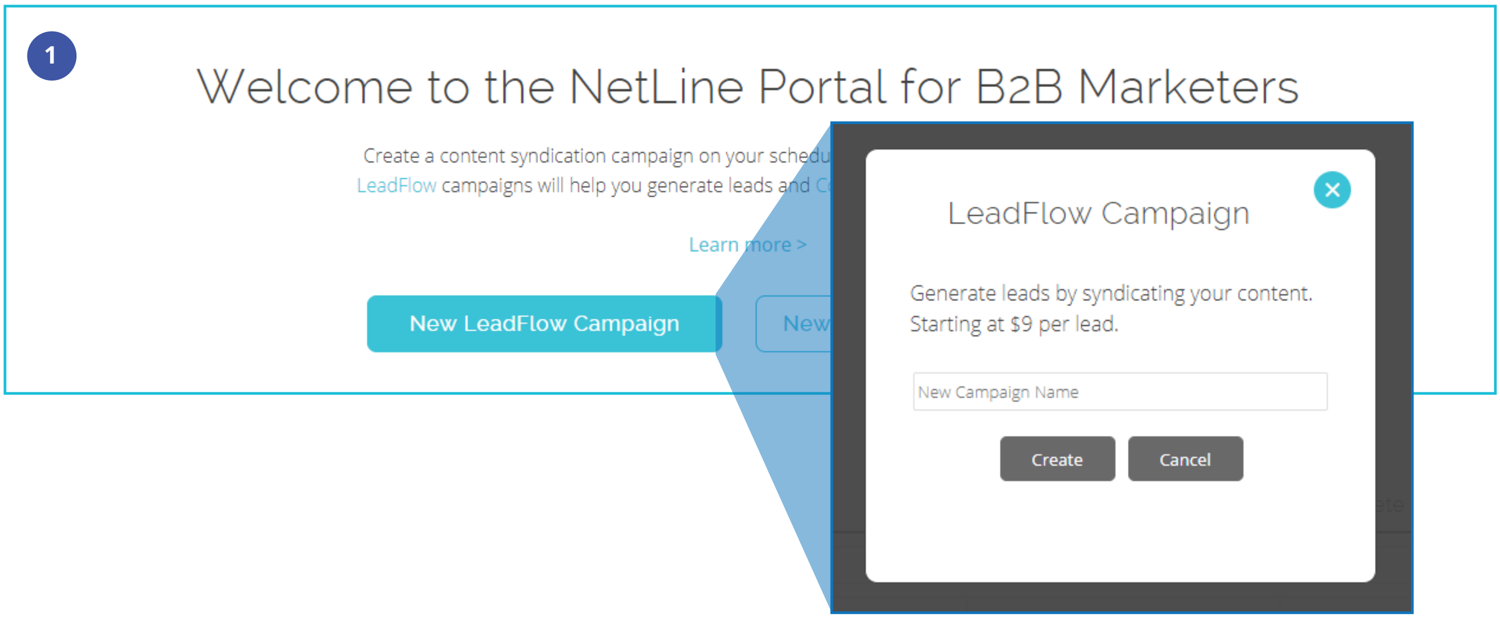
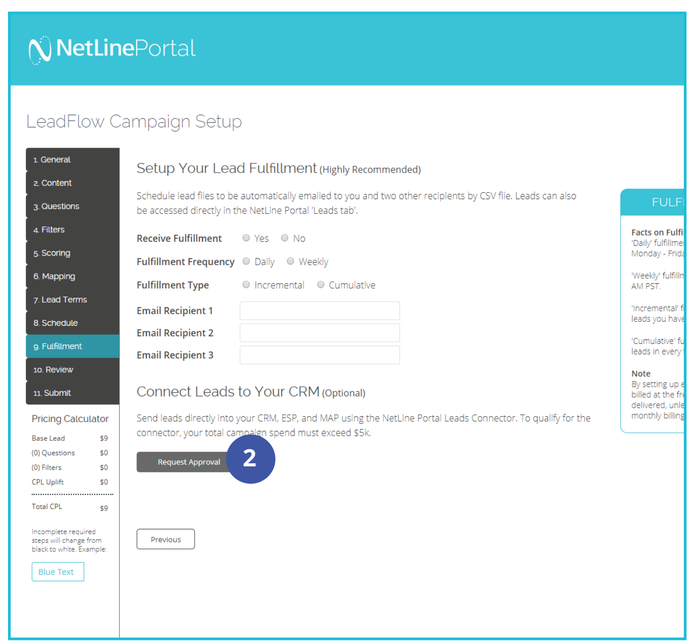
Engage with your leads faster with NetLine's Connectors.

Connect your newly generated leads to your marketing automation platform (MAP) or CRM solution with the NetLine Portal.



Request Connector Approval

1. After setting up your free NetLine Portal account, you can request access to connect to your MAP or CRM by creating a draft LeadFlow campaign. You can start creating a campaign from either the 'Welcome' or 'Campaigns' pages.
2. Once you name your draft campaign, you can request approval on the 9th step, '9. Fulfillment' of the campaign creation process. Approval will be granted within 1 business day.



Choose A Method

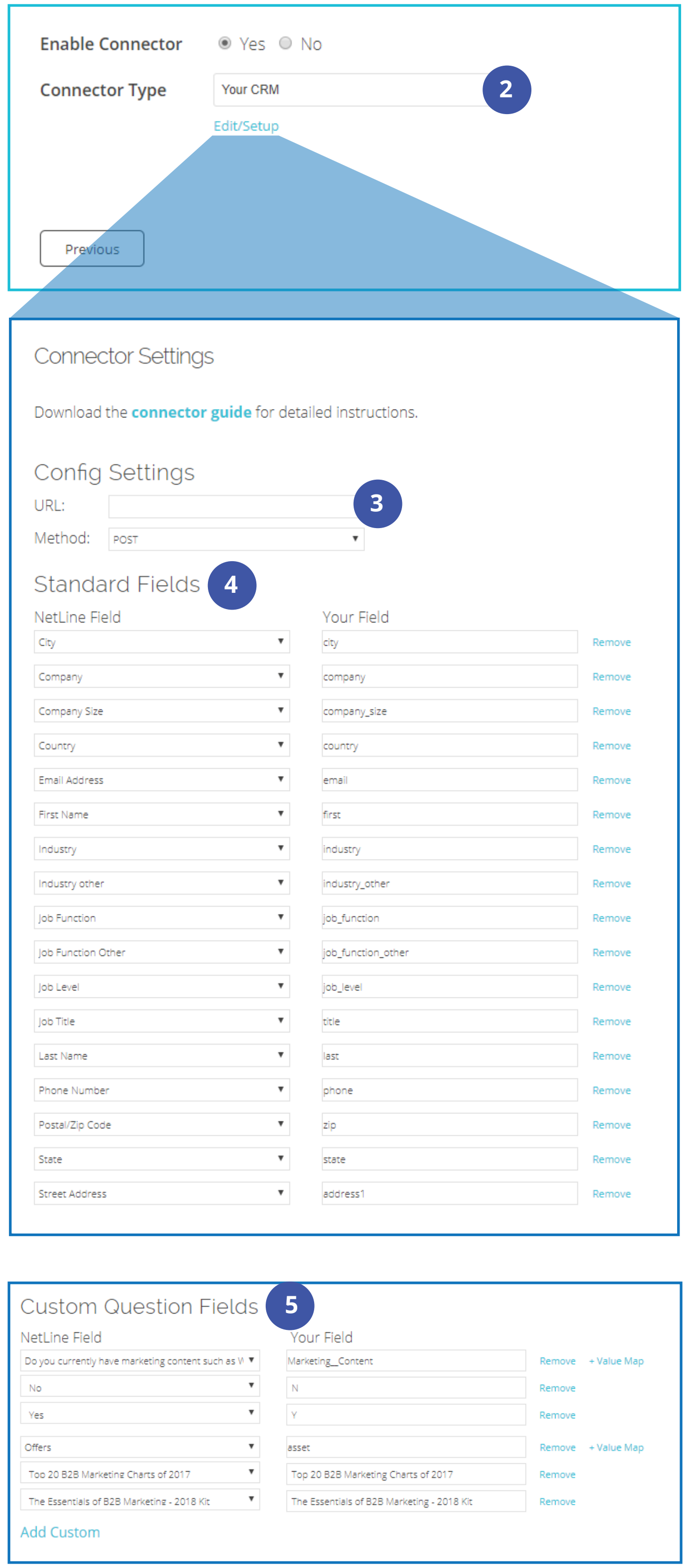
Once you've received approval, you will have to sign back into your account to continue setting up your connector. This can be done in two different ways:

1. Campaign level
2. Account level

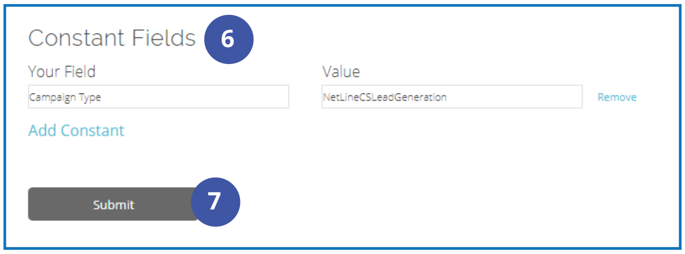
All LeadFlow campaigns will leverage the connector settings established at the account level, unless connectors are set up at the individual campaign level.

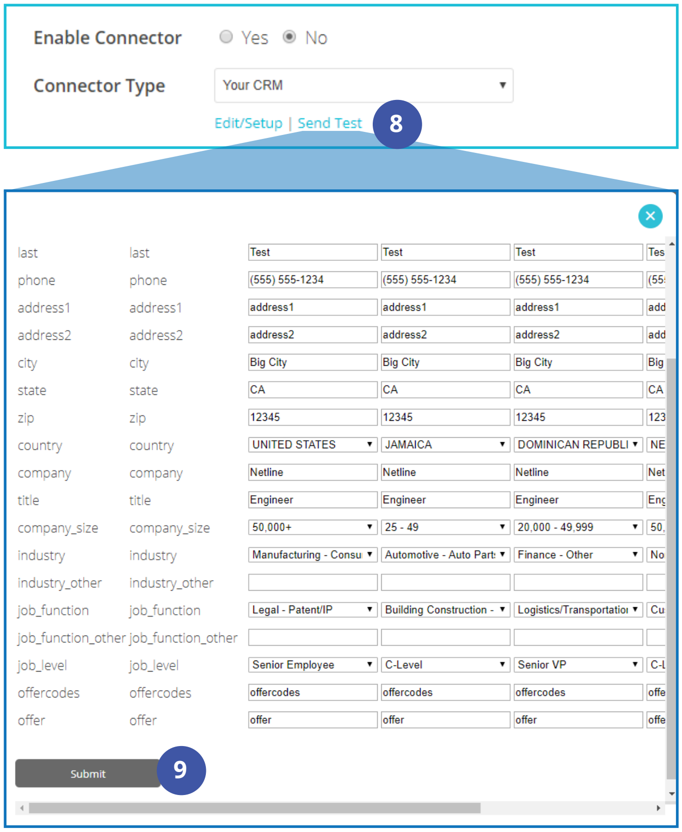
METHOD 1: CAMPAIGN LEVEL

1. After receiving approval, make sure you have logged out and back in before resuming step 9 of campaign creation. You will now see 'Connector Type'.
2. Select from the 'Connector Type', 'Your CRM'. Then, click on 'Edit/Setup'. For Hubspot and On24 users, see section 'Mapping Fields' in this doc.
3. In the 'Post URL' field, enter the URL provided to you by your MAP or CRM solution—you will have to be logged in to retrieve this URL.
4. 'Standard Fields' consists of fields (listed on the left) that are ready to be mapped with your desired values to your respective MAP/ CRM fields (listed on the right). See 'Mapping Fields' for more details.
5. 'Custom Questions Fields' will allow you to also map custom values, including your offer(s).



6. 'Constant Fields' allow you to append additional fields where the value remains the same for each record posted. This can be helpful should you choose to identify NetLine's leads generated by other sources.
7. Complete the mapping process by clicking 'Submit'.
8. To ensure that you've mapped your fields appropriately, click on 'Send Test.'
9. Click 'Submit' to send test leads into your CRM
10. Return to your MAP/CRM and search for the test records. The easiest method is to search by email address.
11. Once you've identified the test records, you can return to the NetLine Portal, and select "Yes" to release the connector.





METHOD 2: ACCOUNT LEVEL

1. After receiving approval, make sure you have logged out and back in before resuming step 9. You will now see 'Connector Type'.
2. Go to 'Account', then click on the 'Connectors' tab.
3. Click on 'Edit/Setup' to begin the connection process.
4. Follow the setup steps listed in Method 1, 3 - 7.