Posting to LeadMaster Custom Forms

There are two ways to post data to LeadMaster custom forms:

1. HTTP post using your language of choice (Javascsript, VBscript, Java etc). You'll need to be registered with a user ID & Password as 'Lead Provider' to post data to LeadMaster. Please note: this is not the same user ID & Password that you use to access LeadMaster, this user ID is only for posting data. You'll find a detailed explanation by following this link: Lead Provider Integration
http://www.leadmaster.com/LeadMaster-Library/Marketing-Literature/LeadMaster%20-%20Lead%20Provider%20Integration.pdf

2. HTTP post from a web form / landing page where you'll use the 'Map Web Forms to Custom Forms' tool in the Administration section of LeadMaster. Please note: you will need the appropriate privileges to access the 'Map Web Forms to Custom Forms' tool. You'll find a step-by-step guide by following this link: Landing Page Integration
http://www.leadmaster.com/LeadMaster-CRM-Solutions/LeadMaster-CRM/CRM-Features-LeadMaster/CRM-Landing-Page-Integration.asp

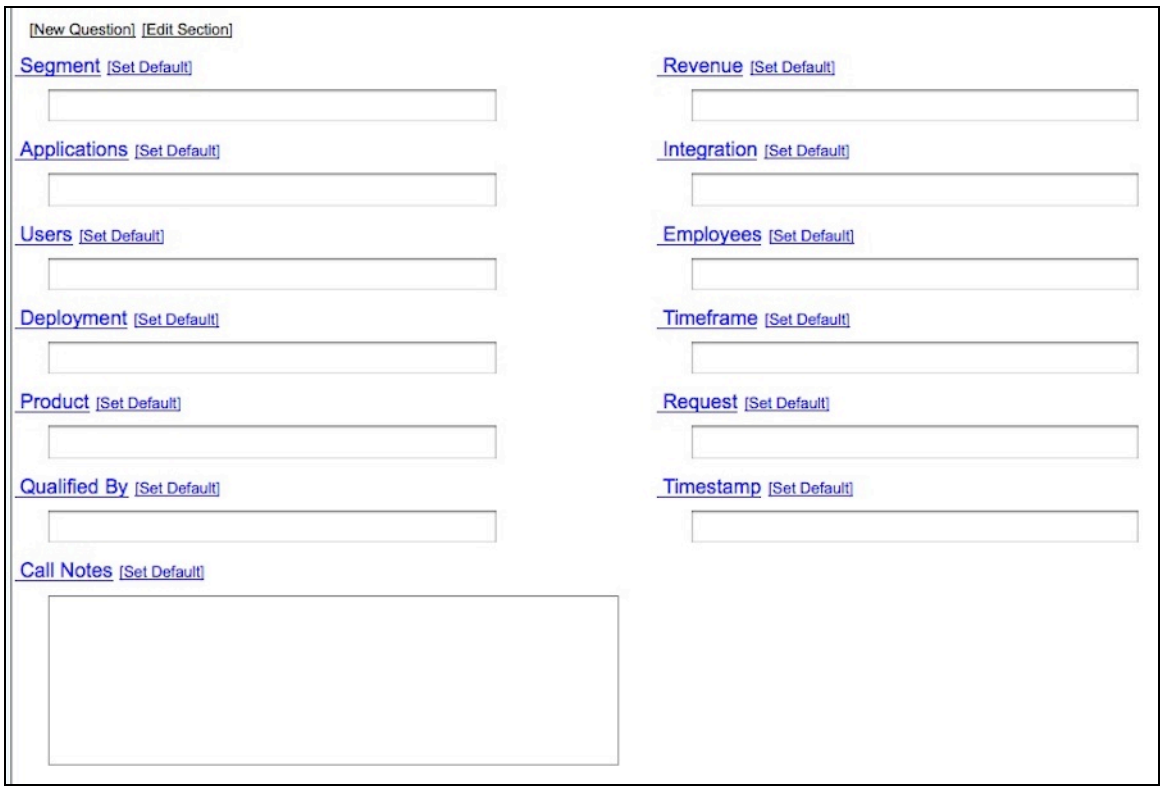
This document explains #1 above. Since many people receive leads via email and want to post the contents in both the database and a custom form, this document explains how to parse an email and post it to both the database fields and custom form fields. The concept is the same both with and without the email parse, the only difference is when simply posting you don't have to extract the data from the email first.

Below is the email we'll parse to get the data. It's important to note that for an email to be correctly parsed consistently it must be received in the same format each time.

The following new lead was qualified by Jordan at Software Advice. Please feel free to mention

Company:	LeadMaster Test
Segment:	Transportation
Size:	$1 million to $5 million
Applications:	Sales Automation
Integration:	Best-of-breed
Users:	6 - 10 users
Number of Employees:	6 to 10 employees
Deployment:	Not Determined
Call Notes:	Global Travel is a travel agency that focuses on corporate bookings. They do Rolodex, and file-folders. They are evaluating other solutions because there's contact information and interactions. Would like to generate reports on sales a open to both on-premise and web-based deployment. They need ten users. Th systems cost and are OK evaluating their options. Said a call any time would
Timeframe:	Next 30 days
Product:	LeadMaster Lead Management
Name:	Andy Brownell
Job Title:	Owner
Mobile:	(416) 999-7419
Email:	tejani_serena@hotmail.com
Address:	900 Don Mills Road
City:	Toronto
State:	ON
ZIP code:	M3C 3N4
Country:	Canada
Request:	Demonstration
Qualified By:	Jordan
Timestamp:	5/12/11 16:40 CDT

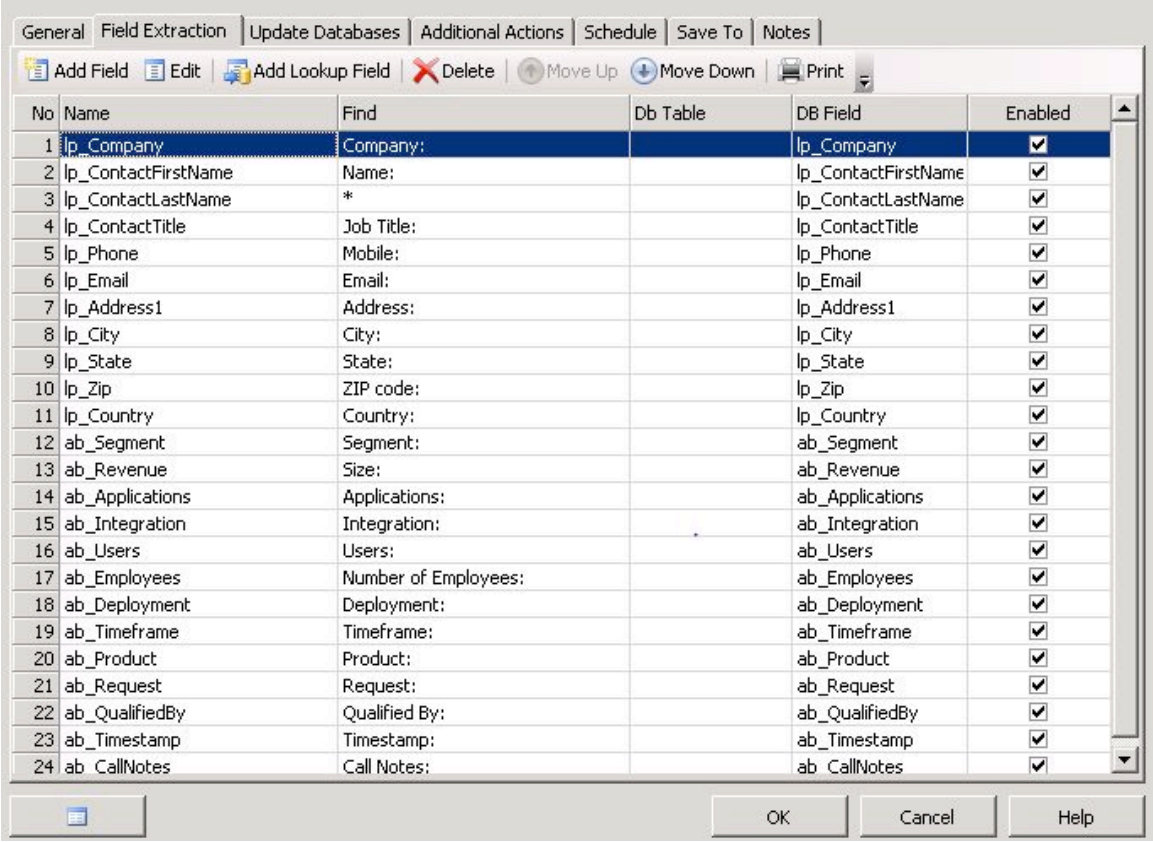
Step 1 – Create a custom form with the fields you want to post the data to. In this case the demographic fields from the email (Company, First Name, Last Name, Title, Phone etc.) are posting to the demographic fields in LeadMaster and all the rest are posting to the custom form (Segment, Revenue, Applications, Integration etc.)



Step 2 – Create an email parse. LeadMaster provides mapping for all the standard fields. Those fields are identified with the prefix 'lp_'. You can find additional information about this in the 'LeadMaster / Lead Provider Integration' documentation.

http://www.leadmaster.com/LeadMaster-Library/Marketing-Literature/LeadMaster - Lead Provider Integration.pdf

To make it easier to identify the different between the standard fields and the custom form fields, the custom form fields have the prefix 'ab_'.



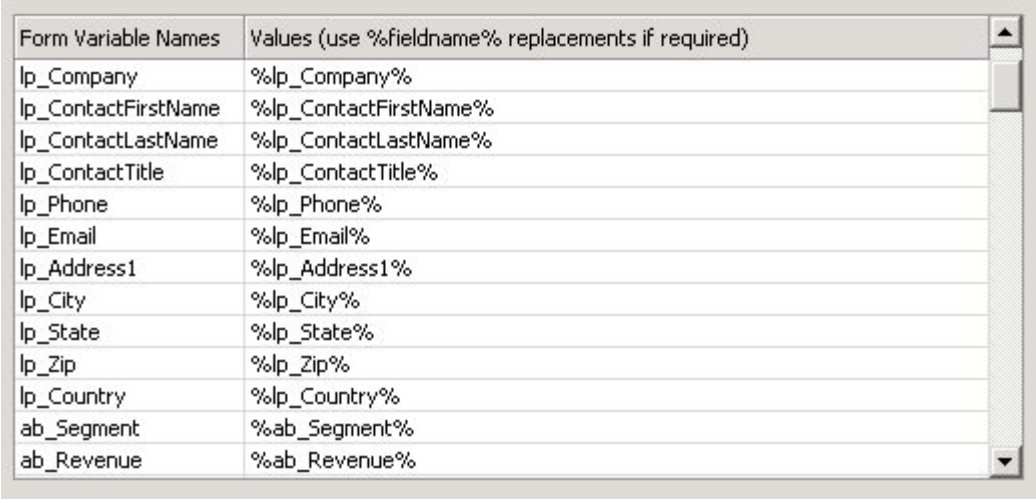
General | Field Extraction | Update Databases | Additional Actions | Schedule | Save To | Notes

Add Field | Edit | Add Lookup Field | Delete | Move Up | Move Down | Print

No	Name	Find	Db Table	DB Field	Enabled
1	lp_Company	Company:		lp_Company	☑
2	lp_ContactFirstName	Name:		lp_ContactFirstName	☑
3	lp_ContactLastName	*		lp_ContactLastName	☑
4	lp_ContactTitle	Job Title:		lp_ContactTitle	☑
5	lp_Phone	Mobile:		lp_Phone	☑
6	lp_Email	Email:		lp_Email	☑
7	lp_Address1	Address:		lp_Address1	☑
8	lp_City	City:		lp_City	☑
9	lp_State	State:		lp_State	☑
10	lp_Zip	ZIP code:		lp_Zip	☑
11	lp_Country	Country:		lp_Country	☑
12	ab_Segment	Segment:		ab_Segment	☑
13	ab_Revenue	Size:		ab_Revenue	☑
14	ab_Applications	Applications:		ab_Applications	☑
15	ab_Integration	Integration:		ab_Integration	☑
16	ab_Users	Users:		ab_Users	☑
17	ab_Employees	Number of Employees:		ab_Employees	☑
18	ab_Deployment	Deployment:		ab_Deployment	☑
19	ab_Timeframe	Timeframe:		ab_Timeframe	☑
20	ab_Product	Product:		ab_Product	☑
21	ab_Request	Request:		ab_Request	☑
22	ab_QualifiedBy	Qualified By:		ab_QualifiedBy	☑
23	ab_Timestamp	Timestamp:		ab_Timestamp	☑
24	ab_CallNotes	Call Notes:		ab_CallNotes	☑

OK | Cancel | Help

Step 3 – Once all the fields have been extracted from the email, the data needs to be sent to LeadMaster. In this example the data is being sent via HTTP Post.

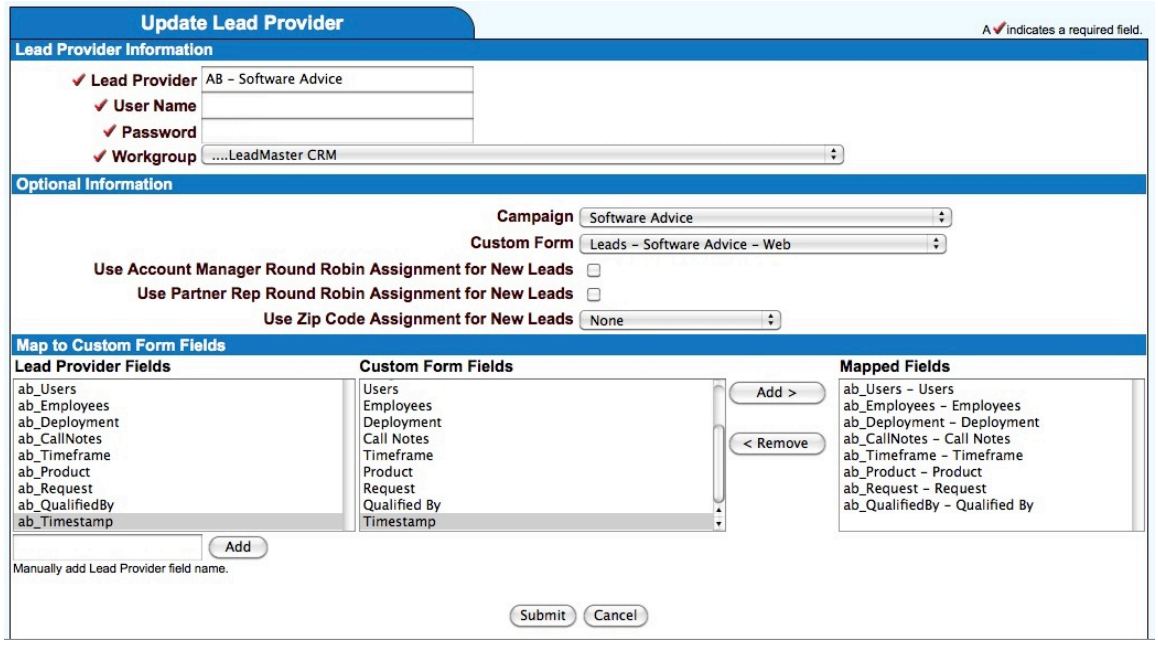


Form Variable Names	Values (use %fieldname% replacements if required)
lp_Company	%lp_Company%
lp_ContactFirstName	%lp_ContactFirstName%
lp_ContactLastName	%lp_ContactLastName%
lp_ContactTitle	%lp_ContactTitle%
lp_Phone	%lp_Phone%
lp_Email	%lp_Email%
lp_Address1	%lp_Address1%
lp_City	%lp_City%
lp_State	%lp_State%
lp_Zip	%lp_Zip%
lp_Country	%lp_Country%
ab_Segment	%ab_Segment%
ab_Revenue	%ab_Revenue%

Form Variable Names	Values (use %fieldname% replacements if required)
ab_Revenue	%ab_Revenue%
ab_Applications	%ab_Applications%
ab_Integration	%ab_Integration
ab_Users	%ab_Users%
ab_Employees	%ab_Employees%
ab_Deployment	%ab_Deployment%
ab_Timeframe	%ab_Timeframe%
ab_Product	%ab_Product%
ab_Request	%ab_Request%
ab_QualifiedBy	%ab_QualifiedBy%
ab_Timestamp	%ab_Timestamp%
ab_CallNotes	%ab_CallNotes%
lp_Comments	%msg_body%

Step 4 – All that remains is to map the data that is being sent via HTTP post to the custom form. To do this you'll need to be set up as a 'Lead Provider' and have the appropriate access privileges.

Simply type in the lead provider fields exactly as they were entered in the HTTP post.



You'll notice that only the custom form fields (those starting with 'ab_') are mapped. That's because the standard fields go directly into the database.