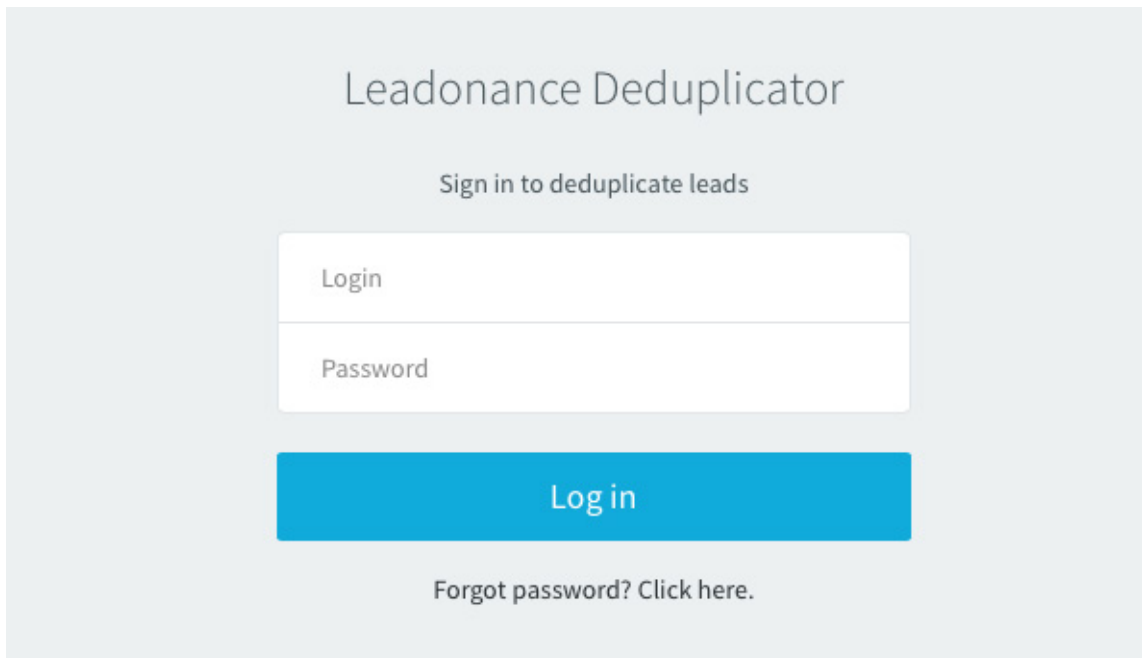


LEADONANCE DEDUPLICATOR FOR MARKETO

BASIC USER GUIDE

LOGIN

Login at: <https://deduplicator.leadonance.com> with your credentials you receive from Leadonance sales rep.



The screenshot shows a login interface for 'Leadonance Deduplicator'. The title 'Leadonance Deduplicator' is centered at the top. Below it, the instruction 'Sign in to deduplicate leads' is displayed. There are two input fields: 'Login' and 'Password'. A blue 'Log in' button is positioned below the fields. At the bottom, there is a link for 'Forgot password? Click here.'.

Leadonance Deduplicator

Sign in to deduplicate leads

Login

Password

Log in

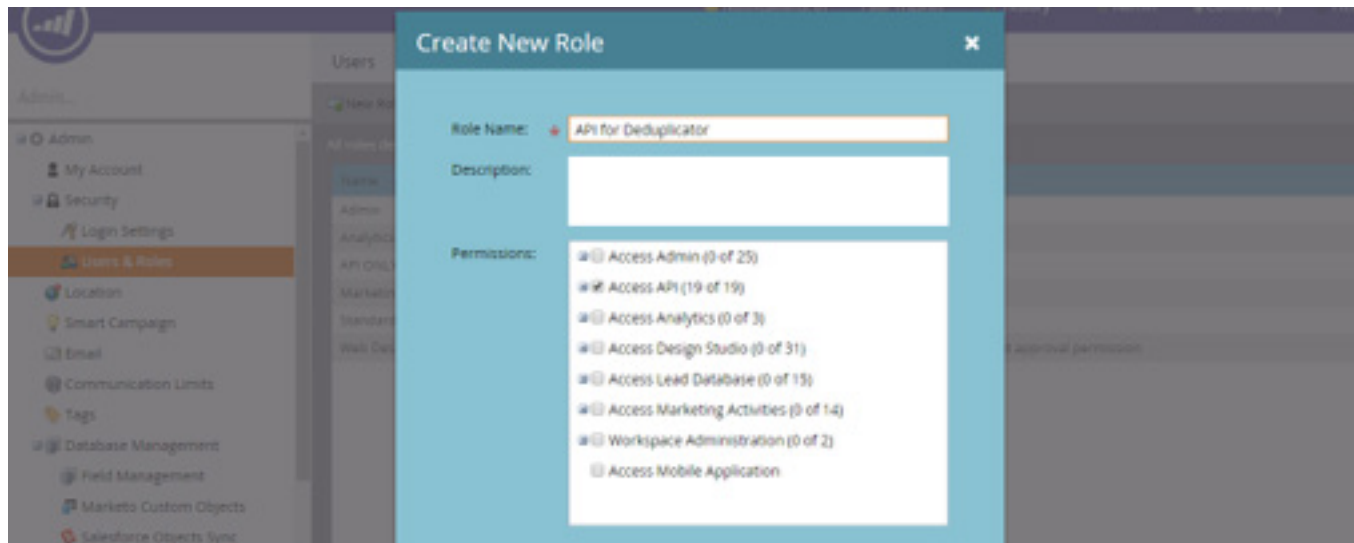
Forgot password? Click here.

2

CREATE A ROLE FOR API USER

Go to [Marketo](#) → [Admin](#) → [Users & Roles](#) and create a new role for an API-only user account that would exchange data between Deduplicator and your Marketo instance.

If you don't have access to the Admin Area in Marketo, contact your Marketo Administrator for assistance.



3

CREATE AN API USER

After you create an API-only role, create a user with that role and check the "API Only" checkbox.



4

CREATE A CUSTOM SERVICE

Next go to **Marketo Launchpoint** and create a new service with service type “Custom” – in the **API Only user** field you should see in the dropdown window the email address of the API only user you’ve just created for Deduplicator:



If you don't see an email pop-up, then you've made a mistake in one of the first three steps. Contact Leadonance for assistance at ptrushin@leadonance.com

5

SAVE YOUR API CREDENTIALS

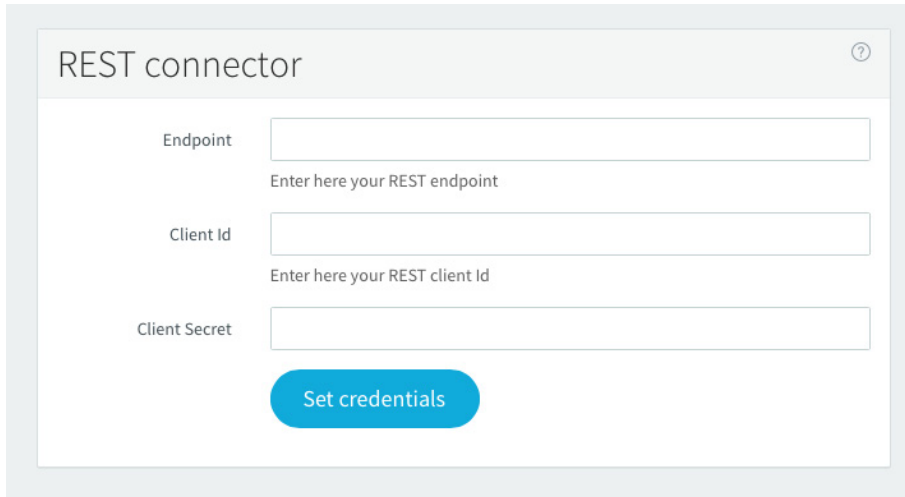
After you create the new service, click **View details** and save your Client ID and Client Secret.

Navigate to **Web Services** to get your Endpoint as well (it should look like: <https://XXX-MAM-392.mktorest.com>)

6

CONNECT THE API

Go back to <https://deduplicator.leadonance.com> and enter your Client ID, Client Secret and Endpoint into the REST Connector window:



The screenshot shows a window titled "REST connector" with a help icon in the top right corner. It contains three input fields: "Endpoint" with the placeholder text "Enter here your REST endpoint", "Client Id" with the placeholder text "Enter here your REST client Id", and "Client Secret". Below the fields is a blue button labeled "Set credentials".

After you click "Set credentials", you should see a message confirming that the credentials are set correctly.

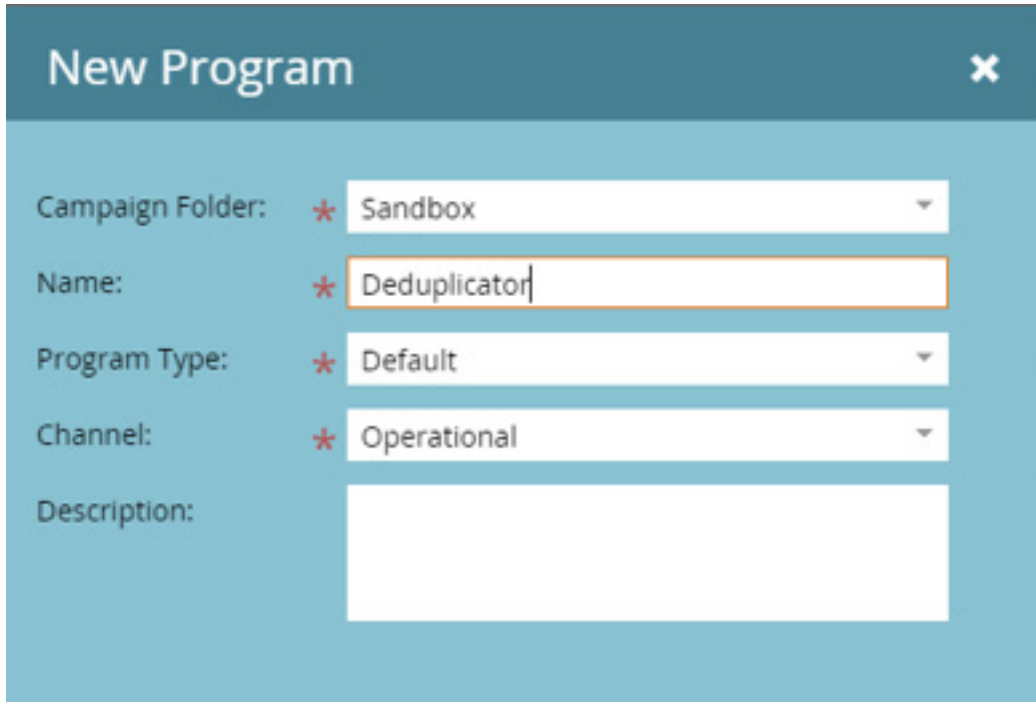
If you get an error message, check your Client ID, Client Secret and Endpoint again. If you are still having issues, contact Leadonance for assistance at ptrushin@leadonance.com

7

CREATE AN OPERATIONS PROGRAM

Next, go back to Marketo and create an operational program that will push the leads you want to analyze for duplicates into a dedicated static list.

In this guide, we'll assume that you want to analyze all your leads that have an email address.



New Program ✕

Campaign Folder: * Sandbox

Name: * Deduplicator

Program Type: * Default

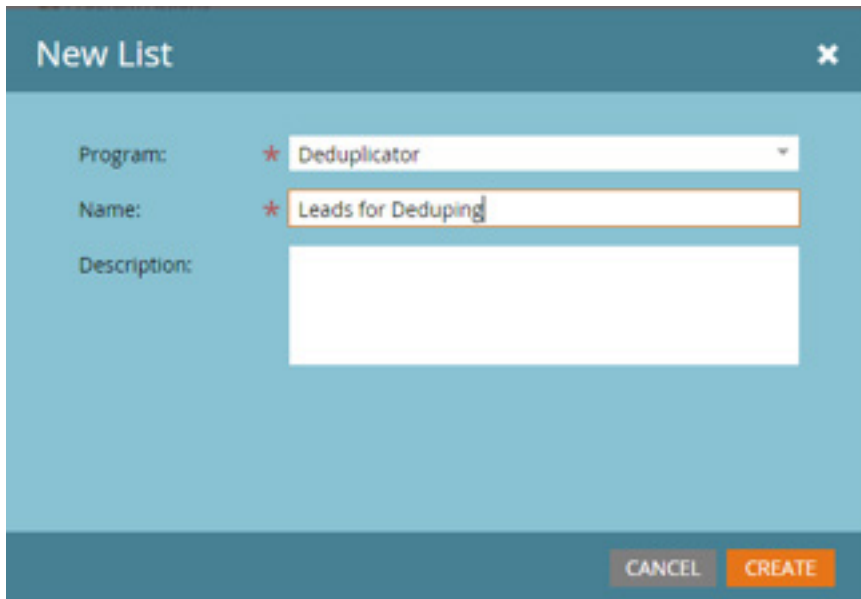
Channel: * Operational

Description:

8

CREATE A LIST

Create a static list for the program as a "local asset":



The screenshot shows a 'New List' dialog box with a dark teal header and a light blue body. The form contains three fields: 'Program' with a dropdown menu set to 'Deduplicator', 'Name' with a text input field containing 'Leads for Deduping', and 'Description' with an empty text area. At the bottom right, there are two buttons: 'CANCEL' and 'CREATE'.

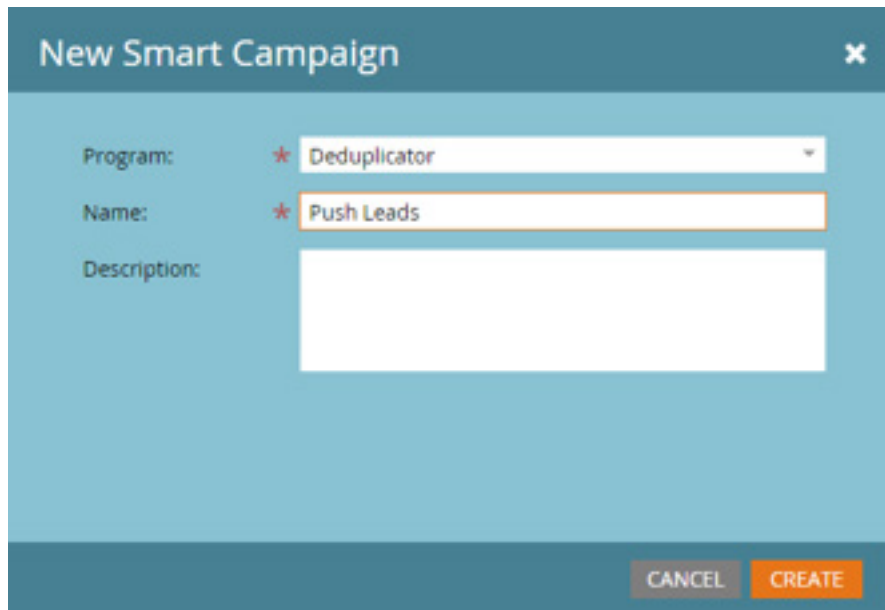
| | |
|--------------|----------------------|
| Program: | * Deduplicator |
| Name: | * Leads for Deduping |
| Description: | |

CANCEL CREATE

9

CREATE A SMART CAMPAIGN

Then create a smart campaign inside the same program that would push leads to the program daily.



The screenshot shows a modal window titled "New Smart Campaign" with a close button (X) in the top right corner. The form contains three fields:

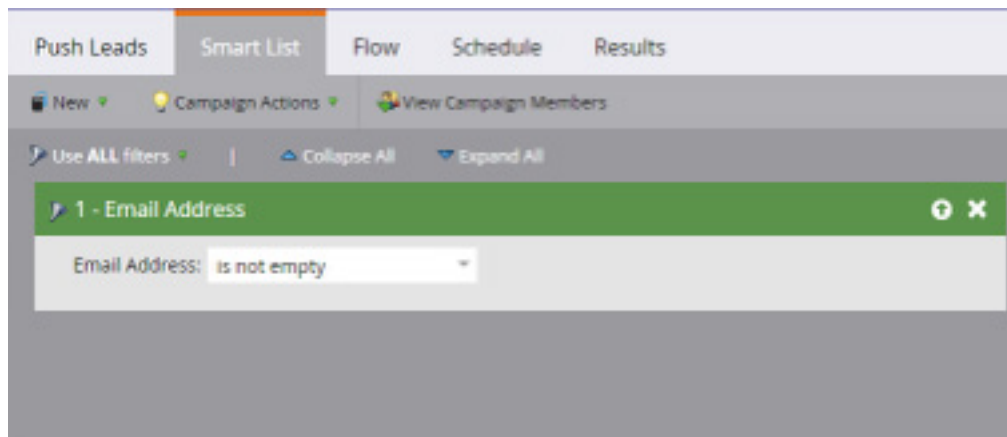
- Program:** A dropdown menu with a red asterisk icon and the text "Deduplicator".
- Name:** A text input field with a red asterisk icon and the text "Push Leads".
- Description:** A large, empty text area.

At the bottom right of the modal, there are two buttons: "CANCEL" (grey) and "CREATE" (orange).

10

SET UP A RULE

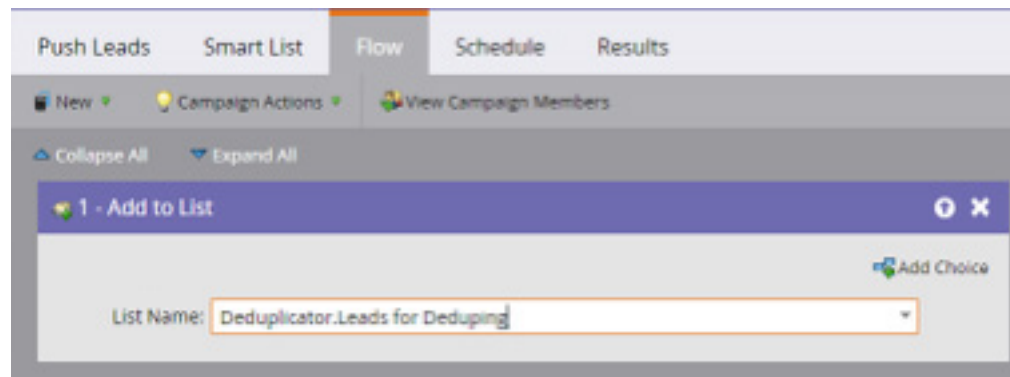
Add the rule `Email Address` — `is not empty` in the new campaign's smart list.



11

CONNECT YOUR LIST TO THE CAMPAIGN

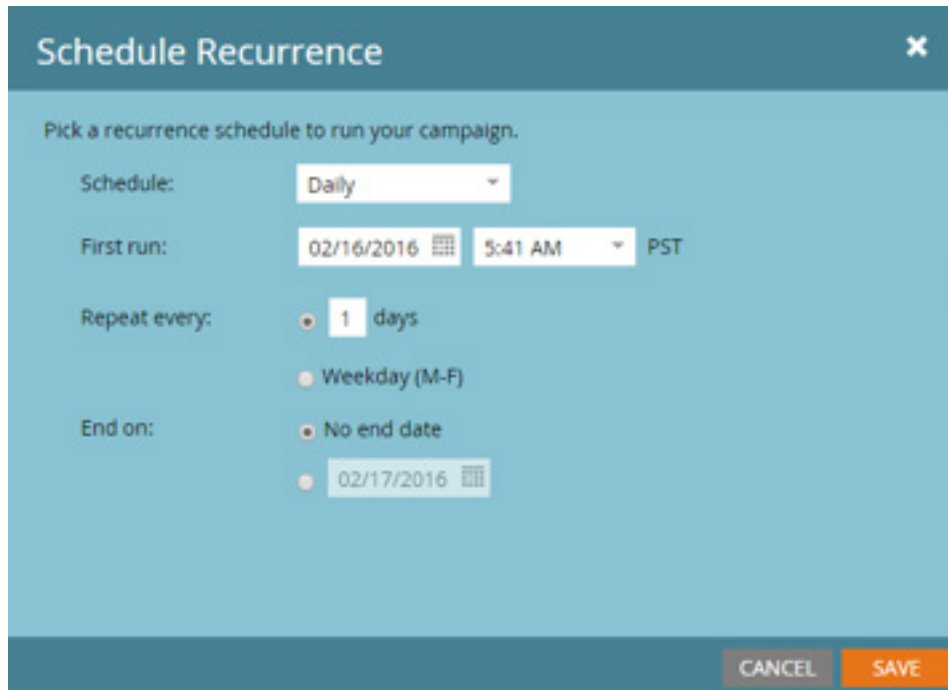
In the **Flow** tab, choose **Add to list** and type in the name of the list you've created previously.



12

SET UP RECURRENCE SCHEDULE

Go to the **Schedule** tab and click **Schedule Recurrence**. Then set up the campaign to be run daily:



Schedule Recurrence ✕

Pick a recurrence schedule to run your campaign.

Schedule:

First run:

Repeat every:

- 1 days
- Weekday (M-F)
- No end date

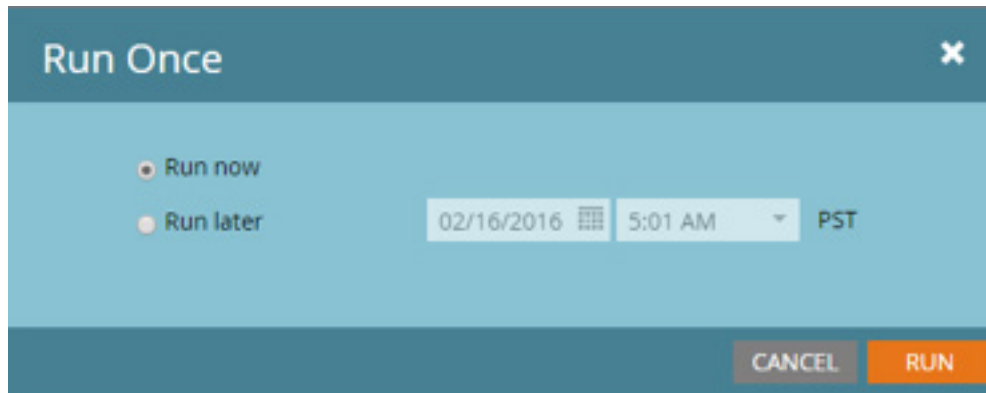
End on:

- No end date
-

13

SAVE AND RUN

Click **Save**, then click **Run once** and select **Run now** to push leads into the list immediately.



Run Once

Run now

Run later

02/16/2016 5:01 AM PST

CANCEL RUN

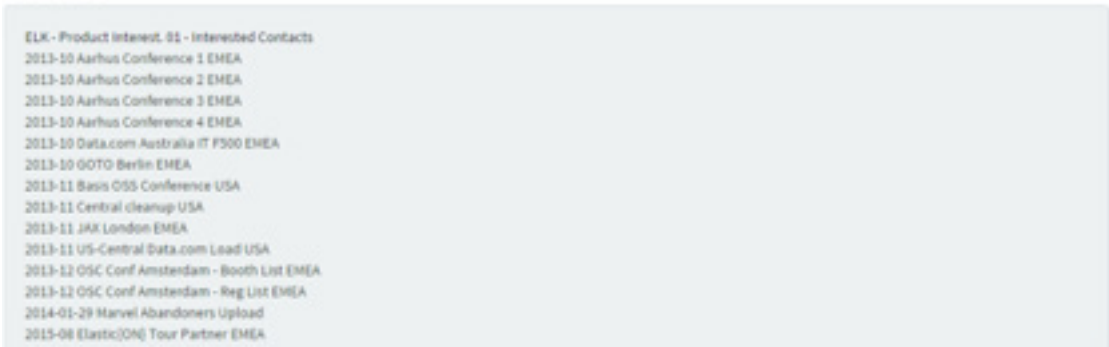
14

SELECT THE LIST

Go back to the Deduplicator interface and select the list you've just pushed leads into to sync the leads.

Be advised: The current version of Deduplicator doesn't sync leads automatically so you'd need to resync the leads manually each time you want to dedupe your lead database.

Pick a list



- ELK - Product Interest - 01 - Interested Contacts
- 2013-10 Aarhus Conference 1 EMEA
- 2013-10 Aarhus Conference 2 EMEA
- 2013-10 Aarhus Conference 3 EMEA
- 2013-10 Aarhus Conference 4 EMEA
- 2013-10 Data.com Australia IT F500 EMEA
- 2013-10 GOTO Berlin EMEA
- 2013-11 Basis OSS Conference USA
- 2013-11 Central cleanup USA
- 2013-11 JAX London EMEA
- 2013-11 US-Central Data.com Lead USA
- 2013-12 OSC Conf Amsterdam - Booth List EMEA
- 2013-12 OSC Conf Amsterdam - Reg List EMEA
- 2014-01-29 Marvel Abandoners Upload
- 2015-08 Elastic[ON] Tour Partner EMEA

15

WAIT FOR THE SYNC TO END

Depending on the size of your list, the sync may take up from 10 minutes to several hours.

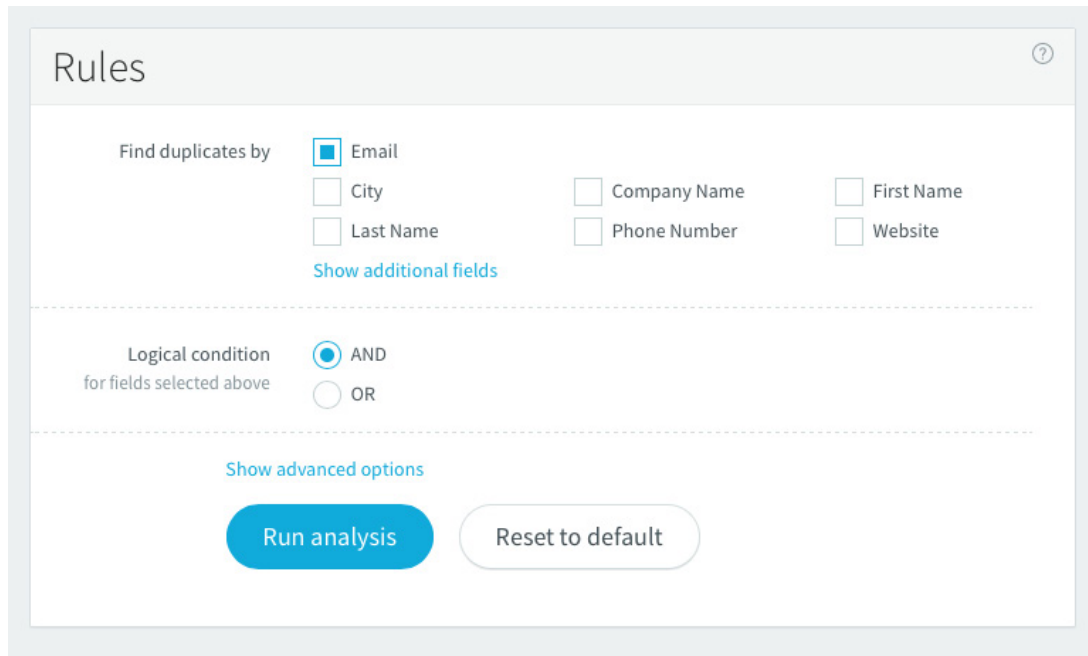
If you just want to test the app, we recommend to sync a small list of 1-2K leads. That should take around 5 minutes.

16

DEFINE WHAT IS A DUPLICATE

When the sync is over, you'll be asked to define rules as to what constitutes a "duplicate". For the purpose of this basic guide, we'll assume that a duplicate is a lead with the same email address as some other lead.

This definition of a duplicate is set up by default, so you just need to click the button `Run Analysis`.



The screenshot shows a 'Rules' configuration window with a title bar containing a question mark icon. The main content area is divided into three sections by dashed lines. The first section, 'Find duplicates by', contains six checkboxes: 'Email' (checked), 'City', 'Last Name', 'Company Name', 'Phone Number', 'First Name', and 'Website'. A link 'Show additional fields' is located below these checkboxes. The second section, 'Logical condition for fields selected above', contains two radio buttons: 'AND' (selected) and 'OR'. A link 'Show advanced options' is located below this section. At the bottom of the window are two buttons: 'Run analysis' (a solid blue button) and 'Reset to default' (a white button with a grey border).

17

CHECK THE RESULT

The analysis takes 5-10 minutes to run. When its over, you'll be taken to the master dashboard where you can see the state of your lead database.

Data analysis

Deduplication Rule
Leads are considered duplicates: by **Email**

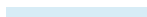
Summary
10 duplicates found in 11 leads

Duplicates
2 Loss-free duplicates (all approved)
8 Conflicting duplicates (all approved)

10 duplicates are ready to be merged

[Merge now](#) [Change rules](#)

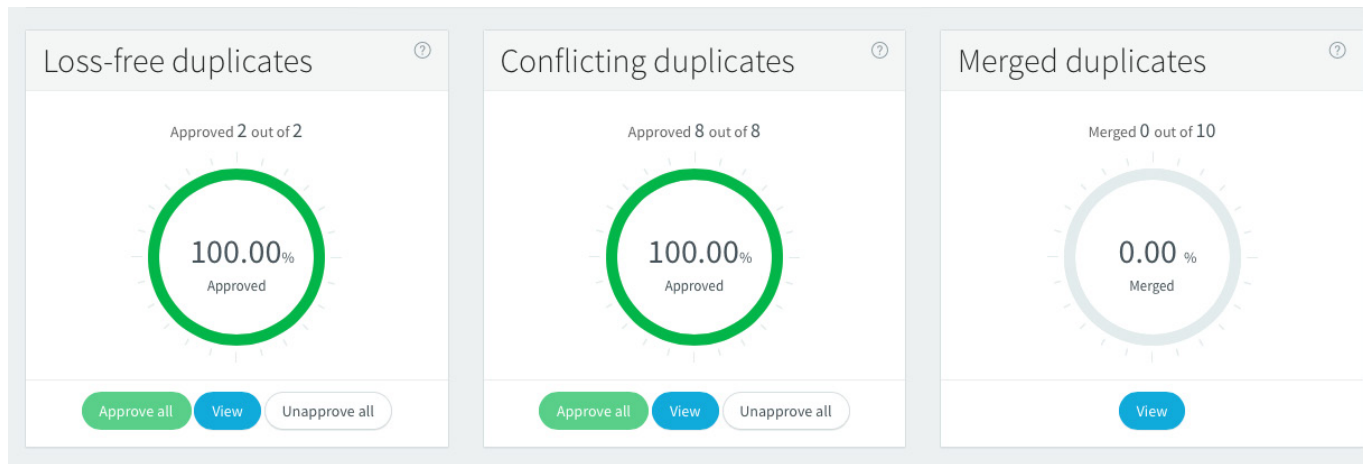
A lead and all of its duplicates constitute a "duplicate group" – a typical duplicate group in an average database has 2-3 leads, but the sky is the limit. You can have dozens of duplicates of the same lead.



18

TYPES OF DUPLICATES

When a lead and its duplicate have different values for one and the same field, its considered to be a "conflict". Hence all duplicate groups are divided into those with "loss-free duplicates" and those with "conflicting duplicates".



Loss-free duplicates are duplicates that can be merged without any loss of data. Conflicting duplicates, on the other hand, if merged automatically would lead to loss of data due to conflicts.

Before any duplicates are merged, they need to be approved for the merge. Loss-free duplicates are approved by default. Conflicting duplicates require user action to be approved.

“Leadonance Deduplicaton has saved me hours de-duping in over 10 000 records in Marketo.”



YUKO TAKAGI
Marketing Automation Manager,
Elasticsearch

QUESTIONS? CONTACT US!

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