

## Registration :

after registration, email confirmation needs to occur.

a Subdomain xamarin.funnelbeam.com needs to be created. ( as an example )

Standard login / forget password/ change password pages need to be created.

Name

Email

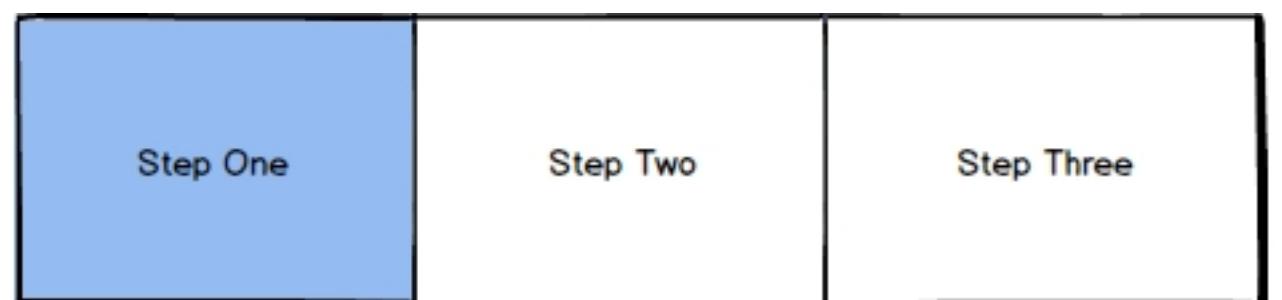
Company

Company domain  .funnelbeam.com

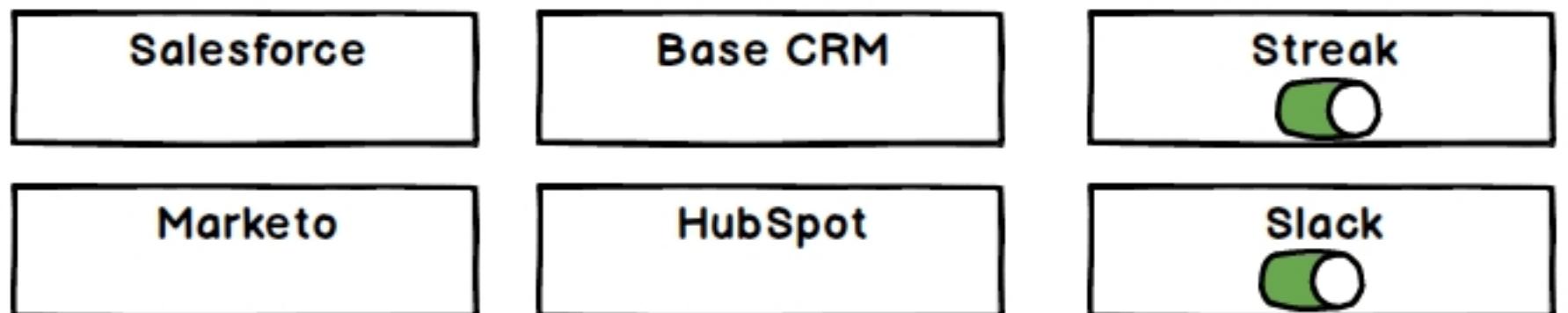
administrator username  @funnelbeam.com

administrator password

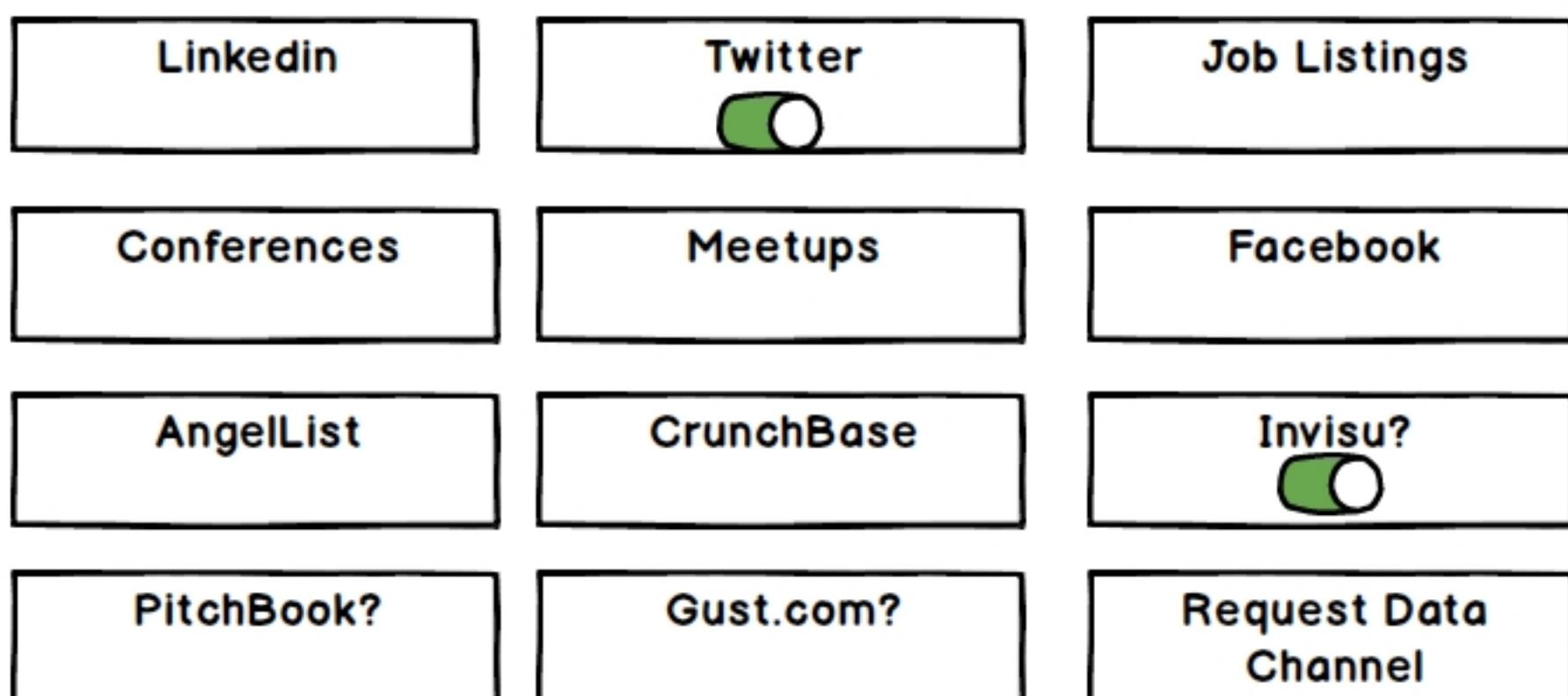
re-enter password



## Integration Channels



## Data Channels



Step 2,  
Go back to Menu after logging in  
Also showing after logged in the menu options to take user back to the first page.  
For user to set up or edit existing integrations  
Each button is like a pop-up form where they enter their credentials to connect to that integration channels. Or they'll go through a set of screens to authenticate those integration channels again.

NEXT >

The user can click on a number of these. Clicking on each one, a basic webform appears where user can enter information (keywords - to search with) and submit. System will then provide information on groups that are to be searched, will add them to the list on that page.. meetups - will add them to the list. twitter channels - will add them to the list that web form page will get updated with a list of channels at the bottom and ability to add additional ones.

- Analytics
- Ongoing Sales Signals
- Personalized Campaigns
- Enriched Accounts & Leads
- Sales Model & Operations

Step One

Step Two

Step Three

## Pick Your Sales Model To Customize

Firmographic

Professional Demographic

Cloud And Data Center

Enterprise Software

SaaS

Mobile

Security

Developer Tech

IT Consulting

Telecommunications

Big Data

Financial Services

Life Sciences/  
Pharma

Retail

Sales / CRM

Hiring

Email Support

Startups / Dealflow

Venture Capital

Fundraising

Real Estate

Journalism / Press

Career Search

Customize

NEXT &gt;

The user can click on a number of models.  
 A help text appears above the models when one hovers - describing what that model contains.

It can even say - what other models are used with this model.

User will most likely click on 2-3 models.

FunnelBeam

Analytics

Ongoing Sales Signals

Personalized Campaigns

Enriched Accounts & Leads

Sales Model & Operations

Models

Fundraising Model

Add a Model >

# FUNDRAISING MODEL

Customize Fields Search

Copy Print PDF CSV

## Feature Choices

## CRM Mapping Account Fields

Company Name	Company
WebSite	Unmapped website site company url
Number Of Employees	

Based on the choice on left, this section gets populated by a scrollable list of choices.

Customer can choose one or more. And we weight score is a slider bar that has 3 for each item.

The final choices appear in the section to the right.

The column to right can also do CRM field custom field creation.

Weights to be decided whether they're on or off.

Customize Fields

**STANDARD**

Company Name	Latest Fund Size
WebSite	Fund Raised Date
Number Of Employees	Recent Investments
Address	Past Investments
Investment Thesis	Categories Invested In
Lead First Name	Major Exits Past 5 Years
E-Mail Address 1	Normally Invests With
	Lead Last Name

**LEAD CHARACTERISTICS**

LEAD ROLES
Lead Titles
Lead Linkedin/FB/Twitter
LEAD JOB DURATION
Lead Interests
LEAD Professional Keywords
Lead Talking About Topics
Lead Blog

**Complementary Investments**

Investment Type
Companies

**Competitive Investments**

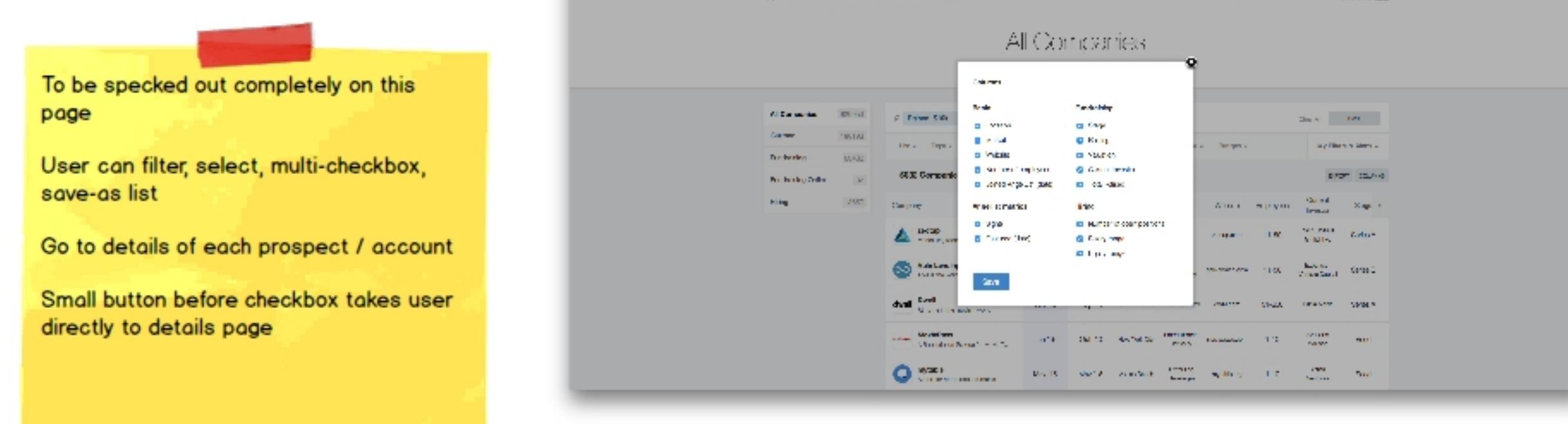
Investment Type
Companies

**BEHAVIORAL CONTEXTS**

Jobs Open In
Conferences Attended
PARTNERING WITH
HAVING INITIATIVES IN
Blog Articles
Investment : Linkedin Groups

E-Mail Address 2
E-Mail Address 2

**Request New Field**



The image shows a user interface for searching and viewing startup companies. At the top, there's a navigation bar with links for TRENDING, RAISING, DONE DEALS, and BROWSE ALL. Below this is a search bar with the placeholder "Search for companies, people, or deals".

The main area is divided into three sections:

- Search Bar (Left):** Includes filters for Location (e.g., Berlin, Austin, San Francisco), Market (e.g., Big Data Analytics, Finance Technology, Entertainment Industry, Food and Beverages), and Stage (e.g., Raised, Raising, Seed). It also has a date range selector (Raised: \$10k - \$100M), a signal range (Signal: 0 - 10), and a valuation range (Valuation: \$10k - \$200M).
- Company Details View (Top Right):** Shows a single company's profile for Formafina, including its logo, name, description, and basic information like Founded: May '14, Joined: Mar '12, Location: Los Angeles, Market: Apparel And Accessories, Website: formafina.com, Employees: 11-50, and Current Investor: 500 Startups.
- Company List View (Bottom Right):** Displays a grid of 328 companies under the heading "All Companies". The columns include Company, Featured, Joined, Location, Market, Website, Employees, Current Investor, and Stage. Some companies listed include Formafina, LeZook, and others.

jea@hf.cx

https://mail.google.com/mail/u/0/?zx=yhv08cew4d8v#pipeline/agxzf1haWxmb29nYWVvLAa8DE8yZ2FuaXphdGvbilFaGYuY3gMCxlIV29ya2Zab3cYgICAgIDdkQoM

App ADP ADP Run HFS Next Fund HR Next Fund Help 21 C HR On-Off Review denver S Jira HR-Hackathon Fund Other Bookmarks

HACKERS & FOUNDERS Mail COMPOSE

Inbox (5) Starred Sent Mail Recently Viewed All Tracked Emails Awaiting Reply Drafts Snoozed Pipelines + New Coop Potential com... CPA/Legal Stuff Fairchild Fund Fundraising GP Investors Fundraising GroupHub Institutional Investors Minor Investors (Su...) Technorides Next Fund More =

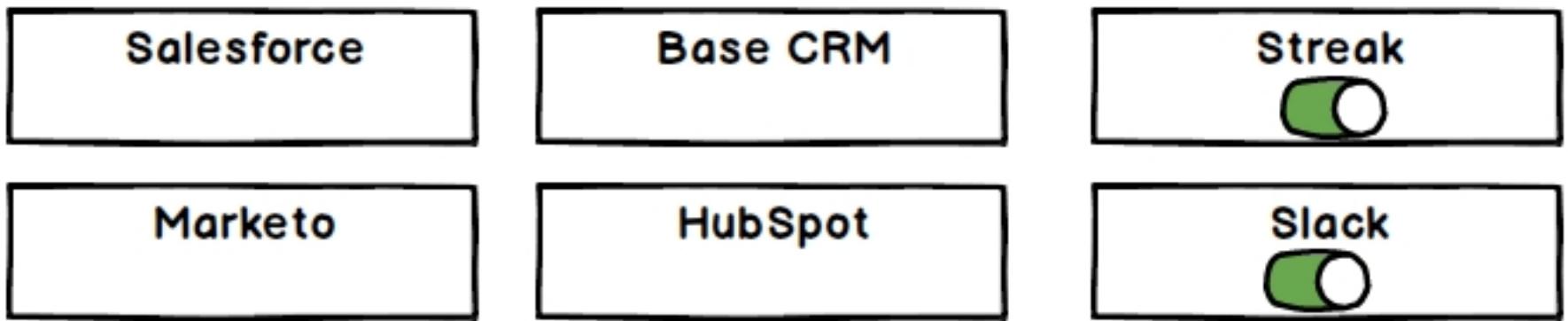
pipeline:Next Fund

Next Fund 1067 Count

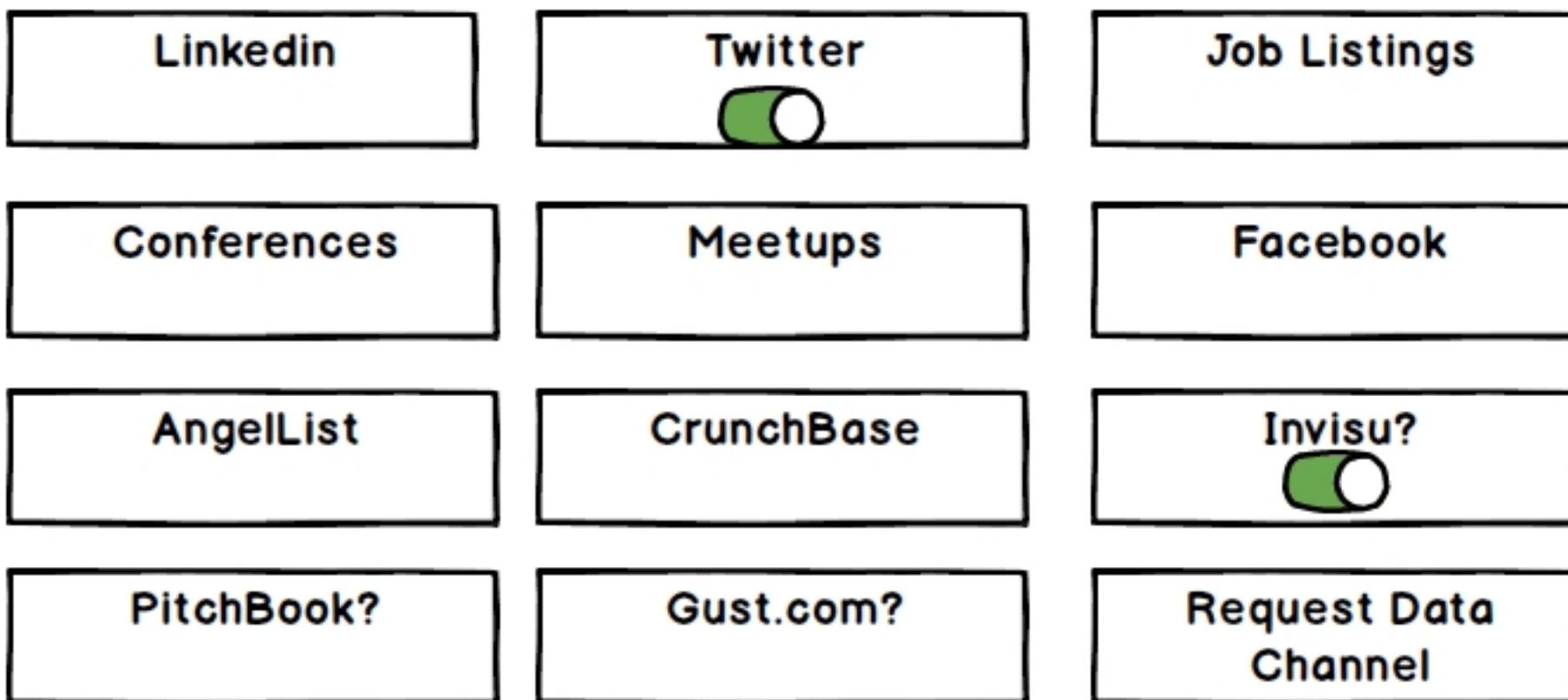
New Leads Leads Recently Imported Lead Pitch 1st Mo Sent Fund Rev For Rev Rev Rev Allo Rev Term Sheet Sent Ser Chk Info to Date Worthless Current Investors Do Not Pitch

Name	First	Email Addresses	email	phone	Stage	Days in Stage	Company	Date of Last Email	Email Thread	Notes	Deal
Dominic Lux	Dominic	team@angel.co, comluxford@gmail.com, jea@hf.			New Leads	6		Sep 10	2		
Andreas Banke	Andreas	andreas@realconnex.com, jea@hf.cx	andreas@realconnex.com		New Leads	6		Sep 10	2		\$5M
Paulius	Paulius	peiliusuz@gmail.com, jea@hf.cx			New Leads	48		Sep 10	2		
Arthur Goldzman sent you	Arthur	team@angel.co, msg-reply-6700ace512d8ea029f4			New Leads	59		Jul 14	1		
Mark	Mark	team@angel.co, mark@birch.co, msg-reply-bb701			New Leads	59		Sep 11	2		
Bobby Brannigan	Bobby	msg-reply-3113cb5194ch00612n326476n49486bdb6			New Leads	59		Jul 13	1		
Walt Duflock	Walt	duflock@yahoo.com, jea@hf.cx	dufflock@yahoo.com	408-595-6407	New Leads	60		Sep 10	1		
Victor Lyuboslavsky	Victor	team@angel.co, msg reply-0302031819e4606d60		612-947-4371	New Leads	61		Jul 12	1	Kind of a jerk	
Iwein	Iwein	angela@startersquad.com, iwein@startersquad.co			New Leads	63		Sep 11	3		
Zufar	Zufar	zkmd@mua.com, jea@hf.cx			New Leads	63		Sep 10	2		
Daniel Laury	Daniel	daniel.laury@gmail.com, jea@hf.cx			New Leads	67		Sep 10	2		
Michael Boules	Michael	team@angel.co, msg reply-c43fb1a7odd18bc03884			New Leads	64		Jun 18	1		
Adrien Gauthier	Adrien	adrien@gauthier.info, jea@hf.cx			New Leads	94		Sep 10	3		
Jeffrey.gor	Jeffrey	jeffrey.gorelick@gmail.com, 1@hf.cx, jea@hf.cx			New Leads	94		Sep 10	2		
Gabor Kutak	Gabor	msg-reply-723cb4240b3d4ed67b8905cccd18b198c			New Leads	94		Jun 08	1		
Brandon Bichler	Brandon	team@angel.co, meller-daemon@googlemail.com			New Leads	107		Sep 10	3		
Aaron Prior	Aaron	nabs@hf.cx, team@angel.co, jn@hf.cx, aaron.pri			New Leads	116		Sep 11	3	Deutsche Bank National T	
Oskari Kettunen	Oskari	team@angel.co, oskari.kettunen@reaktor.com, je			New Leads	116		Sep 10	5	Reaktor Poole	
Scott Schlichter	Scott	scott@gtchannel.com, nabs@hf.cx, jn@hf.cx, jon@			New Leads	119		Sep 10	2		
Samuel Bretzfield	Sam	team@angel.co, sam@globalacuring.com, jea@			New Leads	122		Sep 10	5	Does \$100K per deal	
Rajeev Gude	Rajeev	team@angel.co, msg reply-74e3u8690b4ccb08991			New Leads	128		May 06	1	Startup investor type	
Mark R	Mark	nabs@hf.cx, team@angel.co, mremelkja@gmail.co			New Leads	133		Sep 10	3		

## Integration Channels

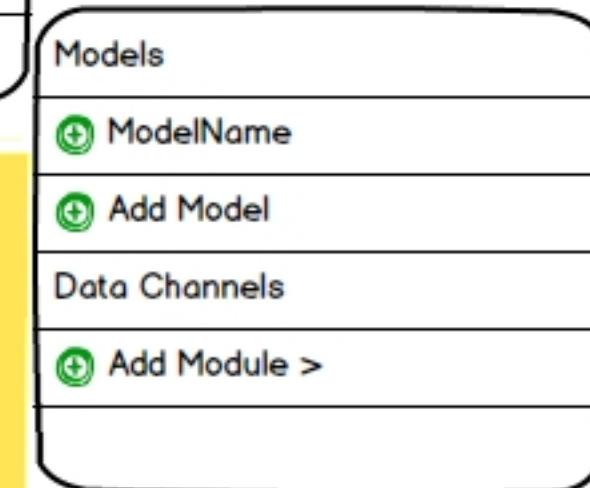
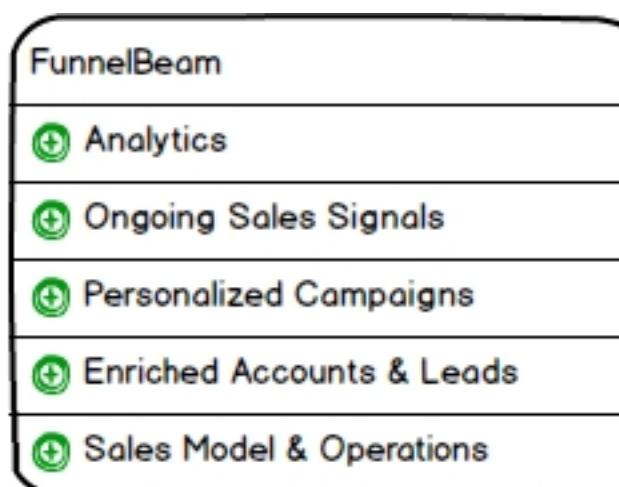


## Data Channels



NEXT >

The user can click on a number of these. Clicking on each one, a basic webform appears where user can enter information (keywords - to search with) and submit. System will then provide information on groups that are to be searched, will add them to the list on that page. meetups - will add them to the list. twitter channels - will add them to the list that web form page will get updated with a list of channels at the bottom and ability to add additional ones.



Step 2,

Go back to Menu after logging in

Also showing after logged in the menu options to take user back to the first page.

For user to set up or edit existing integrations

Each button is like a pop-up form where they enter their credentials to connect to that integration channels. Or they'll go through a set of screens to authenticate those integration channels again.

FunnelBeam

Analytics

Ongoing Sales Signals

Personalized Campaigns

Enriched Accounts & Leads

Sales Model & Operations

Enrichment

All Prospects

Accounts

Leads

Integrate Enrichment Lists

## Integrate Enrichment Lists

Salesforce  
Enrichment

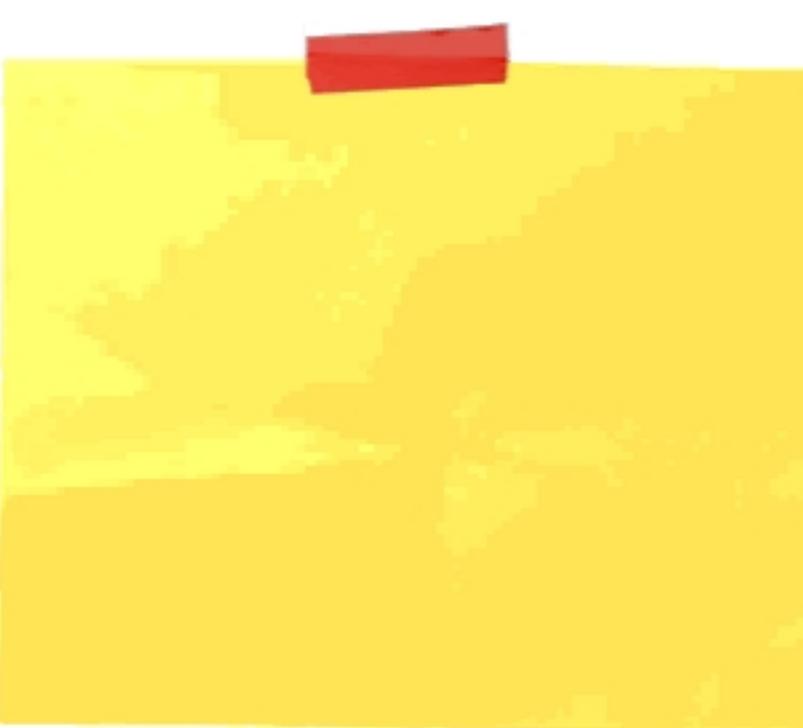
Marketo  
Enrichment

Upload CSV

Developer Tech

Financial Services

NEXT >



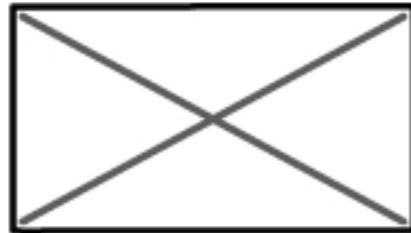
# FunnelBeam

- Analytics
- Ongoing Sales Signals
- Personalized Campaigns
- Enriched Accounts & Leads
- Sales Model & Operations

## Enriched Accounts Leads

- All Accounts
- All Leads
- Single Account >
- Single Lead

Accounts Leads & Contacts Moments Compare



ACME Corp

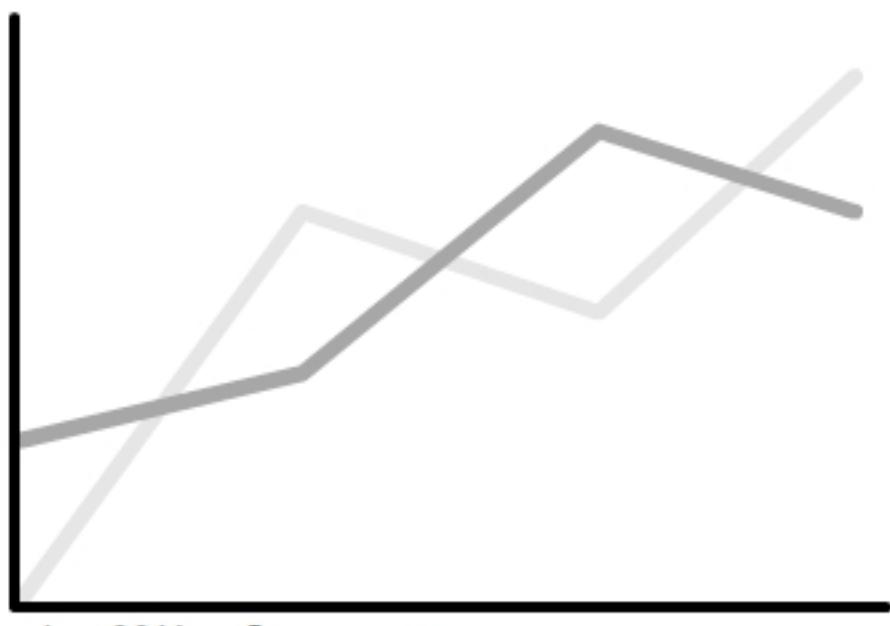
Customer Stage: Prospect

NorthEast United States

Target Account

Media & Entertainment

Category: B2B



Aug 2014    June    Sep

## Top Moments

6/20/2015: 4 Influencers put on personalized outreach - 12 touches so far

6/20/2015: 3 Decision Makers sent personalized Emails: 2 responded.

6/15/2015: 12 Leads acquired from FunnelBeam: 1 responded to email blast.

8/15/2014: Eric Johnson, Web Developer: Contact Call:  
Focus: International Expansion Site Scaling

8/11/2014: Web Developer Eric Johnson, visited 10 site pages, signed up

6/23/2014 UX Designer, Lisa Anne, signed up with personal email

## Recommended Marketing Actions:

Personalized Touches to 6 stakeholders

Campaign: International Expansion

Campaign: Expanding DevOps Team

Campaign: VMWare, HP Server Complementary Use

## Recommended Sales Signals/Actions:

You only have 2 leads. Get More from Funnelbeam

Signal1:

Complementary Products: ACME uses VMWare, HP Servers

Signal2:

Behavioral: ACME send 2 people to OpenStack Summit

Signal3:

Growth: ACME is hiring in 88 positions - with 2 OpenStack Jobs Open

Signal4:

Growth: ACME is growing Internationally

Challenge:

Competitor: ACME uses RedHat , your competitor



**David Williams**  
Art Director ▾

Dashboards

Layouts

Graphs

Mailbox

16/24

Metrics

Widgets

Forms

App Views

SPECIAL

Other Pages

Miscellaneous

NEW

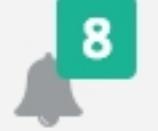
UI Elements

Grid options



Search for something...

Welcome to INSPINIA+ Admin Theme.



Log out



# jqGrid

Home / Tables / jqGrid

## jQuery Grid Plugin – jqGrid

**jqGrid** is an Ajax-enabled JavaScript control that provides solutions for representing and manipulating tabular data on the web. Since the grid is a client-side solution loading data dynamically through Ajax callbacks, it can be integrated with any server-side technology, including PHP, ASP, Java Servlets, JSP, ColdFusion, and Perl. jqGrid uses a jQuery Java Script Library and is written as plugin for that package. For more information on jQuery Grid, please refer to the [jqGrid web site](#).

### Basic example

Grid

Google Sheet

#### EXAMPLE JQGRID 1

Inv No	Date	Client	Amount	Tax	Total	Notes
1	5/24/2010	test	0.00	10.00	2111.00	note
2	5/25/2010	test2	0.00	20.00	320.00	note2
3	9/1/2007	test3	0.00	30.00	430.00	note3
4	10/4/2007	test	0.00	10.00	210.00	note
5	10/5/2007	test2	0.00	20.00	320.00	note2
6	9/6/2007	test3	0.00	30.00	430.00	note3
7	10/4/2007	test	0.00	10.00	210.00	note
8	10/3/2007	test2	300.00	21.00	320.00	note2
9	9/1/2007	test3	400.00	30.00	430.00	note3

◀ ▶ Page 1 of 2 ▷ ▸ 10 ▲

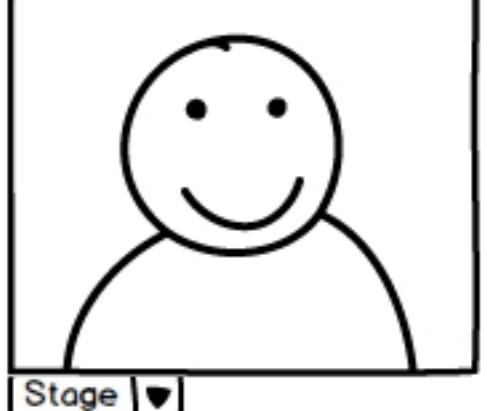
View 1 - 14 of 27

**FunnelBeam**

- Analytics
- Ongoing Sales Signals
- Personalized Campaigns
- Enriched Accounts & Leads
- Sales Model & Operations

ACME Corp

Signals Leads & Contacts Moments Compare



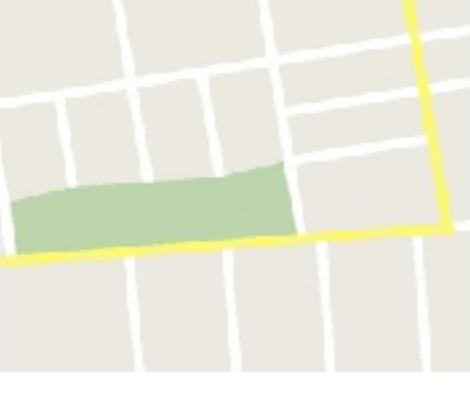
Stage ▾

First Name: George  
Last Name: Segall  
Email: g@segall.vc  
Phone: 444-888-6666  
Company: ACME Corp

Next Action: Mail Scheduled for week of 9/6/2015. Its been 3 months since you interacted with George.  
George has invested in a,b,c since you connected.  
George wrote blog articles on

Title:  
Location:  
Interests:  
Specialties:  
  
Linkedin URL:  
FB URL:  
Twitter URL:  
Angel List URL:  
CrunchBase URL:

Typical Deal Size:\$25K-\$250K  
Fund Size(s): \$80M  
Fund Raised: Sep 2012  
Fund year: 3rd yr  
Number of investments this year: 6  
Number of Total Investments : 29  
Type of investments ( categories invested in ): Big data, Machine Learning, enterprise  
( What they are investing - mostly through angel list - not every profile has it - some steve - ask about activity.



Date Reached: Mar 04 2014  
Date of Last Email: Mar 07 2015  
Email Thread Count: 3  
( The reason for these is to know when the last touch point was. If it was a while ago, First conversation may not be a closing one - but six months later it might be one.. Sh

Freshness: Very Fresh  
( Came from streak - they have an algorithm - when was the last email, email thread This is similar to email reached times.

Summary:  
Date of Last Stage Change: Mar 06 2015 ( Stages are: Leads->Pitched->Term She  
Different stages for fairchild fund vs smaller fund.

Location: Miami, FL ( Location on angel list is weird: It will show current location and t  
Sort by contacts by location is handy on the list page.

The screenshot shows a web application interface for the INSPINIA Admin Theme. The top navigation bar includes a back button, forward button, refresh button, and a search bar with placeholder text 'Search for something...'. On the right of the search bar are notifications (16) and a log out link. The main header displays 'Welcome to INSPINIA+ Admin Theme.' and a user profile picture of David Williams, Art Director.

The left sidebar contains a navigation menu with the following items:

- Dashboard
- Layouts
- Graphs
- Mailbox (16/24)
- Metrics
- Widgets
- Forms
- App Views (SPECIAL)
  - Contacts
  - Profile
  - Profile v.2
  - Contacts v.2
  - Projects
  - Project detail
  - Teams board
  - Social feed
  - Clients
  - Outlook view
  - Vote list
  - File manager

The main content area is titled 'Profile' and shows the profile of 'Alex Smith, Founder of Groupeq'. It includes a profile picture, bio ('There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form Ipsum available.'), and a summary section with metrics:

- 142 Projects
- 22 Followers
- 61 Comments
- 54 Articles
- 154 Tags
- 32 Friends

A line chart titled 'Sales in last 24h' shows sales figures of 206 480 over time. Below the chart, there are two yellow panels: one for 'Meeting' and one for 'Campaign Feed here'. The 'Meeting' panel lists items like 'Show FunnelBeam Data Feed here', 'AngelList update', 'LinkedIn update', 'Blogs', 'Twitter Feed', and 'News'. The 'Campaign Feed here' panel lists items like 'Show Campaign Feed here', 'Emails sent + message', 'Twitter follow notification', 'LinkedIn Add notification', 'Future plans', 'Adding LinkedIn in 8 Days', and 'Following his AngelList in 40 Days'. At the bottom, there is a note about the history of Lorem Ipsum.

The image shows a screenshot of the Slack application interface. On the left, there's a sidebar with a dark theme containing a list of channels and users. The channels include 'H/F Team', '#newsfeed' (which is highlighted with an orange border), '#general', '#ht-feed', and '#scrum'. Below these are several pinned channels like '#dev', '#global', and '#social-blast'. A user named Torrance Carroll is listed at the bottom. On the right, there are three main windows representing different Slack channels:

- #newsfeed**: Shows 60+ new messages since 9:35 PM on September 9th. It includes posts from 'Hackers / Founders Official Twitter' (@WrhlPwr) about a Wearables IoT Summit, 'Stardates' (@Stardates) with a message about Stardate -27, 'Google Calendar' (@GoogleCalendar) with an event starting now, 'Sunrise and sunset for San Jose' (@SunriseSunset), and 'MAC Cannon' (@MacRumors) with a link to an article about Apple's Magic Keyboard.
- H/F Co-op**: A modal window titled 'Example Campaign & FunnelBeam newsfeeds' is displayed over the #newsfeed channel. It lists members of the channel: Torrance, Alexa Clark, Mak Gut, Nabilah P., Sudarshan, Aronovic I., Chris Beck, Craig Morris, Jock Siegel, Jonathan Nelson, Jonathan Angel, Laura Nelson, Sondra Mocino, Steve Deeks, and Tim Bortas. The modal also contains tabs for 'Visuality', 'Video-marketing', and 'Social-blast', with 'Social-blast' currently selected.
- #newsfeed**: Shows 44 new messages since 9:35 PM on September 9th. It includes posts from 'CameraLends' (@Camera\_Lends) about a filter set, 'BrowsingLing' (@BrowsingLing) with a message about Buffer, 'Synapse' (@Synapse), and 'Zerply' (@Zerply) with a link to a blog post by environment artist Debby Memphel.

On the far right, there's a 'Channel Info' sidebar with sections for 'About This Channel', '1 Pinned Item' (with a message from James Rogers), and '2/4 Members' (listing Sondra Mocino, Torrance Carroll, James Rogers, and Sondra Mocino again).

FunnelBeam

- Analytics
- Ongoing Sales Signals
- Personalized Campaigns
- Enriched Accounts & Leads
- Sales Model & Operations

Feed Campaigns Templates Personalization Rules

## Personalization Rules

https://persistiq.com/  
howitworks  
TBD

Messaging Type	Rule	Values	Display Message
Competitive Products Found	Matches	Windows, VMWare	Competitor Alert: %Names%, Use Talking Points %Link%
Growth: Hiring	Matches	Big Data, Data Scientist	Noticed you are growing your team by hiring: %Names%, D

 Analytics Ongoing Sales Signals Personalized Campaigns Enriched Accounts & Leads Sales Model & Operations

Feed

Campaigns

Templates

Personalization Rules

[https://persistiq.com/  
howitworks](https://persistiq.com/howitworks)

TBD

# Campaigns

Decision Maker Campaign

Influencer Campaign

UX Designer Campaign



Touch 1 - Common Connection Based ▾

Wait  Days

Touch 2 - LinkedIn Invite ▾

Wait  Days

Touch 3 - Account Initiative Based ▾

Wait  Days

Touch 4 - Twitter Follow ▾

Wait  Days

Touch 4 - Account Signal Based ▾

Wait  Days

Touch 5 - Account Signal Based ▾

## Summary

7487  
Leads Enriched

17659  
Accounts Enriched

68492  
Contacts Enriched

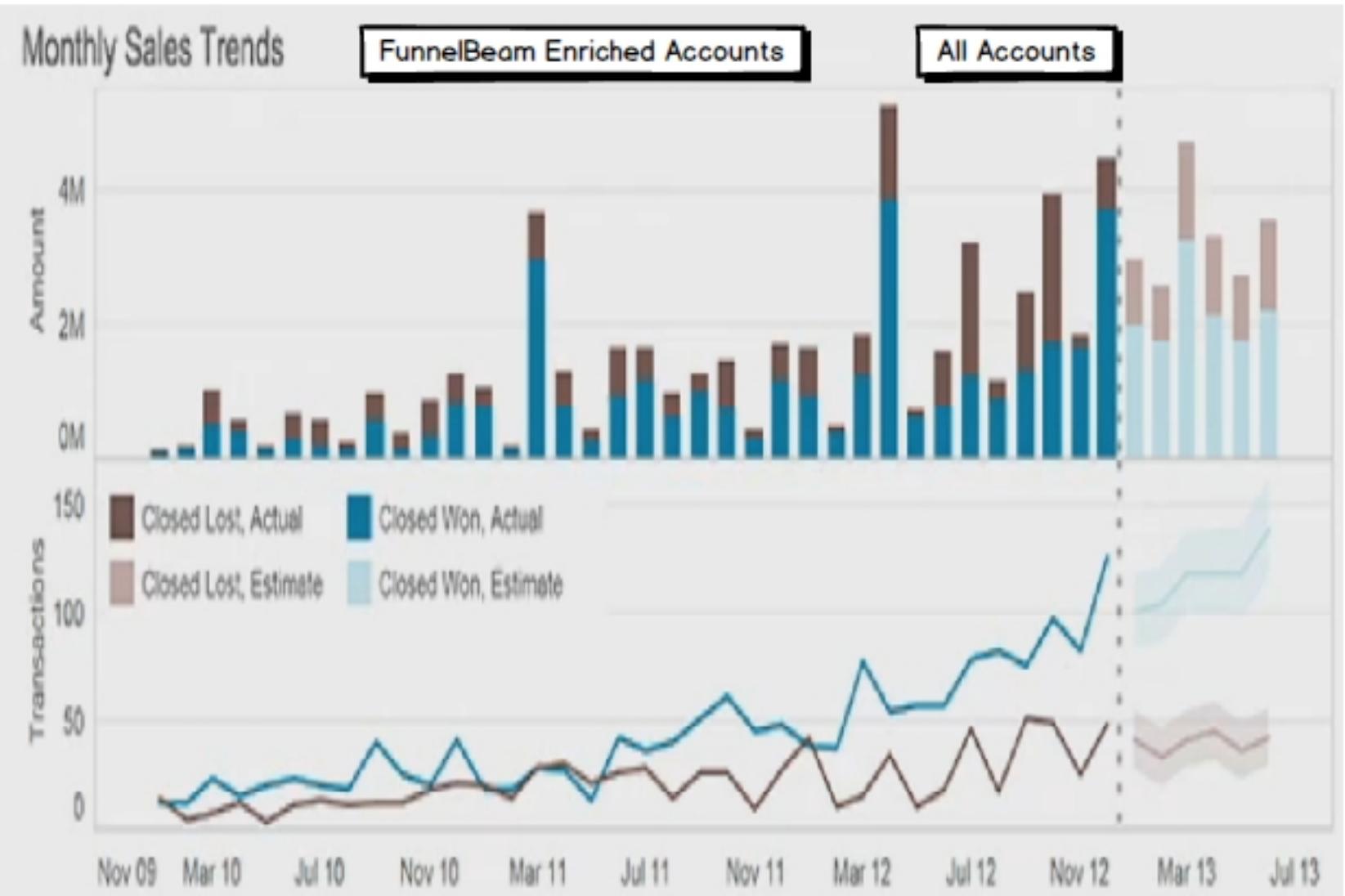
4479  
Net New Leads  
Delivered

9424  
Account Signals  
Delivered

7865  
Contact Signals  
Delivered

Accounts Leads Contacts

### Accounts By Sales



### Accounts by Geography



### Tech Used Distribution





Analytics



Ongoing Sales Signals



Personalized Campaigns



Enriched Accounts &amp; Leads



Sales Model &amp; Operations

## SECURITY MODEL

Firmographic Data

Industries

Number Of Employees

Address

Revenue

Custom Firmographic

BUSINESS TYPE

Types Of Employees

Sells Internationally

Public vs Private

Funding

Company Specialties (Keywords)

### Complementary Products

Vendors

Products

### Competitive Products

Vendors

Products

### BEHAVIORAL CONTEXTS

Security Jobs Open In

Security Conferences Attended

PARTNERING WITH

HAVING INITIATIVES IN

Security Related News

Security : Linkedin Groups

Security: Meetups

### LEAD CHARACTERISTICS

LEAD ROLES

Lead Titles

LEAD Professional Keywords

LEAD JOB DURATION

Lead Interests

Item One	Weight Score 1-5
Item Two	Weight Score 1-5
Item Three	Weight Score 1-5

Based on the choice on left, this section gets populated by a scrollable list of choices.

Customer can choose one or more. And weight the choice.

The weight score is a slider bar that has 3 ticks ( 1-3 ) for each item

The final choices appear in the section to the right.

FunnelBeam
Analytics
Ongoing Sales Signals
Personalized Campaigns
Enriched Accounts & Leads
Sales Model & Operations

FUNDRAISING MODEL

Table View

Google Sheet View

Name title	No.Of Employees	Nickname	Employee
Giacomo Guilizzoni Founder & CEO	37	Peldi	<input type="radio"/>
Marco Botton Tuttofare	34		<input checked="" type="checkbox"/>
Mariah MacLachlan Better Half	37	Patata	<input type="checkbox"/>
Valerie Liberty Head Chef	:)	Val	<input checked="" type="checkbox"/>
Guido Jack Guilizzoni	6	The Guids	<input type="checkbox"/>

Address

Custom Firmographic

Investment Thesis

Latest Fund Size

Fund Raised Date

Recent Investments

Past Investments

Categories Invested In

Major Exits Past 5 Years

Normally Invests With

Complementary Investments

Investment Type

Companies

Competitive Investments

Investment Type

Companies

BEHAVIORAL CONTEXTS

Jobs Open In

Conferences Attended

PARTNERING WITH

HAVING INITIATIVES IN

Blog Articles

Investment : LinkedIn Groups

This is rotated to show a grid.  
It can be filtered.

Take a look at  
<http://mleibman.github.io/SlickGrid/examples/example1-simple.html>

New Prospects on top ( Ranking?)

Alerts on existing prospects/funds

LEAD CHARACTERISTICS

LEAD ROLES

Lead Titles

Lead LinkedIn/FB/  
Twitter

LEAD JOB  
DURATION

Lead Interests

LEAD Professional  
Keywords

Lead Talking About  
Topics

Lead Blog



Dave Bartlett  
GM

92

1 of 1298

Role: Decision Maker      Location: Austin, TX  
Prospect: Existing      Last Touched: 2 Months Ago

### ○ International Expansion

\$ \$ \$

Existing Prospect:

Expecting launch of Games in LATAM and Japan.  
Send [Cloud for International Expansion Message](#) - Target: Decision Maker

### ○ Hiring In Data Science :

\$ \$

March 2015: Hiring [Big Data Scientist](#)  
[Position Cloud Technology for Data Science.](#)

### ○ Open Stack Interest :

\$ \$

CRM Learning+  
External Data Mining

Send Employees to OpenStack Summit  
[Position OpenStack Offering on Cloud Message](#)



### Competitive Product Alert:

Uses Windows Servers and Office 365.  
Reference [Competitive Script](#)

Suggested Campaigns:

International Expansion

Data Center Consolidation

Exec Events for Gaming Industry

Data Science In Cloud



John Burns

VP Publishing and Business Services

88

3 of 1298

Role: Decision Maker, Influencer

Location: California

Prospect: New

Responsibilities : Growth of NCSoft in US West and International

\$ \$



### International Expansion:

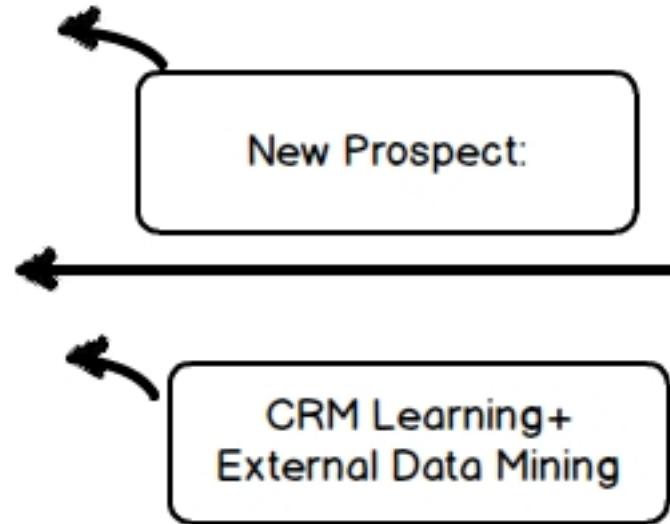
Expecting launch of Games in LATAM and Japan.  
Send [Cloud for International Expansion Message](#)

\$ \$



### On Demand Scale

Expecting launch of Games in LATAM and Japan.  
Send [Cloud for OnDemand Scale Message](#)



Suggested Campaigns:

International Expansion

On Demand Scalability in Cloud

Exec Events for Gaming Industry

Ongoing Enrichment:

- Field Mapping
- Scoring

Bulk Enrichment:

- Upload Records
- Field Mapping**
- CRM Re-Enrich
- Scoring

**Standard Fields**

REVENUE

INDUSTRY

**FunnelBeam Fields**

BUSINESS TYPE

Types Of Employees

INTERNATIONAL PRESENCE

Funding

**Complementary Prod**

SaaS Products

Cloud/Data Center

.....

**Complementary Products**

SaaS Products

SaaS Products

**TYPES OF EMPLOYEE****BEHAVIORAL CONTE**

HIRING IN

ATTENDING

Company Specialties  
(Keywords)PARTNERING  
WITHHAVING  
INITIATIVES IN**LEAD CHARACTERIS**

LEAD ROLES

Lead Titles

LEAD Professional  
SpecialtiesLEAD JOB  
DURATIONLead Talking About  
(Twitter)**SalesForce Lead Field Values****Current Mapping**

Based on the choice on left, this section gets populated by

- Existing CRM Fields. User picks one.
- Existing CRM Field that has a picklist. In this case the middle UI changes to two columns. One with List of FunnelBeam Industry values ( suggest 145 ) and one with list of customer CRM Industry values.( usually 20 or so ) Customer will drag and drop each industry of theirs against one of our ours.
- For certain custom fields - a CRM Field of field1.... field60 wil be used. It will be hard coded and they cant change it.

Final value mappings will be shown here.  
Clicking on one of the mapping, they can re-map it if allowed.  
For mappings not allowed, they will be visible but greyed out.