



# Flexx.Suite

12.Marketing & Sales

## Lead Conversion Data Mapping

Lead Conversion Data Mapping is used to adjust fields used for clients data base that is used within the CRM

In here you can see a list of available ones

Actions	Field Label	Field Type	Mapping with other Modules		
	Leads	Type	Organizations	Contacts	Opportunities
	Company	String	Organization Name		Opportunity Name
	Industry	Pick List	Industry		
	Primary Phone	Phone	Primary Phone	Office Phone	
	Fax	Phone	Fax	Fax	
	Rating	Pick List	Rating		
	Primary Email	Email	Primary Email	Primary Email	
	Website	Uri	Website		
	City	String	Billing City	Mailing City	
	Postal Code	String	Billing Postal Code		
	Country	String	Billing Country	Mailing Country	
	State	String	Billing State	Mailing State	
	Street	Text Area	Billing Address	Mailing Street	
	PO Box	String	Billing PO Box	Mailing P.O. Box	
	City	String	Shipping City		
	Postal Code	String	Shipping Postal Code		
	Country	String	Shipping Country		
	State	String	Shipping State		
	Street	Text Area	Shipping Address		
	PO Box	String	Shipping PO Box		
	Description	Text Area	Description	Description	Description
	Salutation	String		Salutation	
	First Name	String		First Name	
	Last Name	String		Last Name	
	Mobile Phone	Phone		Mobile Phone	

In Actions category you can use this icon to delete redundant fields

HOME > Marketing & Sales > Leads

Search settings

- USER MANAGEMENT
- MODULE MANAGEMENT
- AUTOMATION
- SYSTEM
- CONFIGURATION
- MARKETING & SALES
  - Lead Conversion Data Mapping
  - Opportunity to Project Mapping
- INVENTORY
- MY PREFERENCES
- INTEGRATION
- EXTENSIONS
- OTHER SETTINGS

Actions	Field Label	Field Type	Mapping with other Modules		
	Leads	Type	Organizations	Contacts	Opportunities
	Company	String	Organization Name		Opportunity Name
	Industry	Pick List	Industry		
	Primary Phone	Phone	Primary Phone	Office Phone	
	Fax	Phone	Fax	Fax	
	Rating	Pick List	Rating		
	Primary Email	Email	Primary Email	Primary Email	
	Website	Url	Website		
	City	String	Billing City	Mailing City	
	Postal Code	String	Billing Postal Code		
	Country	String	Billing Country	Mailing Country	
	State	String	Billing State	Mailing State	
	Street	Text Area	Billing Address	Mailing Street	
	PO Box	String	Billing PO Box	Mailing P.O. Box	
	City	String	Shipping City		
	Postal Code	String	Shipping Postal Code		
	Country	String	Shipping Country		
	State	String	Shipping State		
	Street	Text Area	Shipping Address		
	PO Box	String	Shipping PO Box		
	Description	Text Area	Description	Description	Description
	Salutation	String	Salutation		
	First Name	String	First Name		
	Last Name	String	Last Name		
	Mobile Phone	Phone	Mobile Phone		

Edit

To edit the list press the "Edit" button in the upper right corner

HOME > Marketing & Sales > Leads

Search settings

- USER MANAGEMENT
- MODULE MANAGEMENT
- AUTOMATION
- SYSTEM
- CONFIGURATION
- MARKETING & SALES
  - Lead Conversion Data Mapping
  - Opportunity to Project Mapping
- INVENTORY
- MY PREFERENCES
- INTEGRATION
- EXTENSIONS
- OTHER SETTINGS

Actions	Field Label	Field Type	Mapping with other Modules		
	Leads	Type	Organizations	Contacts	Opportunities
	Company	String	Organization Name		Opportunity Name
	Industry	Pick List	Industry		
	Primary Phone	Phone	Primary Phone	Office Phone	
	Fax	Phone	Fax	Fax	
	Rating	Pick List	Rating		
	Primary Email	Email	Primary Email	Primary Email	
	Website	Url	Website		
	City	String	Billing City	Mailing City	
	Postal Code	String	Billing Postal Code		
	Country	String	Billing Country	Mailing Country	
	State	String	Billing State	Mailing State	
	Street	Text Area	Billing Address	Mailing Street	
	PO Box	String	Billing PO Box	Mailing P.O. Box	
	City	String	Shipping City		
	Postal Code	String	Shipping Postal Code		
	Country	String	Shipping Country		
	State	String	Shipping State		
	Street	Text Area	Shipping Address		
	PO Box	String	Shipping PO Box		
	Description	Text Area	Description	Description	Description
	Salutation	String	Salutation		
	First Name	String	First Name		
	Last Name	String	Last Name		
	Mobile Phone	Phone	Mobile Phone		

Edit

Here you will see the same list but with possibility to change Field label and mapping with other modules


HOME > Marketing & Sales > Leads

Search settings

- USER MANAGEMENT
- MODULE MANAGEMENT
- AUTOMATION
- SYSTEM
- CONFIGURATION
- MARKETING & SALES
  - Lead Conversion Data Mapping
  - Opportunity to Project Mapping
- INVENTORY
- MY PREFERENCES
- INTEGRATION
- EXTENSIONS
- OTHER SETTINGS

Actions	Field Label	Field Type	Mapping with other Modules		
	Leads	Type	Organizations	Contacts	Opportunities
	Company	String	Organization Name	None	Opportunity Name
	Industry	Pick List	Industry	None	None
	Primary Phone	Phone	Primary Phone	Office Phone	None
	Fax	Phone	Fax	Fax	None
	Rating	Pick List	Rating	None	None
	Primary Email	Email	Primary Email	Primary Email	None
	Website	Uri	Website	None	None
	City	String	Billing City	Mailing City	None
	Postal Code	String	Billing Postal Code	None	None
	Country	String	Billing Country	Mailing Country	None
	State	String	Billing State	Mailing State	None
	Street	Text Area	Billing Address	Mailing Street	None
	PO Box	String	Billing PO Box	Mailing P.O. Box	None
	City	String	Shipping City	None	None
	Postal Code	String	Shipping Postal Code	None	None
	Country	String	Shipping Country	None	None

Save Cancel



## Opportunity to Project Mapping

Next page is used to operate with Opportunities mapping


HOME > Marketing & Sales > Opportunities

Search settings

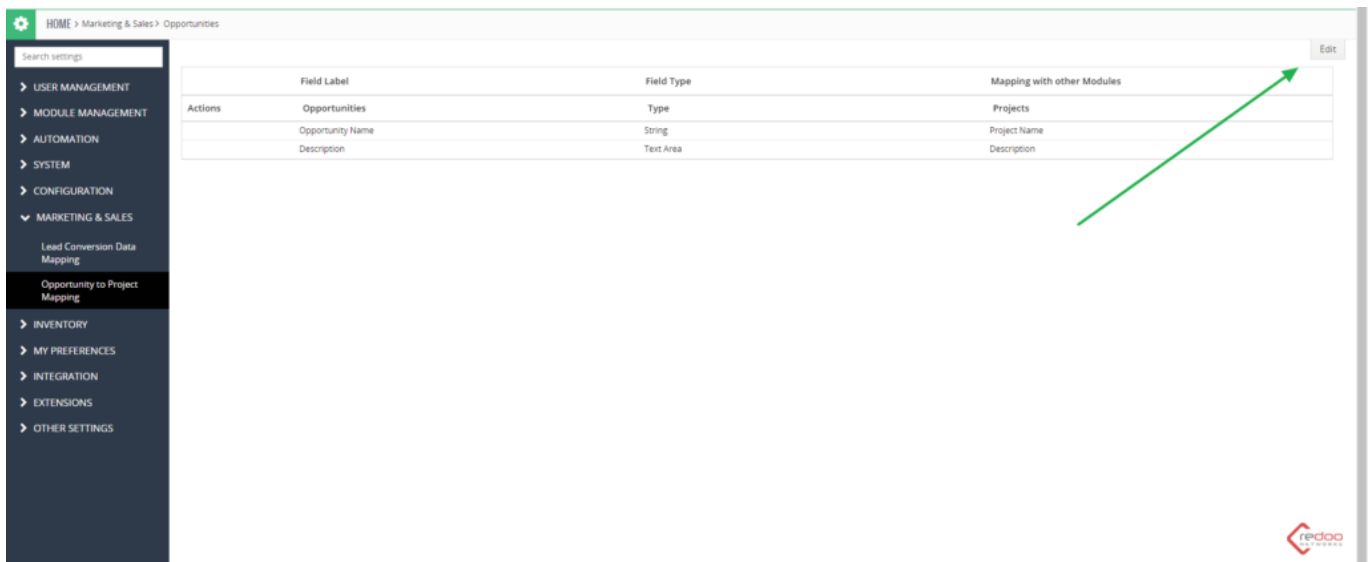
- USER MANAGEMENT
- MODULE MANAGEMENT
- AUTOMATION
- SYSTEM
- CONFIGURATION
- MARKETING & SALES
  - Lead Conversion Data Mapping
  - Opportunity to Project Mapping
- INVENTORY
- MY PREFERENCES
- INTEGRATION
- EXTENSIONS
- OTHER SETTINGS

Field Label	Field Type	Mapping with other Modules
Opportunities	Type	Projects
Opportunity Name	String	Project Name
Description	Text Area	Description

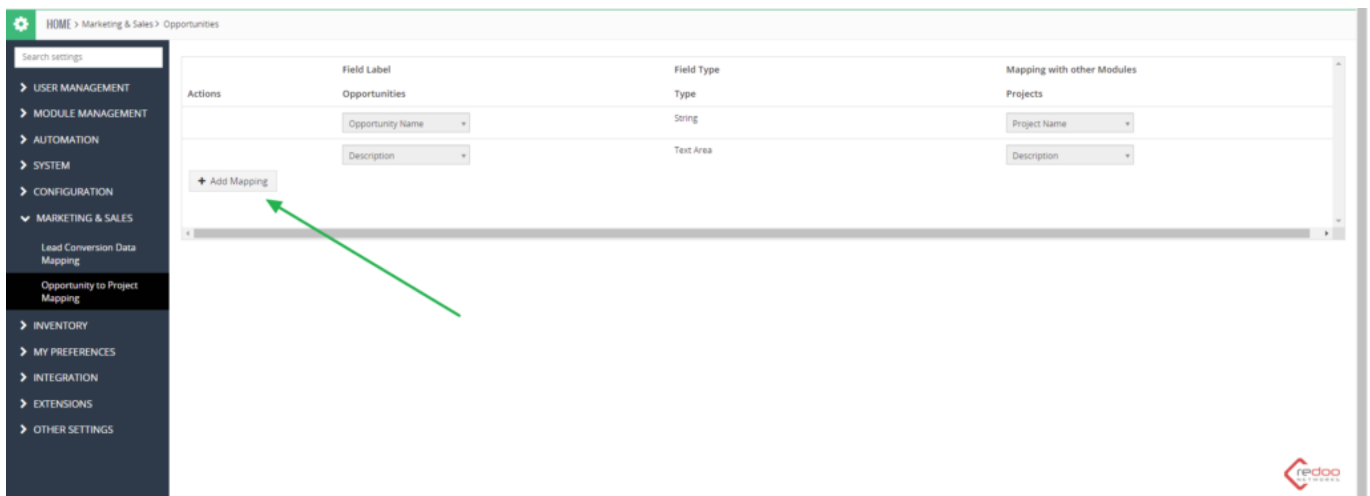
Edit



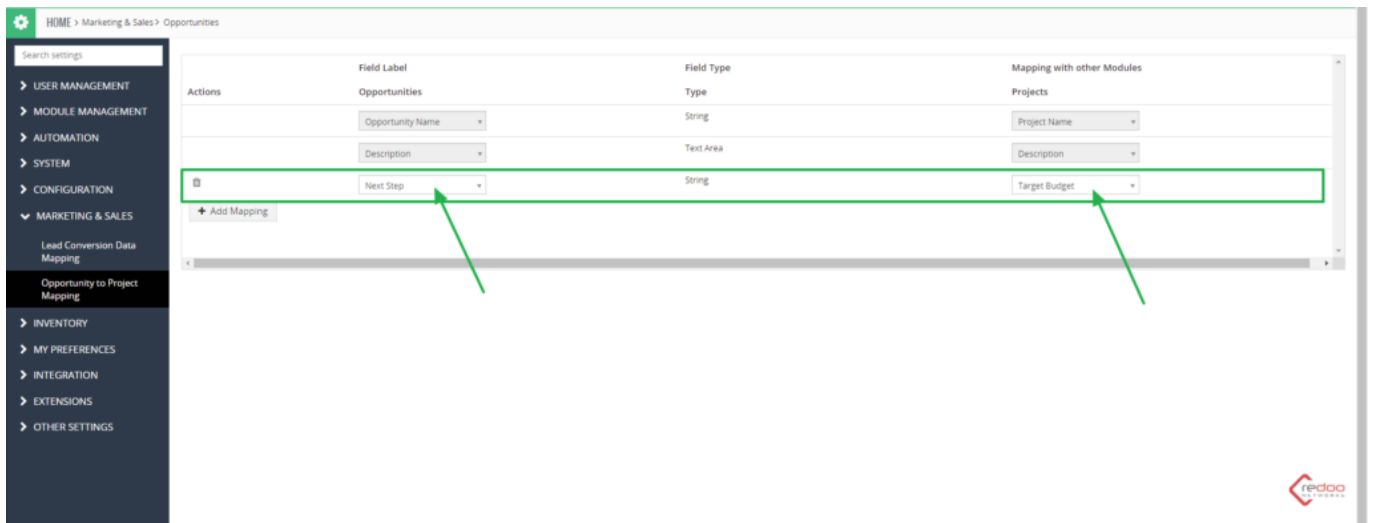
To edit or add a new mapping press the “Edit” button



To add a new opportunity mapping press the “Add Mapping” button like shown in the image



Select the field label and a module to set the mapping with



Field type will be set automatically regarding the Field label

