

PocketBrief Data Requirements				
Table	Field Name	Required	Key	Description
Customer	CustNo	Y	Y	Unique customer identifier
	CustName	Y		
	City			
	State			
	ZipCode			
	PhoneAreaCd			
	Phone			
	Contact			Primary contact name
	Contract			Any special pricing code, tier, matrix level, etc.
	TerrNo	Y	Y	Primary sales rep (customer "owner")
	AmtCur			Current amount owed by customer (within 30 days)
	Amt30D			Amount owed by customer (within 30-60 days)
	Amt60D			Amount owed by customer (within 60-90 days)
	Amt90D			Amount owed by customer (within 90-120 days)
	Amt120			Amount owed by customer (within 120-150 days)
	AmtOvr			Amount owed by customer (over 150 days)
AmtDue			Total amount owed by customer	
CustNoParent			CustNo of parent customer (if this customer is a "child" account)	
Type			Open field (used for other descriptive customer information)	
Market			Primary customer market	
CompanyNotes			This field will be displayed every time user views the customer	
Customer Table Notes: If "Amt*" fields included, then OpenInvoices table required				
History (12 or 24 months)	CustNo	Y	Y	Unique customer identifier
	ItemNo	Y	Y	Unique item identifier
	OrdNo	Y	Y	Order number (usually same as invoice number)
	OrdType	Y		Such as SO for sales order, CR for credit, etc.
	OrdStat	Y		I = invoiced; O = open order
	OrdDate	Y		Date order placed in system
	InvDate	Y		Date of invoice (if OrdStat = O, then null)
	InvNo	Y	Y	Invoice number (if OrdStat = O, then null)
	UM			Unit of measure
	QtyOrd			Quantity ordered
	QtyShip	Y		Quantity shipped
	UnitPrice	Y		Unit price (as invoiced to the customer)
	UnitCost	Y		Unit cost (after cost adjustments)
	UnitRebate			Unit cost adjustment (if any)
	PriceCode	Y		How item was priced (Level 1, 2, etc. or Matrix A, B, etc.)
	CostSource			How item's cost was derived (ex: if cost is rebated, show rebate ID)
Item	ItemNo	Y	Y	Unique item identifier (for multiple branches, include branch prefix)
	ItemDesc	Y		Item description
	Vendor			Vendor abbreviation
	Catalog			Vendor catalog number
	UM	Y		Unit of measure
	ConvFact			How many "each's" in the UM
	ProdCd			Product category code
	UnitCost	Y		Unit cost (per the unit of measure)
	QtyAvail			Current quantity available
	UnitPriceHigh	Y		Generic "list" price
	UnitPriceQtyBreak			Optimal purchase quantity
	UnitPriceLow			Secondary "list" price (for more competitive situations)
	ItemNoSub			Item number of possible alternate/substitute item
ItemType			Open field (used for other descriptive information of item)	
ImportantItem			Value: Y = include item regardless of whether or not item part of territory sales history	
OpenInvoices (not required)	CustNo	Y	Y	Unique customer identifier
	InvNo	Y	Y	Invoice reference (matches invoice number in sales history)
	InvDate	Y		Invoice date
	Amt	Y		Amount owed by customer corresponding to the AgeCd
	AgeCd	Y		Codes Include: Cur, 30, 60, 90, 120, Ovr150
	TransCd			Description of transactions such as: Invoice, Adjustment, Service, etc.
TerritoryInfo	TerrNo	Y	Y	Unique territory identifier
	RepName	Y		Sales representative name
	RepCity			Sales representative city

General Notes: 1) File type CSV (delimited), 2) Date format "mm/dd/yyyy"