

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.

1

Welcome to the NetLine Portal for B2B Marketers

Create a content syndication campaign on your schedule. LeadFlow campaigns will help you generate leads and C...

[Learn more >](#)

New LeadFlow Campaign

New

×

LeadFlow Campaign

Generate leads by syndicating your content. Starting at \$9 per lead.

Create

Cancel

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.

NetLinePortal

LeadFlow Campaign Setup

1 General
 2 Content
 3 Questions
 4 Filters
 5 Scoring
 6 Mapping
 7 Lead Terms
 8 Schedule
9 Fulfillment
 10 Review
 11 Submit

Setup Your Lead Fulfillment (Highly Recommended)

Schedule lead files to be automatically emailed to you and two other recipients by CSV file. Leads can also be accessed directly in the NetLine Portal 'Leads' tab.

Receive Fulfillment Yes No

Fulfillment Frequency Daily Weekly

Fulfillment Type Incremental Cumulative

Email Recipient 1

Email Recipient 2

Email Recipient 3

Connect Leads to Your CRM (Optional)

Send leads directly into your CRM, ESP, and MAP using the NetLine Portal Leads Connector. To qualify for the connector, your total campaign spend must exceed \$5k.

Request Approval 2

Previous

FULF
Facts on Fulfillment:
 Daily Fulfillment: Monday - Friday
 Weekly Fulfillment: All PST
 Incremental Fulfillment: Leads you have
 Cumulative Fulfillment: Leads in every

Pricing Calculator

Base Lead	\$9
(3) Questions	\$0
(3) Filters	\$0
CPL Uplift	\$0
Total CPL	\$9

Incomplete required steps will change from black to white. Example: [Blue Text](#)

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

Successful B2B Marketers Start Here.
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Choose A Method

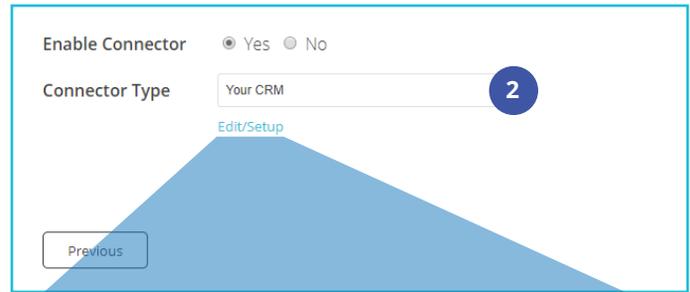
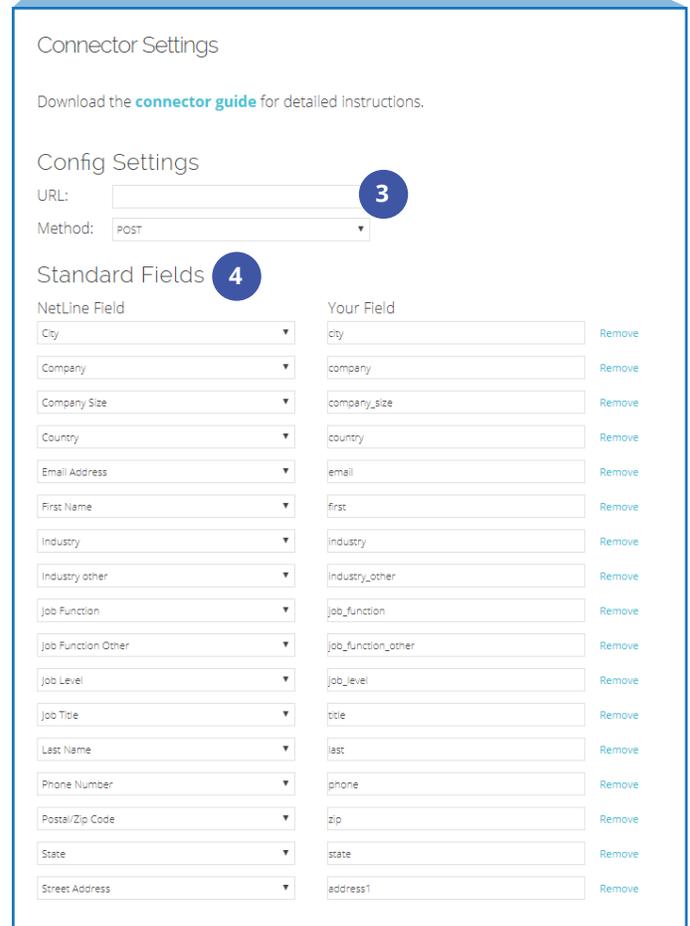
Once you've received approval, you will have to sign back into your account to continue setting up your connector. This can be done in two different ways:

1. Campaign level
2. Account level

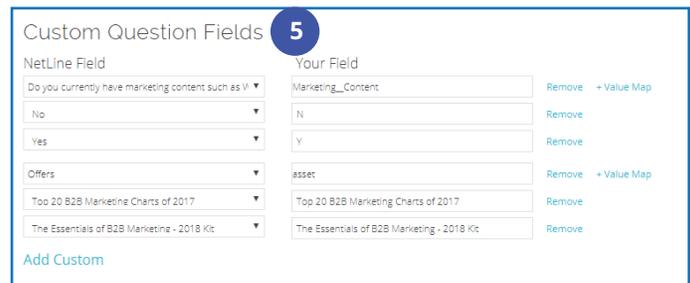
All LeadFlow campaigns will leverage the connector settings established at the account level, unless connectors are set up at the individual campaign level.

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).

NetLine Field	Your Field	
City	city	Remove
Company	company	Remove
Company Size	company_size	Remove
Country	country	Remove
Email Address	email	Remove
First Name	first	Remove
Industry	industry	Remove
Industry other	industry_other	Remove
Job Function	job_function	Remove
Job Function Other	job_function_other	Remove
Job Level	job_level	Remove
Job Title	title	Remove
Last Name	last	Remove
Phone Number	phone	Remove
Postal/Zip Code	zip	Remove
State	state	Remove
Street Address	address1	Remove



NetLine Field	Your Field	
Do you currently have marketing content such as V	Marketing_Content	Remove + Value Map
No	N	Remove
Yes	Y	Remove
Offers	asset	Remove + Value Map
Top 20 B2B Marketing Charts of 2017	Top 20 B2B Marketing Charts of 2017	Remove
The Essentials of B2B Marketing - 2018 Kit	The Essentials of B2B Marketing - 2018 Kit	Remove

[Add Custom](#)

- '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.
- Complete the mapping process by clicking 'Submit'.
- To ensure that you've mapped your fields appropriately, click on 'Send Test.'
- Click 'Submit' to send test leads into your CRM
- Return to your MAP/CRM and search for the test records. The easiest method is to search by email address.
- Once you've identified the test records, you can return to the NetLine Portal, and select "Yes" to release the connector.

Constant Fields 6

Your Field: Campaign Type Value: NetLineCSLeadGeneration [Remove](#)

[Add Constant](#)

Submit 7

Enable Connector Yes No

Connector Type Your CRM [Edit/Setup](#) | [Send Test](#) 8

last	last	Test	Test	Test	Test
phone	phone	(555) 555-1234	(555) 555-1234	(555) 555-1234	(555) 555-1234
address1	address1	address1	address1	address1	address1
address2	address2	address2	address2	address2	address2
city	city	Big City	Big City	Big City	Big City
state	state	CA	CA	CA	CA
zip	zip	12345	12345	12345	12345
country	country	UNITED STATES	JAMAICA	DOMINICAN REPUBLIC	NETLINE
company	company	Netline	Netline	Netline	Netline
title	title	Engineer	Engineer	Engineer	Engineer
company_size	company_size	50,000+	25 - 49	20,000 - 49,999	50,000+
industry	industry	Manufacturing - Consu	Automotive - Auto Part	Finance - Other	Manufacturing - Consu
industry_other	industry_other				
job_function	job_function	Legal - Patent/IP	Building Construction -	Logistics/Transportation	Legal - Patent/IP
job_function_other	job_function_other				
job_level	job_level	Senior Employee	C-Level	Senior VP	Senior Employee
offer_codes	offer_codes	offer_codes	offer_codes	offer_codes	offer_codes
offer	offer	offer	offer	offer	offer

Submit 9

Enable Connector Yes No

Connector Type Your CRM [Edit/Setup](#) | [Send Test](#)

Release Connector (setup verified) Yes No 11

METHOD 2: ACCOUNT LEVEL

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

2

HOME ACCOUNT CAMPAIGNS LEADS SALVAGE REPORTS

Email Preference Question Library Content Library Connectors Delete Account

Your LeadFlow campaign.

Your CRM, please click on 'Edit/Setup'.

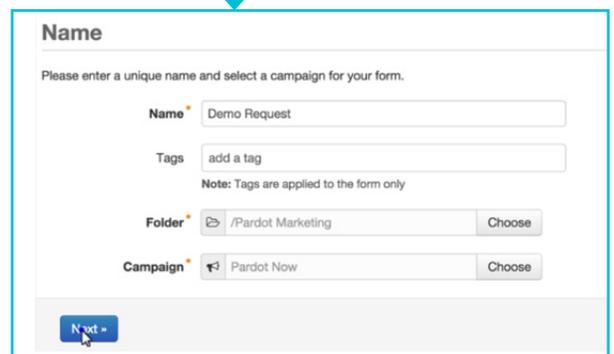
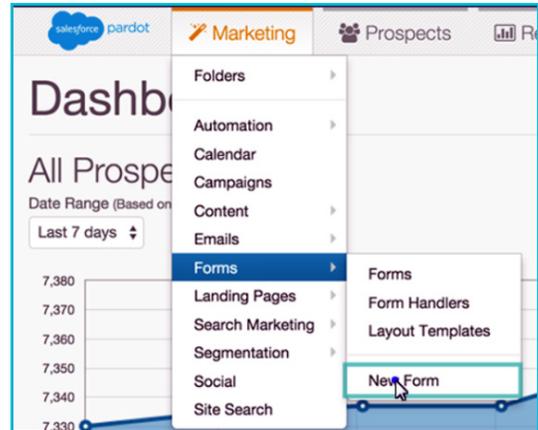
Your CRM	Primary	Action Edit/Setup 3
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How to Connect the NetLine Portal to Pardot

1. CREATE A FORM IN PARDOT

1. To create a new form, select **Marketing**
2. Hover over **Forms** and select **New Form**
3. Name the form
4. Add the form to a folder
5. Add the form to a campaign
6. When all of the information has been added, select **Next**
7. Next, add fields to the form, which will contain: First Name, Last Name, Company, and Email by default. to add more fields, click on **+ Add New Field**
8. Once you've added your fields, click **Next** to go to the next step.
9. Now, style the look and feel of the form by choosing a layout template. Select **Choose** and then select **Standard Form** from the list.
10. You do not need to configure any other design settings since it will not be visible to users. Do not check any "Advanced" settings.
11. Click **Next** to continue.
12. You do not need to add anything to the "Completion Actions" of the form. Click **Next** to advance to the next step and form preview. Review all sections of your form. If everything looks okay, click **Confirm & Save**

1 - 5

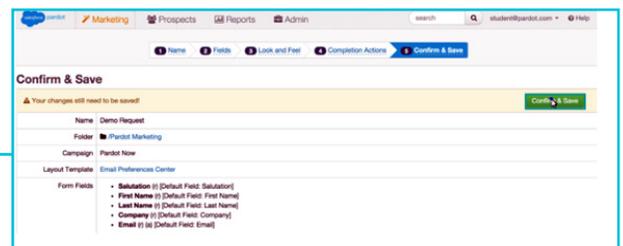
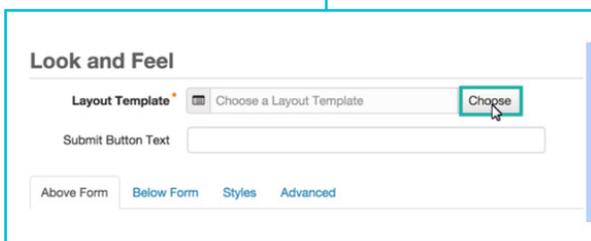


7



12

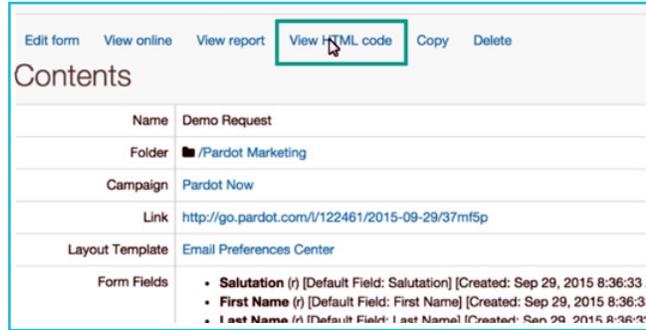
9



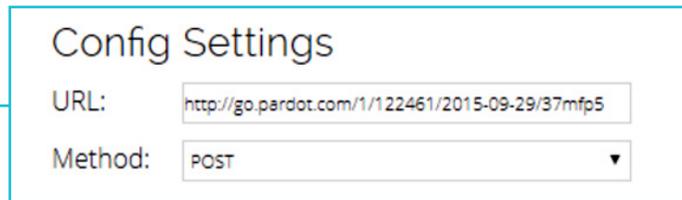
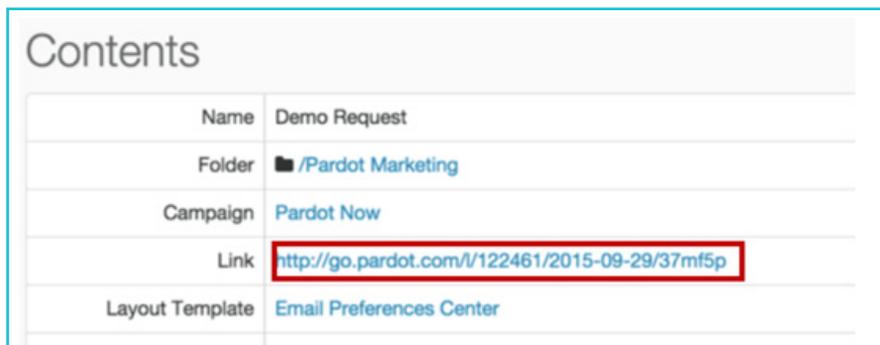
2. DETERMINE THE POST URL

Navigate to, and select, your newly created form. Click **View HTML code** to get your form code. Then, copy and paste the HTML code into a document for easy access during Portal setup.

When viewing your form HTML, scroll down to the Contents section.

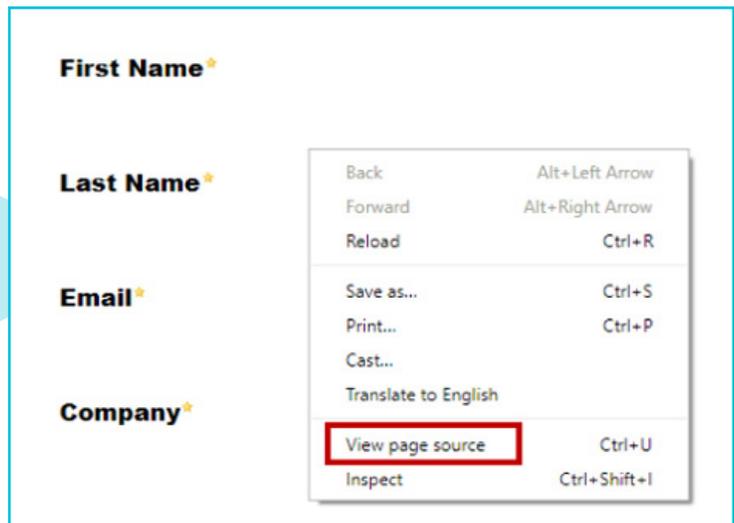


From there, copy the link provided, and paste it into the POST URL field for the Portal.



3. VIEW YOUR FORM PAGE SOURCE

Open your form link with a browser and right click on the page to **View Page Source**. This will open your full html code for the page, which is used to set up the connector to the Portal.



4. STANDARD SECTION

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

1. Edit the standard section so it only displays the fields that are on your Pardot form.
2. Now we will use the HTML Code to get the field names and paste them into the Portal. Use what is displayed after "name =" in your HTML Code to put in "your field" section of the Portal setup.

```
<p class="form-field first_name pd-text required " >
  <label class="field-label" for="First_Namepi_First_Name">First Name</label>

  <input type="text" name="First_Namepi_First_Name" id="First_Namepi_First_Name" value="" class="text" size="30" maxlength="40" onchange="" />
</p>
<div id="error_for_First_Namepi_First_Name" style="display:none"></div>

<p class="form-field last_name pd-text required " >
  <label class="field-label" for="Last_Namepi_Last_Name">Last Name</label>

  <input type="text" name="Last_Namepi_Last_Name" id="Last_Namepi_Last_Name" value="" class="text" size="30" maxlength="80" onchange="" />
</p>
<div id="error_for_Last_Namepi_Last_Name" style="display:none"></div>
```

The example below is what setup would look like for a Pardot form that has Email, First Name, Last Name, and Company as standard fields on their form, using our sample HTML Code.

Standard Fields

NetLine Field

Email Address	▼
First Name	▼
Last Name	▼
Company	▼

Your Field

Emailpi_Email	Remove
First_Namepi_First_Name	Remove
Last_Namepi_Last_Name	Remove
Companypi_Company	Remove

Add Standard

5. CUSTOM QUESTIONS FIELDS SECTION

The Custom Questions 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 Pardot form.**

In the below example, we are sending the asset and the custom question. Again, use the HTML code to determine the field names on the right side.

If you do not have these on your Pardot form, remove them from the connector setup screen.

Custom Question Fields

NetLine Field	Your Field	
<input type="text" value="Offers"/>	<input type="text" value="299891_475pi_299891_466"/>	Remove
<input type="text" value="What is your CRM? - (CRM)"/>	<input type="text" value="299891_475pi_299891_468"/>	Remove

[Add Custom](#)

6. HIDDEN FIELDS SECTION

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. Pardot also has their own required hidden field.

- Field = _utf8
- Value = ☃

Setup on the Portal looks like this:

Constant Fields

Your Field	Value	
<input type="text" value="_utf8"/>	<input type="text" value="&#9731"/>	Remove

[Add Constant](#)

7. SEND TESTS

1. Once all sections are completed, click **Submit** to close out of the setup.
2. From the Portal screen, click **“Send Tests”** to confirm proper setup.
3. Check Pardot to ensure tests made through.

8. RELEASE CONNECTOR

1. Once verified, switch, **“Enable Connector”** to “Yes” and **“Release Connector”** to “Yes”
2. Click “Next” to advance to the next step to save the connector. You do not need to submit your campaign.

>> [NEXT: 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 ones 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 will prevent tests from going through. Make sure that the fields match exactly the API names from the HTML Code (ie: Email vs. email)

Make sure your hidden field is as follows:

- `_utf8 = ☃`

REUSING API REFERENCE NUMBERS FROM ANOTHER FORM

Pardot API field names are custom for each form and there is no standard list.

Do not copy an API value from a previous form. Instead, make sure to use the values from this form only.

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 Pardot form you created.

For example, if you get to the setup and decide you want to send "Industry", but your Pardot 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 Pardot.

In contrast, if you have a field on your Pardot form that you forget to add to the connector setup, it also will not work.