

HTTP and Marketo Lead Delivery Setup Guide

1 - Starting the HTTP Post setup wizard

- To create a **new template**, hit the New Template button on the top left.
- To modify an existing template, click on the template name in the HTTP Post setup wizard.

MANAGE TEMPLATE

E-Mail HTTP Marketo onDemand Leads

+ New Template

Change Status Apply

| Status | Template Name | Type | Campaign | Create Date | Modified Date | Created By | ID | Copy | XSLT |
|--------------------------|----------------|----------|----------------|-------------|---------------|------------|------|------|------|
| <input type="checkbox"/> | Test HTTP Post | Campaign | (9207) asdfadf | 12/4/2013 | 12/11/2013 | Billy Lin | 2803 | Copy | View |

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2 - Setting up the HTTP Post Template

Settings* Customize Template Test Area

Manage Template Save your changes Save Settings

TEMPLATE NAME:
Test HTTP Post

TYPE:
 Campaign Account
(9207) asdfadf

POST URL:
http://www.madisonlogic.com/scriptname.extension

HTTP METHOD:
 POST GET

- Name your template
- Choose the type of HTTP Post, **Campaign** or **Account** level
 - o Campaign – Posts leads to CRM by campaign, drop down available to select the campaign
 - o Account – Posts leads to CRM by account
 - o **NOTE** – Once you save the template, you cannot change the template type. You will have to duplicate the template to change it. (Please see copying templates)
- Enter your post URL (Usually provided by the client or advertiser)
- Select method, **Post** or **Get**
 - o **Post** – Sending leads to a CRM platform through the POST Url.

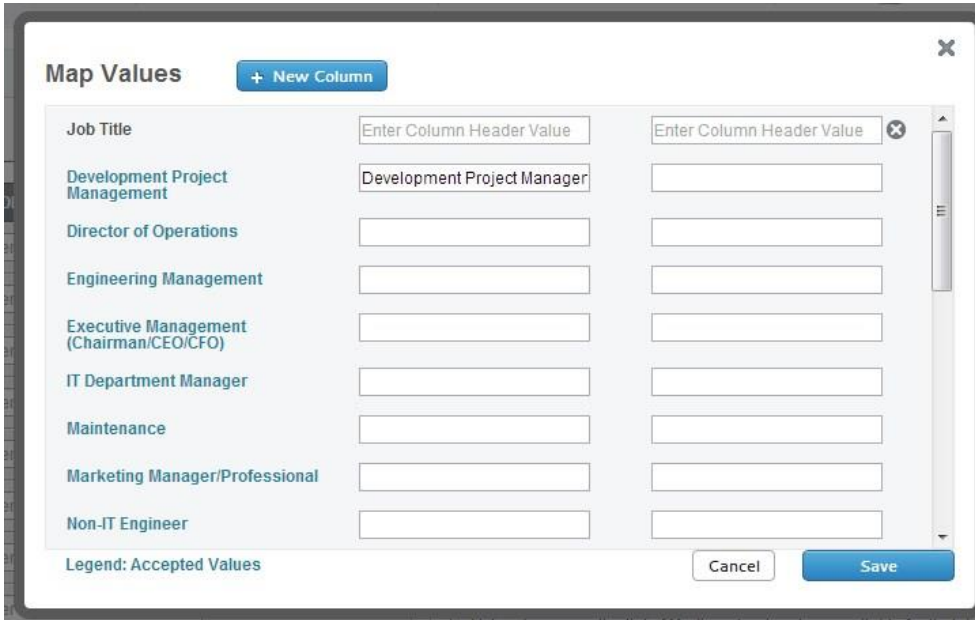
3- Customize Your File Column Header

Settings
Customize Template
Test Area

Add Static Field
Save

| | VALUES | YOUR COLUMN HEADER |
|-------------------------------------|-----------------|---|
| <input type="checkbox"/> | Country | Enter Column Header Value Map Values |
| <input type="checkbox"/> | Company Size | Enter Column Header Value Map Values |
| <input type="checkbox"/> | Job Title | Enter Column Header Value Map Values |
| <input type="checkbox"/> | Industry | Enter Column Header Value Map Values |
| <input checked="" type="checkbox"/> | Work Email | Enter Column Header Value |
| <input type="checkbox"/> | First Name | Enter Column Header Value |
| <input type="checkbox"/> | Last Name | Enter Column Header Value |
| <input type="checkbox"/> | Company Name | Enter Column Header Value |
| <input type="checkbox"/> | City | Enter Column Header Value |
| <input type="checkbox"/> | Zip/Postal Code | Enter Column Header Value |
| <input type="checkbox"/> | Phone | Enter Column Header Value |
| <input type="checkbox"/> | State/Region | Enter Column Header Value |
| <input type="checkbox"/> | publisher | Enter Column Header Value |
| <input type="checkbox"/> | dm_link | Enter Column Header Value |
| <input type="checkbox"/> | campaign | Enter Column Header Value |
| <input type="checkbox"/> | asset | Enter Column Header Value Map Values |

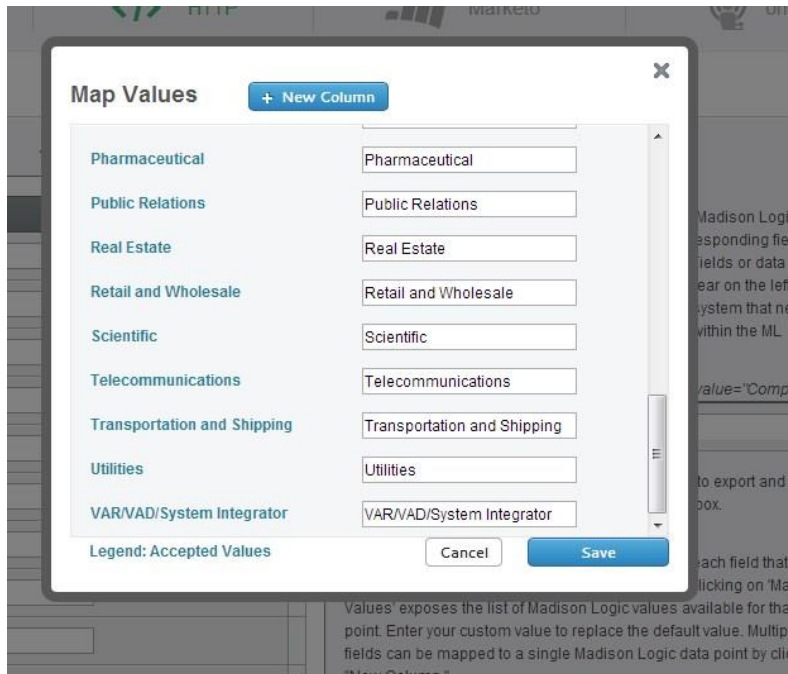
- You will see a list of Madison Logic field names on the left column based on your current campaign details.
- Enter the Excel/CSV column header value in the box on the right that correspond to each field.



4 – Mapping Demographic Values

The Map Values button can be found to the right of each field that is not an Open-ended text field and contains multiple response values.

Clicking on 'Map Values' exposes the list of only Accepted Madison Logic values available for that field.



- Enter your custom value to replace the default value.
- **Mapping Multiple Values**
 - Multiple values can be mapped to a single Madison Logic data point by clicking **New Column**.

5 – Map Campaign Information Fields

- You may want to map other information to each lead such as when the lead was generated, what asset (content) the lead downloaded, Cost of the lead, etc.
- On the Customize Template tab, scroll down below the Form Field values.
 - o **Lead Date** - The date the lead was generated
 - o **Lead ID** - Each lead is assigned a unique Madison Logic ID
 - o **Campaign** - This is the Campaign Name that has been assigned in your account
 - o **CPL** - Cost Per Lead
 - o **Publisher** - This is the source of the lead
 - o **Asset Type** - The white paper, case study, software download that the lead downloaded. Or, the free trial or event that the lead registered for.

6 - Map Your Assets (White Papers, Case Study, Software Downloads, Webinars and Free Trials)

- Your lead file will contain the asset that the user downloaded/registered for.
- You may assign special IDs to each asset that may correspond to a field in your CRM or a campaign promotion from your marketing department.

Map Values + New Column

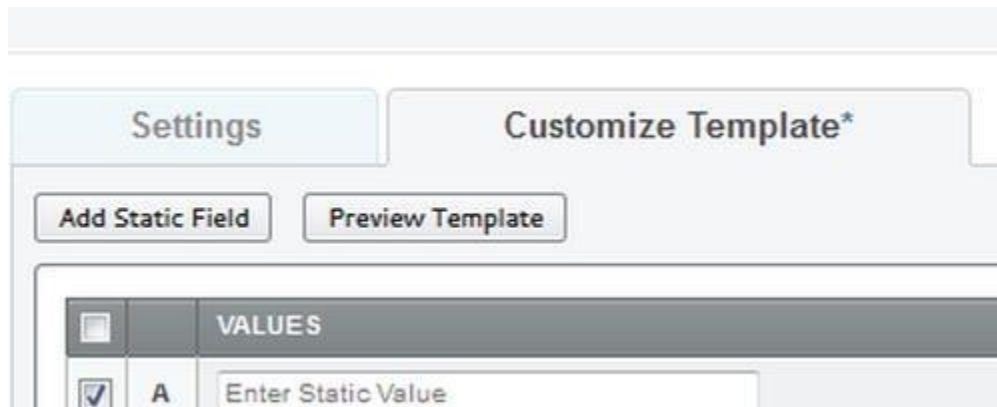
| | |
|---|-------------------------------|
| asset | Enter Column Header Value |
| (6025) Phone Systems Comparison Chart | Phone Systems Comparison |
| (6026) Business VoIP Buyers Guide | Business VoIP Buyers Guide |
| (6286) Hosted VoIP vs VoIP PBX: And the winner is. | Hosted VoIP vs VoIP PBX: And |
| (6287) PBX Buyer's Guide: PBX the choice for Mid to Large Business | PBX Buyer's Guide: PBX the cl |
| (7364) Top 10 Concerns of Buying a VoIP Business Phone System | Top 10 Concerns of Buying a \ |
| (8814) Buying a Business Phone System? See our Top 10 Must Have Business Phone Features Guide | Buying a Business Phone Sys |
| (9099) draft | draft |

Legend: Accepted Values

Cancel Save

7 – Add Static Value for Lead Fields

- For some companies, a lead coming from Madison Logic will have one or more tracking values that is appended to each lead we deliver. This value will be static and is used with your CRM system to attribute source or a score to Madison Logic leads.
- Click on **Add Static Field** at the top left corner of the Customize Template tab. You may add as many static values as you need.



- Example usage - For each Madison Logic lead, you would like to append a "XYZ Company Campaign Name" value. And that value would be "Cloud Computing Q4 2013". You would enter "XYZ Company Campaign Name" in the "Your Column Header" field and "Cloud Computing Q4 2013" in the "Values" field.

8 – Testing Your Post

- **Before you start:**
 - o Make sure that all checkboxes for your **values** are checked.
 - o **Map Values** button is green, indicating that you have mapped your demographic values.
 - **Select a campaign** that you want to test - **Select an asset** to test.
- Test your values by filling in the test values already pre-filled with "test" and demographic fields (ie, country, company size, job title), if applicable.

SELECT A CAMPAIGN: (9207) asdfadf

SELECT AN ASSET: All Assets

| FIELDS | TEST VALUES |
|--------|-----------------------------------|
| | (32535) Adobe Echosign Test Asset |

| FIELDS | TEST VALUES |
|-----------------|---|
| Country | United States |
| Company Size | 5-9 |
| Job Title | Student |
| Industry | VAR/VAD/System Integrator |
| Work Email | test @madisonlogic.com NOTE: Test emails will start with number above sequential for how many tests there are. |
| First Name | test |
| Last Name | test |
| Company Name | test |
| City | test |
| Zip/Postal Code | 10010 |
| State/Region | NY |

Send/Test

Example Usage ○ Use test values that are easy to point out or easy to find

(Test company or 123 main street) ○ Testing emails with numbers, (test1, test2.. so on) ○ Testing leads allow you to test the connection between the HTTP post and your CRM database

- Finally, when you are done filling out the test values, hit **Send/Test**.
- You will see the test email address with a web response status and posting string.
 - **Internal ServerError** – Your post URL is not valid or incorrect
 - **OK** – Your test lead went through. Please check with the client to see if it went through.

Send/Test

Test Results

test1@madisonlogic.com

Web Response Status: InternalServerError

Posting String: http://www.madisonlogic.com/scriptname.extension?c_country=United%20States&c_employeesize=1%2C000-4%2C999&c_jobtitle=Marketing%20Manager%2FProfessional&c_industry=Engineering%20and%20Construction&email=test1%40madisonlogic.com&firstnam

[View Reponse Content](#)

Marketo API

- Click on the Marketo button to use the API integration
- When you click through, you will see that you need Marketo credentials – USER ID, Encryption key and Endpoint URL

MARKETO CREDENTIALS

User ID:

Encryption Key:

Endpoint URL:

Login

- **User ID** – Is used to login with Marketo to establish the lead delivery process
- **Encryption Key** – Used to verify connection from Marketo
- **Endpoint URL** – URL in which the leads will be uploaded to on Marketo.

After this, the API will allow you to map data based on the Madison Logic values and Marketo values. Once you are done, send through a test lead. Once verified, please hit save.

| MARKETO PRE-MAPPED FIELD | | | |
|-------------------------------------|--------------------|----------------|------------|
| <input checked="" type="checkbox"/> | Work Email | | |
| VALUES | YOUR COLUMN HEADER | | |
| <input checked="" type="checkbox"/> | Country | Country | Map Values |
| <input checked="" type="checkbox"/> | Professional Role | Job Title | Map Values |
| <input checked="" type="checkbox"/> | First Name | First Name | |
| <input checked="" type="checkbox"/> | Last Name | Last Name | |
| <input checked="" type="checkbox"/> | City | City | |
| <input checked="" type="checkbox"/> | Zip/Postal Code | Postal Code | |
| <input checked="" type="checkbox"/> | Phone | Phone Number | |
| <input checked="" type="checkbox"/> | State | State | |
| <input checked="" type="checkbox"/> | Publisher | Lead Comments | |
| <input checked="" type="checkbox"/> | Asset | Campaign Notes | Map Values |
| <input checked="" type="checkbox"/> | Organization Size | # of Providers | Map Values |

Frequently Asked Questions (FAQs)

- What is a Post URL? ○ A post URL is a link in which a CRM database gives out in order to receive information. In this case, the URL is used to communicate with the CRM database that leads are coming in. It is also the end point for all incoming leads from the Madison Logic database.
- Does the HTTP post tool work with any CRM?
 - As long as there is a valid post URL. Marketo, Salesforce, Eloqua and Integrate are popular CRM platforms that work with the tool.
- What is a Static Value?
 - Static values are values that remain the same throughout any lead send through HTTP post. These values may include Asset ID, Campaign ID, and more.
- How come the values are flipped when I send in a test lead?
 - The static field header should be on the right column, "Column Header", and the static value should be on the left side, under values. If they are flipped, they're on the wrong column.
- Why is the end post URL missing some field values?
 - Your post should have your required field boxes checked (on the left hand side). If they're not checked, the values will not appear.
- Some field values don't appear in the 'Customize Field' tab.
 - All these fields come from the form of the campaign. If the campaign doesn't require First name and Last Name to be collected, they won't appear as a field in the 'Customize Field' tab.
- I still need help with the HTTP post!
 - Please feel free to send an email to your Platform team at platformsupport@madisonlogic.com.