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Overview

Validar Lead Import 3.0 still has all the features you need to import your offline leads into Salesforce, and now it includes new features to bring all of your leads regardless of medium with AnySource web to lead.. Validar AnySource is a form building tool which outputs code to support Ajax and Flash applications along with simple html. AnySource output formats include:

- ASP
- C#
- HTML
- JSON
- JAVA
- PHP
- VB.NET
- MS Excel –VB

Intro

This document is for users who have downloaded and installed Lead Import from the Salesforce AppExchange into their Salesforce Org.

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Validar Terms

Term	Definition
Lead Source	The originating source of the Leads; TradeShow Exhibit, Registration Kiosk, Web Form
Available	Leads are available to be processed by Validar. The Leads Exist in Validar and are ready to be processed
Processed	Leads which have been executed by Lead Import
Omitted	Leads which didn't pass the filtering criteria. To allow Omitted Values, go to the Validation steps, and remove some constraints
Matched	Leads which matched either existing Leads or Contacts. To see a breakdown of Leads vs Contacts, select the Lead Source Details.
Created	Number of New Leads Created by Validar
Errors	Salesforce.com generated errors only. For example, a field may only allow unique values but unique values are not passed in from Validar would cause an error.
Test Mode	Allows Leads to be imported into Salesforce and Validar with the Values of "_TEST_" appended.
Production Mode	Removes the "_TEST_" values
Active (Lead Sources)	Lead Sources which appear in the "Active"/Default View of the Dashboard. To Deactivate Lead Sources and clean up the dashboard view, you can select lead sources from the dashboard and select the red pushpin icon.
InActive (Lead Sources)	Lead sources which do not appear in the default view and have been flagged for Inactive.

Dashboard



[Home](#)
[Leads](#)
[Contacts](#)
[Opportunities](#)
[Validar Lead Import](#)
[About Validar Lead Import](#)
[Demo Lead Import](#)

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New Leads Available to Import
Click "Start" to begin the lead import definition process.

Dashboard
The list of available Lead Sources appears below.
[Create AnySource Form](#)

View: [Active](#) [Inactive](#)




		Lead Source	Last Response	Available	Processed	Omitted	Matched	Created	Errors	
☐		 ranking sample	Feb 13, 2009 (Fri) 01:54 PM	4	0	0	0	0	0	Start
☐		 MTI Landing Page		0	0	0	0	0	0	
☐		 Oaktree landing page number 1		0	0	0	0	0	0	
☐		 Jan 2009 IBPL White Paper Download		0	0	0	0	0	0	
☐		 vendaria banner ad		0	0	0	0	0	0	

Change page: < 1 > | Displaying page 1 of 1, items 1 to 5 of 5.

Lead Source Type

 = Online Lead Source

 = Offline Lead Source

Mode

 = Test

 = Production

Create a AnySource Form

Creating the AnySource web-to-lead form is an easy process of identifying the fields and generating the code.

1. Select the “Create AnySource” Button from the homepage
2. Choose “New” or Create from an “Existing Lead Source”. Choose an existing Lead Source if you’ve created a large amount of survey questions.

The screenshot shows the 'AnySource - Creation' form. At the top, the 'Validar Lead Import' logo is on the left, and a progress bar with four tabs (Creation, Information, Field Mapping, Summary) is on the right, with 'Creation' being the active tab. Below the header, the title 'AnySource - Creation' is followed by a sub-instruction: 'If you have an existing AnySource Form with settings to reuse, then select 'Clone existing'. Otherwise, select 'Create new'.' The main content area contains two radio buttons: 'Create new' (which is selected) and 'Clone existing'. Below the 'Clone existing' radio button is a dropdown menu with the text '-- Select AnySource Lead Form --'. At the bottom right of the form are three buttons: 'Cancel', '< Back', and 'Next >'.

3. Add the Lead Source Name

The screenshot shows the 'AnySource - Information' form. The header is identical to the previous form, with the 'Creation' tab active in the progress bar. The title 'AnySource - Information' is followed by the instruction: 'Please enter or change the name of the AnySource Form.' Below this is a text input field labeled 'Name:' containing the text 'Jan 2009 I BPI White Paper Download'. At the bottom right are three buttons: 'Cancel', '< Back', and 'Next >'.

4. Create a form by defining the specific fields from the Salesforce Lead Object

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Creation Information **Field Mapping** Summary

Any Source - Field Mapping

Step 1 - Verify the default mapping between Salesforce and Validar. Make changes where necessary.
Step 2 - Create new field mappings by clicking the "New" buttons and selecting your Salesforce field. If the field does not exist, contact your account manager.

Salesforce Lead	Validar AnySource Form	
[Text]	Contact Information <ContactInfo> [Text]	Question
First Name <FirstName> [Text]	First Name <FirstName> [Text]	Question Type
Last Name <LastName> [Text]	Last Name <LastName> [Text]	
Company <Company> [Text]	Company <Company> [Text]	Response
Title <Title> [Text]	Title <Title> [Text]	Response Type
Email <Email> [Email]	Email <Email> [Text]	
Street <Street> [Text]	Street <Street> [Text]	
City <City> [Text]	City <City> [Text]	
State/Province <State> [Text]	State/Province <State> [Text]	
Zip/Postal Code <PostalCode> [Text]	Zip/Postal Code <PostalCode> [Text]	

5. To create a question which doesn't exist in the Salesforce Lead record 'Select New Question', "Custom Question"
 - a. Question: question text
 - b. Property: Form Tag value
 - c. Type: Type of Question
 - i. Pick One
 - ii. Pick Many (Multi-Select)
 - iii. Text

[Custom]

Question:

Property:

Type: -- Select Type -- ▼

Cancel OK

- Salesforce.com fields which are not in the AnySource form appear in the Unmapped Fields section:

Unmapped Lead Fields			
Annual Revenue <i>[Currency]</i>	Lead Source <i>[Picklist]</i>	Rating <i>[Picklist]</i>	Website <i>[Url]</i>
Current Generator(s) <i>[Text]</i>	Mobile Phone <i>[Phone]</i>	Salutation <i>[Picklist]</i>	
Description <i>[Text]</i>	Number of Locations <i>[Floating Point]</i>	SIC Code <i>[Text]</i>	
Employees <i>[Integer]</i>	Primary <i>[Picklist]</i>	Status <i>[Picklist]</i>	
Industry <i>[Picklist]</i>	Product Interest <i>[Picklist]</i>	Unread By Owner <i>[Boolean]</i>	

Review the unmapped fields prior to generating

- Review and Create the Lead Source
- Next Set the Lead Import Processing Rules

Generate AnySource Form Code

The newly created lead source is in a test state, from here code needs to be created and the form code can be validated.

- Select the Name of the Lead Source from the Dashboard to View the Lead Source Specific Details:

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Detail For Lead Source 'Jan 2009 I BPI White Paper Download'

Information about the currently selected Lead Source is shown below along with all import processing events. [Edit AnySource Form Settings](#) | [Create Import Settings](#)

DetailLeadsChartsHistory

Statistics

Available: 0	Matched Leads: 0	Created Leads: 0	Omitted: 0
Processed: 0	Matched Contacts: 0	Created Altered Leads: 0	Errors: 0

Rename

Name: Jan 2009 I BPI White Paper Download Rename

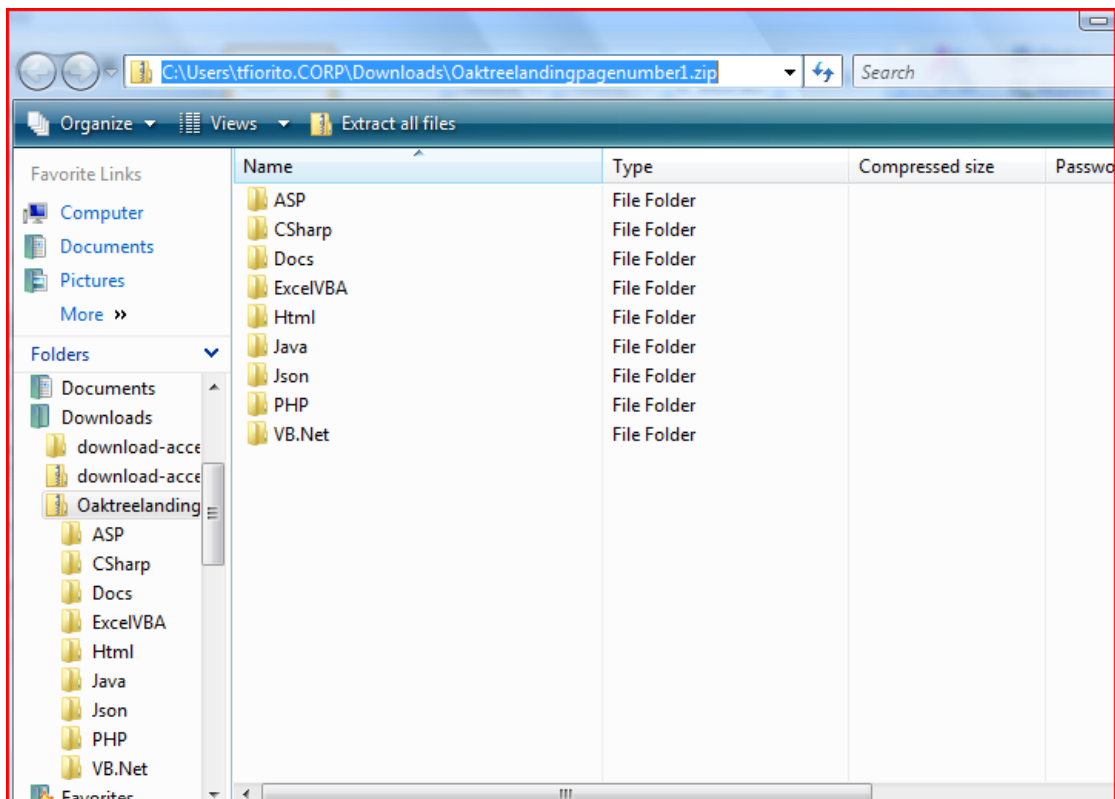
Test/Production

The lead source is in test mode. After testing is complete, promote the lead source by clicking the button. Promote

AnySource Form

Click the button to generate code for the AnySource Form. Generate Code

2. Select Generate Code:



3. For further details on implementing different types of lead source code, please review the “AnySource” Implementation Guide

Adding a Lead Ranking Question

One lead rank question can be added to an AnySource Form. The lead rank, could be explicit or hidden depending on the skill of the developer implementing the form. Lead Rank can then be extended into Salesforce, either by Salesforce Campaign and member status or within the Lead Rank fields.

Alternatively Lead Rank can be used to filter within Salesforce, for example ‘A’ and ‘B’ leads only go into Salesforce and C’s could be unqualified.

1. When Creating or Editing a AnySource Form, Select “New Question”. (Lead Rank will only appear if Lead Rank has not been created for a Lead Surce



2. Default Values

	Question:	Lead Rank
	Property:	LeadRank
[Custom]	Type:	[Pick One]
	Response:	A
	Property: <QPROP>_	A
[Custom]	Type:	[Pick One]
	Response:	B
	Property: <QPROP>_	B
[Custom]	Type:	[Pick One]
	Response:	C
	Property: <QPROP>_	C
[Custom]	Type:	[Pick One]
Cancel OK		

3. Default Values can be edited and new response values can be added after the initial save or OK.

[Custom]	Lead Rank <LeadRank> [Pick One]	Edit	Delete
[Custom]	A <LeadRank_A> [Pick One]	Edit	Delete
[Custom]	B <LeadRank_B> [Pick One]	Edit	Delete
[Custom]	C <LeadRank_C> [Pick One]	Edit	Delete
		New Response	

Lead Details captured by Validar

A new feature of Lead import is the ability to view raw captured data as it's collected by Validar, as well as aggregate views of the lead source.

1. View Lead Source Details
2. Select the Leads Tab

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Lead Import

Detail For Lead Source 'ranking sample'
Information about the currently selected Lead Source is shown below along with all import processing events. [Edit AnySource Form Settings](#) | [Create Import Settings](#)

Detail Leads Charts History

Select Columns Drag column to reorder. Use mouse to resize column.

Last Name	First Name	Company	Title	Visit Date
little	alex	valdiar	ceo	2/4/2009 4:02:20 PM
little	alex	valdiar	ceo	2/4/2009 4:02:20 PM
kippes	victor	validar	peeon	2/4/2009 2:10:27 PM

Change page: < 1 > | Displaying page 1 of 1, items 1 to 3 of 3.

Select a lead to show its detail.

Create Lead Import Rules

Either Create by selecting “Start” button or by the “Create Import Settings” Link. The import process is wizard based with the following steps of rule establishment:

- Creation
- Cleansing
- Validation
- Annotation
- Contact Mapping
- Lead Mapping
- Task Mapping

- Activity and Campaign Assignment
- Automation

Creation

1. Choose New or Existing Lead Source to establish rules from

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Lead Import

Creation Cleaning Validation Matching Annotation Mapping Assignment Automation Review and Import

[Dashboard](#)

Import - Creation

If you have an existing Lead Source with settings to reuse, then select 'Clone existing'. Otherwise, select 'Create new'.

☒ Create new
☐ Clone existing
-- Select Lead Source --

Cancel < Back Next >

Cleansing

Cleansing is the process of removing lead records from Validar prior to importing them into Salesforce. Options include:

- Delete Duplicates from Validar
- Delete Leads by Company or Email

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Lead Import

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Import - Cleaning

The Cleaning process can remove leads from the incoming data. Duplicate leads, demo leads, and leads from within your own company may be examples to consider.

☐ Delete duplicates.
Validar will automatically **delete all duplicate leads** captured on your Lead Retrieval Device. Duplicates are detected by matched email address. You can also choose to bypass this option and manually delete duplicate leads within Salesforce.

☐ Delete Leads matching the following company names.
(not case sensitive, partial name matches are accepted)
Examples:
ABC Company
Johnson Inc
Company Names (separate with a new line)

☐ Delete Leads containing the following email addresses.
(not case sensitive, full email address or domain names are accepted)
Examples:
jdoe@abccompany.com
starcompany.com
Email Addresses (separate with a new line)

☒ Process only new leads.
Validar can process only new leads, those that have arrived since the lead source was last processed, or all available leads.

Cancel< BackNext >

Validation

Validation or Filtering can be used to eliminate records that do not have complete data. Filtered records will be marked as Omitted. Filters can be used either by Lead Rank or by specific Contact information value.

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Lead Import

Creation Cleaning **Validation** Matching Annotation Mapping Assignment Automation Review and Import

Import - Validation

Some Lead Sources may have missing or incomplete information. To prevent Validar from creating Leads with incomplete information, select desired fields for validation.
For example, if you want imported Leads to always have a phone number, then check the box next to "phone". If the incoming data does not contain a phone number it will be omitted from import.

General

☐ First Name	☐ Street	☐ Visit Date
☐ Last Name	☐ Address 2	☐ Notes
☐ Company	☐ City	☐ Comments
☐ Title	☐ State/Province	
☐ Email	☐ Zip/Postal Code	
☐ Phone	☐ Country	
☐ Fax	☐ Website	

Select All Deselect All

Lead Categorization

Lead categorization is not available for this lead source.

Cancel < Back Next >

Matching

Choose what Salesforce objects you want to match to.

- Leads and Contacts (Default – Best Practices)
- Leads Only
- Contacts Only
- No Matching

The other option is to be able to choose to have blank fields updated by Values created by Validar

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Lead Import

Creation

Cleaning

Validation

Matching

Annotation

Mapping

Assignment

Automation

Review and Import

Import - Matching

Matching Leads and Contacts prior to creation of Leads prevents duplicates from being created.

Step 1 - Match (Default Leads and Contacts)

Matching both Leads and Contacts ensures the highest level of duplicate checking. To create more Leads, match only Leads or Contacts.

☒ Leads and Contacts

☐ Leads only

☐ Contacts only

☐ Do Not Match

Step 2 - Update Blank Fields (Default Yes)

Allow incoming Lead Source data to populate blank Contact and Lead Fields. If incoming data quality is poor, turn this option off.
Note: Validar will not overwrite fields populated with data.

☒ Update blank fields

Cancel

< Back

Next >

Annotation

A new feature of Lead Import 3.0 is to be able to specify which objects have the associated task created. They are all selected by default, however to minimize the amount of data created it's best to create these values when matched.

Validar

Lead Import

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Import - Annotation

New Tasks are created to help notify Salesforce.com users that action should be taken on the affected Contacts and Leads.

Create a Task

Select which scenarios will create a new Task.

☒ Create a Task when a Contact is matched

☒ Create a Task when a Lead is matched

☒ Create a Task when a Lead is created

Cancel

< Back

Next >

Mapping

Mapping is the process of associating fields from Validar Lead Capture to your Salesforce Organization. Validar will attempt to choose the default values to minimize the amount of data entry. In version 3.0, Task Mapping moves from annotation to the mapping model of the Contact and Lead objects.

Tips:

1. If you have mapping errors they can be resolved by selecting the “Remove Errors’ button, or they can be individually deleted.
2. All Responses and Possible Matches are options which can be mapped to Salesforce fields.
3. Make sure “Lead Source” is mapped within the Lead, if you are not using “Campaigns to map the Lead Source.
4. “Constant” Values are values set from too leads within the import.

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Import - Contact Field Mapping

Step 1 - Verify the default mapping between Salesforce and Validar. Make changes where necessary.
Step 2 - Create new field mappings by clicking the "New" button and selecting your Salesforce field. If the field does not exist, contact your Salesforce administrator.

Salesforce Contact	Validar Lead Source
First Name [Text]	Contact Information First Name [Text] Edit Delete
Last Name [Text]	Contact Information Last Name [Text] Edit Delete
Mailing Street [Text]	Contact Information Street [Text] Edit Delete
Mailing City [Text]	Contact Information City [Text] Edit Delete
Mailing State/Province [Text]	Contact Information State/Province [Text] Edit Delete
Mailing Zip/Postal Code [Text]	Contact Information Zip/Postal Code [Text] Edit Delete
Mailing Country [Text]	Contact Information Country [Text] Edit Delete
Company [Text]	Contact Information Company [Text] Edit Delete
Title [Text]	Contact Information Title [Text] Edit Delete

Mailing Zip/Postal Code [Text]	Contact Information Zip/Postal Code [Text]	Edit	Delete
Mailing Country [Text]	Contact Information Country [Text]	Edit	Delete
Company [Text]	Contact Information Company [Text]	Edit	Delete
Title [Text]	Contact Information Title [Text]	Edit	Delete
Email [Email]	Contact Information Email [Text]	Edit	Delete
Business Phone [Phone]	Contact Information Phone [Text]	Edit	Delete
Business Fax [Phone]	Contact Information Fax [Text]	Edit	Delete
New			
Restore Default Remove Errors			

Unmapped Contact Fields			
Assistant's Name [Text]	Home Phone [Phone]	Other City [Text]	Other Zip/Postal Code [Text]
Asst. Phone [Phone]	Languages [Text]	Other Country [Text]	Salutation [Picklist]
Birthdate [Date]	Lead Source [Picklist]	Other Phone [Phone]	
Contact Description [Text]	Level [Picklist]	Other State/Province [Text]	
Department [Text]	Mobile Phone [Phone]	Other Street [Text]	

Cancel < Back Next >

Assignment

Validar Lead Import leverages Salesforce.com's lead distribution rules. Users can choose from the Active rule or an existing rule that was previously created. Alternatively, the leads can be assigned to a Queue or a specific User.

Campaign Assignment has been greatly enhanced in Lead Import 3.0. Leads can now be assigned to a campaign based upon lead rank or specific response to a question. Also the Campaign Member status can be set for each one of campaigns selected offering extensive flexibility

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CreationCleaningValidationMatchingAnnotationMappingAssignmentAutomationReview and Import

Import - Assignment

When a Lead is created it needs to be assigned to a user or group of users so that they can take action on it. Please specify to whom new Leads will be assigned.

Lead Assignment

☒ Use active assignment rule

☐ Assign using assignment rule: -- Select Assignment Rule --

☐ Assign to queue or user

☐ Assign to queue: -- Select Queue --

☐ Assign to user: -- Select User --

Campaign Assignment

☒ Perform campaign assignment

Campaign question: -- Select Question --

Uncategorized -- Select Campaign -- -- Select Member Status --

Cancel

< Back

Next >

Automation

Automation is not required but it is recommended for AnySource lead sources or any offline sources which have requirements for real-time import. Note that the Salesforce.com Security Token will be required at the end of the password to set up automation.

Troubleshooting

After import, the best place to begin researching the results of the import is the processing History. From the Dashboard or Home> [Lead Source Name]> History Tab> Processing Report. From here you will see what was specifically created, matched and omitted as well as updated from the Validar Import.