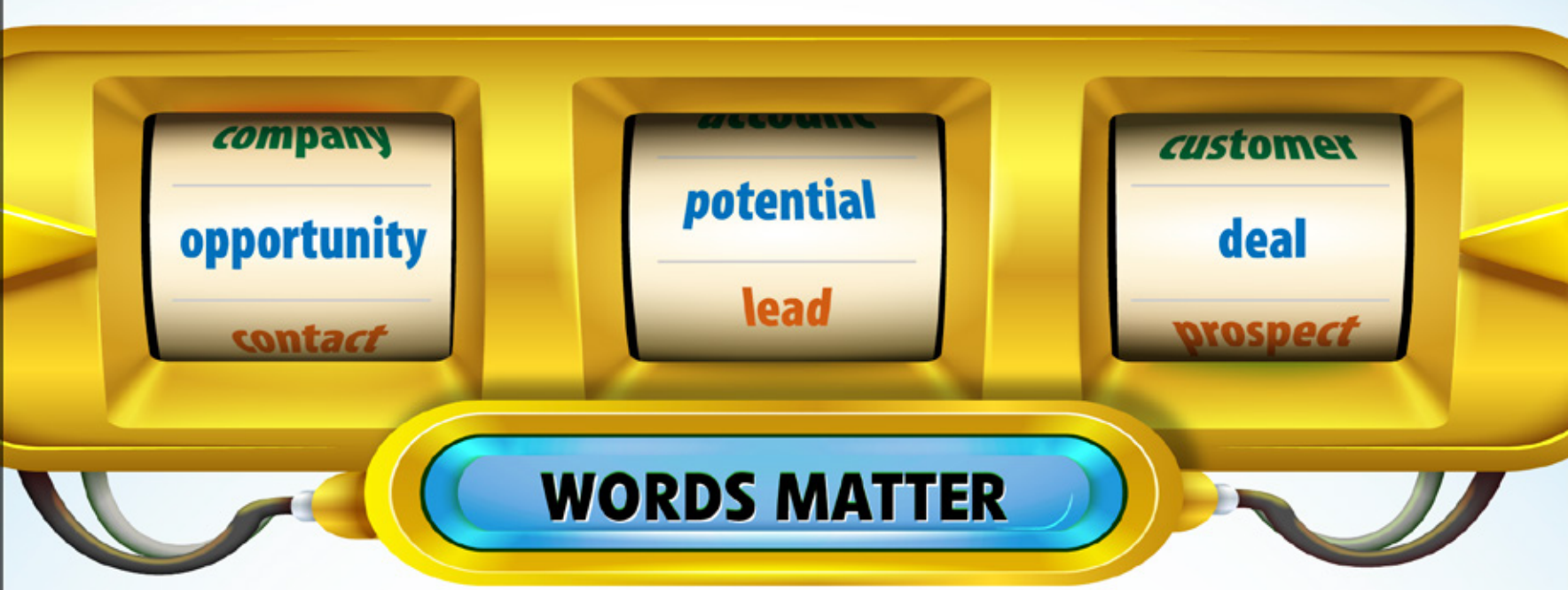


When Integrating Your Cloud Systems,



Unique Terminology of SaaS Systems

CRM	Owner	Contact	Company	Opportunity	Activity	Ticket	Campaign
BedrockData	Owner	Contact	Company	Opportunity	Activity	Ticket	Campaign
salesforce	User	Lead & Contact	Account	Opportunity	Task	Case	Campaign
NETSUITE	Employee	Lead & Customer & Contact	Lead & Customer	Opportunity	Calendar Event	Case	Campaign
Microsoft	SystemUser	Lead & Contact	Account	Opportunity	Activity	Incident	Campaign
SUGARCRM	User	Lead & Contact	Account	Opportunity	Activity	Case	Campaign
Zoho CRM	-	Lead & Contact	Account	Potential	Task	Case	Campaign
Vtiger	-	Lead & Contact	Account	Potential	Activity	Ticket	Campaign
PipelineDeals	User	Person	Company	Deal	Note (API) & Activity (UI)	-	-
pipedrive	User	Lead & Contact	Account	Deal	Note	-	-
BASE	User	Lead & Contact	Account	Deal	Note	-	-
Batchbook	User	Person	Company	Deal	Communication	-	-
Capsule	User	Person	Organisation	Opportunity	Task	Case	-
Highrise	User	Person	Company	Deal	Task	Case	-
insightly	User	Lead & Contact	Organization	Opportunity	Task	-	-
LEADMASTER	SalesRep	Lead	-	Opportunity	-	-	-
nimble	-	Contact	Company	-	Activity	-	-
solve	-	Contact	Company	-	Activity	-	-
suiteCRM	User	Lead & Contact	Account	Opportunity	Activity	Case	-
WORK[etc]	Owner	Lead & Contact	Company	Opportunity	-	Case	-

Most creative label for an Opportunity: Zoho and Vtiger refer to it as *Potential*

Marketing Automation	Owner	Contact	Company	Opportunity	Activity	Ticket	Campaign
HubSpot	Owner	Contact	Company	Deal	Engagement	-	Campaign
Marketo	-	Lead	Company	Opportunity	Activity or Interesting Moment	-	Program
eloqua	User	Contact	Account	-	Activity	-	Campaign
salesforce pardot	User	Prospect	Identified Company or Prospect Account	Opportunity	Visitor Activity	-	Campaign
act-on	-	Contact	Account	-	Fact	-	Email Campaign
Infusionsoft	-	Contact	Company	Order	-	-	-
Contact	-	Contact	-	-	-	-	-
Engagio	Player	Person	Account	Opportunity	Engagement	-	Play

A wave of CRMs refer to Opportunities as Deals: PipelineDeals, PipeDrive, Base CRM, Batchbook, Highrise & HubSpot

Email	Owner	Contact	Company	Opportunity	Activity	Ticket	Campaign
Constant Contact	User	Contact	-	-	-	-	Email Campaign
MailChimp	Subscriber	-	-	-	-	-	-
AWeber	Subscriber	-	-	-	-	-	Campaign
Campaign Monitor	Subscriber	-	-	-	-	-	Campaign

Marketo uses the label Program for what most other Marketing Automation and CRMs refer to as a *Campaign*.

Contact Discovery & Enrichment	Owner	Contact	Company	Opportunity	Activity	Ticket	Campaign
DiscoverOrg	-	Contact	Company	-	-	-	-
AVENTION	-	Contact	Company	-	-	-	-
Oceanos	-	Contact	Company	-	-	-	-
RainKing	-	Contact	Company	-	-	-	-
zoominfo	-	Person	Company	-	-	-	-
InsideView	-	Person	Company	-	-	-	-
salesforce data.com	-	Contact	Company	-	-	-	-
LEADGNOME	-	Lead	Account	-	-	-	-
leadspace	-	Contact	Company	-	-	-	-

NetSuite is the only system that refers to the Company with whom you do business as a Customer (most are *Company* or *Account*).

Tele	Owner	Contact	Company	Opportunity	Activity	Ticket	Campaign
PhoneBurner	-	Contact	Account	-	Task	-	-
quota factory	-	Contact	Account	-	Task	-	-

Pardot is the only system that refers to a Lead as a Prospect.

Webinars & Events	Owner	Contact	Company	Opportunity	Activity	Ticket	Campaign
cvent	-	Contact	Company	-	Event	-	-
Eventbrite	-	Attendee	-	-	Order	-	-
GoToWebinar	-	Registrant	-	-	Webinar	-	-
ON24	-	Registrant	-	-	Event	-	-
ReadyTalk	-	Registrant	-	-	Meeting	-	-
universe	-	Attendee	-	-	Event	-	-
Cisco Webex	-	Attendee	-	-	History	-	-
Attend	-	Contact	Company	-	Event	-	-

In some Support systems (Intercom, Help Scout) the User is the person providing support (aka Agent) while in others (Freshdesk, Zendesk) it's the person seeking support (aka Customer)

Support	Owner	Contact	Company	Opportunity	Activity	Ticket	Campaign
ConnectWise	Member	Contact	Company	Opportunity	Activity	Ticket	-
INTERCOM	User	Contact	Company	-	Note	Conversation	-
salesforce desk	-	Customer	Company	-	-	Case	-
freshdesk	Agent	User	Company	-	-	Ticket	-
Help Scout	User	Customer	-	-	-	Conversation	-
zendesk	Agent	User	Organization	-	-	Ticket	-

The range of labels for Support inquiries are Cases (many, including Salesforce), **Tickets** (ConnectWise, FreshDesk, ZenDesk), **Incidents** (Dynamics) & **Conversations** (Intercom & Help Scout).

eCommerce	Owner	Contact	Company	Opportunity	Activity	Ticket	Campaign
shopify	-	Customer	-	Order	-	-	-
Magento	-	Customer	-	Order	-	-	-
BIGCOMMERCE	-	Customer	-	Order	-	-	-
spree commerce	-	Customer	-	Order	-	-	-
Volusion	-	Customer	-	Order	-	-	-
WOO COMMERCE	-	Customer	-	Order	-	-	-

Activities have the widest range of labels, including: Note (Base CRM), Communication (Batchbook), Engagement (HubSpot) and even a *Fact* (Act-on)

Payments	Owner	Contact	Company	Opportunity	Activity	Ticket	Campaign
Chargebee	-	Customer	-	Order	Event	-	-
Recurly	-	Account	-	-	-	-	-
stripe	-	Customer	-	Order	Event	-	-
zuora	-	Account	-	-	-	-	-

The APIs that have the most fun: Capsule CRM & Highrise have an official object term "Party" which they use to encompass both People and Companies.

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