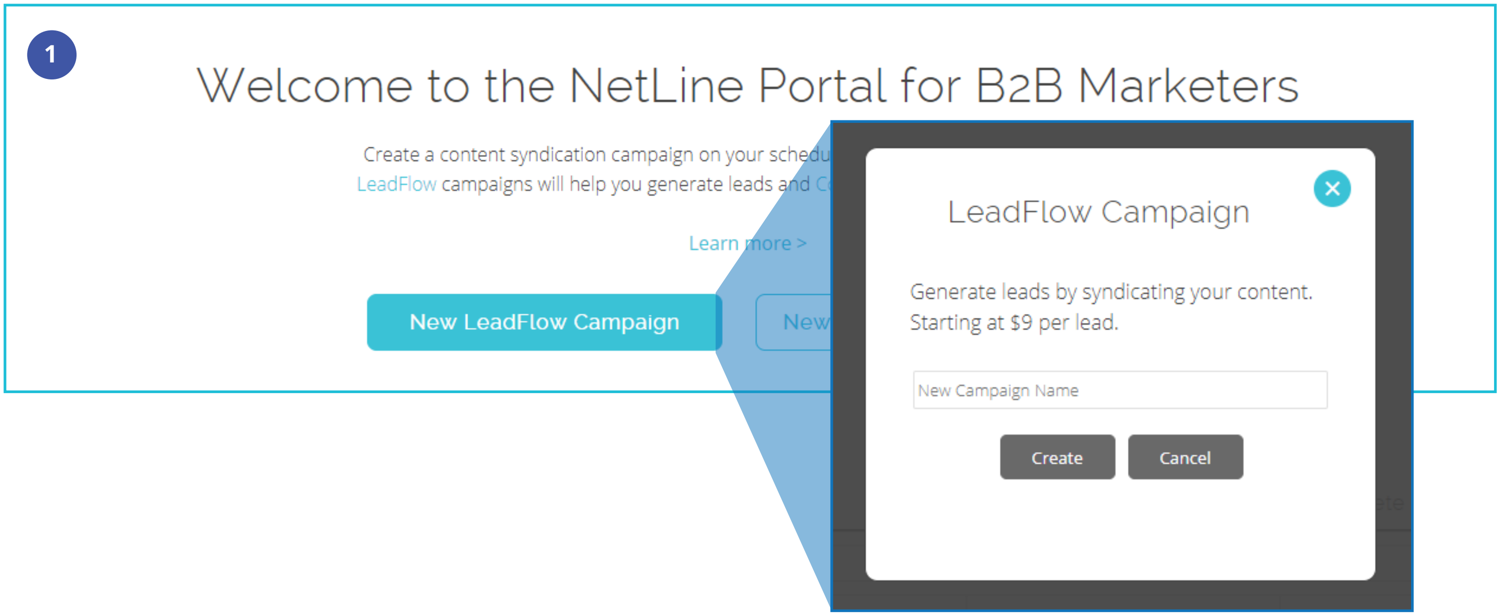
NetLine CORPORATION

GUIDE

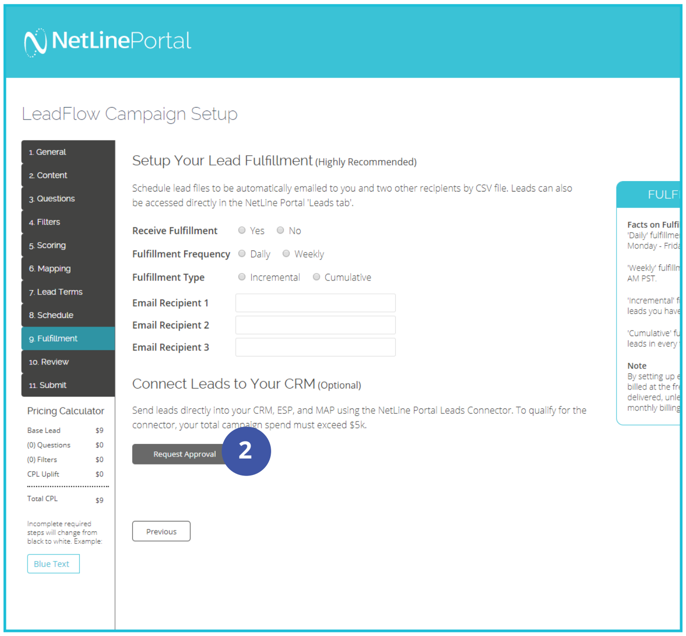
Engage with your leads faster with NetLine's Connectors.

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.



For additional questions, contact Portal Support:
Portal-Support@netline.com.

Successful B2B Marketers Start Here.

Choose A Method

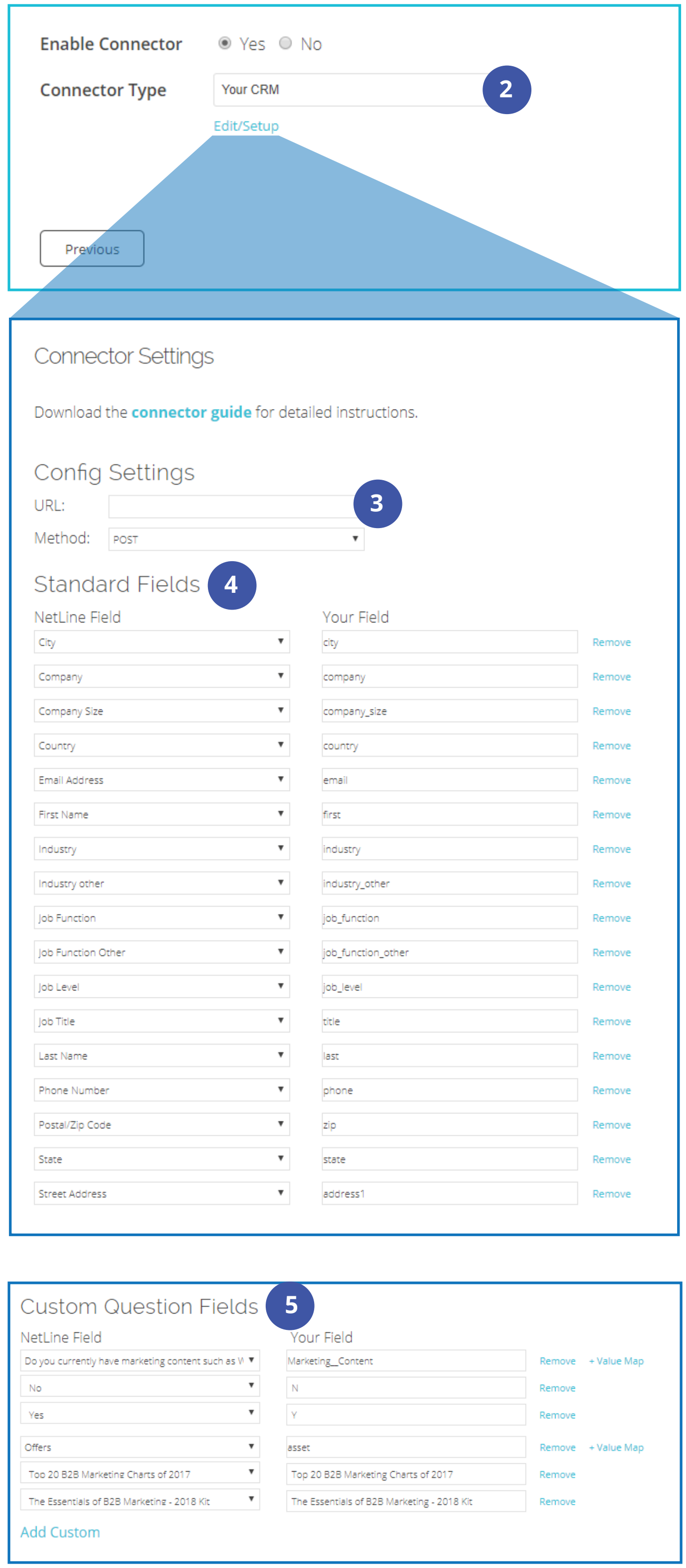
Once you've received approval, you will have to sign back into your account to continue setting up your connector. This can be done in two different ways:

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, On24, and Marketo 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).



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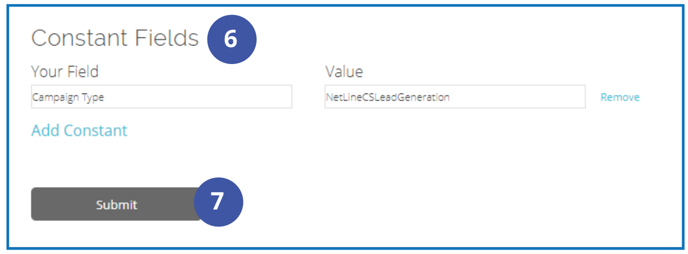
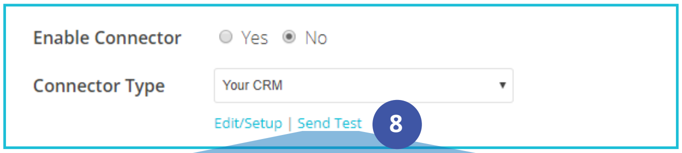
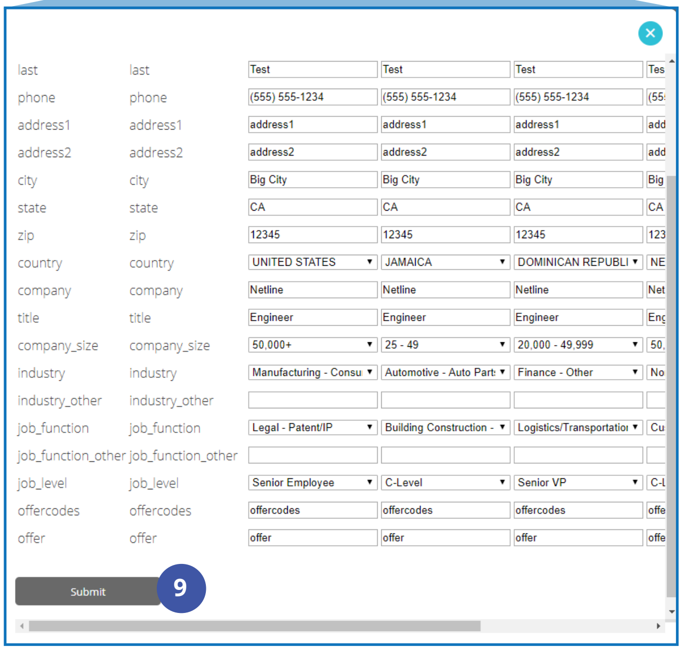
6. ‘Constant Fields’ allow you to append additional fields where the value remains the same for each record posted. This can be helpful should you choose to identify NetLine’s leads generated by other sources.
7. Complete the mapping process by clicking ‘Submit’.
8. To ensure that you’ve mapped your 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.

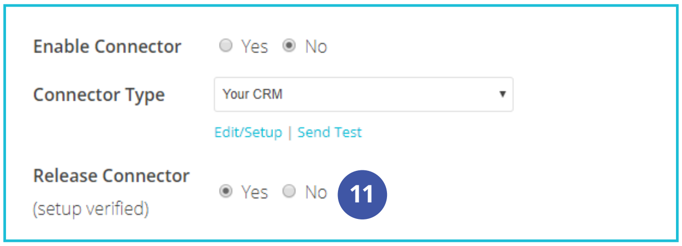


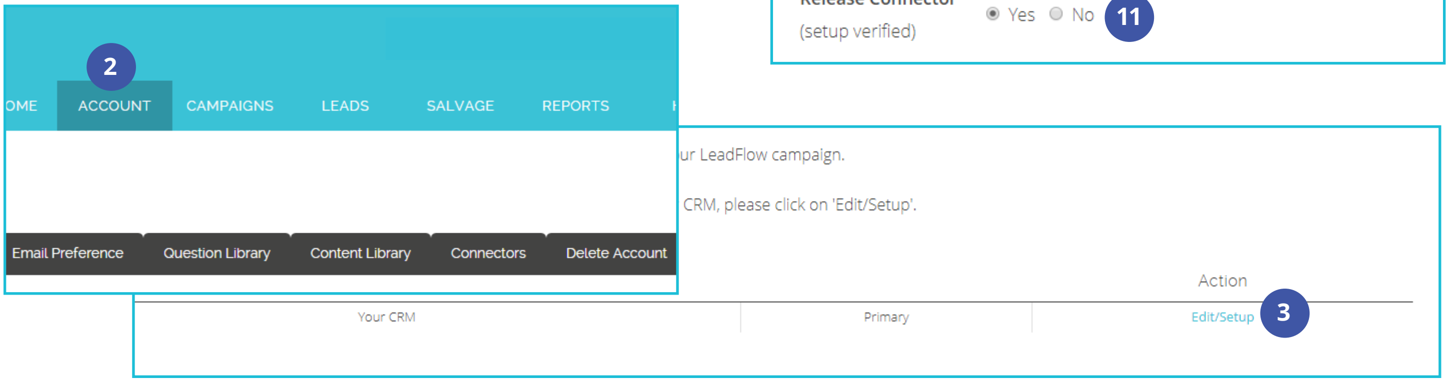




METHOD 2: ACCOUNT LEVEL

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.





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How to Connect the NetLine Portal to Eloqua

1. CREATE A FORM IN ELOQUA

1. Navigate to **Assets**, then click **Forms**.
2. Click **Create a Form**
3. Choose either Blank Formor an existing form template.
4. Click **Actions**, then **Settings** to open the form settings window.
5. **Configure the settings** of the form:
    - Name: Name the form something descriptive
    - Leave the rest of the settings as they are
    - Click **done** when you are finished

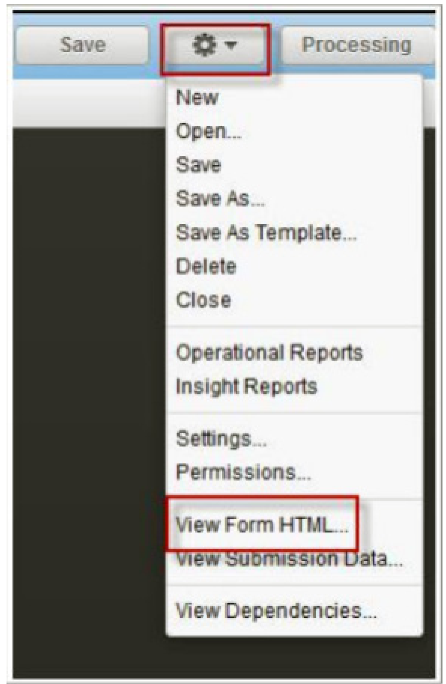
6. **Add Fields** to the form by clicking the icon on the left panel to open the **Field Chooser**

7. Double click the fields you want to add or drag and drop them onto your form

8. Configure the form processing to your preference

9. Click **Save**

2



Note: After you create a form and configured form processing, you can use the form in a campaign. The status of your form mirrors the status of the campaign. For example, if the campaign is in Draft state, the form is in Draft state. If the campaign is Active, the form is also Active.

2. LOCATE THE FORM HTML

1. Navigate to and select your created form

2. Click the **gear icon** in the upper right then click **View Form HTML**

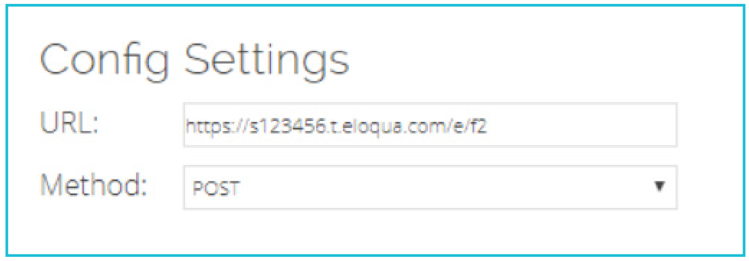
3. Copy/Paste the HTML into a document for easy access for Portal Setup

SAMPLE HTML

```
</p></div></td><input name=”C_EmailAddress” id=”C_EmailAddress” class=”elqField” onblur=”” value=”” onfocus=”” size=”40” style=”width:275px;” type=”text”>

</p></div></td><input name=”C_FirstName” id=”C_ FirstName” class=”elqField” onblur=”” value=”” onfocus=”” size=”40” style=”width:275px;” type=”text”>

</p></div></td><input name=”C_LastName” id=”C_LastName” class=”elqField” onblur=”” value=”” onfocus=”” size=”40” style=”width:275px;” type=”text”>

</p></div></td><input name=”C_Title” id=”C_Title” class=”elqField” onblur=”” value=”” onfocus=”” size=”40” style=”width:275px;” type=”text”>
```

3. DETERMINE THE POST URL

1. Eloqua POST URL standard format is: **https://s[elqSiteID HERE].t.eloqua.com/e/f2**
2. Locate the elqSiteID in Eloqua by:
3. Navigate to your Form
4. Click **Form Details**
5. Click **Integration Details**
6. Plug in the **elqSiteID** (ex: 123456) to get the full URL
7. POST URL = https://s123456.t.eloqua.com/e/f2
8. Paste the POST URL into the Portal setup screen where indicated
9. Choose POST for the method



4. STANDARD FIELDS SECTON

1. The Standard section consists of the the standard information that we collect on the leads (First Name, Last Name, Email, Company, Title, Address, Phone, etc.)

2. Please note that if any of your fields have picklists, you will need to setup mapping to those picklists in step 6 (mapping), prior to sending tests. Common ones are country, industry, and company size.

3. Edit the standard section so it only displays the fields that are on your Eloqua form.

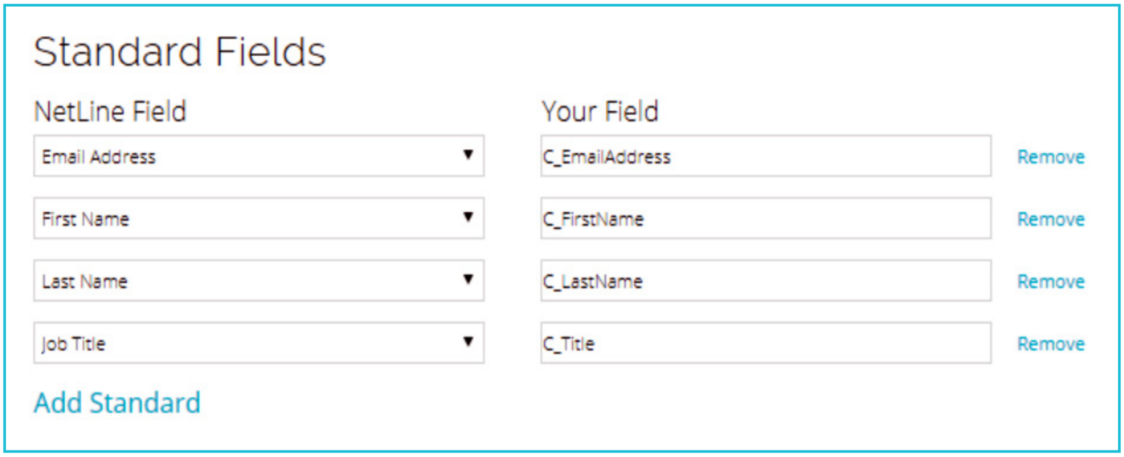
4. Now we will use the Form HTML to get the field names and paste them into the Portal.

5. The example below is what setup would look like for a Eloqua form that has Email, First Name, Last Name, and Title as standard fields on their form.

SAMPLE HTML

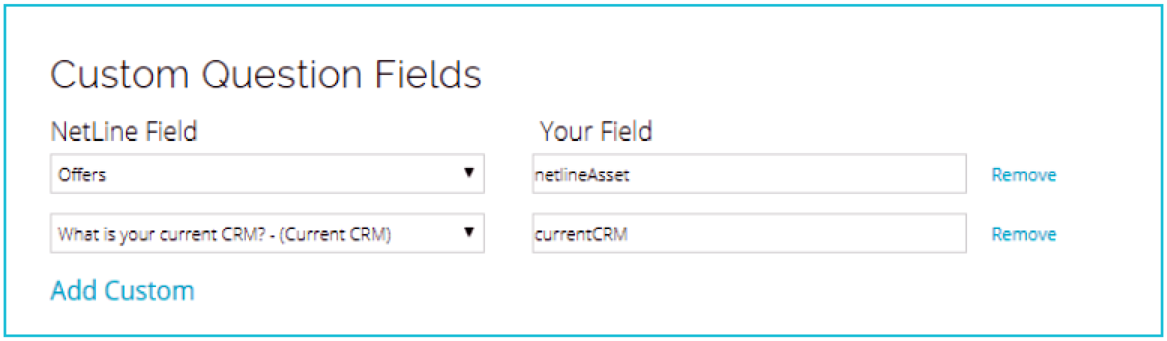
```
</p></div></td><input name=”C_EmailAddress” id=”C_EmailAddress” class=”elqField” onblur=”” value=”” onfocus=”” size=”40” style=”width:275px;” type=”text”>

</p></div></td><input name=”C_FirstName” id=”C_ FirstName” class=”elqField” onblur=”” value=”” onfocus=”” size=”40” style=”width:275px;” type=”text”>

</p></div></td><input name=”C_LastName” id=”C_LastName” class=”elqField” onblur=”” value=”” onfocus=”” size=”40” style=”width:275px;” type=”text”>

</p></div></td><input name=”C_Title” id=”C_Title” class=”elqField” onblur=”” value=”” onfocus=”” size=”40” style=”width:275px;” type=”text”>
```

TRANSLATES INTO...



5. CUSTOM QUESTIONS

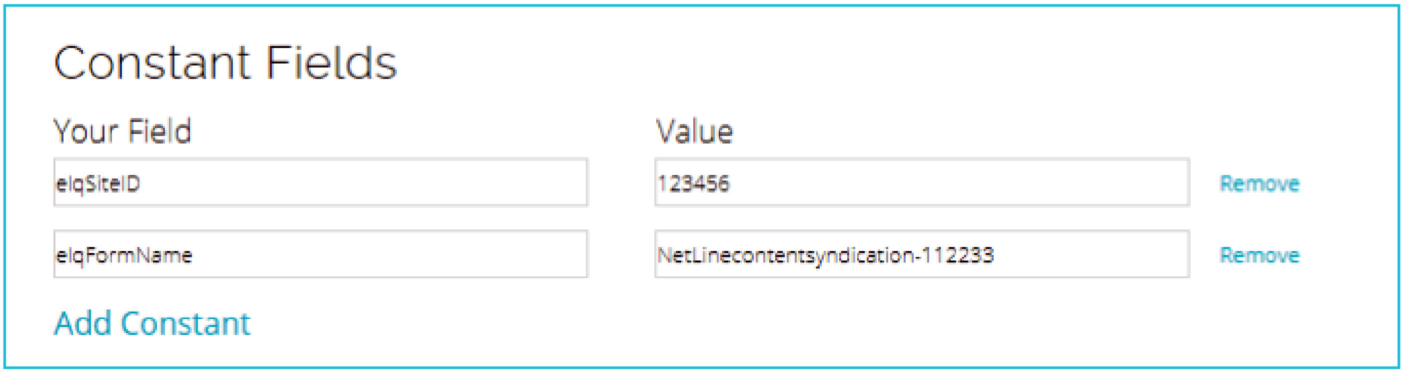
- The Custom Question section consists of any custom questions you have on your campaign, as well as the offer names for your content. These can only be sent through if they are on your Eloqua form.
- In the below example, we are sending the asset and the custom question. Again, use the form HTML to determine the field names on the right side.



6. CONSTANT FIELDS

1. "Hidden Fields" consists of any fields you have on your form that have not been covered in the Standard/Custom sections. Common hidden fields are UTM parameters and lead source. Eloqua also has their own required hidden fields.
2. Navigate to the **Form Details** page of your Eloqua form
3. Click **Integration Details**
4. Retrieve the following field names and corresponding values
   - **elqSiteID** (ex:123456)
   - **elqFormName** (ex: NetLinecontentsyndication-112233)
5. Add these fields and values to the constant section of the Portal

TRANSLATES INTO...



7. SEND TESTS & RELEASE CONNECTOR

1. Once you have all of the sections setup, click **submit** to close out of the setup
2. From the portal screen, click on **Send Tests** in order to to send tests to confirm setup.
3. Check Eloqua to make sure the tests made it in.
4. Once verified, switch **"Enable Connector"** to "Yes" and **"Release Connector"** to "Yes"
5. Click **Next** to advance to the next step to save the connector. You do not need to submit your campaign.

Next section: Troubleshooting

Troubleshooting Failed Tests

There are a few common reasons that test connections fail. Try troubleshooting with these tips and if you're still having trouble, contact **portal-support@netline.com** for help.

NOT MAPPING PICKLIST VALUES

Some fields often have picklists of values that should be used instead of being able to send a free text value. Common values are country, company size, and industry. If you have a picklist of values for anything in the Standard Section, please go to step 6 of the campaign setup (mapping) and update the values.

You may also have a picklist of values for your custom question answers or for your assets. If this is the case, on the connector setup, click on **"+Value Map"** next to the offer or custom question field, choose your answers/offers, and type in the picklist values on the right.

MISSING HIDDEN FIELDS

Any required hidden fields must be added to the Constant section. Common hidden parameters include, Lead Source, UTM Parameters and Campaign ID's.

CAPITALIZATION ERRORS

All fields are case sensitive, and one wrong capital or lowercase letter will prevent a successful test. Make sure that the fields are an exact match exactly the API names in your Form HTML (i.e. Email vs. email). Make sure your hidden fields are as follows:

- **elqSiteID**
- **elqFormName**

STANDARD AND CUSTOM FIELD MISMATCHES

Although there are a lot of values available to be sent on the connector setup page, we can only send values that are on the Eloqua form you created.

For example, if you get to the setup and decide you want to send "Industry", but your Eloqua form does not have an industry field, your tests will not go through. You will need to go back to your form to ***add*** the field in Eloqua.

Similarly, if you have a field on your Eloqua form that you ***did not*** add to the connector setup, it also will not work.