i360 Important Date Fields and their Object Relationship

Legend / Field Boxes:

Prospect
Welcome Email Sent Date

Lead Source
Taken On

Sources
Start (Date)
End (Date)

Source Costs
Paid On

Marketing Opportunity
Due Date
Completed Date

Appointment
Set On
Assigned On
Confirmed On
Appointment Date
Confirmation Email Sent
Cancellation Email Sent

Quote
Valid Until Date

Sale
Sold On
Net On
Paid in Full On
Final On

Receipts & Adjustments
Received

Project
Project Start Date
Project Completed Date

Purchase Order
Placed

Purchase Order Items
Received

Project Costs
Incurred

Project Activities
Due Date
Completed Date
Reminder
Start
End

Note: All records have a Created Date and a Last Modified Date. These date values are auto-populated and cannot be edited.

Relationship Legend:

- Parent Object
- Child Object
- Date Field
- Email Sent Date

Diagram nodes and connectors:

Welcome Email Sent Date → Prospects → Lead Source → Marketing Opportunity

Taken On (Lead Source)
Due Date, Completed Date (Marketing Opportunity)

Lead Source
Existing Database

"Marketing" Sources
Start (Date)
End (Date)

Paid On → Source Costs

Set Appointment → Appointment

Appointment:
Set On
Assigned On
Confirmed On
Appointment Date
Confirmation Email Sent Date
Cancellation Email Sent Date

Result Sold → Sale

Sale:
Sold On
Net On
Paid in Full On
Final On

Add Project → Project

Received → Receipts & Adjustments

Project:
Project Start Date
Project Completed Date

Project Costs (Labor & Materials)
Incurred

Project Activities (Steps for Completion):
(Task) Due Date
(Task) Completed Date
(Task) Reminder
(Appointment) Start
(Appointment) End

Valid Until → Quote

Import Quote

Products → Quote Items → Import Quote → Sale Items → Purchase Order Items

Sale Completed

Purchase Order
Placed

Purchase Order Items
Received

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