

Merge Data Source - Fields and Descriptions

Merge Data Source Fields and Definitions

Description of what each database field represents in easy to understand nomenclature. Please note some of the database fields are terminology driven and you may be using a different terminology than noted in the definitions below.

RM Merge Data Source

<u>Database Field</u>	<u>Definition</u>
CurrentDate	Current Date
proj_Desc	Company Description
job_JobID	Job/Customer Job ID (Number)
job_address1	Job/Customer Address 1
job_Bldg	Job/Customer Bldg
job_Unit	Job/Customer Unit
job_City	Job/Customer City
job_CityZone	Job/Customer City Zone
job_StateCD	Job/Customer State/Province 2 Digit Code
job_Zip	Job/Customer Zip/Postal Code
job_CityStateZip	Job/Customer City, State/Prov, Zip/PC
job_FullAddress	Job/Customer Full address in one field
job_Country	Job/Customer Country
PC_Salutation	Job Primary Contact – Salutation (Mr., Mrs., Dr., etc.)
PC_FirstName	Job Primary Contact – First Name
PC_LastName	Job Primary Contact – Last Name
PC_FullName	Job Primary Contact – Full Name
PC_Title	Job Primary Contact – Title
PC_Email	Job Primary Contact – Email Address
PC_JOB_Contact_Phone1	Job Primary Contact – Phone 1
PC_JOB_Contact_Phone1_Type	Job Primary Contact – Phone Type 1
PC_JOB_Contact_Phone2	Job Primary Contact – Phone 2
PC_JOB_Contact_Phone2_Type	Job Primary Contact – Phone Type 2
SC_FirstName	Job Secondary Contact – First Name
SC_LastName	Job Secondary Contact – Last name
SC_FullName	Job Secondary Contact – Full name
SC_Title	Job Secondary Contact – Title
SC_Email	Job Secondary Contact – Email Address
SC_JOB_Contact_Phone1	Job Secondary Contact – Phone 1
SC_JOB_Contact_Phone1_Type	Job Secondary Contact – Phone 1 Type
SC_JOB_Contact_Phone2	Job Secondary Contact – Phone 2
SC_JOB_Contact_Phone2_Type	Job Secondary Contact – Phone 2 Type
ListType	Loss/Request Type Description
job_LotBlock	Job/Customer Claim #
job_Progress	Job/Customer Progress
job_Name	Job/Customer Name
job_Custom_1	Job Custom field order 1 (Deductible)
job_Custom_2	Job Custom field order 2 (Policy Information)
job_Custom_3	Job Custom field order 3 (Loan #)
job_Custom_4	Job Custom field order 4 (Lockbox Code)
job_Custom_5	Job Custom field order 5 (Gate/Gar. Code)
job_Custom_6	Job Custom field order 6 (Other Info)

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<u>Database Field</u>	<u>Definition</u>
job_Custom_7	Job Custom field order 7
job_Custom_8	Job Custom field order 8
job_Custom_9	Job Custom field order 9
job_Custom_10	Job Custom field order 10
job_Custom_11	Job Custom field order 11
job_Custom_12	Job Custom field order 12
job_Custom_13	Job Custom field order 13
job_Custom_14	Job Custom field order 14
job_Custom_15	Job Custom field order 15
job_Custom_16	Job Custom field order 16
job_Custom_17	Job Custom field order 17
job_Custom_18	Job Custom field order 18
job_Custom_19	Job Custom field order 19
job_Custom_20	Job Custom field order 20
DateListSubmitted	Date of Loss
list_DateListOpened	Date Received
DateContacted	Date Contacted
LIST_ReviewDate	Site Inspection Appt. - Start
LIST_ReviewDateEnd	Site Inspection Appt. - End
DateEstimateDelivered	Date Estimate Uploaded
DateEstimateAccepted	Date WA/Contract Signed
LIST_RepairDate	Date scheduled for the job to start
LIST_RepairDateEnd	Date scheduled for the job to end
DateProjectedClose	Target Completion Date
list_DateListClosed	Date Closed
DateCustomKPI1	Custom Date 1
DateCustomKPI2	Custom Date 2
DateCustomKPI3	Custom Date 3
DateCustomKPI4	Custom Date 4
Staff_cont_FirstName	Typically – Estimator First Name
Staff_cont_LastName	Typically – Estimator Last Name
Staff_cont_FullName	Typically – Estimator Full Name
Staff_cont_Email	Typically – Estimator Email Address
Staff_BUILDER_Contact_Phone1	Typically Estimator - Phone 1
Staff_BUILDER_Contact_Phone1_Type	Typically Estimator - Phone Type 1
Staff_BUILDER_Contact_Phone2	Typically Estimator - Phone 2
Staff_BUILDER_Contact_Phone2_Type	Typically Estimator - Phone Type 2
Super_cont_FirstName	Typically – Project Manager First Name
Super_cont_LastName	Typically – Project Manager Last Name
Super_cont_FullName	Typically – Project Manager Full Name
Super_cont_Email	Typically – Project Manager Email Address
Super_BUILDER_Contact_Phone1	Typically Project Manager - Phone 1
Super_BUILDER_Contact_Phone1_Type	Typically Project Manager - Phone Type 1
Super_BUILDER_Contact_Phone2	Typically Project Manager - Phone 2
Super_BUILDER_Contact_Phone2_Type	Typically Project Manager - Phone Type 2

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<u>Database Field</u>	<u>Definition</u>
Staff2_FullName	Typically Lead Tech - Staff2
Staff2_Email	Typically Lead Tech - Email
Staff2_Phone1	Typically Lead Tech - Phone 1
Staff2_Phone1_Type	Typically Lead Tech - Phone 2
Staff2_Phone2	Typically Lead Tech - Phone Type 1
Staff2_Phone2_Type	Typically Lead Tech - Phone Type 2
SalesMgr_FullName	Sales Representative – Full Name
SalesMgr_Email	Sales Representative – Email Address
SalesMgr_Phone1	Sales Representative – Phone 1
SalesMgr_Phone1_Type	Sales Representative – Phone Type 1
SalesMgr_Phone2	Sales Representative – Phone 2
SalesMgr_Phone2_Type	Sales Representative – Phone Type 2
Staff4_FullName	Typically Call Taker - Staff2
Staff4_Email	Typically Call Taker - Email
Staff5_FullName	Typically Accounting - Staff2
Staff5_Email	Typically Accounting - Email
job_YearBuilt	Year Built
job_Notes	Job Notes
DATA_ReportedBy	Job – Reported By
DATA_ReferredBy	Job – Referred By
Referral_FullName	Referral – Full Name
Referral_FullAddress	Referral – Full Address
Referral_Phone1	Referral – Phone 1
Referral_Phone1_Type	Referral – Phone Type 1
Referral_Phone2	Referral – Phone 2
Referral_Phone2_Type	Referral – Phone Type 2
Referral_Email	Referral – Email
Referral_Project	Company Referral is associated with
Referral_Type	Referral Type - Description
Adjustor_FullName	Adjuster – Full Name
Adjustor_FullAddress	Adjuster – Full Address
Adjustor_Phone1	Adjuster – Phone 1
Adjustor_Phone1_Type	Adjuster – Phone Type 1
Adjustor_Phone2	Adjuster – Phone 2
Adjustor_Phone2_Type	Adjuster – Phone Type 2
Adjustor_Type	Adjuster Type – Description
Adjustor_Email	Adjuster – Email
Adjustor_Project	Company the Adjuster works for
Agent_FullName	Agent – Full Name
Agent_FullAddress	Agent – Full Address
Agent_Phone1	Agent – Phone 1
Agent_Phone1_Type	Agent – Phone Type 1
Agent_Phone2	Agent – Phone 2
Agent_Phone2_Type	Agent – Phone Type 2
Agent_Email	Agent – Email Address
Agent_Project	Company the Agent works for
Agent_Type	Agent - Type Description

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<u>Database Field</u>	<u>Definition</u>
Costs_Estimate	Total Estimated costs for the Job
Costs_Actual	Total Actual costs for the Job
JobDetermination	Reason the Job was Not Sold
Proj_Address1	Company Address 1
Proj_Address2	Company Address 2
proj_City	Company City
proj_StateCD	Company State CD/Prov CD
proj_Zip	Company Zip
proj_CityStateZip	Company City, State/Prov, Zip/PC
proj_County	Company County
proj_Country	Company Country
proj_Code	Company Code
list_ListNumber	Loss/Request Type – Numeric identified in RM
Item_DateRequested	Date item on Loss/Request was requested
Item_Request_Service	Work to be performed
Category	Detailed description of loss or Category or loss
SubCategory	Sub-Category of Loss/Request
Item_Request_ActionTaken	Action taken or follow up on the Item information/Claim
Billing_PROJC_FullName	Company Billing Contact – Full name
Billing_PROJC_Address1	Company Billing Contact - Address 1
Billing_PROJC_Address2	Company Billing Contact – Address 2
Billing_PROJC_CityStateZip	Company Billing Contact – City/State or Prov/Zip/PC
Billing_PROJC_Email	Company Billing Contact – Email Address
Billing_PROJC_Phone1	Company Billing Contact – Phone 1
Billing_PROJC_Phone1_Type	Company Billing Contact – Phone Type 1
Billing_PROJC_Phone2	Company Billing Contact – Phone 2
Billing_PROJC_Phone2_Type	Company Billing Contact – Phone Type 2
TpaProject	TPA Company
TpaContactFullName	TPA Company Contact
CustomerProjectAccountType	Defined as Customer – Account Type
Customer_ContactType	Defined as Customer - Description
Customer_FullName	Defined as Customer - Full Name
Customer_FullAddress	Defined as Customer – Full Address
Customer_Email	Defined as Customer – Email
Customer_ProjectDesc	Defined as Customer - Company
Customer_PROJECT_Contact_Phone1	Defined as Customer – Phone 1
Customer_PROJECT_Contact_Phone1_Type	Defined as Customer – Phone Type 1
Customer_PROJECT_Contact_Phone2	Defined as Customer – Phone 2
Customer_PROJECT_Contact_Phone2_Type	Defined as Customer – Phone Type 2
PC_Address1	Job Primary Contact – Address 1
PC_Address2	Job Primary Contact – Address 2
PC_City	Job Primary Contact – City
PC_StateCD	Job Primary Contact – State/Province 2 digit code
PC_Zip	Job Primary Contact – ZIP/Postal Code
PC_CityStateZip	Job Primary Contact – City, State/Prov, Zip/PC
PC_FullAddress	Job Primary Contact – Full Address
PC_JOB_Contact_Phone3	Job Primary Contact – Phone 3
PC_JOB_Contact_Phone3_Type	Job Primary Contact – Phone Type 3

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<u>Database Field</u>	<u>Definition</u>
PC_JOB_Contact_Phone4	Job Primary Contact – Phone 4
PC_JOB_Contact_Phone4_Type	Job Primary Contact – Phone Type 4
PC_JOB_Contact_Phone5	Job Primary Contact – Phone 4
PC_JOB_Contact_Phone5_Type	Job Primary Contact – Phone Type 5
PC_logon_LogonID	Job Primary Contact – Logon ID
SC_Address1	Job Secondary Contact – Address 1
SC_Address2	Job Secondary Contact – Address 2
SC_City	Job Secondary Contact - City
SC_StateCD	Job Secondary Contact – State Code
SC_Zip	Job Secondary Contact – ZIP
SC_CityStateZip	Job Secondary Contact – City, State/Prov, Zip/PC
SC_FullAddress	Job Secondary Contact – Full Address
SC_logon_LogonID	Job Secondary Contact – Logon ID
Staff6_FullName	Staff 6 – Full Name
Staff6_Email	Staff 6 - Email
Staff7_FullName	Staff 7 – Full Name
Staff7_Email	Staff 7- Email
Staff8_FullName	Staff 8 – Full Name
Staff8_Email	Staff 8 - Email
Staff9_FullName	Staff 9 – Full Name
Staff9_Email	Staff 9 - Email
Staff10_FullName	Staff 10 - Full Name
Staff10_Email	Staff 10 - Email
Staff10_Type	Staff 10 - Description
Staff11_FullName	Staff 11 - Full Name
Staff11_Email	Staff 11 - Email
Staff11_Type	Staff 11 - Description
Staff12_FullName	Staff 12 - Full Name
Staff12_Email	Staff 12 - Email
Staff12_Type	Staff 12 - Description
Staff13_FullName	Staff 13 - Full Name
Staff13_Email	Staff 13 - Email
Staff13_Type	Staff 13 - Description
Staff14_FullName	Staff 14 - Full Name
Staff14_Email	Staff 14 - Email
Staff14_Type	Staff 14 - Description
PROJECT_IndustryGroup	Company – Industry Group
PROJECT_IndustryGroupSubGroup	Company – Industry Sub Group
PROJC_FullName	Company Contact on job - Full name
PROJC_Title	Company Contact on job – Title
PROJC_Address1	Company Contact on job – Address1
PROJC_Address2	Company Contact on job – Address2
PROJC_CityStateZip	Company Contact on job – City/State or Prov/Zip/PC
PROJC_Email	Company Contact on job – Email
PROJC_Phone1	Company Contact on job – Phone 1
PROJC_Phone1_Type	Company Contact on job – Phone 1 Type
PROJC_Phone2	Company Contact on job – Phone 2
PROJC_Phone2_Type	Company Contact on job – Phone 2 Type