

CRM Deal Fields

#	Field	#	Field	#	Field
1	Company Name	51	Initial Contact Method	101	PY-1 EBITDA
2	City	52	IOI Bid Date	102	PY Total Capex
3	State	53	IOI Bid Date Legacy	103	PY-2 Revenue
4	Transaction Type	54	Favorable Tax Structure	104	Reason for Passing
5	Firm Status	55	Future Contact Date	105	Recurring / Consumable Demand
6	Deal Stage	56	IOI Equity	106	PY-1 Revenue
7	PY Revenue	57	IOI Bid Range	107	Risks
8	PY EBITDA	58	IOI Issued?	108	Secondary Deal Source Individuals
9	Primary Deal Source Individual	59	LOI Bid Range	109	Secondary Deal Sources
10	Primary Deal Source	60	Linked to PitchBook	110	Secondary Industries
11	Primary Industry	61	LOI Bid Date	111	Secondary Sectors
12	180 Day Review Date	62	Management Visit Date	112	Sell Side Owners
13	Designated Market	63	LOI Equity	113	Source Type
14	3 Year Revenue CAGR	64	Locations	114	Summary Business Description
15	Equity Investment	65	Management Ownership	115	Theme
16	Business Description	66	Mid Course Review Date	116	Ticker
17	Address	67	Office Fax	117	Total Equity Investment
18	Attachments	68	LOI Bid Date Legacy	118	Transaction Goals/Mgmt Transition
19	CapIQld	69	LOI Issued?	119	Website
20	Closing Equity	70	Mezz. Debt Details	120	Winning Bid
21	Business Model	71	Last Contact Date	121	Winning Firm
22	Comments/Next Steps	72	Mezz. Financing Source(s)	122	Created By
23	Closing Bid	73	Open Date	123	Senior Debt Details
24	CY EBITDA Margin	74	New Deal Date	124	Modified By
25	Company Key	75	Points of Interest	125	Modified Date
26	Customers/Concentration	76	Passed Date	126	Created Date
27	Country	77	Portfolio Company Add-On	127	Total Funded Debt
28	Company Type	78	Postal Code	128	Total Revolver Availability
29	Confidential	79	On Hold Date	129	Visited Management?
30	CY Capex % EBITDA	80	Other Debt		
31	CY EBITDA Range	81	Office Phone		
32	Date Closed	82	Other Investor Ownership		
33	CY NWC % Revenue	83	Primary Contact		
34	CY Capex % Revenue	84	Pre-IOI Review Date		
35	CY EBITDA	85	Port Co Example		
36	CY NWC % EBITDA	86	Primary Sector		
37	CY Total Capex	87	Project Name		
38	EBITDA Leverage	88	Pre-LOI Diligence Date		
39	Date Received	89	PitchBook ID		
40	EBITDA Range	90	PY Capex % Revenue		
41	CY Total NWC	91	PY Capex % EBITDA		
42	Date Closed Legacy	92	PY EBITDA Margin		
43	Deal Team	93	Pre-IOI Review and Later		
44	Final IC Date	94	PY EBITDA Range		
45	Favorable Sale Process	95	PY FCF % EBITDA		
46	Fund	96	PY FCF % Revenue		
47	Fund Ownership	97	PY NWC % EBITDA		
48	CY Revenue	98	PY NWC % Revenue		
49	Investment Thesis	99	PY Total FCF		
50	Firm Source	100	PY Total NWC		

CRM Contact Fields

#	Field	#	Field
1	Full Name	39	Fax
2	Contact Type	40	Home Phone
3	Priority	41	Industry 1 Temp
4	Company	42	Institution Tier
5	Primary Industry	43	Home Address
6	Office Phone-OLD	44	Initial Meeting Date
7	E-mail	45	First Name
8	City	46	Job Title
9	State	47	Last Name
10	Last Contact Date	48	Industry 2 Temp
11	Designated Market	49	LinkedIn Profile URL
12	Address Line 1- OLD	50	Mobile Phone
13	Address Line 2	51	Middle Name
14	Assistant	52	Personal Notes
15	Assistant Phone	53	Notes
16	Attachments	54	Postal Code
17	Bio	55	Primary Sector
18	Board Memberships	56	Referred by
19	Company Name Phone	57	Relevant Deals
20	Company Text	58	Salutation
21	Address Line 1	59	Secondary Industries
22	Contact Frequency	60	Secondary Sectors
23	Contact ID	61	Theme
24	Contact Method	62	Unsubscribed
25	Company website	63	Update Contact Email Date
26	Contact Owner	64	Created By
27	Contact Updated Date	65	Valid Email
28	Co-owners	66	Modified By
29	Country	67	Created Date
30	Current Role	68	Modified Date
31	Confidential		
32	Delete		
33	Department		
34	Office Phone		
35	DC Import ID		
36	E-Mail 2		
37	Groups		
38	Future Contact Date		