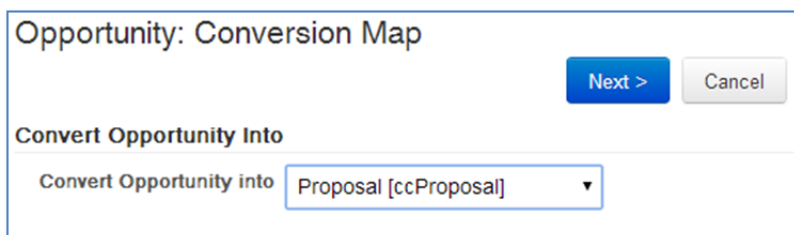


Opportunity Data Map

Creating a Conversion Mapping from Opportunity to Proposal

The last logical step for an Opportunity is to convert it to a proposal. Return to the Opportunity object definition and click on the [Data Maps](#) link. This will take you to the Data Map section of the object where you can create a new mapping by clicking the [New Conversion Map](#) button.

The first step of this process is to select the object that we want to convert into. Select the proposal object and click “Next”.



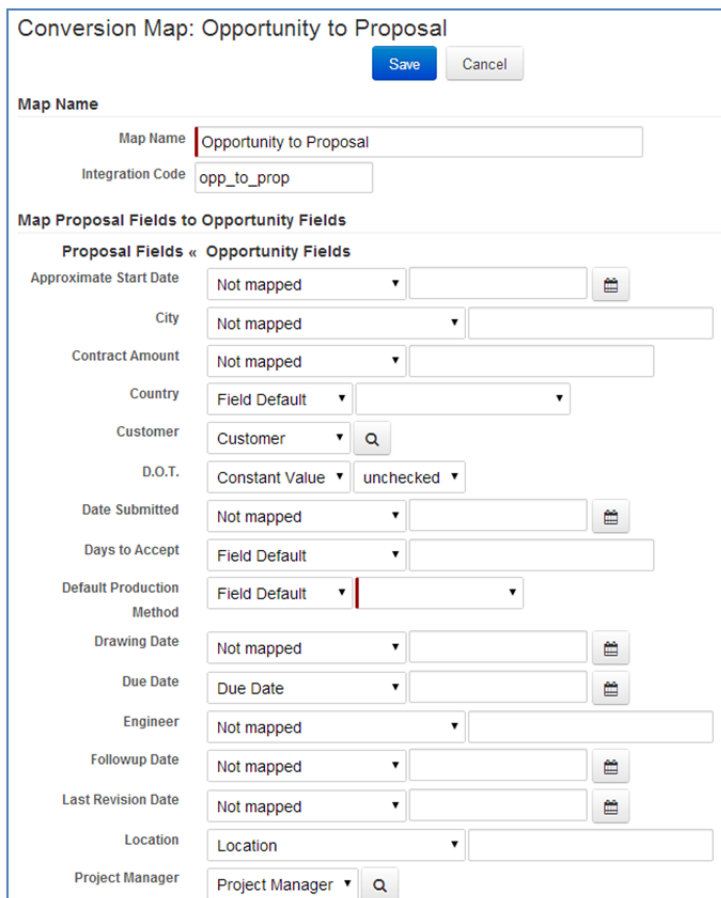
Opportunity: Conversion Map

Next > Cancel

Convert Opportunity Into

Convert Opportunity into Proposal [ccProposal]

You may find that not all Opportunity fields will have a corresponding field in the Proposal object. That’s OK for now, as you can then use the mapping screen as a template to create the rest of the fields in the Proposal object. At this stage, give this mapping a name, integration code, and map as many fields as possible on this screen. Also note, you don’t have to map fields, but can specify default values for fields as well.



Conversion Map: Opportunity to Proposal

Save Cancel

Map Name

Map Name Opportunity to Proposal

Integration Code opp_to_prop

Map Proposal Fields to Opportunity Fields

Proposal Fields	Opportunity Fields
Approximate Start Date	Not mapped
City	Not mapped
Contract Amount	Not mapped
Country	Field Default
Customer	Customer
D.O.T.	Constant Value unchecked
Date Submitted	Not mapped
Days to Accept	Field Default
Default Production Method	Field Default
Drawing Date	Not mapped
Due Date	Due Date
Engineer	Not mapped
Followup Date	Not mapped
Last Revision Date	Not mapped
Location	Location
Project Manager	Project Manager

There are two important mappings to point out. First, we must ensure that there is a one-to-one relationship between opportunity and proposal. That way you will see the following proposal field:

Opportunity

Make sure you specify “Source Object” in that drop down. This creates the relationship. The relationship must be intact, as we will reference it in an onCreate trigger within the proposal to attach the opportunity documents and delete the opportunity.

The other important field is the Job Name. It gets mapped to the Project Name (yes they should probably be the same name). We are going to use this field for the record name template back in the Proposal Object. This ensures that our grids are meaningful with this name.

Project Name

Editing the Proposal Object now lets us specify the following template:

Record Name Template
 Update names of all existing object records using this template

The next step is to review the document on using an Object Script trigger to attach documents to the new proposal.

Clone Matched Related Objects

- Clone Opportunity Documents related to Opportunity and attach them to newly created Proposal
- Clone Customers related to Opportunity and attach them to newly created Proposal

Delete Source Object?

- Delete source Opportunity after conversion

Note: this setting will be ignored if map is used in workflow action or trigger.

The above options will not be used. In my testing, attempting to clone the documents and customers to attach to the new proposal truly do CLONE the documents and customers. This is undesirable. Also note that the Delete Source Object won't work in an action or trigger. That's OK, as we'll use a trigger in the proposal