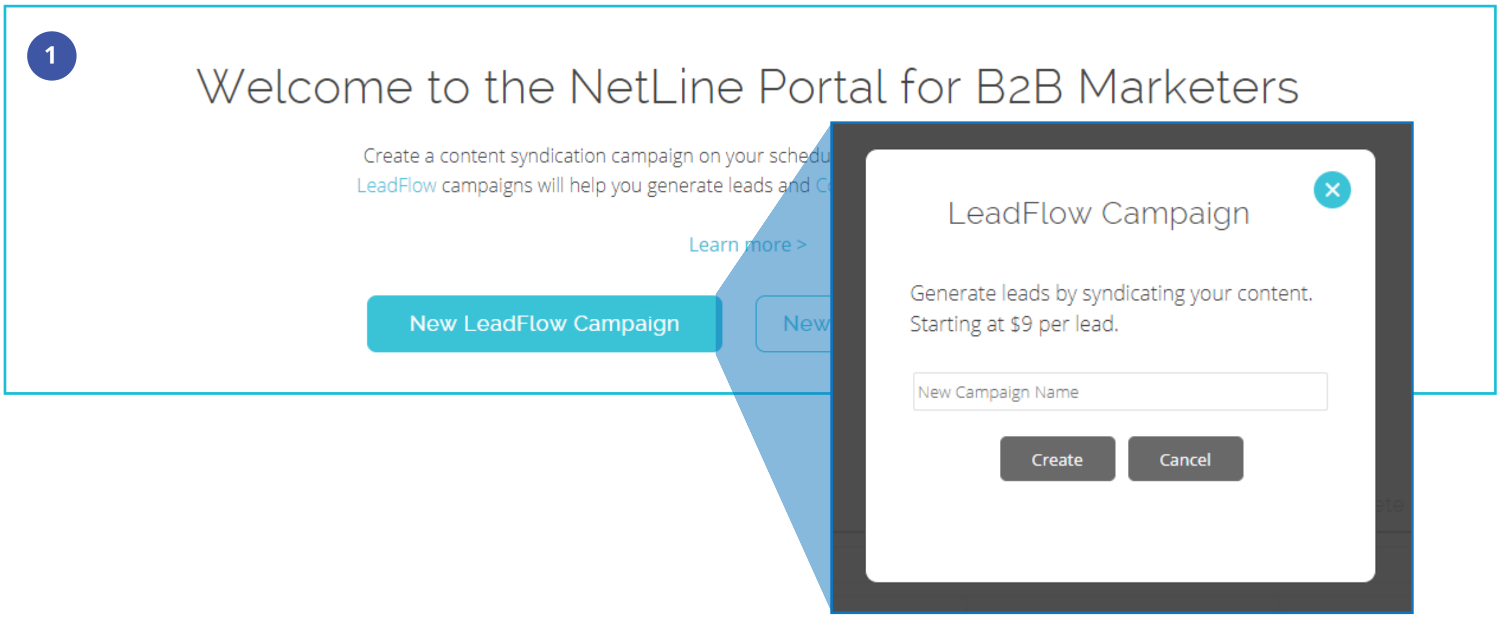
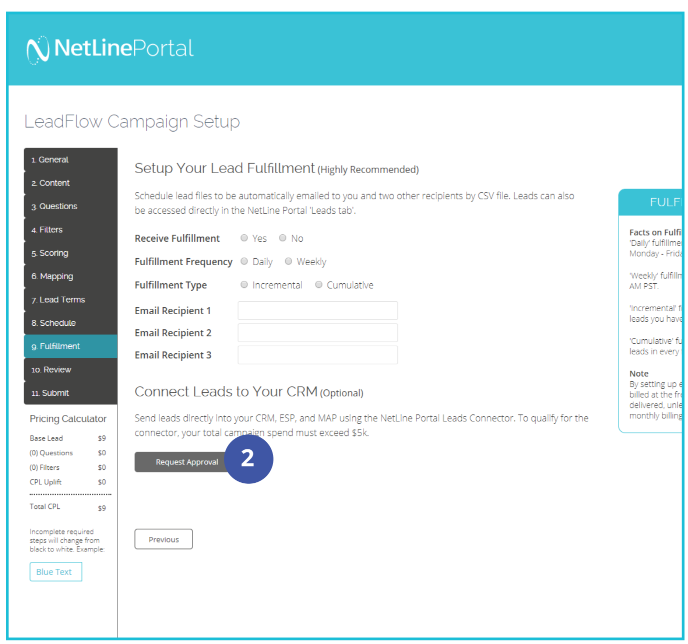
Engage with your leads faster with NetLine's Connectors.

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

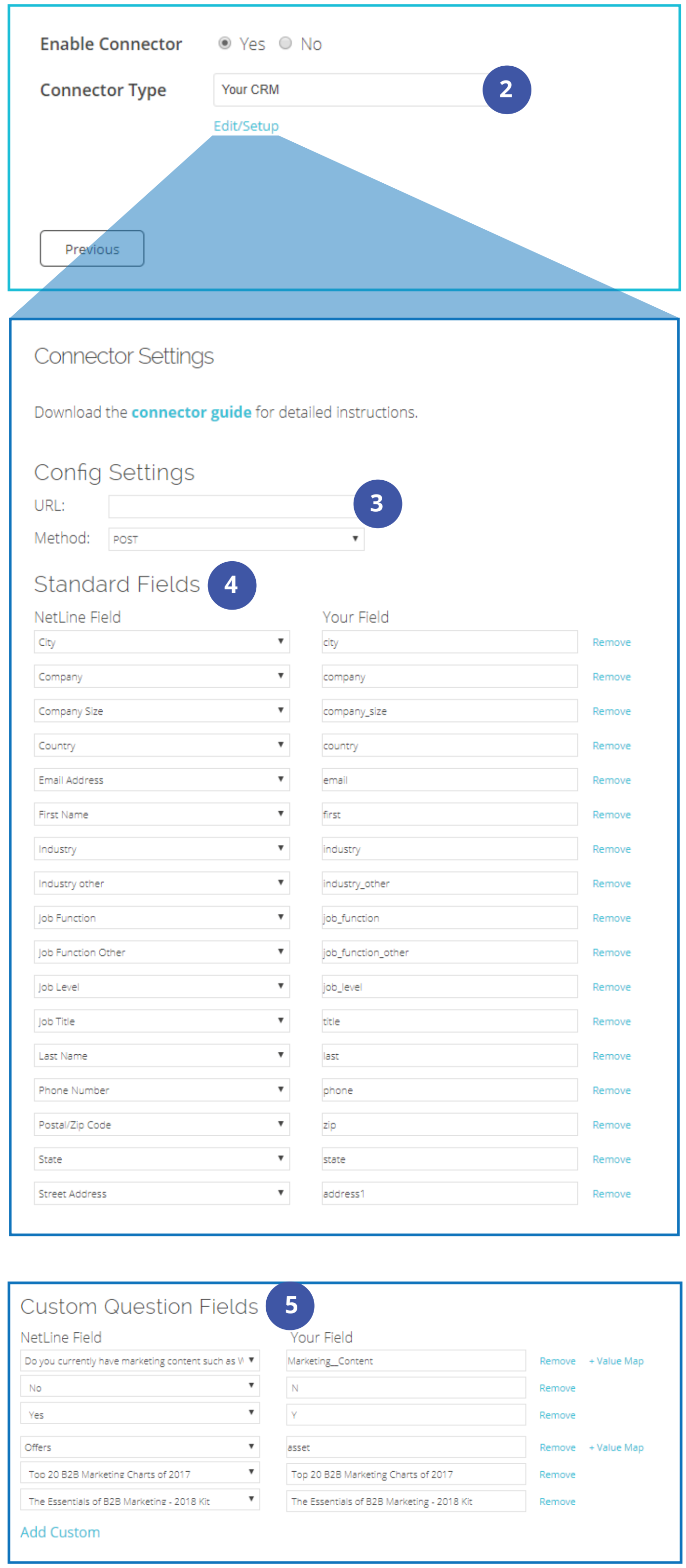
Once you've received approval, you will have to sign back into your account to continue setting up your connector. This can be done in two different ways:

1. Campaign level
2. Account level

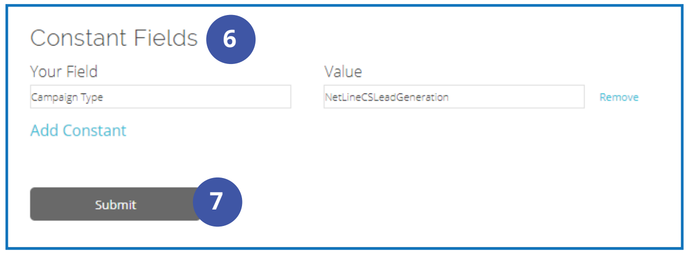
All LeadFlow campaigns will leverage the connector settings established at the account level, unless connectors are set up at the individual campaign level.

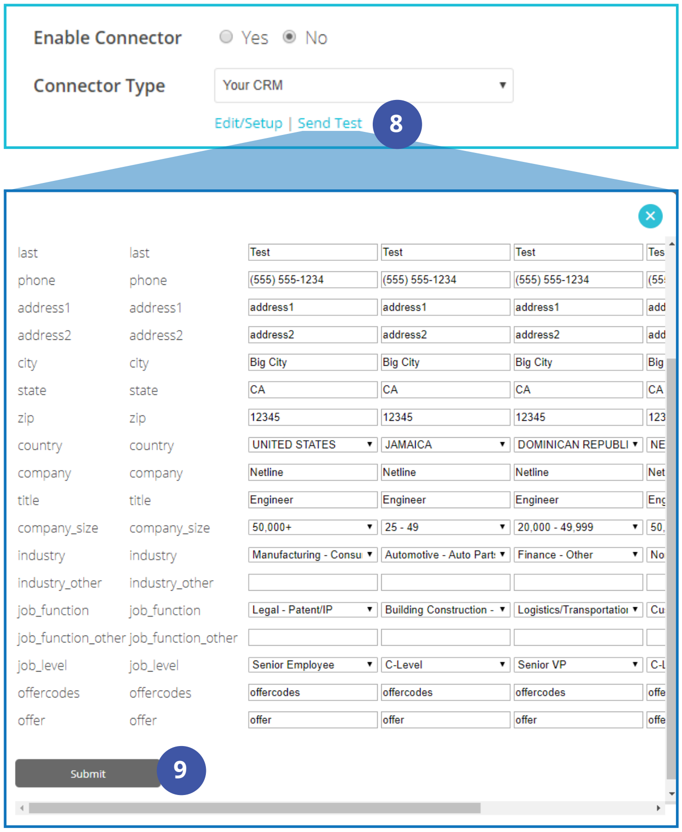
METHOD 1: CAMPAIGN LEVEL

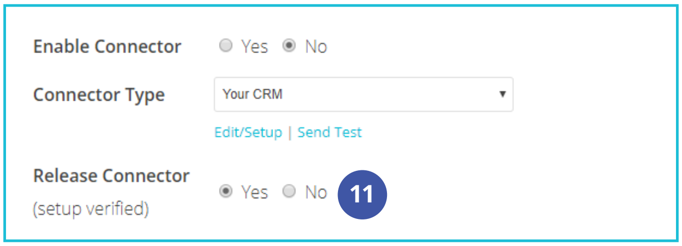
1. After receiving approval, make sure you have logged out and back in before resuming step 9 of campaign creation. You will now see 'Connector Type'.
2. Select from the 'Connector Type', 'Your CRM'. Then, click on 'Edit/Setup'. For Hubspot, On24, and Marketo users, see section 'Mapping Fields' in this 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).



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.

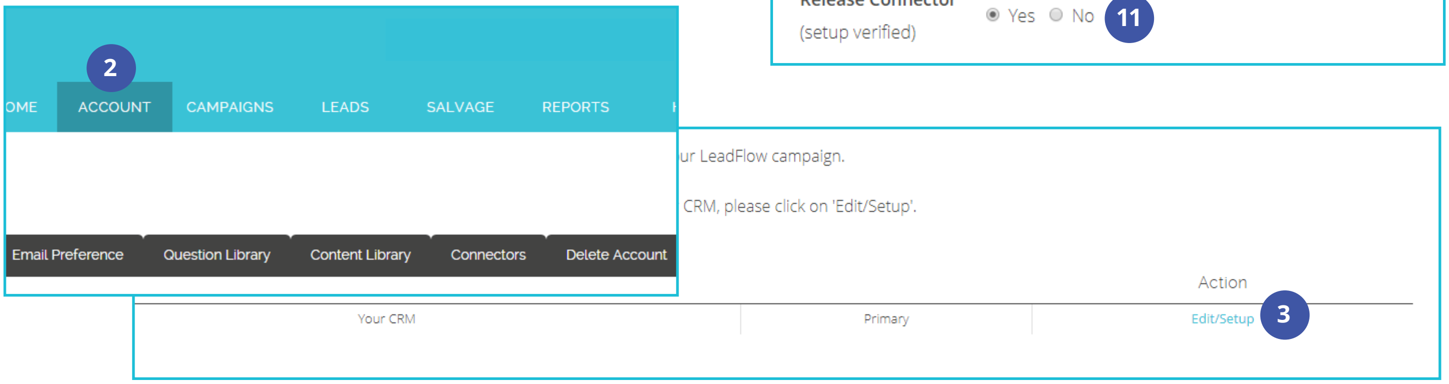






METHOD 2: ACCOUNT LEVEL

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.



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.

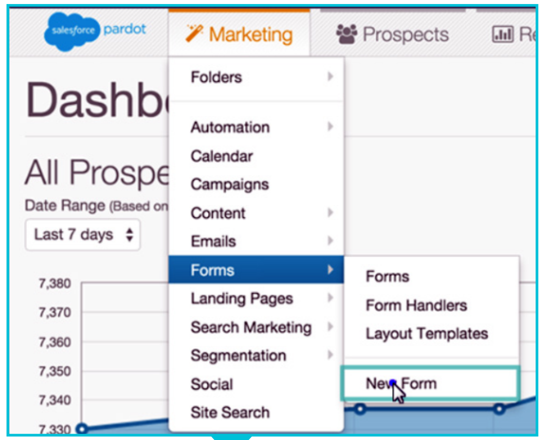
9. Now, style the look and feel of the form by choosing a layout template. Select **Choose** and then select **Standard Form** from the list.

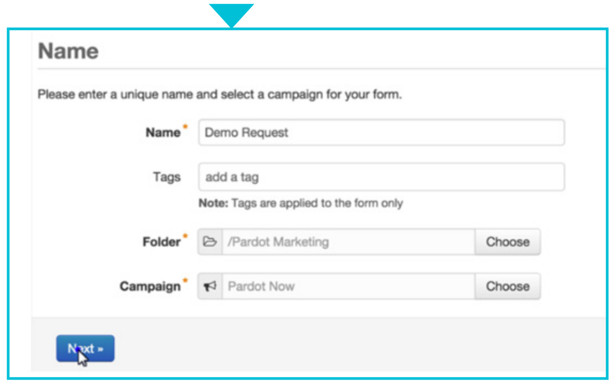
10. You do not need to configure any other design settings since it will not be visible to users. Do not check any "Advanced" settings.

11. Click **Next** to continue.

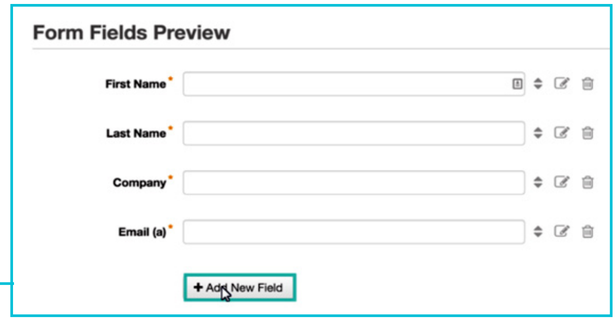
12. You do not need to add anything to the "Completion Actions" of the form. Click **Next** to advance to the next step and form preview. Review all sections of your form. If everything looks okay, click **Confirm & Save**

1 - 5

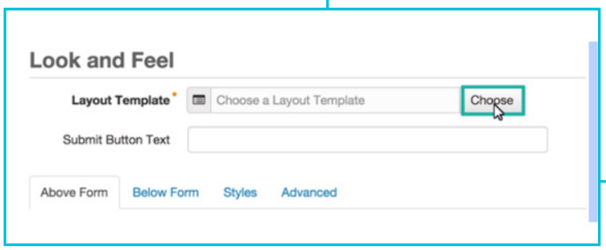




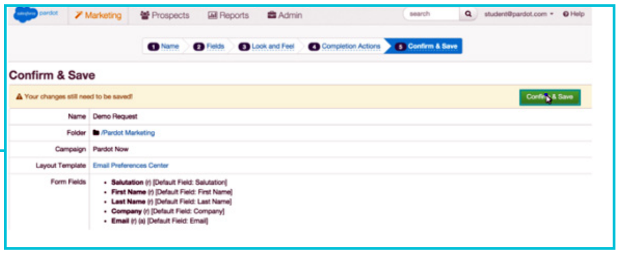
7



9



12

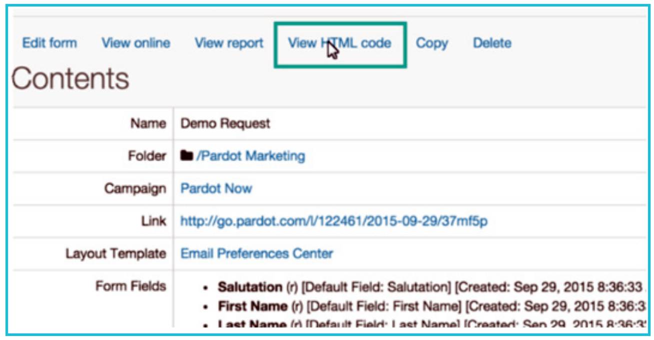


GUIDE

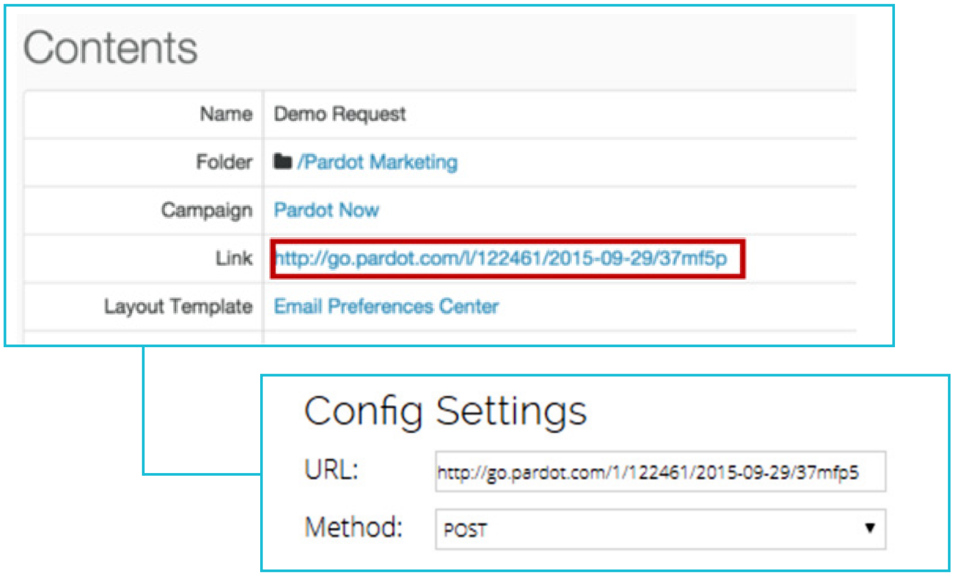
2. DETERMINE THE POST URL

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.

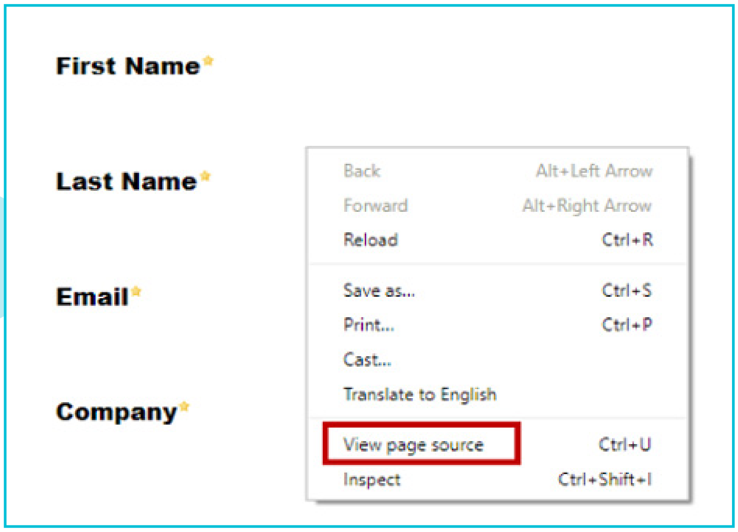


From there, copy the link provided, and paste it into the POST URL field for the Portal.



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

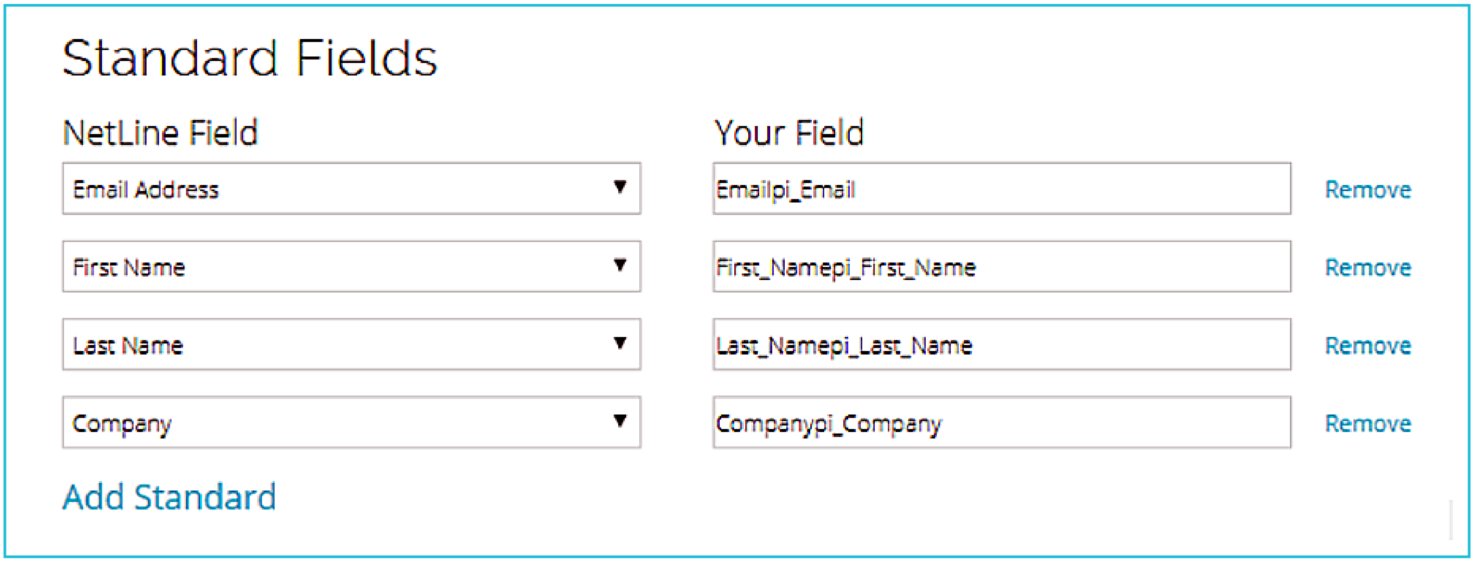
The Standard section consists of the the standard information that we collect on the leads (First Name, Last Name, Email, Company, Title, Address, Phone, etc.) Please note that if any of your fields have picklists, you will need to setup mapping to those picklists in step 6 on the Portal (Mapping), prior 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.

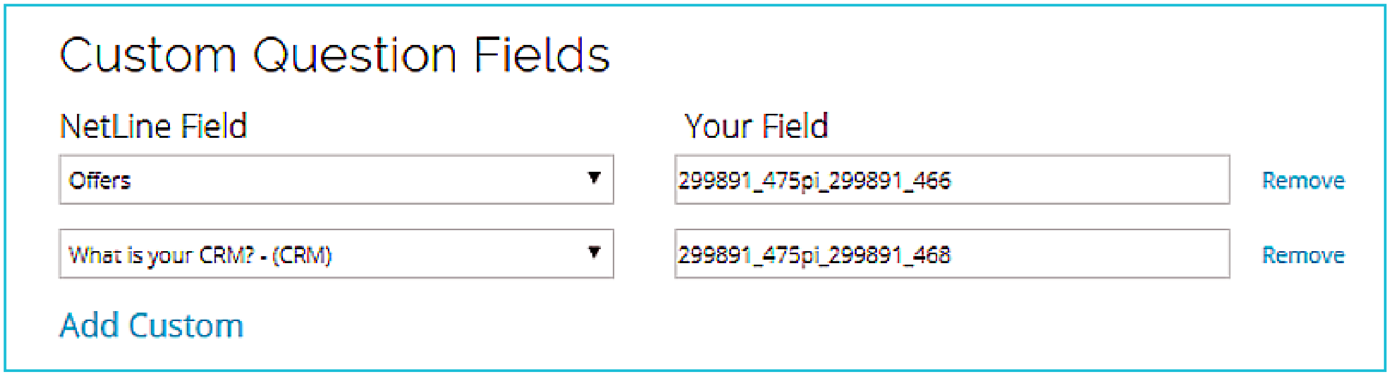


5. CUSTOM QUESTIONS FIELDS SECTION

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.

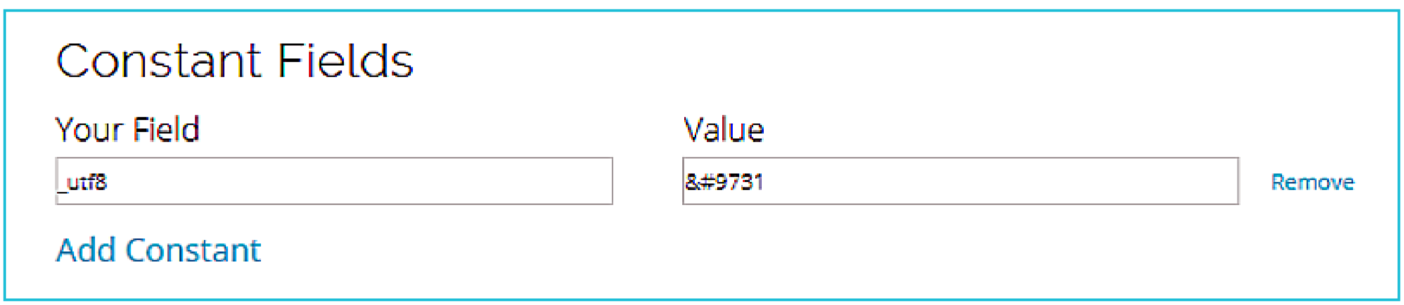


6. HIDDEN FIELDS SECTION

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 = &#9731

Setup on the Portal looks like this:



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

GUIDE

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 = &#9731

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.