SalesOutlook®

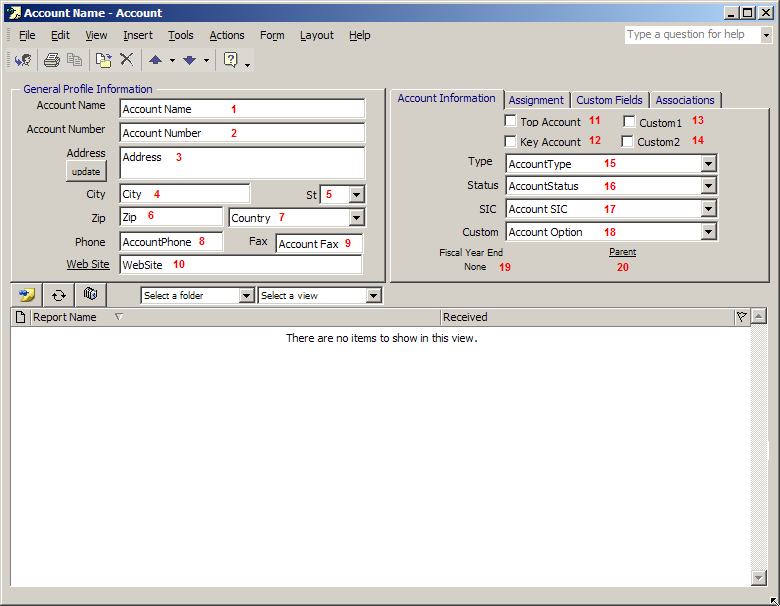
Forms Guide

**SalesOutlook, Inc.**

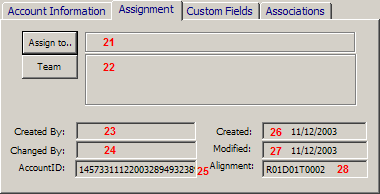
**(770) 642-4923**

# Fields on the forms

## Account Profile Form



|  | | Fieldname | Form Name |
| --- | --- | --- | --- |
| 1 | Account Name | | Account Name |
| 2 | AccountNumbertxt | | Account Number |
| 3 | AccountAddress1 | | Address |
| 4 | AccountCity | | City |
| 5 | AccountState | | State |
| 6 | Accountzip | | Zip Code |
| 7 | AccountCountry | | Country |
| 8 | AccountPhone | | Phone |
| 9 | Account Fax | | Fax |
| 10 | Account Web | | Web Site |
| 11 | Top25 | | Top Account |
| 12 | Key Account | | Key Account |
| 13 | AccountCheckbox1 | | Custom1 |
| 14 | AccountCheckbox2 | | Custom2 |
| 15 | AccountType | | Type |
| 16 | Account Status | | Status |
| 17 | Account SIC | | SIC |
| 18 | Account Option | | Custom |
| 19 | Fiscal Year End | | Fiscal Year End |
| 20 | Account Parent | | Parent |

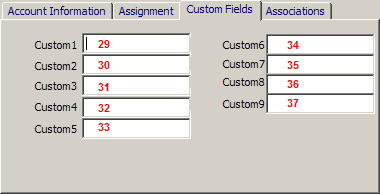


|  | | Fieldname | Form Name |
| --- | --- | --- | --- |
| 21 | Account Manager | Assign to |
| 22 | Team | Team |
| 23 | From | Created By |
| 24 | Changed By | Changed By |
| 25 | AccountID | AccountID\* Primary Key |
| 26 | Received | Created |
| 27 | Modified | Modified |
| 28 | Alignment | Alignment |

## Custom Drop Down

|  |  |
| --- | --- |
| **Type** | **Status** |
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| **SIC** | **Custom** |
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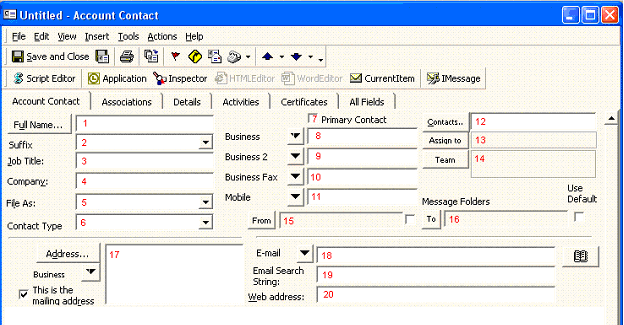
|  | Fieldname | Form Name |
| --- | --- | --- |
| 29 | Custom1 | Custom1 |
| 30 | Custom2 | Custom2 |
| 31 | Custom3 | Custom3 |
| 32 | Custom4 | Custom4 |
| 33 | Custom5 | Custom5 |
| 34 | Custom6 | Custom6 |
| 35 | Custom7 | Custom7 |
| 36 | Custom8 | Custom8 |
| 37 | Custom9 | Custom9 |

The following are on the Account Profile form but are not shown.

|  |  |  |
| --- | --- | --- |
|  | Fieldname | Form Name |
| 38 | FROM | Creator of the item |
| 39 | SUBJECT | Account Name |
| 40 | BODY | Associations Tab |
| 41 | Web Page | Web Page |
| 42 | MESSAGE CLASS | IPM.Post.SalesOutlook\_2000 |
| 43 | CREATED | Date item created per store |
| 44 | MODIFIED | Date item modified |
| 45 | Account LocationID | Parent Account ID |
| 46 | AccountNotes | AccountNotes |
| 47 | FormType | FormType |
| 48 | In Folder | Current Folder |
| 49 | Message | Body of Account |
| 50 | Selected Item | Current Radio Button |
| 51 | Selectedview | Current view |

* + Primary Key = Link to child objects

## Account Contact Form



|  | | Fieldname | Form Name |
| --- | --- | --- | --- |
| 1 | FULL NAME | Full Name |
| 2 | Suffix | Suffix |
| 3 | JOB TITLE | Job Title |
| 4 | COMPANY | Company |
| 5 | FILE AS | File As |
| 6 | Contact Type | Contact Type |
| 7 | Primary Contact | Primary Contact |
| 8 | BUSINESS\_TELEPHONE\_NUMBER | Business |
| 9 | BUSINESS2\_TELEPHONE\_NUMBER | Business 2 |
| 10 | BUSINESS\_FAX\_NUMBER | Business Fax |
| 11 | MOBILE\_TELEPHONE\_NUMBER | Mobile |
| 12 | Contacts | Contacts |
| 13 | Account Manager | Assign To |
| 14 | Team | Team |
| 15 | Message From Folder | From |
| 16 | Message To Folder | To |
| 17 | Address Selected | Address |
| 18 | EMAIL1 | Email |
| 19 | EmailSearchString | Email Search String |
| 20 | WEB PAGE | Web Address |

The following are on the Account Contacts form and may or may not be shown due to selection:

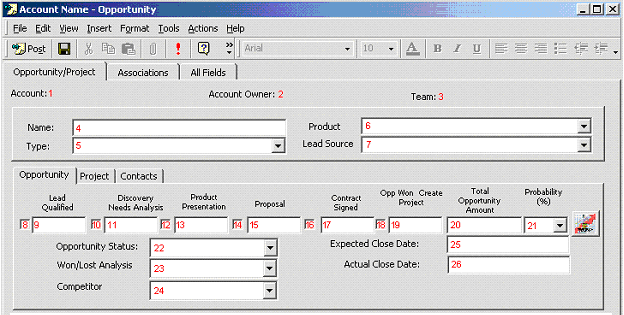
|  | Fieldname | Form Name |
| --- | --- | --- |
| 25 | DEPARTMENT\_NAME | Department |
| 26 | OFFICE\_LOCATION | Office |
| 27 | PROFESSION | Profession |
| 28 | ASSISTANT | Assistant’s Name |
| 29 | NICKNAME | Nickname |
| 30 | SPOUSE\_NAME | Spouse’s name |
| 31 | BIRTHDAY | Birthday |
| 32 | WEDDING\_ANNIVERSARY | Anniversary |
| 33 | BODY | Associations Tab |
| 34 | Categories | Categories |
| 35 | SURNAME | Last |
| 36 | MIDDLE\_NAME | Middle |
| 37 | GIVEN\_NAME | First |
| 38 | STREET\_ADDRESS | Street |
| 39 | POSTAL\_ADDRESS | Zip/Postal Code |
| 40 | LOCALITY | City |
| 41 | STATE\_OR\_PROVINCE | State/Province |
| 42 | POSTAL\_CODE | Zip |
| 43 | HOMEADDRESS | Based on address pull down with selection as Home |
| 44 | HOME\_ADDRESS\_STREET | Street (Home) |
| 45 | HOME\_ADDRESS\_POST\_OFFICE\_BOX | PO Box (Home) |
| 46 | HOME\_ADDRESS\_CITY | City (Home) |
| 47 | HOME\_ADDRESS\_STATE\_OR\_PROVINCE | State/Province (Home) |
| 48 | HOME\_ADDRESS\_POSTAL\_CODE | Zip/Postal Code (Home) |
| 49 | HOME\_ADDRESS\_COUNTRY | Country (Home) |
| 50 | OTHERADDRESS | Based on address pull down with selection as Other |
| 51 | OTHER\_ADDRESS\_STREET | Street (Other) |
| 52 | OTHER\_ADDRESS\_POST\_OFFICE\_BOX | PO Box (Other) |
| 53 | OTHER\_ADDRESS\_CITY | City (Other) |
| 54 | OTHER\_ADDRESS\_STATE\_OR\_PROVINCE | State/Province (Other) |
| 55 | OTHER\_ADDRESS\_POSTAL\_CODE | Zip/Postal Code (Other) |
| 56 | OTHER\_ADDRESS\_COUNTRY | Country (Other) |
| 57 | BUSINESSADDRESSSTREET | Street (Business) |
| 58 | BUSINESSADDRESSPOSTOFFICEBOX | PO Box (Business) |
| 59 | BUSINESSADDRESSCITY | City (Business) |
| 60 | BUSINESSADDRESSSTATE | State/Province (Business) |
| 61 | BUSINESSADDRESSPOSTALCODE | Zip/Postal Code (Business) |
| 62 | BUSINESS\_ADDRESS\_COUNTRY | Country (Business) |
| 63 | ASSISTANT\_TELEPHONE\_NUMBER | Assistant (Based on telephone dropdown selection) |
| 64 | COMPANY\_MAIN\_PHONE\_NUMBER | Company (Based on telephone dropdown selection) |
| 65 | HOME\_TELEPHONE\_NUMBER | Home (Based on telephone dropdown selection) |
| 66 | HOME2\_TELEPHONE\_NUMBER | Home 2 (Based on telephone dropdown selection) |
| 67 | HOME\_FAX\_NUMBER | Home Fax (Based on telephone dropdown selection) |
| 68 | OTHER\_TELEPHONE\_NUMBER | Other (Based on telephone dropdown selection) |
| 60 | PRIMARY\_FAX\_NUMBER | Primary Fax |
| 70 | PAGER\_TELEPHONE\_NUMBER | Pager |
| 71 | PRIMARY\_TELEPHONE\_NUMBER | Primary |
| 72 | FROM | Creator of the item |
| 73 | TITLE | Title |
| 74 | INITIALS |  |
| 75 | GENERATION | Suffix |
| 76 | SUBJECT | Account Name |
| 77 | BUSINESS\_HOME\_PAGE | Email |
| 78 | EMAIL2 | Email 2 (Based on email dropdown selection) |
| 79 | EMAIL3 | Email 3 (Based on email dropdown selection) |
| 80 | Account Name | Account Name |
| 81 | AccountType | Account Type |
| 82 | Account Status | Account Status |
| 83 | Account SIC | Account SIC |
| 84 | Account Option | Account Option |
| 85 | Top25 | Top25 |
| 86 | Key Account | Key Account |
| 87 | AccountCheckbox1 | Custom1 (Checkbox) |
| 88 | AccountCheckbox2 | Custom2 (Checkbox) |
| 89 | Custom1 | Custom1 |
| 90 | Custom2 | Custom2 |
| 91 | Custom3 | Custom3 |
| 92 | Custom4 | Custom4 |
| 93 | Custom5 | Custom5 |
| 94 | Custom6 | Custom6 |
| 95 | Custom7 | Custom7 |
| 96 | Custom8 | Custom8 |
| 97 | Custom9 | Custom9 |
| 98 | Alignment | Alignment |
| 99 | Selected Item | Select A Folder |
| 100 | Selected View | Selected A View |

Note: The fields located on the Account Info tab of the Account Contact form are named the same and have the same labels as the 4 checkboxes, 4 drop downs and 9 custom text fields on the Account Profile form and are available on the Account Contact form in SalesOutlook 4.3 and later.

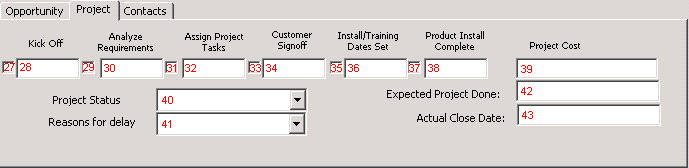
## Custom Drop Down

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| --- | --- |
| **Contact Type** | **Suffix** |
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## Opportunity Form



|  | FieldName | Form Name |
| --- | --- | --- |
| 1 | Account Name | Account |
| 2 | Account Owner | Account Manager |
| 3 | Team | Team |
| 4 | Name | Name |
| 5 | Opportunity Type | Type |
| 6 | Product | Product |
| 7 | Lead Source | Lead Source |
| 8 | Stage1 | Lead Qualified (Check box) |
| 9 | Stage1Date | Lead Qualified (text) |
| 10 | Stage2 | Discovery Needs Analysis (check box) |
| 11 | Stage2Date | Discovery Needs Analysis (text) |
| 12 | Stage3 | Product Presentation (check box) |
| 13 | Stage3Date | Product Presentation (text) |
| 14 | Stage4 | Proposal (check box) |
| 15 | Stage4Date | Proposal (text) |
| 16 | Stage5 | Contract Signed (check box) |
| 17 | Stage5Date | Contract Signed (text) |
| 18 | Stage6 | Opp Won Create Project (check box) |
| 19 | Stage6Date | Opp Won Create Project (text) |
| 20 | TotalPurchase | Total Opportunity Amount |
| 21 | Probability | Probability |
| 22 | Opportunity Status | Opportunity Status |
| 23 | Won/Lost | Won/Lost Analysis |
| 24 | Competitor | Competitor |
| 25 | Expected Close Date | Expected Close Date |
| 26 | Actual Close Date | Actual Close Date |

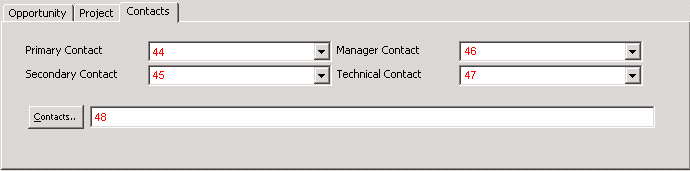


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| --- | --- | --- | --- |
|  | Fieldname | Form Name | |
| 27 | ProjectStage1 | | Kick Off (check box) |
| 28 | ProjectStage1Date | | Kick Off (text) |
| 29 | ProjectStage2 | | Analyze Requirements (check box) |
| 30 | ProjectStage2Date | | Analyze Requirements (text) |
| 31 | ProjectStage3 | | Assign Project Tasks (check box) |
| 32 | ProjectStage3Date | | Assign Project Tasks (text) |
| 33 | ProjectStage4 | | Customer Signoff (check box) |
| 34 | ProjectStage4Date | | Customer Signoff (text) |
| 35 | ProjectStage5 | | Install/Training Dates Set (check box) |
| 36 | ProjectStage5Date | | Install/Training Dates Set (text) |
| 37 | ProjectStage6 | | Product Install Complete (check box) |
| 38 | ProjectStage6Date | | Product Install Complete (text) |
| 39 | ProjectCost | | Project Cost |
| 40 | Project Status | | Project Status |
| 41 | Reason for Delay | | Reasons for delay |
| 42 | Expected Project Close Date | | Expected Project Done |
| 43 | Actual Project Close Date | | Actual Close Date |

## Custom Drop Down

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| --- | --- |
| **Type** | **Product** |
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| **Lead Source** | **Status** |
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| --- | --- | --- | --- |
|  | Fieldname | Form Name | |
| 44 | Contact1 | | Primary Contact |
| 45 | Contact2 | | Secondary Contact |
| 46 | Contact3 | | Manager Contact |
| 47 | Contact4 | | Technical Contact |
| 48 | Contacts | | Contacts |

The following are on the Opportunity form but are not shown:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Fieldname | Form Name | |
| 49 | Account Manager | | Account Manager |
| 50 | Alignment | | Alignment |
| 51 | Division Manager | | Division Manager |
| 52 | Account Name | | Account Name |
| 53 | Accountzip | | Accountzip |
| 54 | AccountID | | Account ID |
| 55 | ContactID | | Contact ID |
| 56 | OppID | | Opportunity ID\* Primary Key |
| 57 | Team | | Team |
| 58 | RegionNumberTxt | | Region |
| 59 | DivisionNumberTxt | | Division |
| 60 | TerritoryNumberTxt | | Territory |
| 61 | BODY | | Associations Tab |
| 62 | CREATED | | Date item created per store |
| 63 | FROM | | Creator of the item |
| 64 | MESSAGE CLASS | | IPM.Post.Opportunity |
| 65 | MODIFIED | | Date item modified |
| 66 | Product Group | | Product Group (related to Product) |
| 67 | Received | | Date item received |
| 68 | Selected Item | | Current Radio Button |

Note Form



|  |  |  |
| --- | --- | --- |
|  | Fieldname | Form Name |
| 1 | Type | Note Type |
| 2 | Subject | Note |
| 3 | Contact Name | Contact Name |
| 4 | Account Name | Account Name |
| 5 | Account Manager | Account Manager |
| 6 | Team | Team |
| 7 | BODY | (Body of Note) |
| 8 | Categories | Categories |

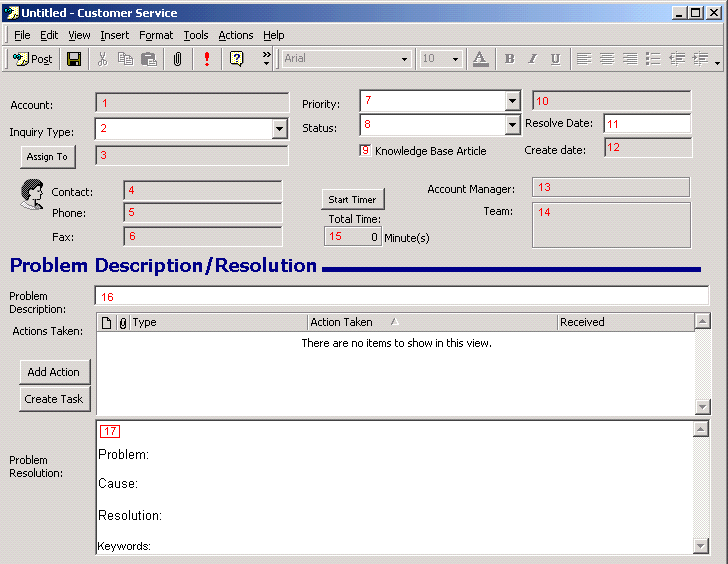
The following are on the Note form but are not shown:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Fieldname | Form Name | |
| 8 | Alignment | | Alignment |
| 9 | Alignment1 | | Alighnment1 |
| 10 | Alignment2 | | Alignment2 |
| 11 | Alignment3 | | Alignment3 |
| 12 | Alignment4 | | Alignment4 |
| 13 | Alignment5 | | Alignment5 |
| 14 | NoteCategory | | NoteCategory |
| 15 | AccountID | | Account ID |
| 16 | ContactID | | Contact ID |
| 17 | OppID | | Opportunity ID |
| 18 | Note Type | | Note Type |
| 19 | CREATED | | Date item created per store |
| 20 | FROM | | Creator of the item |
| 21 | Message | | Body of Note |
| 22 | MESSAGE CLASS | | IPM.Post.Note |
| 23 | MODIFIED | | Date item modified |

## Custom Drop Down

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| **Note Type** |  |
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## Customer Service Form

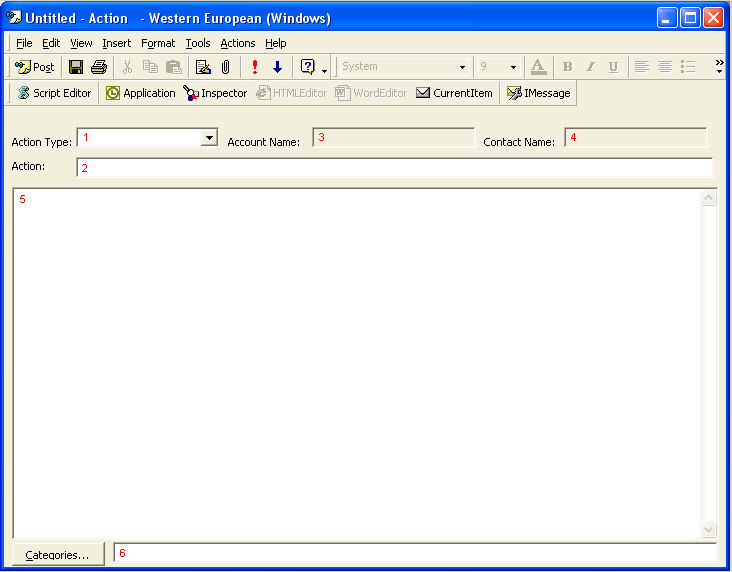


|  | Fieldname | Form Name |
| --- | --- | --- |
| 1 | Account Name | Account |
| 2 | Inquiry Type | Inquiry Type |
| 3 | Assign To | Assign To |
| 4 | Contact Name | Contact |
| 5 | BusinessPhone | Phone |
| 6 | BusinessFax | Fax |
| 7 | InquiryPriority | Priority |
| 8 | InquiryStatus | Status |
| 9 | Knowledge Base Article | Knowledge Base Article |
| 10 | Inquiry ID | (blank) |
| 11 | Date Resolved | Resolve Date |
| 12 | Created | Create Date |
| 13 | Account Manager | Account Manager |
| 14 | Team | Team |
| 15 | Total Time | Total Time |
| 16 | Subject | Problem Description |
| 17 | BODY | Problem Resolution |

The following are on the Note form but are not shown:

|  |  |  |
| --- | --- | --- |
|  | Fieldname | Form Name |
| 18 | In Folder | Current Folder |
| 19 | AccountID | Account ID |
| 20 | Alignment | Alignment |
| 21 | ContactID | Contact ID |
| 22 | Account Manager | Account Manager |
| 23 | Account | Account |
| 24 | Categories | Categories |
| 25 | Selected Item | Current Radio Button |
| 26 | MODIFIED | Date item modified |
| 27 | MESSAGE CLASS | IPM.Post.CustomerService |
| 28 | FROM | Creator of the item |
| 29 | CREATED | Date item created per store |
| 30 | Message | Body of Note |

## Actions Form

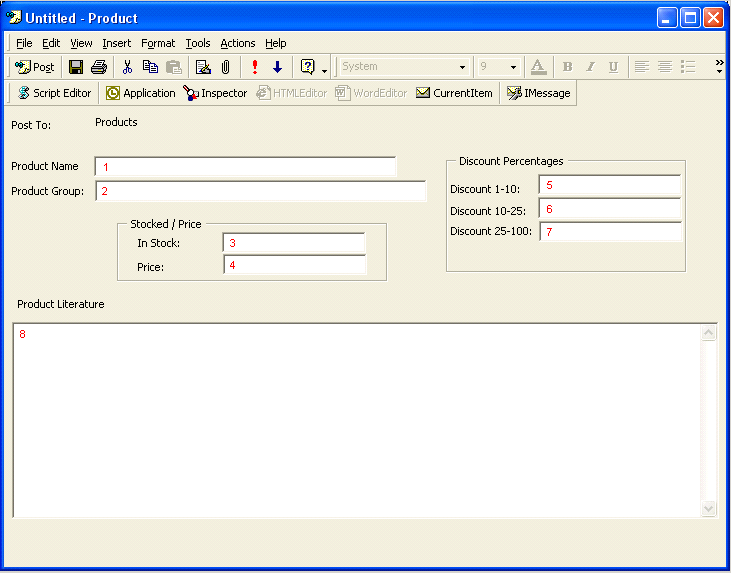


|  |  |  |
| --- | --- | --- |
|  | Fieldname | Form Name |
| 1 | Type | Action Type |
| 2 | Subject | Action |
| 3 | Account Name | Account Name |
| 4 | Contact Name | Contact Name |
| 5 | BusinessPhone | (Body of Action) |
| 6 | Categories | Categories |

The following are on the Actions form but are not shown:

|  |  |  |
| --- | --- | --- |
|  | Fieldname | Form Name |
| 7 | AccountID | Account ID |
| 8 | Alignment | Alignment |
| 9 | ContactID | Contact ID |
| 10 | CREATED | Date item created per store |
| 11 | FROM | Creator of the item |
| 12 | MESSAGE CLASS | IPM.Post.Action |
| 13 | MODIFIED | Date item modified |
| 14 | Note Type | Note Type |
| 15 | OppID | Opportunity ID |

## Products Form



|  |  |  |
| --- | --- | --- |
|  | Fieldname | Form Name |
| 1 | Subject | Product Name |
| 2 | Product Group | Product Group |
| 3 | In Stock | In Stock |
| 4 | Price | Price |
| 5 | Discount 1-10 | Discount 1-10 |
| 6 | Discount 10-25 | Discount 10-25 |
| 7 | Discount 25-100 | Discount 25-100 |
| 8 | BODY | Product Literature |

The following are on the Products form but are not shown:

|  |  |  |
| --- | --- | --- |
|  | Fieldname | Form Name |
| 9 | CREATED | Date item created per store |
| 10 | FROM | Creator of the item |
| 11 | MESSAGE CLASS | IPM.Post.Product |
| 12 | MODIFIED | Date item modified |