

CRM DB Analysis

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Account Module - Account

To create and manage customer accounts for your organization.

An account contains your customer information such as name and address.

Each account can be associated with other records such as opportunities and contacts.

|  |  |
| --- | --- |
| Account Table. |   |
| Account |   |
| ID | The account id |
| Date Entered | Date of date insertion |
| Date Modified | Date of date modification |
| Created By | User created this account |
| Deleted | Flag indicates weather the account is deleted or not |
| Description | Text description |
| Name | Account name |
| Account Type | The account category such as Customer, press or Partner. |
| Industry | The industrial sector to which the account belongs. |
| Annual Revenue | The annual revenue for the organization. |
| Phone | The phone number of the organization. |
| Billing Address | The primary street address for the account.  |
| Rating | The organization’s rating in the industry. |
| Website | URL for the organization’s Web site. |
| Ownership | Specify the owner information. |
| Employees Count | The number of employees in the organization. |
| Owner Email | Email address for the account owner |

Activity Module - Calls

You can schedule calls and meetings with users, contacts, and leads. When you schedule a call or a meeting, you are creating a record about the subject of discussion, the participants, the time period, and the status. After you save this information, you can send out an invitation to all the participants immediately or at a later date. You can create a note or add attachments before or after a call or a meeting occurs. After you complete a call.

|  |  |
| --- | --- |
| Calls Table |   |
| Id | Identification number. |
| Subject | The subject of discussion. |
| Date Entered | date of data insertion |
| Date Modified | date of data modification |
| Created By | user that create the record |
| Description | a brief description of the call |
| Deleted | flag to determine whether the record is deleted or not |
| Assigned User Id | user that responsible for the call |
| Duration | call duration |
| Start Date | start date of the call |
| Start Time | start time of the call |
| Related To | this call related to accounts, leads, ….. |
| Status | Planned, held, not held, …. |
| Direction | inbound or outbound |
| Parent Id | the id of the related item  |
| Reminder Time | time before call is held to remind about  |

Activity Module – Meetings

You can schedule calls and meetings with users, contacts, and leads. When you schedule a call or a meeting, you are creating a record about the subject of discussion, the participants, the time period, and the status. After you save this information, you can send out an invitation to all the participants immediately or at a later date. You can create a note or add attachments before or after a call or a meeting occurs. After you complete a call.

|  |  |
| --- | --- |
| Meetings Table |   |
| Id | identification number |
| Subject | subject that will be discussed in the meeting |
| Date Entered | date of data insertion |
| Date Modified | date of data modification |
| Created By | user that create the record |
| Description | a brief description of the meeting |
| Deleted | flag to determine whether the record is deleted or not |
| Assigned User Id | user that responsible for the meeting |
| Location | where the meeting will be held |
| Duration | meeting duration |
| Start Date  | start date of the meeting |
| Start Time | start time of the meeting |
| Related To | this meeting related to accounts, leads, ….. |
| Status | Planned, held, not held, …. |
| Parent Id | the id of the related  |
| Reminder Time | time before meeting is held to remind about  |

Activity Module - Notes

You can create or import notes related to a specific call, meeting, or task for distribution to participants.

Notes enable you to add comments on a subject and maintain a record of discussions pertaining to a call, meeting, or task.

You can also attach supporting documents to a note.

|  |  |
| --- | --- |
| Notes Table |   |
| Id | identification number |
| Name | note name |
| Date Entered | date of data insertion |
| Date Modified | date of data modification |
| Created By | user that create the record |
| Description | a brief description about the note |
| Deleted | flag to determine whether the record is deleted or not |
| Related To | this note related to accounts, leads, ….. |
| Parent Id | the id of the related item ex: an account |
| Filename | Name of the attached file |
| File Mime Type | Mime Type |
| Contact id | id of the contact concerned with this note |

Activity Module - Tasks

Based on your work-related activities, you can create tasks and assign them to yourself or to other users.

When you create a task, you can relate it to a specific record such as an account or an opportunity.

You can also revise the task status and priority at any time to keep your records up-to-date.

|  |  |
| --- | --- |
| Tasks Table |   |
| Id | identification number |
| Name | task name |
| Date Entered | date of data insertion |
| Date Modified | date of data modification |
| Created By | user that create the record |
| Description | a brief description of the task |
| Deleted | flag to determine whether the record is deleted or not |
| Assigned User Id | user that responsible for the task |
| Start Date | start date of the task |
| End Date | date of completion |
| Related To | this task related to accounts, leads, ….. |
| Status | Planned, held, not held… |
| Parent Id | the id of the related item |
| Reminder Time | time before task is held to remind about  |
| Priority | low, high, very high priority |

Contacts Module – Contacts

A contact is any individual who is a valid sales lead; that is, a lead who has been evaluated and assessed for a possible sales opportunity. You can associate a contact with any record such as an account, opportunity, or campaign. Associating a contact with a campaign enables you to track the effectiveness of the campaign in generating opportunities for your organization.

|  |  |
| --- | --- |
| Contacts Table |   |
| Id | The contact's Id |
| Date Entered | Date of date insertion |
| Date Modified | Date of date modification |
| Created By | User created this contact account |
| Deleted | Flag indicates weather the contact is deleted or not |
| Description | A brief description |
| First Name | The contact’s first name. |
| Last Name | The contact’s last name. |
| Department | The department to which the contact belongs. |
| Title | The contact’s business title. |
| Report To | The contact’s supervisor (from the Contacts list). |
| Office Phone | The contact’s work number. |
| Mobile | The contact’s mobile phone number. |
| Address | The contact's street address |
| Assistant | The assistant’s name. |
| Assistant Phone | The assistant’s phone number. |
| Account Name | The account name associated with the contact |
| Lead Source | The source that generated the lead, such as direct mail or trade show. |
| Do Not Call | To add the contact to the Do Not Call list. This is to ensure that the contact is not targeted during campaigns. |
| Birth date | The contact’s birth date. |
| Assigned To | The individual who is responsible for communicating with this contact. By default, you. |

Documents Module – Documents

Use the Documents module to create and manage files that you share with users and contacts. Use the Documents module to create a library of documents and graphics that you can share with other users and contacts. You can create a variety of documents ranging from marketing collateral to contracts.

|  |  |
| --- | --- |
| Documents Table |   |
| Id | Document id |
| Date Entered | Date of data insertion |
| Date Modified | Date of data modification |
| Created By | User Created the document |
| Description | A brief description of the document |
| Deleted | Flag determine whether the record is deleted or not |
| Doc Name | A name for the document. |
| Document Type | Type of document EULA, Mail merge |
| Active Date | The date when the document is published for other users to view and download it. |
| Exp Date | The date when the validity of the document expires. |
| Category Id (F.K) |   |
| Sub Category Id (F.K) |   |
| Status Id (F.K) |   |
| Doc Revision Id | If you revised this document, enter the revision number |
| Related Doc Id | Id of a related document. |
| Related Doc Rev Id | The id for the revised related document |

Documents Module – Documents

|  |  |
| --- | --- |
| Categories Table |   |
| Id | Category Id |
| Name | Category Name |

|  |  |
| --- | --- |
| Sub Categories Table |   |
| Id | subcategory ID |
| Name | Subcategory Name |

|  |  |
| --- | --- |
| Status Table |   |
| Id | Status Id |
| Name | Status Name |

Leads Module – Leads

Leads are early contacts in the sales process. After they have been evaluated and assessed, you can convert them into contacts, opportunities, and accounts. You can associate a lead with any type of campaign to track the effectiveness of the campaign in generating opportunities for your organization.

|  |  |
| --- | --- |
| Leads Table |   |
| ID | Lead Id |
| Date Entered | Date of date insertion |
| Date Modified | Date of date modification |
| Created By | User created this lead account |
| Deleted | Flag indicates weather the lead is deleted or not |
| Description | A brief description |
| First Name | The lead's first name |
| Last Name | The lead's Last Name |
| Department | The department to which the contact belongs. |
| Title | The business title of the lead. |
| Report To | The lead's supervisor |
| Office Phone | Enter the lead's office phone number. |
| Mobile | Enter the lead's mobile phone number. |
| Address | The lead's address |
| Assistant | The assistant’s name. |
| Assistant Phone | The assistant’s phone number. |
| Account Name | The name of the related account. |
| Lead Source | The origins of the lead such as Trade Show or Direct Mail. |
| Do Not Call | To add the contact to the Do Not Call list. This is to ensure that the contact is not targeted during campaigns. |
| Converted | Indicate whether the lead has been converted to contact or not. |
| Status | The status of the lead such as New or In Process.  |

Opportunity Module – Opportunity

Use the Opportunities module to create and manage sales opportunities for your organization.

Every opportunity must be associated with an account.

You can associate an opportunity with only one account but you can associate it with multiple leads and contacts.

|  |  |
| --- | --- |
| Opportunity Table |   |
| Id | Opportunities id |
| Name | Opportunities name |
| Date entered | Date when opportunities is entered |
| Date modified | Date when opportunities is modified |
| Modified user id  | User who modified the opportunities |
| Created by | User who create the opportunities |
| Description | A brief description about the opportunities |
| Deleted | Deleted or not |
| Assigned user id | user to whom opportunities is assigned |
| Opportunity type | Specify whether the opportunity is from an existing customer or a potential customer. |
| Campaign id (F.k) | To associate an opportunity with a campaign, |
| Lead source | Specify type of the lead |
| Amount | Enter the estimated amount of the closing a sale. |
| Currency id | Currency type |
| Date closed | Opportunities Closed date |
| Next step | Enter the next step in closing a sale |

Project Module – Project

Use the Projects Module to create and manage projects for your organization.

Every project is assigned to a user. The assigned user is the project manager.

By default, this is the user who created the project. The assigned user can assign the project to another user.

|  |  |
| --- | --- |
| Project Table |   |
| Id | Project id |
| Date entered | Date when project entered |
| Date modified | date when project Modified |
| Assigned user id | the user who has ownership of the project |
| Created by | The id of the user who creates the project |
| Name | Name for the project. |
| Description | brief description of the project. |
| Deleted | to indicate project deleted or not |
| Estimated start date | select the project start date |
| Estimated end date | select the project end date. |
| Status | project status such as Draft, In Review, or Published. |
| Priority | the importance of the project |

Project Module – Project tasks

You can define multiple project tasks for each project. When you create a project task, you must associate it with a project. You can associate a project with multiple activities, accounts, opportunities, and cases.

|  |  |
| --- | --- |
| Project task Table |   |
| Id | task identification number |
| Date entered | Date when the task is entered |
| Date modified | Date when task is modified |
| Project id | Project associated with the task |
| Name | Name for the task. |
| Status | Indicates current state of the task, in progress, completed, … |
| Description | A brief description of the task. |
| Date start | The date when the task is due to begin. |
| Date finished | Date when the task is due to be |
| duration | Whole task period |
| Duration unit | time unit that the task duration divided to |
| Actual duration | Actual time period for the task |
| Percent complet | Indicate what percentage of the task has been completed |
| Parent task id | id for the previous project task |
| Predecessor Id | id for the follower project task |
| Assigned user id | id of the user associated with this task |
| Priority | Importance of completing this task |
| Created by | the user created this record |
| Task number | A task number uniquely identifies the task. You can refer to a task by its number instead of its name |
| Estimated effort | the expected sum of actual efforts for all project tasks.  |
| Actual effort | the sum of actual efforts for all project tasks.  |
| Deleted | Flag indicates whether the record is deleted or not |
| Utilization | the number of work hours that a user should dedicate their work hours towards the assigned task. |

Email Module – Emails

The Emails module is an email client that enables you to manage your emails.

You can take the following actions in the Emails module:

* Access emails. You can view and process emails on external mail servers without downloading them into the Sugar database.
* Compose and send emails.
* Search for emails based on parameters, such as keyword and subject.
* Create a related record, such as a bug or a lead from an email.
* Create an address book consisting of users, contacts, leads, and targets with whom you frequently communicate.

|  |  |
| --- | --- |
| Email Table |   |
| id | identification number |
| Date entered | date of data insertion |
| Date modified | date of data modification |
| Assigned user id | user that responsible for the email |
| Created by | user that create the record |
| Deleted | flag to determine wether the record is deleted or not |
| Date sent | the date when the message sent |
| Message id | id of the related message |
| Type | direction, in or out |
| Status | sent, not yet, read, new, received |
| Related To | this call related to accounts, leads, ….. |
| Parent Id | the id of the related item sub item |

Email Module – Email Addresses

You can populate the Email address book with email addresses of individuals with whom you frequently correspond.

You can select individuals from your list of contacts, leads, targets, and users.

The advantage of using an address book is that the system automatically displays a drop-down list of names and email addresses when you enter the first letter in the To, CC, or BCC fields. You can select from the list instead of typing in the whole email address.

|  |  |
| --- | --- |
| Email Addresses Table |   |
| Id | identification number |
| Email add | small letters email address |
| Email add caps | caps lock email address |
| Invalid email | flag dermine wether the email is stilll valid or not |
| Date created | date of data insertion |
| Date modified | date of data modification |
| Deleted  | flag to determine wether the record is deleted or not |

Email Module – Email Addresses

From the Emails module, you can send out emails to users, contacts, leads, and other external individuals and organizations. When you compose an email, you can choose the mail account from which to send the email.

|  |  |
| --- | --- |
| Message Table |   |
| Message id | id of the message |
| From add | from email  |
| To add | to email |
| Cc add | Carbon copy |
| Bcc add | Blind carbon copy |
| Massage text | text |
| deleted | flag to determine wether the record is deleted or not |

Campaign Module – Campaign

Use the Campaigns Module to track and manage mass marketing campaigns.

|  |  |
| --- | --- |
| Campaign Table |   |
| Id | Campaign id |
| Name | Campaign name |
| Date entered | Date when campaign entered |
| Date modified | Date when campaign modified |
| Created by | User who creates the campaign |
| Deleted | Is deleted or not |
| Assigned user id | User to whom this campaign is assigned |
| Tracker key | The user who tracks the campaign |
| Tracker count | Number of trackers |
| Start date | Date when campaign starts |
| End date | Date when campaign ends |
| Status | The status of the campaign |
| Impression |  |
| Currency id | select the currency used for the campaign. |
| Budget | a numerical value for the campaign budget |
| Expected cost | expected cost of the campaign |
| Actual cost | actual cost of the campaign. |
| Expected revenue | The revenue you expect from this campaign |
| Campaign type | Method used by the campaign |
| Objectives | Describes objectives expected from the campaign |
| Frequency | This field displays only for newsletter campaigns intervals at which the newsletter will be emailed to targets. |

Campaign Module – Prospects

A target is an individual that you have some information on but does not qualify as a lead or contact. Targets are stand-alone records that are not attached to contacts, leads, or opportunities.

|  |  |
| --- | --- |
| Prospects Table |   |
| Id | identification number |
| Date entered | Date of date insertion |
| Date modified | Date of date modification |
| Created by | User created this contact account |
| Description | A brief description |
| Deleted | Flag indicates weather the contact is deleted or not |
| Assigned user id | user to whom campaign is assigned |
| First name | the prospect's first name |
| Last name | the prospect's last name |
| Title | the prospect's business title |
| Department | prospect's job department |
| Do not call | To add the prospects to the Do Not Call list. This is to ensure that the contact is not targeted during campaigns. |
| Phone number | telephone number |
| Mobile number | mobile number |
| Address | home address |
| Assistance | The assistant’s name. |
| Assistance phone | The assistant’s phone number. |
| Birth date | The contact’s birth date. |
| Lead id | id of the related lead |
| Account name | name of related account |
| Campaign id | id of related campaign |

Campaign Module – Prospects list

You can group multiple targets into a target list according to a set of predetermined criteria such as age group or spending habits.

|  |  |
| --- | --- |
| Pros. list Table |   |
| Id | identification number |
| Name | list name |
| List type | by email, domain… |
| Date entered | Date of date insertion |
| Date modified | Date of date modification |
| Assigned user id | user to whom campaign is assigned |
| Created by | User created this contact account |
| Deleted | Flag indicates weather the contact is deleted or not |
| Description | A brief description |

Bug Tracker Module – Bugs

Use the Bug Tracker module to report, track, and manage product bugs.

Bugs are defects or features associated with a particular revision of a product.

|  |  |
| --- | --- |
| Bugs Table |   |
| Id | Bug id |
| Name | Bug name |
| Date entered | when the Bug is entered |
| Date modified | when the Bug is modified |
| Modified user id | user who modified the bug |
| Created by | the user who create the bug |
| Description | A brief description about the bug |
| Deleted | To indicate if deleted or not |
| Assigned user id | Individual to take ownership of the bug |
| Case number | A unique number of the bug |
| Type | is it defect or feature bug |
| Status | Specify the current status of the bug |
| Priority | Specify the urgency of the problem |
| Resolution | Results of the investigation into the problem |
| Work log | Use this field to record your actions to resolve the bug. |
| Source | The source of the bug |
| Product category | In which category the bug is founded |

Cases Module – Cases

Use the Cases module to track and manage problems with your services that are reported by your users and customers.

After you create a case, you can associate it with related bugs.

|  |  |
| --- | --- |
| Cases Table |   |
| Id | Case id |
| Name | Case name |
| Date entered | when the case is entered |
| Date modified | when the case is modified |
| Modified user id | user who modified the case |
| Created by | the user who create the case |
| Description | A brief description about the case |
| Deleted | To indicate if deleted or not |
| Assigned user id | Individual to take ownership of the case. |
| Case number | A unique number of the case |
| Type | is it Administration, user or product case |
| Status | Specify the current status of the problem |
| Priority | Specify the urgency of the problem |
| Resolution | Results of the investigation into the problem |
| Work log | Use this field to record your actions to resolve the bug. |
| Account id | Associated account |
| Id | Case id |

My Portals Module – Portals

Use the My Portals module to add links to Web sites and Web-based applications such as forums or the Web interface to your organization’s email system. Adding portal sites in Sugar enables the system to provide a single interface for multiple applications and Web sites.

|  |  |
| --- | --- |
| Portals Table |   |
| Id | Portal id |
| Portal URL | Website URL |
| Placement | Where to place your potal |
| Related user id | To whom this portal due to |
| Locality | is it personal or global |