the contact's first and last names so that the full name can be displayed in views and reports. |  |
| Job Title | String MAX(100)  [jobtitle](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b6ad24f34-8bfb-4301-bb61-d6d5466e1e03%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Type the job title of the contact to make sure the contact is addressed correctly in sales calls, email, and marketing campaigns. |  |
| Account Name | Customer  [parentcustomerid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bc7a58b13-df19-491c-a918-1bc26eaf6eb3%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Select the parent account or parent contact for the contact to provide a quick link to additional details, such as financial information, activities, and opportunities. |  |
| Email | String MAX(100)  [emailaddress1](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b024a2ee3-b983-4fd8-8991-f8d548a227e0%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Type the primary email address for the contact. |  |
| Business Phone | String MAX(50)  [telephone1](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7beac88f8f-9072-4a1a-ad67-cf439d900dc8%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Type the main phone number for this contact. |  |
| Mobile Phone | String MAX(50)  [mobilephone](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b3c53ad8a-04ac-4a14-a73f-24de4c721e28%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Type the mobile phone number for the contact. |  |
| Fax | String MAX(50)  [fax](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bd657c60a-0b6e-4d0e-a87f-b439579b5bae%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Type the fax number for the contact. |  |
| Preferred Method of Contact | Picklist  [preferredcontactmethodcode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b3423a9b1-891b-44cb-a9b9-28d5a4ffb628%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d)  Values  **Any** | **Description:**  Select the preferred method of contact. |  |
| Address | Memo  [address1\_composite](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b8c498e4c-3920-4038-839c-f5aca96a7941%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Shows the complete primary address. |  |
| Postal Code | Integer  [pa\_postalcode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b2a27bbbb-1eaf-e711-80bc-00155d008101%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) |  |  |
| Team Template | Lookup On [teamtemplate](#teamtemplate)  [new\_teamtemplate](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b7f196282-be2b-4eca-b72c-61cd545308bd%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) |  |  |
|  |  |  |  |
| Map View | Sub-grid  mapcontrol |  | **Audit✘** |
| **SOCIAL PANE** |  |  |  |
|  | Notes Control  notescontrol |  | **Audit✘** |
| **CUSTOMER DETAILS** |  |  |  |
| Company | Customer  [parentcustomerid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bc7a58b13-df19-491c-a918-1bc26eaf6eb3%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Select the parent account or parent contact for the contact to provide a quick link to additional details, such as financial information, activities, and opportunities. |  |
| Company Name | Quick Form  contactquickform |  | **Audit✘** |
| RECENT CASES | Sub-grid  contactcasessgrid |  | **Audit✘** |
| RECENT OPPORTUNITIES | Sub-grid  contactopportunitiesgrid |  | **Audit✘** |
| ENTITLEMENTS | Sub-grid  subgrid\_Entitlement |  | **Audit✘** |
| **Details** |  |  |  |
| **PERSONAL** |  |  |  |
| Gender | Picklist  [gendercode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7ba81e86c9-e2e1-4c1e-81ab-8913eedaab47%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d)  Values  **Male** | **Description:**  Select the contact's gender to make sure the contact is addressed correctly in sales calls, email, and marketing campaigns. |  |
| Marital Status | Picklist  [familystatuscode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b18d22cd0-f923-4d46-97e2-9decc997d285%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d)  Values  **Single** | **Description:**  Select the marital status of the contact for reference in follow-up phone calls and other communications. |  |
| Spouse/Partner Name | String MAX(100)  [spousesname](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b82f97199-b0a4-4382-8ed6-f5dc5a57676b%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Type the name of the contact's spouse or partner for reference during calls, events, or other communications with the contact. |  |
| Birthday | DateTime  [birthdate](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b9fb79f93-3449-4dec-a6b6-96faf3fdc0c7%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Enter the contact's birthday for use in customer gift programs or other communications. |  |
| Anniversary | DateTime  [anniversary](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b8377804d-868f-49fb-9515-b7cc30afeb83%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Enter the date of the contact's wedding or service anniversary for use in customer gift programs or other communications. |  |
| **PERSONAL NOTES** |  |  |  |
| Description | Memo  [description](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b85617eb1-9944-47ed-8d56-8536832fd3ca%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Type additional information to describe the contact, such as an excerpt from the company's website. |  |
| **MARKETING** |  |  |  |
| Originating Lead | Lookup On [lead](#lead)  [originatingleadid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b1a8ab7df-d528-48f2-920a-b6cc7cb306e5%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Shows the lead that the contact was created if the contact was created by converting a lead in Microsoft Dynamics 365. This is used to relate the contact to the data on the originating lead for use in reporting and analytics. |  |
| Last Campaign Date🔒 | DateTime  [lastusedincampaign](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b034cb7b4-5d3e-41d2-87ce-427db760d01b%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Shows the date when the contact was last included in a marketing campaign or quick campaign. |  |
| Marketing Materials | Boolean  [donotsendmm](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7be294567c-19b5-4188-8402-2750238fbea2%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Select whether the contact accepts marketing materials, such as brochures or catalogs. Contacts that opt out can be excluded from marketing initiatives. |  |
| **CONTACT PREFERENCES** |  |  |  |
| Contact Method | Picklist  [preferredcontactmethodcode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b3423a9b1-891b-44cb-a9b9-28d5a4ffb628%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d)  Values  **Any** | **Description:**  Select the preferred method of contact. |  |
| Email | Boolean  [donotemail](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b54cfd897-4c94-4af9-9c33-b014ccbc482a%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Select whether the contact allows direct email sent from Microsoft Dynamics 365. If Do Not Allow is selected, Microsoft Dynamics 365 will not send the email. |  |
| Follow Email | Boolean  [followemail](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bb6a3a39c-ca04-4dd2-95d5-da59fb282e06%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Information about whether to allow following email activity like opens, attachment views and link clicks for emails sent to the contact. |  |
| Bulk Email | Boolean  [donotbulkemail](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b61914e7e-4904-4664-834d-d211d14b467b%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Select whether the contact accepts bulk email sent through marketing campaigns or quick campaigns. If Do Not Allow is selected, the contact can be added to marketing lists, but will be excluded from the email. |  |
| Phone | Boolean  [donotphone](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b20ba2e1b-5b95-45c4-b9c4-7c15de6ba45f%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Select whether the contact accepts phone calls. If Do Not Allow is selected, the contact will be excluded from any phone call activities distributed in marketing campaigns. |  |
| Fax | Boolean  [donotfax](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b650630b8-fa1a-41ba-a9f8-1218467a0d6b%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Select whether the contact allows faxes. If Do Not Allow is selected, the contact will be excluded from any fax activities distributed in marketing campaigns. |  |
| Mail | Boolean  [donotpostalmail](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7ba12ad652-a906-4fb2-b40a-4ff7e294c2c0%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Select whether the contact allows direct mail. If Do Not Allow is selected, the contact will be excluded from letter activities distributed in marketing campaigns. |  |
| **BILLING** |  |  |  |
| Currency | Lookup On [transactioncurrency](#transactioncurrency)  [transactioncurrencyid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b0762c350-de10-41f9-8f84-a64f5ce9d306%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Choose the local currency for the record to make sure budgets are reported in the correct currency. |  |
| Credit Limit | Money  [creditlimit](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b1f2a3873-bdb2-4c54-9a3f-dd44f50f2de3%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Type the credit limit of the contact for reference when you address invoice and accounting issues with the customer. |  |
| Credit Hold | Boolean  [creditonhold](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7ba6e910a3-7504-49f7-8a03-6c80e733886e%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d) | **Description:**  Select whether the contact is on a credit hold, for reference when addressing invoice and accounting issues. |  |
| Payment Terms | Picklist  [paymenttermscode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b384614ff-b79c-4009-9bec-7dedf8c7b99c%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d)  Values  **Net 30** | **Description:**  Select the payment terms to indicate when the customer needs to pay the total amount. |  |
| **SHIPPING** |  |  |  |
| Shipping Method | Picklist  [address1\_shippingmethodcode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b05e0cbb6-bb5b-4d8f-ace9-7cfc1f2a04ee%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d)  Values  **Airborne** | **Description:**  Select a shipping method for deliveries sent to this address. |  |
| Freight Terms | Picklist  [address1\_freighttermscode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b24858aea-93fd-4dfd-a51d-d289b0135a39%7d&entityId=%7b608861bc-50a4-4c5f-a02c-21fe1943e2cf%7d)  Values  **FOB** | **Description:**  Select the freight terms for the primary address to make sure shipping orders are processed correctly. |  |

## Sync Plugins

|  |  |  |
| --- | --- | --- |
| **Plugin** | **Stage** | **Message** |
| ProActive.Generic.ParseZipCode.ParseZipCode | Pre-validation | Create |
| Pre-validation | Update |

## Security Roles

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Role Name** | **Create** | **Read** | **Write** | **Delete** | **Append** | **Append To** | **Assign** | **Share** | **Reparent** |
| [CEO-Business Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b96ce0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [CSR Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7bc1dc0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Customer Service Representative](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b12c00b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Knowledge Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b41d60b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Marketing Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7be8d10b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Marketing Professional](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7bd6ca0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Sales Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b63c80b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Salesperson](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b4ed40b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Schedule Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7bcacc0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Scheduler](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b1adb0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Support User](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b2dd10b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [System Administrator](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b86c40b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [System Customizer](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b3dd80b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Vice President of Marketing](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b14c20b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Vice President of Sales](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b39df0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |

**Key Legend**

|  |  |  |  |
| --- | --- | --- | --- |
| **Basic (User)** | **Local (Business Unit)** | **Deep (Parent: Child)** | **Global (Organisation)** |
|  |  |  |  |

# Demo parent

## Information

### Form Fields

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Type** | **Description** | **Audit** |
| **General** |  |  |  |
| **General** |  |  |  |
| Name\* | String MAX(100)  [la\_name\_text](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b91d90520-56fe-426b-9bc1-36a541238496%7d&entityId=%7b9140e337-087d-4531-818c-f36358fb1f5f%7d) | **Description:**  The name of the custom entity. |  |
| Description | Memo  [la\_description\_text](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b506ed122-dff1-4988-8cae-15085fbd75f8%7d&entityId=%7b9140e337-087d-4531-818c-f36358fb1f5f%7d) |  |  |
| Owner\* | Owner  [ownerid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bed944c38-fa6c-49d5-8ff0-17d4e5b0e611%7d&entityId=%7b9140e337-087d-4531-818c-f36358fb1f5f%7d) | **Description:**  Owner Id |  |
| **Notes** |  |  |  |
| Angular | Sub-grid  WebResource\_angular |  | **Audit✘** |
| Note Text | Notes Control  notescontrol |  | **Audit✘** |

## Security Roles

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Role Name** | **Create** | **Read** | **Write** | **Delete** | **Append** | **Append To** | **Assign** | **Share** | **Reparent** |
| [Support User](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b2dd10b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [System Administrator](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b86c40b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [System Customizer](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b3dd80b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |

**Key Legend**

|  |  |  |  |
| --- | --- | --- | --- |
| **Basic (User)** | **Local (Business Unit)** | **Deep (Parent: Child)** | **Global (Organisation)** |
|  |  |  |  |

# Lead

## Lead

### Form Fields

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Type** | **Description** | **Audit** |
| **Summary** |  |  |  |
| **CONTACT** |  |  |  |
| Topic\* | String MAX(300)  [subject](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bcf069f95-d552-4d95-af88-f53116b76beb%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Type a subject or descriptive name, such as the expected order, company name, or marketing source list, to identify the lead. |  |
| Name | String MAX(160)  [fullname](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b2b978f49-1d57-4957-8e7c-0c597f8134a4%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Combines and shows the lead's first and last names so the full name can be displayed in views and reports. |  |
| Job Title | String MAX(100)  [jobtitle](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b38f3faa0-f874-416f-88f4-9eee72b41370%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Type the job title of the primary contact for this lead to make sure the prospect is addressed correctly in sales calls, email, and marketing campaigns. |  |
| Business Phone | String MAX(50)  [telephone1](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b4d5977d7-349c-438f-be79-c42765d8fec0%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Type the work phone number for the primary contact for the lead. |  |
| Mobile Phone | String MAX(20)  [mobilephone](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b21fba68b-bb86-4d35-8d1d-0cdf980c3249%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Type the mobile phone number for the primary contact for the lead. |  |
| Email | String MAX(100)  [emailaddress1](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bd316346e-1825-40e8-bdcd-d44ca627fae0%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Type the primary email address for the lead. |  |
| **COMPANY** |  |  |  |
| Company† | String MAX(100)  [companyname](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b0c5fe280-6585-42c7-b027-8e08e7204666%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Type the name of the company associated with the lead. This becomes the account name when the lead is qualified and converted to a customer account. |  |
| Website | String MAX(200)  [websiteurl](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bb133276c-17bc-441c-8569-93008393c840%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Type the website URL for the company associated with this lead. |  |
| Address | Memo  [address1\_composite](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b900df954-3fc2-4ae5-8c1f-0d8044c021f3%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Shows the complete primary address. |  |
|  |  |  |  |
| Map View | Sub-grid  mapcontrol |  | **Audit✘** |
| **SOCIAL PANE** |  |  |  |
|  | Notes Control  notescontrol |  | **Audit✘** |
|  |  |  |  |
| STAKEHOLDERS | Sub-grid  Stakeholders |  | **Audit✘** |
| COMPETITORS | Sub-grid  Competitors |  | **Audit✘** |
| **Details** |  |  |  |
| **Lead Information** |  |  |  |
| Description | Memo  [description](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bf47195f3-f743-4bc5-ad5c-ee4c88d31207%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Type additional information to describe the lead, such as an excerpt from the company's website. |  |
| Industry | Picklist  [industrycode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b49afb6d2-986f-4ccc-b07d-a38de518b8d1%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d)  Values  **Accounting** | **Description:**  Select the primary industry in which the lead's business is focused, for use in marketing segmentation and demographic analysis. |  |
| Annual Revenue | Money  [revenue](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bd5fd30d9-f6cf-4875-9a5e-351705a39f71%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Type the annual revenue of the company associated with the lead to provide an understanding of the prospect's business. |  |
| No. of Employees | Integer  [numberofemployees](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b00d50b2e-6649-41e5-85e2-221338db863a%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Type the number of employees that work at the company associated with the lead, for use in marketing segmentation and demographic analysis. |  |
| SIC Code | String MAX(20)  [sic](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bffbb7c42-41c4-4c7a-9565-e7186f30358a%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Type the Standard Industrial Classification (SIC) code that indicates the lead's primary industry of business for use in marketing segmentation and demographic analysis. |  |
| Currency | Lookup On [transactioncurrency](#transactioncurrency)  [transactioncurrencyid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bafa5bada-5ac8-4103-b744-105286f770a0%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Choose the local currency for the record to make sure budgets are reported in the correct currency. |  |
| **MARKETING INFORMATION** |  |  |  |
| Source Campaign | Lookup On [campaign](#campaign)  [campaignid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b9c072964-46a4-4a5f-ace2-c29844c0e4be%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Choose the campaign that the lead was generated from to track the effectiveness of marketing campaigns and identify communications received by the lead. |  |
| Marketing Materials | Boolean  [donotsendmm](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bc49eb811-5070-415f-b4f6-27b26f899319%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Select whether the lead accepts marketing materials, such as brochures or catalogs. Leads that opt out can be excluded from marketing initiatives. |  |
| Last Campaign Date🔒 | DateTime  [lastusedincampaign](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b96ad4c5e-1f27-48fe-b55d-50bb8c489590%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Shows the date when the lead was last included in a marketing campaign or quick campaign. |  |
| **CONTACT METHOD** |  |  |  |
| Preferred | Picklist  [preferredcontactmethodcode](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bffc69d64-adcf-4bfa-ad9f-f0806478d5a3%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d)  Values  **Any** | **Description:**  Select the preferred method of contact. |  |
| Email | Boolean  [donotemail](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b511fdeaf-c666-4052-8d82-b57bfade46f4%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Select whether the lead allows direct email sent from Microsoft Dynamics 365. |  |
| Follow Email | Boolean  [followemail](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7be2857835-9237-4323-9be5-f7ad2e798a03%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Information about whether to allow following email activity like opens, attachment views and link clicks for emails sent to the lead. |  |
| Bulk Email | Boolean  [donotbulkemail](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bbde22893-991c-4f72-a978-885a6d753b60%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Select whether the lead accepts bulk email sent through marketing campaigns or quick campaigns. If Do Not Allow is selected, the lead can be added to marketing lists, but will be excluded from the email. |  |
| Phone | Boolean  [donotphone](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bb3381f07-f53e-4dd9-a662-cae08e425ffc%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Select whether the lead allows phone calls. |  |
| Mail | Boolean  [donotpostalmail](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bc8e98f36-152b-4da0-8dd1-7bd2166e6b3c%7d&entityId=%7bdc6574cb-92ce-446c-a5d6-885a75107d52%7d) | **Description:**  Select whether the lead allows direct mail. |  |

## Business Process Flows

### [Lead to Opportunity Sales Process](http://win-u3r5fcn5pft/CRM365/tools/ProcessControl/bpfConfigurator.aspx?id=%7b919e14d1-6489-4852-abd0-a63a6ecaac5d%7d)

|  |  |  |  |
| --- | --- | --- | --- |
| **QUALIFY** | **DEVELOP** | **PROPOSE** | **CLOSE** |
| [■ Existing Contact?](#a837e4a1c506ddf_ac44_4ac6_86fc_e55a72a) | [■ Customer Need](#a837e4ac7f10b16_7290_446f_aec5_fc70444) | ■ Identify Sales Team | ■ Complete Final Proposal |
| [■ Existing Account?](#8448b78218eaefa_b657_4eee_933e_aa39fa8) | [■ Proposed Solution](#a837e4aa2f66ad3_313e_4247_b4fd_695c8e8) | ■ Develop Proposal | ■ Present Final Proposal |
| [■ Purchase Timeframe](#a837e4a766c1175_7e93_4d31_b876_fd1db95) | ■ Identify Stakeholders | ■ Complete Internal Review | ■ Confirm Decision Date |
| [■ Estimated Budget](#a837e4a99f7e376_752a_457f_b8bf_d5ac1a4) | ■ Identify Competitors | ■ Present Proposal | ■ Send Thank You |
| [■ Purchase Process](#a837e4afa2eabf5_3736_47c8_99c0_715b8e3) |  |  | ■ File De-brief |
| ■ Identify Decision Maker |  |  |  |
| [■ Capture Summary](#8448b78c6000ee7_3aa3_4bfc_afc2_0cff33d) |  |  |  |

### [test lead bpf](http://win-u3r5fcn5pft/CRM365/tools/ProcessControl/bpfConfigurator.aspx?id=%7bad01f9a6-d0fa-4f23-a6d2-ad2a87d56b00%7d)

|  |  |
| --- | --- |
| **NEW STAGE1** | **NEW STAGE** |
| [■ Existing Contact?](#a837e4a1c506ddf_ac44_4ac6_86fc_e55a72a) | ■ Address 1: Name |

## Sync Procsses

|  |  |
| --- | --- |
| **Workflow** | **Description** |
| [lead test](http://win-u3r5fcn5pft/CRM365/sfa/workflow/edit.aspx?id=%7ba9ac2fc9-e79f-43ff-86f6-ef1c122a80eb%7d) | (Calling User)  Message:  **#CREATE**  **#UPDATE**  **#ONDEMAND**  Child Workflows:  [■ test lead bpf](http://win-u3r5fcn5pft/CRM365/sfa/workflow/edit.aspx?id=%7ba9ac2fc9-e79f-43ff-86f6-ef1c122a80eb%7d)  Triggers:  ■ firstname  ■ address1\_name |

## Security Roles

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Role Name** | **Create** | **Read** | **Write** | **Delete** | **Append** | **Append To** | **Assign** | **Share** | **Reparent** |
| [CEO-Business Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b96ce0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [CSR Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7bc1dc0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Customer Service Representative](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b12c00b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Knowledge Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b41d60b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Marketing Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7be8d10b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Marketing Professional](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7bd6ca0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Sales Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b63c80b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Salesperson](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b4ed40b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Schedule Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7bcacc0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Scheduler](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b1adb0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Support User](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b2dd10b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [System Administrator](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b86c40b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [System Customizer](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b3dd80b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Vice President of Marketing](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b14c20b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Vice President of Sales](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b39df0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |

**Key Legend**

|  |  |  |  |
| --- | --- | --- | --- |
| **Basic (User)** | **Local (Business Unit)** | **Deep (Parent: Child)** | **Global (Organisation)** |
|  |  |  |  |

# Opportunity

## Opportunity

### Form Fields

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Type** | **Description** | **Audit** |
| **Summary** |  |  |  |
| **Opportunity Information** |  |  |  |
| Topic\* | String MAX(300)  [name](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bcca28961-bbde-4536-b916-f1f192105bfa%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Type a subject or descriptive name, such as the expected order or company name, for the opportunity. |  |
| Contact | Lookup On [contact](#contact)  [parentcontactid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b1c506ddf-ac44-4ac6-86fc-e55a72ad9840%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Choose a contact to connect this opportunity to, so that the relationship is visible in reports and analytics. |  |
| Account | Lookup On [account](#account)  [parentaccountid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b257b4f83-ad85-4151-b062-4b6788397c47%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Choose an account to connect this opportunity to, so that the relationship is visible in reports and analytics, and to provide a quick link to additional details, such as financial information and activities. |  |
| Purchase Timeframe | Global Picklist  [purchasetimeframe](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b766c1175-7e93-4d31-b876-fd1db95df485%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d)  Values  **Immediate** | **Description:**  Choose how long the lead will likely take to make the purchase. |  |
| Currency\* | Lookup On [transactioncurrency](#transactioncurrency)  [transactioncurrencyid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b0af414d4-017d-4833-b152-3487c1d724a9%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Choose the local currency for the record to make sure budgets are reported in the correct currency. |  |
| Budget Amount | Money  [budgetamount](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b99f7e376-752a-457f-b8bf-d5ac1a4d3c8b%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Type a value between 0 and 1,000,000,000,000 to indicate the lead's potential available budget.  **Dependent Processes:**  [■ Update Opportunity Sales Process Credit Calculation](#b58c08d0_fc1f_4f57_a977_c0825384372e)  **JavaScript:**  [■ OnBudgetChange](#30b0cd7a837e4aOnBudgetChange) |  |
| Purchase Process | Global Picklist  [purchaseprocess](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bfa2eabf5-3736-47c8-99c0-715b8e3698e6%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d)  Values  **Individual** | **Description:**  Choose whether an individual or a committee will be involved in the purchase process for the lead. |  |
| Description | Memo  [description](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bbc871c2d-1dec-42a2-959c-b2c12b20d1f1%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Type additional information to describe the opportunity, such as possible products to sell or past purchases from the customer. |  |
| 🔑Approve Closure | Boolean  [new\_approveclosuer](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b1a79c679-9f1c-e811-80d6-00155d008101%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Permissions:**  🔑 Sales Security Profile **** |  |
| **Opportunity Details** |  |  |  |
| Current Situation | Memo  [currentsituation](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b6f73a0f3-3261-42ad-95b6-017dfa6643c4%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Type notes about the company or organization associated with the opportunity. |  |
| Customer Need | Memo  [customerneed](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bc7f10b16-7290-446f-aec5-fc704444a5ed%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Type some notes about the customer's requirements, to help the sales team identify products and services that could meet their requirements. |  |
| Proposed Solution | Memo  [proposedsolution](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7ba2f66ad3-313e-4247-b4fd-695c8e8bc1e1%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Type notes about the proposed solution for the opportunity. |  |
| **NOTES PANE** |  |  |  |
|  | Notes Control  notescontrol |  | **Audit✘** |
| **SOCIAL PANE** |  |  |  |
| STAKEHOLDERS | Sub-grid  Stakeholders |  | **Audit✘** |
| SALES TEAM | Sub-grid  Pursuit\_Team |  | **Audit✘** |
| COMPETITORS | Sub-grid  Competitors |  | **Audit✘** |
| **Product Line Items** |  |  |  |
| **Opportunity Products** |  |  |  |
| Price List | Lookup On [pricelevel](#pricelevel)  [pricelevelid](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b2bd3b54d-62ab-474e-9b47-475410ddb6dd%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Choose the price list associated with this record to make sure the products associated with the campaign are offered at the correct prices. |  |
| Revenue | Boolean  [isrevenuesystemcalculated](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bc5484b16-0bad-4589-b459-a4382f53ae99%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Select whether the estimated revenue for the opportunity is calculated automatically based on the products entered or entered manually by a user. |  |
| Opportunity Products | Sub-grid  opportunityproductsGrid |  | **Audit✘** |
|  |  |  |  |
|  | Sub-grid  ProductSuggestions\_LinkControl |  | **Audit✘** |
|  |  |  |  |
|  | Sub-grid  DynamicPropertiesList\_LinkControl |  | **Audit✘** |
| **Product Line Item Totals** |  |  |  |
| Detail Amount🔒 | Money  [totallineitemamount](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b49f11687-d820-47a6-a694-69786aa182bb%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Shows the sum of all existing and write-in products included on the opportunity, based on the specified price list and quantities. |  |
| (-) Discount (%) | Decimal  [discountpercentage](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b3b0e56ba-bd68-4a11-b066-c341daba060d%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Type the discount rate that should be applied to the Product Totals field to include additional savings for the customer in the opportunity. |  |
| (-) Discount | Money  [discountamount](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b30eebf4c-de11-4602-9c97-6eda90dc4411%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Type the discount amount for the opportunity if the customer is eligible for special savings. |  |
| Pre-Freight Amount🔒 | Money  [totalamountlessfreight](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b69603038-8e63-4cc4-86d4-9b418b28d65e%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Shows the total product amount for the opportunity, minus any discounts. This value is added to freight and tax amounts in the calculation for the total amount of the opportunity. |  |
| (+) Freight Amount | Money  [freightamount](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b85b56b7d-9e00-483a-ba20-94d6140ec40a%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Type the cost of freight or shipping for the products included in the opportunity for use in calculating the Total Amount field. |  |
| (+) Total Tax🔒 | Money  [totaltax](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7b0d1a4e93-1c64-4af2-8826-d8f3f5cfb60e%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Shows the total of the Tax amounts specified on all products included in the opportunity, included in the Total Amount field calculation for the opportunity. |  |
| Total Amount🔒 | Money  [totalamount](http://win-u3r5fcn5pft/CRM365/tools/systemcustomization/attributes/manageAttribute.aspx?attributeId=%7bcf62005b-0734-49b8-9c6a-670bda68acf5%7d&entityId=%7b30b0cd7e-0081-42e1-9a48-688442277fae%7d) | **Description:**  Shows the total amount due, calculated as the sum of the products, discounts, freight, and taxes for the opportunity. |  |
| **Quotes** |  |  |  |
| **Quotes** |  |  |  |
| Quotes | Sub-grid  quote |  | **Audit✘** |

### Form Scripts

|  |  |  |
| --- | --- | --- |
| **Library** | **Function** | **Attribute** |
| [new\_OpportunityForm.js](http://win-u3r5fcn5pft/CRM365/WebResources/new_OpportunityForm.js) | OnSave | **[ONSAVE]** |
| OnLoad | **[ONLOAD]** |
| OnBudgetChange | [■ Budget Amount](#a837e4a99f7e376_752a_457f_b8bf_d5ac1a4) |

## Business Process Flows

### [test opportunity bpf](http://win-u3r5fcn5pft/CRM365/tools/ProcessControl/bpfConfigurator.aspx?id=%7b8ec17998-fcc9-4e1e-889d-549bf975318a%7d)

|  |
| --- |
| **NEW STAGE** |
| [■ Account](#8448b78218eaefa_b657_4eee_933e_aa39fa8) |

### [Opportunity Sales Process](http://win-u3r5fcn5pft/CRM365/tools/ProcessControl/bpfConfigurator.aspx?id=%7b3e8ebee6-a2bc-4451-9c5f-b146b085413a%7d)

|  |  |  |  |
| --- | --- | --- | --- |
| **QUALIFY** | **DEVELOP** | **PROPOSE** | **CLOSE** |
| [■ Identify Contact](#a837e4a1c506ddf_ac44_4ac6_86fc_e55a72a) | [■ Customer Need](#a837e4ac7f10b16_7290_446f_aec5_fc70444) | ■ Identify Sales Team | ■ Complete Final Proposal |
| [■ Identify Account](#8448b78218eaefa_b657_4eee_933e_aa39fa8) | [■ Proposed Solution](#a837e4aa2f66ad3_313e_4247_b4fd_695c8e8) | ■ Develop Proposal | ■ Present Final Proposal |
| [■ Purchase Timeframe](#a837e4a766c1175_7e93_4d31_b876_fd1db95) | ■ Identify Stakeholders | ■ Complete Internal Review | ■ Confirm Decision Date |
| [■ Estimated Budget](#a837e4a99f7e376_752a_457f_b8bf_d5ac1a4) | ■ Identify Competitors | ■ Present Proposal | ■ Send Thank You |
| [■ Purchase Process](#a837e4afa2eabf5_3736_47c8_99c0_715b8e3) |  |  | ■ File De-brief |
| ■ Identify Decision Maker |  |  |  |
| [■ Capture Summary](#8448b78c6000ee7_3aa3_4bfc_afc2_0cff33d) |  |  |  |

## Sync Procsses

|  |  |
| --- | --- |
| **Workflow** | **Description** |
| [test opportunity](http://win-u3r5fcn5pft/CRM365/sfa/workflow/edit.aspx?id=%7beb35e618-a6d9-4531-b7f6-1cf091390735%7d) | (Calling User)  Message:  **#UPDATE**  **#ONDEMAND**  Child Workflows:  [■ test opportunity bpf](http://win-u3r5fcn5pft/CRM365/sfa/workflow/edit.aspx?id=%7beb35e618-a6d9-4531-b7f6-1cf091390735%7d) |

## Async Procsses

|  |  |
| --- | --- |
| **Workflow** | **Description** |
| [Update Opportunity Sales Process Credit Calculation](http://win-u3r5fcn5pft/CRM365/sfa/workflow/edit.aspx?id=%7bb58c08d0-fc1f-4f57-a977-c0825384372e%7d) | (Calling User)  (Scope: User)  Message:  **#CREATE**  **#UPDATE**  **#CHILD**  **#ONDEMAND**  Triggers:  ■ estimatedvalue  ■ estimatedclosedate  [■ Budget Amount](#a837e4a99f7e376_752a_457f_b8bf_d5ac1a4)  ■ actualvalue |

## Security Roles

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Role Name** | **Create** | **Read** | **Write** | **Delete** | **Append** | **Append To** | **Assign** | **Share** | **Reparent** |
| [CEO-Business Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b96ce0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [CSR Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7bc1dc0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Customer Service Representative](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b12c00b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Knowledge Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b41d60b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Marketing Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7be8d10b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Marketing Professional](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7bd6ca0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Sales Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b63c80b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Salesperson](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b4ed40b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Schedule Manager](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7bcacc0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Scheduler](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b1adb0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Support User](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b2dd10b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [System Administrator](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b86c40b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [System Customizer](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b3dd80b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Vice President of Marketing](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b14c20b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |
| [Vice President of Sales](http://win-u3r5fcn5pft/CRM365/biz/roles/edit.aspx?id=%7b39df0b69-9d62-e711-80b8-00155d010200%7d) |  |  |  |  |  |  |  |  |  |

**Key Legend**

|  |  |  |  |
| --- | --- | --- | --- |
| **Basic (User)** | **Local (Business Unit)** | **Deep (Parent: Child)** | **Global (Organisation)** |
|  |  |  |  |