LeadMaster / Lead Provider Integration

About LeadMaster / Lead Provider Integration

LeadMaster / Lead Provider Integration provides the ability for a lead provider to automate the process of submitting leads to LeadMaster

Registering as a Lead Provider

The following information is maintained for each lead provider submitting leads to LeadMaster:

1. Name – the name of the lead provider. For each lead submitted to LeadMaster by the lead provider, the "Edited By" field is set initially to the name of the lead provider.
2. Username – the username used (along with the password) to authenticate the lead provider before leads are accepted.
3. Password – the password used (along with the username) to authenticate the lead provider before leads are accepted.

The following information is maintained for each workgroup to which a lead provider will submit leads:

1. Campaign – Leads submitted by the lead provider can be associated with a specific campaign.
2. Zip code assignment – Leads submitted by the lead provider can be assigned to an account manager and / or partner rep based on the zip code associated with the lead (if included).
3. Use round robin for account manager assignment – leads submitted by the lead provider can be assigned to an account manager using the round robin queue.
4. Use round robin for partner rep assignment – leads submitted by the lead provider can be assigned to a partner rep using the round robin queue.
5. Custom Form – Leads submitted by the lead provider can include additional fields beyond the basic demographic fields that can be used to populate a custom form. Please contact your LeadMaster representative as mapping will need to be done on the back end for this.

Note that leads are not assigned unless zip code assignment, account manager round robin assignment or partner rep round robin assignment are enabled for the lead provider / workgroup.

Overall Process

1. The lead provider registers with LeadMaster for one or more workgroups.
2. The lead provider develops and implements an HTTP post call using their development language of choice (javascript, vbscript, java, etc.) to pass information about a lead to LeadMaster.
3. The lead provider receives and processes the response to an HTTP post call.

The URL for posting a lead to LeadMaster is https://util1.crmtool.net/lp_NewLead.asp *

* When Posting Leads to version 4, APP4 & Smart Forms

1. If the HTTP post call includes data going into a Smart Form.
2. If the user is logging into the APP4 version of the application.

You must use https://util1.crmtool.net/lp_NewLeadAPP4.asp otherwise the form will not be visible.

Required Fields for Posting a Lead to LeadMaster

The following fields are required for a lead provider to post a lead to LeadMaster (please contact your LeadMaster representative for these credentials):

Name	*Code*	*Notes*
Workgroup identifier	lp_CompanyID	Provided as part of registration
Lead provider username	lp_Username	Provided as part of registration
Lead provider password	lp_Password	Provided as part of registration

Basic Demographic Fields Available for Posting a Lead

The following basic demographic fields are available to a lead provider to use when posting a lead to LeadMaster:

Name	*Code*	*Maximum length*	*Notes*
Contact prefix	lp_ContactPrefix	25	
Contact first name	lp_ContactFirstName	37	
Contact last name	lp_ContactLastName	37	
Contact full name	Lp_ContactFullName	75	The first name will be separated from the last name based upon the first space encountered and placed in lp_ContactFirstName and lp_ContactLastName. This field will be ignored if either lp_ContactFirstName or lp_ContactLastName is used in the post.
Contact title	lp_ContactTitle	75	
Contact title code	lp_ContactTitleCode	25	
Contact function code	lp_ContactFunctionCode	25	
Company	lp_Company	75	
Address line 1	lp_Address1	75	
Address line 2	lp_Address2	75	
Address line 3	lp_Address3	75	
City	lp_City	50	
State	lp_State	25	Use 2-character state code (e.g. GA)
Zip	lp_Zip	12	
Country	lp_Country	25	Use 3-character country code (e.g. USA)
Web address	lp_WebAddress	150	
Phone	lp_Phone	25	
Secondary Phone	lp_AltPhone	25	
Cell / Mobile	lp_CellPhone	25	
Fax	lp_FaxPhone	25	
Email address	lp_Email	100	
Special Interest 1	lp_UserField1	150	
Special Interest 2	lp_UserField2	150	
Special Interest 3	lp_UserField3	150	
Special Interest 4	lp_UserField4	150	
Special Interest 5	lp_UserField5	150	
Special Interest 6	lp_UserField6	150	
Special Interest 7	lp_UserField7	150	
Special Interest 8	lp_UserField8	150	
Special Interest 9	lp_UserField9	150	
Special Interest 10	lp_UserField10	150	
Special Interest 11	lp_UserField11	150	

Special Interest 12	lp_UserField12	150	
Special Interest 13	lp_UserField13	150	
Special Interest 14	lp_UserField14	150	
Special Interest 15	lp_UserField15	150	
Special Interest 16	lp_UserField16	150	
Special Interest 17	lp_UserField17	150	
Special Interest 18	lp_UserField18	150	
Lead Status	lp_LeadStatus	50	
Initial Status	lp_InitialStatus	50	
Lead Value	lp_LeadValue	20	Numeric value expected
Campaign ID	lp_CampaignID	25	
Sales Stage	lp_SalesStage	75	
Lead Source	lp_LeadSource	50	
Forecast Date	lp_ForecastDate	20	Use mm/dd/yyyy format
Probability	lp_Probability	20	Decimal value expected between 0.1 and 1.0
Contacted Date	lp_ContactedDate	20	Use mm/dd/yyyy format
Company Revenue	lp_CompanyRevenue	20	
Number of Employees	lp_NumEmployees	20	
Custom	lp_Custom	37	
UniqueID	lp_UniqueID	37	
Ultimate Duns	lp_UserField26	37	
Site Duns	lp_UserField27	37	
Group	lp_GroupID	5	Use the id of the group
Group Name	lp_GroupName		The name of the group (used to search for the id of the group)
Account Manager	lp_AccountMgrID	5	Use the id of the account manager
Account Manager Name	lp_AccountMgrName		The name of the account manager (used to search for the id of the account manager)
Partner	lp_PartnerID	5	Use the id of the partner
Partner Name	lp_PartnerName		The name of the partner (used to search for the id of the partner)
Partner Rep	lp_PartnerRepID	5	Use the id of the partner rep
Partner Rep Name	lp_PartnerRepName		The name of the partner rep (used to search for the id of the partner rep)
HighlightComments	lp_HighlightComments	5000	
GeneralComments	lp_GeneralComments	5000	
Comments	lp_Comments	5000	

Additional Fields Available for Populating a Custom Form

The following fields are available to a lead provider to use when posting a lead to LeadMaster and populating a custom form (require mapping on the back end):

Name	*Code*	*Maximum length*	*Notes*
Custom Form – Field 1	lp_Question1		
Custom Form – Field 2	lp_Question2		
Custom Form – Field 3	lp_Question3		
Custom Form – Field 4	lp_Question4		
Custom Form – Field 5	lp_Question5		
Custom Form – Field 6	lp_Question6		
Custom Form – Field 7	lp_Question7		
Custom Form – Field 8	lp_Question8		

Custom Form – Field 9	lp_Question9		
Custom Form – Field 10	lp_Question10		
Custom Form – Field 11	lp_Question11		
Custom Form – Field 12	lp_Question12		
Custom Form – Field 13	lp_Question13		
Custom Form – Field 14	lp_Question14		
Custom Form – Field 15	lp_Question15		
Custom Form – Field 16	lp_Question16		
Custom Form – Field 17	lp_Question17		
Custom Form – Field 18	lp_Question18		
Custom Form – Field 19	lp_Question19		
Custom Form – Field 20	lp_Question20		

When posting to a custom form, information for the lead provider must include an associated custom form and the custom form fields being posted to (lp_Question1 – lp_Question20) must be mapped to specific fields on the selected custom form (see 'Administration' / 'Lead Providers' / 'Update Lead Provider' – 'Optional Information' and 'Map to Custom Form Fields' sections).

Notes on how a posted field is used to populate an associated custom form field:

1. Text question – data from the posted field populates the value of the custom form field.
    • Dates must be in the format 'mm/dd/yyyy'.
    • Numbers must include only numeric digits.
    • Maximum length is 2000 characters for other than dates and numbers.
2. Text area question – data from the posted field populates the value of the custom form field. Maximum length is 2000 characters.
3. Radio question – data from the posted field is matched to the internal value of one of the responses to the custom form field.
4. Checkbox question – data from the posted field can include one or more values (must be comma-separated). Each value from the data is matched to the internal value of one of the responses to the custom form field.
5. Single select question – data from the posted field is matched to the internal value of one of the responses to the custom form field.
6. Multiple select question – data from the posted field can include one or more values (must be comma-separated). Each value from the data is matched to the internal value of one of the responses to the custom form field.

Additional Fields Available for Posting a Lead

If additional fields beyond the basic demographic fields are needed by the lead provider to post leads to LeadMaster, they will be provided as part of the registration process. The list of additional fields will include for each field the name of the field, code, maximum length and any notes about the field.

Additional Fields

The following additional fields can be used when posting a lead to LeadMaster:

Name	*Code*	*Purpose*
Failure email address	lp_FailureEmailAddress	If a problem is encountered when posting a lead, an email address with details of the issue is sent to this email address.
Lead provider username	lp_SuccessEmailAddress	If a lead is successfully posted, an email message is sent to this email address.

Response page	lp_ResponsePage	A url for a response page to be displayed if a lead is successfully posted.

Example

The following example uses javascript to post a lead to LeadMaster:

```
function postLead() {
    if (window.XMLHttpRequest) {
        http_request = new XMLHttpRequest();
        if (http_request.overrideMimeType) {
            http_request.overrideMimeType('text/xml');
        }
    } else if (window.ActiveXObject) {
        try {
            http_request = new ActiveXObject("Msxml2.XMLHTTP");
        } catch (e) {
            try {
                http_request = new ActiveXObject("Microsoft.XMLHTTP");
            } catch (e) {}
        }
    }
    if (!http_request) {
        return false;
    }
    var posting_url;

    // posting url
    posting_url = "http://www.crmtool.net/lp_NewLead.asp?";
    // workgroup identifier
    posting_url = posting_url + "lp_CompanyID=9999";
    // lead provider username and password
    posting_url = posting_url + "&lp_Username=leadprovider";
    posting_url = posting_url + "&lp_Password=lp1234";
    // lead data
    posting_url = posting_url + "&lp_ContactPrefix=Mr.";
    posting_url = posting_url + "&lp_ContactFirstName=Bill";
    posting_url = posting_url + "&lp_ContactLastName=Smith";
    posting_url = posting_url + "&lp_ContactTitle=CEO";
    posting_url = posting_url + "&lp_Company=AXE Corp";
    posting_url = posting_url + "&lp_Address1=1 Main Street";
    posting_url = posting_url + "&lp_Address2=Suite 200";
    posting_url = posting_url + "&lp_Address3=Box 100";
    posting_url = posting_url + "&lp_City=Atlanta";
    posting_url = posting_url + "&lp_State=GA";
    posting_url = posting_url + "&lp_Zip=30012";
    posting_url = posting_url + "&lp_Country=USA";
    posting_url = posting_url + "&lp_WebAddress=www.leadmaster.com";
    posting_url = posting_url + "&lp_Phone=770 555 1212";
    posting_url = posting_url + "&lp_AltPhone=770 555 1213";
    posting_url = posting_url + "&lp_CellPhone=770 555 1214";
    posting_url = posting_url + "&lp_FaxPhone=770 555 1215";
    posting_url = posting_url + "&lp_Email=bsmith@axe.com";
    http_request.open('GET', posting_url, true);
    http_request.send(null);
}
```

Response from Posting a Lead to LeadMaster

The following xml responses are returned from the posting:

Condition	Response
Invalid username (lp_Username) or password (lp_Password)	<lp> <response>0</response> <msg>invalid username or password</msg> <lp>

Invalid company id (lp_CompanyID)	`<lp>`
	`<response>0</response>`
	`<msg>invalid companyid</msg>`
	`<lp>`

Error inserting lead	`<lp>`
	`<response>0</response>`
	`<msg>database error</msg>`
	`<lp>`

Success	`<lp>`
	`<response>1</response>`
	`<msg></msg>`
	`<lp>`

Posting Leads via Email

As an alternative to developing and implementing an HTTP post call using their development language of choice (javascript, vbscript, java, etc.) to pass information about a lead to LeadMaster, a lead provider can pass information via email. Information about the lead is parsed from the message body of the email message and added to LeadMaster.

To pass information about a lead to LeadMaster, send an email message to the following email address: **leadproviderfeed@leadmaster.com**.

The message body of the email message must contain the information about the lead provider – workgroup identifier, lead provider username, and lead provider password (all required, one field per line) in the following format: code: value

For example: lp_CompanyID: 9999

The message body of the email message must contain the information about the lead (one field per line) in the following format: code: value

For example: lp_Company: AXE Corp

Note: If the lead provider is posting comments to be associated with the record, multiple lines of comments can be included. The field "lp_Comments:" must be the last field in the body of the email message, since all text following the "lp_Comments:" label and all subsequent lines in the body of the email message are included for the comments.

Note: If the lead provider cannot format the message body of the email message as described above, a custom email message parsing routine can be developed for the lead provider as a paid services offering.

Note: Posting leads via email does not support posting fields to a custom form. If needed, a custom email message parsing routine can be developed as a paid services offering that does include custom form fields.

Example

The following example is the content of message body of the email message sent to leadproviderfeed@leadmaster.com to post a lead to LeadMaster:

lp_CompanyID: 9999
lp_Username: leadprovider
lp_Password: lp1234

lp_ContactPrefix: Mr.
lp_ContactFirstName: Bill
lp_ContactLastName: Smith
lp_ContactTitle: CEO

lp_Company: AXE Corp
lp_Address1: 1 Main Street
lp_Address2: Suite 200
lp_Address3: Box 100
lp_City: Atlanta
lp_State: GA
lp_Zip: 30012
lp_Country: USA
lp_WebAddress: www.leadmaster.com
lp_Phone: 770 555 1212
lp_AltPhone: 770 555 1213
lp_CellPhone: 770 555 1214
lp_FaxPhone: 770 555 1215
lp_Email: bsmith@axe.com

Response from Posting a Lead via Email to LeadMaster

There is no response to a lead posted via email.

To Register as Lead Provider

To register as lead provider, provide the following:

Name	*Value*		*Notes*
Lead provider name			Required
LeadMaster database name			Identifies the workgroup leads will be added to – required
LeadMaster workgroup name			Identifies the workgroup leads will be added to – required
Campaign			Provide a ***campaign id*** (must be an existing campaign in the workgroup) – optional
Lead Assignment – Use zip code assignment			Provide a ***logic name*** (must be an existing zip logic group in the workgroup) - optional
Lead Assignment – Use account manager round robin			***Yes*** if using account manager round robin for lead assignment – optional
Lead Assignment – Use partner rep round robin			***Yes*** if using partner rep round robin for lead assignment - optional
A list of additional fields and a description of each field needed for posting a lead	*Name*	*Description*	For fields that are not in the list of 'Basic Demographic Fields Available for Posting a Lead' – optional

Custom form name		The name of an existing custom form which contains a field for each field in the list of additional fields needed for posting a lead – required if additional fields are needed for posting a lead