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Standard Objects Overview

Following standard Salesforce Objects are used by the ClosePlan application.

Standard Object	Custom Fields Total	Custom Fields Lookup Fields	Custom Fields Rollup Summary Fields	Triggers
User	0	0	0	1
Account	1	0	0	1
Account Team Member	0	0	0	0
Contact	9	0	0	0
Opportunity	6	1	1	1
Opportunity Team Member	2	0	0	1
Opportunity Contact Role	1	0	0	1
Activity (Task/Event)	1	1	0	0
ContentVersion / *ContentDocumentLink	1	0	0	*1

Standard Objects in Detail

User Object

Used Standard Fields

Name, SmallPhotoUrl

Triggers

Name	Description
TSPC.User	Fires after update. Automatically removes ClosePlan license and related Permission Sets on user deactivation.

Account Object

Used Standard Fields

Name, ParentId, RoleId, Email

Added Custom Fields

Field API Name	Type	Description
TSPC__PhotoUrl__c	Text(255)	Stores Account logo url

Triggers

Name	Description
TSPC.Account	Fires after update. Makes sure that Opportunity Owner change processes are executed after Account Transfer / Mass Account Transfer tool used as in both cases, Opportunity triggers are not fired.

Contact Object

Used Standard Fields

FirstName, LastName, Phone, MobilePhone, Email, Mail Address

Added Custom Fields

Field API Name	Type	Description
TSPC__PhotoUrl__c	Text(255)	Stores custom avatar picture url as an alternative option to Salesforce Socials
TSPC__FacebookUrl__c	URL(255)	Stores link to social profile
TSPC__LinkedInUrl__c	URL(255)	Stores link to social profile
TSPC__PhotoUrl__c	URL(255)	Stores link to social profile
TSPC__TwitterUrl__c	URL(255)	Field to store link to social profile
TSPC__IsUICreated__c	Checkbox	Set true if Contact was created through ClosePlan app UI. This flag allows you to tweak your processes to behave differently if needed.
TSPC__IsMapped__c	Checkbox	Used by Organigram feature
TSPC__HasPower__c	Checkbox	Used by Organigram feature
TSPC__SiblingSortOrder__c	Number(18, 0)	Used by Organigram feature

Opportunity Object

Used Standard Fields

Name, StageName

Added Custom Fields

Field API Name	Type	Description
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TSPC__CPDeal__c	Lookup(TSPC__Deal__c)	Lookup to ClosePlan which is currently deployed to the Opportunity
TSPC__CPDealCount__c	Roll-Up Summary	Number of ClosePlans related to opportunity. Currently 0 or 1.
TSPC__CPLastOppUpdateDate__c	Date/Time	Last Opportunity Update timestamp. Set automatically every time Opportunity gets updated in the background by ClosesPlan based on user actions.
TSPC__CPStageAP_Enabled__c	Formula (Checkbox)	True if Staging enabled for given ClosesPlan template
TSPC__CPStageAP_EventBehavior__c	Formula (Text)	Playbook Events blocking behaviour. Applicable if Staging is enabled.
TSPC__CP_TemplateName__c	Formula (Text)	Deployed Template Name

Triggers

Name	Description
TSPC.Opportunity	Fires before delete. Deletes all related ClosePlan data which would otherwise block opportunity deletion

Opportunity Team Member Object

Used Standard Fields

All Standard Fields

Added Custom Fields

Field API Name	Type	Description
TSPC__EventGroup__c	Lookup(CP Event Group)	Event group associated with this Team Member
TSPC__EnableNotifications__c	Checkbox	Subscribes member to ClosePlan record

Triggers

Name	Description
TSPC.OpportunityTeamMember	Fires after insert/update/delete. Handles permission distribution to ClosePlan objects which are not directly /indirectly in Master-Detail relationship with Opportunity based on Team Member permission levels to Opportunity.

Opportunity Contact Role Object

Used Standard Fields

All Standard Fields

Added Custom Fields

Field API Name	Type	Description
TSPC__CPDealId__c	Formula (Text)	Hold ID of related Opportunity ClosePlan.

Triggers

Name	Description
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TSPC.
OpportunityContactRole

Fires before insert, after insert/update/delete. Handles Opportunity Contact Roles Sync with ClosePlan Stakeholders