

Salesforce Schema Document

Platform: Salesforce | Type: Schema Design | Prepared by: RevPal

Sync Direction Legend

Icon	Meaning
W>SF	Warehouse writes to Salesforce (read-only in SF UI)
SF	Salesforce-native field (created/maintained in SF)
HS>SF	HubSpot syncs to Salesforce via connector
Calc	Formula or rollup — calculated automatically

Account (Standard Object)

Record Types

Record Type	Description
Customer	Active or former customers
Prospect	Not yet a customer
Partner	Partner organizations (AppFolio, etc.)

Custom Fields

Field Label	API Name	Type	Sync	Picklist Values / Notes
Customer ID	Customer_ID__c	Text(50)	W>SF	Acme SaaS Admin customer identifier
Account Status	Account_Status__c	Picklist	W>SF	Active , Not Live , Churned , Pilot , Opportunity Active
Segment	Segment__c	Picklist	SF	SMB , Mid-Market , Enterprise
Tier	Tier__c	Picklist	SF	Core , Core Boost , Core Premium
Total Door Count	Total_Door_Count__c	Number(10,0)	W>SF	Total doors across all markets
Active Product Lines	Active_Product_Lines__c	Text(255)	Calc	Flow-stamped from active Opp Products
Territory	Territory__c	Picklist	SF	East , Central , West
Franchise Group	Franchise_Group__c	Lookup(Account)	SF	Links to parent franchise organization

Partner Tier	Partner_Tier__c	Picklist	SF	Referral , Reseller , Strategic — Partner RT only
Partner Agreement Type	Partner_Agreement_Type__c	Picklist	SF	Referral , Co-Sell , Reseller — Partner RT only
Partner Agreement Start	Partner_Agreement_Start__c	Date	SF	Partner RT only
Partner Agreement End	Partner_Agreement_End__c	Date	SF	Partner RT only
Partner Comp Terms	Partner_Comp_Terms__c	Text Area	SF	Partner RT only
Partner Manager	Partner_Manager__c	Lookup(User)	SF	Partner RT only
Partner Status	Partner_Status__c	Picklist	SF	Active , Inactive — Partner RT only

Qualification Status	Qualification_Status__c	Picklist	SF	Disqualified - Out of Business , Disqualified - Not in ICP , Disqualified - Not in SAM — used for data quality triage during import (1,087 OOB, 26 Not in ICP, 117 Not in SAM as of 2026-03-14)
HubSpot Company ID	HubSpot_Company_ID__c	Text	SF	HubSpot Company object ID — used for cross-platform record matching (13,320 Accounts populated as of 2026-03-14)
Duplicate Survivor	Duplicate_Survivor__c	Checkbox	SF	Marks the surviving record in a duplicate cluster. Default false. Set true on the account selected as canonical during dedup analysis.

Duplicate IDs	<code>Duplicate_IDs__c</code>	LongTextArea(131072)	SF	Semicolon-delimited list of Salesforce Account IDs that are duplicates of this survivor record. Only populated on survivor records.
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Standard Fields Used

Note: `ParentId` (standard Account hierarchy lookup) is now actively used for regional office nesting. Non-HQ regional offices point to their HQ parent account.

Field	Usage
<code>Name</code>	Account name
<code>Type</code>	Account type — restricted by Record Type (see below)
<code>OwnerId</code>	Primary account owner (typically AM for customers, AE for prospects)
<code>ParentId</code>	Parent account for hierarchy (economic entity > operational units)
<code>BillingState</code>	Full state name (e.g., "California") for territory routing
<code>Industry</code>	Standard industry classification
<code>Phone</code> , <code>Website</code>	Standard contact info

Account.Type Picklist (Record-Type Restricted)

The standard `Type` field is restricted per Record Type to enforce consistent categorization:

Record Type	Allowed Values	Default
Prospect	Prospect	Prospect
Customer	Active Customer , Former Customer	(none)
Partner	Partner	Partner

Note: The StandardValueSet contains 12 total values (10 original + **Active Customer** and **Former Customer**). Only the values listed above are available per Record Type. The default Account Record Type for all profiles is **Prospect**.

Account Team Roles

Role	Description
AE - New Business	Account Executive for new logo acquisition
AM - Regional	Regional Account Manager (East/Central/West)
AM - National	National Account Manager
BDR	Business Development Rep
COM	Customer Onboarding Manager
Partner Manager	Manages partner relationship

Contact (Standard Object)

Custom Fields

Field Label	API Name	Type	Sync	Picklist Values / Notes
Contact Role	Contact_Role__c	Picklist	SF	Decision Maker , Influencer , Champion , End User , Billing , Technical
Recent Conversion Date	Recent_Conversion_Date__c	DateTime	HS>SF	Timestamp of most recent HubSpot form submission / hand-raise
Demand Funnel Stage	Demand_Funnel_Stage__c	Picklist	Calc	Suspect , Engaged , MQL , SAL , SQO , Customer — high watermark, never regresses. Flow-stamped based on lifecycle triggers.

Prospect Status	Prospect_Status__c	Picklist	SF	Open , Attempting Contact , Connected , Scheduled , Qualified , Disqualified , Recycled
Qualification Status	Qualification_Status__c	Picklist	SF	Bounced , Competitor , Wrong Person , No Longer at Company , Incorrect Routing , Unsubscribed , Unresponsive to Sales , Unresponsive to Nurture
MQL Type	MQL_Type__c	Picklist	Calc	MQL-A (explicit hand-raiser: Contact Us, Request Demo), MQL-B (scoring threshold: ICP fit + engagement)
MQL Date	MQL_Date__c	DateTime	Calc	Timestamp when Contact first reached MQL stage

SAL Date	SAL_Date__ c	DateTime	Calc	Timestamp when first Opportunity created (Stage 0)
SQO Date	SQO_Date__ c	DateTime	Calc	Timestamp when Opportunity first reached Stage 1
First Touch Campaign	First_Touch_Campaign__ c	Lookup(Campaign)	Calc	First campaign enrollment — set once, never overwritten
Last Touch Campaign	Last_Touch_Campaign__ c	Lookup(Campaign)	Calc	Most recent campaign enrollment — updated on every CampaignMember create
First Touch Campaign Date	First_Touch_Campaign_Date__ c	Date	Calc	Date of first campaign enrollment
Last Touch Campaign Date	Last_Touch_Campaign_Date__ c	Date	Calc	Date of most recent campaign enrollment

Standard Fields Used

Field	Usage
AccountId	Required — no unowned contacts
OwnerId	Required at creation
Email	Primary dedup key
Title	Job title
MailingState	Note: NOT reliably populated in HubSpot. Use Account.BillingState for state-based logic.

Lead (Standard Object)

Note: Leads are used only for outbound/BDR-sourced prospects created natively in SF. All inbound hand-raisers from HubSpot arrive as Contacts on Accounts.

Custom Fields

Field Label	API Name	Type	Sync	Picklist Values / Notes
Door Count	Door_Count__c	Number(10,0)	SF	Self-reported or enriched
Partner Account	Partner_Account__c	Lookup(Account)	SF	Links to Partner Account Record Type
Partner Sourced	Partner_Sourced__c	Checkbox	SF	True if lead came from a partner
Disqualification Reason	Disqualification_Reason__c	Picklist	SF	Too Few Doors (<100) , Not in Market , Duplicate , Wrong Fit / Pro Inquiry
Auto DQ	Auto_DQ__c	Checkbox	Calc	Formula: Door_Count__c < 100

Standard Fields Used

Field	Usage
OwnerId	Assigned via Lead Assignment Rules
LeadSource	Outbound - BDR , Partner Referral , Event , Inbound - Website , Outbound - List
State	Full state name for territory routing
Company	Company name
Status	New (→ Open), Contacted (→ Attempting Contact), Qualified (→ Scheduled, converts to Contact), Disqualified (→ Disqualified), Converted (→ conversion event). Values aligned with Contact Prospect Status for consistent reporting post-conversion.

Lead Assignment Rules

Condition	Assignment
State IN (East territory states)	East AE (round-robin or specific)
State IN (Central territory states)	Central AE
State IN (West territory states)	West AE
Door_Count__c < 100	Auto-DQ (no assignment)

Opportunity (Standard Object)

Record Types

Record Type	API Name	Sales Process	Description
New Business	New_Business	New Business Process	New logo acquisition
Amendment	Amendment	Amendment Process	Expansions, upgrades, cross-sells
Renewal	Renewal	Renewal Process	Contract renewals

Sales Processes

New Business Process:

Stage	API Name	Probability	Required Fields at Exit
Qualify	Qualify	10%	Door count, market, decision-maker
Discovery	Discovery	20%	Needs confirmed, product fit
Negotiating	Negotiating	50%	Proposal sent
Contract Signed	Contract_Signed	90%	Contract executed (manual confirmation until PandaDoc is connected)
Closed Won	Closed_Won	100%	Amount > 0, Product Lines added
Closed Lost	Closed_Lost	0%	Closed_Lost_Reason__c required

Amendment Process:

Stage	API Name	Probability	Required Fields at Exit
Amendment Identified	Amendment_Identified	10%	Amendment_Type__c
Scoping	Scoping	25%	Scope defined
Proposal	Proposal	50%	Proposal delivered
Negotiating	Negotiating	75%	—
Closed Won	Closed_Won	100%	Amount > 0
Closed Lost	Closed_Lost	0%	Closed_Lost_Reason__c required

Renewal Process:

Stage	API Name	Probability	Required Fields at Exit
Pre-Renewal	Pre_Renewal	80%	Auto-created
Renewal Discussion	Renewal_Discussion	70%	—
Proposal Sent	Proposal_Sent	80%	—
Negotiating	Negotiating	85%	—
Closed Won	Closed_Won	100%	Amount > 0
Closed Lost	Closed_Lost	0%	Closed_Lost_Reason__c required (= churn)

Custom Fields

Field Label	API Name	Type	Sync	Picklist Values / Notes
Predicted GMV	Predicted_GMV__c	Currency	SF/Calc	Door count x work orders x commitment % x avg GMV per job
Contract Value	Contract_Value__c	Currency	W>SF	Actual contract value from PandaDoc/warehouse
RevOps Override	RevOps_Override__c	Currency	SF	Manual override by RevOps only
Master Amount	Amount	Currency	Calc	Flow-stamped: Override > Contract > Predicted. Record-triggered flow fires on create/edit of source fields. Preserves point-in-time values.
Closed Lost Reason	Closed_Lost_Reason__c	Picklist	SF	Context-aware values per Record Type (see below)
Competitor Name	Competitor_Name__c	Text(100)	SF	Required when Closed Lost Reason contains "Competitor"

Amendment Type	Amendment_Type__c	Picklist	SF	Market Expansion , Product/Service Line Expansion , Door Count Expansion , Tier Upgrade
Pilot Status	Pilot_Status__c	Picklist	SF	Pilot Proposed , Pilot Active , Pilot Complete , Pilot Failed
Pilot Start Date	Pilot_Start_Date__c	Date	SF	—
Pilot End Date	Pilot_End_Date__c	Date	SF	—
BDR Source	BDR_Source__c	Lookup(User)	SF	Persistent BDR attribution (survives ownership transfer)
BDR Meeting Set Date	BDR_Meeting_Set_Date__c	DateTime	Calc	Auto-stamped at Opp creation if BDR creates it
Partner Account	Partner_Account__c	Lookup(Account)	SF	Links to Partner Account Record Type
Partner Sourced	Partner_Sourced__c	Checkbox	SF	True if partner-sourced

Partner Revenue Share	Partner_Revenue_Share__c	Currency	SF	Calculated partner comp amount
Forecast Category	ForecastCategoryName	Picklist	SF	Pipeline , Best Case , Commit , Closed , Omit
Product Type	Product_Type__c	Picklist	SF	Core , Core Boost , Core Premium , Product B , Product C , ProductD — Primary product
Contract End Date	Contract_End_Date__c	Date	SF	For renewal automation trigger
Days in Stage	Days_in_Stage__c	Number	Calc	Formula: TODAY() - LastStageChangeDate
Stall Alert	Stall_Alert__c	Checkbox	Calc	Flow-set when Days_in_Stage exceeds SLA
DFP Stage 1 Date	DFP_Stage_1_Date__c	DateTime	Calc	Auto-stamped when Opp first reaches Stage 1 (SQO marker for demand funnel)

Primary Contact	Primary_Contact__c	Lookup(Contact)	SF	Required on creation (except Renewals). Links to the primary contact for this opportunity.
Attribution Campaign	Attribution_Campaign__c	Lookup(Campaign)	Calc	Auto-stamped from Contact's Last Touch Campaign at Opp creation
Attribution Campaign Date	Attribution_Campaign_Date__c	Date	Calc	Auto-stamped from Contact's Last Touch Campaign Date at Opp creation

Closed Lost Reason Picklist Values (Dependent on Record Type)

New Business:

- Unqualified – Too Few Doors
- Unqualified – Not in Market
- Unqualified – No Decision-Making Authority
- Unqualified – Wrong Fit / Pro Inquiry
- Timing – Not Ready Now
- Went with Competitor
- Went with Internal Solution
- Cost / Budget Constraints
- Unresponsive / No Response to Outreach

Amendment:

- Customer Service Issues
- No Growth / Expansion Need
- Budget Constraints / Downsizing
- Competitor Displacement
- Timing – Not Ready for Expansion

Renewal (= Churn):

- Churned to Competitor
- Customer Service Issues
- Poor Product / Service Experience
- Company Acquisition / Merger
- Downsizing Budget / Cost Optimization
- Went with Internal Solution
- No Longer Need Service

Contract (Standard Object)

Custom Fields

Field Label	API Name	Type	Sync	Notes
Contract Type	Contract_Ty pe__c	Picklist	SF	New , Renewal , Amendment
Annual Value	Annual_Valu e__c	Currency	SF	Annual contract value
Commitment Percentage	Commitment_ Percentage_ _c	Percent	SF	25% (Core), 50% (Core Boost), 75% (Core Premium)
Auto-Renew	Auto_Renew_ _c	Checkbox	SF	Whether contract auto- renews

Standard Fields Used

Field	Usage
AccountId	Parent account
StartDate	Contract start
EndDate	Contract end — triggers renewal Opp creation
Status	Draft , Activated , Expired
ContractTerm	Length in months

Market__c (Custom Object)

Field Label	API Name	Type	Sync	Notes
Market Name	Name	Text(80)	SF	e.g., "Austin, TX", "Denver, CO"
Acme SaaS Serves Market	Client_Serves_Market__c	Checkbox	SF	Whether Acme SaaS actively serves this market
Territory	Territory__c	Picklist	SF	East , Central , West
Product Availability	Product_Availability__c	Multi-Select Picklist	SF	Core , Product B , Product C , ProductD — which products are available in this market (~10 of ~50 markets have Product B)
Active Account Count	Active_Account_Count__c	Number	Calc	Rollup from Account_Market__c where Status = Active

Account_Market__c (Junction Object)

Field Label	API Name	Type	Sync	Notes
Account	Account__c	Master-Detail(Account)	SF	—
Market	Market__c	Master-Detail(Market__c)	SF	—
Status	Status__c	Picklist	W>SF	Active (sending jobs), In-Market (not yet active), Not Served
Job Volume	Job_Volume__c	Number(10,0)	W>SF	Monthly job count from warehouse
Door Count	Door_Count__c	Number(10,0)	W>SF	Doors in this specific market

Product2 (Standard Object — Products)

Product Name	Product Code	Product Family	Description
Core	CORE	Core	Standard maintenance service
Core Boost	CORE_BOOST	Core	50% commitment tier
Core Premium	CORE_PREMIUM	Core	75% commitment tier
Product B	MAKE_READY	Product B	Turn/renovation service
Product C	FORESIGHT	Product C	Predictive maintenance platform
ProductD	LUMI	ProductD	SaaS add-on

Validation Rules Summary

Object	Rule	Logic
Opportunity	Amount Required at Discovery+	StageName <> 'Qualify' && Amount = 0 → error
Opportunity	Closed Lost Reason Required	IsClosed && !IsWon && ISBLANK(Closed_Lost_Reason__c) → error
Opportunity	Competitor Name Required	CONTAINS(Closed_Lost_Reason__c, 'Competitor') && ISBLANK(Competitor_Name__c) → error
Opportunity	Product Lines Required at Closed Won	IsWon && OpportunityLineItems = 0 → error
Lead	Owner Required	Enforced by assignment rules
Contact	Account Required	ISBLANK(AccountId) → error
Opportunity	Require Primary Contact	ISNEW() && ISBLANK(Primary_Contact__c) && RT != Renewal → error

Flow Automation Summary

Flow	Object	Trigger	Action
Auto-Renewal Creation	Opportunity	Closed Won on New Business or Amendment	Create Renewal Opp with Pre-Renewal stage, copy Contract End Date
GMV Amount Hierarchy	Opportunity	On Create/Edit (source fields)	Calculate Amount = Override > Contract > Predicted; stamp on standard Amount field
BDR Meeting Set Stamp	Opportunity	On Create	If creator's role = BDR, stamp <code>BDR_Source__c</code> and <code>BDR_Meeting_Set_Date__c</code>
Stall Detection	Opportunity	Scheduled (daily)	If Days_in_Stage > SLA per stage, set <code>Stall_Alert__c</code> = true
Lead Auto-DQ	Lead	On Create/Update	If Door_Count__c < 100, set Status = Disqualified
Active Product Lines	Account	Opportunity Product change	Update <code>Active_Product_Lines__c</code> text from active Opp Products
Demand Funnel — Suspect Default	Contact	On Create	Set <code>Demand_Funnel_Stage__c</code> = Suspect if blank
Demand Funnel — Engaged	Contact	Campaign Member created, OR web activity detected	Set stage = Engaged (only if current stage < Engaged)

Demand Funnel — MQL-A	Contact	Form submission / demo request	Set stage = MQL, <code>MQL_Type__c</code> = MQL-A, stamp <code>MQL_Date__c</code>
Demand Funnel — SAL	Opportunity + OpportunityContact Role	On Opp Create OR Primary OCR Create	Set Contact's stage = SAL, stamp <code>SAL_Date__c</code> (only if current stage < SAL). Two flows: <code>DF_SAL</code> (Opp trigger) + <code>DF_SAL_OCR</code> (OCR trigger) — OCR trigger is the primary path since OCRs are typically created after the Opportunity.
Demand Funnel — SQO	Opportunity	Stage changes to Stage 1+	Set Contact's stage = SQO, stamp <code>SQO_Date__c</code> , stamp <code>DFP_Stage_1_Date__c</code> on Opp
Demand Funnel — Customer	Opportunity	Closed Won	Set Contact's stage = Customer (only if current stage < Customer)
Prospect Status — Open	Contact	Owner changed	Set <code>Prospect_Status__c</code> = Open
Prospect Status — Recycle/DQ	Contact	Manual or automated trigger	Set <code>Prospect_Status__c</code> + <code>Qualification_Status__c</code> with reason

Campaign Data Handler	CampaignMember	On Create	Set Contact's First Touch Campaign (if blank) + always update Last Touch Campaign and dates
Opp Attribution Stamp	Opportunity	On Create (where Primary Contact populated)	Copy Contact's Last Touch Campaign → Opportunity Attribution Campaign + Date

Pending: Warehouse Field Documentation

Action Item: Client RevOps Lead to share warehouse field documentation for additional fields that the warehouse team needs surfaced in Salesforce. This may expand the Warehouse Integration Fields section below.

Warehouse Integration Fields — Quick Reference

All fields the warehouse team needs to populate:

Object	API Name	Type	Frequency
Account	Customer_ID__c	Text(50)	On creation
Account	Account_Status__c	Picklist	Nightly
Account	Total_Door_Count__c	Number	Nightly
Opportunity	Contract_Value__c	Currency	On contract execution
Account_Market__c	Status__c	Picklist	Nightly
Account_Market__c	Job_Volume__c	Number	Nightly
Account_Market__c	Door_Count__c	Number	Nightly