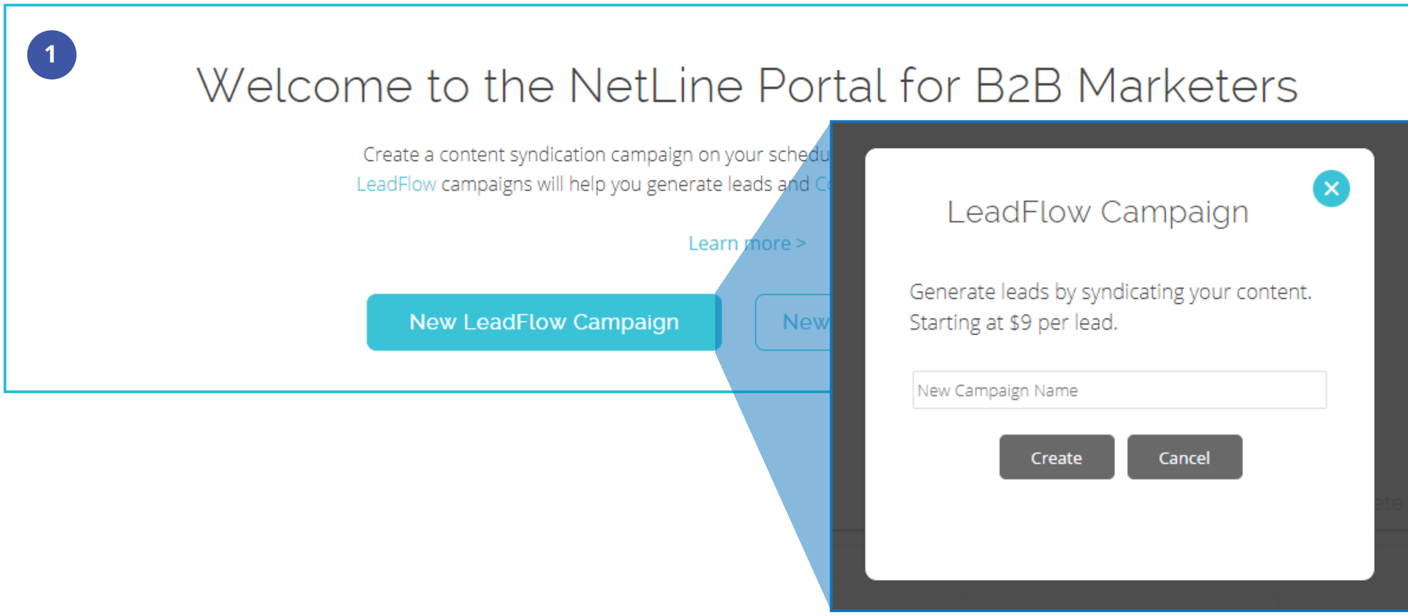
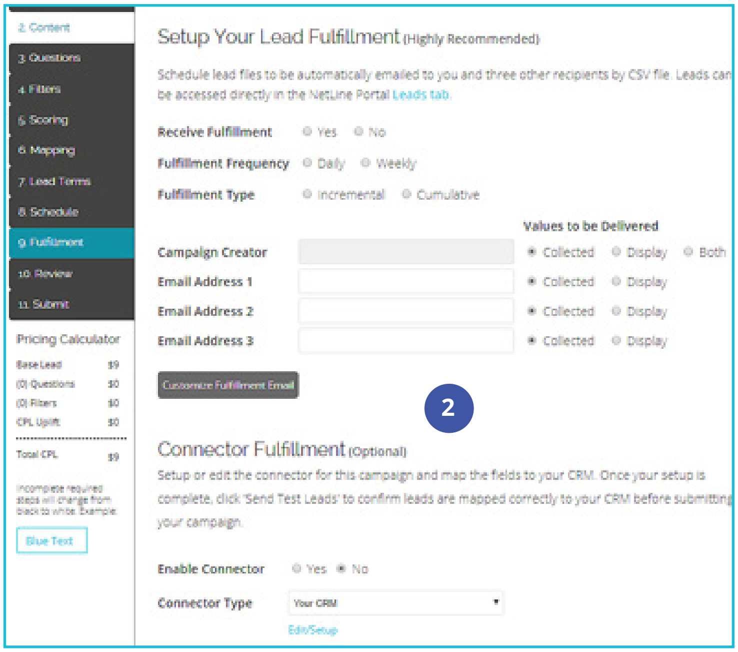
Engage with your leads faster with NetLine's Connectors.

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



Setup Your Lead Fulfillment

1. After setting up your free NetLine Portal account, you can 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 setup connectors on the 9th step, '9. Fulfillment' of the campaign creation process.



Choose A Method

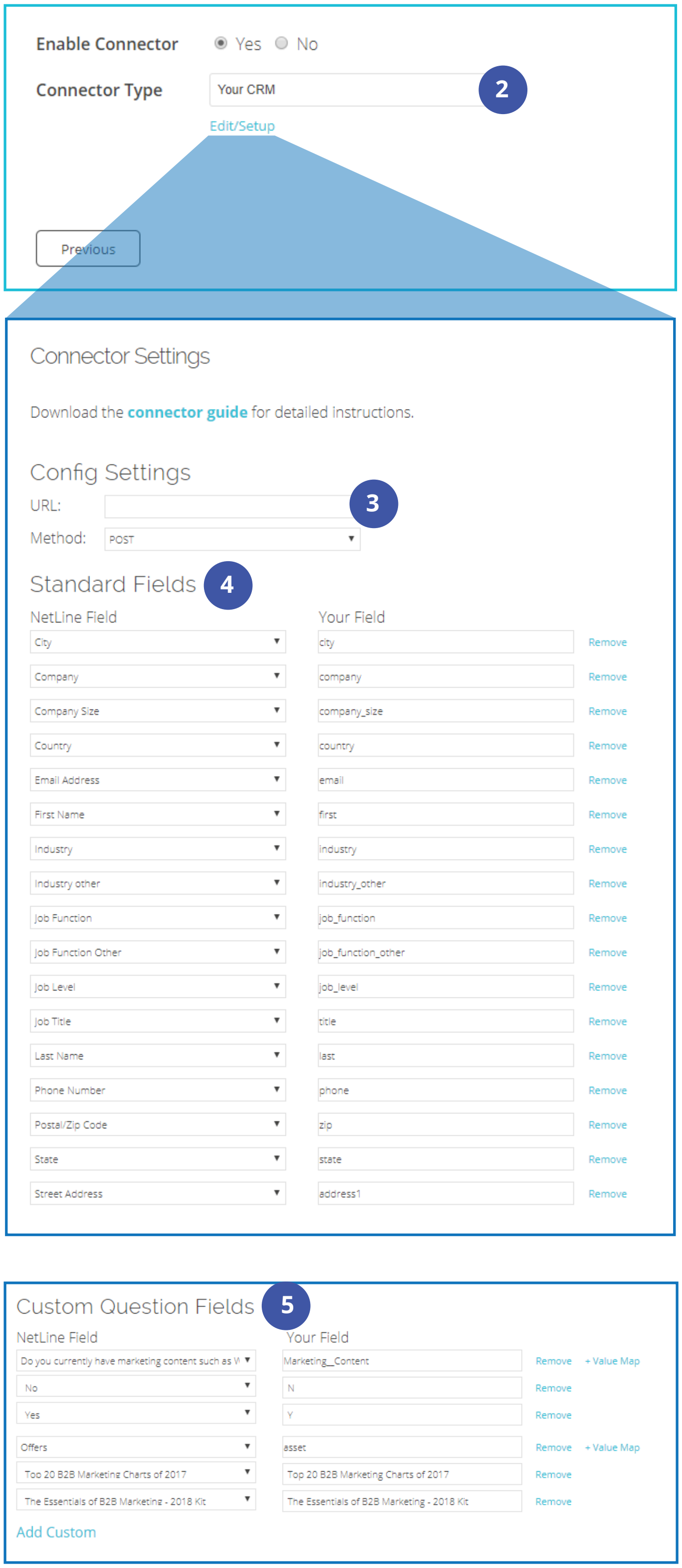
This can be done in two different ways:

1. Campaign level
2. Account level

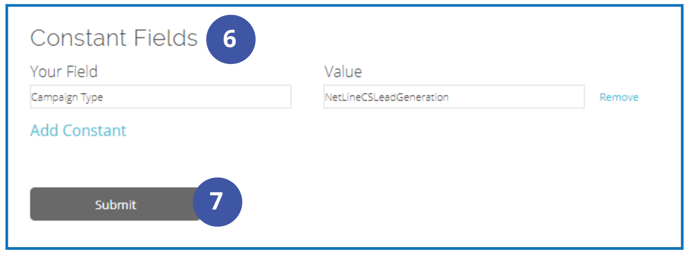
All LeadFlow campaigns will leverage the connector settings established at the account level, unless connectors are set up at the individual campaign level.

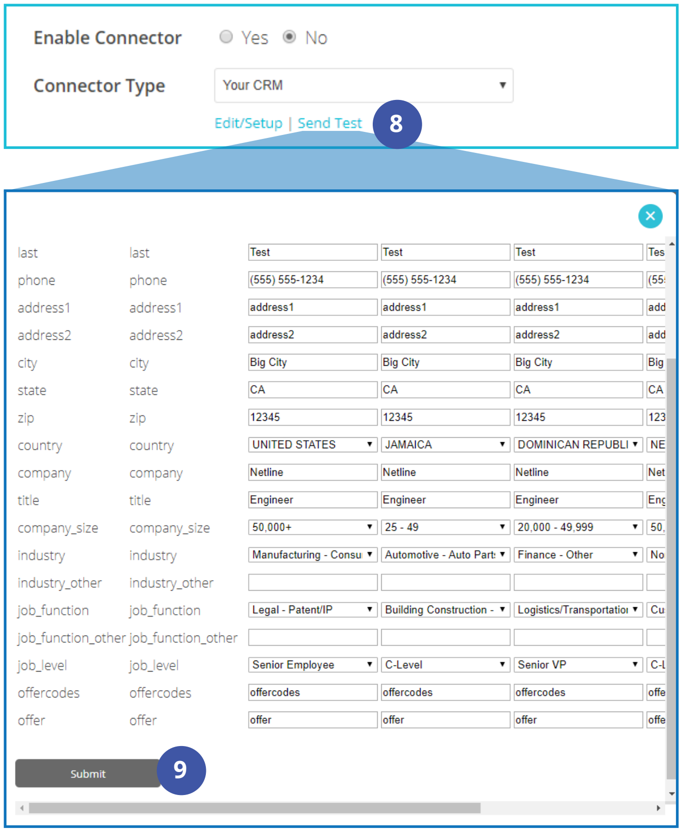
METHOD 1: CAMPAIGN LEVEL

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).



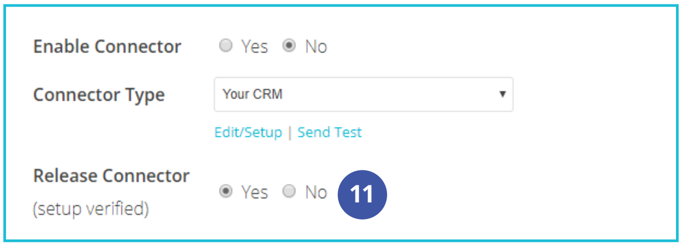
6. 'Constant Fields' allow you to append additional fields where the value remains the same for each record posted. This can be helpful should you choose to identify NetLine's leads generated by other sources.
7. Complete the mapping process by clicking 'Submit'.
8. To ensure that you've mapped your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

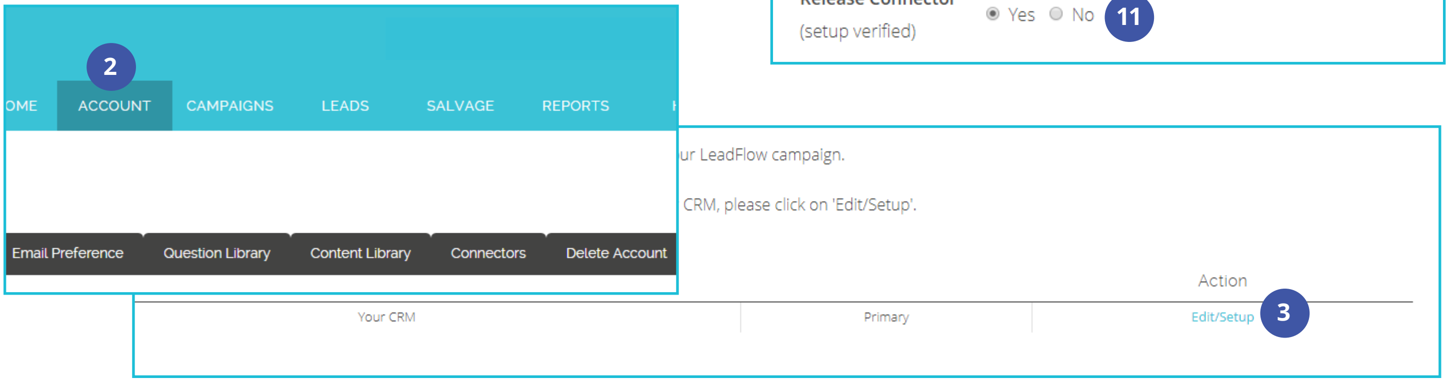




METHOD 2: ACCOUNT LEVEL

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.



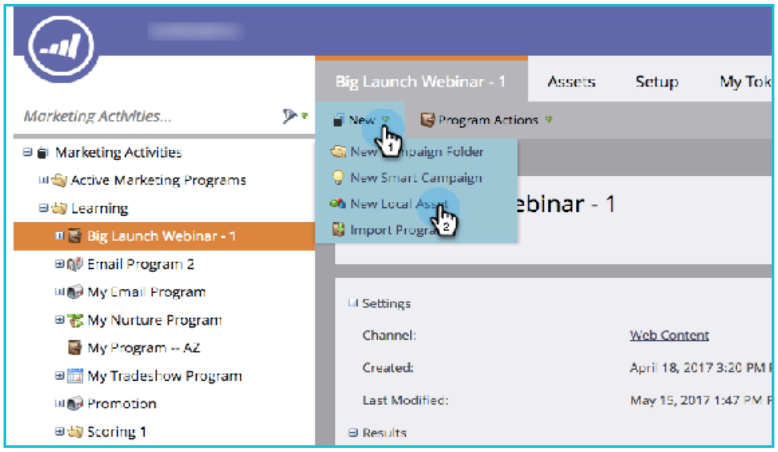


How to Connect the NetLine Portal to Marketo

1. CREATE A FORM IN MARKETO

1. Go to Marketing Activities to find and select your program
2. Under New, click New Local Asset and select Form
3. Enter a form name, check the checkbox for “open in editor” and click Create
4. On Field Details, click the plus sign to select and add fields to your form
5. Once finished, click on Form Settings, to design your form
6. First, choose “Plain” as your Form Theme, then click Next
7. Fill out the form settings such as language, font, and position. Remember that nobody will actually see this form, so it only needs basic designing. Do not add any social profiles and set progressing profiling to disabled
8. For the Thank You Page section, select Stay on Page
9. Click Next to move to the finish step
10. Click Preview Draft to preview the form then Edit Draft to go back
11. Once setup is verified, click Approve and Close to save

1- 3



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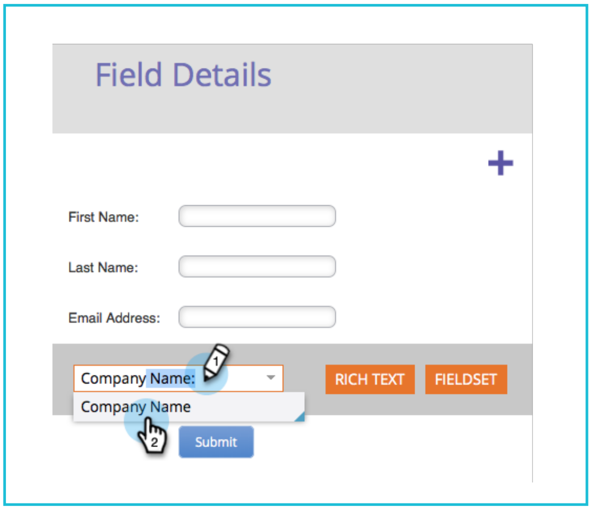

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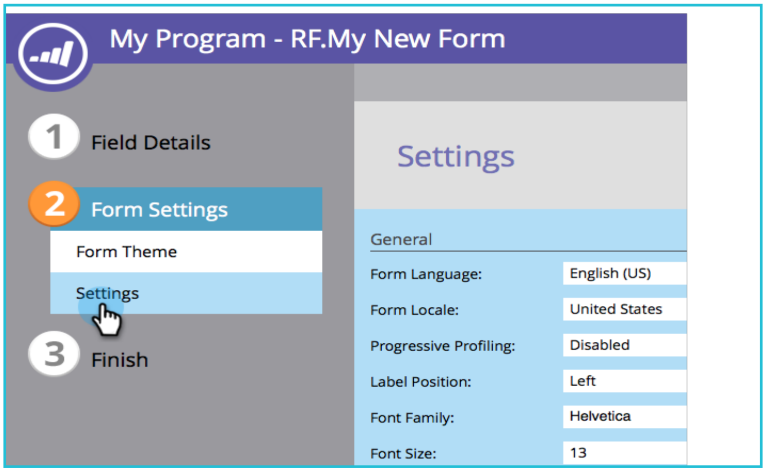

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2. FINDING YOUR FORM EMBED CODE

Go to **Marketing Activities**, find and select your form.

Click on **Form Actions** and choose **Embed Code**, which will be in this format:

Sample Embed Code

```
<script src="//app-sj04.marketo.com/js/forms2/js/forms2.js"></script>

<form id="mktoForm_1234"></form>

<script>MktoForms2.loadForm("//app-sj04.marketo.com", "999-XXX-999", 1234);</script>
```

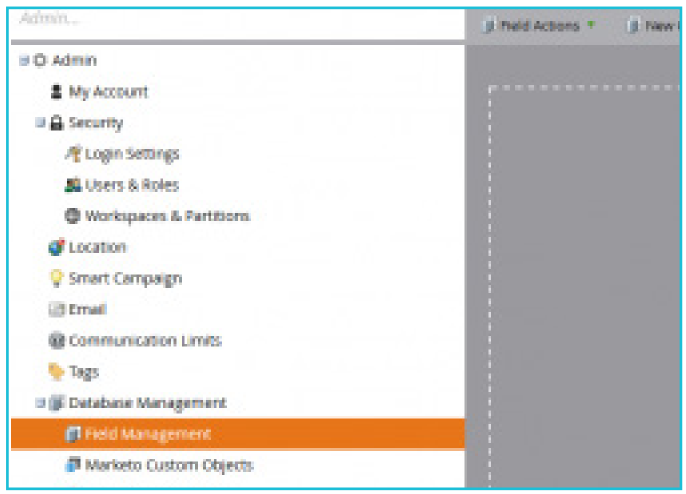
3. FINDING MARKETO API FORM FIELD NAMES

Go to **Admin**, then **Field Management.**

Click on **Export Field Names** and a filed named,

"Fields.xls" will save. There are two columns, REST & SOAP, with slightly different field names. **Use the SOAP API** field names, since we used Forms 2.0 to create our form.

Because custom fields create many variables, we recommend pulling field names from your unique Admin settings.



4. CONNECTING TO THE PORTAL

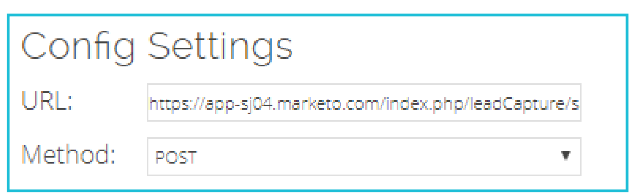
Taking the embed code to the form and the API field names, you can now set up the connection either at the account level or campaign level. Account level: click Connectors tab. Campaign level: click step 9 (Fulfillment). (Note below that "xxxx" represents the custom characters in your embed code following "app-".)

1. Marketo POST URL standard format: **https://app-xxxx.marketo.com/index.php/leadCapture/save**

2. Paste "app-sjo4.marketo.com" from the embed code into the standard format to get the full POST URL

3. Using our sample code, our POST URL = **https://app-sj04.marketo.com/index.php/leadCapture/save**

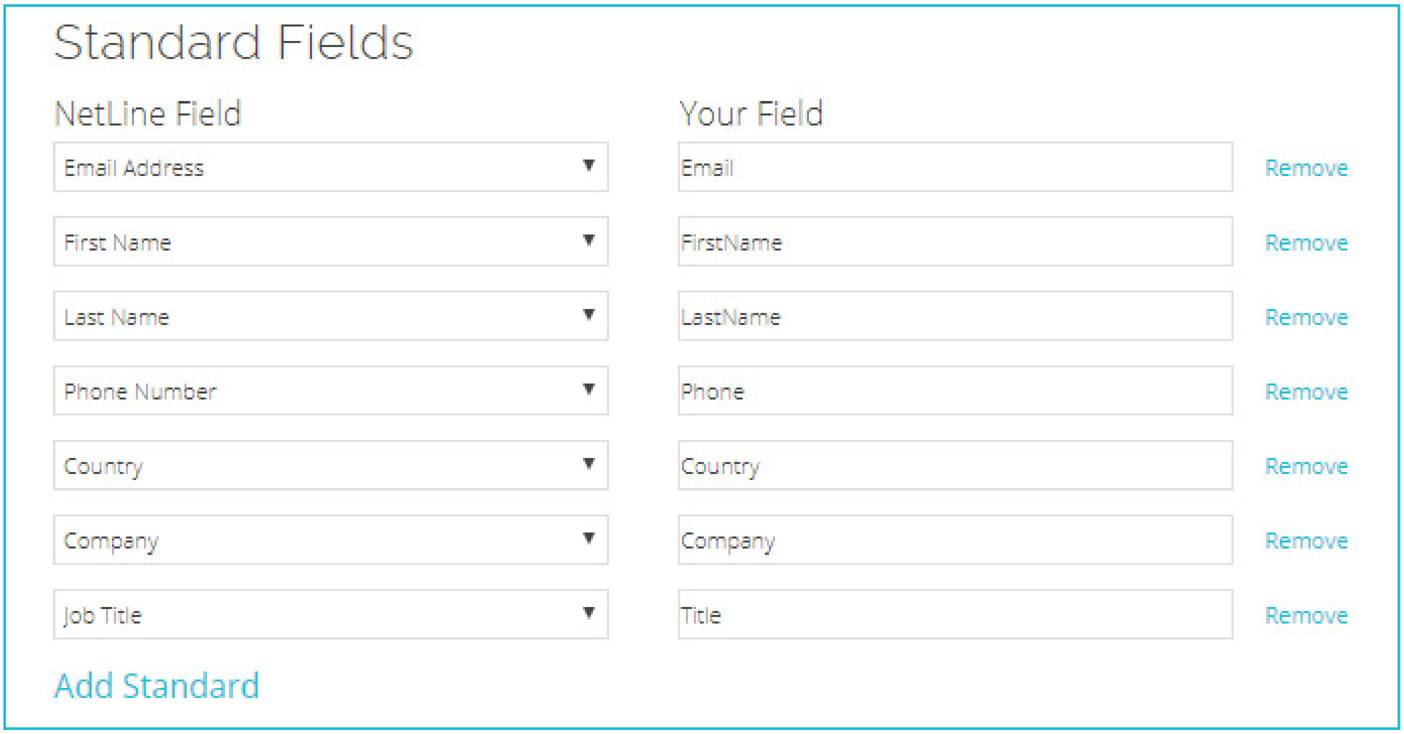
4. Method = POST



5. STANDARD FIELDS

Edit the standard section so it only displays the fields that are on your Marketo form.
To do this, use the list of API field names gathered from Admin in Marketo. Use the fields that are on the "SOAP" API Field name list.

The example below is what setup would look like for a Marketo form that has Email, First Name, Last Name, Phone, Country, Company, and Title as the only standard fields on their form.

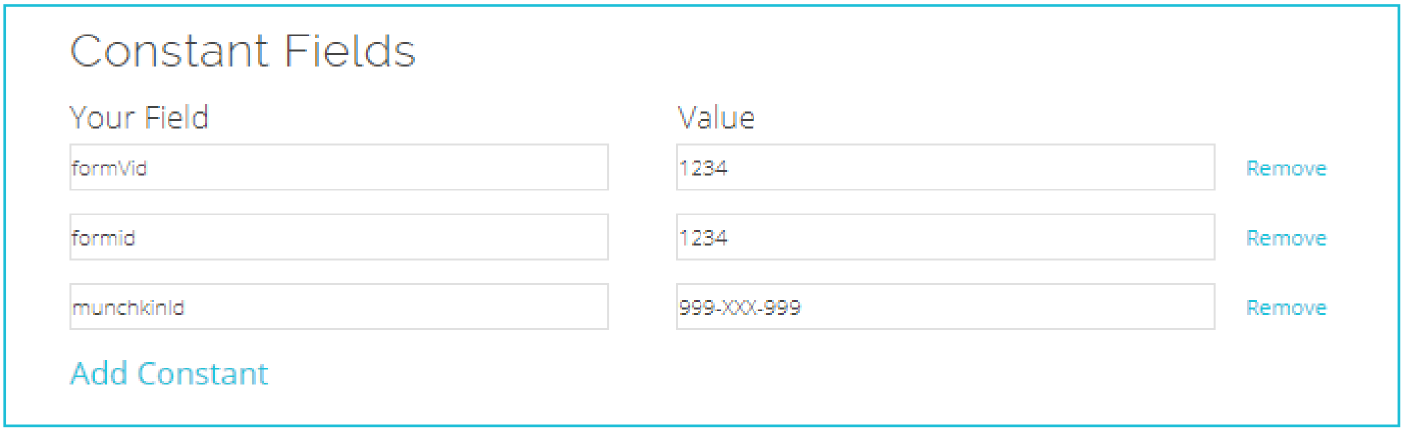


6. CUSTOM QUESTIONS

This section consists of custom questions for the campaign and offer names for content. This data can only be sent if the questions are on the Marketo form.

7. CONSTANT FIELDS

This section consists of any hidden fields on your form and the Marketo required hidden fields: formid, formVid and munchkinId



8. SEND TESTS & RELEASE CONNECTOR

Once all sections are complete, click Submit to close out of the setup. From the Portal screen, click “Sent Tests” to send test records and confirm setup. Cross reference with Marketo to confirm; all entries should transmit within a minute if properly configured.

Next section: Troubleshooting

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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. If you have a picklist of values for anything in the Standard Section, please go to step 6 (Mapping) in campaign setup 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 to the API names exported from Marketo (i.e. Email vs. email). Also, verify that hidden fields are as follows:

- **formid**
- **formVid**
- **munchkinId**

STANDARD AND CUSTOM FIELD MISMATCHES

While there are many values available to send on the connector setup page, only the values that are on the Marketo form can be sent. For example, if your Marketo form does not have an "Industry" field, "Industry" will not be ablle to pass through from the connector setup.

Similarly, if there is a field on the Marketo form that is missing from the connector setup, the connection will fail.