eTrigue Corporation
6399 San Ignacio Avenue
San Jose, CA 95119

www.etrigue.com

800.858.8500 toll-free
408.490.2901 fax

eTrigue® DemandCenter®

CRM Integration Best Practices and Self-Setup for Salesforce

eTrigue DemandCenter provides Salesforce users insight into the leads and contacts visiting your website during the sales process to help close more deals faster. To keep your sales team working in Salesforce CRM and focused on closing more deals, eTrigue's integration with Salesforce is fully customizable and designed to work the way you do.

Features of eTrigue CRM Integration include:

- Push new Leads to Salesforce
- Update Leads and Contacts with recent eTrigue visitor tracking stats
- Synchronize campaign membership information
- Synchronize custom field data with selectable bi-directional mappings

Steps to enable CRM Integration between eTrigue and Salesforce:

1. Install the eTrigue CRM Package
2. Set up the Lead to Contact Mappings for eTrigue Fields
3. Add eTrigue Tracking Sections to Page Layouts
4. Enter Salesforce Credentials to be used for ongoing integration
5. Notify the Customer Success Manager (CSM) for your eTrigue account

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Step 1: Install the eTrigue CRM package

The **eTrigue CRM package** creates custom fields in Salesforce to store eTrigue tracking data and the package will add eTrigue as an authenticated remote site.

Install the CRM Package:

1. Click on this link (or copy/paste into your browser):
   https://login.salesforce.com/packaging/installPackage.apexp?p0=04t40000000U73v

2. Enter Salesforce Administrator credentials to log-in and proceed with the installation.
   a. If prompted by Salesforce, choose **Install for All Users**.

Here are the specifics of what is installed:

- eTrigue will be added a Remote Site with the following settings:
  - **Remote Site Name:** eTrigue
  - **Remote Site URL:** http://wcf.etrigue.com

- The following custom fields are added to Salesforce **Lead** and **Contact** objects

Field	Data Type	Length	Notes
Activity Score (etrigue _activity_score__c)	Number	18,0	Stores eTrigue [Activity Score] from the matching Prospect in DemandCenter.
Cumulative Length of Stay (dd:hh:mm:ss) (etrigue _length_of_stay__c)	Text	20	Stores eTrigue [Length of Stay] from the matching Prospect in DemandCenter.
Demographic Score (etrigue _demographic_score__c)	Number	18,0	Stores eTrigue [Demographic Score] from the matching Prospect in DemandCenter.
eTrigue ID (etrigue _id__c)	Text	100	Stores the eTrigue ID from the matching Prospect in DemandCenter.
eTrigue Link (etrigue _link__c)	URL	255	A direct link to the matching Prospect in DemandCenter.
eTrigue Source (etrigue _source__c)	Text	100	Stores eTrigue [Source] from the matching eTrigue Prospect in DemandCenter.
etrigueignore (etrigueignore__c)	checkbox	n/a	When checked, the record will be ignored by eTrigue CRM integration services.
Last Visit (etrigue _last_visit__c)	Date	n/a	Stores eTrigue [Last Visit] from the matching Prospect in DemandCenter.
Memo (etrigue_note__c)	Long Text Area	2000	Stores eTrigue [Memo] from the matching Prospect in DemandCenter.

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Total Page Count (etrigue _total_page_count__c)	Number	18,0	Stores eTrigue [Page Count]from the matching Prospect in DemandCenter.
Total Visit Count (etrigue _visit_count__c)	Number	18,0	Stores eTrigue [Visit Count] from the matching Prospect in DemandCenter.

- In addition, the **Campaign**, **Account**, and **Opportunity** objects will have the following field added:

Field	Data Type	Length	Notes
eTrigue ID (etrigue _id__c)	Text	100	Stores the eTrigue ID from the matching Prospect in DemandCenter.

Step 2: Setup the Lead to Contact Mappings for eTrigue fields

This step makes sure that all eTrigue tracking field data for the Lead record will be properly carried over when converting a Lead to a Contact.

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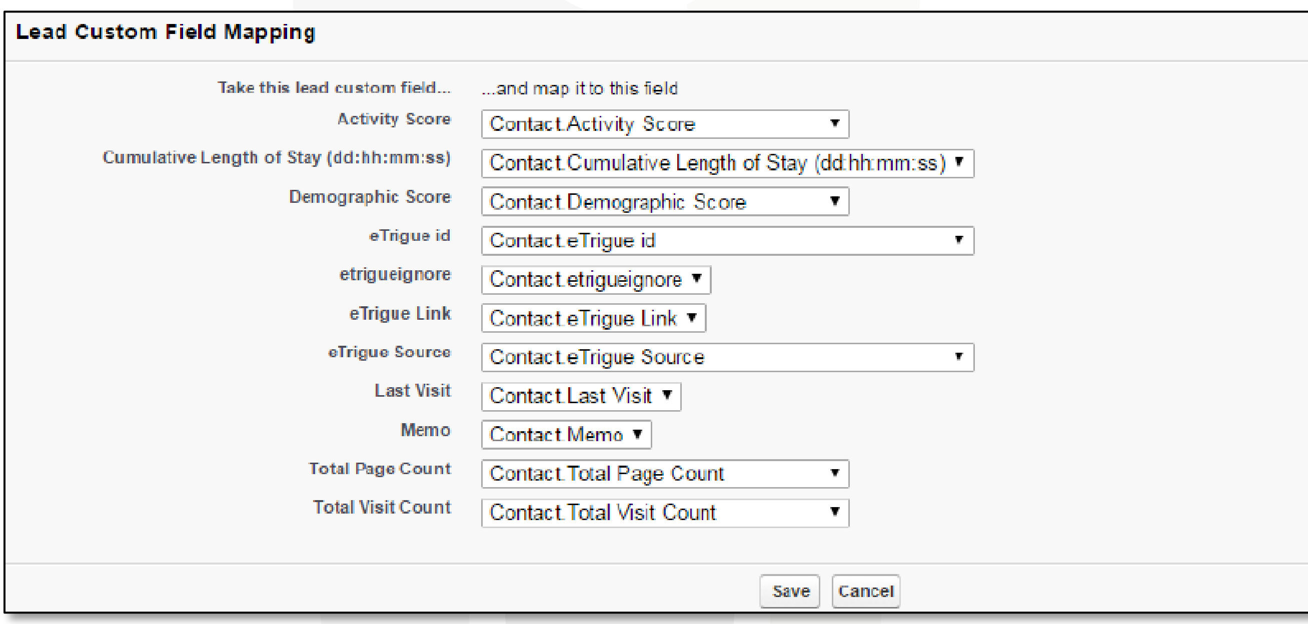
1. Go to **Setup > Customize > Leads > Fields.**
2. In **the Lead Custom Fields & Relationships** section of the screen, click **Map Lead Fields**.
3. Use the provided pull-down menus to match the following Lead Fields to their corresponding counterpart on the Contact object:
    a. Activity Score
    b. Cumulative Length of Stay (dd:hh:mm:ss)
    c. Demographic Score
    d. eTrigue id
    e. etrigueignore
    f. eTrigue Link
    g. eTrige Source
    h. Last Visit
    i. Memo
    j. Total Page Count
    k. Total Visit Count



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Step 3: Add eTrigue Tracking Sections to Page Layouts

Adding eTrigue Tracking Sections to your page layouts will allow your users to view eTrigue Tracking information within their records' details.

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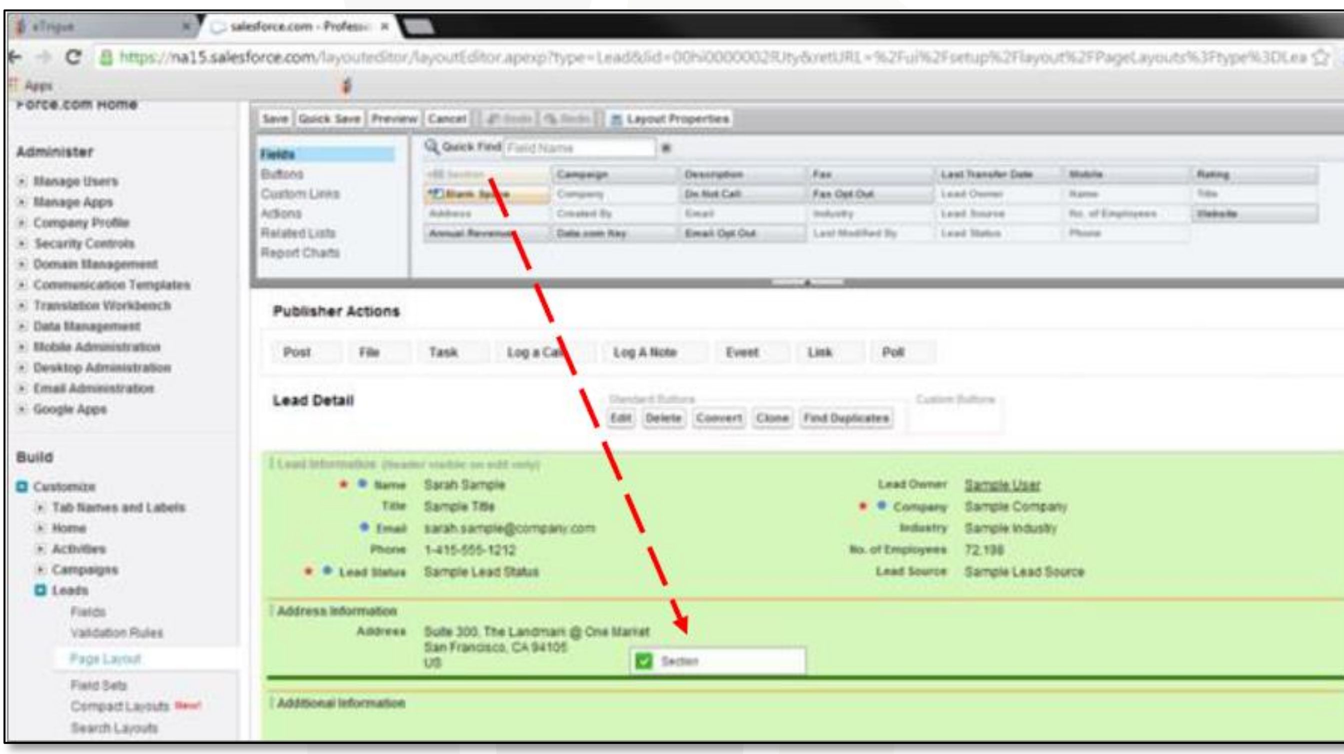
1. Go to **Setup > Customize > Leads > Page Layouts**.
2. Under **Lead Page Layouts**, click **Edit** for the layout that your users view for Leads.
3. Within the Page Layout tool, select **Fields** from the left hand side.
4. Click and drag the **Section** box from the tool bar at the top of the screen to the area of the page where you would like your eTrigue section to reside on your page layout.

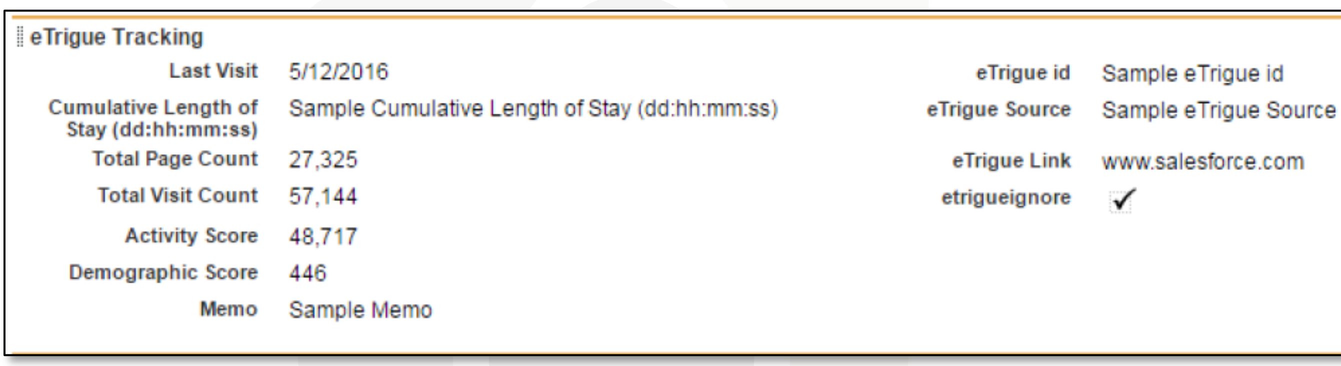


5. In the **Section Properties** prompt that appears, configure the following, then click **OK**:
    a. **Section Name:** eTrigue Tracking
    b. **Layout:** 2-Column
    c. **Detail Page:** enabled (checked)
    d. **Edit Page:** enabled (checked)

6. Click and drag the the following fields from the tool bar at the top of the screen into the **eTrigue Tracking** section:
    a. Activity Score
    b. Cumulative Length of Stay (dd:hh:mm:ss)
    c. Demographic Score
    d. eTrigue id
    e. etrigueignore
    f. eTrigue Link
    g. eTrige Source
    h. Last Visit
    i. Memo
    j. Total Page Count
    k. Total Visit Count
    l. Email Opt Out

*(**Note**: Salesforce Professional accounts <u>must add ALL eTrigue fields</u> to the Lead and Contact Page layouts, due to Salesforce Professional's API restrictions on field visibility).*

Here is an example of an eTrigue Tracking section layout:



7. Click **Save** to retain your changes to the **Lead** page layout.

8. Repeat steps 2-7 for the **Contacts** under **Setup > Customize > Contacts > Contact Layouts**.

9. **(Salesforce Professional only):** Create a new section called **eTrigue Tracking** and add the **eTrigue ID** field into the section for the following objects:
    a. **Accounts**
    b. **Campaigns**
    c. **Opportunities**

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Step 4: Enter Salesforce Credentials to be used for ongoing integration

This step ensures that your eTrigue instance can communicate to Salesforce using valid user credentials. For more information on Salesforce's security requirements, click here.

Details about the User Account :

- **Required permissions for the user account:**
  - read, update, and create Leads
  - read and update Contacts
  - read, update, and create Campaigns
  - read and update Accounts
  - read and update Opportunities
  - The [**Email Opt Out**] field must be[**visible**] and [**editable**] for this user.
  - [**Marketing User**] checkbox is enabled for the ongoing user

- **Recommended:**
  - This user account should be dedicated for eTrigue CRM Integration only.
  - The user account is assigned to the [**Systems Administrator**] profile to ensure that the Integration can access all fields.

Provide the credentials in your DemandCenter Account:

1. Log into eTrigue DemandCenter via your eTrigue user account provided by your CSM.

2. Go to **Settings > Integration Settings > CRM Integration > Credentials**. Configure the following:
   a. **CRM Type:** Choose '**Salesforce**'.
   b. **Username:** Input the username of the ongoing Salesforce user account
   c. **Password:** Input the corresponding password for this user account.
   d. **Account Type:** Choose the version of Salesforce that applies to your organization.
   e. **Security Token:** Input the Salesforce Security Token associated with the username.

3. Click **Save** to retain your CRM credential settings.

4. Click **Test** to verify your CRM credential settings.

   A message will appear to indicate if the saved credentials are valid. If you see:
   Error: CRM credentials are invalid. Login failed.

   Review the inputted credentials and make any changes as necessary. Click **Save** and then **Test** to verify the credentials until successful.

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Step 5: Notify the Customer Success Manager (CSM)

After you have completed Steps 1 - 4, notify the eTrigue Success Team by sending an email to success@etrigue.com. Your CSM will follow up with the administrator of your eTrigue account to complete the setup of CRM Integration.