GatorLeads Setup for CRM

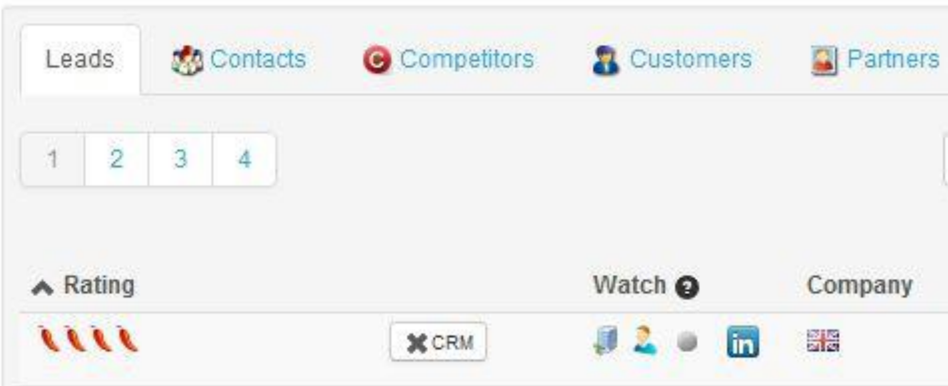
Salesforce

Background

Your GATORLEADS account can be activated to integrate with your Salesforce CRM Account. The purpose of the integration is twofold. 1) Net new name organisations visiting your web site and expressing sufficient interest can automatically be added to CRM as a new Lead. 2) Existing Prospects and Customers visiting your web site can be linked with your existing CRM account records, and where know contacts at Prospects or Customers are seen on the web site the contacts are kept up to date with the Lead score and last visit dates so CRM users are aware of recent web site activity. Where a nurture or re-marketing process is created within GATORLEADS the campaign history of CRM is updated and any opens and clicks are added to the CRM tabs.

GATORLEADS role is to provide valuable insight to web visitor behaviour, where the companies are already known to you its role is to make CRM aware of such activity and thus fulfilling CRM's objective of the single customer view

Through the integration component a CRM button is added next to each company as in the diagram below. This will allow you to create a new lead within CRM and have data about subsequent visits updated overnight.



This button goes to your crm account to find if the company already exists as one of your CRM accounts. This is done through the standard CRM API.

The button has 3 states dependant on the actions you take for each company lead.

This company has NOT been checked against CRM.

This company has been Created as a new LEAD in CRM.

This company has been associated against a CRM account record and will remain in sync with it.

The CRM lead will be created with the Company name, a lead source value of ‘GatorLeads Analytics’ and a permalink will be added. The perma link is a url that when clicked will bring up a browser window of the Company’s full details in GATORLEADS so a CRM user can see the historical clicks of the company from the CRM record.

In addition to this and as part of the setup process, three extra fields will be added to your CRM:

GATORLEADS Field Name	Field Description	CRM Field Type
WOW_LeadPL	Lead Permalink (takes you to the Lead page of WOW).	Clickable hyperlink field
WOW_LeadTS	Lead Total Score.	Number
WOW_LastVisit	Date and Time of last visit to website.	Date & Time

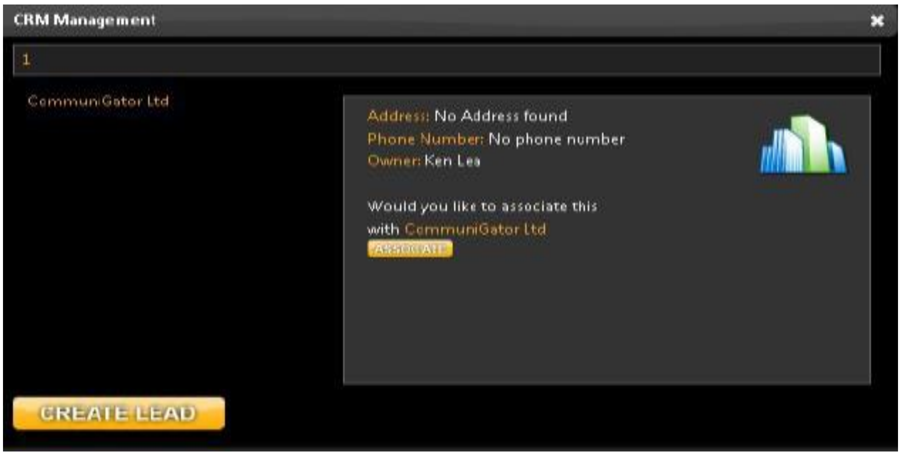
CommuniGator has packages that can install these fields, although you may choose

Create your own, these are native CRM fields populated with data from GATORLEADS through the API integration. As native CRM data they can be used as values to build groups and/or reports, shown in dashboards or additions and changes in these values can be used to trigger workflow and fulfil sales process.

If the GATORLEADS company visit does match to one or many existing CRM accounts (the matching uses a like/fuzzy match so any similar accounts will come back), then you will see address phone and owner details and have the ability to either:

a. Associate this company lead in GATORLEADS to a CRM account – no further action is taken except the CRM button changes to let any users know this account has already been matched. You will be able to choose if many company matches available on which to associate.

b. Create yourself a new lead as the companies match is not correct.



Further actions carried out on the website and stored in GATORLEADS are then returned to your CRM overnight, updating the score and last visit date.

Installation & Setup

The installation and setup of GATORLEADS – CRM integration is made of a number of field additions in CRM and some configuration items within the GATORLEADS application in order to be able to access CRM.

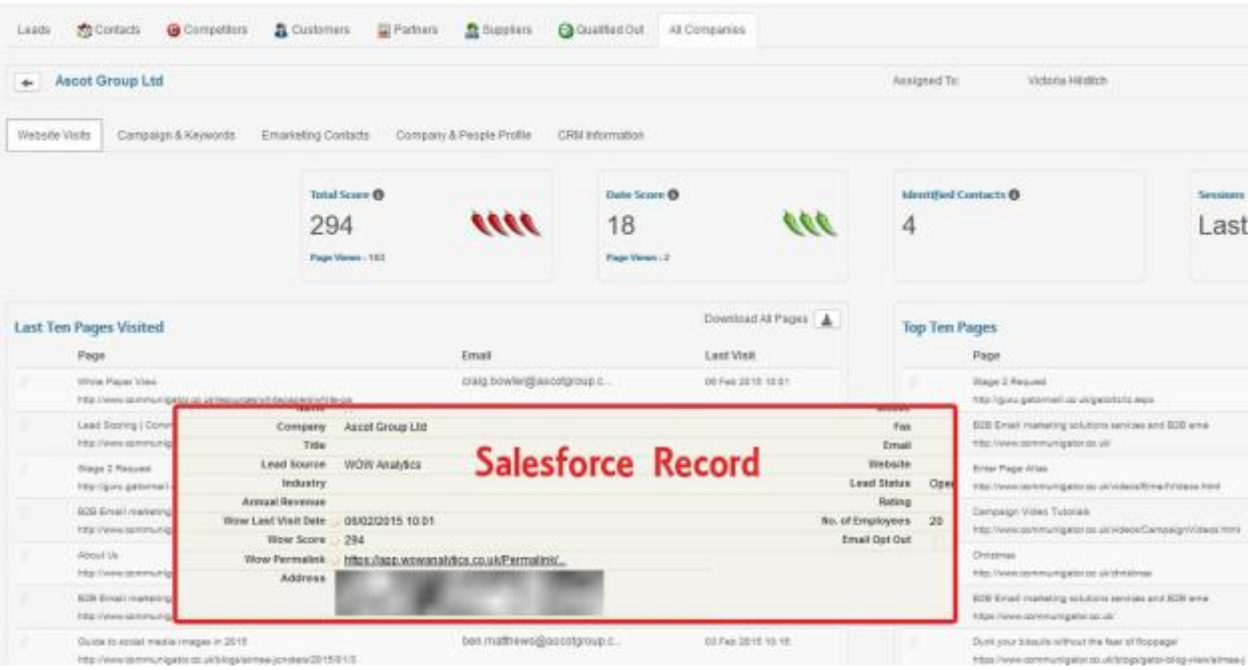
Salesforce Customisations

An installable package will be uploaded into Salesforce that contains 3 new fields to be held against the lead, contact and account entities.

Following the installation by your CRM Administrator they will need to place these fields on the Account and Lead Forms in an area of your choice so that they will be visible to users.

You may also decide to create these fields manually yourself.

(Image below shows GatorLeads and the corresponding record within a Salesforce setup)



GatorLeads Configuration

Within GatorLeads go to Admin – Integration Admin - CRM Select

your CRM system from the drop down list.

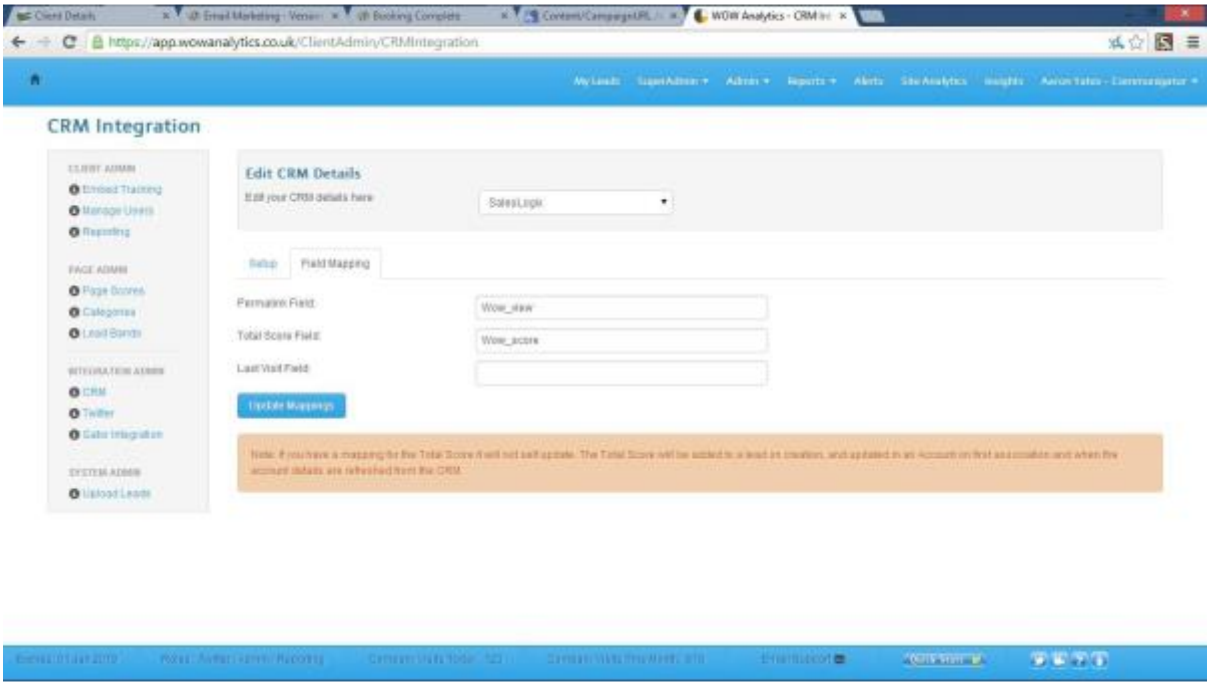
Enter your CRM login details and security token.

Save the details.

WARNING: Please speak to your CRM Administrator before changing your security token within Salesforce, as this may disconnect other third party apps from Salesforce that may use the same login details.

Once saved, the 'Field Mapping' tab will appear, as below. In here, please type the name of the field as it is in Salesforce for each entry. If using the supplied package for Salesforce the field names are:

- comm Wow_Permalink c
- comm Wow_Score c
- comm Wow_Last_Visit_Date c



Should you have any concerns or questions please contact your GatorLeads Representative who will be happy to help.